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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q141-Q146):

NEW QUESTION # 141

Universal Containers requires that the organization-wide default for opportunities be set to public read/write. However, sales users are complaining that opportunity reports return too many results, making it difficult to find their team's opportunities in the report results.

How can the system administrator address this problem?

- A. Move the opportunity reports into a folder with restricted access
- B. Update the sharing rules to limit user access to certain opportunity
- C. Move the opportunity reports into each user's personal reports
- **D. Use the show filter to filter report results and reduce records returned**

Answer: D

NEW QUESTION # 142

Lake Tahoe Bank's financial advisors are complaining that they can't see an accurate summary of their clients financial data as clients often change households. How can an Admin set up Financial Services Cloud to provide financial advisors with an accurate summary of their client's financial data?

- A. Use Process Builder to create a workflow to summarize data at the Person Account level.
- **B. Set clients financial data to be rolled up using Financial Services Cloud Primary Group.**
- C. Create a roll-up field on the Opportunity object to track client's Financial Account balance and display the summary amount on the Person Account object.
- D. Create a custom object to track client's financial data

Answer: B

Explanation:

Explanation

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. This way, you can get an accurate summary of the client's financial data regardless of how often they change households. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 69.

NEW QUESTION # 143

Not all life events or business milestones apply to every customer. To create a better customer experience, you can hide the life events or business milestones a customer hasn't achieved or is unlikely to achieve in the future.

Which of the following statements are correct?

- **A. When you hide a life event or business milestone type, it doesn't appear on the component until you add an event or milestone of that type.**
- B. The option to hide life event types or business milestone types is not available in the Communities version of the Life Events or Business Milestones component.
- C. Life Events can not be displayed on the Household level of the Account Record
- **D. It is possible to hide Sensitive Life Event or Business Milestone Types in the Insurance Agent Portal.**

Answer: A,D

NEW QUESTION # 144

The support team at Universal Containers wants to be more proactive about renewing support plans with customers. They would like the support representative dedicated to each account to be notified a month before the account's support plan expires.

What should an administrator configure to meet this requirement?

- A. Assignment rule
- B. Auto-Response rule
- **C. Workflow rule**
- D. Escalation rule

Answer: C

NEW QUESTION # 145

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. Enable 'Individual to Person Account Migration' in Custom Settings.
- B. Use a CSV field to map PersonRecordTypeId to the Person Account RecordTypeId and use Data Loader to update Client Records
- C. Configure your Person Account record types in the Individual Record Type Mapper.
- D. Log a case with Salesforce to perform the conversion from the Individual Model to Person Accounts.
- E. Ensure Person Accounts is enabled on the org

Answer: B,C,E

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 # 146

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