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Consultant**

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Topic Break Down

Topic	No. of Questions
Topic 1, Life Sciences Industry Knowledge	24
Topic 2, Agentforce for Life Sciences	59
Topic 3, Data Cloud for Life Sciences	1
Topic 4, Implementation Strategy	65
Total	149

QUESTION NO: 1

Choose 1 option.

An Agentforce Life Sciences Consultant at Cumulus Pharma needs to complete the Activity Plan configurations aligned with the company's objectives and activate the plans based on the time period.

Which step meets this requirement?

- A. Schedule or immediately trigger the Validate Activity Plans batch job.
- B. Schedule or immediately trigger the Process Provider Activity Plans batch job.
- C. Schedule or immediately trigger the Update Activity Plan Status batch job.

ANSWER: C

Explanation:

Schedule or immediately trigger the Update Activity Plan Status batch job. is correct because this job manages Activity Plan status according to each plan's configured effective time period. After the consultant has configured plans to reflect the organization's objectives, the status-update process evaluates the relevant dates and transitions plans into the appropriate active state when their planned period begins. It can be run immediately when plans need to become available at once, or scheduled so that activation occurs consistently as plan periods change over time. This supports operational continuity for field teams because the plans that are currently in effect are activated without requiring a manual status change for every period.

Activity Plans are part of Life Sciences Cloud functionality for organizing field activities around defined business goals, timeframes, and targets. Using the dedicated status batch job is therefore the implementation step that connects completed configuration with time-based activation. Salesforce's Life Sciences Cloud documentation and Help resources provide product guidance and feature-specific setup information: [Salesforce Help](#) and [Salesforce Life Sciences Cloud](#).

QUESTION NO: 2

Choose 1 option.

A brand team has approved a presentation containing pages for Immunexis, a competitor comparison, and an unbranded disease-state discussion. Sales leadership wants reporting to identify precisely which Immunexis pages were detailed during provider visits without treating the entire presentation as Immunexis content.

Which standard object should the Agentforce Life Sciences Consultant use to associate the relevant pages with the product?

- A. Presentation Page Product
- B. Presentation Linked Page
- C. Life Sciences Marketable Product

ANSWER: A

Explanation:

Presentation Page Product represents the association between a presentation page and a product. It supports page-level product identification, which is required when one presentation contains content related to multiple products or non-product material.

Associating only the presentation at the deck level would not identify the specific pages used for Immunexis detailing. Presentation Linked Page relates content pages but does not provide the product association needed for product-specific analytics.

QUESTION NO: 3

Choose 1 option.

Cumulus Pharma's field sales reps use the Medical Insights feature in Agentforce Life Sciences for Customer Engagement to record insights from their engagements with Healthcare Providers (HCPs). Sales leadership determines that all reps in a territory can benefit from medical insights captured from HCPs in that territory.

Which out-of-the-box configuration makes it possible for reps in the same territory to collaborate on medical insights?

- A. MedicalInsightAvailabilityHandler
- B. MedicalInsightSharingHandler
- C. MedicalInsightTerritoryAvailabilityHandler

ANSWER: B

Explanation:

MedicalInsightSharingHandler is the correct out-of-the-box configuration because the stated requirement is for field representatives to access and collaborate on Medical Insight records created by colleagues who work in the same territory. This is a record-visibility and sharing requirement: insight data captured during an HCP engagement must be available to the other appropriate users, rather than remaining visible only to its creator. The Medical Insights experience supports territory-aware work by allowing field users to work with insights relevant to their assigned territories. The sharing handler is the configuration intended to apply the sharing behavior needed for that collaborative access model, so representatives operating in a common territory can use the collected HCP intelligence in their subsequent engagements and planning. This supports a consistent territory view of medical information while relying on the Life Sciences Cloud feature's standard configuration rather than requiring a custom sharing implementation. For broader context on Salesforce's Life Sciences Cloud capabilities and its customer-engagement workflows, see [Salesforce Life Sciences Cloud](#) and the [Salesforce Industries documentation](#).

QUESTION NO: 4

Choose 1 option.

An Agentforce Life Sciences Consultant has finished configuring the Q4 Launch Plan and set the status to "In Progress." However, field sales reps report that they cannot see the plan or their targets on their dashboards. The Start Date is today. The system requires a specific batch process to transition the plan from "In Progress" to "Active" based on the start date.

