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QUESTIONS & ANSWERS

DEMO VERSION

(LIMITED CONTENT)

Question 1

Question Type: MultipleChoice

Technicians are tasked with performing product upgrades at customer sites. During the upgrade process, a new product is installed to replace the obsolete product. For reporting purposes, the information about the obsolete and upgraded products, as well as the customer for which the upgrade is done should be tracked in Salesforce.

Which object should an admin configure to support this process?

Options:

A- Child Asset
B- Asset Warranty
C- Asset Relationship
D- Maintenance Asset

Answer:

C

Explanation:

This question asks how to track the history/link between an old asset and a new one.

Option C is correct. The Asset Relationship object is a standard Salesforce object designed specifically to link two assets. It includes fields like Relationship Type (which can be set to 'Replacement,' 'Upgrade,' etc.) and From Date/To Date. This creates a clear lineage: Asset A was replaced by Asset B.

Option A (Child Asset) implies a hierarchy (one is part of the other), not a replacement.

Option D (Maintenance Asset) is used for Maintenance Plans (PMs), not for tracking swap/upgrade history.

Question 2

Question Type: MultipleChoice

A customer doesn't want contractors to be considered in optimization runs.

How can a consultant implement this requirement?

Options:

A- Create 'Count Rule' Work Rule and include it in the Scheduling Policy
B- Create 'Match Field' Work Rule and include it in the Scheduling Policy
C- Create 'Extended Match' Work Rule and include it in the Scheduling Policy
D- Create 'Match Boolean' Work Rule and include it in the Scheduling Policy

Answer:

D

Explanation:

To exclude a specific subset of resources from being scheduled by the optimization engine, you use a Hard Constraint Work Rule.

Option D is correct. The Match Boolean Work Rule is designed to filter resources based on a checkbox (Boolean) field.

You would create a custom checkbox on the Service Resource object (e.g., Is_Contractor__c).

You configure the Match Boolean rule in the Scheduling Policy to enforce that Is_Contractor__c must be False.

When optimization runs, any resource where Is_Contractor__c = True fails the rule and is completely ignored/excluded from the schedule calculation.

Option A (Count Rule) limits volume, it doesn't exclude.

Options B and C (Match Field/Extended Match) match properties between the Job and the Resource (e.g., Skill or Location matching), which is not the same as a blanket exclusion of a resource type.

Question 3

Question Type: MultipleChoice

Green Energy Solution is getting more work for the next 3 weeks. They are engaging a new third-party contractor to help with some work for that time.

What should the admin recommend?

Options:

A- Creating a Resource and giving it capacity for the next 3 weeks
B- Creating a Resource and deleting it after 3 weeks
C- Creating a Capacity Based Resource and giving it capacity for the next 3 weeks
D- Creating a Capacity Based Resource and deleting it after 3 weeks

Answer:

C

Explanation:

The key here is that it is a Third-Party Contractor and a Temporary engagement.

Option C is correct.

Capacity Based: Contractors are typically modeled as 'Capacity Based Resources' (buckets of work) rather than named individuals, as you usually don't track their specific travel or breaks---you just know they can take 'X hours of work per day.'

Giving Capacity: You would define the capacity only for the specific 3-week period. Once the capacity records end, the scheduling engine will naturally stop assigning work to them.

Options B and D (Deleting): It is never a best practice to delete a Service Resource record after use. You need the record to remain in the system to preserve the Audit Trail and historical data of the Work Orders they completed. You simply deactivate them or stop giving them capacity.

Question 4

Question Type: MultipleChoice

Universal Containers sells capital equipment that includes a 90-day warranty for repairs. They also offer a 'Preventative Maintenance Service Contract' for the purchase.

What data model and solution approach should a Field Service consultant recommend?

Options:

A- Establish a new customer on-boarding administration role and have that Service Resource manually create the 'Asset' records and create custom checkbox fields to determine if the 'Asset' is under 'Warranty' and signed up for the 'Preventative Maintenance Service Contract'
B- Create a custom object called 'Capital Equipment' and create these records from 'Opportunity Products' when an 'Opportunity' is 'Won'. That record will have a formula checkbox field if it is under

'Warranty'. Create a 'Maintenance Plan' record if the customer signs up for a 'Preventative Maintenance Service Contract'
C- Use 'Opportunity Products' that will create 'Assets' when the 'Opportunity' is 'Won' with automation. That automation can also create a 'Warranty' record for the 90 day period. If a 'Preventative Maintenance Service Contract' is purchased, have an automation to create a 'Service Contract' record, 'Maintenance Plan' record, and 'Maintenance Asset' records
D- Set the 'Warranty' and 'Maintenance Plan' as related lists on the 'Account' Record. Create an Automation that will trigger the creation of 'Preventive Maintenance Service Appointments' based on the related 'Maintenance Plan' if a 'Warranty' record is added as well

Answer:

C

Explanation:

This option follows the standard Salesforce Field Service data model and best practices for the 'Lead-to-Cash-to-Service' lifecycle.

