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# Salesforce Certified Field Service Consultant

## Salesforce Field-Service-Consultant

**Version Demo**

**Total Demo Questions: 28**

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# Topic Break Down

| Topic | No. of Questions |
|---|---|
| Topic 1, Designing a Field Service Solution | 11 |
| Topic 2, Managing Resources | 40 |
| Topic 3, Managing Work Orders | 79 |
| Topic 4, Managing Scheduling and Optimization | 92 |
| Topic 5, Managing Mobility | 35 |
| Topic 6, Managing Inventory | 23 |
| Total | 280 |

QUESTION NO: 1

Universal Containers operates in a highly regulated industry. Technicians must conduct quarterly inspections for all customers in their region. Each inspection

should be completed within a single visit and include all installed assets on site.

Which two Maintenance Plan settings should the

Consultant recommend? Choose ? answers

**A.** Service Appointment Generation Method = One Service Appointment per Work Order

**B.** Work Order Generation Method = One Work Order per Asset

**C.** Work Order Generation Method = One Work Order Line Item per Asset

**D.** Service Appointment Generation Method = One Service Appointment per Work Order Line Item

**ANSWER: A C**

**Explanation:**

The appropriate configuration is **Work Order Generation Method = One Work Order Line Item per Asset** together with **Service Appointment Generation Method = One Service Appointment per Work Order**. A maintenance plan can identify the assets that require recurring service, and generating a work order line item for each asset keeps the inspection requirements for every installed asset distinct and traceable. This is especially valuable in a regulated environment because the resulting work order retains an itemized record of the assets included in the quarterly inspection.

Generating one service appointment for the work order then groups those line items into a single scheduled field visit. The assigned technician can complete the inspection of all applicable on-site assets during that one appointment while recording work and completion details against the individual line items. This supports the stated operational requirement: all installed assets are included, but no separate visits are created merely because multiple assets exist at the customer location. Salesforce maintenance plans use work orders, work order line items, and service appointments to model recurring maintenance and its scheduling requirements. See Salesforce's Maintenance Plans documentation and the Trailhead maintenance-plan unit.

**QUESTION NO: 2**

universal containers want to limit their technicians view of work orders and appointment in the field service lightning mobile app. What should a consultant recommend to control their technicians?

**A.** mini page layouts

**B.** page layouts

**C.** field sets

**D.** visual force page

**ANSWER: B**

**Explanation:**

**page layouts** are the appropriate configuration for controlling which fields technicians can see when they open Work Orders and Service Appointments in the Salesforce Field Service mobile app. A consultant can create tailored page layouts for these objects, include only the operational information required in the field, and assign the layouts by profile or record type as needed. This makes the record-detail experience more focused for technicians, helping them quickly access essential appointment, work, customer, and asset information without exposing unnecessary fields.

Page layouts are also the standard Salesforce declarative mechanism for organizing record fields and related lists into logical sections. Field-level security should be configured alongside the layouts when the organization needs to prevent access to sensitive data rather than merely simplify the interface. In Field Service, this combination supports a streamlined

mobile workflow while preserving the organization's existing Salesforce security model. Salesforce documents that page layouts control the fields, buttons, and related lists users see for a record, while Field Service mobile configuration uses the underlying Salesforce record experience for supported objects. See Salesforce page layout overview and Salesforce Field Service mobile app documentation.

## QUESTION NO: 3

Universal Containers (UC) normally focuses on minimizing travel. Weather can cause situations that require expedited on-site service.

How should a Consultant recommend UC handle unplanned service during times of severe weather?

**A.** Postpone all lower-priority jobs and extend Due Dates.

**B.** Configure an Emergency Policy and use the Emergency Wizard.

**C.** Manually flag Service Appointments as "In Jeopardy" due to weather.

**D.** Configure a new Service Level for immediate assignment.

## ANSWER: B

**Explanation:**

Configure an Emergency Policy and use the Emergency Wizard. Salesforce Field Service emergency management is designed for exactly this operational scenario: a sudden event creates urgent work that must be scheduled quickly while the organization still needs to manage the effect on existing appointments. An Emergency Policy defines how the scheduling and optimization process should treat emergency work, including the objectives and constraints that apply when responding to the event. The Emergency Wizard then guides dispatchers through creating and managing the emergency response, identifying affected service appointments, and applying the policy to produce an actionable plan. This gives UC a repeatable, controlled process for expediting weather-related service rather than relying on ad hoc dispatcher actions. It can prioritize urgent customer needs, account for technician availability and travel implications, and adjust the schedule in a way that is consistent with the organization's emergency-service rules. This capability is particularly valuable when severe weather disrupts normal operations because it supports rapid replanning at scale while preserving visibility into the resulting schedule. See Salesforce's Emergency Wizard documentation and the Salesforce Field Service Trailhead module for Field Service scheduling concepts.

## QUESTION NO: 4

Universal Containers wants Technicians using the Salesforce Field Service mobile app to indicate when Service Appointments are at risk of late completion.

What should a Consultant recommend to meet this requirement?

