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Salesforce Service-Cloud-Consultant

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Topic Break Down

Topic	No. of Questions
Topic 1, Industry Knowledge	19
Topic 2, Implementation Strategies	84
Topic 3, Service Cloud Solution Design	59
Topic 4, Knowledge Management	125
Topic 5, Interaction Channels	189
Topic 6, Case Management	142
Topic 7, Contact Center Analytics	78
Topic 8, Mix Questions	3
Total	699

QUESTION NO: 1

A report shows average time spent by agents to resolve cases. Nine of twelve agents spend approximately the same time to resolve cases. However, Agent A has a much shorter average time to resolve cases and Agents B and C have a much longer average time to resolve cases. How can the supervisor use this data to drive greater consistency in average time spent by agents across the team? Choose 3 answers:

A. Document and share the practices of Agent A with the team via knowledge articles

B. Lower the target for entire team to that of Agent A

C. Review case history and activities for Agents B and C

D. Build a dashboard to display individual performance by agent versus the team goal

E. Update case assignment rules to route more cases to Agent A

ANSWER: A C D

Explanation:

Documenting and sharing the practices of Agent A through knowledge articles enables the team to reuse efficient, repeatable approaches to diagnosis, customer communication, and case closure. This turns an individual agent's successful workflow into accessible operational guidance rather than leaving it as informal expertise. Salesforce Knowledge is designed to make approved information available to service teams where they work; see Salesforce Knowledge Basics.

Reviewing case history and activities for Agents B and C gives the supervisor the detail needed to identify the specific sources of longer resolution time. Case timelines, activity records, ownership changes, and related work can reveal patterns that support targeted coaching, process clarification, or knowledge improvements. This is a data-driven way to address the outlying performance while preserving appropriate case quality and complexity context.

Building a dashboard that displays individual performance against the team goal establishes ongoing visibility and a shared benchmark. Supervisors can monitor trends after coaching and process changes, while agents can see whether their resolution-time performance is converging toward the desired range. Salesforce dashboards provide visual summaries of report data for monitoring operational metrics; see Reports & Dashboards for Lightning Experience.

QUESTION NO: 2

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: C D E

Explanation:

Enabling suggested articles on new cases helps agents immediately discover relevant, approved Knowledge content while they investigate a customer issue. Salesforce uses case information, such as the subject and description, to surface articles that may help resolve the case, which reduces search time and encourages consistent answers. Enabling article submission during case close supports knowledge capture: when an agent resolves a new or recurring issue, they can submit the resolution for review and publication as a Knowledge article. This turns successful support interactions into reusable organizational content. Creating an email template to send articles as PDF attachments gives agents a consistent way to deliver documented resolutions to customers and lets customers retain the guidance outside the case interaction. Together, these capabilities support the full knowledge-centered service cycle: find relevant content during case work, capture new knowledge from resolved cases, and share useful content with customers. Salesforce describes using Knowledge with cases and agent workflows in its Salesforce Knowledge documentation and provides implementation guidance in the Set Up Salesforce Knowledge Trailhead module.

QUESTION NO: 3

Which Search mechanism should be used to find Case Comments from within the Lightning Service Console?

A. Comment Search Component

B. Comments List View

C. Global Search

D. Search Utility Component

ANSWER: D

Explanation:

Search Utility Component is the appropriate mechanism because it is designed for use in a Lightning console app's utility bar, giving agents persistent access to search without leaving their current workspace. In a service environment, this supports rapid investigation of case-related information, including comments, while an agent is working on a case or handling several console tabs. The utility remains available across the console, so an agent can open it, enter search terms, and locate the needed comment context without interrupting the active record workflow. This is particularly useful when a customer's issue references wording from a prior agent interaction or when support staff need to locate historical details captured in comments. Configure the Search utility as a utility item in the Lightning Service Console app so the relevant users can access it consistently. Salesforce's Service Console learning materials describe how console utilities provide always-available tools for agents, and Salesforce Help documents the configuration of Lightning console utility items. See Salesforce Trailhead: Service Console Basics and Salesforce Help: Lightning Console Apps.

QUESTION NO: 4

A contact center manager is looking for ways to overall cost per case.

What Salesforce metrics should the contact center manager evaluate? (Choose 2)

A. Average number of activities per case

B. Average number of articles attached to a case

C. Total number of cases by origin

D. Average customer satisfaction score by case

ANSWER: A B

Explanation:

Average number of activities per case is a direct indicator of the effort required to resolve a customer issue. Activities can include tasks, calls, emails, and events logged by agents. A higher average commonly represents more agent handling time and process effort for each case, both of which contribute to a higher operational cost per case. Tracking this metric lets a manager identify case types, processes, or service channels that require disproportionate effort and target them for automation, better routing, or improved agent guidance.

Average number of articles attached to a case helps measure how effectively Knowledge is supporting case resolution. Relevant knowledge articles give agents approved, reusable answers and troubleshooting steps, reducing research time and promoting consistent resolutions. Monitoring article use at the case level can help the manager assess whether agents have useful content available and whether investment in knowledge creation and maintenance is reducing the effort needed to close cases. Salesforce describes Knowledge as a way to make information available to agents so they can resolve customer issues efficiently. See Salesforce Knowledge overview and Salesforce Cases overview.

QUESTION NO: 5

Universal Containers has been testing an updated Service Console in a sandbox and is ready to move it to Production.

Which deployment solution should a consultant use?

A. Change Sets

B. Mass Transfer Records

C. Data Loader

D. Manual configuration

ANSWER: A

Explanation:

Change Sets is the appropriate solution for moving a tested Service Console configuration from a sandbox to its related production organization. An outbound change set is created in the sandbox, where the consultant selects the Service Console app and its dependent metadata as available, uploads it to production, and then validates and deploys the inbound change set there. This supports a controlled promotion process: the production deployment can be validated first, deployment status can be monitored, and the implementation is moved as metadata rather than reconstructed by hand.

Change sets are designed specifically for declarative migration between connected Salesforce organizations, such as a sandbox and its production org. The consultant should review the components and dependencies included in the change set before upload, because the console experience can rely on associated metadata, including app configuration, navigation items, objects, page layouts, permission sets, and Lightning pages. After deployment, the consultant can perform final production verification and assign the appropriate app access to users as needed. Salesforce documents the change-set workflow in its Change Sets overview and identifies deployable metadata in the Metadata Coverage Report.

QUESTION NO: 6

An Agentforce Service Agent needs to access and update Case records, retrieve information from Knowledge articles, and run flows to automate certain processes for unauthenticated customer sessions.

A. Use Organization-Wide Sharing Defaults (OWD) and filters at the topic/action level.

B. Use the "New Agent User" option and use principle of least privilege to apply specific permissions.

C. Grant the AI agent user the "System Administrator" profile for maximum compatibility.

ANSWER: B

Explanation:

Use the "New Agent User" option and use principle of least privilege to apply specific permissions. An Agentforce Service Agent performs work in Salesforce through its configured agent user context, so that user must be explicitly granted access required by the agent's assigned topics and actions. For this scenario, access should be deliberately scoped to the Case object and the required fields and records, the Knowledge content that the agent is permitted to retrieve, and the flows that the agent needs to invoke. The same security design remains important when an unauthenticated customer initiates a conversation: the customer's lack of authentication does not justify broadening the agent's Salesforce privileges. Instead, the agent user's permissions, sharing access, flow configuration, and any relevant data protections should permit only the defined service processes. Applying least privilege reduces the exposure of customer and case data while still allowing the agent to complete its supported tasks. Salesforce's Agentforce documentation describes the agent-user security model and emphasizes configuring access for the actions an agent performs; Salesforce's platform security guidance similarly recommends granting the minimum access needed for a job function. See the Salesforce Agentforce Developer Guide and Salesforce guidance on the principle of least privilege.

QUESTION NO: 7

Universal Containers needs to improve Customer Satisfaction, Average Handle Time, and First Call Resolution KPI scores across their Customer Service, Technical Support, and Field Service Contact Centers. Which two items should a Consultant consider to improve the KPI scores? Choose 2 answers

A. Service Console Knowledge Components

B. Service Console Profile Assignments

C. Data Categories and Article Actions

D. Data Categories and Article Types

ANSWER: A D

Explanation:

Service Console Knowledge Components are appropriate because they place relevant Salesforce Knowledge search and article information directly in the agent workspace. When agents can quickly search for, review, and share approved resolution guidance without leaving the console, they spend less time navigating systems and can provide more consistent answers. This directly supports lower Average Handle Time while helping agents resolve issues during the initial interaction, improving First Call Resolution and the customer experience.

Data Categories and Article Types are also important Knowledge design considerations. Article types organize knowledge into structures suited to different service content, such as troubleshooting instructions, FAQs, or procedures. Data categories classify and filter that content so it can be targeted to the applicable product, service, geography, or audience. Together, these capabilities help contact-center teams locate the most relevant, approved article quickly and deliver accurate, repeatable guidance. A well-structured and easily searchable knowledge base is a core enabler of faster resolutions and improved Customer Satisfaction across service channels. See Salesforce Trailhead's Knowledge Article Types unit and Knowledge Data Categories unit.

QUESTION NO: 8

What are two benefits of deploying Knowledge in Customer Communities?

A. Reduces incoming call volume

B. Replaces the need for an email channel

C. Eliminates tracking of customer entitlements

D. Uncovers gap in the knowledge base

ANSWER: A D

Explanation:

“Reduces incoming call volume” is a key benefit because publishing Salesforce Knowledge in a customer-facing community enables customers to find answers independently, at any time, without needing to contact a service agent. This self-service model deflects routine support requests and lets agents concentrate on issues that require direct assistance. Salesforce describes Knowledge as a way to make trusted answers available to customers through self-service channels.

“Uncovers gap in the knowledge base” is also a benefit because customer searches, article usage, and feedback reveal the information customers need but cannot readily find. Service teams can use search terms and unsuccessful searches to identify missing, incomplete, or poorly titled content, then create or improve articles to address those needs. This creates an ongoing feedback loop in which community behavior improves both the customer experience and the quality of the knowledge base. See Salesforce's Knowledge Basics learning module and its Knowledge search documentation for details on delivering self-service content and using search activity to improve knowledge.

QUESTION NO: 9

At Universal Containers, support reps need to verify that customers are eligible to receive support when they create the case.

Where can a support rep verify that a customer is allowed to receive support?

A. Milestones

B. Actions

C. Entitlements

ANSWER: C

Explanation:

Entitlements are the Salesforce mechanism for recording and verifying a customer's right to receive support. An entitlement represents the support level that an account, contact, or asset is eligible for under a service agreement, such as a maintenance plan or service contract. When a representative creates or reviews a case, the case's Entitlement field identifies the applicable entitlement record and lets the representative confirm that the customer is covered before handling the request.

