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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q92-Q97):

NEW QUESTION # 92

Personal Banker Hank Burton is questioning his Referral Score shown in Salesforce Financial Services Cloud. When is the Referral Score updated?

- A. The Referral Score updated when a referral is assigned from the queue to a user.
- B. The Referral Score updated when a referral is converted to an Opportunity or closed.
- C. The Referral Score updated when a lead is created using the referral record type.
- **D. The Referral Score updated when an opportunity associated with the Referral is Closed Won**

Answer: D

Explanation:

The Referral Score is updated when an opportunity associated with the Referral is Closed Won. The Referral Score is a metric that measures the quality and quantity of referrals that a user creates or receives. The Referral Score is calculated as the number of referrals converted to opportunities divided by the total number of referrals. The Referral Score is displayed in the Referral Summary component on the user's Home page or record page. The Referral Score is updated whenever a referral is converted to an opportunity or an opportunity is closed as won or lost. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 4

NEW QUESTION # 93

If a client is associated with more than one Household or Group, where will this client's records get rolled up to?

- A. to the Household where the client is the primary member
- B. to the household with the client's primary address
- C. to all the parent households and groups
- **D. to the household selected by the advisor for record rollups.**

Answer: D

Explanation:

If a client is associated with more than one Household or Group, their records will get rolled up to the household selected by the advisor for record rollups. A Household or Group is a construct in Financial Services Cloud that allows you to group related accounts together and view their aggregated financial data and activities. A client can belong to multiple Households or Groups, but only one of them can be selected as their primary Group for record rollups. The primary Group determines which Household or Group will display the client's records in its summary components or related lists. The advisor can select or change the primary Group for a client using the Primary Group field on the client's record page. Verified References: : Salesforce Help Article 6

NEW QUESTION # 94

Jen, the Financial Advisor at Lake Tahoe Wealth Management Company wants to modify a published Action Plan to support an additional task she needs in order to complete an annual review for a client. How should Jen do this?

- **A. Use the Action Plan item feature to add an additional task to a published Action Plan.**
- B. Create an independent Task not related to original Action Plan
- C. Use the 'task creator' tool to create a new task and associate with the existing Action Plan
- D. Contact her Salesforce Administrator and get her to make the change to the Action Plan for her.

Answer: A

Explanation:

To modify a published Action Plan to support an additional task, Jen should use the Action Plan item feature to add an additional task to the published Action Plan. An Action Plan item is a construct in Financial Services Cloud that allows you to add, edit, or delete tasks in an existing Action Plan. You can use Action Plan items to customize your Action Plans according to your specific needs and preferences. Verified References: : Salesforce Help Article 1

NEW QUESTION # 95

Cumulus Insurance has created a Delegated Administrator group for its franchise users to reduce the workload on head office support staff.

Which three functions should be added to the Delegated Administrator group?

- A. Set organization-wide sharing defaults on custom objects.
- B. Modify permission sets.
- **C. Create and manage membership of specified public groups.**
- **D. Assign or remove permission sets for users in their delegated groups.**

- E. Unlock users.

Answer: C,D,E

Explanation:

The following functions should be added to the Delegated Administrator group for its franchise users:

Unlock users, which is a function that allows delegated administrators to unlock users who have been locked out due to incorrect login attempts or password expiration.

Assign or remove permission sets for users in their delegated groups, which is a function that allows delegated administrators to grant or revoke additional permissions for users in their delegated groups by using permission sets.

Create and manage membership of specified public groups, which is a function that allows delegated administrators to create public groups for sharing purposes and add or remove users from those groups.

NEW QUESTION # 96

A wealth advisor is trying to relate a client to their attorney using the Add Contact option on the relationship tree but can't find any reciprocal roles displayed in the related role lookup. What are two reasons for this?

- A. Reciprocal roles have not been created in the org.
- B. Sharing rules have not been set up for reciprocal roles.
- C. The user should be using the Member Relationship button under the Actionable Relationship Center.
- D. The user should be using the Edit Group button to access reciprocal roles.

Answer: A,D

Explanation:

Reference: Configure Reciprocal Roles - Salesforce

Explanation: Some possible reasons why the user can't find any reciprocal roles displayed in the related role lookup are:

Reciprocal roles have not been created in the org. Reciprocal roles are custom objects that define the possible roles for users who need access to Account or Contact records. For example, a reciprocal role can be Advisor, Client, Specialist, or Decision Maker. Each reciprocal role has an associated access level that determines what data fields the user can view or edit. To create reciprocal roles, the administrator needs to do the following steps:

From Setup, open Object Manager.

In the Quick Find box, enter Reciprocal Role, and then select Reciprocal Role.

Click Fields & Relationships, and then select Role Name.

Click New to create a new picklist value for the Role Name field.

Enter a label and a value for the new role, such as Attorney or Client.

Click Save.

The user should be using the Edit Group button to access reciprocal roles. The Add Contact option on the relationship tree only allows the user to add existing contacts as members of a relationship group, such as a household or a business group. The user cannot specify reciprocal roles for the members using this option. To specify reciprocal roles for the members of a relationship group, the user needs to do the following steps:

Click Edit Group on the relationship group record page.

In the Edit Group window, click Member Relationships.

For each member of the group, select a role from the Role picklist and a related role from the Related Role lookup.

Click Save.

NEW QUESTION # 97

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