**A.** Post to the Service Appointment Chatter feed.

**B.** Change the Status field on the Service Appointment.

**C.** Adjust the Scheduled End field on the Service Appointment.

**D.** Update the In Jeopardy field on the Service Appointment.

## ANSWER: D

**Explanation:**

Updating the **In Jeopardy** field on the Service Appointment is the appropriate recommendation because it is the standard Field Service indicator specifically intended to flag an appointment as being at risk. A technician can set this checkbox from the Field Service mobile app when circumstances encountered in the field—such as unexpected work complexity, missing parts, or an extended prior job—make timely completion unlikely. This gives dispatchers and other operations users a clear,

structured signal that the appointment needs attention, without requiring them to interpret free-form messages or infer risk from scheduling dates.

Because it is a field on the Service Appointment record, the value can also be displayed in relevant page layouts and used in reporting, list views, flows, and operational monitoring. To support the mobile workflow, the consultant should ensure that the field is included on the appropriate Service Appointment mobile page layout and is editable for the technician's profile or permission set. Salesforce documents `InJeopardy` as a standard field on the Service Appointment object: ServiceAppointment Object Reference. Additional Field Service mobile configuration guidance is available in the Salesforce Field Service Mobile documentation.

## QUESTION NO: 5

Universal Containers is implementing Work Order Management to better support its clients.

Which two approaches should the Consultant consider to create work skills for the Service Resources?

Choose ? answers

**A.** Create the work skills using the FSL Lightning Web Component. Assign the skills to Service Resources. Add the skill to Work Types and Work Orders.

**B.** Create the work skills using the Guided Setup wizard. Assign the skills to Service Resources using Guided Setup.

**C.** Create the work skills using the FSL Lightning Managed Package wizard. Assign the skills to Service Resources. Add the skill to Work Types and Work Orders.

**D.** Create the work skills using Setup. Manually assign the skills to Service Resources.

## ANSWER: B D

**Explanation:**

Work skills represent the capabilities or qualifications that a field-service worker needs in order to perform particular work, such as electrical certification, equipment expertise, or language proficiency. A consultant can use the Field Service Guided Setup flow to create skills and associate them with service resources as part of a guided initial implementation. This is useful when configuring the core Field Service data model through the setup experience.

A consultant can also create skills directly in Salesforce Setup and manually associate the resulting skills with service resources. This approach supports more granular ongoing administration, such as adding a new qualification after deployment or maintaining skill assignments as a technician's certifications change. Once skills are established and assigned to the appropriate resources, they can be used with work requirements so scheduling and optimization consider whether a resource is qualified for the work. Salesforce describes skills as a key part of matching service appointments to appropriately qualified service resources. See Create Skills in Salesforce Field Service and Service Resources in Salesforce Field Service.

## QUESTION NO: 6

Which three factors should a Consultant consider when configuring routing? Choose 3 answers

**A.** Configure Schedule Policy by modifying Work Rules and Service Objectives.

**B.** Configure the Resource Availability work rule to calculate travel time and breaks as part of a resource's availability.

**C.** Default Travel Speed is used only if a different travel speed is not specified on the resource.

**D.** A straight line is used to compute the shortest distance between two locations if Street LevelRouting is enabled.

**E.** Set Auto Schedule to True upon creation of the Service Appointment.

## ANSWER: A B C

**Explanation:**

Routing configuration in Salesforce Field Service should align scheduling decisions with both organizational priorities and the real-world availability of field resources. **Configure Schedule Policy by modifying Work Rules and Service Objectives.** is correct because a scheduling policy brings together work rules, which define constraints and preferences such as skills, operating hours, or territory alignment, and service objectives, which determine how those rules are prioritized during scheduling and optimization.

**Configure the Resource Availability Work Rule to calculate travel time and breaks as part of a resource's availability.** is also a key routing consideration. Resource availability must account for time that cannot be assigned to work, including breaks and travel required to reach appointments. This helps the scheduling engine propose appointment times that are feasible for the assigned resource.

**Default Travel Speed is used only if a different travel speed is not specified on the resource.** is correct because travel-time estimates are central to routing. Salesforce uses the configured default travel speed as a fallback when an individual resource does not have a specific travel-speed value, enabling the scheduler to estimate travel duration consistently. See Salesforce's Scheduling Policies documentation and the Field Service scheduling Trailhead module.

## QUESTION NO: 7

Optimization for the Midwest territory is set to automatically run each night for the next three days. The Dispatcher has noticed that the optimizer is leaving many

Service Appointments unscheduled and has asked the Consultant to troubleshoot the issue. The Consultant notices that the Optimization Run Time per Service

Appointment is set to Low in the Field Service Settings.

