

Salesforce.201-Commercial-Banking-Functional.v2023-07-10.q54

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NEW QUESTION: 1

True or False? Document Manager requires permission sets in order for users to upload documents.

- A. True
- B. False

Answer: A (LEAVE A REPLY)

NEW QUESTION: 2

Which items must be created in order to configure a team key? (Select Two)

- A. Role
- B. Role
- C. Loan field
- D. Email alert
- E. Email template
- F. Email template

Answer: B,E (LEAVE A REPLY)

NEW QUESTION: 3

What Collateral MGMT Placeholders are generated in Loan Docman when Collateral is pledged?

- A. Those flagged with "Import Me" checkbox
- B. Those marked as in file
- C. 5 Oldest Placeholders
- D. All Placeholders
- E. Only Approved Documents

Answer: E ([LEAVE A REPLY](#))

NEW QUESTION: 4

The nCino UI provides the users with all of the following, except:

- A. A Streamlined navigation and presentation of data by keeping all relevant information in one view pane (you are only presented with the information you need to know)
- B. An intuitive layout that reduces learning curve in adapting to and using the layout effectively
- C. Consistent experience across devices
- D. A 1-to-1 replacement of native Salesforce UI functionality

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 5

Covenant Compliance records are generated until:

- A. All Associated Loans are in the Complete Stage
- B. A user deactivates the Covenant Management record
- C. All associated Loans are in the Booked Stage
- D. the Status is changed

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 6

True or False? When you log a call, you are also given the ability to create a follow-up task on the same page, if needed.

- A. False
- B. True

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 7

What tab should an admin navigate to for configuring Document Manager?

- A. Reports
- B. DM Admin
- C. nCino Administration
- D. Docman Configuration Tool Suite
- E. Home

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 8

True or False: Collateral Type is optional.

- A. True
- B. False

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 9

The 'Decline Loan' button is at the top of the _____ page.

- A. Contact
- B. Relationship
- C. Lead
- D. Loan

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 10

The Customer Information (CIP information - i.e. date of birth, drivers license) for an Individual Relationship is stored here.

- A. Connections
- B. Leads
- C. Overview
- D. Contacts

Answer: D ([LEAVE A REPLY](#))

NEW QUESTION: 11

True or False? On a Change Memo, you have to manually go back into the Loan record to update any new changes to fields like terms, rate, amount, etc.

- A. False
- B. True

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 12

Which of the following are true about the LLC_BI__Fee__c object? (Choose 2)

- A. It has a Lookup Relationship up to the Loan object.
- B. It has a Master Detail Relationship up to the Loan object.
- C. Every Fee on a loan has a separate unique record to represent that Fee.
- D. One Fee record is used to store all the Fees for a Loan.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 13

True or False: Once the entire Loan term is defined, the payment structure data from the first payment stream is pushed back to the loan object and saved. This overwrites existing data on the loan object.

- A. True
- B. False

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 14

True or False? Collateral Management records should be created for each loan they are associated with.

- A. False
- B. True

Answer: B (LEAVE A REPLY)

NEW QUESTION: 15

When creating new screen sections for a credit memo, which field determines the order in which screen sections appear?

- A. Display Order
- B. Section Order
- C. Widget Order
- D. Render Order

Answer: A (LEAVE A REPLY)

NEW QUESTION: 16

What data points related to Collateral MGMT is recommended to be used when starting Collateral Docman Smart Checklists?

- A. Loan to Value
- B. Collateral Type-> Type/Subtype
- C. Collateral History
- D. Address
- E. Collateral Pledge

Answer: (SHOW ANSWER)

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NEW QUESTION: 17

Which of the following functions are available with the Schedule an Event feature?

- A. Create a time block on your calendar for the event

- B. Create a Recurring Event
- C. All of the above
- D. Create an All Day Event

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 18

True or False: A Limit or Sub Limit adds additional exposure to the overall hierarchy.

- A. False
- B. True

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 19

True or False? Individual Relationship records also have Contact records linked to them - and on the Contact record is where the customer's CIP information is stored.

- A. True
- B. False

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 20

When copying/cloning Collateral Management records in nCino, which field allows an end-user to include associated sub collateral records?

- A. Bulk Update
- B. Include Collateral Children
- C. Quantity
- D. Include Collateral Hierarchy
- E. Advance Rate

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 21

You can create a new task off of which of the following objects?

- A. Risk Rating
- B. All of the above
- C. Change Memo
- D. Covenant
- E. Loan Modification

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 22

True or False? Workbench can be used to query salesforce records that are otherwise difficult to report on.

- A. False

B. True

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 23

What is the name of the junction object that typically ties Loans to Relationships and Deposits?

A. Entity Involvement

B. Entity Management

C. Connections Plus

D. Collateral Management

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 24

What determines the available choices of Product Line, Product Type, and Product picklists?

A. Field Dependencies

B. Workflow + Field update

C. Clickback protection

D. Field Level Security

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 25

When configuring Credit Memo, which section resource should be used to display information from a child object to the Loan?

A. MappedSObjectScreenResource

B. SObjectScreenResource

C. MappedSObjectHierarchyScreenResource

D. ConfiguredSObjectScreenResource

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 26

Which section of your homepage can be configured to show the reports you choose to have displayed?

A. Dashboard

B. Calendar

C. Contacts

D. My Tasks

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 27

ncDataGrid can access field sets from what Objects?

- A. a visualforce page
- B. A related - related Object to the Object the UI is on
- C. The Source Object the UI is on
- D. A related Object to the Object the UI is on

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 28

True or False: An approval process can fire email alerts to a group of users.