Entitlement Management also supports applying the appropriate service process to the case. After an entitlement is associated with the case, Salesforce can use the related entitlement process to track service-level commitments, including milestone timing and escalation expectations. This makes entitlements the appropriate place to verify support eligibility at case creation while also providing the foundation for consistent SLA management throughout the case lifecycle.

For Salesforce's overview of entitlements and their role in defining the support customers receive, see Salesforce Help: Entitlement Management Overview. For implementation guidance, see Salesforce Trailhead: Entitlement Management.

QUESTION NO: 10

Universal containers has implemented salesforce knowledge and the service manager wants to encourage agents to use knowledge base. Which metric should the service manager monitor? (choose 1 answer)

A. Number of article votes

B. Number of customer ratings

C. Number of approved articles

D. Number of archived articles

ANSWER: A

Explanation:

Number of article votes is the most relevant metric for monitoring whether agents are engaging with Salesforce Knowledge. Article voting captures direct feedback from knowledge users on whether an article was helpful or useful. As agents search for, open, and apply articles while resolving cases, voting provides a practical signal that they are actively interacting with the knowledge base and assessing its value. The service manager can use vote activity and voting trends to identify articles that agents find useful, spot gaps where content needs improvement, and encourage a feedback-oriented knowledge-sharing culture. This supports continuous knowledge maintenance while reinforcing the desired agent behavior of consulting Knowledge during service work. Salesforce Knowledge is designed to help service teams find and use trusted answers in the flow of work, while feedback helps organizations improve the usefulness of their content over time. See Salesforce Trailhead's overview of Salesforce Knowledge and its guidance on creating and managing knowledge articles.

QUESTION NO: 11

A company has implemented Salesforce Service Cloud. The company needs Key Performance Indicators (KPIs) to ensure that its customer support service center is profitable. Which three metrics can be used to help executive management understand service center costs? Choose 3 answers

A. All open Cases by Priority

B. All open cases by Channel

C. All Cases closed Month-to-date

D. Case resolution time

E. All Cases by Customer

ANSWER: A B D

Explanation:

All open Cases by Priority, **All open cases by Channel**, and **Case resolution time** provide management with meaningful indicators of the resources required to operate the service center. The priority-based backlog shows the quantity and urgency of work still requiring attention. This supports staffing and escalation planning, since higher-priority cases commonly need faster response, more experienced agents, and potentially greater operational effort.

Channel-based open-case volume identifies where support demand is entering the organization, such as phone, email, web, messaging, or other channels. Each channel can have a different handling model and cost profile, so understanding the unresolved workload by channel helps leaders plan capacity and evaluate the cost implications of channel mix.

Case resolution time is a direct measure of the effort and elapsed time needed to complete support work. When considered with case volume and staffing costs, it helps management estimate cost per case, agent capacity, and the operational impact of process improvements or automation. Salesforce reporting and dashboards can surface these case metrics for operational and executive monitoring. See Salesforce Trailhead's Case Management overview and Reports and Dashboards implementation module.

QUESTION NO: 12

A customer-submitted case is routed to a service desk agent at Universal Containers. After the agent responds to the case, the agent realizes the customer is not eligible for support. Which solution should a consultant recommend to prevent this scenario from happening in the future?

A. Add the entitlement related list to account page layouts.

B. Add the entitlement lookup field to case page layouts.

C. Add a Validation Rule that ensures each Case has an entitlement.

D. Add a Validation Rule that ensures each Account has an entitlement.

ANSWER: C

Explanation:

Add a Validation Rule that ensures each Case has an entitlement. Entitlements represent a customer's support eligibility and can be associated with accounts, contacts, assets, and cases. Requiring an entitlement on every case creates a control at the point the case is saved: a customer-submitted case without a valid entitlement cannot be created or proceed through the normal service process. This prevents unsupported customers' cases from reaching an agent, rather than relying on the agent to identify eligibility only after reviewing or replying to the case.

For this approach to work effectively, Universal Containers should establish entitlement records for customers who are eligible for service and configure entitlement assignment as appropriate for its account, contact, or asset relationships. The validation rule can then enforce that the Case entitlement field is populated, including for cases created through customer-facing channels. This aligns eligibility verification with case intake and ensures agents work only cases covered by an applicable support agreement. Salesforce documents entitlement management and its relationship to cases in Entitlement Management, and documents using validation rules to enforce data-quality requirements in Validation Rules.

QUESTION NO: 13

Cloud Kicks uses Einstein Next Best Action to help service reps when working on a customer case. Multiple service reps work on the same case.

What should a consultant configure to show service reps when items were started, paused, resumed, and completed?

A. Activity analytics tab

B. Case History related list

C. Actions & Recommendations component

D. Action History component

ANSWER: D

Explanation:

The Action History component is designed to display the lifecycle history of Einstein Next Best Action actions on a record such as a Case. It gives service representatives a shared, chronological view of status changes, including when an action was started, paused, resumed, and completed. Because the history is associated with the record rather than an individual representative's session, each representative working the Case can understand the action's current state and the work already performed. This supports reliable handoffs and prevents representatives from losing context when ownership or participation changes.

A consultant should place the Action History component on the relevant Lightning record page, typically the Case record page, alongside the component used to present next-best-action recommendations. The recommendation experience helps users identify and act on guidance, while Action History provides the auditable status timeline needed for collaborative case handling. Salesforce documents Einstein Next Best Action configuration and its Lightning components in the Action History documentation and the Einstein Next Best Action Trailhead module.

QUESTION NO: 14

A recent analysis of cases at Cloud Kicks (CK) revealed a high percentage of simple cases such as

password resets and order inquiries. In order to reduce the number of cases created, CK wants to

provide customer self-service in the following channels: web, SMS, Facebook Messenger, and

WhatsApp.

What is the recommended case deflection solution?

A. Chat for Web and In-App

B. Digital Engagement Messaging

C. Social Customer Service

D. Einstein Bots

ANSWER: D

Explanation:

Einstein Bots is the recommended case-deflection solution because it automates common, repeatable customer requests before an agent or a case is needed. A bot can identify customer intent, ask guided questions, retrieve or update information through configured actions, and provide an answer or complete a simple process such as an order-status inquiry. For a password-reset scenario, the bot can guide the customer through the approved self-service flow or direct them to the appropriate reset experience.

Salesforce supports deploying bots across conversational service entry points, including web chat and Digital Engagement messaging channels. This enables Cloud Kicks to provide a consistent automated self-service experience for customers using SMS, Facebook Messenger, and WhatsApp, while escalating the conversation to an agent only when the request requires human assistance. Reducing these routine interactions before case creation directly supports the stated objective of lowering case volume while preserving a convenient omnichannel support experience. See Salesforce's Einstein Bots overview and Messaging channel documentation.

QUESTION NO: 15

The support manager at Universal Containers wants to improve visibility to cases across the organization and has decided that product managers should be more involved in the case management process. The support manager has created predefined case teams for each product and trained support agents to add the appropriate case team to each case.

Which solution allows product managers to quickly see and review the cases that are created for their products?

A. Configure a Case list view filtered by My Cases.

B. Configure a Case related list on the Product page layout.

C. Configure a Case list view filtered by My Case Teams.

ANSWER: C

Explanation:

Configuring a Case list view filtered by My Case Teams gives each product manager a focused, actionable view of the cases on which they have been added as a case-team member. A predefined case team can be associated with a case by an agent, and its members receive the access defined for that team. Because the teams are organized by product, adding the appropriate predefined team connects the relevant product managers to each product-related case without requiring case ownership to change. The My Case Teams list-view filter then dynamically returns cases involving the viewing user through case-team membership, allowing product managers to locate, review, and participate in their relevant cases quickly. This approach uses Salesforce's standard case-team feature and directly supports the requested organization-wide visibility while retaining a targeted, role-based experience for each manager. Administrators can make the list view available to the intended users and select useful columns, such as case number, subject, status, priority, and product, to support efficient triage. Salesforce documents how case teams provide defined case access and collaboration, and how list views filter and present records: Salesforce Help: Case Teams and Salesforce Help: Create and Manage List Views.

QUESTION NO: 16

A Service Representative transfers a Live Agent Chat to another Representative. Which two things will happen? Choose 2 answers

A. Both Service Reps can chat with the Customer.

B. The Customer does not know they were transferred.

C. The Chat Transcript and Case are transferred.

D. The Customer is shown the new Representative's Name

ANSWER: C D

Explanation:

When a representative transfers a Live Agent chat and the receiving representative accepts it, the conversation's associated work is handed over so service can continue with the relevant context. The Chat Transcript and Case are transferred, allowing the receiving representative to review the prior conversation and continue handling the same customer issue without creating a separate service record. The customer is also shown the new Representative's Name as part of the transfer experience, providing transparency about who is now handling the chat. This behavior supports a smooth handoff while preserving the customer-service history and ownership context needed for accurate case resolution. Salesforce documents chat transfers as a mechanism for moving an active chat to another available agent while retaining the conversation record and related case information. See Salesforce's Live Agent chat transfer documentation and the Service Console and Live Agent Trailhead module for related chat-routing and agent-handoff concepts.

QUESTION NO: 17

Universal Containers has recently implemented Chat and is looking for recommendations about how to improve agents' ability to find the appropriate answer while chatting with customers.

What should a consultant recommend to meet this requirement?

A. Einstein Reply Recommendations

B. Einstein Article Recommendations

C. Action & Recommendations component

ANSWER: B

Explanation:

Einstein Article Recommendations is the appropriate recommendation because it helps chat agents quickly locate relevant Salesforce Knowledge content while they are actively handling a customer conversation. The feature uses the context available from the interaction to identify and surface Knowledge articles that are likely to address the customer's question. Instead of requiring an agent to leave the chat workflow and manually search a large knowledge base, relevant articles can be presented directly in the service workspace, allowing the agent to review verified guidance and use it to deliver an accurate, consistent answer.

This supports a core Service Cloud objective: making approved organizational knowledge available at the point of service. For Chat implementations, the recommendation is especially valuable because agents need to respond promptly while maintaining answer quality. Administrators configure the Knowledge source and enable Einstein capabilities so that recommendations are based on articles the agent is permitted to access. Salesforce describes how Einstein can recommend Knowledge articles to agents from case and conversation context in its Einstein Article Recommendations documentation. See also Salesforce's Knowledge overview for how Knowledge provides reusable support information to service teams.

QUESTION NO: 18

Universal Containers needs to customize Salesforce to improve its Support Agents' experience so they can work more efficiently.

Which two features requires Service Cloud?