Which two conditions would make the Consultant consider setting the optimizer to High? Choose 2? answers

**A.** Most service appointments have the same priority.

**B.** The Scheduling Policy Used field is blank.

**C.** The scheduling policy is producing too many candidates that qualify for each Service Appointment.

**D.** The Calculate travel and breaks Field Service Setting is disabledfor the Service Resource Availability work rule.

## ANSWER: A C

**Explanation:**

**Most service appointments have the same priority.** is a reason to increase Optimization Run Time per Service Appointment. Appointment priority helps the optimizer decide which work should be favored when it cannot schedule everything. When a large share of appointments has an identical priority, the optimizer has fewer meaningful priority distinctions to guide its choices. It may need additional processing time to explore more combinations of appointment ordering, resource assignments, and feasible time slots before selecting the best overall schedule.

**The scheduling policy is producing too many candidates that qualify for each Service Appointment.** also justifies using High. Candidates are the potential service-resource and time-slot combinations that satisfy the scheduling policy. A large candidate set increases the number of possible assignments the optimization engine must assess across the territory. Raising the per-appointment runtime gives the optimizer more time to compare these alternatives and construct a higher-quality schedule, which can reduce unscheduled appointments when the schedule is computationally complex. Salesforce documents optimization configuration and scheduling-policy behavior in its Field Service Optimization overview and the Field Service Developer Guide.

## QUESTION NO: 8

in which two scenarios should a consultant recommend multi day service appointment? Choose 2 answers

**A.** Jobs can take longer than the available resources hours in a day.

**B.** jobs need to be performed at the same site on the same day of the week.

**C.** jobs require multiple stages of work performed by different resources.

**D.** jobs require consecutive days of work and can span over weekends.

**ANSWER: A D**

**Explanation:**

Multi-day service appointments are appropriate when the work duration cannot fit within a resource's available working hours on a single day. For example, an installation, repair, or maintenance activity may require more hours than a technician can work during one operating day. A multi-day appointment lets Salesforce Field Service schedule the work as a continuous appointment across the required number of days while accounting for the resource's availability and operating hours.

They are also appropriate when the job must be performed on consecutive days and may continue across a weekend. Multi-day appointment scheduling is designed for work that needs an uninterrupted span of calendar days rather than separate, unrelated visits. The appointment can retain its multi-day duration while the scheduling engine evaluates applicable operating hours, resource availability, and any nonworking time within that span. Salesforce describes multi-day appointments and their scheduling behavior in its Field Service multi-day appointments documentation. For related scheduling concepts and configuration guidance, see the Salesforce Field Service scheduling Trailhead module.

**QUESTION NO: 9**

Universal Containers wants to make it easier for Managers to monitor Preventative Maintenance work orders using the Dispatcher Console.

Which two filtering options should managers use to find the appropriate work orders?

Choose ? answers

A, The Preventative Maintenance Gantt and filter the list to show only desired work orders

B. The Dispatcher Console Map and filter the list to show only desired service appointments

C. The Dispatcher Console Appointment list and filter the list to show only desired service appointments

D. The Dispatcher Work Order Polygon and filter the list to show only desired service appointments

**Answer: B, C**

**Explanation:**

**A.** The Dispatcher Console Map and filter the list to show only desired service appointments

**B.** The Dispatcher Console Appointment list and filter the list to show only desired service appointments

**C.** The Dispatcher Work Order Polygon and filter the list to show only desired service appointments

**ANSWER: A B**

**Explanation:**

The Dispatcher Console Map and filter the list to show only desired service appointments is correct because the map is a core Dispatcher Console component for viewing service appointments geographically. Dispatchers and managers can apply filters to narrow the appointments displayed, allowing them to focus the map on appointments generated for the relevant preventative-maintenance work.

The Dispatcher Console Appointment list and filter the list to show only desired service appointments is also correct because the appointment list is the console's primary tabular view of service appointments. Filters can be used to limit the displayed records based on relevant appointment and related-record criteria, making it practical to monitor the appointments associated with preventative-maintenance work orders. In Field Service, scheduling and dispatching activity is performed

against service appointments, which are the records shown on the console's schedule, list, and map. Therefore, filtering service appointments in either the map-oriented or list-oriented console view gives managers an appropriate operational view of preventative-maintenance work requiring attention.

For further detail on Dispatcher Console capabilities and working with appointments, see Salesforce Trailhead's Field Service Dispatcher Console module and the Salesforce Help topic on the Dispatcher Console.

## QUESTION NO: 10

Service appointments in a "cannot complete" status mayindicate that an

additional part or expert assistance is needed to complete the work. Universal

containers defined that service appointments in a "cannot complete" status are unable

to be rescheduled or unscheduled for history tracking purposes.

Which twoitems should the consultant recommend to meet the requirement?

Choose 2 answers

**A.** Define "cannot complete" as a pinned status for auto-dispatch services.

**B.** Define "cannot complete" as a pinned status for scheduling and optimization services.

**C.** Ensure that status transitions are configured to prevent the update from "cannotcomplete" to "none'.

**D.** Ensure that status transition are configured to allow the status update from "cannotcomplete" to "scheduled".

## ANSWER: B C

**Explanation:**

Define "cannot complete" as a pinned status for scheduling and optimization services because pinned statuses protect appointments that must remain fixed in the schedule. When an appointment reaches this outcome, Salesforce Field Service scheduling and optimization actions do not move it to another time or resource. This preserves the appointment's historical context while the organization determines whether an additional part, a follow-up visit, or expert assistance is required. Pinned statuses are specifically configured for the scheduling and optimization service, which is the relevant mechanism for preventing automated scheduling processes from changing the appointment.

