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Field Service Lightning Cloud Consultant

Salesforce Field-Service-Lightning-Cloud-Consultant

Version Demo

Total Demo Questions: 8

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Topic Break Down

Topic	No. of Questions
Topic 1, Discovery	3
Topic 2, Design	8
Topic 3, Configuration	58
Topic 4, Integration	1
Topic 5, Managing Field Service	10
Total	80

QUESTION NO: 1

Universal Containers wants to provide Dispatchers with Account and Asset details when they hover over each Service Appointment.

How should a Consultant recommend implementing this feature?

A. Add Fields on the Page Layout.

B. Configure Field Sets on the Service Appointment.

C. Use Lookup Fields.

D. Create CSS in the Dispatcher's Console.

ANSWER: B

Explanation:

Configure Field Sets on the Service Appointment. Field Service uses field sets to control the information presented to dispatchers in the service appointment tooltip on the Gantt. A consultant can configure the applicable Service Appointment field set with the fields that should be visible when a dispatcher hovers over an appointment. This makes important context available directly in the scheduling workspace, without requiring the dispatcher to open the appointment record.

To show Account and Asset context, the organization can expose the relevant fields through fields available on Service Appointment, including fields populated from its related work order, account, or asset process. If the desired related information is not already represented on the Service Appointment, an administrator can use appropriate formula fields or automation to place the needed display values on that record, then include those fields in the field set. This approach is declarative, configurable, and aligned with how Field Service controls hover-detail content for dispatchers. Salesforce describes field sets as reusable groups of fields that can be referenced by supported platform features and customizations; see Salesforce Help: Field Sets. For Field Service scheduling and dispatcher workspace context, see Salesforce Trailhead: Field Service Basics.

QUESTION NO: 2

Universal Containers is expecting the amount of work to increase significantly over the next three weeks. They have decided to engage a new third-party Contract to help with the additional work.

How should a Consultant recommend configuring the new Contractor?

A. Create a Capacity-based Resource and delete that Resource after three weeks.

B. Create a Resource and give them 24-hour availability for the next three weeks.

C. Create a Capacity-based Resource and give them Capacity for the next three weeks.

D. Create a Capacity-based Resource and give them 24-hour availability for the next three weeks.

ANSWER: C

Explanation:

Create a Capacity-based Resource and give them Capacity for the next three weeks. A capacity-based resource represents a crew, contractor, or other resource whose available work is measured as an aggregate amount of capacity rather than as an individual technician’s precise working hours. This model is especially appropriate when a third-party contractor is engaged temporarily to absorb increased demand and Universal Containers needs to define how much work the contractor can accept during a limited period.

Capacity can be entered for the specific dates over the coming three weeks, allowing the scheduling and optimization processes to assign appointments up to the contractor’s available daily capacity. This approach also avoids requiring Universal Containers to model an individual contractor’s shift details or to give the resource unrestricted, around-the-clock availability. After the temporary engagement ends, the dated capacity no longer makes the contractor available for new appointments, while retaining the resource record and its historical scheduling information.

Salesforce describes capacity-based resources as resources whose capacity is managed in units of work rather than by operating hours. See Salesforce Help: Field Service Resource Types and Salesforce Help: Capacity-Based Resources.

QUESTION NO: 3

Universal Containers wants to give Field Technicians the ability to create follow-up appointments if they are unable to complete a Work Order due to missing inventory.

What should a Consultant implement to meet this requirement?

A. Implement a Quick Action to create a new Service Appointment on the existing Work Order.

B. Implement a Quick Action to create a new Work Order Line Item on the existing Work Order.

C. Implement a Macro to generate Service Appointments on the existing Work Order.

D. Implement a Custom Button to Create a Service Appointment on the existing Work Order.

ANSWER: A

Explanation:

Implement a Quick Action to create a new Service Appointment on the existing Work Order. A Service Appointment represents the scheduled field-service visit used to dispatch and manage technician work. When inventory is unavailable, the technician can use a quick action from the Work Order in the Field Service mobile experience to create another related Service Appointment for a later visit. Because the new appointment is related to the same Work Order, the original service request, account, location, required work, and service history remain consolidated under one record while the follow-up visit can be independently scheduled, assigned, and dispatched.

Quick actions are designed for concise, context-aware record creation and can be exposed in the relevant Salesforce mobile and Field Service user experience. A consultant can configure the action to prepopulate appropriate values, such as the parent Work Order and an initial status, reducing technician data entry and helping ensure that the follow-up appointment enters the normal scheduling and dispatch process. Salesforce describes Service Appointments as records that represent visits to perform work, and Work Orders can have related appointments. See the Salesforce Service Appointment object documentation and the Salesforce Trailhead overview of work orders and service appointments.

QUESTION NO: 4

Universal Containers provides multiple service types (i.e., Installation, Maintenance, Break/Fix, etc.). Each service requires a variety of skills and certifications in order for a resource to excel. Which two configurations should a Consultant implement to meet this requirement? (Choose two.)

A. Select the relevant Work Types for each Resource.

B. Use Work Types with Required Skills.

C. Assign the appropriate Skills to Resources.

D. Create Multiple Work Orders Line Items per service.

ANSWER: B C

Explanation:

Use Work Types with Required Skills and assign the appropriate Skills to Resources. In Salesforce Field Service, a Work Type defines the common requirements for a category of field work, such as installation, maintenance, or repair. Required Skills can be associated with the Work Type to state the specific competencies or certifications needed to perform that service. When work is created using the Work Type, those requirements can be applied to the resulting service appointment through the work type's skill requirements.

