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Exam : AP-208

Title : Salesforce Accredited Agentforce Financial Services Professional

Version : DEMO

1.An Agentforce Financial Services administrator is setting up a permission set for Actionable Relationship Center.
Which license should the administrator select on the Permission Set setup page?
A. Financial Services Cloud Standard
B. Financial Services Cloud Basic
C. OmniStudio
D. Financial Services Cloud Extension
Answer: A
Explanation:
The appropriate permission-set license for this Actionable Relationship Center configuration is Financial Services Cloud Standard. ARC is a core Agentforce Financial Services capability that provides an interactive graphical representation of relationships among customers, households, businesses, contacts, and other supported records. It is intended to operate within the Financial Services security and licensing framework rather than as an independent OmniStudio-only feature.
When administrators establish ARC access, the permission set must be associated with an appropriate Financial Services license so that users have entitlement to the underlying Financial Services functionality and components. Users without the required Financial Services permission set or associated license can encounter missing components, unavailable actions, or access failures.
ARC itself can build graphs from standard and custom objects, expose record actions, and display relationship information on Lightning record pages. OmniStudio becomes relevant when administrators enhance ARC nodes with FlexCards, but that does not make OmniStudio the base license for the ARC permission set. The Financial Services Standard licensing model provides access to the standard Financial Services components required by users working with core FSC functionality.

2.During the design phase of a project, a consultant needs to provide a financial Services Cloud (FSC) solution for a business requirement that forces a customer to answer a number of assessment questions to complete the embedding process.
What are these things to consider regarding Discovery Framework?
A. Discovery Framework is built based on Salesforce Flow.
B. Discovery Framework forms cannot be deployed to Communications.
C. Discovery Framework can create both standard and hierarchical questions.
D. Discovery Framework creates highly capable forms with integrations and advanced logic.
E. FSC Discovery Framework allows archiving questions.
Answer: C, D, E
Explanation:
Discovery Framework combines a specialized assessment-question data model with OmniStudio to support sophisticated questionnaire-driven onboarding and needs-analysis processes. It is not fundamentally built on Salesforce Flow.
Salesforce supports both independent and hierarchical questions. A question can reference another assessment question as its parent, creating parent-child dependencies and allowing follow-up questions to be organized in a structured hierarchy.
The framework uses OmniStudio to create advanced digital forms. Discovery Framework combines its data model with OmniStudio to manage questionnaire-driven information collection and create digital forms that collect and validate customer information. These forms can include conditional behavior,

integrations, and sophisticated guided logic.
Discovery Framework also supports question lifecycle management through versions. Assessment-question versioning enables administrators to replace or retire prior question content while preserving the historical structures required by previously completed assessments.
Discovery Framework forms are deployable beyond internal Lightning experiences. Activated forms can be exposed through supported digital channels, including Experience Cloud or Communities and other Salesforce experiences.
Therefore, the supported considerations are hierarchical questions, sophisticated OmniStudio forms with advanced logic and integrations, and assessment-question lifecycle or archiving capabilities.

3.Which three processes are part of Claims Management?
A. Reserve Management
B. Payment
C. Quoting
D. Auto Adjudication
E. Underwriting
Answer: A, B, D
Explanation:
Salesforce Insurance Claims Management supports the complete post-loss claims lifecycle, including reserve management, payment processing, and automated adjudication. These processes operate after a covered loss has occurred and are central to evaluating, funding, and settling a claim.
Reserve Management enables adjusters to establish and modify reserves representing expected future claim exposure. The claim workspace consolidates coverages, reserves, loss items, expense items, and other claim financial information so adjusters can assess current and projected financial exposure.
Payment is another core Claims Management process. Adjusters can create payment details and issue payments while Salesforce validates applicable policy limits and updates the corresponding claim-financial records.
Auto Adjudication applies configured rules and policy information to automate claim-processing decisions where appropriate. This reduces manual handling for qualifying claims and supports straight-through processing.
Quoting belongs to the pre-policy acquisition process, while underwriting evaluates risk before coverage is issued. Those functions are part of other insurance lifecycle capabilities rather than Claims Management. Claims Management therefore centers on Reserve Management, Payment, and Auto Adjudication.

4.Which of the following objects do support Group-Level Rollups?
A. Tasks
B. Alerts
C. Financial Accounts
D. Action Plans
E. Opportunities
Answer: A, C, E
Explanation:
Agentforce Financial Services group-level record rollups aggregate qualifying records belonging to

members of a Primary Group so advisors can see consolidated household information. Salesforce's supported-object matrix includes Tasks, Financial Accounts, and Opportunities.
Financial Accounts are surfaced through financial-account components at the group level. Once group rollups are enabled and the financial account is associated with a member of the Primary Group, the household-level experience can present the aggregated account information.
Tasks are displayed within the Activities related list at the group level. This enables advisors to review relevant work and interaction activity across household members from the household context.
Opportunities are also supported and appear in the Household Opportunities related list. Opportunities can require additional configuration in managed-package implementations, such as adding the appropriate value to the Rollup__c field on Account Contact Relationship.
Alerts and Action Plans are not included in the documented group-level record-rollup object set tested here. They have their own data structures and visibility mechanisms.
Thus, the supported choices are Tasks, Financial Accounts, and Opportunities.

5.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 multiple Children and different Card States
B. Parent FlexCard with single Child and Card Actions
C. Parent FlexCard with single Child and multiple Card States
D. Parent FlexCard with multiple Child Flex Cards and Card Actions
Answer: D
Explanation:
A parent FlexCard with multiple child FlexCards and Card Actions provides the most appropriate architecture because the console must present several logically distinct data groups while also supporting user interaction.
The parent FlexCard can represent the overall customer context and display high-level Account information. Separate child FlexCards can then present active Opportunities and active insurance policies. This modular design keeps the information organized while allowing each child card to focus on its own data subset.
The requirement to view and renew policies makes Card Actions important. OmniStudio FlexCard actions can navigate users to Salesforce records, launch OmniScripts, update data sources, invoke processes, or perform other record-oriented operations. A policy card can therefore provide an action to open the selected policy and another action to launch a guided renewal process.
Card States are useful when the visual presentation of a card must change according to conditions, but they do not replace separate child components where different collections such as opportunities and policies must be displayed simultaneously.
An Integration Procedure can retrieve the required Account, Opportunity, and Contract data and return a

consolidated JSON structure to the FlexCard architecture. The parent and child FlexCards render their respective portions while Card Actions supply the policy-view and renewal functionality.