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Salesforce Financial-Services-Cloud (FSC) Accredited Professional Exam is an essential certification for professionals who specialize in the finance industry. Financial-Services-Cloud exam is designed to test key competencies in managing customer relationships, managing financial products and services, and understanding industry regulations. Salesforce Financial Services Cloud (FSC) Accredited Professional certification is crucial for those who want to excel in their roles as financial advisors or managers.

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In addition to the recognition that comes with achieving Salesforce Financial Services Cloud Accredited Professional status, there are also tangible benefits. These include access to exclusive resources and training opportunities, as well as increased job opportunities and salary potential. With the financial services industry becoming increasingly reliant on technology, the demand for professionals with expertise in Salesforce Financial-Services-Cloud is only expected to grow.

## Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q156-Q161):

### NEW QUESTION # 156

The Salesforce Admin at Lake Tahoe Bank is implementing Financial Services Cloud and wants to rollup financial data at the client and group levels? What functionality can Rollup By Lookup (RBL) provide for this requirement?

- A. Rollups for multiple joint owners are not supported.
- **B. 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.**
- **C. Rollup By Lookup (RBL) displays associated records for Financial Accounts, Financial Goals and Opportunities.**
- D. RBL calculations can't be disabled when importing data into your Salesforce org.

- E. An RBL rule displays summary calculations of financial account information, such as account balances.

**Answer: B,C,E**

#### NEW QUESTION # 157

Person accounts store information about individual people by combining certain account and contact fields into a single record. Using the Object Manager, on which Object do you configure the Person Account Page Layout?

- A. The Person Account Object
- B. The Person Account Record Type on the Account Object
- C. The Person Account Record Type on the Contact Object

**Answer: A**

#### NEW QUESTION # 158

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

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

**Answer: B,C,D**

Explanation:

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 # 159

Financial Services Cloud (FSC) contains a number of custom objects to model a client's financial information, and each object can be configured to appear as tabs in your org. For example, if a consultant wanted to create a financial goal for a customer, they could use the Financial Goal object in FSC.

What are three objects in FSC?

- A. Billing
- B. Financial Holding
- C. Revenue
- D. Inheritance
- E. Financial Goal

**Answer: B,C,E**

Explanation:

Financial Services Cloud contains a number of custom objects to model a client's financial information, and each object can be configured to appear as tabs in your org. Some of the custom objects are:

Financial Goal: An object that represents a client's financial objective, such as saving for retirement, buying a house, or paying off debt. A financial goal has fields to store information, such as name, amount, target date, priority, and status.

Financial Holding: An object that represents a holding in an investment account, such as a security, a mutual fund, or a bond. A financial holding has fields to store information, such as symbol, shares, price, gain/loss, and market value.

Revenue: An object that represents revenue generated from a client's financial accounts, such as an increase in stock value, a dividend payment, or an interest income. A revenue has fields to store information, such as type, amount, date, and source.

References:

Financial Services Cloud Associated Objects

Learn About the Financial Services Cloud Data Model

### NEW QUESTION # 160

It has been determined that integration with an external system is required, as the data needed by a wealth management client resides in another system. This data will be sent from the external system via an API, and Salesforce needs to be configured in preparation for the data.

Which two items should be configured?

- A. A flow to get the data into Salesforce
- **B. Objects and fields to store the data**
- C. A Lightning web component to restrict data from users
- **D. An integration User and Integration Profile to enable the connection**

**Answer: B,D**

Explanation:

Explanation

To integrate with an external system, Salesforce needs to have objects and fields that can store the data that will be sent from the external system via an API. These objects and fields should match the data structure and format of the external system as much as possible. Additionally, Salesforce needs to have an integration user and an integration profile that can enable the connection between Salesforce and the external system. The integration user is a dedicated user account that has access to the API and can perform data operations on behalf of other users. The integration profile is a custom profile that defines the permissions and settings for the integration user.

### NEW QUESTION # 161

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