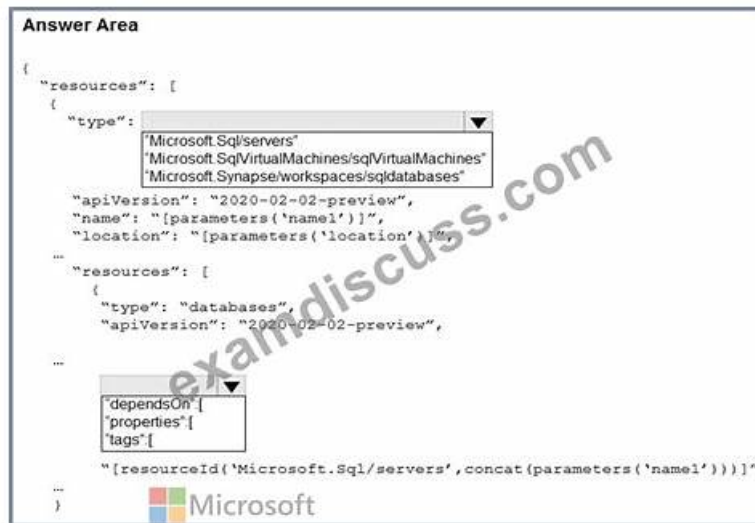


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Preparing for Financial Services Cloud Accredited Professional (AP-208) exam can be a challenging task, especially when you're already juggling multiple responsibilities. People who don't study with updated Salesforce AP-208 practice questions fail the test and lose their resources. If you don't want to end up in this unfortunate situation, you must prepare with actual and Updated AP-208 Dumps of TrainingQuiz. At TrainingQuiz, we believe that one size does not fit all when it comes to Salesforce AP-208 exam preparation.

Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q77-Q82):

NEW QUESTION # 77

A wealth management firm is looking to start tracking its clients' hobbies for marketing purposes in Salesforce. Which Financial Services Cloud feature is most suitable for this?

- A. Topics
- B. Interest Tags
- C. Engagement Topics
- D. Alerts

Answer: B

Explanation:

The Financial Services Cloud feature that is most suitable for tracking clients' hobbies for marketing purposes is Interest Tags. Interest Tags are features that allow users to add tags to contacts or individuals based on their interests or preferences. Users can create custom interest tags or use predefined ones from FSC. By using Interest Tags, the wealth management firm can capture its clients' hobbies and use them for marketing segmentation or personalization.

NEW QUESTION # 78

A Financial Services Cloud (FSC) administrator is assigning permission set licenses to users, including personal bankers. Which permission set license is recommended for this set of users?

- **A. FSC Standard permission set license**
- B. FSC Extension permission set license
- C. FSC Basic permission set license
- D. FSC Foundations permission set license

Answer: A

Explanation:

Reference: Financial Services Cloud Permission Set Licenses - Salesforce Explanation: Permission set licenses are a way to grant additional permissions and access settings to users based on their job function or role. Permission set licenses can extend the functionality of the user's existing license type without changing it. Financial Services Cloud provides four permission set licenses that correspond to different user personas and use cases:

FSC Foundations: This permission set license grants access to basic Financial Services Cloud features, such as Client Segmentation, Relationship Groups, Relationship Map, Financial Accounts, Financial Goals, and Financial Summary. This permission set license is suitable for users who need to view and manage client data and relationships, such as personal bankers or service representatives.

FSC Basic: This permission set license grants access to advanced Financial Services Cloud features, such as Action Plans, Interaction Summaries, Interaction Participants, Financial Deals, Financial Deal Participants, and Record Alerts. This permission set license is suitable for users who need to track and execute client interactions and transactions, such as advisors or specialists.

FSC Extension: This permission set license grants access to additional Financial Services Cloud features that are not included in the other permission set licenses, such as Household Rollups and Compliant Data Sharing. This permission set license is suitable for users who need to perform complex calculations or comply with data regulations, such as analysts or compliance managers.

FSC Standard: This permission set license grants access to all Financial Services Cloud features that are included in the other permission set licenses. This permission set license is suitable for users who need full access and functionality of Financial Services Cloud, such as super users or administrators.