Ensure that status transitions are configured to prevent the update from "cannotcomplete" to "none'" because unscheduling a service appointment changes its status to None. Configuring the status-transition rules so that Cannot Complete cannot transition to None prevents users or processes from unscheduling these historically significant appointments. Together, the pinned-status setting controls scheduling and optimization behavior, while the status-transition configuration enforces the business rule governing permitted status changes. Salesforce documents pinned statuses and the status-transition framework in its Field Service guidance: Pinned Statuses and Service Appointment Status Transitions.

## QUESTION NO: 11

Universal Containers sells widgets with multiple components. Based on a problem reported by a customer, one or more of the components need to be replaced.

What should a Consultant recommend to accurately record the required work?

**A.** Work Orders with Service Appointments

**B.** Work Orders with Work Order Line Items

**C.** Service Appointments and Service Appointment Line Items

**D.** Work Orders with Products Consumed

**ANSWER: B**

**Explanation:**

**Work Orders with Work Order Line Items** is the appropriate recommendation because the work order represents the overall service request for the customer's widget, while work order line items capture the individual tasks required to resolve that request. A reported problem can require replacement of one component or several distinct components, and each replacement can be recorded as a separate line item under the same parent work order. This creates a clear, structured record of the specific work to perform, including the relevant product, quantity, and details needed for fulfillment.

Work order line items also support operational planning in Field Service. They can be used to define the granular work that must be completed and can help ensure that the right parts, skills, and estimated effort are associated with the service request before dispatch. The resulting work order remains the central record for the customer issue, while its line items provide an accurate breakdown of each component-related replacement activity. Salesforce describes work orders as records for service work and work order line items as the individual tasks associated with that work. See Salesforce Trailhead: Work Orders and Salesforce Help: Work Order Line Items.

## QUESTION NO: 12

Universal Containers wants to prevent the lunch breakfrom interfering with existing scheduled work.

How should a Consultant configure the Scheduling Policy to ensure a 30-minute lunch break that begins every day after 1 PM?

**A.** Create a recurring Service Appointment.

**B.** Use the Resource Availability Rule.

**C.** Use appropriate Resource Operating Hours.

**D.** Create Resource Absences every day.

**ANSWER: B**

**Explanation:**

Use the Resource Availability Rule. In Field Service scheduling, this work rule evaluates whether a service resource has sufficient available time for an appointment while honoring availability constraints. A consultant can configure it to preserve a 30-minute break after 1 PM, allowing the scheduling and optimization engines to avoid placing work that would consume the required lunch period. This is particularly useful when the break must be considered dynamically alongside the resource's existing appointments, travel, and working hours rather than treated as a one-off manual scheduling decision.

The rule belongs in the Scheduling Policy because policies combine work rules and service objectives to govern how appointments are assigned and ordered. Once the policy containing the availability requirement is applied to scheduling or optimization, Field Service evaluates the lunch-break constraint as part of determining feasible appointment times. This supports consistent behavior across daily scheduling operations and helps dispatchers avoid inadvertently assigning work through the required break. Salesforce describes scheduling policies as the mechanism for applying work rules during appointment scheduling; resource availability is one of the core constraints used to determine whether an assignment is feasible. See Salesforce Help: Create Scheduling Policies and Trailhead: Schedule Field Service Work.

## QUESTION NO: 13

Universal Containers uses a private sharing model. Dispatchers need access to service work for a newly created service territory without granting access to records in every territory.

Which two actions should a Consultant recommend?

Choose 2 answers

**A.** Create a User Territory associated with the new Service Territory and dispatcher.

**B.** Configure and run the User Territory Sharing Job in Field Service Settings.

**C.** Make the dispatcher the owner of every Service Appointment in the territory.

**D.** Assign every Service Resource in the territory to the dispatcher's role.

**ANSWER: A B**

**Explanation:**

Create a User Territory that associates the dispatcher with the new Service Territory. A User Territory identifies the territory for which a user requires Field Service operational visibility. This supports territory-specific access for dispatchers while preserving private organization-wide defaults.

Configure and run the User Territory Sharing Job in Field Service Settings. The sharing job evaluates User Territory assignments and creates the appropriate sharing for the Field Service records associated with the territory. It should be run after creating or changing User Territory assignments so the dispatcher receives access to the relevant records.

See Salesforce documentation for User Territories in Field Service and the Field Service Data Model Trailhead unit.

## QUESTION NO: 14

Service resources at Universal Containers (UC) frequently work in more than one service territory.

The current scheduling policy looks only at primary territory. While UC still wants the optimizer to use

the service resource’s primary territory when scheduling, UC also wants the scheduling policy to look

at the resource''s secondary service territories.

Which two scheduling policy changes should a Consultant recommend?

