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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q125-Q130):

NEW QUESTION # 125

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

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

Answer: A

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 # 126

Cumulus Insurance's business processes are quite complex, and steps in the process may vary depending on the information captured.

Which three actions regarding functionality and features should a consultant suggest exploring to help guide Cumulus Insurance users through these processes?

- A. Configure Dynamic Lightning pages.
- B. Use flows to remove the need for complex Lightning pages.
- C. Build custom Lightning pages that correspond to each stage of the business process.
- D. Configure Dynamic Actions for Lightning pages.
- E. Enable In-App Guidance to provide walk-throughs.

Answer: B,D,E

Explanation:

The following actions regarding functionality and features should be suggested to help guide Cumulus Insurance users through their complex business processes:

Configure Dynamic Actions for Lightning pages. Dynamic Actions are a feature that allows you to customize the actions that appear on a Lightning page based on criteria such as record type, field value, device type, or user profile. You can use Dynamic Actions to show or hide actions that are relevant or irrelevant for each stage of the business process, such as creating a case, sending an email, or generating a quote.

Enable In-App Guidance to provide walk-throughs. In-App Guidance is a feature that allows you to create prompts and guided tours that appear within the Salesforce app to help users learn new features, complete tasks, or adopt best practices. You can use In-App Guidance to provide step-by-step guidance for complex business processes, such as onboarding a customer, submitting a claim, or renewing a policy.

Use flows to remove the need for complex Lightning pages. Flows are a tool that allows you to automate business processes and guide users or customers through screens that collect and display information. Flows can have multiple steps and branching logic that ask for different information depending on the responses.

You can use flows to simplify and streamline complex business processes, such as applying for a loan, enrolling in a plan, or changing a beneficiary. Verified References: : Salesforce Help Article [12] : Salesforce Help Article [13] : Salesforce Help Article [14]

NEW QUESTION # 127

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

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

Answer: B,C,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 group account. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 128

Permission set licenses incrementally entitle users to access features that are not included in their user licenses.

Which three Permission Set Licenses give users access to Financial Services Cloud features?

- A. Action Plans
- B. Financial Services Cloud Standard
- C. Lightning Scheduler Resource
- D. FSC Insurance
- E. Mortgage

Answer: A,B,D

Explanation:

The following Permission Set Licenses give users access to Financial Services Cloud features:

Financial Services Cloud Standard: This license enables user access to a license with contractual restrictions for Financial Services Cloud and provides access to core objects such as accounts, contacts, leads, opportunities, cases, activities, reports, dashboards, and custom objects. This license also provides access to some Financial Services Cloud features such as Action Plans, Actionable Relationship Center (ARC), Branch Management, Complaint Management, Data Consumption Framework (DCF), Discovery Framework (DF), Document Generation (DG), Groups (Householding), Intelligent Document Automation (IDA), Intelligent Need-Based Referrals and Scoring (INRS), Referral Management (RM), Relationship Builder (RB), Relationship Groups (RG), Relationship Map (RM), Timeline (TL)1.

Action Plans: This license enables user access to the Action Plans feature, which allows users to create templates for common client processes, such as loan approval, account opening, or financial review. Action Plans can create repeatable tasks and automate the task sequences when executed2.

FSC Insurance: This license enables user access to the Insurance feature, which allows users to manage insurance policies and claims for clients. This license also provides access to some Insurance objects such as Policy, Claim, Coverage Type, Policy Product, Policy Product Offering. Verified References: 12

NEW QUESTION # 129

A Salesforce administrator updating a record page to add a Chatter component to the Action Plan Lightning record page is unable to find the Chatter components for selection.

What is the reason for this?

- A. Feed tracking has to be enabled for the Action Plan object.
- B. Admin users have to be assigned the Action Plans permission set.
- C. Chatter has to be enabled for Action Plans via Chatter settings in setup.
- D. Salesforce is yet to roll out Chatter for the Action Plan object.

Answer: A

Explanation:

Feed tracking has to be enabled for the Action Plan object in order to add a Chatter component to the Action Plan Lightning record page. Feed tracking allows you to see updates on records in Chatter feeds. You can enable feed tracking for custom objects, such as Action Plan, from the setup menu. Once feed tracking is enabled, you can add Chatter components, such as Feed or Publisher, to the record page using the Lightning App Builder. References: [Feed Tracking], [Chatter Components]

NEW QUESTION # 130

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