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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q165-Q170):

NEW QUESTION # 165
A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories.
Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?

- A. Add the Financial Account List component to the Account Lightning record page.
- B. Create Account lookup fields on the Financial Account object to link the Financial Accounts to an Account.

- C. Configure Financial Account record types to match the required categories.
- D. Configure the Financial Account List components for each required category.
- E. Create a custom picklist on the Financial Account object to track the Typ

Answer: B,D,E

Explanation:
Explanation
The following considerations should be included when configuring the report with branch management reportable objects:
Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are available for creating reports with Branch Unit Related Records. These are standard report types that allow users to create reports that show data from Banker, Branch Unit, Opportunity, Account, Lead, Contact, and Branch Unit Related Record objects.
The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer. These are custom objects that are part of the branch management feature in Financial Services Cloud. Banker is an object that represents a banker or an employee who works at a branch unit.
Branch Unit is an object that represents a physical location where bankers provide services to customers.
Branch Unit Related Record is an object that represents a record that is related to a branch unit, such as an opportunity, an account, a lead, or a contact. Branch Unit Customer is an object that represents a customer who has a relationship with a branch unit.
When Branch Unit is the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects. This means that the administrator can create reports that show data from Branch Unit and its related objects by using lookup fields or junction objects.

NEW QUESTION # 166
Which two statements are true about Group Membership in Financial Services Cloud?

- A. With Group Membership settings you can define if a Group is the member's primaryGroup.
- B. Group Membership defines the role of the member within the Group.
- C. Group Membership is modeled using the Account-Group Relationship object.
- D. With Group Membership settings you can define who is the primary and who is the secondary member within the Group.

Answer: A,B

Explanation:
Group Membership is a construct in Financial Services Cloud that allows you to define the relationship between a group and its members. You can use Group Membership to specify the following information:
The role of the member within the group, such as Owner, Beneficiary, Trustee, etc.
Whether the group is the primary group for the member, which affects how financial data is rolled up and displayed. Verified References: : Salesforce Financial Services Cloud User Guide, page 38.

NEW QUESTION # 167
Lake Tahoe Bank is migrating customer records from the Individual Model to Person Accounts. Which threesteps 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. Log a case with Salesforce to perform the conversion from the indrvkJual Model to Person Accounts.
- D. Configure your Person Account record types m the Indrvidual Record Type Mapper.
- E. Enable 'Individual to Person Account Migration' in Custom Settings.

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 andData Loader to perform a bulk update operation. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2 :
Salesforce Help Article 3

NEW QUESTION # 168
Which three of the following FSC components can an Admin use to illustrate a customer Relationship and Groups

- A. Related Accounts
- B. Goal to Group Member Mapping
- C. Relationship Map Builder
- D. Actionable Relationship Center
- E. Life Events Component

Answer: C,D

NEW QUESTION # 169
Our Personal Banker Hank Burton wants to encourage his customers to provide required documents for a loan application. He creates Document Checklist Items that help his customers to manage file uploads to speed up loan approval. For which of the following records does Salesforce support Document Checklist Items out of the box? (Choose Three)

- A. Contact
- B. Opportunity
- C. Residential Loan Application
- D. Account
- E. Lead

Answer: B,C,D

Explanation:
The following records support Document Checklist Items out of the box in Financial Services Cloud:
Account: An Account is a record that represents a person or anorganization that has a business relationship with your company. You can use Document Checklist Items to request and track documents from your account holders, such as identity proofs, tax forms, or contracts.
Residential Loan Application: A Residential Loan Application is a record that represents a request for a loan to purchase or refinance a residential property. You can use Document Checklist Items to request and track documents from your loan applicants, such as income statements, credit reports, or property appraisals.
Opportunity: An Opportunity is a record that represents a potential sale or deal for your products or services.
You can use Document Checklist Items to request and track documents from your opportunity owners, such as proposals, quotes,or agreements. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 170
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