Choose 2 answers

**A.** Select Working Location Enable Primary on theWorking Territories Work Rule:

**B.** Remove the Match Territory Work Rule.

**C.** Include the Match Territory Work Rule.

**D.** Deselect Working Location Enable Primary on the Working Territories Work Rule.

**ANSWER: A C**

**Explanation:**

UC should select *Working Location Enable Primary* on the *Working Territories* work rule and include the *Match Territory* work rule in the scheduling policy. Together, these settings let Salesforce Field Service evaluate a resource’s territory memberships for territory-based scheduling while retaining the primary-territory behavior UC wants. The Working Territories rule controls how the scheduling engine evaluates the territories in which a resource can work, and enabling the primary-location behavior preserves use of the resource’s designated primary territory in that evaluation. Resources can also belong to secondary service territories, which makes them eligible to be considered for work in those territories when the scheduling policy evaluates the appropriate territory rules.

The Match Territory work rule is the complementary rule that matches service appointments to qualified service resources based on service-territory membership. Including it ensures that the optimizer uses the territory assignments maintained for each resource, rather than limiting territory consideration to an unrelated scheduling criterion. This configuration is especially useful when dispatchers and the optimizer need to schedule a shared or mobile workforce across several territories without losing the organizational value of each resource’s primary territory. Salesforce documents these territory-focused scheduling rules in its Field Service scheduling-policy guidance: Working Territories work rule and Match Territory work rule.

## QUESTION NO: 15

Universal Containers has implemented a Flow that allows Technicians to replace faulty or damaged Assets directly fromwithin the Salesforce Field Service mobile app.

Once a replacement has been made, where can the Asset Relationships be viewed?

**A.** Only the Primary Assets related list on the Asset object

**B.** Only the Primary Assets related list on the Work Order object

**C.** Both the Primary Assets and Related Assets related lists on the Work Order object

**D.** Both the Primary Assets and Related Assets related lists on the Asset object

## ANSWER: D

**Explanation:**

Both the Primary Assets and Related Assets related lists on the Asset object is correct because Salesforce Field Service stores the association created during an asset replacement as an Asset Relationship. These relationship records represent the connection between a primary asset and its related asset, preserving visibility into the equipment relationship after the technician completes the replacement flow.

Salesforce exposes the relationship from both directions on Asset records. The **Related Assets** related list is used when viewing the asset designated as the primary asset, while the **Primary Assets** related list is used when viewing the associated related asset. Having both related lists available on the Asset page layout lets users inspect the full relationship regardless of which of the connected asset records they open. This is useful for service history, asset hierarchy review, and confirming which installed or replacement equipment is associated with another asset.

Administrators should ensure that both Asset Relationship related lists are included on the relevant Asset page layouts so dispatchers, technicians, and service managers can access this information as needed. Salesforce documents these lists and the primary-versus-related asset relationship model in its Field Service Asset Relationships documentation and Field Service asset management documentation.

## QUESTION NO: 16

Universal Containers occasionally needs to use two Technicians to complete a job, however the Technicians can be onsite at different times.

How should a Consultantimplement this process?

**A.** Create two Service Appointments and assign two different Resources.

**B.** Create one Service Appointment and add two Required Resources.

**C.** Create one Service Appointment and schedule two Resources.

**D.** Create two Service Appointments and set the Early Start to the Start Time of the first Service Appointment.

## ANSWER: A

**Explanation:**

**Create two Service Appointments and assign two different Resources.** is the appropriate design when the work requires two technicians but their visits do not need to occur concurrently. A service appointment represents a discrete unit of scheduled work, with its own duration, scheduling window, assigned service resource, and status progression. Creating one appointment for each technician lets dispatchers independently schedule each visit based on the technician's availability, territory, skills, travel time, and capacity. Each appointment can therefore have its own planned arrival and completion time while remaining associated with the same underlying work, such as through the same parent work order or related work order line items. This model also provides clear visibility into which technician is responsible for each portion of the work and supports accurate appointment-level tracking in the Field Service managed package. Salesforce describes

service appointments as the records used to capture the scheduling details for field-service work and assign that work to service resources. See Salesforce Help: Service Appointments and Trailhead: Field Service Service Appointments.

## QUESTION NO: 17

Universal Containers wants to stock commonly used replacement parts in technician vans. The inventory manager needs to track the quantity of each part available in every van.

Which two configurations should a Consultant recommend?

Choose 2 answers

**A.** Create a Mobile Location for each technician van.

**B.** Create Product Item records for the replacement parts at each Mobile Location.

**C.** Create a separate Price Book for each technician van.

**D.** Create an Asset record for each quantity of nonserialized inventory.

## ANSWER: A B

**Explanation:**

Create a Mobile Location for each technician van. A mobile location represents a vehicle or other inventory location that moves with a field resource. It allows Field Service to distinguish van stock from stock held at warehouses, depots, or customer locations.

Create Product Item records for the replacement parts at each Mobile Location. Product Items represent the inventory quantity of a product at a specific location. By creating Product Items for the van locations, the organization can track the available stock for each technician and update that quantity through product consumption and inventory-transfer processes.

