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Salesforce Certification Preparation for Service Cloud Consultant

Salesforce CRT-261

Version Demo

Total Demo Questions: 34

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Topic Break Down

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QUESTION NO: 1

Universal containers is looking for ways to provide more proactive support and to promote its brand on the internet with minimal investment. A consultant recommends installing the Social Customer Service Start Pack.

Which two feature should the consultant recommend as part of the deployment?

A. Select two Twitter or Facebook accounts.

B. Create and assign permission sets to give agents social account access.

C. Retrieve Social Studio credentials.

D. Enable the Moderation feature to automatically create cases from posts.

ANSWER: A B

Explanation:

The Social Customer Service Start Pack is designed to provide an economical entry point for handling customer service interactions on supported social channels from within Salesforce. “Select two Twitter or Facebook accounts.” is appropriate because the deployment begins by connecting the organization’s chosen social identities, allowing agents to monitor and engage with customer posts and messages through the Service Cloud social-service workflow. Selecting the accounts also lets the organization focus its initial rollout on the channels most relevant to its customers and brand presence.

“Create and assign permission sets to give agents social account access.” is also an essential deployment activity. Social customer service access must be granted to the agents who will monitor, respond to, and manage conversations for the connected accounts. Permission sets provide a controlled, scalable way to assign the required social-service capabilities without broadly changing every agent’s profile. This supports least-privilege access while enabling the service team to provide timely public or private responses in the appropriate social context. Salesforce describes social customer service as a way to bring social engagement into service operations and route relevant interactions to the right teams. See Salesforce’s Social Media Customer Service overview and Permission Set overview.

QUESTION NO: 2

Cloud Kicks is preparing to support customers through SMS text messaging and WhatsApp. Support agents will need to easily switch between multiple customer conversations. Which two features will help meet the requirements?

Choose 2 answers

A. Social Customer Service

B. Service Console

C. Messaging

D. Chat

ANSWER: B C

Explanation:

Service Console is designed for high-volume support work in a unified agent workspace. Its console-style interface lets agents open and manage several records, cases, and customer interactions at the same time using tabs and subtabs. This gives agents an efficient way to move among active customer conversations without repeatedly leaving the service workspace. The console can also surface related customer data, knowledge, and productivity tools alongside the conversation, helping agents retain context while handling multiple requests.

Messaging provides asynchronous digital customer-service conversations in Service Cloud. Salesforce Messaging supports channels including SMS and WhatsApp, allowing messages to be routed to agents and handled in the agent workspace. Because messaging conversations persist over time, customers and agents can resume an interaction without requiring both parties to remain continuously connected. Combining Messaging with the Service Console gives Cloud Kicks both the required SMS and WhatsApp channels and an interface built for agents to manage and switch among concurrent service interactions. See Salesforce Trailhead's [Messaging overview] and [Service Console Basics] for implementation concepts and agent-workspace capabilities.

QUESTION NO: 3

Which feature should a consultant recommend to assign a case to a Tier 2 service queue so the Tier 2 service agent knows how far the Tier 1 service agent had progressed in troubleshooting the case?

A. Path for Cases

B. Slack message

C. Escalation Rules

D. Case Comments

ANSWER: D

Explanation:

Case Comments is the appropriate feature because it provides a persistent, chronological record of the troubleshooting work completed on a case before it is handed off to another support tier. A Tier 1 agent can add comments that document diagnostics already performed, customer-provided details, reproduction results, attempted resolutions, and the next recommended action. When the case is assigned to the Tier 2 queue, the Tier 2 agent can review those comments directly on the case and continue the investigation without having to repeat completed work or obtain the same information again.

Case Comments can be marked as internal by clearing the Public checkbox, allowing service teams to share operational troubleshooting notes without exposing them in customer-facing communications. This makes them suitable for preserving handoff context while maintaining an auditable case history. The case owner or automation can perform the queue reassignment, while Case Comments supplies the essential troubleshooting context needed by the receiving agent. Salesforce documents case comments as records associated with cases and describes how public visibility is controlled. See [Salesforce Help: Case Comments] and [Trailhead: Case Management].

QUESTION NO: 4

Cloud Kicks provides support to customers in email, social, and chat channels. Managers want to find a way to improve service agent efficiency.

A recent study found agents spend a lot of time searching for articles, manually copying text from the article, and pasting it into responses.

What should a consultant recommend as a solution?

A. Set up quick text options in the utility bar to add article links.

B. Configure Lightning Knowledge component and related list actions.

C. Configure Lightning Knowledge component to auto attach article PDF.

ANSWER: B

Explanation:

Configure Lightning Knowledge component and related list actions. This configuration puts Salesforce Knowledge directly in the agent's service workspace, reducing the need to leave the record they are working on, search elsewhere, and manually reproduce approved article content. The Lightning Knowledge component enables agents to search and review relevant published knowledge while handling a customer interaction. Knowledge actions on supported records provide a guided way to associate useful articles with the case or interaction and use article content in the service process. This makes the approved knowledge base easier to discover and reuse consistently across email, social, and chat work.

The recommendation directly addresses the identified inefficiency: agents can locate relevant answers in context and use Knowledge capabilities rather than repeatedly copying and pasting text. It also helps standardize customer communications around maintained, approved content, while preserving the connection between the service record and the article that helped resolve it. Consultants should ensure that the relevant Knowledge settings, user permissions, article publication status, and page layouts are in place so agents can access the component and actions where they work. Salesforce's Knowledge learning material describes how agents search and use articles in Lightning Experience: Salesforce Trailhead: Knowledge Basics for Lightning Experience. See also Salesforce's Knowledge overview documentation.