A. Open multiple case records as tabs and sub tabs

B. Unique page layouts for each Case Record Type

C. Utility Bar

D. Access to Knowledge Articles

ANSWER: A D

Explanation:

"Open multiple case records as tabs and sub tabs" is a Service Cloud capability because agents use the Service Console's workspace-style navigation to handle several customer interactions and related records without repeatedly leaving their working context. Console navigation presents records in primary tabs and related records in subtabs, which is designed for high-volume service work such as case management. Salesforce describes the console as a customizable workspace that lets service representatives view multiple records and tools in one place.

"Access to Knowledge Articles" is also a core Service Cloud capability. Salesforce Knowledge enables support teams to find approved internal articles while handling cases and to share useful content with customers through service channels. This helps agents provide consistent answers, shorten time to resolution, and capture reusable solutions. Access is controlled through Knowledge permissions and article visibility, allowing the organization to expose the appropriate information to internal users and, where configured, external audiences. These Service Cloud features directly support the stated goal of making support agents more efficient. See Salesforce's console app overview and Salesforce Knowledge overview.

QUESTION NO: 19

Universal Containers customers are encouraged to submit web cases when they find errors or omissions in product documentation. The information is captures on a case with the "Errata" record type. The Technical Writing Manager would like to send an email to the customer that includes details of the correction process.

What should a consultant recommend to meet this requirement?

A. Create a workflow rule and email alert action that sends an email to the case contact when a case with the "Errata" record type is created

B. Create an auto-response rule that sends an email to the case contact when a case with the "Errata" record type is created

C. Create an Apex trigger that sends an email to the case contact when a case with the "Errata" record type is created

D. Create an assignment rule that sends an email to the case contact when a case with the "Errata" record type is created

ANSWER: B

Explanation:

Create an auto-response rule that sends an email to the case contact when a case with the "Errata" record type is created. Case auto-response rules are designed specifically to acknowledge and respond automatically when customers submit cases through Web-to-Case. The rule can include an entry criterion that evaluates the Case record type, ensuring that the correction-process email is sent only for documentation-error submissions categorized as Errata. The associated email template can provide the Technical Writing team's expected review, validation, correction, and publication process, giving the customer an immediate and consistent acknowledgement without requiring manual agent action.

This is a declarative Service Cloud capability and is appropriate when the desired response is tied to initial web case submission. The recipient can be populated from the case's supplied email/contact information, and the template can use merge fields to personalize the response with case details. Salesforce documents that auto-response rules automatically send email responses to submitted cases, and that rule entries determine the conditions under which each response is sent. See Salesforce Help: Auto-Response Rules and Salesforce Help: Web-to-Case.

QUESTION NO: 20

Universal Containers has tested skills-based routing in a sandbox and is ready to deploy to Production.

Which two deployment solutions should a consultant use to ensure skills-based routing is operational in Production

Choose 2 answers

A. Data Import Wizard

B. Change Sets

C. Data Loader

D. Mass Transfer Records

ANSWER: B C

Explanation:

Change Sets and **Data Loader** should be used together because a complete skills-based routing deployment includes both metadata configuration and records that establish the skill assignments used at runtime. Change Sets provide a declarative way to move supported setup and routing configuration from a sandbox to its related production organization. This allows the consultant to deploy the configured routing framework as part of the production release process.

Data Loader is needed to migrate the data records that support the skills model, particularly the associations between service resources and their assigned skills. Those assignments determine which agents are eligible when Omni-Channel evaluates a work item's required skills. Loading the records into production preserves the tested skill coverage and enables routing to begin working with the intended agent population after the relevant configuration is deployed and activated.

Salesforce describes skills-based routing as matching work to agents based on the skills assigned to work and service resources. Review Salesforce's Skills-Based Routing documentation and the Data Loader documentation for supported data import and deployment practices.

QUESTION NO: 21

Using the Lightning Service Console, how can a contact center manager see which service reps are currently available to accept new cases?

A. Omni-Channel Utility component

B. Omni-Channel Analytics

C. Omni-Channel Supervisor tab

ANSWER: C

Explanation:

The **Omni-Channel Supervisor tab** gives contact center managers real-time operational visibility into Omni-Channel agents. In the Lightning Service Console, a supervisor can use this tab to see agents' current presence status, including whether they are available to receive routed work, as well as their assigned work and capacity. This immediate view supports day-to-day queue management: the manager can identify available service representatives, understand who is busy handling work, and make informed decisions about staffing or routing new cases. The Supervisor tab is intended specifically for monitoring active Omni-Channel operations rather than reviewing past performance, making it the appropriate workspace for determining who can accept a case at that moment. Salesforce documents the supervisor experience and its agent-workload monitoring capabilities in Monitor Agents with Omni-Channel Supervisor. For the underlying presence and capacity model that determines whether an agent can receive work, see Omni-Channel Presence.

QUESTION NO: 22

What are two design considerations for a Live Agent implementation? Choose 2 answers

A. Chat Visitor Browser

B. Chat Window Title

C. Chat Character Limit

D. Idle Connection Timeout

ANSWER: A D

Explanation:

Chat Visitor Browser and Idle Connection Timeout are important implementation design considerations because they directly affect whether customers can successfully start and sustain a chat session. Browser planning confirms that the chat deployment and its supported features work for the browsers used by the organization's customer base. This includes validating the visitor-side experience, such as the chat button, pre-chat forms, and the embedded chat window, on the target browser versions before production rollout. Salesforce's Live Agent developer documentation describes the visitor chat deployment and client-side components that must be incorporated into the web experience.

Idle Connection Timeout must also be deliberately configured because it governs how long an inactive chat connection remains open. The selected duration should balance customer convenience with operational concerns such as agent availability, stale sessions, and accurate workload management. Teams should define what constitutes inactivity, align the timeout with service policies, and communicate expected behavior in the chat experience. Salesforce documents timeout-related behavior as part of Live Agent chat configuration and session management. See the Salesforce Live Agent Developer Guide and Salesforce Help: Live Agent.

QUESTION NO: 23

Universal Containers wants Service Console users to be able to view and update product usage data that is stored in an external system.

Which two features should a consultant recommend to provide this functionality?

Choose 2 answers

A. Salesforce Connect

B. Custom Objects

C. Middle-tier integration

D. External Objects

ANSWER: A D

Explanation:

Salesforce Connect and **External Objects** together provide the appropriate architecture for exposing product-usage data that remains in an external system to Service Console users. Salesforce Connect is Salesforce's integration capability for accessing external data in real time, without first copying or synchronizing the complete data set into Salesforce. It connects Salesforce to supported external data sources through adapters such as cross-org, OData, or custom adapters.

External Objects are the Salesforce metadata representation of records held in that remote system. They can be related to standard and custom Salesforce objects and displayed in Lightning pages, related lists, and console workflows, enabling agents to see external product-usage information in the context of a customer or case. Where the external source, connector, and user permissions support write operations, agents can also update the external records through Salesforce; the changes are sent to the external system rather than stored as replicated Salesforce records. This design keeps the external system as the source of truth while giving console users a unified service experience. See Salesforce Connect overview and External Objects documentation.

QUESTION NO: 24

Universal Containers (UC) is planning to use Agentforce to enhance human and AI agent collaboration. A successful implementation should align with Agentforce's ability to support seamless transitions between AI agents and support reps.

Which specific aspect should UC prioritize when implementing Agentforce to improve customer support operations?

A. Integrate Agentforce responses with social media messaging to handle customer support questions.

B. Design Agentforce actions that enable handoffs to support reps when needed.

C. Focus on automating as many customer interactions as possible without AI agent involvement.

ANSWER: B

Explanation:

Design Agentforce actions that enable handoffs to support reps when needed is the priority because effective AI-assisted service depends on maintaining continuity when a customer's request requires human judgment, authorization, empathy, or specialized investigation. Agentforce can handle supported tasks conversationally, but its value in a service operation is strengthened when it is deliberately configured to recognize when it should transfer the interaction to a support representative. The handoff should preserve the customer's conversation history, the issue already identified, relevant record context, and any actions the AI has performed. This prevents customers from having to repeat information and enables the representative to continue resolving the case efficiently in the same service journey. UC should therefore design agent topics and actions with clear escalation criteria, capture the relevant context needed by the representative, and route the work to the appropriate service team or queue. This supports a collaborative operating model in which AI handles suitable requests while human reps take ownership of exceptions and more complex needs. Salesforce describes Agentforce as connecting AI agents with enterprise data and workflows, while Trailhead training emphasizes building agents that can act within defined topics and guardrails. See Salesforce Agentforce and Agentforce Basics on Trailhead.

QUESTION NO: 25

Cloud Kicks wants to use skills-based routing for product-support Cases. A Case requiring the Premium Products skill should only be routed to agents who are qualified for that product line.

Which two configurations are needed to define agent qualifications? Choose 2 answers

A. Create skills for each product qualification.

B. Assign skills to the appropriate service resources.

C. Create a support process for each skill.

D. Create a Knowledge record type for each skill.

ANSWER: A B

Explanation:

Creating skills allows Cloud Kicks to define qualifications such as Premium Products, Standard Products, or individual language capabilities. Skills represent the abilities that work items require and that agents possess.

Assigning skills to service resources identifies the agents who hold each qualification. Omni-Channel Skills-Based Routing compares skill requirements on a work item with the skills assigned to available service resources before selecting an agent. See Salesforce Help: Skills-Based Routing.

QUESTION NO: 26

Universal Containers provides Customer Support for two separate business operations. The cases managed for each operation have different steps and fields.

Which three features could be implemented to support this? Choose 3 answers

A. Omni-Channel

B. Page Layouts

C. Record Types

D. Support Processes

E. Article Types

ANSWER: B C D

Explanation:

Page Layouts, **Record Types**, and **Support Processes** work together to model distinct case-management requirements for separate business operations. Record types classify Case records by the applicable operation and let Salesforce present the appropriate business experience to agents. A case record type can be associated with a specific page layout and support process, ensuring that users see the fields, related lists, and interface arrangement relevant to the case they are handling.

Page layouts support the requirement for different fields by controlling which Case fields are displayed, their organization, and whether they are required or read-only for users assigned to each layout. This enables each operation to capture and present the information it needs without creating separate Case objects.

Support processes support different operational steps by defining the available Case Status values for each process. Associating a support process with the relevant case record type allows each business operation to use a status lifecycle that reflects its own workflow. Salesforce documents that case record types determine the available support process and page layout, providing a standard configuration pattern for differentiated support operations. See [Salesforce record type documentation]() and [Salesforce support process documentation]().