See Salesforce Trailhead on Field Service Inventory Management and the Field Service core data model.

## QUESTION NO: 18

A technician at Universal Containers needs to transfer a replacement part from a warehouse inventory location to the technician's van before a scheduled repair.

Which Field Service record should be used to manage this inventory movement?

**A.** Product Transfer

**B.** Product Consumed

**C.** Required Product

**D.** Product Request Line Item

## ANSWER: A

**Explanation:**

A **Product Transfer** record is used to track inventory movement between inventory locations. In this scenario, the warehouse is the source location and the technician's van, modeled as a mobile inventory location, is the destination location.

The transfer records the product and quantity being moved and supports updating inventory quantities as the transfer progresses through its lifecycle. A Product Request identifies a need for inventory, but the Product Transfer represents the movement of stock between locations. See the Salesforce ProductTransfer object reference.

## QUESTION NO: 19

Universal Containers wants to ensure that inventory needed for repair jobs is tracked and managed so Technicians have the material for their jobs.

Which two ways should a Consultant recommend tracking these inventory requirements in Salesforce? (Choose two.)

**A.** Products Required for Work Orders

**B.** Products Required for Service Appointments

**C.** Products Required for Work Order Line Items

**D.** Products Required for Service Resources

## ANSWER: A C

**Explanation:**

**Products Required for Work Orders** and **Products Required for Work Order Line Items** are the appropriate ways to record material demand in Salesforce Field Service. A Product Required record identifies a product, the quantity needed, and related inventory information for work that must be performed. When it is associated with a work order, it represents material needed for the overall job. This is useful when the required parts apply to the repair or visit as a whole.

When a work order contains distinct tasks represented by work order line items, Product Required records can instead be associated with the individual work order line item. This enables more granular planning: each task can have its own required parts and quantities, while all requirements remain tied to the parent service work. Field Service can then use these requirements to support inventory visibility, reservation and consumption processes, and technician readiness before the appointment.

This model lets an organization capture requirements at the level that best matches how it plans repair work, without forcing every material requirement onto a single job-level record. See Salesforce's Product Required documentation and the Field Service Product Required developer guide.

## QUESTION NO: 20

To prepare for an upgrade, a mobile technician creates a product request for three circuit boards to be sent from the main warehouse to the customer site. The completed job needs two of the boards. Which two Field Service tools should the technician use to

return the unused circuit board to the warehouse?

Choose ? answers

A, Work Order

B. Return Order

c. Product Transfer

D. Product Receipt

## Answer: B, D

**Explanation:**

**A.** Work Order

**B.** Return Order

## ANSWER: B

**Explanation:**

The appropriate tools are **Return Order** and **Product Receipt**. A return order records the intention to send inventory back from the customer site to the warehouse and provides the inventory transaction framework for the return. In this situation, the extra circuit board is no longer required to complete the work, so the technician or dispatcher should create a return order for the unused item and identify the warehouse as the destination location.

After the board physically arrives at the warehouse, a product receipt records that the warehouse has received it. This receipt updates the inventory process so the returned circuit board is recognized as available stock at the warehouse. The two records therefore support the distinct operational stages of a return: authorizing and tracking the outbound return, then confirming its arrival and restoring inventory at the destination.

Salesforce Field Service inventory processes use product requests and related inventory records to track parts as they move between locations and technicians. Review the Field Service inventory-management learning material at Salesforce Trailhead: Field Service Inventory Management and the product-request process overview at Salesforce Trailhead: Manage Product Requests.

## QUESTION NO: 21

Universal Containers wants their Technicians to create an additional visit to complete unfinished work within the Salesforce Field Service mobile application.

Which approach should a Consultant recommend to meet the requirement?

**A.** Define a Visualforce page that creates a newService Appointment record.

**B.** Define a Quick Action that creates a new Work Order record.

**C.** Define a Quick Action that creates a new Service Appointment record.

**D.** Define a Visualforce page that creates a new Work Order record.

## ANSWER: B

**Explanation:**

Define a Quick Action that creates a new Work Order record. A work order is the primary Field Service record used to represent work that must be completed for a customer. When a technician determines that the current visit cannot be completed, creating a new work order from the mobile app provides a supported, user-friendly way to capture the remaining work while the technician is in the field. The new work order can include the appropriate account, location, work type, priority, and description of the unfinished tasks. Field Service can then create and schedule the associated service appointment, allowing dispatchers to assign the follow-up visit through standard scheduling and optimization processes.

Quick actions are designed for streamlined record creation and can be exposed in the Field Service mobile app through the configured mobile navigation and action layout. This lets technicians initiate the follow-up workflow without requiring custom Visualforce development. Using a work order also preserves the appropriate Field Service data model and supports downstream processes such as service appointment scheduling, resource assignment, status tracking, and reporting. See Salesforce's Field Service work order overview and Quick Action documentation.

