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## Financial Services Cloud Accredited Professional easy pass guide & AP-208 training pdf & Financial Services Cloud Accredited Professional torrent vce

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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q130-Q135):

NEW QUESTION # 130

Which three permission sets grant access or extend permissions for record alerts in Financial Services Cloud (FSC)?

- A. FSC Standard permission set
- B. OmniStudio Admin permission set
- C. FSC Basic permission set
- D. FSC Foundations permission set
- E. OmniStudio User permission set

**Answer: A,D,E**

Explanation:

Record alerts are a feature of Financial Services Cloud that let users create and display alerts on record pages to highlight important information or actions. Record alerts are based on OmniStudio, a low-code platform for building digital experiences in Salesforce. To access or extend permissions for record alerts in Financial Services Cloud, users need to have one of the following permission sets:

FSC Standard permission set: This permission set grants access to the core features of Financial Services Cloud, including record alerts. Users with this permission set can view and create record alerts on supported objects, such as accounts, contacts, financial accounts, and opportunities<sup>1</sup>.

FSC Foundations permission set: This permission set grants access to the common features of Financial Services Cloud that are shared across subverticals, such as retail banking, wealth management, and insurance. Users with this permission set can view and create record alerts on supported objects<sup>2</sup>.

OmniStudio User permission set: This permission set grants access to the OmniStudio features, such as OmniScripts, DataRaptors, Integration Procedures, and Record Alerts. Users with this permission set can view and create record alerts on any object that has the Record Alert component enabled<sup>3</sup>.

References:

FSC Standard Permission Set

FSC Foundations Permission Set

OmniStudio User Permission Set

#### NEW QUESTION # 131

A commercial loan due diligence process is handled by multiple individuals at Lake Tahoe Bank. Lake Tahoe Bank wants an easy way for managers to distribute the work, to understand the % completion of the due diligence process per client and report on the performance of the department to show possible bottlenecks.

What FSC feature can Lake Tahoe Bank use to track this process?

- A. Flows
- B. Workflow Rules/Process Builder
- C. Action Plans
- D. Apex Triggers on the task object

**Answer: C**

Explanation:

Again, Action Plans are a feature that can help users track and manage common client processes. For a commercial loan due diligence process, users can create an Action Plan Template with tasks such as verifying income, checking credit history, appraising collateral, etc. Users can also assign different task owners and deadlines for each task to distribute the work and monitor the progress. Users can also use dashboards and reports to view the % completion of the due diligence process per client and report on the performance of the department to show possible bottlenecks.

#### NEW QUESTION # 132

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; Field: Primary Owner
- D. Object: Financial Account Role; Field: Role

**Answer: D**

Explanation:

To add new values for how a 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 # 133

A consultant advising Cumulus Bank wants to ensure that the bank is compliant with Identity Verification Regulations when customers contact the bank.

Which two features should a consultant leverage to design this business process?

- A. Screen Flows
- B. Process Builder
- C. Discovery Framework
- D. Omni Studio

**Answer: A,B**

Explanation:

Process Builder and Screen Flows are two features that can be used to design a business process for identity verification. Process Builder is a tool that allows you to automate business processes by creating workflows that trigger actions based on certain criteria. Screen Flows are a type of flow that guide users through a series of screens to collect and update data. You can use Process Builder to launch a Screen Flow when a customer contacts the bank, and use the Screen Flow to capture and verify the customer's identity information.

References: [Process Automation], [Screen Flows]

### NEW QUESTION # 134

While working for an insurance client implementing Financial Services Cloud, an API integration between Salesforce and a risk control system has been configured. The consultant is asked to ensure the correct profiles and permissions were set up for this connection. Which two steps should the consultant take?

- A. Create a dedicated Integration User.
- B. Assign the integration user to the System Administrator profile.
- C. Create a new custom profile and ensure API Only is selected.
- D. Update the System Administrator profile to include the API Only User.

**Answer: A,C**

Explanation:

To ensure the correct profiles and permissions for an API integration between Salesforce and a risk control system, the consultant should do the following steps:

Create a dedicated Integration User that will be used to authenticate and authorize the API calls between Salesforce and the risk control system. The Integration User should have a unique username, password, and security token that are not shared with other users or systems. The Integration User should also have the minimum permissions and access settings required to perform the integration tasks.

Create a new custom profile and ensure API Only is selected. The API Only option restricts the user from logging in to the Salesforce user interface, but allows the user to access the Salesforce API. The custom profile should also have the appropriate object permissions, field-level security, record types, page layouts, and other settings that are relevant for the integration. The custom profile should be assigned to the Integration User.

### NEW QUESTION # 135

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With the unemployment rising, large numbers of people are forced to live their job. It is hard to find a high salary job than before. Many people are immersed in updating their knowledge. So people are keen on taking part in the AP-208 exam. As you know, the