NEW QUESTION # 79

Personal Banker Hank Burton is questioning his Referral Score shown in Salesforce Financial Services Cloud. When is the Referral Score updated?

- **A. The Referral Score updated when an opportunity associated with the Referral is Closed Won**
- B. The Referral Score updated when a referral is assigned from the queue to a user.
- C. The Referral Score updated when a referral is converted to an Opportunity or closed.
- D. The Referral Score updated when a lead is created using the referral record type.

Answer: A

Explanation:

The Referral Score is updated when an opportunity associated with the Referral is Closed Won. The Referral Score is a metric that measures the quality and quantity of referrals that a user creates or receives. The Referral Score is calculated as the number of referrals converted to opportunities divided by the total number of referrals. The Referral Score is displayed in the Referral Summary component on the user's Home page or record page. The Referral Score is updated whenever a referral is converted to an opportunity or an opportunity is closed as won or lost. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 4

NEW QUESTION # 80

A new custom object has been created, and the records of this object will be created through integration with another system. What should a consultant do to ensure the data is loading into the correct fields in Financial Services Cloud?

- A. Use a CSV file with the data created and use Data Loader to map to the correct field
- B. Ensure custom metadata is configured and each custom metadata record details where the data will be sent
- C. Create a junction object between the external system and the new customer object where the data will reside
- D. Utilize a field mapping file with the external system (allocation and the corresponding field in Salesforce)

Answer: D

Explanation:

To ensure the data is loading into the correct fields in Financial Services Cloud, the consultant should utilize a field mapping file with the external system allocation and the corresponding field in Salesforce. A field mapping file is a file that specifies how fields from an external system map to fields in Salesforce. By using a field mapping file, the consultant can ensure that the data from the new custom object is imported into the correct fields in Financial Services Cloud and avoid any data loss or inconsistency.

NEW QUESTION # 81

During the delivery stage of a Financial Services Cloud (FSC) implementation, a consultant needs to think about how to utilize FSC-related objects. Which three things should the consultant consider when adopting such objects?

- A. Role Hierarchy-based sharing can be disabled for the Financial Deal object but can't be disabled for the Opportunity object.
- B. Both the Financial Deal object and the Opportunity object support Compliant Data Sharing.
- C. Interaction Summary is an enhancement of the standard Activity object. FSC implementations should use Interaction Summary as a replacement for the Activity object.
- D. In a household, each household member is modeled as a Contact, and the household is modeled as an Account.
- E. In a household, each of the household members is modeled as a Person Account and the household is modeled as an Account.

Answer: A,B,D

Explanation:

Reference: Set Up Clients, Households, and Relationships, Compliant Data Sharing in Financial Services Cloud | Salesforce Trailhead, Track Client Interactions - Salesforce

Explanation: Some considerations when adopting FSC-related objects are: In a household, each household member is modeled as a Contact, and the household is modeled as an Account. A household is a type of relationship group that represents a group of clients who have a direct relationship with one another and shared financials, such as spouses and their dependent children. A household is modeled as an Account record with a custom record type of Household. Each household member is modeled as a Contact record that is related to the household Account. A household can also have related accounts and contacts that are not part of the household, but are associated with it for some reason.

Both the Financial Deal object and the Opportunity object support Compliant Data Sharing. Compliant Data Sharing (CDS) is a feature of FSC that allows granular control over access to sensitive data in Account and Opportunity objects. CDS can help financial services companies comply with regulations and policies that restrict data visibility based on user roles. CDS can also be enabled for the Financial Deal object, which is a custom object that represents a business opportunity or transaction with a client. The Financial Deal object can be used instead of or in addition to the Opportunity object, depending on the business needs.

Interaction Summary is an enhancement of the standard Activity object. FSC implementations should use Interaction Summary as a replacement for the Activity object. Interaction Summary is a custom object that captures the details of a client interaction, such as a meeting, a call, or an email. Interaction Summary can be linked to other FSC objects, such as Financial Accounts, Financial Goals, Financial Deals, or Relationship Groups. Interaction Summary can also have participants, which are records that represent the people or groups involved in the interaction.

NEW QUESTION # 82

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