Which job must the consultant run in the Admin Console?

- A. Activity Plan Trigger Handler
- B. Update Activity Plan Status
- C. Validate Activity Plans

ANSWER: B

Explanation:

Update Activity Plan Status is the required Admin Console job because Activity Plans are date-driven operational plans. The plan's Start Date being today makes it eligible to begin, but setting a record to *In Progress* does not, by itself, perform the scheduled lifecycle transition that makes the plan active for field execution. This batch job evaluates applicable Activity Plan dates and updates eligible plans from *In Progress* to *Active*. Once the Q4 Launch Plan is active, its assigned sales-representative goals and targets can be used by the related Life Sciences processes and surfaced in the reps' dashboards.

The consultant should run this job after confirming that the plan's configured start date, assignments, and target setup are complete. It is specifically intended to process the date-based status change described in the scenario, ensuring that a plan scheduled to start today enters its active execution period without requiring each plan to be manually transitioned. Salesforce's Life Sciences documentation describes Activity Plans as a way to define and track field-team goals over a defined plan period; see the [Salesforce Life Sciences Activity Plan overview](#) and the [Salesforce Activity Plans documentation](#).

QUESTION NO: 5

Choose 1 option.

Cumulus Pharma has separate visit processes for individual Healthcare Providers (HCPs) and Healthcare Organizations (HCOs). A representative creates a visit from an HCO account, but the mobile app presents the HCP visit process. Both Account record types and both Visit record types already exist and are available to the representative.

Which configuration should the Agentforce Life Sciences Consultant review?

- A. Map the HCO Account record type to the HCO Visit record type in Map Visit Types to Accounts.
- B. Assign the HCO Visit page layout to the representative's profile.
- C. Enable Visit Management Triggers for the HCO Account record type.

ANSWER: A

Explanation:

Review and create the applicable mapping in **Map Visit Types to Accounts** in the Admin Console. This configuration links an Account record type to the Visit record type that should be used when a visit is created in that account context.

Page layouts can alter the fields presented after a record type is selected, but they do not establish the Account-to-Visit process relationship. Enabling a trigger handler does not replace the standard visit-type mapping.

QUESTION NO: 6

Choose 1 option.

Cumulus Pharma uses Agentforce Account Summary to access the latest and most relevant account information before each Healthcare Provider (HCP) interaction. The company is onboarding a new persona for its Key Account Managers (KAMs). The provider account summary generated for this new persona needs information from two additional custom objects that store insights and market intelligence.

Which configuration ensures the new information is used only while generating the provider summary for this new persona?

- A. Create a new cross-object graph from a template, add the custom objects, and assign the new graph to the KAM profile.
- B. Create mapping records in the Provider Summary Profile Mappings tab for the two custom objects and the KAM profile.
- C. Update the Provider Summary Objects mapping to add the custom objects and their mapping to the KAM profile.

ANSWER: B

Explanation:

Create mapping records in the Provider Summary Profile Mappings tab for the two custom objects and the KAM profile. This configuration applies the additional insight and market-intelligence data specifically to the provider-summary experience associated with the Key Account Manager persona. The mappings establish the relationship between the summary data sources and the applicable user profile, so the custom-object context is included when that profile generates a provider account summary. This provides the needed persona-level scoping rather than broadly changing the information used for every provider summary.

Provider account summaries are intended to give life-sciences users a concise, grounded view of relevant account information before engaging with an HCP. Because different field roles can require different context, profile-aware configuration supports tailoring the generated summary to the work performed by each persona. Mapping the two objects to the KAM profile preserves that separation while allowing KAMs to benefit from the newly available data. For Salesforce guidance on configuring and working with Agentforce and life-sciences capabilities, see the [Salesforce Agentforce documentation](#) and the [Salesforce Life Sciences documentation](#).

QUESTION NO: 7

Choose 1 option.

Cumulus Pharma wants to launch “Immunexis” and has defined strict sample limit policies based on the “Engagement Tier” of the Healthcare Provider (HCP). Tier 1 accounts, or High Engagement accounts, are allocated 50 samples per year. Tier 2 accounts, or Low Engagement accounts, are allocated 10 samples per year. The Engagement Tier is a calculated field on the Account record that updates monthly based on the rep’s activity. The company requires that, if an HCP’s activity increases and the HCP moves from Tier 2 to Tier 1, the sample limit allocation must automatically update to the higher limit without manual administrative intervention to reassign the template.