QUESTION NO: 27

Cloud Kicks (CK) wants to explore having a full Incident Management, Swarming, and Change

Management process to provide a foundation for its auditing and governance needs. CK also wants

interactive recommendations for every department during this process.

Besides implementing Incident Management and Service Cloud for Slack, what should a consultant

recommend for the full solution?

A. Implement flow orchestration with Work Guides

B. Implement a third-party app from AppExchange.

C. Implement Guidance for Success and Knowledge articles.

ANSWER: A

Explanation:

Implement flow orchestration with Work Guides is the appropriate recommendation because it supplies the guided, cross-functional process layer needed to support incident, swarm, and change-management operations. Flow Orchestration coordinates a business process that spans multiple stages, steps, users, queues, and departments. Each step can assign work to the appropriate participants, use record-triggered or screen flows to collect and update information, and retain a clear view of progress through the orchestration work items and related records. This makes it suitable for a governed process in which incidents must be assessed, investigated, approved, remediated, and reviewed by different teams.

Work Guides provide the interactive experience requested by Cloud Kicks. They present users with contextual, step-by-step guidance and actions as they work, so each department receives the relevant recommendations and tasks for its part of the process. Combined with Incident Management for the incident record model and Service Cloud for Slack for collaborative swarming, orchestration and Work Guides provide the structured workflow, accountability, and auditability that complete the solution. Salesforce describes Flow Orchestration as a way to automate complex, multi-user processes in its Flow Orchestration overview and documents the platform capabilities in the Flow Orchestrator Developer Guide.

QUESTION NO: 28

Cloud Kicks publishes Knowledge articles for customers in English, French, and Japanese. The company wants authors to maintain one article structure while providing customers with content in their preferred language.

What should a consultant recommend?

A. Enable multiple languages for Salesforce Knowledge and create article translations.

B. Create a Knowledge record type for each language.

C. Create a data category group for each language.

D. Create separate Knowledge bases for each language.

ANSWER: A

Explanation:

Enable multiple languages for Salesforce Knowledge and create article translations. Salesforce Knowledge supports translated versions of articles, allowing authors to maintain language-specific content associated with the same underlying article. Customers can then access published content in a supported language appropriate to their experience.

Data categories can classify content and article record types can control article structure, but neither capability provides translated article content. See Salesforce guidance on translating Knowledge articles.

QUESTION NO: 29

Universal Containers wants to reduce the clicks a Customer Support Agent uses when working on a case. This includes the time it takes to create, resolve, and close the case. Which three Salesforce productivity features should be used to accomplish this requirement? Choose 3 answers

A. Omni-Channel

B. Publisher Actions

C. Macros

D. Quick Text

E. Chatter

ANSWER: B C D

Explanation:

Publisher Actions, **Macros**, and **Quick Text** directly reduce the manual steps agents perform throughout the case lifecycle. Publisher Actions expose common, predefined tasks in the Lightning interface, allowing agents to quickly create records, update a case, log interactions, or invoke supported custom actions without navigating through multiple pages. This streamlines frequent work during case creation and resolution.

Macros are designed for repeatable, multi-step agent processes. An agent can run a macro to automatically carry out configured actions on a case, such as updating fields, applying values, sending communications, or changing the case status. This is especially useful for standard resolution and closure procedures that otherwise require repeated clicks.

Quick Text lets agents insert reusable messages into case comments, emails, chats, and other supported text fields. By selecting approved response snippets rather than repeatedly typing common language, agents respond faster and more consistently while handling and resolving cases. Together, these features address both record-processing and communication work, reducing clicks and handling time. See Salesforce's Quick Actions documentation and Macros documentation.

QUESTION NO: 30

Cloud Kicks ' customers use a proprietary ecommerce site to order customized shoes. While the shoes are being made, customers want to check their order status frequently.

Which method should the consultant recommend to provide automated self-service on an ecommerce site?

A. Configure a Visual Remote Assistant.

B. Create an Einstein Bot.

C. Build a Screen Flow.

ANSWER: B

Explanation:

Creating an Einstein Bot is the appropriate recommendation because it provides an automated conversational self-service channel that can be embedded in, or deployed alongside, the company's ecommerce experience. The bot can recognize an order-status request, collect or use authenticated customer and order information, and return the current status without requiring a service representative. For customized shoes, where customers may check progress repeatedly during manufacturing, this offers immediate, consistent responses at any time and reduces avoidable case volume.

Einstein Bots are designed for Service Cloud digital engagement and can guide customers through defined dialogs, present relevant information, and hand the conversation to an agent when automation cannot resolve the request. The bot can also invoke Salesforce automation to retrieve order information, allowing the status response to reflect the organization's order and production data rather than requiring manual updates from support staff. This makes it a scalable self-service solution for a proprietary web storefront. Salesforce describes bot setup and capabilities in its Einstein Bots documentation and provides implementation guidance in the Service Bots Trailhead module.

QUESTION NO: 31

Universal Containers (UC) has hired a consulting firm to implement Service Cloud for its

contact center for the first time. The project requires quick iterations and speedy completion. UC has

requested frequent updates from the project team for check-ins and refinement.

Which methodology should the consultant recommend given the requirements?

A. Waterfall

B. Hybrid

C. Agile

ANSWER: C

Explanation:

Agile is the appropriate methodology because the implementation calls for short, rapid iterations, frequent stakeholder check-ins, and regular refinement based on feedback. An Agile delivery approach organizes work into manageable increments, allowing the consulting team to prioritize the most valuable Service Cloud capabilities first, demonstrate completed functionality often, and adjust the backlog as UC learns more about its contact-center needs. This is especially valuable for a first-time Service Cloud implementation, where requirements such as case routing, console configuration, knowledge, and reporting can become clearer after users review working configurations. Frequent reviews create a structured opportunity for UC stakeholders to validate that the solution supports their agents and service processes before additional work is completed. Agile also supports speedy delivery by focusing each iteration on usable outcomes rather than waiting until the end of a long project phase to collect feedback. Salesforce's implementation guidance emphasizes collaboration, iterative delivery, and aligning solution work to business priorities. Learn more about Agile concepts in Salesforce's Agile Basics module and its application to delivery planning in Salesforce Project Management Basics.

QUESTION NO: 32

After migrating from Knowledge to Lightning Knowledge, Authors are unable to create FAQ article type, but can successfully create Install Notes articles type. Support Managers have confirmed that articles of types FAQ exist in Production.

How should a consultant correct this problem

A. Grant Authors access to the FAQ article type.

B. Set article Org Wide Default to Public ReadWrite.

C. Add Authors to the FaQ Data Category.

D. Grant Authors access to the FaQ record type

ANSWER: D

Explanation:

Grant Authors access to the FaQ record type. During migration to Lightning Knowledge, the former article types are represented as record types on the unified Knowledge object. The ability to create an article for a particular former article type therefore depends on whether the user's profile or permission set has that Knowledge record type assigned and available. Because Authors can create Install Notes articles, they already have the required Knowledge object access and article-creation capability. The inability to select or create FAQ articles specifically indicates that the FAQ record type has not been made available to those users.

A consultant should update the relevant Author profile or permission set to enable the FAQ Knowledge record type, and ensure it is available for article creation. Salesforce record type assignment controls which record types users can select when creating records; where a profile has multiple record types, a default can also be configured. This restores Authors' ability to create FAQ content while retaining the intended separation of article templates and processes established by the migrated article types. See Salesforce's guidance on migrating article types to Lightning Knowledge and record type access and assignment.

QUESTION NO: 33

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 help service teams complete repetitive, multi-step work consistently from the Salesforce user interface. For an onboarding case, the organization can configure a macro to perform the repeated activity-creation steps so that an agent executes the process rather than manually spending substantial time creating each of the ten activities. This reduces handling time and associated operational cost while also making the onboarding procedure more consistent across cases.

This approach uses declarative Service Cloud functionality that administrators can configure and maintain without the additional cost and delivery time of custom code. A macro is particularly appropriate when agents need to initiate the process in context and may need to review the case before running the standardized sequence. Salesforce describes macros as a way to automate repetitive tasks that agents perform, enabling faster and more consistent service work. See Salesforce's Macros overview and the Service Cloud macros Trailhead module.

QUESTION NO: 34

Which metric influences customer satisfaction? Choose 2 answers

A. After call work

B. Cost per call

C. First call resolution

D. Call quality

ANSWER: C D

Explanation:

First call resolution is a key customer-satisfaction metric because it measures whether a customer's issue is fully resolved during the initial interaction. Resolving the need without requiring a follow-up contact reduces customer effort, eliminates the inconvenience of repeating information, and helps customers reach an outcome more quickly. In a service operation, tracking first-contact resolution also helps identify whether knowledge, agent enablement, routing, and case-management processes are supporting effective issue resolution.

Call quality directly influences the customer's perception of the service experience. Quality evaluation can assess whether the agent listened actively, communicated clearly, demonstrated empathy, followed the appropriate process, documented the interaction accurately, and provided a useful resolution. These behaviors affect trust and confidence even when the underlying request is complex. Salesforce's Service Cloud guidance emphasizes using service metrics and feedback to understand and improve the customer experience, while its contact-center capabilities support consistent agent interactions across customer channels. See Salesforce Service Cloud and Salesforce Help: Omni-Channel.

QUESTION NO: 35

UC wants to provide its 20 million customers with a portal where they can: Submit inquires, Monitor the status of those inquiries, and View their contact information. To meet these requirements, which type of portal license would be most appropriate for the customers?

A. Partner portal

B. Service Cloud portal (Customer Community)

C. Enterprise admin

D. Sites

ANSWER: B

Explanation:

Service Cloud portal (Customer Community) is the appropriate choice because it is designed for a large external customer population that needs self-service access to support information. Customers can authenticate to the portal, create and view inquiries (typically represented by Case records), check the current status of their own requests, and access the contact-related information exposed to them through the portal's sharing and page configuration. This model supports customer self-service at very large scale, which is particularly important for an audience of 20 million customers. In current Salesforce terminology, this use case maps to an Experience Cloud customer self-service implementation using an external-user license suited to high-volume customers, such as Customer Community Login or Customer Community, depending on the organization's commercial agreement and access model. Salesforce Experience Cloud provides the portal experience, while Service Cloud provides the case-management capabilities that customers use to submit and monitor support inquiries. Access should be configured so each external user can see only their own contact and inquiry records. See Salesforce's Experience Cloud overview and external user license documentation.

QUESTION NO: 36

What are three considerations when adding a report chart to a Console Component?

