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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q58-Q63):

### NEW QUESTION # 58

To access all Financial Services Cloud (FSC) functionalities available out of the box, a consultant must install the FSC Managed

Package and the Unmanaged Extension Packages.

Which two functionalities are included in the FSC Unmanaged Extension Packages?

- A. Field sets that configure how fields display in the client and household profiles
- B. Custom objects to track Financial Accounts and Household
- C. Predefined list views of clients and households
- D. The Commercial Banking dashboard

**Answer: A,D**

Explanation:

Reference: Financial Services Cloud Packages

Explanation: Financial Services Cloud functionality is available from two packages: the managed package and the unmanaged extension packages. The managed package contains most of the Financial Services Cloud functionality, such as custom fields and objects, list views and profiles of clients and households, and administrative configurations. The unmanaged extension packages provide additional functionality that is not included in the managed package, such as:

The Commercial Banking dashboard: This is a dashboard that provides insights into commercial banking activities and performance, such as loan portfolio health, deposit growth, referral pipeline, and customer satisfaction. The Commercial Banking dashboard is included in the unmanaged commercial banking extension package.

Field sets that configure how fields display in the client and household profiles: These are field sets that determine which fields are displayed in different sections of the client and household profiles, such as Client Overview, Household Overview, Client Details, Household Details, etc. The field sets are included in the unmanaged extension package.

#### NEW QUESTION # 59

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

**Answer: C**

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 Individuals first, 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 # 60

A financial services company wants to track different categories of financial accounts in its org. Relationship managers must be able to see all of these financial accounts in one place on the customer's Account record page grouped by categories.

Which three steps should an administrator take to configure the Financial Account object and the Account Lightning record page to meet the design?

- A. Create Account lookup fields on the Financial Account object to link the Financial Accounts to an Account.
- B. Configure Financial Account record types to match the required categories.
- C. Add the Financial Account List component to the Account Lightning record page.
- D. Configure the Financial Account List components for each required category.
- E. Create a custom picklist on the Financial Account object to track the Typ

**Answer: A,D,E**

Explanation:

The following considerations should be included when configuring the report with branch management reportable objects: Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are available for creating reports with Branch Unit Related Records. These are standard report types that allow users to create reports that show data from Banker, Branch Unit, Opportunity, Account, Lead, Contact, and Branch Unit Related Record objects.

The reportable objects include Banker, Branch Unit, Branch Unit Related Records, and Branch Unit Customer. These are custom objects that are part of the branch management feature in Financial Services Cloud. Banker is an object that represents a banker or an employee who works at a branch unit.

Branch Unit is an object that represents a physical location where bankers provide services to customers.

Branch Unit Related Record is an object that represents a record that is related to a branch unit, such as an opportunity, an account, a lead, or a contact. Branch Unit Customer is an object that represents a customer who has a relationship with a branch unit.

When Branch Unit is the primary object, the administrator can select Branch Unit Customers or Branch Unit Related Records as related objects. This means that the administrator can create reports that show data from Branch Unit and its related objects by using lookup fields or junction objects.

### NEW QUESTION # 61

A financial institution has custom security and visibility rules where certain users need to see specific records even though they are not typically engaged in that Account. This includes legal and compliance members who must be engaged for particular deals. Which Financial Services Cloud capability provides the ability to accommodate this request?

- A. Custom Sharing Rules
- B. Interaction Summaries
- C. **Compliant Data Sharing**
- D. Business Rules Engine

**Answer: C**

Explanation:

The Financial Services Cloud capability that provides the ability to accommodate the request of sharing specific records with certain users who are not typically engaged in that account is Compliant Data Sharing.

Compliant Data Sharing is a feature that allows users to share records with other users based on criteria such as record type or field value. Users can create sharing rules for objects such as account, contact, individual, financial account role, opportunity participant role, or case team role. By using Compliant Data Sharing, the financial institution can share records with legal and compliance members who must be engaged for particular deals based on a field value that indicates the deal type.

### NEW QUESTION # 62

Which two limitations should a Salesforce Administrator consider before enabling Person Accounts?

- A. **Creating a client record via Salesforce Inbox is not supported.**
- B. **Person Accounts cannot be disabled once they were enabled**
- C. AppExchange packages will not work if Person Accounts are enabled
- D. Person Accounts can be enabled and disabled only by contacting Salesforce Support

**Answer: A,B**

Explanation:

The following limitations should be considered before enabling Person Accounts in Financial Services Cloud:

Person Accounts cannot be disabled once they were enabled. Enabling Person Accounts is an irreversible action that affects your data model and user interface. You should carefully evaluate your business needs and test the functionality in a sandbox or developer org before enabling it in production.

Creating a client record via Salesforce Inbox is not supported. Salesforce Inbox is a feature that allows you to access Salesforce data and actions from your email application. However, you cannot use Salesforce Inbox to create a client record as a Person Account. You can only create a client record as an Individual Model record using Salesforce Inbox. Verified References: : Salesforce Help Article 4 : Salesforce Help Article 5

### NEW QUESTION # 63

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