What should the Agentforce Life Sciences Consultant configure in the Admin Console to meet this requirement?

- A. Account Segmentation
- B. Dynamic Segmentation
- C. Sample Segmentation

ANSWER: B

Explanation:

Dynamic Segmentation is the appropriate configuration because the assignment must be driven by an Account attribute that can change after the initial setup. The Engagement Tier is a calculated Account field that is recalculated monthly, so the HCP population cannot be managed as a fixed list. A dynamic segment uses defined criteria to maintain membership as qualifying record values change. The consultant can create segments that identify Tier 1 and Tier 2 HCPs from the Engagement Tier field and associate each segment with the applicable provider sample-limit template.

When the monthly calculation changes an HCP from Tier 2 to Tier 1, dynamic segmentation reevaluates the HCP against the segment criteria. The HCP then belongs to the high-engagement segment, allowing the associated annual allocation of 50 Immunexis samples to be applied without an administrator manually moving the HCP or reassigning a template. This preserves a declarative, repeatable policy implementation while ensuring sample-limit assignments remain aligned with the current engagement classification.

Salesforce’s Life Sciences Cloud data model includes the relationships used for account grouping, provider sample limits, and sample-limit templates; see the [Life Sciences Cloud Data Model](#). For the broader product context, see [Salesforce Life Sciences](#).

QUESTION NO: 8

Choose 1 option.

Cumulus Pharma’s field sales reps use the Medical Insights feature in Agentforce Life Sciences for Customer Engagement to record insights from their interactions with Healthcare Providers (HCPs). The reps often collect these insights during visits at the HCP’s office.

Which configuration makes it possible for users to quickly report a medical insight while managing a visit on their iPad?

- A. Create a custom action using the Visit Medical Insights flow and add it to the Visit page layout.
- B. Configure the Create Medical Insights quick action using the Admin Console.
- C. Edit the Visit page layout and add the New Medical Insights standard action.

ANSWER: B

Explanation:

Configure the Create Medical Insights quick action using the Admin Console. is correct because the requirement is to let field reps capture a medical insight rapidly and in context while they are working with a Visit in the Life Sciences for Customer Engagement mobile experience on an iPad. The Admin Console provides the configuration surface for managing

the quick and custom actions presented in that purpose-built mobile application. Adding the delivered Create Medical Insights quick action makes the insight-creation capability accessible from the rep's mobile workflow, reducing navigation and supporting timely capture of observations made during an HCP office visit.

Medical Insights is designed to record and organize information collected from healthcare-professional engagements, while the mobile application supports field teams performing visit-related activities away from a desktop. Configuring the available quick action through the Admin Console aligns the action with the Life Sciences mobile user experience rather than relying only on a standard Salesforce record-page configuration. This is the declarative, product-supported approach for exposing the capability where the rep needs it.

See Salesforce Help for [Medical Insights](#) and [Quick and Custom Action Management](#).

QUESTION NO: 9

Choose 1 option.

Cumulus Pharma has a unique record for a Healthcare Provider (HCP). During a visit, a field sales rep captures another address in Contact Point Address and marks it as primary, without updating the existing address record that is already marked as primary. The company's admin has scheduled the out-of-the-box Account Address batch jobs to run nightly.

Which record will the job use as primary?

- A. The previous primary record
- B. The last modified non-primary record
- C. The last modified record that is marked as primary

ANSWER: C

Explanation:

The Account Address batch job uses the last modified Contact Point Address record that is marked as primary. In this scenario, two Contact Point Address records for the HCP have the primary designation: the pre-existing address and the address captured during the visit. The batch process resolves this conflict deterministically by selecting the primary-marked record with the most recent modification date and time. Because the sales representative has just captured and marked the additional address as primary, that address is the most recently modified qualifying record and becomes the address used by the nightly job as the account's primary address.

This behavior is important when integrations, data loads, or user actions result in more than one Contact Point Address being designated as primary. Rather than leaving the account-address result ambiguous, the standard batch job applies the last-modified rule to establish a single effective primary address for downstream Life Sciences Cloud account-address processing. Administrators should still use governance, validation, or automation where appropriate to prevent unintended duplicate primary designations and maintain high-quality HCP address data. Salesforce describes Contact Point Address as the standard object for storing an individual's address details; see the [Salesforce Contact Point Address data model documentation](#) and the [Life Sciences Cloud Account Address batch jobs documentation](#).