QUESTION NO: 5

Which feature should a consultant recommend to prompt a Tier 2 service representative to take over case processing from Tier 1 and know how far Tier 1 had progressed in troubleshooting?

A. Path for Cases

B. Escalation Rules

C. Einstein Next Best Action

ANSWER: A

Explanation:

Path for Cases is the appropriate recommendation because it presents a visual, stage-based process directly on the Case record. The organization can define the Case Status values that represent its troubleshooting workflow and configure each step with the most relevant key fields, guidance, and links to supporting resources. When a Tier 2 representative opens a case, the highlighted Path stage immediately communicates where the case is in the process, while the fields and guidance associated with that stage provide the operational context needed to continue the work without restarting the investigation.

For example, the path can guide representatives through intake, initial diagnosis, advanced troubleshooting, and resolution stages. Tier 1 can update the case status and key troubleshooting fields as work is completed; Tier 2 then sees the current progress and the prescribed next activities when assuming ownership. This creates a consistent handoff experience, promotes adherence to the support process, and makes the required case information visible at the point of work. Salesforce Path supports tailored guidance for each stage and can be configured for objects such as Cases. See Salesforce's Path overview and the Trailhead module on creating paths.

QUESTION NO: 6

Cloud Kicks wants to view cases resolved on the nrst cal. Pecs nave been trainee to use Save & Close when creating a Case. An existing Closed Case repot must be modified to show ftrst call resolution.

What is the recommendeo report change to meet the requirements7

A. Filter or Cosed When Created equals true

B. Filter on Status equals Ctosea Resolved

C. Filter where Dete/Time Opened equals Created Date

D. Filter where Closed Date equals Created Date

ANSWER: A

Explanation:

Filtering the Closed Case report on **Closed When Created equals true** directly identifies cases that agents resolved at the time the case was initially created. When an agent uses Save & Close during case creation, Salesforce marks the case as having been closed when created. This standard Case field is therefore the appropriate indicator for first-call resolution in this scenario: it measures whether the case was completed in the same interaction in which it was logged, rather than merely whether it eventually reached a closed status. Adding this criterion to the existing report ensures that the report returns only cases meeting the organization’s defined first-call-resolution process. The filter can be applied through the report builder using the standard Case field, with the value set to true. Salesforce documents the Case object and its standard fields in the Case Object Reference. For guidance on adding and managing criteria in reports, see Salesforce Trailhead’s Filter Reports unit.

QUESTION NO: 7

The Universal Containers' customer support organization has implemented Knowledge Centered Support (KCS) in its call center. However, the call center management thinks that agents are not contributing new knowledge articles as often as they should.

Which two should the company do to address this situation? Choose 2 answers

A. Measure and reward agents based on the number of new articles submitted for approval.

B. Measure and reward agents based on the number of new articles approved for publication.

C. Create a dashboard that includes articles submitted by agents and approved for publication.

D. Require agents to check a box on the case when submitting a new suggested article.

ANSWER: A C

Explanation:

“Measure and reward agents based on the number of new articles submitted for approval” is appropriate because KCS depends on making knowledge creation part of the support workflow. Recognizing agents for contributing useful draft articles reinforces the expected behavior at the point where the agent has direct control: identifying a knowledge gap and submitting content based on a customer interaction. The measure should be used as a coaching and adoption indicator, with attention to usefulness and quality rather than treating article volume alone as the end goal.

“Create a dashboard that includes articles submitted by agents and approved for publication” provides visibility into both contribution activity and the article lifecycle. Managers can monitor whether knowledge is being captured, see contribution trends by agent or team, and identify whether drafts are progressing to publication. That visibility supports targeted coaching, recognition, and process improvements while giving the organization a practical way to assess knowledge-program adoption. Salesforce Knowledge supports structured article creation, review, and publication processes, and reporting can be used to track the related operational outcomes. See Salesforce Trailhead: Knowledge Article Management and Salesforce Help: Salesforce Knowledge Overview.

QUESTION NO: 8

How should a Consultant provide Suggested Article functionality to Lightning Service Console users?

A. Add the Knowledge Component to the Service Console.

B. Add the Knowledge tab to the Console app.

C. Create email templates with Knowledge Articles attached.

D. Add the Suggested Article widget to the Case page layout.

ANSWER: A

Explanation:

Add the Knowledge Component to the Service Console. In Lightning Experience, the standard Knowledge component can be placed on a Lightning record page used by the Service Console, such as a Case record page. When an agent opens a case, the component provides contextual article recommendations by using the case’s information to surface relevant Salesforce Knowledge content. Agents can review the suggested articles directly in their workspace and open an article to read, share, or use its content while resolving the customer’s issue. This places knowledge assistance in the agent’s existing case-handling flow rather than requiring a separate navigation step. The component is configured through Lightning App

Builder and is available only when Salesforce Knowledge is enabled and users have the appropriate Knowledge permissions and access to the relevant article data categories. Salesforce's Service Console learning materials describe using console components to give agents contextual tools in their workspace, while the Knowledge documentation covers enabling and exposing knowledge to service users. See [Salesforce Trailhead: Set Up the Lightning Service Console]() and [Salesforce Help: Salesforce Knowledge Overview]().

QUESTION NO: 9

Cloud Kicks (CK) wants to provide its authenticated customers with a top-tier support

experience. CK Ants to allow asynchronous conversations, conversations across devices, and

Estimated Wait Time transparency. CK currently uses an external website to deliver its chat support

offering.

What should a consultant recommend to provide these newer capabilities?

A. Einstein Bots

B. Messaging for Web

C. AppExchange package

ANSWER: B

Explanation:

Messaging for Web is the appropriate recommendation because it brings Salesforce Messaging capabilities to Cloud Kicks' existing external website. Unlike a traditional web chat session, web messaging supports persistent, asynchronous conversations: a customer can leave the site and return later without needing to restart the interaction. For authenticated customers, Salesforce can associate the messaging session with the known customer identity, allowing the same conversation to continue across supported devices and sessions. This creates a more continuous support experience while retaining the context that agents need to assist effectively.

