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Salesforce Financial Services Cloud Accredited Professional AP-208 Prüfungsfragen mit Lösungen (Q149-Q154):

149. Frage

Lake Tahoe Bank branch manager is asking the Salesforce Administrator for improvements in Salesforce to speed up Loan Approval Processing. The Salesforce Admin is considering using Action Plans. Which 3 process improvements can be delivered using Action Plans?

- A. When you create an action plan from a template for a specific target record, items that have no assigned user are assigned to the owner of that " target record.
- B. Action Plans can automatically schedule the next appointment with the Advisor.
- C. Action Plans enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client processes.
- D. Action Plans create repeatable tasks and automate the task sequences when executed
- E. Action Plans can speed up the collection of a list of documents needed for the loan application

Antwort: A,C,D

Begründung:

Action Plans are a feature that allows users to create templates for common client processes, such as loan approval, account opening, or financial review. Action Plans can create repeatable tasks and automate the task sequences when executed. When an action plan is created from a template for a specific target record, such as an account or an opportunity, items that have no assigned user are assigned to the owner of that target record.

Action Plans can also enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client processes.

150. Frage

Our Personal Banker Hank Burton wants to encourage his customers to provide required documents for a loan application. He creates Document Checklist Items that help his customers to manage file uploads to speed up loan approval. For which of the following records does Salesforce support Document Checklist Items out of the box? (Choose Three)

- A. Opportunity
- B. Contact
- C. Lead
- D. Account
- E. Residential Loan Application

Antwort: A,D,E

Begründung:

The following records support Document Checklist Items out of the box in Financial Services Cloud:

Account: An Account is a record that represents a person or an organization that has a business relationship with your company. You can use Document Checklist Items to request and track documents from your account holders, such as identity proofs, tax forms, or contracts.

Residential Loan Application: A Residential Loan Application is a record that represents a request for a loan to purchase or refinance a residential property. You can use Document Checklist Items to request and track documents from your loan applicants, such as income statements, credit reports, or property appraisals.

Opportunity: An Opportunity is a record that represents a potential sale or deal for your products or services.

You can use Document Checklist Items to request and track documents from your opportunity owners, such as proposals, quotes, or agreements. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

151. Frage

Which three processes are part of Claims Management?

- A. Reserve Management
- B. Payment
- C. Underwriting
- D. Quoting
- E. Auto Adjudication

Antwort: A,B,E

Begründung:

The following processes are part of Claims Management:

Auto Adjudication, which is a process that allows claims to be processed automatically without human intervention, based on predefined rules and criteria. Auto adjudication can improve the efficiency and accuracy of claims processing and reduce operational costs.

Reserve Management, which is a process that involves estimating and setting aside funds for future claims payments. Reserve management can help insurers manage their cash flow and solvency and comply with regulatory requirements.

Payment, which is a process that involves disbursing funds to claimants or providers after a claim has been approved. Payment can involve different methods, such as check, electronic funds transfer, or debit card.

Payment can affect the customer satisfaction and retention rate of insurers.

152. Frage

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

- A. 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.
- 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. Custom objects are used to represent other assets, liabilities, and goals. In the individual model, these objects are related to the Account object.
- D. 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.

Antwort: A

Begründung:

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]

153. Frage

Which 3 out of the box capabilities come with Financial Services Cloud Lead & Referral Management?

- A. Assigning a Referral
- B. Round Robin Referral Routing
- C. Referral Automated Approvals
- D. Accepting a Referral
- E. Referral Conversion

Antwort: A,D,E

verfügbar: <https://drive.google.com/open?id=1PeKF1ug4Xusl2xziCyENfS7NnC9MqTv4>