- A. False
- B. True

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 29

What objects are standard supported for Document Manager?

- A. -Deposits
- B. -Loan
- C. -Product Package
- D. -Collateral
- E. -Relationship
- F. -Treasury Services

Answer: A,B,C,D,E,F ([LEAVE A REPLY](#))

NEW QUESTION: 30

What Icon represents a Loan record in nCino?

- A. Money Bag
- B. Folder
- C. Small Green Man
- D. Coin

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 31

True or False? During Approval Process, the Stage field on Product Package and Loan are what controls the syncing of Approval.

- A. False
- B. True

Answer: ([SHOW ANSWER](#))

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NEW QUESTION: 32

The Financial Indicator Value is determined by:

- A. The Covenant Compliance
- B. The Covenant Type
- C. The Loan Covenant
- D. The value specified by the user

Answer: D (LEAVE A REPLY)

NEW QUESTION: 33

Where should an end user begin spreading from?

- A. Credit Memo Summary Page
- B. Primary Contact
- C. Loan
- D. Relationship

Answer: C (LEAVE A REPLY)

NEW QUESTION: 34

What is configured that determines the approval process a record will go through?

- A. Original Step
- B. Entry Criteria
- C. Final approval action
- D. Beginning Process

Answer: (SHOW ANSWER)

NEW QUESTION: 35

Which of the following ways can a Loan be created in nCino? (Select Two)

- A. Collateral Management Manage Collateral Button
- B. New Loan Product button from Relationship
- C. Adding from Entity Involvement Related List
- D. Converting a Lead to a Loan

Answer: A,B (LEAVE A REPLY)

NEW QUESTION: 36

When loans are renewed or modified, the financial institution would like to ensure that Loan Team Members (related list) are not copied from the original loan. Which ConfigVal setting should be reviewed or edited to prevent this?

- A. Relative_Fields_To_Clone
- B. Relatives_To_Clone
- C. Renewal_Fields_To_Clone
- D. Renewal_Feature_Enabled

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 37

In Custom Settings, what is the name of the System Property that when configured will impact how exposure is calculated in nCino?

- A. Hierarchy
- B. CTI Guarantor
- C. Pricing.RateStructure.Fixed
- D. Exposure Exclusion

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 38

The Address is found on which object?

- A. Collateral Management
- B. Collateral Pledged
- C. Lien
- D. Loan

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 39

Which fields must be filled out when converting a Lead to a Loan?

- A. Relationship and Loan Lookups
- B. Related Entities
- C. Customer Contact Information
- D. Product Information

Answer: D ([LEAVE A REPLY](#))

NEW QUESTION: 40

True or False: Appending 'tool-' OR 'action-' to the beginning of an App Name on the Route object will make the Route display in the Magic Wand.

- A. False
- B. True

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 41

True or False? Informatica loads run on a manual sync. The admin must tell the sync to run.

- A. True
- B. False

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 42

True or False: It is NOT important to have a corresponding customer request/permission before attempting to data load.

- A. False
- B. True

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 43

Connections is used to join what 2 type of records.

- A. Relationships with other Relationships
- B. Reports to Dashboards
- C. Relationships to Loans
- D. Loans with other Loans

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 44

What objects are standard supported for Document Manager?

- A. Product Package
- B. Collateral
- C. Treasury Services
- D. Relationship
- E. All of the Above
- F. Deposits
- G. Loan

Answer: E ([LEAVE A REPLY](#))

NEW QUESTION: 45

The Product Catalog is configured on the back end by using what tool?

- A. Document Manager Tab
- B. Copy Loan Plus Tool
- C. DM Admin Tool
- D. Standard Cloner Tool

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 46

True or False? Activity History shows any prior CRM activities performed (phone calls, email sent, meetings, etc) and Open Activities shows any pending tasks.

- A. True
- B. False

Answer: A ([LEAVE A REPLY](#))

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NEW QUESTION: 47

True or False? A Loan converts to a lead through the "Convert to nCino" button.

- A. False
- B. True

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 48

For a user to generate a record below the Main on the loan record in nCino, which button are you required to add to the page layout?

- A. Manage Customer Portal
- B. Sharing
- C. Credit Memo
- D. New Limit/Sub/Takedown

Answer: D ([LEAVE A REPLY](#))

NEW QUESTION: 49

How Does nCino use Risk Rating? (Choose 2 answers)

- A. Automatically updates all Rating Worksheets
- B. Allows use of an Approval Process to manage requests
- C. Customize Rating Worksheets
- D. Customize Rating Worksheets

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 50

When setting a Route to look at a VisualForce Page what field holds the API name of the VisualForce Page?

- A. App Name
- B. Route Name
- C. Screen Name
- D. Body

Answer: D ([LEAVE A REPLY](#))

NEW QUESTION: 51

When configuring Loan Team Member alerts, what loan field is populated via workflow to initiate the notification?

- A. Loan Alerts
- B. Team Alerts
- C. Team Member Alerts
- D. Notification Alert

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 52

When are notifications sent out after a loan is approved or rejected?

- A. Weekly
- B. Automatically
- C. Daily
- D. Monthly

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 53

True or False? During Approval Process, the Stage field on Product Package and Loan are what controls the syncing for Approval.

- A. True
- B. False

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 54

When configuring nCino feature from a knowledge base article and a necessary field is not available on the page layout what is the best FIRST step to take to locate the field?

- A. Create the field
- B. Check with the knowledge team to make sure the article is up to date
- C. Chatter your team lead
- D. Click edit page layout and search for the missing field

Answer: D ([LEAVE A REPLY](#))

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