Messaging for Web also supports Estimated Wait Time visibility, giving customers clearer expectations before and during engagement with support. It is designed for modern, ongoing digital support interactions rather than only real-time, browser-bound chat. A consultant should therefore recommend deploying Messaging for Web in place of, or as an upgrade from, the current website chat offering, then configure authentication and routing according to Cloud Kicks' service processes. Salesforce describes the channel and its deployment approach in its [Messaging for In-App and Web overview]() and [Messaging for Web deployment documentation]().

QUESTION NO: 10

Universal Containers' customers prefer speaking to a live support agent for complex product issues. This results in a high volume of phone calls

and customer dissatisfaction about long hold times.

Which functionality should the consultant recommend to address the problem?

A. Embedded Chat window

B. Contact requests

C. Web-to-Case

ANSWER: A

Explanation:

Embedded Chat window is the appropriate recommendation because it gives customers a real-time, agent-assisted support channel directly within Universal Containers' website or customer portal. Customers with complex issues can initiate a conversation while they are already viewing relevant product, account, or help content, rather than waiting in a telephone queue. This preserves the customer preference for live assistance while distributing demand away from the phone channel and reducing perceived and actual hold times.

Salesforce chat capabilities also enable service teams to route incoming chat requests to the appropriate available agents using skills, capacity, and queue-based routing. Agents can manage concurrent conversations where appropriate, use preconfigured responses, and access customer context in the Service Console. These capabilities help improve responsiveness without requiring a proportional increase in phone staffing. When configured with appropriate hours, routing, and escalation processes, an embedded chat experience provides a practical live-support alternative for complex product questions and supports a more efficient omnichannel service operation.

See Salesforce's [Chat implementation overview] and [Omni-Channel routing documentation] for details on deploying and routing live customer conversations.

QUESTION NO: 11

Universal Containers' support team requires its customers to submit their support inquiries via free form email (Outlook, Gmail, Yahoo, etc). Additional requirements are listed below:

• Support attachments up to 30 MB per inquiry

• Over 10,000 inquiries per day

What solution should a consultant recommend to meet these requirements?

A. Emall-to-Case

B. Customer Chatter groups

C. Web-to-Case

D. On-Demand Email-to-Case

E. An external email-intake service integrated with Salesforce to create Cases and store or associate large attachments.

ANSWER: E

Explanation:

An external email-intake service integrated with Salesforce to create Cases is the appropriate solution because it can accept free-form messages sent from any standard email provider while being designed for the stated attachment size and sustained intake volume. The service can receive and validate the full email, retain the 30 MB attachment in an external repository or upload it to Salesforce Files as appropriate, then use Salesforce APIs to create the Case and associate the message and file metadata. This architecture also supports durable processing through queues, retries, monitoring, and rate management, which are important when daily volume exceeds 10,000 inquiries.

This approach is necessary because native Salesforce inbound-email processing has platform limits that must be considered when designing email integrations. In particular, Apex inbound email handling documents a maximum email size of 25 MB, so a requirement for a 30 MB attachment cannot be guaranteed by native Email-to-Case processing alone. The integration should also account for the organization's Salesforce API and storage entitlements, and preserve a link to externally stored content when retaining large files outside Salesforce is preferred. See Salesforce's [InboundEmail documentation] and [Email-to-Case documentation].

QUESTION NO: 12

The support manager at Universal Containers is getting inaccurate agent performance reports. After researching the data, the Salesforce admin

has identified hundreds of cases that are closed but still owned by a queue.

Which solution should a consultant recommend?

A. Use Data Loader periodically to assign these cases to a default owner.

B. Create a case validation rule to ensure cases are owned by a user when closed.

C. Create a case assignment rule to ensure cases are owned by a user when closed.

ANSWER: B

Explanation:

Create a case validation rule to ensure cases are owned by a user when closed. A validation rule runs whenever a user attempts to save a record and can prevent the save when specified conditions evaluate to true. In this scenario, the rule should identify a Case whose Status is being set to a closed value while the Owner is a queue, then display an error requiring reassignment to an individual user before closure. This establishes a consistent ownership standard at the point the Case is closed, so historical and future agent-performance reporting can reliably associate completed work with the responsible agent.

The implementation should account for the organization's configured closed Case statuses, rather than assuming that a particular status label is always used. The rule can use Case owner information and the closed-state logic supported by the Case object to enforce the requirement regardless of the channel through which the Case is updated. Validation rules are declarative, apply consistently to supported record updates, and provide immediate feedback to the person or automation attempting to close the Case. Salesforce documents validation-rule behavior in its Validation Rules Trailhead module and describes Case fields and ownership in the Case object reference.

QUESTION NO: 13

Universal Containers wants to let its customers interact in real time with support agents from their computers and mobile devices.

Which feature should a consultant recommend to meet this requirement?

A. Einstein Chat Bot

B. Service Cloud Voice

C. Digital Engagement

ANSWER: C

Explanation:

Digital Engagement is the appropriate recommendation because it extends Service Cloud customer service to digital messaging and chat channels, allowing customers to engage support teams in real time from web and mobile experiences. A consultant can configure channels such as Messaging for In-App and Web, WhatsApp, SMS, Facebook Messenger, and other supported digital channels according to the organization's service strategy. These conversations are handled in Salesforce and can be routed to appropriately skilled and available agents using Omni-Channel, helping provide a connected, responsive support experience.