Choose 3 answers

A. The report is shared with a Chatter Group.

B. The report contains a chart.

C. The report has a standard Report Type.

D. The report is a Summary or Matrix report.

E. The report chart is added to the Page Layout.

ANSWER: B D E

Explanation:

A report used for a console report-chart component must already contain a chart. The console component displays the chart defined in the source report; it does not create a chart from a tabular report at the time it is added. The report must also be a Summary or Matrix report. These report formats provide the grouping structure required to produce supported report charts, allowing agents to interpret aggregated operational data directly in the console.

The report chart is added to the Page Layout so that it is available in the console context in which agents work. This placement supports presenting relevant chart information alongside the record details and other console workspace elements, rather than requiring agents to navigate separately to the Reports tab. Administrators should configure the chart and report layout before making it available to console users, and ensure that the intended users have access to the underlying report data. Salesforce's documentation on adding report charts to Salesforce Classic console apps and report formats describes the chart and report-format prerequisites.

QUESTION NO: 37

Universal Containers email policy requires that all email traffic remain within its firewall. Currently, the company has 200 support agents handling

email from five different time zones.

Which solution should a consultant recommend?

A. Web-to-Case

B. Email-to-Case

C. Salesforce for Outlook

D. On-Demand Email-to-Case

ANSWER: B

Explanation:

Email-to-Case is the appropriate solution because it can use the Email-to-Case agent installed on a server inside Universal Containers' network. The organization's existing support mailbox receives customer emails internally, and the agent monitors that mailbox and creates corresponding cases in Salesforce. This architecture allows the company to retain control of inbound email processing within its firewall rather than forwarding customer email messages to a Salesforce-managed routing address. The agent sends case data to Salesforce through an outbound, secure connection, so it does not require opening inbound firewall ports or exposing the internal mail server to external access.

This approach is particularly suitable for a large, distributed support operation because all 200 agents can work from the centralized Case records in Salesforce regardless of time zone. Case assignment rules, queues, auto-response rules, and service processes can then manage and route the work consistently while the company's mail infrastructure remains the system that receives and retains the original email traffic. Salesforce documents the agent-based model and its support for processing email from behind a firewall in the Email-to-Case documentation and the Email-to-Case agent setup guide.

QUESTION NO: 38

Cloud Kicks has recently implemented two-way mobile messaging to increase the efficiency

of the support team. The company uses key performance indicators (KPIs) to measure the success of

the implementation.

Which metric should a consultant use to measure the effectiveness of two-way mobile messaging?

A. Average Handle Time

B. Reduced Call Volume

C. Total Open Cases

ANSWER: B

Explanation:

Reduced Call Volume is the most appropriate KPI because two-way mobile messaging gives customers an alternate, asynchronous channel for receiving support rather than requiring a phone conversation. Measuring whether inbound calls decline after messaging is introduced directly indicates whether customers are adopting the new channel and whether it is reducing demand on phone agents. This provides a meaningful measure of the implementation's intended efficiency benefit: agents can manage messaging work alongside other activities, while customers can continue a conversation without remaining on a call.

The metric should be evaluated over comparable periods, such as before and after launch, and ideally alongside messaging-session volume and customer-service outcomes. That context helps Cloud Kicks confirm that a reduction in calls reflects successful channel shift to mobile messaging rather than a general change in support demand. Salesforce describes Messaging as an asynchronous digital engagement channel that enables customers and service representatives to exchange messages over time. This characteristic makes call deflection or reduced call volume a particularly relevant implementation KPI. See Salesforce's Digital Engagement Basics and Messaging documentation.

QUESTION NO: 39

When migrating data from an older system to a new one, what steps should be taken? Choose 2 answers.

A. Data Cleansing

B. Data Normalization

C. Activate data validation rules

D. Data mapping

ANSWER: A D

Explanation:

Data Cleansing and **Data mapping** are essential preparation activities for a successful migration. Data cleansing improves the quality of the source data before it enters the new system. A project team should identify and resolve duplicate records, obsolete values, incomplete fields, inconsistent formats, and invalid contact details. This reduces the risk of carrying legacy data-quality issues into Salesforce and helps users trust the records they receive after go-live.

Data mapping defines how each source-system field, value, and relationship will be represented in the destination data model. The migration team documents the source fields, target Salesforce objects and fields, required transformations, default values, ownership, record types, and lookup relationships. Mapping also makes it possible to test import files and reconcile migrated record counts and values against the legacy system. Together, cleansing and mapping establish reliable source data and a repeatable process for transforming it into the structure Salesforce expects. Salesforce data-management guidance emphasizes preparing, cleaning, and correctly structuring data before import. See Salesforce Trailhead: Data Quality and Salesforce Trailhead: Data Management.

QUESTION NO: 40

what approach should a consultant use to ensure that knowledge search

only display articles for a servcie agents product specialization ?

A. Crreate an article action for each record type;assign record types to service agents

B. Create a page layout for each record type ;assign layouts to servce agents

C. Create a permission set for each record type ;assignpermisisons to service agents

D. create a data category for each product assign data categories to service agents.

ANSWER: D

Explanation:

Creating a data category for each product and assigning data categories to service agents is the appropriate approach because Salesforce Knowledge uses data categories to classify articles and control which articles users can access and find. A consultant can create a data category group for product specialization, add a category for each product, and associate the relevant articles with the applicable product category. The consultant then configures data category visibility so that the relevant service-agent audience has visibility only to the categories for its supported products. This makes Knowledge search results respect the agent's category visibility and limits the articles surfaced to those within that specialization. Data categories are designed for hierarchical article classification and audience filtering, making them suitable when product-based article access and search relevance are required. Salesforce documents data categories and category visibility as the mechanism for organizing Knowledge content and determining which categorized articles users can access. See Salesforce Trailhead: Organize Knowledge Articles with Data Categories and Salesforce Help: Data Categories.

QUESTION NO: 41

UC's 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 20MB per inquiry

Over 10,000 inquiries per day

Which solution should a consultant recommend to meet these requirements?

A. Email-to-Case

B. Web-to-Case

C. On-Demand Email-to-Case

D. Customer Chatter groups

ANSWER: A

Explanation:

Email-to-Case is the appropriate recommendation because it lets customers send unstructured support requests from ordinary email clients and converts those inbound messages into Salesforce cases. For the stated daily volume, the Email-to-Case agent deployment is the suitable implementation: the agent retrieves messages from the organization's email server and submits them to Salesforce, supporting high-volume inbound case processing without relying on the lower daily processing limit associated with the hosted, on-demand service. It also supports email attachments of up to 25 MB per email, which accommodates the requirement for attachments as large as 20 MB. The consultant should work with the customer's messaging team to deploy the Email-to-Case agent on a supported, continuously available machine, configure the relevant routing addresses, and ensure that email-server sizing and retention policies can sustain more than 10,000 messages each day. Salesforce documents the Email-to-Case setup and agent architecture in its Email-to-Case implementation guidance and describes applicable email and attachment limits in the Salesforce email limits documentation.

QUESTION NO: 42

Universal Containers' customer support management wants to provide proactive communications to customers who are likely to provide low customer satisfaction (CSAT) scores

Which two customer-related metrics should the customer support management analyze? Choose 2 answers

A. High priority cases opened by account month-to-date

B. Time spent by account year-to-date

C. Escalated cases by account month-to-date

D. New cases opened by account channel

ANSWER: A C

Explanation:

High priority cases opened by account month-to-date and escalated cases by account month-to-date are the most useful leading indicators for identifying customers who may be dissatisfied. A high-priority case represents an issue with meaningful business impact or urgency. When an account has several such cases in a short period, its contacts may experience disruption, repeated effort, or concern that their issue is not being resolved quickly enough. Monitoring this trend by account enables the service team to reach out before a satisfaction survey is submitted.

Escalated cases are an especially strong signal because escalation commonly reflects increased urgency, management visibility, or a need for additional support to resolve the issue. A month-to-date account-level view keeps the analysis focused on recent service experiences, which are most relevant to an upcoming CSAT response. Service managers can use reports and dashboards grouped by account to identify these customers, coordinate ownership, and initiate proactive recovery communications or status updates. Salesforce supports tracking case priority and escalation-related information in case records and reporting on case data. See Salesforce Case Fields and Salesforce Reports Overview.

QUESTION NO: 43

Cloud Kicks (CK) has rolled out a new Contact Center and is eager to understand the return on investment (ROI). CK has hired a Service Cloud Consultant to operationalize its reports. CK would like to understand the duration a case sp ends in each status.

A. Cases with Historical Trending report

B. Cases with Milestones report

C. Case Lifecycle report

ANSWER: C

Explanation:

Case Lifecycle report is the appropriate standard reporting capability because it is designed to analyze the time a case remains in each case status throughout its lifecycle. For a contact center measuring ROI, this provides operational evidence of where work is occurring and where cases are waiting. Teams can use the report to assess elapsed time in statuses such as New, Working, Escalated, or Waiting on Customer, then identify patterns that affect handling efficiency, agent workload, and the customer experience.

Case Lifecycle reporting is especially useful because status history alone shows that a status changed, whereas lifecycle analysis turns those changes into duration metrics that can be summarized and compared. For example, Cloud Kicks can group results by owner, queue, case type, priority, or date range to see whether a particular group of cases spends unusually long in a given stage. This supports targeted process improvements and helps establish measurable baselines before and after changes to the new contact center. Salesforce's Service Cloud analytics learning materials describe using case lifecycle data to understand time spent in case statuses and evaluate service-process performance. See Salesforce Trailhead: Analyze Your Service Cloud Data and Salesforce Help: Case Lifecycle Reports.

QUESTION NO: 44

Cloud Kicks is planning a Service Cloud implementation to reduce the time spent and improve the quality of agent messaging sessions with

customers. After discussions with leadership and the customer service team, the consultant determines that the biggest gains with the least amount of

effort for configuring a standard Einstein for Service feature are from automating standard responses.

Which feature meets this requirement most effectively?

A. Einstein Reply Recommendations

B. Einstein Article Recommendations

C. Einstein Case Wrap-Up

ANSWER: A

Explanation:

Einstein Reply Recommendations is the appropriate standard Einstein for Service capability because it provides agents with AI-generated suggested responses while they handle customer conversations in supported messaging channels. Rather than requiring agents to compose every routine answer manually, the feature analyzes the context of the conversation and presents relevant reply suggestions that an agent can review, edit if necessary, and send. This directly targets the stated objective of reducing time spent in messaging sessions while promoting more consistent, high-quality responses to common customer questions.

It also fits the requirement for a comparatively low-effort, standard configuration approach. Organizations can enable the feature for eligible messaging deployments and use it to augment the existing agent workflow, without designing a custom automation solution for each standard interaction. Agent review remains part of the process, helping ensure that suggested language is appropriate to the customer's specific situation before it is sent. Salesforce describes the feature and its setup considerations in Einstein Reply Recommendations and provides broader implementation guidance in Messaging for In-App and Web.

