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Question: 1

Universal Containers wants to ensure that Service Appointments are only assigned to Active Resources.

Which configuration should a Consultant recommend for the Scheduling Policy?

- A. Match Fields
- B. Preferred Resources
- C. Match Boolean
- D. Required Resources.

Answer: C

Explanation:

Match Boolean is an optimization criterion that prioritizes matching service appointments with resources based on boolean fields such as certifications or preferences[139]. Using Match Boolean in the Scheduling Policy would allow Universal Containers to ensure that Service Appointments are only assigned to Active Resources by creating a boolean field on the service resource object such as Active Resource and setting it to true or false depending on their status. Match Fields is an optimization criterion that prioritizes matching service appointments with resources based on fields such as skills or territories[140]. Preferred Resources is an optimization criterion that prioritizes assigning service appointments to resources who have previously completed similar work orders or who are preferred by customers[141]. Required Resources is an optimization criterion that prioritizes assigning service appointments to resources who are explicitly required by customers or dispatchers[142].

https://help.salesforce.com/s/articleView?id=sf.fs_scheduling_policies_optimization_criteria_match_boolean.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_scheduling_policies_optimization_criteria_match_fields.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_scheduling_policies_optimization_criteria_preferred_resources.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_scheduling_policies_optimization_criteria_required_resources.htm&type=5

Question: 2

Org-Wide Default sharing is set to Private in a Salesforce org.

If the Field Service Lightning User Territory feature is enabled, which three objects will be visible to users who are part of the User Territory?

Choose 3 answers

- A. Accounts
- B. Service Resources
- C. Work Orders
- D. Resource Absences
- E. Work Types

Answer: B C D

Explanation:

Service Resources are records that represent the people or equipment that perform field service tasks[143]. Work Orders are records that track customer requests for service such as repairs or maintenance[144]. Resource Absences are records that mark resources as unavailable for work for specific time periods due to sickness, vacation, or other reasons[145]. If the Field Service Lightning User Territory feature is enabled, these three objects will be visible to users who are part of the User Territory by default[146]. Accounts are records that represent companies or individuals involved in business with an organization[147]. Work Types are records that define the standard tasks and duration for a specific type of work[148]. These two objects will not be visible to users who are part of the User Territory by default unless sharing rules are configured[149].

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https://help.salesforce.com/s/articleView?id=sf.fs_work_orders.htm&type=5

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https://help.salesforce.com/s/articleView?id=sf.fs_user_territories_overview.htm&type=5

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https://help.salesforce.com/s/articleView?id=sf.fs_user_territories_sharing_rules.htm&type=5

Question: 3

Universal Containers outsources 100 hours of weekly maintenance to an external Contractor. Jobs are assigned to a Contractor Manager instead of individual external technicians. The Contractor Manager is in charge of updating Service Appointments and Work Orders upon completion.

How should a Consultant implement the requirement?

- A. Create the individual Technicians as Service Crew Members.
- B. Set the individual Technicians as Capacity-Based Service Resources.
- C. Set the Contractor Manager as a Capacity-Based Service Resource.
- D. Create the Contractor Manager as a Crew Service Resource.

Answer: C

Explanation:

Capacity-Based Service Resources are service resources that have a limited number of hours available for work per day or week[150]. Setting the Contractor Manager as a Capacity-Based Service Resource would allow Universal Containers to outsource 100 hours of weekly maintenance to an external Contractor by setting up criteria such as capacity hours per week equals 100 and capacity type equals weekly[151]. Creating the individual Technicians as Service Crew Members would not work because Service Crew Members are service resources that belong to a crew and share the same service appointments[152]. Setting the individual Technicians as Capacity-Based Service Resources would not work because Universal Containers does not have visibility into the individual external technicians. Creating the Contractor Manager as a Crew Service Resource would not work because Crew Service Resources are service resources that act as leaders or managers of a crew and can assign crew members to service appointments[153].

