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Quiz 2026 Financial-Services-Cloud: Perfect Salesforce Financial Services

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The FSC Accredited Professional Certification Exam consists of 60 multiple-choice questions that must be completed within 90 minutes. Financial-Services-Cloud Exam covers a wide range of topics, including the Salesforce Financial Services Cloud, financial planning, investment management, and more. Candidates must score a minimum of 65% to pass the exam.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q149-Q154):

NEW QUESTION # 149

A bank needs help with many of its processes taking too long to complete. Many of its challenges are due to issues with handoffs between teams. The challenges also include users transferring control to the wrong person or team or forgetting to transfer it at all. Which two Financial Services Cloud capabilities should help address these challenges?

- A. Roll-up Summaries
- B. Omni Scripts
- C. Action Plans
- D. Financial Accounts

Answer: B,C

Explanation:

Reference: Action Plans in Financial Services Cloud for Admins | Salesforce Trailhead and [OmniScript Overview | Vlocity Developer Docs] 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 assign tasks to different users or teams, set deadlines and priorities, and track progress and status.

Omni Scripts are a feature of Vlocity that allow users to create and run guided interactions based on predefined scripts. Omni Scripts can help automate and simplify complex workflows, such as opening new accounts, applying for loans, or updating personal information. Omni Scripts can also integrate with other systems, capture user inputs, perform calculations, and display dynamic content.

NEW QUESTION # 150

What feature does a Salesforce Administrator need to enable so users can see all the referrals for the members of a group?

- A. Referral Scoring
- B. Referral Group Process Builder
- C. Group Member Referrals
- D. Referrals Rollups

Answer: D

NEW QUESTION # 151

Which information can you find under the Relationships Tab? - (Check the 3 that apply)

- A. Related accounts - accounts not directly included in the primary household.
- B. Related contacts that play a role in the financial world of the client (i.e a family lawyer)
- C. Summary information about Total Financial Accounts. This includes total assets under management at your firm, the Category (i.e. Platinum), client interactions, including the last interaction and the next interaction scheduled in the future.
- D. Primary household Information, including the members of the household and how the household is related to other groups.

Answer: A,B,D

NEW QUESTION # 152

Cumulus Cloud Bank needs help onboarding new customers. The business process requires updating the Know Your Customer (KYC) document checklist and performing internal tasks in a predefined order.

However, during an internal audit, it was found that bankers often miss these tasks and still move to the next stage of the onboarding process.

What should a consultant recommend?

- A. Create an after-save trigger to generate reminder tasks.
- **B. Utilize Action Plan and Action Plan Template.**
- C. Utilize Chatter notifications for reminders.
- D. Utilize Financial Services Cloud flag Templates to flag missing items.

Answer: B

Explanation:

To help onboarding new customers, the consultant should recommend using Action Plan and Action Plan Template. Action Plan is a feature in Financial Services Cloud that allows you to automate and standardize common business processes or service requests, such as customer onboarding, account opening, or loan origination. You can use Action Plan to create templates that define the tasks, owners, and deadlines for each process or request. You can also use Action Plan to enforce task dependencies and completion criteria, so that bankers cannot skip or miss any tasks or move to the next stage of the onboarding process without meeting the requirements. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION # 153

What are the challenges Financial Institutions face? (Select all that apply)

- **A. Rising class of new competitors**
- B. Not enough data
- **C. Regulatory compliance**
- **D. Isolated data and outdated systems**

Answer: A,C,D

NEW QUESTION # 154

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