

# Your Ultimate Resource Actual of Salesforce Financial-Services-Cloud Questions



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Salesforce Financial-Services-Cloud (FSC) Accredited Professional Exam is designed for professionals who want to demonstrate their expertise in using Salesforce's Financial Services Cloud. Salesforce Financial Services Cloud (FSC) Accredited Professional certification is ideal for professionals who want to work in the financial services industry and want to demonstrate their knowledge of Salesforce's specialized tools and features in this domain.

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## Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q132-Q137):

### NEW QUESTION # 132

A Financial Services Cloud (FSC) administrator wants to create a new FSC permission set that includes the Access Interest Tags for Financial Services Cloud permission.

Which two permission sets should be cloned to create this new permission set and give access to interest tags?

- A. FSC Extension permission set
- B. FSC Standard permission set
- C. FSC Foundations permission set
- D. FSC Basic permission set

**Answer: A,C**

Explanation:

#### Explanation

The Access Interest Tags for Financial Services Cloud permission is included in two permission sets that are provided by FSC:

FSC Foundations permission set: This permission set grants access to the core features of FSC, such as financial accounts, account groups, households, goals, referrals, and interest tags<sup>7</sup>.

FSC Extension permission set: This permission set grants access to additional features of FSC that extend beyond the core functionality, such as action plans, relationship groups, relationship maps, client tasks, client notes, and interest tags<sup>8</sup>.

To create a new FSC permission set that includes the Access Interest Tags for Financial Services Cloud permission, either of these permission sets can be cloned and modified as needed.

#### References:

FSC Foundations Permission Set

FSC Extension Permission Set

#### NEW QUESTION # 133

Lake Tahoe Bank is rolling out FSC and the VP of IT is concerned about the cost of the licenses. The system admin recommends using licenses for users that need only limited access to FSC features. Which FSC permission set license enables user access to a license with contractual restrictions for FSC and can be used to grant restricted access to users like Bank Tellers?

- A. FSC Extension
- B. FSC Standard
- C. Client segmentation
- **D. FSC Basic**

**Answer: D**

#### NEW QUESTION # 134

A private equity company with only one administrator wants to upgrade Financial Services Cloud (FSC) from a Sales Cloud Unlimited Edition (UE) org. The company decided to install FSC greenfield on a new org to minimize the transfer of existing tech debt. In preparation for data migration, the administrator has been exporting backup files of the current org for a month.

What should the administrator do as part of the preparation for the data migration process?

- **A. To start, the administrator can run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration.**
- B. As a dry run, the administrator can test this process via a data export request from the primary sandbox to the existing Sales Cloud UE org.
- C. The administrator can ask the business manager on the investment bank team to review the file directly.
- D. After running the backup data export manually for 2 weeks, the administrator can schedule this job to run weekly every Sunday to review the file on Mondays at the start of the week for data comparisons/analysis.

**Answer: A**

#### Explanation:

As part of the preparation for the data migration process, the administrator should run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration. This is a best practice for data migration in Salesforce that allows the administrator to identify the data they want to migrate, create templates for the data, prepare the destination org, and validate the data<sup>2</sup>. By running a daily backup data export for a week, the administrator can capture any changes or updates in the data and compare them with previous exports. By continuing to run this job weekly until they are ready for data migration, the administrator can ensure that they have the most recent and accurate data to migrate into Financial Services Cloud. Verified

Reference: 2

#### NEW QUESTION # 135

Which Salesforce Financial Services Cloud feature enables financial advisors to track and manage client accounts?

- A. Client onboarding
- B. Opportunity management
- **C. Financial accounts management**
- D. Performance reporting

**Answer: C**

Explanation:

Financial accounts management is a Salesforce Financial Services Cloud feature that enables financial advisors to track and manage client accounts. A financial account is any account managed by a financial institution, such as a bank, an insurance company, or an investment firm. Financial Services Cloud supports many kinds of financial accounts, such as checking accounts, savings accounts, mortgages, credit cards, investment accounts, insurance policies, and more<sup>3</sup>. Financial advisors can use Financial Services Cloud to view, create, update, and delete financial accounts for their clients, as well as link them to other objects, such as households, goals, referrals, or opportunities<sup>4</sup>.

References:

Financial Accounts

Manage Financial Accounts

### NEW QUESTION # 136

The Actionable Relationship Center can display which of the following relationships in the tree pane? Select 3 answers.

- **A. Account-Account Relationships**
- **B. Up to 5 Related Lists for a non-Account Record**
- C. Any Related List for the selected object record
- D. Up to 5 Related Lists for an Account Record
- **E. Account-Contact Relationships**

**Answer: A,B,E**

### NEW QUESTION # 137

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