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https://help.salesforce.com/s/articleView?id=sf.fs_service_crews_create_edit_delete.htm&type=5

Question: 4

Which two features on the Dispatcher Console should the Consultant use to visualize Rule Violating Service Appointments? Choose 2 answers

- A. Color Palettes
- B. Gantt
- C. Gantt Map
- D. Appointment List

Answer: A D

Explanation:

Color Palettes are settings that allow dispatchers to customize the colors of service appointments on the Gantt based on different criteria such as status, priority, or rule violations[154]. Appointment List is a tool that allows dispatchers to view and filter service appointments in a list view based on different criteria such as status, priority, or rule violations[155]. Using these two features on the Dispatcher Console would allow visualizing Rule Violating Service Appointments by setting up color codes or filters based on rule violations. Gantt is a tool that allows dispatchers to view and manage service appointments on a timeline[156]. Gantt Map is a tool that allows dispatchers to view and manage service appointments on a map[157]. Using these two features on the Dispatcher Console would not allow visualizing Rule Violating Service Appointments by themselves unless combined with color palettes or appointment list.

https://help.salesforce.com/s/articleView?id=sf.fs_gantt_color_palettes_overview.htm&type=5

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https://help.salesforce.com/s/articleView?id=sf.fs_gantt_map_overview.htm&type=5

Question: 5

Universal Containers (UC) uses two contractors, Contractor 1 and Contractor 2, to perform repair work. Contractor 1 has provided services for UC for a longer period of time and is considered to have more repair work expertise than Contractor 2.

How should the Consultant configure the Contractors' experience?

- A. Assign Contractor 1 and 2 different Skill Levels for repair Work Type.
- B. Assign Contractor 1 as a Preferred Resource.
- C. Assign Contractor 1 and 2 different capacities for repair work.
- D. Assign Contractor 2 as an Excluded Resource.

Answer: A

Explanation:

Skills are records that define specific abilities or qualifications that service resources have[158]. Skill Levels are fields on the skill object that indicate the proficiency or experience of a service resource in a skill[159]. Assigning Contractor 1 and 2 different Skill Levels for repair Work Type would allow Universal Containers to configure the Contractors' experience by setting up criteria such as skill name equals repair and skill level equals high for Contractor 1 and low for Contractor 2. Assigning Contractor 1 as a Preferred Resource would not configure the Contractors' experience. Preferred Resources are optimization criteria that prioritize assigning service appointments to resources who have previously completed similar work orders or who are preferred by customers[160]. Assigning Contractor 1 and 2 different capacities for repair work would not configure the Contractors' experience. Capacities are fields on the service resource object that indicate the number of hours available for work per day or week[161]. Assigning Contractor 2 as an Excluded Resource would not configure the Contractors' experience. Excluded Resources are optimization criteria that prevent assigning service appointments to resources who are explicitly excluded by customers or dispatchers[162].

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[https://developer.salesforce.com/docs/atlas.en-](https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_skill_skilllevel.htm)

[us.api.meta/api/sforce_api_objects_skill_skilllevel.htm](https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_skill_skilllevel.htm)

https://help.salesforce.com/s/articleView?id=sf.fs_scheduling_policies_optimization_criteria_preferred_resources.htm&type=5 [https://developer.salesforce.com/docs/atlas.en-](https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_serviceresource_capacityhoursperday.htm)

[us.api.meta/api/sforce_api_objects_serviceresource_capacityhoursperday.htm](https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_serviceresource_capacityhoursperday.htm)

https://help.salesforce.com/s/articleView?id=sf.fs_scheduling_policies_optimization_criteria_excluded_resources.htm&type=5

Question: 6

Universal Containers plans to implement Crew Management to better support its clients. Which area does the Consultant need to consider as part of the recommendation?

