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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q104-Q109):

NEW QUESTION # 104
The Salesforce Admin of Lake Tahoe Bank wants to implement Financial Services Cloud using the individual object model. What are the steps to disable person accounts? (Choose Three)

- A. Assign the Person Account record type to the user profiles.
- B. Disable the Person Account custom setting.
- C. Remove Person Account record types from the Individual Record Type Mapper.
- D. Log a case with Salesforce to perform the conversion from Person Accounts to the individual model.
- E. Assign the Individual record type to the user profiles.

Answer: C,D,E

Explanation:
The following steps are required to disable Person Accounts and use the Individual object model in Financial Services Cloud:
Log a case with Salesforce to perform the conversion from Person Accounts to the individual model. You need to contact Salesforce Support to request the conversion from Person Accounts to the individual model.
This is an irreversible process that affects your data model and user interface. You should carefully evaluate your business needs and test the functionality in a sandbox or developer org before requesting the conversion in production.
Remove Person Account record types from the Individual Record Type Mapper. You need to remove any Person Account record types that are mappedto Individual record types in the Individual Record Type Mapper. This is a custom setting that defines how records are created when using certain features, such as Einstein Data Capture or Salesforce Inbox. You can access this setting by going to Setup >Financial Services Settings > Individual Record Type Mapper.
Assign the Individual record type to the user profiles. You need to assign the Individual record type to the user profiles that need to create or access Individual records. The Individual recordtype is a standard record type on the Account object that represents an individual person who is not directly related to your business, such as a prospect, influencer, or household member. You can assign record types by going to Setup > Profiles > Object Settings > Accounts > Record Types. Verified References: : Salesforce Help Article 5 :
Salesforce Help Article 6 : Salesforce Help Article 7

NEW QUESTION # 105
Scott Adams is opening a joint savings account with his mom, Rachel Adams. Rachel Adams is the primary member ofthe Adams Household. Personal Banker Hank Burton wants to make sure that Scott's data is rolling up to the Adams Household. How can the Banker accomplish this?

- A. Add Scon as a Related Contact to the Adams Household.
- B. Make the Adams Household Scott's primary Group and edit tie Activities & Objects to ft* Up.
- C. Make the Adams Household Scotts pnmary Group and make Scott the pnmary member
- D. Disable the Primary Group setting fof Scon on the Adams Household

Answer: B

Explanation:
To make sure that Scott's data is rolling up to the Adams Household, the Banker should make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up. A primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client.You can use primary Group to roll up financial data from all the financial accounts that are related to the client or the group. By making the Adams Household Scott's primary Group, the Banker can ensure that Scott's financial data is included in the household summary. The Banker can also edit the Activities & Objects to Roll Up to specify which items, such as financial accounts, goals, or referrals, should be rolled up for Scott. Verified References: : Salesforce Help Article 4

NEW QUESTION # 106
Early in the discovery and solution meetings, it was determined that the client would primarily use out-of-the- box Financial Services Cloud (FSC) objects and components with minimal custom objects needed. In addition, it was decided that records should be private, but the managerial chain would require visibility into all their direct reports' records.
Which three security settings must be set up in Salesforce to meet these requirements?

- A. Custom permission sets and out-of-the-boxFSC permission sets should be configured or updated and assigned to all users for the use of FSC components and field-level security.
- B. Organization-wide sharing defaults should be set to meet sharing requirements for all objects in use.
- C. The Role Hierarchy in setup should be configured to allow for managers to automatically see records of those under them.
- D. Only Custom Profiles should be configured and assigned to all users to use FSC components and field- level security. The