QUESTION NO: 10

Choose 1 option.

Cumulus Pharma is implementing a feature where Healthcare Providers (HCPs) sign for drug samples on an iPad. The company's compliance team states that, to meet Food and Drug Administration (FDA) 21 CFR Part 11 requirements, a simple image of the signature is insufficient; the system must link the signature to the data and the user's credentials at the exact moment of signing.

Which feature generates this tamper-evident audit trail?

- A. Digital Verification
- B. Field Audit Trail

ANSWER: A

Explanation:

Digital Verification is the Salesforce Life Sciences capability intended to support electronic-signature workflows, including sample acknowledgments captured from healthcare providers. It creates a controlled signature-trail process rather than merely saving an image drawn on a device. The verification captures the signer's identity and credentials, associates that verification with the applicable business data, and records the signing event at the time it occurs. This linkage is essential to an electronic-records and electronic-signatures control framework because the signature must be attributable to an individual and bound to the specific record or action that they approved.

For regulated sample-management processes, this record-level relationship provides the evidence needed to demonstrate who signed, what they signed, and when the signature was applied. The resulting trail is designed to be tamper evident: changes or subsequent actions can be assessed in the context of the original verification rather than treating the signature as an isolated attachment. Salesforce documents Digital Verification as a standard Life Sciences data model for managing verification and electronic-signature information. See the [Salesforce Digital Verification data model documentation](#) and Salesforce's [Life Sciences Cloud overview](#) for product context.

QUESTION NO: 11

Choose 1 option.

Cumulus Pharma's director of compliance requires its field sales reps to verify current sample holdings against the digital audit trail to prepare for an upcoming Food and Drug Administration (FDA) inspection.

Which assessment type meets this requirement?

- A. Ad Hoc
- B. Audited
- C. Periodic

ANSWER: B

Explanation:

Audited is the appropriate assessment type because the stated purpose is a formal, compliance-focused reconciliation of each representative's physical sample holdings with the recorded inventory history before an FDA inspection. In Life Sciences Cloud Sample Inventory Management, an audited inventory assessment supports controlled inventory verification activities, including self-audits, inventory declarations, and peer-audit processes. This makes it suitable when the organization needs evidence that on-hand samples have been checked and confirmed against the system's digital trail rather than simply counted for operational planning.

For regulated sample management, the verification must be defensible: it should establish what was counted, who performed or attested to the count, and how that count corresponds to the organization's inventory records. An audited assessment creates the structured process needed for those audit-readiness activities and supports the compliance team's need to demonstrate oversight of sample accountability. The emphasis on preparing for a regulatory inspection and validating holdings against an audit trail directly aligns with an audit-oriented assessment workflow. Salesforce documentation for Life Sciences Cloud inventory capabilities is available through [Salesforce Help](#). FDA expectations for trustworthy electronic records and audit trails are also addressed in [21 CFR Part 11](#).

QUESTION NO: 12

Choose 1 option.

Cumulus Pharma wants to launch a new product, â€œImmunexis,â€ and mandates that field sales reps must capture explicit opt-in consent from Healthcare Providers (HCPs) before sending any digital marketing materials. The following records are already configured in Agentforce Life Sciences:

Data Use Purpose record for â€œImmunexis Marketingâ€

Communication Subscription record named â€œImmunexis KOL Webinar Seriesâ€

Engagement Channel Type record for â€œEmailâ€

When reps attempt to capture consent on their iPads, they can see the â€œImmunexis KOL Webinar Seriesâ€ subscription, but they cannot select â€œEmailâ€ as a channel to capture the opt-in preference.

Which step resolves this issue so the rep can select â€œEmailâ€ for this subscription?

A. Create a Communication Subscription Channel Type junction record to link the Subscription to the Engagement Channel Type.

B. Create a Communication Subscription Consent record for the user profile to activate the channel visibility.

ANSWER: A

Explanation:

Create a Communication Subscription Channel Type junction record to link the Subscription to the Engagement Channel Type. Salesforce Consent Management models a communication preference using separate records for the subscription topic and the communication channel. The Communication Subscription identifies what the person is subscribing to, such as the Immunexis KOL Webinar Series, while the Engagement Channel Type identifies the medium, such as Email. A Communication Subscription Channel Type record establishes that Email is an allowed channel for that specific subscription.