- A. The Preferred Resource service objective is ignored for active Crew Members.
- B. Capacity-based scheduling is supported for Service Crews.
- C. A service resource can only be 2 member of 2 single Crew
- D. Salesforce Field Service considers the Recommended Crew Size when assigning appointments.

Answer: A

Explanation:

Crew Management is a feature that allows creating and managing crews of multiple service resources who share the same service appointments[163]. The Preferred Resource service objective is ignored for active Crew Members because it only applies to individual resources and not crews[164]. Capacity-based scheduling is not supported for Service Crews because crews do not have capacity limits and can be assigned unlimited service appointments[165]. A service resource can be a member of multiple crews and can switch between them depending on their availability and skills[166]. Salesforce Field Service does not consider the Recommended Crew Size when assigning appointments because it only considers the Required Crew Size which indicates the minimum number of crew members needed for a service appointment[167].
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https://help.salesforce.com/s/articleView?id=sf.fs_service_crews_create_edit_delete.htm&type=5
https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_serviceappointment_requiredcrewsizes.htm

Question: 7

Universal Containers (UC) wants to deploy Knowledge to its field team, How should UC ensure its Technicians can access Knowledge Articles offline?

- A. Use Work Types to assign associated Articles to Work Orders.
- B. Write a workflow that associates Articles to Work Orders based on a picklist on the Work Order.
- C. Use the Salesforce mobile app with deep linking to the Salesforce Field Service mobile app.
- D. Create a custom mobile app that syncs articles based on Service Appointment assignments

Answer: B

Explanation:

Articles are records that contain information or instructions about products, services, or processes[168]. Work Orders are records that track customer requests for service such as repairs or maintenance[169]. Writing a workflow that associates Articles to Work Orders based on a picklist on the Work Order would allow Universal Containers to ensure its Technicians can access Knowledge Articles offline by creating a workflow rule that triggers when a picklist value on the work order is selected and adds the relevant articles to the work order related list[170]. Using Work Types to assign associated Articles to Work Orders would not work because Work Types are records that define the standard tasks and duration for a specific type of work and do not have a direct relationship with articles[171]. Using the Salesforce mobile app with deep linking to the Salesforce Field Service mobile app would not work because deep linking is a feature that allows launching one app from another app and does not affect offline access[172]. Creating a custom mobile app that syncs articles based on Service Appointment assignments would not work because it would require additional development and maintenance and would not leverage the existing Salesforce Field Service mobile app features[173].

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https://help.salesforce.com/s/articleView?id=sf.fs_work_orders_knowledge_articles.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_work_types_overview.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_mobile_deep_linking.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_mobile_overview.htm&type=5

Question: 8

Universal Containers (UC) wants to track the Asset lifecycle when equipment has been swapped out.

What should a Consultant recommend to meet this requirement?

- A. Add the field history tracking related list to the Asset Page and configure the Product Request object,
- B. Add the Related Asset related list to the Asset Page and configure the Product Request object
- C. Add the Related Asset related list to the Asset Page and configure the Asset Relationship object.
- D. Add the field history tracking related list to the Asset Page and configure the Asset Relationship object.

Answer: B

Explanation:

Assets are records that represent products or equipment that customers have purchased or installed[174]. Related Assets are records that track the relationships between assets such as parent-child or swap[175]. Product Requests are records that track the products or parts that are requested, transferred, or returned for a service appointment[176]. Adding the Related Asset related list to the Asset Page and configuring the Product Request object would allow Universal Containers to track the Asset lifecycle when equipment has been swapped out by

creating related asset records for swapped assets and creating product request records for transferring or returning assets[177]. Adding the field history tracking related list to the Asset Page would not track the Asset lifecycle when equipment has been swapped out. Field history tracking is a feature that allows tracking changes to specific fields on an object over time[178]. Configuring the Asset Relationship object would not track the Asset lifecycle when equipment has been swapped out. Asset Relationship is an object that defines the types of relationships between assets such as parent-child or swap[179].

