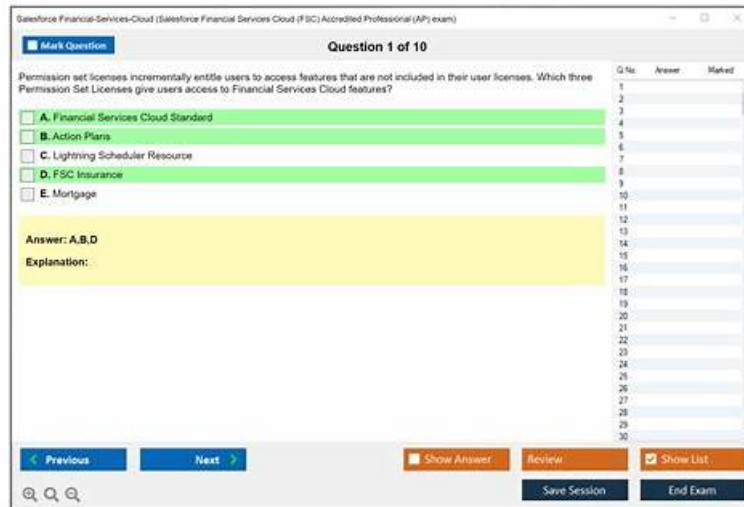


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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q64-Q69):

NEW QUESTION # 64

Which 2 considerations should a SF Admin review before enabling Person Account?

- A. Lightning Flow for FSC is not available for the individual object model
- B. PA cannot be disabled once they were enabled
- C. AppExchange packages will not work if PA are enabled
- D. PA can be enabled and disabled only by contacting SF Support

Answer: A,B

NEW QUESTION # 65

An investment banker is looking to take detailed meeting notes and share them easily with his colleagues while specifying confidentiality and meeting attendees. Which Financial Services Cloud feature should a consultant recommend in this scenario?

- A. Notes
- B. Engagement Interaction
- C. Events
- **D. Interaction Summary**

Answer: D

Explanation:

Interaction Summary is the Financial Services Cloud feature that should be recommended in this scenario.

Interaction Summary is a standard object that represents a summary of an interaction with a client or a group of clients. It allows the user to capture meeting notes, specify confidentiality level, link related records, and associate interaction participants. Interaction Summary can be created from the Interaction Summary component on a record page or from the New Interaction Summary action on a list view or related list.

References: [Interaction Summary Object], [Create an Interaction Summary]

NEW QUESTION # 66

Which three considerations should a Salesforce Administrator be aware of when enabling Person Accounts in FSC?

- A. To transform Individual Records to Person Account Records, Admins can use the Data Loader, and the Insert Operation.
- **B. A Person Account is displayed to users as a single record that has both Account and Contact fields.**
- **C. Customizations to components and triggers need to be reviewed before upgrading to Person Accounts.**
- **D. A Person Account is displayed to users as a single record that has both Household and Contact fields.**
- E. Once Person Accounts are enabled in a Salesforce Org, they can't be disabled.

Answer: B,C,D

NEW QUESTION # 67

Which of these statements are true for Rollups in Financial Services Cloud?

- A. Activities can not be rolled up on the activity timeline at group/household level.
- B. Rollups are done at both the client and group levels
- **C. All financial accounts information, such as account balances are calculated and summarized at the Financial Account Summary level**

Answer: C

NEW QUESTION # 68

Rachel is the primary member of the Adams household hired a new attorney. What type of relationship should the Wealth Advisor create in Financial Services Cloud for Rachel and her attorney before assigning the reciprocal role of "Attorney"?

- **A. Create a Contact-Contact Relationships between the primary member of the Adams Household and the attorney.**
- B. Create an Account-Contact relationship between the Adams Household and the attorney.
- C. Create an Account-Account Relationship between the Addams Family Trust and the attorney.
- D. Create an Account-Account relationship between the Adams Household and the attorney

Answer: A

Explanation:

Explanation

To create a relationship between Rachel and her attorney before assigning the reciprocal role of "Attorney", the Wealth Advisor

should create a Contact-Contact Relationship between the primary member of the Adams Household and the attorney. A Contact-Contact Relationship is a junction object that links two contacts or individuals and defines their relationship with each other². By using Contact-Contact Relationship, the Wealth Advisor can capture Rachel's extended network of relationships with people outside of her household.

Verified References: 2

NEW QUESTION # 69

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