QUESTION NO: 45

Universal Containers (UC) wants to improve case management by assigning cases to agents

based on their relevant product specialization. UC also wants to automatically assign agents to the

next case to evenly distribute the case workload.

Which Omni-Channel feature meets the requirements?

A. Use the most available routing model.

B. Use Most Cases Closed report.

C. Use the agents' Presence Status.

D. Use skills-based routing with the most available routing model.

ANSWER: D

Explanation:

Use skills-based routing with the most available routing model. Omni-Channel skills-based routing enables UC to represent product expertise as skills and assign the appropriate required skill to each case. Agents are assigned the skills that reflect their product specializations, so Omni-Channel considers only agents who have the required expertise when it evaluates a case for routing. This directly supports matching product-related cases to qualified agents.

The routing configuration can use the Most Available routing model to select, among eligible and available skilled agents, the agent with the greatest remaining capacity. This makes assignment capacity-aware and helps distribute incoming cases across qualified agents rather than repeatedly routing work to the same person. Agent presence and capacity still determine whether an agent is eligible to receive work, while skills provide the specialization matching required by the scenario. Configure the skills, associate them with service resources, assign required skills to work items, and use a routing configuration that applies the most-available model. See Salesforce's Skills-Based Routing documentation and Omni-Channel routing models documentation.

QUESTION NO: 46

When designing a Case management solution to increase agent productivity, which Service Cloud features should you consider first? Choose 2 answers.

A. Case queues

B. Case custom reports

C. Case assignment rules

D. Case dashboards

ANSWER: A C

Explanation:

Case queues and **Case assignment rules** are foundational features for improving agent productivity because they automate and structure how incoming work reaches the appropriate support resources. Case queues provide centralized work pools for teams, allowing agents with queue membership to access unowned cases and ensuring that work is visible even when an individual agent is unavailable. Queues can also support prioritized routing by separating work according to product, region, language, customer tier, or issue type.

Case assignment rules complement queues by evaluating defined criteria when a case is created or updated and routing it automatically to the appropriate user or queue. This reduces manual triage, shortens the time before a case reaches a qualified agent, and promotes consistent handling of incoming requests. Together, these features establish an efficient intake and distribution process before the organization focuses on reporting and analytics. Salesforce documents how assignment rules automatically assign cases based on criteria and how queues enable teams to manage shared records. See Salesforce Assignment Rules documentation and Salesforce Queues documentation.

QUESTION NO: 47

Customers can contact Universal Appliances to report problems with their appliances within 30 days of delivery. Support agents need quick-view-only access to an external database the stores over 100,000 known product bugs logged by the product engineers. Which solution should a consultant design to meet this requirement? (Choose 2)

A. Display product bug data in Salesforce via a Visualforce page (or use Lightning Connect)

B. Use Web Services API to integrate the external database with Salesforce

C. Create a custom product bug object and import data into Salesforce

D. Use Bulk API to load the product bug data into Salesforce

ANSWER: A B

Explanation:

“Display product bug data in Salesforce via a Visualforce page (or use Lightning Connect)” is correct because the requirement is for quick, read-only visibility into a large data set that remains in an external product-engineering database. Salesforce Connect, formerly called Lightning Connect, supports data virtualization through external objects: agents can view external records in Salesforce without copying the full bug catalog into Salesforce storage. A Visualforce solution can likewise present externally retrieved information in the Salesforce user interface when a tailored display or integration approach is needed.

“Use Web Services API to integrate the external database with Salesforce” is also correct because web-service integration enables Salesforce to request bug information from the source system in real time. This supports a view-oriented experience and keeps the external database authoritative, rather than requiring synchronization of more than 100,000 bug records. The integration can expose only the fields agents need for issue handling and can be invoked from a custom user interface or an external-object integration architecture. Salesforce recommends Salesforce Connect where external data should be accessed without being replicated locally; API-based integrations are appropriate when Salesforce needs to communicate with external services. See Salesforce External Objects Overview and Salesforce Integration Patterns.

QUESTION NO: 48

Universal Containers wants to reduce the amount of time support agents spend creating cases. Case creation must scale up to 5,000 new cases per day and allow file attachments under 10 MB by the customer.

Which feature should the consultant suggest?

A. Web-to-Case

B. On-Demand Email-to-Case

C. Email-to-Case

ANSWER: A

Explanation:

Web-to-Case is the appropriate feature because it lets customers submit support requests directly from a company website, automatically creating Case records in Salesforce without requiring an agent to manually enter the case. This directly reduces agent effort while providing a customer-facing intake channel that can be embedded in an existing support page or portal experience.

The stated volume aligns with the standard Web-to-Case processing limit of up to 5,000 new cases in a 24-hour period. Web-to-Case also supports customer-uploaded attachments, subject to the configured form and applicable Salesforce attachment/file limits; an attachment below 10 MB fits the requirement. A consultant can generate the Web-to-Case HTML form in Salesforce, add the needed case-field inputs, and enable the attachment control so customer submissions contain both the issue details and the relevant file.

Salesforce documents Web-to-Case setup and its daily case limit in the Web-to-Case documentation. The feature is also covered in the Salesforce Trailhead Web-to-Case unit.

QUESTION NO: 49

Cloud Kicks asked a Service Cloud Consultant to help it determine its customer retention rate.

Which numbers does the consultant need to calculate an accurate rate?

A. Customers at the start of a given period, customers at the end of that period, and new customers acquired during that period

B. Customers at the start of a given period, customers at the end of that period, and old customers who returned during that period

C. Customers at the start of a given period, customers at the end of that period, and customers lost during that period

ANSWER: A

Explanation:

Customers at the start of a given period, customers at the end of that period, and new customers acquired during that period is correct because customer retention measures the proportion of an existing customer base that remains over a defined time interval. The standard calculation is: ((customers at the end of the period − customers acquired during the period) ÷ customers at the start of the period) × 100. Subtracting newly acquired customers is essential: they were not part of the population that the organization is evaluating for retention at the beginning of the period. The resulting percentage therefore reflects how successfully Cloud Kicks retained its starting customers rather than how much its total customer population grew.

The consultant should first establish consistent definitions for “customer” and the reporting period, such as active accounts with a purchase or active subscription. They should also ensure that the start and end counts use the same eligibility criteria so that the metric is comparable across periods. Retention is a key customer-success measure because it indicates the durability of customer relationships and can inform service, support, and experience-improvement decisions. Salesforce discusses the business importance of retaining customers in its [customer retention overview] and provides customer-success learning resources through [Trailhead].

QUESTION NO: 50

Universal Containers CFO is looking for ways to reduce contact center costs. Which customer service metric should the CFO monitor to reach the budget goals? (Choose 2)

A. First call resolution

B. Average handle time

C. Upsell percentage

D. Customer retention

ANSWER: A B

Explanation:

First call resolution and **Average handle time** are the key operational metrics for a CFO seeking to lower contact-center costs. First call resolution measures how often an issue is completely resolved during the customer's initial interaction. Improving this rate reduces repeat contacts, follow-up work, escalations, and the total number of agent interactions required to close cases. That directly lowers the cost to serve each customer while also helping service teams use available capacity more efficiently.

Average handle time measures the time agents spend handling a customer interaction, including talk, hold, and after-contact work where applicable. Monitoring it helps leadership identify process, knowledge, routing, and agent-assistance improvements that enable representatives to resolve work efficiently. A lower, appropriately managed handle time reduces labor cost per interaction and can increase the number of contacts handled with the same staffing level. These metrics should be evaluated together: efficient interactions must still achieve complete resolution, rather than merely shortening calls. Salesforce's service-management guidance emphasizes measuring service operations and using data to improve agent productivity and case resolution. See [Salesforce Trailhead: Service Cloud Basics] and [Salesforce: Customer Service Metrics].

QUESTION NO: 51

Universal Containers is experiencing system timeouts when running case reports. What should a consultant recommend to improve the performance of the reports? Choose 2 answers.

A. Remove formula fields from filter criteria.

B. Remove unnecessary columns from the reports.

C. Remove date boundaries from filter criteria.

D. Remove dashboards based on long-running reports.

ANSWER: A

Explanation:

Remove formula fields from filter criteria. Formula fields are calculated dynamically when Salesforce evaluates a report. When a formula field is used as report filter criteria, Salesforce can be required to calculate that formula across a potentially large set of Case records before it can determine which records belong in the result set. This additional processing can substantially increase execution time and can contribute to report timeouts, particularly for reports with high record volumes or complex formulas.

A consultant should instead recommend filtering on stored, selective fields whenever the business requirement permits it. For example, a value that must be frequently filtered can be maintained in a standard or custom field, allowing Salesforce to evaluate the filter more efficiently. This approach reduces the computation required during report execution and supports more predictable performance as the volume of cases grows. Salesforce's reporting guidance emphasizes thoughtful report design and limiting processing-intensive report logic. See Salesforce's Report Tips and Hints and the Reports and Dashboards Quick Look for reporting-design guidance.

QUESTION NO: 52

The project manager on a Service Cloud implementation is responsible for coordinating user acceptance testing (UAT) for a customer. Which tasks should be completed prior to UAT? (Choose 2)

A. Verification of the production migration checklist

B. Approval of test scripts from the business lead

C. Verification that sample data has been loaded

D. Fund customer approval on training materials

ANSWER: B C

Explanation:

Approval of test scripts from the business lead should occur before user acceptance testing because the business stakeholders must confirm that the planned scenarios reflect the agreed business processes, requirements, and expected outcomes. Approved scripts give testers a consistent, traceable set of steps and acceptance criteria to execute, while ensuring that the testing effort is focused on the functionality the customer considers important. This also supports clear defect reporting and enables stakeholders to determine whether the solution is ready for deployment based on documented results.

Verification that sample data has been loaded is also required before user acceptance testing begins. Testers need realistic records and relationships in the testing environment to perform meaningful end-to-end scenarios, such as creating and routing cases, validating customer information, applying entitlements, or confirming knowledge and service processes. Data availability helps confirm that configured automation, permissions, and page behavior operate as users will experience them. Salesforce recommends testing changes in a sandbox before production deployment, and its release-management guidance emphasizes validating functionality in an environment that appropriately represents the intended production use. See Salesforce Help: Test in a Sandbox and Salesforce Help: Deploy Changes.

QUESTION NO: 53

What is a common deflection technique to reduce the number of interactions for a contact center? Choose 2 answers.

