Detailed AP-208 Study Plan, New AP-208 Exam Online

Daily Study Planner
Studies Planner

Date: August 6

WAKE UP AT	SLEEP AT		TODAY'S SUBJECTS
6:00 AM	10:00 PM		1. Data Analytics
HOURS TO STUDY			2. Business
PLANNED	8 hours		3. Social Entrepreneurship
ACTUAL	10 hours		4. Operation Optimization

TIMETABLE			DEADLINES
6:00	Preparation		1. Data Findings, August 7
7:00	Breakfast, Shower		2. Business Reports, August 8
8:00	Data Analytics		3. Social Entrepreneurship Output, August 10
9:00	Data Analytics		4. Recommendation Paper, August 10
10:00	Break		5. Proposal for Operation Optimization, August 12
11:00	Data Analytics		**GOALS**
12:00	Lunch		1. Complete sorting data from last week
13:00	Complete Business Reports		2. Analyze data
14:00	Complete Business Reports		3. Form conclusions and recommendations
15:00	Complete Business Reports		4. Finish 3 business reports
16:00	Break		5. Complete the social entrepreneurship output
17:00	Study Social Entrepreneurship		6. Make an outline for the operation optimization proposal
18:00	Study Social Entrepreneurship		**STUDY PROGRESS**
19:00	Dinner		1. Done organizing and analyzing data
20:00	Study Operation Optimization		2. Finished 2 out of 3 business reports
21:00	Study Operation Optimization		3. Half-way through the social entrepreneurship output
22:00	Rest		4. Finished writing outlines for the proposal

New Salesforce AP-208 Exam Online | New AP-208 Exam Topics

Salesforce Financial Services Cloud Accredited Professional Sample

Questions (Q146-Q151):

NEW QUESTION # 146

Which three related lists are visible within the Actionable Relationship Center associated with the Account object?

- A. Client Financial Goals
- B. HouseholdFinancial Accounts
- C. Cases
- D. Financial Holdings
- E. Notes and Attachments

Answer: A,B,C

Explanation:

Reference: View Preconfigured ARCGraphs (Original ARC) - Salesforce

Explanation: The Actionable Relationship Center (ARC) is a feature of FSC that allows users to view their customers' relationships in an easy-to-navigate graph. ARC helps users understand relationships between people, groups, accounts, contacts, opportunities, deals, and other records. ARC also allows users to view and manage related lists for each node in the graph.Related lists are collections of records that are related to another record by a lookup or master-detail relationship.

The related lists that are visible within ARC depend on the node type and configuration. For example, for an Account node with Householdrecord type, some of the related lists that are visible are:

Household Financial Accounts: This related list shows all the financial accounts that are related to the household members by either ownership or beneficiary relationships.

Cases: This related list shows all the cases that are related to the household account or its members.

Client Financial Goals: This related list shows all the financial goals that are related to the household account or its members.

Other related lists that can be visible fordifferent node types include:

Contacts

Opportunities

Financial Deals

Interaction Summaries

Action Plans

Notes

Attachments

NEW QUESTION # 147

Lake Tahoe Bank branch manager Sue Barry wants to encourage all Personal Bankers to use Action Plans to capture repeatable tasks and automate the task sequences, improving collaboration and productivity. Which three of the following statements about Action Plans are true?

- A. Action Plans can be used to schedule appointments with the Bankers
- B. Action Plans require a monthly license fee per user
- C. Action Plans can be used to automatically assign task owners and deadlines for specific client engagements
- D. Action Plans make it easy to create reports and dashboards, so you can monitor progress and ensure compliance
- E. When you work with Action Plans, you first create Action Plan Templates

Answer: C,D,E

Explanation:

The following statements about Action Plans are true:

When you work with Action Plans, you first create Action Plan Templates, which are reusable sets of tasksthat define a common clientprocess1.