For the stated need, Messaging for In-App and Web is especially relevant: it enables an organization to embed a messaging experience in its website or mobile app, so customers can begin a conversation on the device they are using. Agents receive and manage the work in the Service Console, with customer context available to support effective service. Digital Engagement is therefore the Service Cloud feature set designed to enable the requested real-time, cross-device digital interactions. Salesforce documents its supported digital channels and deployment options in the Digital Engagement overview and describes implementation of web and in-app messaging in Messaging for In-App and Web.

QUESTION NO: 14

universal containers wants to schedule technicians for repair services when an agent is unable to solve customer problem via call center

A. Omni channel

B. Contact Requests

C. field service

D. Mobile connect

ANSWER: C

Explanation:

Field Service is the appropriate Salesforce solution for arranging onsite repair work when a contact-center agent cannot resolve a customer's issue remotely. It extends service operations from the call center into the field by enabling teams to create and manage work orders, define the required service tasks, and schedule service appointments for the right technician. Dispatchers can use the Field Service scheduling and dispatch capabilities to assign appointments based on factors such as technician skills, territory, availability, and travel considerations. Technicians then use the Field Service mobile app to view assigned work, access relevant customer and asset information, complete service tasks, capture required details, and update the status of the work in Salesforce. This creates a connected workflow from the initial customer interaction and case through to onsite resolution, while maintaining a complete service history. Field Service is specifically designed for organizations that deliver installation, maintenance, inspections, and repair services at customer locations. Salesforce describes these core capabilities in its Field Service overview and explains how dispatchers schedule and optimize appointments in the Field Service Dispatcher Console documentation.

QUESTION NO: 15

Universal Containers (UC) plans to implement Salesforce Knowledge for its U.S. Call Center to assist agents in providing customer support.

Which three options should UC consider when planning its implementation?

Choose three answers

A. What types of information they need to publish.

B. Who can approve and manage the information published.

C. How information should be categorized.

D. Where call center support agents are located.

E. When the knowledge maintenance window is available.

ANSWER: A B C

Explanation:

Knowledge implementation planning should begin with defining **what types of information they need to publish**. A useful knowledge base is built around the support content agents need to resolve customer issues, such as troubleshooting instructions, FAQs, policies, and procedural articles. UC should also establish **who can approve and manage the information published**. Knowledge requires clear governance: designated authors create and maintain content, while reviewers or approvers validate that articles are accurate, compliant, and ready for agent use. Finally, UC should determine **how information should be categorized**. A consistent taxonomy, using Salesforce Knowledge data categories and other article organization features, helps agents find relevant, approved content quickly while working on cases. These decisions collectively define the content strategy, ownership model, and findability of the knowledge base before articles are created or released. Salesforce's implementation guidance emphasizes planning article content, roles, workflows, and category structures so that users can efficiently create, manage, and locate knowledge. See Salesforce Help: Set Up Knowledge and Trailhead: Set Up Knowledge.

QUESTION NO: 16

Universal Containers wants to implement Knowledge to assist agents with the resolution of cases.

Which three recommendations should a consultant make to meet this requirement? Choose 3 answers

A. Enable article customization for open cases.

B. Enable agents to create their own personal articles.

C. Enable suggested articles on new cases.

D. Enable article submission during case close.

E. Create an email template to send articles as PDF attachments.

ANSWER: A C D

Explanation:

To make Salesforce Knowledge useful directly within the case-resolution workflow, agents should be able to find relevant content as soon as they start working a case, tailor knowledge to the customer's specific situation, and capture newly discovered solutions. Enabling suggested articles on new cases surfaces potentially relevant Knowledge articles from case information, reducing the time agents spend searching and helping them apply approved answers consistently. Enabling article customization for open cases supports adapting article content in the context of an active customer interaction, so the response is relevant while preserving the knowledge-driven workflow. Enabling article submission during case close lets agents submit a proposed article when a case reveals a reusable solution, which supports continual improvement of the knowledge base through the appropriate review and publication process. Together, these capabilities make Knowledge both a source of guidance during active work and a mechanism for retaining support-team expertise after resolution. Salesforce describes using Knowledge with cases and article suggestions in its Knowledge and Cases documentation, and its Salesforce Knowledge Basics module explains how Knowledge helps service teams find and share answers.

QUESTION NO: 17

Universal Containers is using the Lightning Service Console for managing cases and wants to add a softphone to enable click-to-call capability.

Which three configurations are needed for the softphone to work in Salesforce? Choose 3 answers

A. Install an adapter from AppExchange to work with third-party CTI systems.

B. Enable Live Agent in their community to chat with an agent.

C. Assign the correct Salesforce users to the Call Center.

D. Create a softphone layout and assign to user profiles.

E. Assign the Salesforce CTI license to Salesforce users.

F. Add an Open CTI Softphone utility item to the Lightning Service Console app utility bar.

ANSWER: A C F

Explanation:

For a Lightning Service Console softphone, Salesforce needs an Open CTI integration, the users who can access that integration, and a console location in which the phone is exposed. Installing an adapter from AppExchange to work with third-party CTI systems supplies the connector between Salesforce Open CTI and the telephony provider. The adapter can also be a custom Open CTI adapter, but an AppExchange adapter is a standard supported way to provide the required telephony integration.

Assigning the correct Salesforce users to the Call Center associates those users with the call-center definition provided by the CTI adapter. This makes the adapter's call-control and screen-pop behavior available to the intended agents. Finally, adding an Open CTI Softphone utility item to the Lightning Service Console app utility bar makes the phone available in the Lightning console UI, allowing agents to open and use it while handling cases. Salesforce's Open CTI documentation describes the adapter and call-center setup model, while the Lightning app documentation covers configuring utility-bar items for console apps. See Salesforce Open CTI Developer Guide and Salesforce Help: Configure a Utility Bar.

