



**Free Questions for 201-Commercial-Banking-Functional by
dumpshq**

Shared by Hudson on 22-07-2024

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Question 1

Question Type: MultipleChoice

Any financial documents for your borrower should be saved in the _____.

Options:

- A- Relationship Document Manager
- B- Connections
- C- Loan Document Manager
- D- Overview

Answer:

A

Question 2

Question Type: MultipleChoice

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

Options:

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

Answer:

C

Question 3

Question Type: MultipleChoice

True or False? The relationship statistics section comes with a default collection of exposure calculations.

Options:

A- False

B- True

Answer:

B

Question 4

Question Type: MultipleChoice

The following are the Related Lists (also called "hovers" or "quick links") that store any CRM activities for the relationship that have been closed/completed.

Options:

A- Contacts

B- Activity History

C- Connections

D- Open Activities

Answer:

B

Question 5

Question Type: MultipleChoice

True or False? By default, the total exposure includes any proposed direct or indirect exposure.

Options:

A- True

B- False

Answer:

A

Question 6

Question Type: MultipleChoice

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.

Options:

A- True

B- False

Answer:

A

Question 7

Question Type: MultipleChoice

Connections is used to join what 2 type of records.

Options:

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

Answer:

A

Question 8

Question Type: MultipleChoice

True or False? In order to override a risk grade computed value, you must add comments in order for it to be saved.

Options:

A- True

B- False

Answer:

A

Question 9

Question Type: MultipleChoice

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.

Options:

A- True

B- False

Answer:

B

Question 10

Question Type: MultipleChoice

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

Options:

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

Answer:

D

Question 11

Question Type: MultipleChoice

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

Options:

A- Weekly

B- Daily

C- Monthly

D- Automatically

Answer:

D

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