A. Recommend articles during a call for a support agent

B. Suggest articles for a web-to-case question

C. Suggest articles for an email-to-case question

D. Recommend articles prior to a Live Agent session

ANSWER: B D

Explanation:

Suggesting articles for a web-to-case question is a deflection technique because it presents relevant Salesforce Knowledge content while a customer is seeking help through a web support form. When customers can find an answer in an article before submitting their issue, they may resolve the problem independently and avoid creating a case. This reduces incoming work for the contact center while still providing a support path for issues that genuinely require assistance.

Recommending articles prior to a Live Agent session similarly supports deflection at the point when a customer is about to start a chat. Salesforce can show relevant Knowledge articles before the chat is initiated, giving the customer an opportunity to self-solve common questions. If the article resolves the issue, the customer need not proceed to an agent interaction. This approach is especially useful for high-volume, repeatable questions and improves service capacity by reserving agent time for more complex requests. Salesforce describes Knowledge as a key self-service capability and documents chat-related article recommendations in its service features. See Salesforce Knowledge overview and Knowledge in Chat.

QUESTION NO: 54

UC wants to reduce incoming support phone call volume. What action can be taken to meet this requirement? Choose 2 answers.

A. Implement Service Cloud console to support agents

B. Leverage Live Agent for web-based chat

C. Enable service contracts and entitlements

D. Implement Salesforce Knowledge on a portal

ANSWER: B D

Explanation:

Leverage Live Agent for web-based chat and Implement Salesforce Knowledge on a portal directly support the goal of reducing incoming support phone calls by giving customers effective digital support channels. Web-based chat lets customers communicate with support representatives from a website rather than calling a phone line. In Salesforce, this capability is provided through Embedded Service deployment and Messaging for In-App and Web, the current evolution of Live Agent, allowing service teams to offer real-time assistance in a digital experience.

Publishing Salesforce Knowledge in a customer-facing portal or Experience Cloud site enables self-service. Customers can search for articles, troubleshooting steps, FAQs, and product guidance independently, resolving common issues without contacting an agent. Knowledge can also be surfaced in self-service experiences to make relevant answers easier to find before a customer submits a case or starts a conversation. Together, real-time web chat for assisted support and a searchable knowledge portal for self-service reduce reliance on telephone support while preserving access to help. See Salesforce's Live Agent documentation and Salesforce Knowledge overview.

QUESTION NO: 55

Universal containers would like to implement a solution to hold service reps accountable to customer service level Agreements. Which two steps are necessary to satisfy this requirement? Choose 2 answers

A. Set up Milestones.

B. Enable Work Orders.

C. Create an Entitlement Process.

D. Configure Service Contracts.

ANSWER: A C

Explanation:

Set up Milestones. and **Create an Entitlement Process.** are the necessary elements for tracking and enforcing service-level commitments in Salesforce Service Cloud. An entitlement process defines the timeline and sequence of support steps that apply to eligible cases. It is the mechanism that associates SLA-based timing requirements with case handling and can apply different processes according to the customer's entitlement. Milestones are the measurable, time-dependent targets within that process, such as the time to first response, time to resolution, or time to provide an update. Salesforce tracks milestone progress on cases and can use milestone actions, warnings, and escalation behavior to make agents and managers aware when an SLA target is approaching or has been missed. Together, entitlement processes establish the SLA framework and milestones provide the individual, auditable performance targets needed to hold service representatives accountable. This supports consistent service delivery and allows supervisors to report on compliance with customer commitments. See Salesforce's Entitlements overview and Milestones documentation.

QUESTION NO: 56

Universal Containers (UC) recently expanded sales to Mexico and Canada. UC wants OmniChannel to route cases to agents who speak the customer's preferred language and have the right

knowledge to solve the issue.

Which solution should a consultant recommend to meet the requirements?

A. Configure Omni-Channel Skills-based Routing.

B. Configure Case Assignment rule and Omni-Channel Supervisor.

C. Configure Omni-Channel Queue-Based Routing.

ANSWER: A

Explanation:

Configure Omni-Channel Skills-based Routing. This capability is designed to match incoming work with agents based on defined skills, making it appropriate when both a customer-language requirement and subject-matter expertise requirement must be evaluated before assignment. UC can define skills such as Spanish, French, English, or regional-language proficiency, alongside skills representing the relevant product, service, or knowledge domain. Administrators then associate the required skills with the case work item, typically through routing configuration and automation that derives requirements from case attributes such as the customer's preferred language, product, or issue type.

When Omni-Channel routes the case, it considers agents who possess the required skills and selects an available, appropriately capacitated agent. This helps ensure that the person receiving the case can communicate effectively with the customer and has the knowledge needed to resolve the request, rather than simply sending work according to queue membership. Salesforce documents skills-based routing as a way to route work to agents with the appropriate skills and proficiency levels. See Salesforce Help: Skills-Based Routing and Trailhead: Learn About Omni-Channel Routing.

QUESTION NO: 57

A case has not been closed even after 30 days, but those cases can be closed in 7 days. What should the consultant do to overcome this? choose 2 options

A. Use auto response rule to send an email

B. Use escalation rule to send an email

C. Supervisors to investigate those cases

D. Identify those cases and assign to the closure team

ANSWER: B C

Explanation:

"Use escalation rule to send an email" is appropriate because escalation rules monitor open cases against time-based criteria. The consultant can configure a rule entry that applies when a case remains open for seven days and then use an escalation action to send a notification to the responsible support lead, queue, or other designated recipient. This creates a timely and repeatable control rather than waiting until a case has aged for 30 days. Salesforce escalation actions can notify users by email and can be tailored through rule criteria, business hours, and escalation timing.

"Supervisors to investigate those cases" is also appropriate because an overdue-case notification needs an accountable operational response. Supervisors can review the case's status, ownership, blockers, priority, and customer impact; then ensure the work is progressed or reassigned as needed. They can also identify recurring causes of breaches, such as routing gaps, inadequate staffing, or missing knowledge, and improve the support process so that the seven-day resolution expectation is consistently met. Salesforce documents escalation rules as a mechanism for automatically escalating cases that are not resolved within a defined period. See Salesforce Help: Escalate Cases and Salesforce Help: Escalation Rules.

QUESTION NO: 58

UC wants to implement a Knowledge management process with the following requirements: It must contain four different kinds of content: customer FAQs, product specifications, contact center procedures, and product manuals. It must provide the ability to filter Knowledge search results by a single product, multiple products, or all 56 products. Any product-related content created by contact center agents must be approved by the contact center manager and the Knowledge manager before being published. Product content should only be visible internally to contact center agents who handle the product. How should a consultant recommend that Knowledge be configured?

Choose 3 answers.

A. Configure workflow rules for each data category

B. Configure article types for each kind of content

C. Define approval processes for each article type

D. Define approval processes for each product

E. Configure data category values for each product

ANSWER: B C E

Explanation:

Configure article types for each kind of content supports distinct Knowledge structures for FAQs, specifications, procedures, and manuals. Article types provide separate templates and fields so each content format can capture and present the information appropriate to that audience and use case. **Define approval processes for each article type** provides the required publishing governance. The approval process can route product-related articles through sequential approval steps so the contact center manager and Knowledge manager approve the content before publication.

Configure data category values for each product supports a product category group containing values for all 56 products. Data categories classify articles and make category-based filtering available in Knowledge search. They also support audience controls through data category visibility, allowing the organization to grant contact center agents access only to the product categories they support. This combines product-oriented search refinement with internal access segmentation, while maintaining a consistent Knowledge publishing process. Salesforce documents how article types organize Knowledge content and how data categories classify articles, filter search, and control visibility. See [Salesforce Knowledge article types] and [Salesforce Knowledge data categories].

QUESTION NO: 59

The contact center supervisors at Cloud Kicks recently implemented Omni-Channel and would like to monitor key metrics such as handle time, speed to answer, and active time. How can the Service Cloud Consultant achieve this requirement?

A. Install the prebuilt reports from the Service Setup Assistant.

B. Create a custom report type for Case Milestones.

C. Create a Case Lifecycle report.

ANSWER: A

Explanation:

Installing the prebuilt reports from the Service Setup Assistant is the appropriate approach because Salesforce provides out-of-the-box Omni-Channel reporting content intended for contact-center operational monitoring. These reports and related dashboards surface the metrics supervisors need to evaluate routing and agent-work performance, including average handle time, average speed to answer, and agent active time. Using the packaged content gives Cloud Kicks a standard analytics foundation immediately after implementing Omni-Channel, rather than requiring the consultant to model the underlying operational data and calculations manually. Supervisors can run the reports to review historical performance, identify workload or responsiveness trends, and tailor report filters, groupings, and dashboard presentation to the organization's queues, channels, and management needs. This supports the stated requirement for actionable Omni-Channel metrics while aligning with Salesforce’s supported reporting capabilities for service operations. Salesforce describes monitoring Omni-Channel work and performance in its [Omni-Channel for Service Cloud Trailhead module]; additional implementation guidance is available in the [Salesforce Omni-Channel documentation].

QUESTION NO: 60

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:

To increase knowledge creation in a Knowledge-Centered Service practice, Universal Containers should make contribution activity visible and recognize the behavior it wants agents to adopt. **Measure and reward agents based on the number of new articles submitted for approval.** This focuses recognition on the action agents directly control: documenting new or previously unavailable solutions while handling customer issues. It reinforces the KCS principle that knowledge is created and improved as part of the support workflow rather than as an exceptional, separate task.

Create a dashboard that includes articles submitted by agents and approved for publication. A dashboard provides managers and agents with transparent operational visibility into contribution volume and the progression of submitted knowledge through the review process. Tracking both submitted and approved articles helps management monitor adoption, identify coaching opportunities, and recognize consistent contributors while maintaining a feedback loop around the health of the knowledge base. Salesforce Knowledge supports reporting and dashboards for monitoring knowledge-article activity, and KCS emphasizes measuring knowledge work and learning as an ongoing service operation. See Salesforce’s [Knowledge overview] and the Consortium for Service Innovation’s [KCS resources].

QUESTION NO: 61

A company wants to publish Knowledge articles to its Customer Community. The articles should be organized for easy navigation by Community members. What should a Consultant recommend?

A. Define Article Types with Public Sharing Settings.

B. Define Data Categories with Custom Visibility.

C. Define Topics for each Knowledge article.

D. Define a Custom Field to identify the Subject.

ANSWER: B

Explanation:

Define Data Categories with Custom Visibility is the appropriate recommendation because Salesforce Knowledge data categories provide a structured, hierarchical classification system for articles. A consultant can create category groups and category trees that reflect the company’s products, services, regions, or support subjects, then assign the applicable categories to each published article. Community members can use those categories to browse and narrow the Knowledge content, making self-service navigation more intuitive than relying on unstructured labels alone.