QUESTION NO: 18

A contact center manager wants to measure improvements to operations after the implementation of a new workforce management system.

A contact center manager wants to measure improvements to operations after the implementation of a new workforce management system.

Which two metrics can be used to assess the success of the new workforce management system? Choose 2 answers

A. Number of calls offered

B. Agent utilization

C. Quality monitoring score

D. Schedule adherence

ANSWER: B D

Explanation:

Agent utilization and **Schedule adherence** are direct operational measures of whether workforce management is improving how effectively the contact center deploys its people. Agent utilization measures the proportion of an agent's available working time spent productively handling customer work, such as customer interactions and associated wrap-up activity. A workforce management implementation should improve utilization by aligning staffing levels and schedules more closely with forecasted demand, while still allowing for required breaks, training, and other planned activities.

Schedule adherence measures the extent to which agents are available and perform the activities assigned in their planned schedules at the intended times. This is especially relevant after implementing workforce management because accurate forecasts and optimized schedules only produce operational benefits when actual agent activity follows those schedules. Monitoring adherence helps a manager determine whether staffing plans are being executed consistently and whether schedule design or operational coaching needs adjustment.

Together, these metrics show both efficient use of staffed time and reliable execution of workforce plans. Salesforce describes workforce engagement capabilities as helping organizations optimize employee performance and customer service operations; see Salesforce Workforce Engagement and Salesforce Trailhead: Service Cloud Basics.

QUESTION NO: 19

Universal Containers (UC) receives partner data in Excel format. The Excel data is all text, but needs to be imported into existing Salesforce Date, Number, and Text fields.

Which three best practices should a consultant recommend?

Choose 3 answers

A. Import the records and create a workflow rule to change the data type.

B. Standardize all rows to match Salesforce data types.

C. Import the records and use Duplicate Management.

D. Deduplicate the data before importing into Salesforce,

E. Install the Data Quality Analysis Dashboards from the AppExchange.

ANSWER: B D E

Explanation:

Standardize all rows to match Salesforce data types. is essential because import files must contain values Salesforce can interpret correctly for their target fields. Before loading, UC should convert and normalize text values into supported date formats, valid numeric values without inconsistent symbols or separators, and consistently formatted text. This preparation reduces rejected rows, prevents unintended field values, and makes the imported information usable in reporting, automation, and service processes.

Deduplicate the data before importing into Salesforce, is also a core data-quality practice. Partner spreadsheets often contain repeated records, inconsistent naming, or records that already exist in Salesforce. Cleansing and matching the source data before the load helps UC avoid creating duplicate customer, contact, or service-related records and supports a more reliable system of record.

Install the Data Quality Analysis Dashboards from the AppExchange. supports ongoing monitoring after data preparation and import. Data-quality dashboards can help administrators identify completeness, consistency, duplicate, and validity issues so UC can measure the quality of partner data and prioritize remediation over time. Salesforce's import guidance emphasizes preparing and cleaning source data before an import, while Salesforce data-management learning materials describe maintaining data quality as a continuing operational responsibility. See Salesforce Help: Import Data into Salesforce and Salesforce Trailhead: Data Quality.

QUESTION NO: 20

The contact center at Universal Containers offers support through phone, email, public website, and a Community. The contact center manager wants to demonstrate the success of recent self-service initiatives to executive management. Which two reports should the contact center manager present to executive management? Choose 2 answers

A. Number of cases closed by self-service users.

B. Average call handle time by team.

C. Number of Knowledge articles created each month.

D. Number of cases created using Communities by month.

ANSWER: A D

Explanation:

"Number of cases closed by self-service users" is a direct outcome metric for self-service. It quantifies incidents resolved by customers through self-service resources rather than requiring agent-led resolution, helping leadership understand the practical contribution that self-service makes to support delivery. As this value grows over time, it demonstrates that customers are successfully finding and using available self-service capabilities.

"Number of cases created using Communities by month" measures adoption of the Community as a digital support channel. Monthly trending makes the result meaningful to executives because it shows whether customers are increasingly choosing the Community to obtain help and initiate support requests. Together, these reports provide complementary evidence: one shows successful customer-led resolution, while the other shows use of the Community channel. They can be reviewed alongside broader service trends to demonstrate the reach and impact of the self-service program. Salesforce describes Experience Cloud sites as a way to provide customers with self-service access to support content and processes, and Salesforce Knowledge supports publishing information that customers can use to resolve issues. See Salesforce Experience Cloud and Salesforce Knowledge Base.

QUESTION NO: 21

Universal Containers wants to allow customers to send messages to agents in Service

Console via their preferred mobile app.

Which feature should a consultant recommend?

A. Einstein Bots

B. OmniStudio

C. Messaging

ANSWER: C

Explanation:

Messaging is the appropriate Service Cloud feature because it enables asynchronous, persistent conversations between customers and service agents across supported digital messaging channels. Customers can begin a conversation in a mobile messaging app and continue it without needing to remain online while waiting for a response. When the customer sends a message, Salesforce routes the work item to an available agent using Omni-Channel, and the agent handles the conversation in the Service Console through the Messaging session experience. This supports the stated goal of meeting customers on their preferred mobile app while giving agents a unified console workspace for managing service interactions. Messaging channel configuration can support options such as WhatsApp, Facebook Messenger, SMS, and in-app or web messaging, depending on the organization's enabled products and channel setup. It also retains conversational context, helping agents provide continuous, personalized service rather than treating every reply as an isolated interaction. Salesforce describes Messaging as a way to communicate with customers through the channels they already use, while enabling agents to respond from Salesforce. See Salesforce Help: Messaging Overview and Salesforce Help: Messaging Channels.

