



201-COMMERCIAL-BANKING-FUNCTIONAL^{Q&As}

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QUESTION 1

The Address is found on which object?

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

Correct Answer: D

QUESTION 2

Once the Covenant Compliance record is set to Compliant status, the Next Evaluation Date on the parent Covenant automatically moves forward based on the frequency set on the parent Covenant. This is accomplished via workflow rules and can be customized.

Which of the following is necessary for a sync with records coming from the Core?

- A. A match on the Relationship Social Security Number or Tax ID
- B. A match on the lookupKey value for the record
- C. A match on the name of the record
- D. A Salesforce ID match

Correct Answer: B

QUESTION 3

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

- A. True
- B. False

Correct Answer: A

QUESTION 4

Which of the following object are commonly referred to as "Ticklers":

- A. Loan Covenants



- B. Events
- C. Covenant Compliance
- D. Covenant Management

Correct Answer: C

QUESTION 5

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

Correct Answer: B

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