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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q14-Q19):

NEW QUESTION # 14

Lake Tahoe Bank is migrating customer records from the Individual Model to Person Accounts. Which three steps should a Data Architect take to ensure a successful migration?

- A. Ensure Person Accounts is enabled on the org
- B. Use a CSV field to map PersonRecordTypeld to the Person Account RecoroTypeld and use Data Loader to update Client Records
- C. Enable 'Individual to Person Account Migration' in Custom Settings.

- D. Configure your Person Account record types in the Individual Record Type Mapper.
- E. Log a case with Salesforce to perform the conversion from the individual Model to Person Accounts.

Answer: A,B,D

Explanation:

The following steps are required to migrate customer records from the Individual Model to Person Accounts in Financial Services Cloud:

Ensure Person Accounts is enabled on the org. You need to have Person Accounts enabled before you can convert Individual Model records to Person Accounts. You can enable Person Accounts by contacting Salesforce Support or by using the Enable Person Accounts option in Setup > Account Settings.

Configure your Person Account record types in the Individual Record Type Mapper. You need to map your existing Individual Model record types to the corresponding Person Account record types. You can do this by using the Individual Record Type Mapper option in Setup > Financial Services Settings.

Use a CSV file to map PersonRecordTypeId to the Person Account RecordTypeId and use Data Loader to update Client Records. You need to update the Client records with the correct PersonRecordTypeId value that matches the Person Account RecordTypeId value. You can do this by using a CSV file and Data Loader to perform a bulk update operation. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2 :

Salesforce Help Article 3

NEW QUESTION # 15

Lake Tahoe Bank would like to restrict their Financial Services Cloud users from viewing certain types of milestones that might be irrelevant to their customers or might cause negative sentiment. How can the Salesforce Admin implement such a requirement?

- A. The Salesforce Admin can manage sensitive Life Events using Permission Sets.
- B. The Salesforce Admin can manage sensitive Life Events using sharing rules.
- C. The Salesforce Admin can hide the life Event or Business Milestone type, by removing it from the Event Type picklist.
- D. The Salesforce Admin can hide sensitive Life Events on the Life Events component on the Lightning Page using the Properties pane.

Answer: D

Explanation:

The Salesforce Admin can hide sensitive Life Events on the Life Events component on the Lightning Page using the Properties pane. The Life Events component is a Lightning component that displays a timeline of life events and business milestones for a client or a group. The Admin can use the Properties pane to customize the component and select which event types to show or hide on the timeline.

NEW QUESTION # 16

Which three related lists are visible within Actionable Relationship Center associated with the Account object?

- A. Financial Holdings
- B. Client Financial Goals
- C. Notes and Attachments
- D. Household Financial Accounts
- E. Cases

Answer: A,B,D

Explanation:

The following related lists are visible within Actionable Relationship Center (ARC) associated with the Account object: Client Financial Goals, which is a related list that displays the financial goals of the account, such as retirement, education, or debt payoff.

Financial Holdings, which is a related list that displays the financial accounts of the account, such as bank accounts, investment accounts, or insurance policies.

Household Financial Accounts, which is a related list that displays the financial accounts of the account's primary group, such as household or business group.

NEW QUESTION # 17

An asset management firm that is moving to Salesforce from its old CRM wants to be able to bring over its client data on drivers' licenses and passports. 55m 058 Which Financial Services Cloud object should a consultant recommend?

- A. Received Document
- **B. Identification Document**
- C. Identity Document
- D. Document Checklist Item

Answer: B

Explanation:

Identification Document is the Financial Services Cloud object that should be recommended for storing client data on drivers' licenses and passports. Identification Document is a standard object that represents a document that verifies a person's identity, such as a driver's license, passport, or national ID card. You can create identification document records for individual clients and link them to their person accounts. You can also store information such as document type, number, issue date, expiration date, and country of issuance.

References: [Identification Document Object], [Manage Identification Documents]

NEW QUESTION # 18

Our Personal Banker Hank Burton is learning to use Action Plans to ensure compliance in the clientonboarding process. Where can Hank see Action Plan Tasks? (2 options)

- A. Once the Action Plan is assigned, Hank can see the related Tasks on the Timeline.
- **B. Hank will be able to see the Action Plan Tasks assigned to him on the standard Salesforce task list.**
- **C. Hank will be able to see the Action Plan tasks on the related list of the Account page layout.**
- D. Hank will be able to see the Action Plan Tasks assigned to him on his calendar.

Answer: B,C

Explanation:

Hank can see Action Plan Tasks in two places:

On the related list of the Account page layout, where he can view all the tasks associated with an account and their status, due date, owner, and priority.

On the standard Salesforce task list, where he can view all the tasks assigned to him across different accounts and filter them by various criteria.

NEW QUESTION # 19

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