QUESTION NO: 22

Cloud Kicks (CK) uses Lightning Knowledge and has set up Data Categories. CK uses Data Category Visibility to control access based on products and geographic location. The admin plans to enable 'Use standard Salesforce sharing' in Sharing Settings under Knowledge Settings.

Which consideration should the admin be aware of when making this change?

A. Data Category Visibility of All Categories provides Public Read-Only access.

B. Data Category Visibility of Custom overrides organization-wide default sharing access.

C. Data Categories no longer control access to articles.

ANSWER: C

Explanation:

Data Categories no longer control access to articles. Enabling *Use standard Salesforce sharing* changes the access model for Lightning Knowledge from data-category-based visibility to the standard Salesforce record-sharing model. After this setting is enabled, access to knowledge articles is determined through Knowledge object permissions, organization-wide defaults, role hierarchy behavior where applicable, sharing rules, manual sharing, and other standard sharing mechanisms. This is a significant design decision because the existing product- and geography-based access segmentation implemented through Data Category Visibility no longer determines which articles a user can read. The administrator should therefore plan and validate an equivalent standard-sharing design before enabling the setting, including confirming that the appropriate users have the required Knowledge permissions and that article records are shared to the intended groups of users. Salesforce documents this setting as an alternative article-access model, allowing organizations to manage article visibility using the same sharing concepts used for other Salesforce records. See Salesforce Help on sharing knowledge articles and the Trailhead overview of Knowledge access and visibility.

QUESTION NO: 23

A company has created a new onboarding process. An Agent must create ten open activities that align to a step of this onboarding experience. Creating these activities can take up to 20 minutes each to complete.

What should the Agent recommend to minimize costs?

A. Assign a single agent to create the activities on all new onboarding cases.

B. Provide a macro that will automatically create the activities when executed.

C. Add an object-specific custom quick action to create new activities.

D. Hire a certified developer to write an apex trigger that creates each new activity.

ANSWER: B

Explanation:

Provide a macro that will automatically create the activities when executed. Macros are designed to improve agent productivity by automating repeatable, multistep work in the Salesforce console. In this onboarding process, the same set of ten open activities is needed for each relevant case. A macro can perform the predefined record-creation steps consistently after an agent runs it, eliminating the substantial manual effort otherwise required to create every activity individually. This directly reduces operating cost by shortening handling time, allowing agents to focus on work that requires judgment, and ensuring that the onboarding steps are created in a standardized way. The macro remains a declarative, maintainable solution that service teams can adjust as the onboarding process evolves, without introducing a custom-code maintenance burden for this repetitive agent workflow. Salesforce describes macros as tools that let users complete a series of actions with a single click or keyboard shortcut, making them appropriate for high-volume, repeatable service tasks. See Salesforce Trailhead's Create Macros unit and Salesforce Help's Macros Overview for macro capabilities and setup guidance.

QUESTION NO: 24

Support agents need to verify that customers are eligible to receive customer support before they can update the

Which two objects are used to verify that a customer is entitled to receive support? Choose 2 answers

A. Contacts

B. Products

C. Service contracts

D. Case history

ANSWER: A C

Explanation:

Contacts and **Service contracts** are used in Salesforce entitlement management to establish and validate a customer's right to support. A contact represents the individual customer interacting with support. Entitlements can be associated with a contact, allowing agents and automated processes to determine whether that specific person is covered and what level of service applies when a case is created or updated.

A service contract records the agreed support terms between the organization and its customer. Service contracts can contain entitlements that define the support coverage provided, such as eligibility dates, applicable support processes, and service-level milestones. Associating entitlement records with a service contract lets Salesforce apply the contractual support agreement to the customer's cases. Together, contact-level identification and the governing service contract enable agents to confirm support eligibility and ensure the appropriate entitlement process is used. Salesforce can also evaluate entitlement eligibility through related account or asset records when those are part of the organization's support model.

For Salesforce's overview of entitlement management and its relationship to service contracts, see Salesforce Trailhead: Get Started with Entitlements and Salesforce Help: Entitlement Management Overview.

QUESTION NO: 25

Universal Containers receives more than 10,000 support emails each day. The company wants incoming emails to create Cases automatically and route Cases differently depending on the email address used by the customer.

Which two configurations should a Consultant recommend? Choose 2 answers

A. Configure the Email-to-Case agent.

B. Configure Email-to-Case routing addresses.

C. Enable Web-to-Case on the customer website.

D. Create a Quick Text message for each support address.

ANSWER: A B

Explanation:

Email-to-Case provides the automated intake capability required to create Cases from customer emails without agent data entry. For a high-volume implementation, the Email-to-Case agent can retrieve inbound messages and forward them to Salesforce for Case creation.

Routing Addresses identify the inbound support email addresses that Salesforce processes. Each routing address can be associated with Case settings such as a Case origin, priority, record type, or assignment behavior. This allows Universal Containers to direct messages sent to different support addresses into the appropriate service process. See [Salesforce Help: Email-to-Case]().

QUESTION NO: 26

Universal Containers support management team has noticed an increase in wait times over the last several months when customers call in for support.

Which two recommendations should a consultant suggest to help decrease customer wait times?

Choose 2 answers:

A. Set up analytical snapshots to capture key case information and create historical trending reports

B. Set up a Salesforce Customer Community that will allow customers to create cases online

C. Create reports to analyze call data in order to understand peak times and ensure adequate staffing

D. Create case escalation rules to route high priority cases directly to supervisors for resolution

ANSWER: B C

Explanation:

Setting up a Salesforce Customer Community that will allow customers to create cases online gives customers a convenient alternative to calling support. By enabling authenticated self-service through an Experience Cloud site, customers can submit case details at any time and can also be directed to relevant knowledge content before or while requesting assistance. This deflects contacts from the phone channel, reducing inbound call volume and helping agents spend more time on issues that require live support. Salesforce describes Experience Cloud as a way to create digital experiences for customers and provide access to service processes such as case management.