## QUESTION NO: 22

AW Computing groups its technicians based on seniority. The newest techs comprise Tier 1, move to Tier 2 after a year on the job, and get assigned to Tier 3 after 3 years on the job. Resources with more seniority should be considered for a job over resources with less seniority.

How should the field service administrator ensure this corporate policy is enforced considering the Customer First scheduling policy is utilized consistently except in emergency situations?

**A.** Create a custom number field to capture the tier number on the service resource.

**B.** Create a queue for each tier group within each territory on the Service Appointment object.

**C.** Use the Priority field on the service resource assigning Tier 3 techs the lowest number and Tier1 techs with the highest number.

**D.** Make a relevance group on the work rule to filter based on the tier number and add the rule to the policy.

**ANSWER: D**

**Explanation:**

Make a relevance group on the work rule to filter based on the tier number and add the rule to the policy. Relevance groups let Field Service evaluate resource-record field values when determining which resources are relevant candidates for scheduling. The administrator can use the custom tier value on each service resource to express the company's seniority hierarchy, so that Tier 3 technicians are given preference ahead of Tier 2 and Tier 1 technicians when otherwise suitable for the appointment. Adding the work rule to the regularly used Customer First scheduling policy makes this preference part of the policy's normal candidate-selection behavior, rather than requiring dispatchers to apply a manual decision for every appointment. This approach also fits a policy-driven scheduling design: the same configured policy can be applied consistently by the scheduling engine while a different policy can be selected when an emergency requires an exception. Relevance groups are specifically intended to refine resource relevance using resource attributes, making them appropriate for implementing an organizational preference such as technician seniority. See Salesforce's Relevance Groups documentation and the Field Service Scheduling and Optimization Trailhead module.

**QUESTION NO: 23**

Universal Containers performs service on field assets that require a sequence of work tasks. A Consultant has recommended Work Order Line Items to manage the tasks and assets/parts necessary to manage the work. Which two of the following must be considered as part of this solution to ensure Work Orders are properly completed? Choose 2 answers

**A.** Use of Standard Reports to view Parent and Root Work Order Lines Items within Work Orders by Customer.

**B.** Use of Work Order Line Items that automatically inherit the hierarchy of Assets attached to Work Order.

**C.** Use of Work Order Line Items to link to a specific Asset within the Asset Hierarchy that represents the BoM.

**D.** Use of a parent-child Work Order Line Item to create a Work Order Line Item hierarchy.

**ANSWER: C D**

**Explanation:**

Use of Work Order Line Items to link to a specific Asset within the Asset Hierarchy that represents the BoM is correct because each work task can be associated with the actual asset being serviced. This provides the technician and dispatcher with the necessary equipment context, including the relevant component within a broader bill-of-materials structure. The WorkOrderLineItem object includes an Asset relationship, allowing task-level work to be recorded against the appropriate asset rather than only against the overall work order. Salesforce documents this relationship in the WorkOrderLineItem object reference.

Use of a parent-child Work Order Line Item to create a Work Order Line Item hierarchy is also correct. A parent Work Order Line Item can organize subordinate line items into a structured set of related tasks. This supports complex service work in which completion depends on managing multiple component-level activities in an orderly hierarchy. The hierarchy gives the work order a meaningful task structure while retaining each task as an individually trackable line item with its own status and asset association. Salesforce Field Service uses work orders and work order line items to model and manage service work; see the Salesforce Field Service work orders overview.

**QUESTION NO: 24**

Customer relationships and reliable service are the main focus this year at Ursa Major Solar. Management has

asked that once a technician has serviced a customer, they continue to service that customer when possible.

What should the consultant recommend to meet this requirement?

**A.** Designate a Skill-based resource to the Work Order.

**B.** Assign a Preferred status Resource Preference to the Account.

**C.** Configure an account preference on the Service Resource record.

**D.** Include the Required Resource work type in Scheduling Policies.

## ANSWER: B

**Explanation:**

Assign a Preferred status Resource Preference to the Account. In Salesforce Field Service, a resource preference associates a service resource with an account and indicates that the resource should be favored when work is scheduled for that customer. This is appropriate when continuity is desired but is not an absolute requirement: the scheduling engine can select another qualified and available resource when the preferred technician cannot reasonably perform the appointment. That behavior directly supports the stated goal of having the same technician return whenever possible, helping the technician retain customer context and build an ongoing relationship without preventing service from being delivered on time.

The preference is created for the customer account and the relevant service resource, then its preference type is set to Preferred. Scheduling and optimization can consider this relationship while still evaluating the normal operational factors, such as operating hours, travel, required skills, service territories, and availability. Salesforce distinguishes this from a required preference, which should be reserved for cases where a particular resource must perform the work. See Salesforce Trailhead's discussion of resource preferences in Field Service and the Salesforce Help documentation on resource preferences.

## QUESTION NO: 25

When completing a Work Order in the field, the Technician needs to capture two signatures to ensure compliance.

Which steps are needed to configure the signature capture?

