Salesforce Commercial Banking Functional

1. To use RLTV, financial institutions need to ensure they currently use which of the following features?

A. Both Enhanced Collateral Management and Total Exposure

B. Enhanced Collateral Management

C. Total Exposure

D. None of the above

Answer(s): B

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

A. Quantity

B. Bulk Update

C. Include Collateral Children

D. Advance Rate

E. Include Collateral Hierarchy

Answer(s): C

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

A. Copy Loan Plus Tool

B. DM Admin Tool

C. Standard Cloner Tool

D. Document Manager Tab

Answer(s): B

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

A. Field Level Security

B. Field Dependencies

C. Clickback protection

D. Workflow + Field update

Answer(s): B

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

A. True

B. False

Answer(s): B

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

☐ A. Converting a Lead to a Loan

☐ B. New Loan Product button from Relationship

☐ C. Adding from Entity Involvement Related List

☐ D. Collateral Management Manage Collateral Button

Answer(s): B D

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7. When converting a lead, what is NOT created?

A. Loan

B. Memo

C. Individual Relationship

D. Business Relationship

Answer(s): B

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

A. Collateral Management

B. Entity Management

C. Connections Plus

D. Entity Involvement

Answer(s): D

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

A. Product Information

B. Customer Contact Information

C. Related Entities

D. Relationship and Loan Lookups

Answer(s): A

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10. Where would a Route with the App Name of 'third-party-reports' display if you assigned it to a Group via Route Group and did NOT give it a Parent Route?

A. In the Magic Wand

B. It won't render because it doesn't have a Parent Route

C. The Main Navigation

D. The Secondary Navigation

Answer(s): C

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11. 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. True

B. False

Answer(s): A

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12. ncDataGrid can access field sets from what Objects?

A. The Source Object the UI is on

B. A related Object to the Object the UI is on

C. A related - related Object to the Object the UI is on

D. a visualforce page

Answer(s): A

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

A. Route Name

B. App Name

C. Screen Name

D. Body

Answer(s): D

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14. The 'Loan Details' Main Navigation has Sub Navigation called Questionnaire that should be the first Route that is seen when clicking the 'Loan Details'. Where is the 'Default Context' checkbox checked toNmake the Questionnaire show up first?

A. Route

B. Route Group

C. Group

D. Screen Section

Answer(s): B

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15. True or False? An approval process can fire email alerts to groups of users.

A. True

B. False

Answer(s): A

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16. True or False? A Loan that is processed through nCino will typically go through multiple approval processes.

A. True

B. False

Answer(s): A

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

A. Original Step

B. Entry Criteria

C. Beginning Process

D. Final approval action

Answer(s): B

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18. What field on the Loan controls Total Reviewable Loan Facilities? (Pick one)

A. In Review

B. Is Ready Review

C. Loan Number

D. None of the above

Answer(s): B

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19. What controls where Loans appear in Non-Pending Facilities and Pending Facilities on Product Package?

A. Product State Config

B. Stage

C. Status

D. Custom Settings

E. All of the Above

Answer(s): E

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20. How do I Modify/Renew a Loan from Product Package?

A. Credit Actions button

B. Navigate to loan and then modify/renew

C. Manage Loan button

D. Bulk Actions button

Answer(s): A