Creating reports to analyze call data in order to understand peak times and ensure adequate staffing addresses wait time through operational planning. Historical data on call volume, time of day, day of week, and case intake patterns lets service managers identify recurring demand peaks. They can then align agent schedules, shifts, skills, and capacity to the periods when callers are most likely to queue. Salesforce reports provide the mechanism to organize and analyze service data so managers can make evidence-based staffing decisions and monitor whether changes improve service performance over time.

References: Salesforce Help: Experience Cloud overview; Salesforce Help: Reports overview.

QUESTION NO: 27

Universal Containers is publishing Salesforce Knowledge articles to an Experience Cloud customer self-service site. Customers should see only articles intended for external users and only articles within the product categories to which they have access.

Which two configurations should a Consultant recommend? Choose 2 answers

A. Set Customer channel visibility on externally available articles.

B. Configure data category visibility for external users.

C. Assign external users the Knowledge User feature license.

D. Create a separate Knowledge object for each customer segment.

ANSWER: A B

Explanation:

Customer channel visibility determines whether published Knowledge articles are available to authenticated external users. Articles intended only for internal agents should not be visible through the Customer channel.

Data category visibility controls the categories of Knowledge content that users can access. Assigning the appropriate data category visibility through profiles or permission sets lets Universal Containers restrict product content for specific external audiences while allowing internal agents to retain broader access. Salesforce Knowledge uses channel visibility and data categories to control article availability. See Salesforce Help: Salesforce Knowledge Overview.

QUESTION NO: 28

What are three best practices that should be used when deploying Salesforce functionality to production? Choose 3 answers

A. Ensure that at least 60% of the code is covered by unit tests before deploying to production.

B. Plan and communicate the deployment to all users of the organization in advance.

C. Select a window of time when users will NOT be making changes to the organization.

D. Ensure all users refrain from logging into production for an entire day prior to deployment.

E. Migrate a test deployment to a staging environment for a smoother real-life experience.

ANSWER: B C E

Explanation:

Planning and communicating the deployment to all users in advance is a core release-management practice because it sets expectations about the change, its timing, possible service effects, and any user actions or training required. Selecting a deployment window when users will not be making changes reduces the risk of conflicting edits, deployment validation issues, and user disruption while production configuration and metadata are being updated. Migrating and testing a deployment in a staging environment provides an important rehearsal before production: the team can validate dependencies, test the deployment sequence, confirm expected behavior, and refine rollback or contingency procedures using an environment that more closely represents the production release. Together, these practices support controlled releases, reduce operational risk, and help ensure that the production deployment is predictable for both administrators and end users. Salesforce recommends validating deployments before production and using appropriate sandbox environments as part of a managed development and release process. See Salesforce Developer Guide: Deploy Changes and Trailhead: Plan Your Deployment.

QUESTION NO: 29

Universal Containers plans to migrate its existing knowledge base into Salesforce Lightning Knowledge. Which three statements should be considered?

Choose 3 answers

A. Attachments and .html files in Classic Knowledge are moved to the Files object.

B. Visualforce pages refer to Classic article types.

C. Each article must be associated to a record type.

D. Approval process history migrate to Lightning Knowledge.

E. Article numbers change during migration.

ANSWER: A B E

Explanation:

Attachments and .html files in Classic Knowledge are moved to the Files object. During the migration from Salesforce Classic Knowledge, legacy article attachments and HTML-file content are handled as Salesforce Files, so the organization should review how those files are surfaced to agents and customers after migration. This is important for preserving access to existing supporting documents and embedded content.

Visualforce pages refer to Classic article types. Lightning Knowledge replaces Classic Knowledge article types with record types, so any Visualforce customization, integration, URL logic, or automation that identifies an article by its Classic article type requires review and updating as part of the migration plan. This dependency assessment helps prevent custom knowledge experiences from failing after the data model changes.

Article numbers change during migration. The migration creates Lightning Knowledge article records and can assign different article numbers from those used by the Classic Knowledge records. Teams should therefore identify any documentation, integrations, bookmarks, reports, or external systems that rely on article numbers and plan to update those references. Salesforce documents these migration behaviors and planning considerations in Migrate Your Salesforce Classic Knowledge Base to Lightning Knowledge and provides broader Knowledge implementation guidance in the Knowledge Setup Trailhead module.

QUESTION NO: 30

After migration from Knowledge to Lightning Knowledge , Authors are unable to cretae FAQ article type , but can succefull create Install Notes article

type.SupportMngers have confirmed that articles of type FAQ exist in production.

How shoud a consultant correct this problem?

A. Grant Authors acess to FAQ artcle type

B. Set Article Or Wide to Public Read Write

C. Add Authors to the FAQ data category

D. Grant authors access to the FAQ records type

ANSWER: D

Explanation:

Grant authors access to the FAQ record type. When Salesforce Knowledge is migrated from Classic Knowledge to Lightning Knowledge, the former article types are converted into record types on the Knowledge object. The record type assigned to a user controls the types of Knowledge articles that user can create, as well as the page layout and available picklist values for those articles. Because the authors can successfully create Install Notes articles, they already have the relevant Knowledge permissions and access to at least one article record type. Their inability to create FAQ articles specifically indicates that the FAQ record type has not been made available to their profile or permission set. A consultant should update the applicable profile or permission set so the FAQ record type is assigned and available for use by the author population. After this access is granted, authors can select the FAQ record type when creating a Knowledge article. Salesforce documents that record types determine the business processes, page layouts, and picklist values available to users, and that record-type access is configured through profiles and permission sets. See [Salesforce Record Types documentation]() and [Salesforce Knowledge migration documentation]().