Action Plans make it easy to create reports and dashboards, so you can monitor progress and ensure compliance. Users can use standard report types or custom report types to create reports on action plans, action plan templates, action plan items, action plan itemtemplates, and action plan itemowners1.

Action Plans can be used to automatically assign task owners and deadlines for specific client engagements. Users can specify task owners by using assignment logic such as specific user, role, queue, action plancreator, or account team1. Verified References: 1

NEW QUESTION # 148

Cumulus Bank is migrating its CRM software from a legacy application to Salesforce Financial Services Cloud (FSC). The bank hired Salesforce Professional Services to configure/deploy the new Salesforce FSC org and migrate data.
Which order should a consultant follow when performing the data migrations?

- A. Individuals, then Financial Accounts, then Financial Account Roles, then Financial Account Transactions
- B. Individuals,then Financial Account Roles, then Financial Accounts, then Financial Account Transactions
- C. Financial Accounts, then Financial Account Transactions, thenVinancial Account Roles, then Individuals
- D. Financial Accounts, then Financial Account Roles, thenIndividuals, then Financial Account Transactions

Answer: A

Explanation:
The order that the consultant should follow when performing the data migrations is Individuals, then Financial Accounts, then Financial Account Roles, then Financial Account Transactions. This order ensures that the data dependencies and relationships are maintained and that the data integrity and quality are preserved. By migrating Individualsfirst, the consultant can create the records that represent the customers of the bank. By migrating Financial Accounts next, the consultant can create the records that represent the financial products or services that the customers own or use. By migrating Financial Account Roles next, the consultant can create the records that link the individuals to the financial accounts and define their roles or relationships with those accounts. By migrating Financial Account Transactions last, the consultant can create the records that represent the transactions or activities that occur on the financial accounts.

NEW QUESTION # 149

Cumulus Insurance has a franchise business model with a large number of franchisees who operate independently but report to regional managers who are Cumulus employees. The company would like the franchise owners and their employees to have access to the Cumulus Salesforce Financial Services Cloud (FSC) instance. The company plans to use the Role Hierarchy and sharing rules to implement this. What should the architect at Cumulus Insurance be aware of for this solution?

- A. The administrator can define up to 300 total sharing rules for each object.
- B. Salesforce FSC only allows 1,024 public groups.
- C. Franchise users will need to switch their browsers to a platform that supports Lightning Web Components.
- D. Franchise users canhave multiple roles in the hierarchy.

Answer: A

Explanation:
The architect at Cumulus Insurance should be aware of the limitation that the administrator can define up to
300 total sharing rules for each object when using the Role Hierarchy and sharing rules to implement the franchise business model. Sharing rules are a way of granting additional access to records based on criteria, such as record owner, role, or field values. The Role Hierarchy is a way of organizing users into a hierarchy that reflects the reporting structure of the company. The Role Hierarchy and sharing rules can be used together to control the access and visibility of records for different users in Financial Services Cloud. However, there is a limit of 300 sharing rules per object, which means that the administrator may need to use other methods, such as public groups or manual sharing, to grant access to records beyond this limit.
References:
[Sharing Rules]
[Role Hierarchy]
[Sharing Rule Limits]

NEW QUESTION # 150

To access Financial Services Cloud Lightning Components "My Domain" must be enabled. How does the System Admin accomplish this?

- A. Open a case withSalesforce Support
- B. Enable Communities
- C. Go to Custom Settings and edit the Industries Settings
- D. Register a subdomam using the My Domain wizard and then deploy it

Answer: D

Explanation:

My Domain is a feature in Salesforce that allows you to create a subdomain for your org. You need to enable My Domain to access Financial ServicesCloud Lightning Components, such as Actionable Relationship Center, Relationship Map, Life Events & Business Milestones, etc. To enable My Domain, you need to do the following:
Register a subdomain using the My Domain wizard in Setup > My Domain.
Deploy itto your users after testing it in your sandbox or developer org. Verified References: : Salesforce Help Article [7]

NEW QUESTION # 151

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