Option C is correct.

Assets: Standard automation (or CPQ) converts Opportunity Line Items into Asset records.

Warranties: Standard Asset Warranty or Entitlement records track the 90-day coverage.

Maintenance: If a recurring service contract is sold, the correct objects are Service Contract (the agreement) and Maintenance Plan (the schedule/generation engine). The specific assets covered are linked via Maintenance Assets.

Option A is manual and error-prone.

Option B recommends a custom object ('Capital Equipment') when the standard Asset object exists specifically for this purpose.

Option D puts lists on the Account, losing the granularity of which specific asset is covered.

Question 5

Question Type: MultipleChoice

Which of the following objects have fieldsets that allow controlling how the data is displayed in the 'Dispatcher Console'? (Choose 3 options)

Options:

A- Resource Absence
B- Service Appointment
C- Service Resource
D- Service Territory
E- Assigned Resource

Answer:

A, B, C

Explanation:

The Dispatcher Console (Gantt) allows admins to customize which fields are visible in various panels and tooltips using standard Salesforce Field Sets.

A is correct (Resource Absence): You can control what information appears when a dispatcher hovers over a non-availability block (e.g., 'Sick Day,' 'Doctor's Appointment') by editing the field set on the Resource Absence object.

B is correct (Service Appointment): This is the most heavily customized object. You can configure field sets to control the columns in the Appointment List, the text shown on the Gantt bar, and the fields in the tooltip (hover).

C is correct (Service Resource): You can customize the resource list (left-hand side of the Gantt) to show fields like 'Vehicle Type,' 'Skill Level,' or 'Phone Number' by editing the field set on the Service Resource object.

Options D and E: Service Territory and Assigned Resource do not have direct field sets that control the Dispatcher Console layout in the same way the primary transactional objects do.

Question 6

Question Type: MultipleChoice

Universal Containers has a job that requires two technicians, and both must possess the skills defined as 'Required' for that job. They need to show up at the same time and work through the entire job duration together. The technicians will also need to be able to be assigned to individual jobs later that day.

Which option should an architect recommend to support this scenario?

Options:

A- One Work Order, one child Service Appointment and two Assigned Resources
B- One Work Order, two child Service Appointments with Appointment Dependency of 'Same Start' between them
C- One Work Order, one child Service Appointment with one Assigned Resource and a Work Order Line Item to store the second resource. Set Resource Absence on the second resource for the duration of the joint service
D- Service Crew Resource related to one Crew and two Crew Members assigned for the whole day

Answer:

B

Explanation:

This is a classic 'Double-Booking' vs. 'Complex Work' scenario.

Option B is correct. To book two distinct people for the same work at the same time, you create two Service Appointments. You link them using a Complex Work dependency of type Same Start4. This tells the optimization engine: 'Find a time where Resource A (Appointment 1) and Resource B (Appointment 2) are BOTH free, and book them simultaneously.'

Option A is incorrect because a single Service Appointment can typically only have one active Assigned Resource for scheduling purposes in the standard optimization model (unless using Crew Management, but Crews are for static teams, not ad-hoc pairs).

Option D is incorrect because the requirement states they need to be assigned to 'individual jobs later that day'5. Service Crews are designed for resources who stay together all day. Breaking a crew apart for half a day is administratively difficult.

Option C is a hack (Resource Absence) that blocks the second tech's time but doesn't link them to the actual job details properly.

Question 7

Question Type: MultipleChoice

What should a consultant recommend to help a customer with their initiative to reduce their carbon footprint?

Options:

A- Remove the 'ASAP' Service Objective.
B- Give 'Minimize Travel' Service Objective the highest weight.
C- Add the 'Maximum Travel from Home' Work Rule.
D- Remove the 'Match Location' Work Rule.

Answer:

B

Explanation:

Reducing a carbon footprint in field service is primarily achieved by reducing the fuel consumption and distance driven by the fleet.

Option B is correct. The Minimize Travel Service Objective calculates the travel distance/time for each potential appointment slot. By giving this objective the highest weight in the Scheduling Policy, the optimization engine will aggressively prioritize schedules that have the shortest routes, even if it means sacrificing other metrics (like 'ASAP' or 'Preferred Resource'). Shorter routes directly equate to less driving and lower emissions.

Option A (Remove ASAP) might help slightly by removing the urgency to book 'now' (which can cause inefficient routing), but it doesn't proactively optimize for low mileage like Option B does.

Option C (Maximum Travel Work Rule) is a hard limit (e.g., 'Don't travel more than 50 miles'). While it prevents extreme outliers, it doesn't optimize the routes within that radius.

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