That association is required before the consent-capture experience can present Email as a selectable preference for the webinar subscription. Once it exists, a field rep can record the HCP's explicit opt-in for the appropriate subscription and email channel during the interaction. The resulting consent information can then be applied consistently when determining whether the HCP is eligible to receive the relevant marketing communications, supporting the product's consent requirements.

This configuration follows Salesforce's consent data model, in which communication subscriptions, channel types, and their relationship are maintained independently so that organizations can accurately support multiple topics and communication methods. See Salesforce's [Consent Management data model documentation](#) and the [Salesforce Consent Management overview](#).

QUESTION NO: 13

Choose 1 option.

A field sales rep performs an ad hoc inventory count for a controlled sample product. The rep enters a physical count of 95 units, while the system currently displays a balance of 100 units. The business requires that the system inventory records immediately reflect the physical reality to ensure an accurate audit trail.

How does Agentforce Life Sciences for Customer Engagement handle this discrepancy?

A. Generates a Product Request to replenish the 5 missing units from the parent territory.

B. Locks the Product Item record and triggers a mandatory Audited Assessment workflow.

C. Automatically generates an adjustment transaction to reconcile the system balance with the physical count.

ANSWER: C

Explanation:

Automatically generates an adjustment transaction to reconcile the system balance with the physical count. This is the standard Sample Inventory Management behavior for an inventory-count discrepancy. When the field sales rep records an

actual quantity that differs from the quantity currently recorded by the system, the application creates a discrepancy adjustment so the inventory balance matches the verified physical count.

Here, the count establishes that 95 units are physically present rather than the recorded 100. The resulting adjustment records a decrease of 5 units, bringing the system inventory quantity into alignment with the actual inventory without overwriting the prior balance. Recording the variance as an adjustment transaction provides the required traceability: users can identify that a count occurred, see the quantity difference, and retain an auditable record of the reconciliation activity. This is particularly important for controlled samples, where accurate accountability and inventory history are essential.

Salesforce documents that Sample Inventory Management adjusts the system count positively or negatively to match the actual count when a discrepancy is recorded during an inventory count. See Salesforce Help: [Discrepancy Adjustments for Inventory Counts](#). For broader product context, see [Salesforce Life Sciences](#).

QUESTION NO: 14

Choose 1 option.

Cumulus Pharma wants to roll out Tableau Next to provide its field sales team with real-time performance insights, such as “Visit Plan Attainment,” directly within the Agentforce Life Sciences mobile app. The relevant Metrics have been created, the Tableau View component has been added to the Mobile Home Page Lightning record page, and the metadata cache has been refreshed. However, when a field sales rep logs in to the app, the Metrics component displays an error indicating insufficient privileges and the metrics do not load.

Which Tableau Next permission set should the Agentforce Life Sciences Consultant assign to resolve this issue?

- A. Tableau Next Creator
- B. CRM Analytics Plus User
- C. Tableau Next Consumer

ANSWER: C

Explanation:

Tableau Next Consumer is the appropriate permission set because the field sales representatives need to access, view, and interact with already-created Tableau Next metrics in the Agentforce Life Sciences mobile app. Their role is to consume performance information, such as Visit Plan Attainment, rather than create, edit, publish, or administer Tableau Next assets. The scenario confirms that the required implementation work is complete: the metrics exist, the Tableau View component is on the Mobile Home Page Lightning record page, and the mobile metadata cache has been refreshed. An insufficient-privileges message at runtime therefore points to the user's missing Tableau Next access entitlement.

Assigning Tableau Next Consumer gives a representative the access intended for viewing Tableau Next content and using the metrics surfaced through the embedded Tableau View experience. This follows least-privilege practice by granting the access needed to consume the analytics without extending authoring or management capabilities. Salesforce's Tableau Next documentation describes the Tableau Next experience and its role-based access model, while the Life Sciences Cloud documentation covers the use of Tableau Next insights within the industry application. See [Salesforce Help: Tableau Next](#) and [Salesforce Help: Tableau Next for Life Sciences Cloud](#).