Quiz AP-208 - Financial Services Cloud Accredited Professional–Professional Reliable Test Braindumps

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Question Salesforce AP-208 Explanations, Exam AP-208 Question

The competition in the Salesforce field is rising day by day and candidates around the globe are striving to validate their capabilities. Because of the rising competition, candidates lack opportunities to pursue their goals. That is why has launched the Salesforce AP-208 Exam to assess your capabilities and give you golden career opportunities. Getting a Financial Services Cloud Accredited Professional (AP-208) certification after passing the Salesforce AP-208 exam is proof of the capabilities of a candidate.

Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q136-Q141):

NEW QUESTION # 136
Which three of these statements are true for Rollup By Lookup (RBL) in Financial Services Cloud?

- A. Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules
- B. Person Accounts need to be enabled in order to use the Rollup by Lookup functionality.
- C. RBL rules do not require a lot of processing power.
- D. The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels
- E. An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances.

Answer: A,D,E

Explanation:
The following statements are true for Rollup By Lookup (RBL) in Financial Services Cloud:
An RBL (Rollup By Lookup) rule displays summary calculations of financial account information, such as account balances. You can use RBL rules to aggregate financial account data across different levels of client relationships.
The Rollup By Lookup (RBL) configuration updates the corresponding RBL summaries at the diem and group levels. You can use RBL configuration to define which fields are rolled up and howthey are calculated for each diem and group type.
Salesforce does not recommend or provide support for creation or customization of Financial Services Cloud RBL rules. RBL rules are complex and require extensive testing and validation. If you need to create or customize RBL rules, you should contact a certified Salesforce partner or consultant. Verified References: :
Salesforce Financial Services Cloud Implementation Guide, page 75. : Salesforce Financial Services Cloud Implementation Guide, page 76. : Salesforce Financial Services Cloud Implementation Guide, page 77.

NEW QUESTION # 137
Which three insurance processes are managed by the Policy Administration component?

- A. Underwriting
- B. Approvals
- C. Commissions
- D. Payments
- E. Endorsements

Answer: B,D,E

Explanation:
The following insurance processes are managed by the PolicyAdministration component:
Payments: Payments are the amounts that a policyholder pays to an insurance company for a policy or a claim. You can use the Policy Administration component to manage the payment schedules, methods, and statuses for your policiesand claims. You can also use the Policy Administration component to integrate with external payment systems and track the payment transactions and balances for your policies and claims.
Approvals: Approvals are the processes that an insurance company follows to review and authorize a policy or a claim. You can use the Policy Administration component to configure and automate the approval workflows, rules, and criteria for your policies and claims. You can also use the Policy Administration component to assign approvers, send notifications, and monitor the approval statuses and histories for your policies and claims.
Endorsements: Endorsements are the changes or modifications that a policyholder requests or an insurance company makes to a policy. You can usethe Policy Administration component to manage the endorsement requests, types, and statuses for your policies. You can also use the Policy Administration component to update the policy details, coverages, premiums, or terms based on the endorsements for your policies.
Verified References: : Salesforce Help Article [9] : Salesforce Help Article [10] : Salesforce Help Article [11]

NEW QUESTION # 138
A financial services company needs to add new values for how a customer can be related to a financial account. Which object/field should the administrator add new values on?

- A. Object: Financial Account; Field: Joint Owner
- B. Object: Account-Account Relationship; Field: Related Role
- C. Object: Financial Account Role; Field: Role
- D. Object: Financial Account; Field: Primary Owner

Answer: C

Explanation:
To add new values for howa customer can be related to a financial account, the administrator should add new values on the Role field of the Financial Account Role object. The Financial Account Role object is a junction object that links a contact or an individual to a financial account and defines their role or relationship with that account. The Role field is a picklist field that specifies the role of the contact or individual for the financial account, such as owner, beneficiary, trustee, or custodian. By adding new values on the Role field of the Financial Account Role object, the administrator can create new categories of financial account relationships for customers.

NEW QUESTION # 139
Which three referral metrics aretracked with custom components included in Financial Services Cloud?

- A. My Approved Referrals
- B. My Top Referrers
- C. Expressed interests
- D. Web to Lead Referrals
- E. Referrals Assigned to me

Answer: B,C,E

Explanation:
The following referral metrics are tracked withcustom components included in Financial Services Cloud:
Expressed interests: This metric shows the number of referrals that have a specific expressed interest, such as a mortgage, a credit card, or a checking account. You can use this metric to understandthe customer needs and interests that generate the most referrals.
My Top Referrers: This metric shows the top referrers who have created referrals for you, ranked by the number of referrals and the conversion rate. You can use this metric to identify andappreciate your best sources of business.
Referrals Assigned to me: This metric shows the number of referrals that are assigned to you and their status, such as New, In Progress, or Closed. You can use this metric to monitor and manage your referral pipeline and prioritize your follow-up actions.
Verified References: : Salesforce Financial Services Cloud User Guide, page 40. : Salesforce Financial Services Cloud User Guide, page 41. : Salesforce Financial Services Cloud User Guide, page 42.

NEW QUESTION # 140
Which three objects should a Financial Services Cloud administrator use when planning to use the Mortgage Data Model to integrate with external Loan Origination and Customer Onboarding applications to accurately track the pipeline?

- A. Case
- B. Assets & Liabilities
- C. Account
- D. Financial Account
- E. Opportunity

Answer: C,D,E

Explanation:
The following objects should be used when planning to use the Mortgage Data Model to integratewith external Loan Origination and Customer Onboarding applications to accurately track the pipeline:
Opportunity: An Opportunity is a standard object that represents a potential sale or deal for your products or services. You can use the Opportunity object to track and manage the stages, amounts, probabilities, and expected revenue of your deals. You can also use the Opportunity object to associate products, price books, quotes, contracts, orders, or assets with your deals.
Account: An Account is a standard object that represents a person or an organization that has a business relationship with your company. You can use the Account object to store information about your customers, such as name, address, phone number, website, industry, or rating. You can also use the Account object to associate contacts, opportunities, activities, cases, or notes with your customers.
Financial Account: A Financial Account is a custom object in Financial Services Cloud that represents a financial product or service that is owned by an account holder or related to an account holder's financial goal. You can use the Financial Account object to store information about your customers' financial accounts, such as type, balance, status, or interestrate. You can also use the Financial Account object to associate financial transactions, financial account roles, or financial goals with your customers' financial accounts.
Verified References: : Salesforce Help Article [6] : Salesforce Help Article [7] : Salesforce Help Article [8]

NEW QUESTION # 141
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