

# [2025] Salesforce Financial-Services-Cloud Questions: Fosters Your Exam Passing Abilities



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The Actual4Labs is one of the top-rated and renowned platforms that has been offering real and valid Salesforce Financial Services Cloud (FSC) Accredited Professional (Financial-Services-Cloud) exam practice test questions for many years. During this long time period countless Salesforce Financial Services Cloud (FSC) Accredited Professional (Financial-Services-Cloud) exam candidates have passed their dream Financial-Services-Cloud certification and they are now certified Salesforce professionals and pursuing a rewarding career in the market.

Salesforce Financial-Services-Cloud platform is constantly evolving, and as such, it is important for financial professionals to stay up-to-date with the latest developments. One way to demonstrate expertise in this area is by becoming a Salesforce Financial Services Cloud (FSC) Accredited Professional. This accreditation is awarded to individuals who have demonstrated their knowledge and proficiency in using the platform to manage financial services.

The FSC Accredited Professional exam covers a wide range of topics, including financial services industry knowledge, Salesforce Financial-Services-Cloud platform capabilities, and best practices for implementing financial services solutions on the Salesforce platform. Financial-Services-Cloud exam consists of 60 multiple-choice questions and is timed at 90 minutes. The passing score for the exam is 68%, and individuals who pass the exam will earn the FSC Accredited Professional credential.

>> **Financial-Services-Cloud Trustworthy Practice** <<

## Quiz 2025 Financial-Services-Cloud: Efficient Salesforce Financial Services Cloud (FSC) Accredited Professional Trustworthy Practice

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## Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q166-Q171):

### NEW QUESTION # 166

For which three objects are Rollup By Lookup (RBL) summaries are available?

- A. Contacts
- B. Life Events

- C. Assets and Liabilities
- D. Claims
- E. Financial Accounts

**Answer: A,C,E**

Explanation:

Rollup By Lookup (RBL) summaries are available for the following objects:

Financial Accounts, which are records that represent financial products or services that a client owns or uses<sup>1</sup>.

Assets and Liabilities, which are records that represent the value of what a client owns or owes<sup>1</sup>.

Contacts, which are records that represent individuals who are associated with an account<sup>3</sup>.

#### **NEW QUESTION # 167**

Which of the following objects do support Group-Level Rollups?

- A. Alerts
- B. Tasks
- C. Action Plans
- D. Opportunities
- E. Financial Accounts

**Answer: C,D,E**

Explanation:

The following objects do support Group-Level Rollups:

Financial Accounts: You can use Group-Level Rollups to display the total balance, total market value, and total cost basis of all the financial accounts that belong to a group.

Action Plans: You can use Group-Level Rollups to display the number of action plans, the number of completed action plans, and the completion percentage of all the action plans that are associated with a group.

Opportunities: You can use Group-Level Rollups to display the total amount, expected revenue, and weighted amount of all the opportunities that are related to a group. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 80. : Salesforce Financial Services Cloud Implementation Guide, page 81.: Salesforce Financial Services Cloud Implementation Guide, page 82.

#### **NEW QUESTION # 168**

A financial services company is migrating a legacy customer relationship management system to Financial Services Cloud (FSC). The company is requesting that its consulting partner introduce specific customer interaction features mapped to its business processes.

What should the consultant consider when introducing the FSC features?

- A. If there is a business process for taking detailed notes for client meetings and adding action items, the Action Plan component is recommended to use.
- B. If there is a business process for showing common interests and needs across the company's clients, the Interaction Summaries component is recommended to use.
- C. If there is a business process for tracking the customer life events and milestones, and timely reminding of opportunities, the Action Plan component is recommended to use.
- D. If there is a business process for limiting role-based data visibility, the Interaction Summaries component is recommended to use.

**Answer: A**

Explanation:

Reference: Action Plans in Financial Services Cloud for Admins | Salesforce Trailhead Explanation: Action Plans are a feature of Financial Services Cloud that allow users to create and execute repeatable tasks based on predefined templates. Action Plans can help streamline and standardize business processes, such as onboarding new clients, conducting annual reviews, or resolving service requests. Action Plans can also capture detailed notes for client meetings and add action items to follow up.

#### **NEW QUESTION # 169**

Cumulus Cloud Bank is asking the consultant to explain some tools available to integrate Salesforce into several of its back-end/core systems.

Which three capabilities should a consultant recommend?

- A. Industry Integration Solutions with the MuleSoft Anypoint Platform
- B. OmniStudio Integration Procedures
- C. OmniStudio DataRaptors
- D. Data Consumption Framework
- E. Data Processing Engine

**Answer: A,B,C**

Explanation:

Salesforce offers various tools and capabilities to integrate Financial Services Cloud with external systems, such as core banking, insurance, or mortgage platforms. Some of the tools and capabilities that a consultant can recommend are:

**Industry Integration Solutions with the MuleSoft Anypoint Platform:** These are prebuilt integration solutions that leverage the MuleSoft Anypoint Platform to connect Financial Services Cloud with common industry systems, such as Fiserv, FIS, Jack Henry, and Guidewire<sup>1</sup>. These solutions enable bi-directional data synchronization, orchestration, and transformation between Salesforce and the external systems<sup>2</sup>.

**OmniStudio Integration Procedures:** These are reusable components that define the logic and sequence of steps for integrating data from external sources into Financial Services Cloud<sup>3</sup>. Integration procedures can be triggered by events, such as a button click or a record update, and can invoke other components, such as DataRaptors or OmniScripts<sup>4</sup>.

**OmniStudio DataRaptors:** These are data transformation components that can extract, load, and manipulate data from various sources, such as Salesforce objects, REST or SOAP web services, or CSV files<sup>5</sup>. DataRaptors can be used to map data between different formats, perform calculations or validations, or create or update records in Financial Services Cloud<sup>6</sup>.

References:

Industry Integration Solutions

MuleSoft Anypoint Platform

OmniStudio Integration Procedures

Create an Integration Procedure

OmniStudio DataRaptors

Create a DataRaptor

#### NEW QUESTION # 170

Which of these statements is true for the Person Accounts Model? (2 correct answers)

- A. Person Accounts can not be related to cases, tasks, or calls.
- B. The Person Account model uses the standard Account object to hold all of the details about a person. The Account object has been extended with custom fields, record types, and more.
- C. The Person Account record type can be used when a client is a business or an institution.
- D. The Person Account represents all aspects of the person. Data includes personhood details, such as birth date or tax ID number, and dealings with your organization, such as review frequency or service tier

**Answer: B,D**

#### NEW QUESTION # 171

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