<https://help.salesforce.com/s/articleView?id=sf.asset.htm&type=5>

https://help.salesforce.com/s/articleView?id=sf.fs_related_assets_overview.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_product_requests_overview.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_related_assets_swap.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.field_history_tracking.htm&type=5

https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_assetrelationship.htm

Question: 9

Universal Containers wants Technicians to view work progress through the Work Order Line Item card in the Salesforce Field Service mobile app.

Which configuration steps should 8 Consultant take to meet this requirement?

- A. Create a custom Visualforce page and add an external link in the Salesforce Field Service mobile app to view the page in the mobile browser.
- B. Create a Report Chart that summarizes wk Order Line Items and add 2 link to the Service Appointment layout.
- C. Add the Work Order Line Items related list to the Work Order page layout and assign the layout to the Technician's profile.
- D. Create a custom Lightning Component that displays Work Order progress and deploy it to Technicians through the Salesforce Field Service mobile app.

Answer: D

Explanation:

Lightning Components are reusable units of user interface that can be customized and embedded in different pages or apps[180]. Work Order Line Items are records that track specific tasks or products related to a work order[181]. Creating a custom Lightning Component that displays Work Order progress and deploying it to Technicians through the Salesforce Field Service mobile app would allow Universal Containers' Technicians to view work progress through the Work Order Line Item card in the Salesforce Field Service mobile app by creating a component that shows the status or completion percentage of work order line items and adding it to the work order line item card layout in the mobile app settings[182]. Creating a custom Visualforce page and adding an external link in the Salesforce Field Service mobile app to view the page in the mobile browser would not allow Technicians to view work progress through the Work Order Line Item card in the Salesforce Field Service mobile app. Visualforce pages are web pages that can display custom user interface using HTML, CSS, JavaScript, and Apex[183].

Creating a Report Chart that summarizes Work Order Line Items and adding a link to the Service Appointment layout would not allow Technicians to view work progress through the Work Order Line Item card in the Salesforce Field Service mobile app. Report Charts are visual representations of report data that can be added to different pages or layouts[184]. Adding the Work Order Line Items related list to the Work Order page layout and assigning the layout to the Technician's profile would not allow Technicians to view work progress through the Work Order Line Item card in the Salesforce Field Service mobile app. Related lists are lists of records that are directly related to another record and can be added to different page layouts[185].

<https://developer.salesforce.com/docs/component-library/overview/components>

https://help.salesforce.com/s/articleView?id=sf.fs_work_order_line_items.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.fs_mobile_custom_cards_overview.htm&type=5

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[us.pages.meta/pages/pages_intro_what_is_it.htm](https://developer.salesforce.com/docs/atlas.en-us.pages.meta/pages/pages_intro_what_is_it.htm)

https://help.salesforce.com/s/articleView?id=sf.reports_charts_adding_to_layouts.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.customize_related_lists.htm&type=5

Question: 10

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 the Working 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:

Working Location Enable Primary is a setting on the Working Territories work rule that defines whether resources should be matched with service appointments based on their primary territory only or any territory they belong to[186]. Match Territory is a work rule that defines whether resources should be matched with service appointments based on their territories[187]. Selecting Working Location Enable Primary on the Working Territories Work Rule and including the Match Territory Work Rule would allow Universal Containers' scheduling policy to look at both primary and secondary service territories by enabling matching resources with service appointments based on any territory they belong to and prioritizing matching resources with service appointments based on their territories. Removing the Match Territory

Work Rule would not allow Universal Containers' scheduling policy to look at both primary and secondary service territories because it would disable matching resources with service appointments based on their territories. Deselecting Working Location Enable Primary on the Working Territories Work Rule would not affect Universal Containers' scheduling policy because it is already deselected by default.

https://help.salesforce.com/s/articleView?id=sf.fs_scheduling_policies_work_rules_working_territories.htm&type=5

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