Resources must also be associated with the skills they possess by creating Service Resource Skill records. These records can include an effective date and expiration date, which is particularly useful for certifications that require renewal. Scheduling and optimization can then evaluate the required skills for the appointment against the active skills held by each service resource, helping ensure that assigned technicians are qualified for the particular service. This configuration creates a reusable, maintainable skills-based scheduling model across all service types. See Salesforce's Work Types documentation and Skills and service resources documentation.

QUESTION NO: 5

Universal Containers (UC) wants to better understand their service business and Field Service Technician teams' schedules. A Consultant suggested UC start to forecast and plan.

Which two abilities does forecasting and planning provide? (Choose two.)

A. Proactively adjust to demand fluctuations.

B. More consistently meet customer response times.

C. More accurately assign Work Orders based on skills.

D. Proactively adjust Service Contracts.

ANSWER: A B

Explanation:

Forecasting and planning helps a service organization turn historical and anticipated work into an actionable view of future demand, required capacity, and staffing needs. This enables UC to identify periods in which the expected volume of service work is likely to exceed available technician capacity, as well as periods with unused capacity. With that visibility, UC can proactively adjust to demand fluctuations by changing workforce plans, such as hiring, using contractors, cross-training, or shifting technician availability before service levels are affected.

Forecasting and planning also helps UC more consistently meet customer response times. By comparing predicted demand with available capacity and considering operating constraints, planners can develop staffing plans that better support service commitments. The organization can then make earlier, data-informed decisions that reduce the risk of insufficient coverage when demand rises. Salesforce Field Service forecasting is intended to help organizations anticipate demand and capacity so they can optimize workforce planning and maintain service performance. See Salesforce's Forecasting overview and the Field Service Forecasting and Planning Trailhead module.

QUESTION NO: 6

Universal Containers wants to ensure that Service Appointments are only assigned to Active Resources.

What configuration should a Consultant recommend for the Scheduling Policy?

A. Match Boolean

B. Match Fields

C. Preferred Resources

D. Required Resources

ANSWER: A

Explanation:

Match Boolean is the appropriate Scheduling Policy configuration because it evaluates a Boolean condition when the scheduling engine determines which service resources are eligible for a Service Appointment. The Active setting on a Service Resource is a Boolean value, so this rule can be used to ensure that scheduling considers only resources whose applicable active-status value meets the required condition. This lets the policy enforce the operational requirement directly

during candidate selection, rather than relying on manual dispatcher intervention after an appointment has been proposed or assigned.

Scheduling policies combine work rules to narrow the pool of eligible resources before optimization ranks and schedules candidates. A Boolean-based matching rule is well suited to status flags such as whether a resource is active and available for assignment. Configuring the policy this way supports consistent automated scheduling and helps prevent appointments from being allocated to resources that should not receive work. Salesforce's Field Service scheduling materials describe how scheduling policies and work rules govern the resource-selection process: Trailhead: Schedule Field Service Work. Additional Field Service scheduling guidance is available in the Salesforce Help optimization overview.

QUESTION NO: 7

Universal Containers needs to close a Service Territory for a company holiday. No Service Appointments should be scheduled in the territory on that date, but normal territory hours should resume on the following business day.

Which two configurations should a Consultant recommend? (Choose two.)

A. Create a Holiday record for the closure date.

B. Associate the Holiday with the Operating Hours used by the Service Territory.

C. Create a Resource Absence for every Service Appointment in the territory.

D. Change all Service Resources to inactive for the closure date.

ANSWER: A B

Explanation:

Create a Holiday record for the date on which the territory will not provide service. Holidays identify exceptions to otherwise recurring business hours.

Associate the Holiday with the Operating Hours used by the Service Territory. Scheduling then considers the territory unavailable for the holiday while retaining the normal recurring operating hours for all other dates. See Salesforce Trailhead guidance on Field Service configuration.

QUESTION NO: 8

Universal Containers wants to track the total associated price when servicing Work Orders for Customers.

Which two of the following should a Consultant recommend? (Choose two.)

A. Use Work Order and Work Order Line Items.

B. Use a custom object to model the Work Order pricing.

C. Use the Einstein Pricing Configurator.

D. Set up Products and Price Books.

ANSWER: A D

Explanation:

Use Work Order and Work Order Line Items. is appropriate because Field Service represents a service visit or job with a Work Order and captures the individual labor, parts, or services associated with that job as Work Order Line Items. Work Order Line Items provide the standard structure for recording each chargeable item and its quantity, pricing details, and calculated total. Salesforce can therefore roll the individual line-item amounts into the Work Order's total price, giving the business a consistent total associated price for the customer service work.

Set up Products and Price Books. is also needed because Products define the parts and services that technicians can use or perform, while Price Books maintain their applicable prices. When a product is added to a Work Order Line Item, the relevant price-book entry supplies the price context and supports accurate unit and total pricing. Together, standard Work Orders, Work Order Line Items, Products, and Price Books meet the requirement without requiring a separate pricing data model. Salesforce describes Work Orders and their line items in its Field Service Work Orders Trailhead module, and the available WorkOrderLineItem pricing fields are documented in the Salesforce WorkOrderLineItem reference.