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>> **Reliable AP-208 Test Review** <<

2026 Salesforce Unparalleled AP-208: Reliable Financial Services Cloud Accredited Professional Test Review

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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q155-Q160):

NEW QUESTION # 155

An asset management firm that is moving to Salesforce from its old CRM wants to be able to bring over its client data on drivers' licenses and passports. 55m 058 Which Financial Services Cloud object should a consultant recommend?

- **A. Identification Document**
- B. Document Checklist Item
- C. Identity Document
- D. Received Document

Answer: A

Explanation:

Identification Document is the Financial Services Cloud object that should be recommended for storing client data on drivers' licenses and passports. Identification Document is a standard object that represents a document that verifies a person's identity, such as a driver's license, passport, or national ID card. You can create identification document records for individual clients and link them to their person accounts. You can also store information such as document type, number, issue date, expiration date, and country of issuance.

References: [Identification Document Object], [Manage Identification Documents]

NEW QUESTION # 156

An insurance company wants to create a car insurance quote process for its website. The process should include the following functionality:

- * The user has to enter contact and address information.
 - * The user has to enter the driver's age and the car model and year.
 - * The process should calculate an insurance quote based on the data the customer provided and save the offer to the client's record.
- Which three OmniStudio tools should the consultant use to design a solution that meets these requirements?

- A. OmniScripts
- B. Business Rules Engine
- C. Integration Procedures
- D. FlexCards
- E. APEX Code

Answer: A,B,C

Explanation:

The following OmniStudio tools should be used to design a solution that meets the requirements for creating a car insurance quote process for the website:

OmniScripts, which are tools that allow users to create guided, interactive, and intuitive scripts that capture data and execute actions. By using OmniScripts, the consultant can create a script that guides the user through the car insurance quote process and captures the contact and address information, the driver's age, and the car model and year.

Integration Procedures, which are tools that allow users to orchestrate data and actions across multiple systems using RESTful APIs. By using Integration Procedures, the consultant can create a procedure that calls the core system service to calculate an insurance quote based on the data provided by the user and returns the quote to the OmniScript.

Business Rules Engine, which is a tool that allows users to define business logic and validation rules using natural language expressions. By using Business Rules Engine, the consultant can create rules that validate the data entered by the user and enforce any business policies or conditions for the car insurance quote process.

NEW QUESTION # 157

A private equity company with only one administrator wants to upgrade Financial Services Cloud (FSC) from a Sales Cloud Unlimited Edition (UE) org. The company decided to install FSC greenfield on a new org to minimize the transfer of existing tech debt. In preparation for data migration, the administrator has been exporting backup files of the current org for a month. What should the administrator do as part of the preparation for the data migration process?

- A. As a dry run, the administrator can test this process via a data export request from the primary sandbox to the existing Sales Cloud UE org.
- B. After running the backup data export manually for 2 weeks, the administrator can schedule this job to run weekly every Sunday to review the file on Mondays at the start of the week for data comparisons /analysis.
- C. To start, the administrator can run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration.
- D. The administrator can ask the business manager on the investment bank team to review the file directly.

Answer: C

Explanation:

As part of the preparation for the data migration process, the administrator should run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration. This is a best practice for data migration in Salesforce that allows the administrator to identify the data they want to migrate, create templates for the data, prepare the destination org, and validate the data. By running a daily backup data export for a week, the administrator can capture any changes or updates in the data and compare them with previous exports. By continuing to run this job weekly until they are ready for data migration, the

administrator can ensure that they have the most recent and accurate data to migrate into Financial Services Cloud. Verified
References: 2

NEW QUESTION # 158

How are identification documents, other assets, liabilities, goals, and revenue modeled, in an existing Financial Services Cloud org using the individual account model?

- A. Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the Account object.
- B. An administrator is logged in to Data Loader with their own credentials to insert new Business Account records into their Salesforce environment. They forget to specify the Account Owner field in the import file.
- C. Document, Note, and Attachment objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the person account.
- **D. Assuming there are no other issues, what should happen when the administrator uploads the import file?
The Attachment object is used to represent other assets, liabilities, and goals. In the individual model, these attachments are related to the Account object.**

Answer: D

Explanation:

In an existing Financial Services Cloud org using the individual account model, custom objects are used to represent other assets, liabilities, and goals. These objects are related to the Account object via lookup relationships. For example:

The Other Asset object is used to represent non-financial assets owned by an account holder, such as real estate properties, vehicles, or jewelry.

The Other Liability object is used to represent non-financial liabilities owed by an account holder, such as mortgages, loans, or taxes.

The Financial Goal object is used to represent financial objectives pursued by an account holder, such as retirement planning, education funding, or debt reduction. Verified References:

1: Salesforce Help Article [10]

2: Salesforce Help Article [11]

3: Salesforce Help Article [12]

NEW QUESTION # 159

Lake Tahoe Bank wants to onboard a client digitally and without asking the client for information that the bank already has on file. The process has multiple steps and can have branching (conditional) logic that asks for different information depending on the responses. Which Salesforce feature should be used for this digital onboarding process?

- **A. Flows**
- B. Action Plans
- C. Actionable Relationship Center
- D. Financial Goals

Answer: A

Explanation:

The Salesforce feature that should be used for the digital onboarding process is Flows. Flows are a tool that can automate business processes and guide users or customers through screens that collect and display information. Flows can have multiple steps and branching logic that ask for different information depending on the responses. Flows can also integrate with existing data and prefill fields with information that the bank already has on file, reducing the need to ask the customer for redundant information. Flows can be embedded in Lightning pages, Experience Cloud sites, mobile apps, or websites to provide a seamless and engaging digital onboarding experience. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION # 160

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