Data category visibility also lets the organization control which category groups and categories are available to external community users. This ensures that Customer Community members see a navigable Knowledge structure containing only content intended for their audience, while internal users or other audiences can have different visibility. Salesforce documents that data categories are used to organize Knowledge articles and that category group visibility can be configured for profiles and permission sets. For implementation details, see Salesforce Knowledge data categories and Configure data category visibility.

QUESTION NO: 62

In the telesales contact center, Universal Containers has three-step and five-step order process, contingent on the type of product solD. Which approach should be used to optimize the order process? Choose 2 answers

A. Use Visualforce to create a wizard for each process

B. Organize the fields on the page layout to match each process

C. Use Visual Workflow to streamline the process

D. Create a custom object for each step in the process

ANSWER: B C

Explanation:

Organize the fields on the page layout to match each process is appropriate because a purpose-built layout can present the information representatives need in the order in which they need it. Salesforce can use record types and assigned page layouts to tailor the user experience for different product categories, keeping the three-step and five-step processes clear and reducing unnecessary data entry. Layouts also provide a declarative way to make important fields prominent and group related information into logical sections for the relevant order process.

Use Visual Workflow to streamline the process is also appropriate. Visual Workflow, now delivered through Salesforce Flow, supports guided, screen-based business processes. A flow can gather information step by step, apply conditional branching based on the selected product or order type, validate entries, and create or update the required records. This enables a single guided experience that can follow either the shorter or longer path while ensuring consistent execution by contact-center representatives. Combining process-specific layouts with Flow provides an efficient, maintainable solution that uses Salesforce configuration before custom code. See Salesforce's Flow documentation and its guidance on record types and page layouts.

QUESTION NO: 63

Universal Containers is considering a Knowledge-Centered Support (KCS) implementation.

Which three benefits can be expected from KCS adoption? Choose 3 answers

A. Increased call deflection

B. Increased call routing accuracy

C. Reduced issue resolution time

D. Reduced support channels

E. Optimized use of resources

ANSWER: A C E

Explanation:

Knowledge-Centered Support is a methodology in which support teams create, improve, and reuse knowledge while resolving customer issues. "Increased call deflection" is an expected benefit because publishing relevant, searchable knowledge enables customers to solve more common questions through self-service rather than opening a support case. This can reduce assisted-support demand while improving the customer experience.

"Reduced issue resolution time" follows from agents having validated, findable answers available in the flow of work. Rather than researching the same issue repeatedly or escalating routine questions, agents can reuse knowledge and focus their effort on diagnosing exceptions and updating articles when new information is learned.

"Optimized use of resources" is also a core result of capturing organizational learning in a reusable knowledge base. KCS reduces duplicated investigation, makes expertise available beyond an individual subject-matter expert, and helps support teams apply their capacity to higher-value or more complex customer needs. Salesforce Knowledge supports both agent knowledge access and customer self-service experiences, which are key enablers for these outcomes. See Salesforce's Knowledge overview and the Consortium for Service Innovation's KCS resources.

QUESTION NO: 64

Universal containers contact center is experiencing increased call volumes due to a growing product portfolio.What is the recommended strategy to allow the contact center to handle the increased customer inquiries more efficiently? (choose 1 answer)

A. Hire contact center representatives that specialize in each of the product categories.

B. Make contact center representatives accessible 24/7 to distribute the call volume.

C. Redirect users from the company site to social media forums about the products.

D. Make knowledge base articles and community answers accessible on its website.

ANSWER: D

Explanation:

Make knowledge base articles and community answers accessible on its website is the recommended strategy because it enables customer self-service and reduces avoidable contact-center demand. As the product portfolio expands, customers need accurate, searchable help for a wider range of common questions, troubleshooting steps, and product usage scenarios. Publishing well-maintained Knowledge content on the company website lets customers find answers at any time before opening a case or placing a call. Community answers further extend this model by allowing customers to find discussions, accepted solutions, and peer guidance for recurring questions.

In Salesforce, Knowledge is designed to create, manage, and publish a centralized knowledge base that can be surfaced to customers through self-service channels. This approach improves deflection while ensuring that agents can use the same vetted information when an inquiry does require assisted support. Salesforce Experience Cloud can expose Knowledge and community content in a branded digital experience, helping customers resolve issues independently and allowing the contact center to focus on more complex, high-value cases. For details, see Salesforce Knowledge Overview and Experience Cloud Overview.

QUESTION NO: 65

Which two capabilities of Salesforce Knowledge ensure accurate content in Articles?

Choose 2 answers

A. Data Category to assign an Article Type to a Reviewer

B. Validation Rules for Article Types to verify all fields during creation

C. Knowledge Action to Publish an Article once the Article is approved

D. Approval Process that assigns an Article to a Reviewer Queue

ANSWER: B D

Explanation:

Validation Rules for Article Types to verify all fields during creation help maintain article quality by enforcing the business requirements an author must satisfy before an article can be saved. For example, a rule can require that required troubleshooting information, a product identifier, or a review date is supplied when an article meets specified conditions. This makes the article data more complete and consistent at the point it is authored or edited. Salesforce validation rules evaluate record data and prevent a save when the rule's criteria indicate invalid or incomplete information. See Salesforce Help: Validation Rules.

Approval Process that assigns an Article to a Reviewer Queue provides a governed content-review workflow. An approval process can route an article to designated reviewers before it is approved for publication, allowing subject-matter experts or content owners to validate technical correctness, policy compliance, and clarity. Assigning the approval work to a reviewer queue ensures that the review is handled by an appropriate available reviewer rather than relying on an individual author to self-certify the content. Salesforce approval processes support defined entry criteria, approval steps, assigned approvers, and final approval actions; see Salesforce Help: Approval Processes Overview.

QUESTION NO: 66

Cloud Kicks uses Einstein Next Best Action to help service agents when working on a

customer case. Multiple service agents work on the same case.

What should a consultant configure to show service agents when items were started, paused,

resumed, and completed?

A. Case History related list

B. Actions & Recommendations component

C. Activity analytics tab

ANSWER: B

Explanation:

The **Actions & Recommendations component** is the appropriate configuration because it provides the service-agent interface for Einstein Next Best Action recommendations and the actions taken from them. When agents collaborate on a case, the component's action status information gives subsequent agents visibility into the progress of work already initiated, including whether an item is in progress, paused, resumed, or completed. This shared status context helps prevent duplicate effort and lets an agent continue the customer's service process without having to reconstruct what prior agents did.

In Salesforce, Einstein Next Best Action uses strategies to evaluate context and present the most relevant recommendations to users. The Actions & Recommendations component is placed on the relevant Lightning record page, such as a Case record page, so that users can view and act on those recommendations in the context of the record they are servicing. Configuring it on the Case page therefore makes the action lifecycle visible where multiple agents need it. See Salesforce's Einstein Next Best Action overview and the Einstein Next Best Action Trailhead module.

QUESTION NO: 67

Universal Containers Call Center Agents have limited visibility to customer support levels, resulting in inconsistent response times and lengthened resolution times. Which two recommendations should a Consultant recommend to improve the agent experience and reduce response and resolution times? Choose 2 answers

A. Configure Assignment Rules based on Case Priority.

B. Add the Entitlements related list to the Account Page Layout.

C. Create a Report of all active Entitlements grouped by Customers.

D. Configure Success, Warning, and Violation Actions for Milestones.

ANSWER: B D

Explanation:

Adding the Entitlements related list to the Account Page Layout gives agents immediate access to a customer's active support agreements, including the level of service to which the customer is entitled. This puts support-level information in the agent's normal account workflow, helping the agent understand applicable coverage and service commitments before or while handling a case. Entitlements are designed to represent support terms for customers, and they can be associated with cases to apply the appropriate service process.

Configuring Success, Warning, and Violation Actions for Milestones operationalizes those service commitments. Milestones track required service events and time targets within an entitlement process, such as an initial response or case resolution. Warning actions can alert or escalate work before an SLA target is missed, violation actions can notify stakeholders when a target is breached, and success actions can record or communicate timely completion. These automated actions improve agent awareness, encourage timely case handling, and support more consistent response and resolution performance. See Salesforce's Entitlements overview and Milestones documentation.

QUESTION NO: 68

Universal Containers plans to migrate data into SFDC from a legacy system. Which step should be taken before performing the migration of the data (Choose 2)?

A. Normalize database

B. Perform data cleaning

C. Enable data validation rules

D. Develop data map

ANSWER: B D

Explanation:

"Perform data cleaning" is a required preparation activity because imported records should be accurate, complete, consistently formatted, and deduplicated before they enter Salesforce. Cleansing the legacy data reduces the risk of creating duplicate people or organizations, invalid values, unusable picklist data, and incomplete records that would undermine reporting, automation, and service processes after go-live. The migration team should establish data-quality rules, correct known errors, standardize formats such as addresses and phone numbers, and identify records that should not be brought forward.

"Develop data map" is also essential before loading data. A source-to-target data map documents where each legacy field belongs in Salesforce, including the target object and field, any required transformations, default values, relationships, ownership, and external identifiers used to connect records. This mapping provides the implementation team with a repeatable loading design and supports test migrations, reconciliation, and validation of the final results. Salesforce recommends preparing source data and mapping it to Salesforce fields before selecting and using an import tool. See Salesforce's data import preparation guidance and Trailhead data-import module.

QUESTION NO: 69

Universal Telco sells and supports a line of smart phones. The company offers support via phone,

email-to-case, web-to-case, and a customer portal. The call center manager is incented to drive support through customer self-service. Which report should be included on the manager's dashboard? Choose 3 answers

A. Number of Portal Logins per Day

B. Knowledge Article Usage

C. Average Call Handle Time

D. Cases by Support Channels

E. Escalated Calls

ANSWER: A B D

Explanation:

The dashboard should measure both adoption of the self-service destination and whether customers are successfully finding help there instead of opening assisted-support cases. **Number of Portal Logins per Day** measures customer engagement with the portal and provides a direct trend for adoption of the self-service channel. A rising login volume is a useful leading indicator that customers are using the digital support experience.

Knowledge Article Usage measures whether customers are consuming the help content intended to resolve common questions independently. Knowledge usage data can identify highly valuable articles, content gaps, and opportunities to improve search, article visibility, and self-service resolution. Salesforce Knowledge reporting supports tracking article activity and effectiveness.

Cases by Support Channels is essential for evaluating the desired behavioral shift across phone, email-to-case, web-to-case, and portal-based support. The manager can monitor whether lower-effort digital channels are handling a greater share of demand and use the trend to assess self-service initiatives. Salesforce reporting dashboards can combine these operational metrics into a single view for ongoing management. See Salesforce Help: Knowledge Reports and Salesforce Help: Reports and Dashboards.