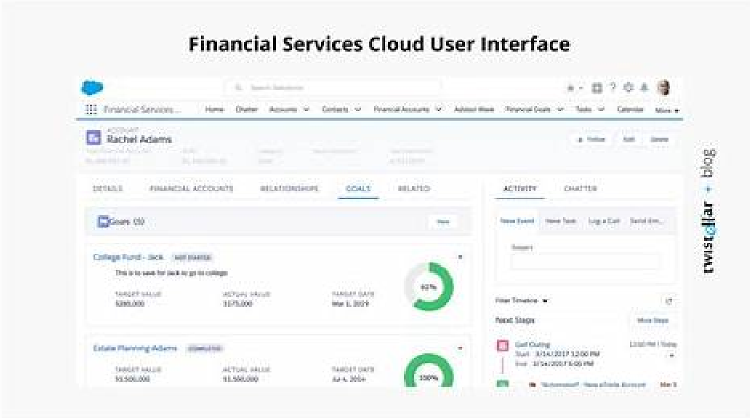
# Financial-Services-Cloud Updated CBT, Passing Financial-Services-Cloud Score

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## Quiz 2026 Salesforce Financial-Services-Cloud Accurate Updated CBT

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## Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q30-Q35):

**NEW QUESTION # 30**
An investment bank is implementing Financial Services Cloud (FSC) to manage the deal pipeline. Each opportunity has confidential information that the deal team members must only view. In addition, each member needs the ability to take and share notes directly within Salesforce with others on the team.
Which three FSC features should be part of the solution design?

- A. Interaction Summaries
- B. Financial Deal Management
- C. Profiles
- D. Complianthata Sharing

- E. Sharing Rules

**Answer: A,B,E**

Explanation:
The following FSC features should be part of the solution design for managing confidential deal information and notes sharing among deal team members:
Financial Deal Management: Financial Deal Management is a feature in Financial Services Cloud that allows you to track and manage complex deals that involve multiple parties, products, and stages. You can use Financial Deal Management to store confidential deal information such as deal name, amount, status, or participants. You can also use Financial Deal Management to associate opportunities, products, or tasks with a deal.

**NEW QUESTION # 31**
What benefits do Flows for Financial Services Cloud offer to support customer onboarding? (Choose Two)

- A. Flows enable customers to schedule appointments via customer communities, motxie apps. or websites.
- B. Flows enable customers to schedule appointments via customer communities, mobile apps. or websites.
- C. Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to * navigate to different screens.
- D. Flows systematically capture and visualize important customer Life Events to drive more personalized and need-based engagements.
- E. Flows enable customers to book appointments with the nght specialist at the right time and place through self-service scheduling

**Answer: A,C**

Explanation:
Flows provide step-by-step guidance for common service requests, such as change of address, or change of beneficiary, without the need to navigate to different screens. Flows can simplify and streamline the customer onboarding process by automating tasks and collecting information in an easy and intuitive way. You can use Flows to create service requests that capture the customer's details and update the related records in one place.
Flows enable customers to schedule appointments via customer communities, mobile apps. or websites. Flows can integrate with Experience Cloud sites, mobile apps, or websites to provide self-service options for customers. You can use Flows to create appointment scheduling forms that allow customers to book appointments with the right specialist at the right time and place. Verified References: : Salesforce Help Article 3 : Salesforce Help Article 4

**NEW QUESTION # 32**
Lake Tahoe Bank, an existing Salesforce customer, is planning to implement Financial Services Cloud. Their Salesforce Admin is considering whether to use a new Salesforce org or upgrade the existing org. Which three of the considerations below indicate that a new Salesforce org is the better choice9

- A. Data migration is a big concern The current org has a large amount of data and the Bank wants to minimize data migration efforts.
- B. The bank has limited redesign opportunities for business capabilities.
- C. The bank wants to use this project as an opportunity to retire customization
- D. Existing business capabilities and processes can be redesigned to deliver a higher business impact
- E. The current implementation is using a product-centric view and the bank wants to move to a customer-centric view.

**Answer: C,D,E**

Explanation:
The following considerations indicate that a new Salesforce org is the better choice for implementing Financial Services Cloud:
The bank wants to use this project as an opportunity to retire customization. A new org will allow the bank to start fresh and avoid carrying over unnecessary or outdated customization that may conflict with Financial Services Cloud features or best practices.
The current implementation is using a product-centric view and the bank wants to move to a customer-centric view. A new org will allow the bank to adopt the Financial Services Cloud data model, which is designed to provide a holistic view of the customer and their relationships, goals, financial accounts, activities, and interactions.
Existing business capabilities and processes can be redesigned to deliver a higher business impact. A new org will allow the bank to leverage the Financial Services Cloud capabilities, such as Action Plans, Relationship Groups, Rollup By Lookup, Service

Processes, etc., to optimize their business processes and enhance their customer experience. Verified Reference: : Salesforce Help Article 6

**NEW QUESTION # 33**
The Salesforce Admin at Lake Tahoe Bank is implementing Financial Services Cloud and wants to roll up customer data at the client and group levels. What functionality can Rollup By Lookup (RBL) provide for this requirement?

- A. Rollup By Lookup (RBL) displays associated records for Financial Accounts. Financial Goals, and Opportunities.
- B. An RBL rule displays summary calculations of financial account information, such as account balances.
- C. Rollups for multiple joint owners are not supported
- D. RBL calculations can not be disabled when importing data into your Salesforce org.
- E. When you edit a financial account record or primary Group membership, the Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the client and Group levels.

**Answer: A,B,E**

**NEW QUESTION # 34**
A financial services company wants to use the Financial Services Cloud Person Account data model. The company needs two Person Account record types, one to represent Individual customer and one to represent Individual independent advisors that send referrals.
What should the administrator do to set up the new record types?

- A. Create a record type on the Contact object.
- B. Create custom fields on the Person Account object.
- C. Enable "Use Person Account" custom setting.
- D. Configure Individual Record Type Mapper" custom metadata.

**Answer: D**

Explanation:
To set up the new record types for Person Accounts, the administrator should configure Individual Record Type Mapper custom metadata. The Individual Record Type Mapper is a custom metadata type in Financial Services Cloud that defines how records are created when using certain features, such as Einstein Data Capture or Salesforce Inbox. The Individual Record Type Mapper maps Person Account record types to Individual record types, so that when a new Individual record is created from an email or calendar event, it automatically creates a corresponding Person Account record with the same record type. To configure Individual Record Type Mapper custom metadata, you need to go to Setup > Custom Metadata Types > Individual Record Type Mapper > Manage Records and create a new record for each Person Account record type and its matching Individual record type. Verified Reference: : Salesforce Help Article [8] : Salesforce Help Article [9]

**NEW QUESTION # 35**
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