**A.** Create a Flow that adds two Signature Blocks when the Service Report is generated,

**B.** Create relevant Signature Types and add Signature Blocks to the Service Report Template.

**C.** Create two custom fields for the Service Appointment and use Flows to capture each signature.

**D.** Create two Service Reports and add one Signature Block to each Report.

## ANSWER: B

**Explanation:**

Create relevant Signature Types and add Signature Blocks to the Service Report Template. This is the standard Field Service configuration for collecting more than one signature as part of a single service report. A Signature Type defines the business purpose and label of the signature that must be collected, such as customer acceptance, technician confirmation, site contact approval, or safety acknowledgement. The administrator creates the needed signature types and then places a separate Signature Block for each one on the applicable service report template.

When the mobile worker generates or completes the service report, each configured Signature Block is presented as an independent signature area. The captured signatures are therefore associated with their designated signature types and included in the generated report, providing a clear compliance record of who signed for each required acknowledgement. This approach supports the requirement without creating duplicate work orders or reports and keeps the signature experience consistent with Salesforce Field Service's native service-report process. Configure the template used by the relevant work order or service appointment so that both required signature blocks are available to the technician in the field. See Salesforce's documentation on Signature Types and Service Report Templates.

## QUESTION NO: 26

Time sheet entries can be associated to which two objects? Choose 2 answer

**A.** Work order line item

**B.** assigned resources

**C.** Service resource

**D.** Work order

**ANSWER: A D**

**Explanation:**

Time sheet entries can be associated with a work order and with a work order line item. This supports recording the actual labor time spent at the appropriate level of detail in Field Service. A work-order-level entry captures time spent on the overall customer job, such as travel, assessment, or work that is not attributable to one specific line item. A work-order-line-item-level entry records time against a particular task, product, or service defined within the parent work order. This distinction is useful for labor tracking, operational reporting, and evaluating the effort required for individual components of a job.

When technicians submit time, Field Service uses these relationships to preserve the operational context of the work performed. The resulting records can support downstream processes such as reviewing technician utilization, comparing planned and actual effort, and analyzing labor costs by work order or by the individual work items completed. Salesforce documents the Time Sheet Entry object and its relationships in the Time Sheet Entry object reference. For Field Service time-sheet concepts and setup context, see Salesforce's Time Sheets in Field Service documentation.

**QUESTION NO: 27**

Northern Trail Outfitters wants to improve overall responsiveness to customers.

Which Dispatch technique should the Consultant implement to provide the greatest schedule flexibility?

**A.** Enable Drip-feed to dispatch the next appointments.

**B.** Shuffle daily work manually via the Gantt.

**C.** Leverage Resource Schedule Optimization.

**D.** Configure the Auto Dispatch scheduled job.

**ANSWER: A**

**Explanation:**

Enable Drip-feed to dispatch the next appointments. Drip-feed dispatching provides the greatest schedule flexibility because it sends only a limited number of upcoming appointments to a technician at a time, rather than committing the technician's entire day to the mobile app immediately. As technicians complete work, encounter delays, or receive changes in the field, dispatchers retain the ability to adjust the unsent portion of the schedule and respond to new customer needs. This supports a more dynamic operation while still ensuring technicians have their next jobs available when needed.

For example, a dispatcher can configure drip-feed behavior so that technicians receive a small number of future appointments. If an urgent service request arrives or travel and appointment durations change during the day, remaining appointments can be reassigned, resequenced, or optimized before they are sent. This reduces the operational rigidity that results from dispatching a full day's work at once and helps the organization improve responsiveness without leaving technicians without work. Salesforce documents drip-feed dispatching as a Field Service capability for controlling when appointments are dispatched to mobile workers. See Salesforce Help: Drip-Feed Dispatching Overview and Salesforce Help: Enable Drip-Feed Dispatching.

**QUESTION NO: 28**

A consultant has implemented user territories at Northern Trail Outfitters (NTO) in a private sharing model. A new Midwest Service Territory has been created.

Which two actions should NTO take to give the dispatcher access to all relevant Midwest records? Choose 2 answers

**A.** Create a new user territory associated with the Service Territory and dispatcher.

**B.** Configure and run the User Territory Sharing Job in Field Service Settings.

**C.** Assign a new user territory and add each of the assigned service resources.

**D.** Add the resources assigned to the Service Territory's Member related list.

**ANSWER: A B**

**Explanation:**

In a private sharing model, Field Service user territories provide the mechanism for granting users access to records associated with a service territory. NTO should create a user territory associated with the Midwest Service Territory and the dispatcher. This establishes the dispatcher's relationship to that territory and identifies the territory whose operational records must be shared with that user.

NTO must then configure and run the User Territory Sharing Job in Field Service Settings. The job evaluates user-territory assignments and creates the required sharing for the dispatcher, allowing the dispatcher to work with the relevant Midwest Field Service records despite the organization's private baseline sharing. It is important to run the job after introducing or changing territory assignments so that the sharing model is synchronized with the new assignment. This approach supports controlled access based on operational territory responsibility while retaining the protections of private organization-wide defaults.

For additional implementation guidance, see Salesforce Trailhead's Field Service Data Model module and Salesforce's User Territories in Field Service documentation.