QUESTION NO: 31

Universal Containers wants to provide its resellers a secure portal where they can manage their customer accounts, submit and track the status of their cases, and view reports and dashboards.

Which solution should a consultant recommend?

A. Employee Community

B. Partner Community

C. Reseller Community

D. Customer Community

ANSWER: B

Explanation:

Partner Community is the appropriate solution because it is designed for organizations that work with external business partners, including resellers, distributors, brokers, and agents. A partner portal gives authenticated partner users secure access to the Salesforce information and collaboration capabilities needed to manage relationships with their own customers. This directly supports the requirement for resellers to manage customer accounts, create and monitor cases, and access the reporting and dashboard information that their permissions allow.

In current Salesforce terminology, these experiences are implemented with Experience Cloud, while the underlying partner-user licensing and capabilities are commonly described as partner access. Administrators can use sharing settings, roles, permission sets, profiles, and Experience Cloud site configuration to ensure each reseller sees only the accounts, cases, reports, and dashboards appropriate to that reseller. Salesforce identifies partner experiences as the model for extending CRM access to channel partners so they can manage leads, opportunities, and service-related work with the organization.

For more information, see Salesforce's Experience Cloud overview and its partner portal overview.

QUESTION NO: 32

Which three tasks should be included in a business continuity plan for a contact center? Choose three answers

A. Route cases to agents in an alternate center.

B. Disable the Interactive Voice Response system.

C. Deliver training on case handling for contingent staff.

D. Update the case status field values.

E. Monitor service level agreements (SLAs) and notify customers.

ANSWER: A C E

Explanation:

A contact center business continuity plan should preserve customer access to service, maintain enough qualified capacity to handle work during an outage, and keep customers informed when service commitments could be affected. "Route cases to agents in an alternate center." supports continuity by shifting work away from an unavailable location or team while retaining centralized case visibility and ownership controls. Salesforce routing capabilities can direct incoming work to available agents and queues, helping organizations operationalize an alternate staffing model.

“Deliver training on case handling for contingent staff.” is essential because backup personnel must be prepared to use the organization’s service processes, escalation paths, knowledge resources, and customer communication standards before a disruption occurs. A continuity plan is actionable only when replacement staff can assume work with minimal delay.

“Monitor service level agreements (SLAs) and notify customers.” supports proactive incident operations. During a disruption, teams need to identify cases at risk of missing response or resolution targets, prioritize them appropriately, and communicate realistic expectations to affected customers. Salesforce Entitlement Management provides tools for tracking service commitments and milestones, while Service Cloud capabilities support consistent case management across teams. See Salesforce Trailhead: Service Cloud Basics and Salesforce Help: Entitlement Management.

QUESTION NO: 33

Universal Containers (UC) needs to implement Service Cloud Voice. UC wants to protect its customers' sensitive data and ensure their privacy. UC also wants to use Voice calls for training purposes.

What should the consultant recommend?

A. Use Sensitive Data Rules to set Sharing Settings for the Voice Call record for the agent and the record owner.

B. Use Sensitive Data Rules to automatically mask sensitive information in Transcripts and Voice Call data.

C. Use Sensitive Data Rules to allow agents to Pause and Resume Voice Call recordings while sensitive information is exchanged.

ANSWER: C

Explanation:

Use Sensitive Data Rules to allow agents to Pause and Resume Voice Call recordings while sensitive information is exchanged. This configuration supports both stated requirements: UC can retain call recordings for coaching, training, and quality-management activities while preventing sensitive portions of a conversation from being included in the recording. A sensitive-data rule identifies when an agent must stop recording, such as when a caller provides payment-card details or other protected personal information. The agent can then resume recording after that information has been provided, preserving the useful non-sensitive portions of the interaction for later review.

In Service Cloud Voice, the ability to pause and resume recording is controlled through sensitive-data-rule configuration and requires an appropriate telephony implementation that supports call recording controls. The consultant should also ensure that agents are trained on the organization’s privacy procedure, including recognizing when a caller is about to provide protected information and resuming promptly once that exchange is complete. This approach minimizes sensitive-data retention in recordings while maintaining an effective training library. Salesforce documents the setup and operational considerations in Control Voice Call Recording and describes recording behavior for partner telephony in the Service Cloud Voice for Partner Telephony Developer Guide.

QUESTION NO: 34

The Contact Center at Universal Containers wants to increase its profit margins by promoting call deflection within Service Cloud.

Which two solutions should a Consultant recommend? Choose 2 answers

A. Knowledge Base

B. Customer Community

C. Automatic Call Distribution

D. Service Cloud Console

ANSWER: A B

Explanation:

Knowledge Base is a core call-deflection capability because it lets a contact center create, manage, and publish trusted answers to common customer questions. When customers can locate clear, searchable articles for issues such as setup, troubleshooting, billing, or product use, they can resolve routine needs independently rather than opening a case or calling an agent. Salesforce Knowledge supports article visibility for external audiences, making the same approved content available in self-service channels while giving agents a consistent source of guidance when assistance is needed.

Customer Community provides the customer-facing self-service destination through which customers can sign in, search for answers, access published knowledge, and engage with support resources. In current Salesforce terminology, these externally facing community experiences are delivered with Experience Cloud. Combining a customer self-service site with relevant Knowledge content is an effective strategy for reducing incoming call volume and lowering service costs, thereby supporting stronger profit margins. Salesforce describes Knowledge as a centralized knowledge base for customers and agents, and Experience Cloud as a way to build branded digital experiences for customers and other external users. See Salesforce Knowledge overview and Salesforce Experience Cloud overview.