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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q81-Q86):

### NEW QUESTION # 81

Which three types of Account-Account relationships are displayed in the Actionable Relationship Center?

- A. Accounts & Peers
- B. Accounts & Businesses
- C. Accounts & Members
- D. Accounts & Groups

**Answer: A,B,D**

Explanation:

The following types of Account-Account relationships are displayed in the Actionable Relationship Center (ARC):

Accounts & Businesses: This type of relationship shows the accounts that are related to a business account, such as owners, partners, or beneficiaries. You can use this type of relationship to understand the ownership structure and financial interests of a business account.

Accounts & Peers: This type of relationship shows the accounts that are related to another account by a peer- to-peer relationship, such as friends, colleagues, or associates. You can use this type of relationship to identify potential referrals and cross-selling opportunities from an account's network.

Accounts & Groups: This type of relationship shows the accounts that are related to a group account, such as household members, trust members, or business group members. You can use this type of relationship to view the aggregated financial data and activities of a groupaccount. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : SalesforceHelp Article 4

#### NEW QUESTION # 82

A Salesforce Admin is configuring a new Action Plan Template. One task in that template needs to be picked up by the next available Advisor. What assignment logic should the Admin use when configuring this template task?

- A. Account Team
- B. Action Plan Creator
- C. Specific User
- D. Role
- E. Queues

**Answer: E**

Explanation:

To assign a task to the next available Advisor, the Admin should use Queues as the assignment logic when configuring the template task. Queues are collections of records that can be assigned to multiple users who share workloads and responsibilities. By using Queues, the Admin can ensure that any Advisor who is part of the Queue can pick up the task when they are available.

#### NEW QUESTION # 83

What should a Financial Advisor use to model the relationship between a business contact and a client that is modeled as a person account?

- A. Reciprocal Role
- B. Account-Contact Relationship and the Reciprocal Role
- C. Contact-Contact Relationship and the Reciprocal Role
- D. Account-Account Relationship

**Answer: C**

Explanation:

A Contact-Contact Relationship is a construct in Financial Services Cloud that allows you to model the relationship between two contacts, such as a business contact and a client that is modeled as a person account.

The Reciprocal Role is a field on the Contact-Contact Relationship object that defines how each contact relates to the other. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 64.

#### NEW QUESTION # 84

A consultant is building an agent console for an insurance company using FlexCards to provide a 360-degree view of its customers. An Integration Procedure will be used to retrieve Account, Opportunity, and Contract data. The agent wants the following information displayed:

- \* Account information including account name, phone, and website
- \* Active opportunities related to the Account
- \* Active insurance policies related to the Account
- \* The ability to view and renew policies

How should the consultant design the FlexCards to meet these requirements?

- A. Parent FlexCard with single Child and Card Actions
- B. Parent FlexCard with single Child and multiple Card States
- C. Parent FlexCard with multiple Child and different Card States
- D. Parent FlexCard with multiple Child Flex Cards and Card Actions

**Answer: D**

Explanation:

The consultant should design the FlexCards as follows to meet the requirements:

Parent FlexCard with multiple Child Flex Cards and Card Actions. A Parent FlexCard is a construct in Financial Services Cloud

that allows you to display information from one record in a card-like format on a Lightning page. A Child FlexCard is a construct in Financial Services Cloud that allows you to display information from related records in a card-like format within a Parent FlexCard. A Card Action is a construct in Financial Services Cloud that allows you to perform actions on a record from within a FlexCard, such as edit, delete, renew, or view details. You can use Parent FlexCards, Child FlexCards, and Card Actions to create an agent console that provides a 360-degree view of your customers and enables quick actions on their records. Verified References: : Salesforce Help Article [6] : Salesforce Help Article [7] : SalesforceHelp Article [8]

### NEW QUESTION # 85

What does the Salesforce Admin have to install to provide users access to referral dashboards and reports?

- A. The managed extension package for intelligent Need-Based Referrals and Scoring
- B. Einstein Analytics for Financial Services
- C. Salesforce CRM Dashboards
- D. The unmanaged extension package for Intelligent Need-Based Referrals and Scoring

**Answer: D**

Explanation:

The unmanaged extension package for Intelligent Need-Based Referrals and Scoring provides users access to referral dashboards and reports, as well as referral scoring and routing features.

### NEW QUESTION # 86

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