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Salesforce - Implementing Field Service Lightning

Salesforce FSL-201

Version Demo

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Topic Break Down

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Topic 1, Planning and Discovery	12
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QUESTION NO: 1

Containers wants to offer their Field Technicians a more limited view of Work Orders and Service Appointments in the Field Service mobile app compared to their Dispatchers. What should a Consultant recommend so the Field Technician sees only the necessary fields?

A. Field Technician Page Layouts

B. Field Technician Visualforce Pages

C. Field Technician Field Sets

D. Field Technician Mini-Page Layouts

ANSWER: A

Explanation:

Field Technician Page Layouts are correct because page layouts determine which fields, related lists, and actions are presented to users for a given object. A consultant can create streamlined page layouts for Work Orders and Service Appointments that contain only the information technicians need while working in the field. The layouts can then be assigned through the Field Technician profile or an appropriate record type/profile assignment, allowing dispatchers to retain a more detailed layout that supports scheduling, coordination, and back-office work.

This approach supports both a focused mobile experience and appropriate data access design. The layout controls presentation rather than changing the underlying data model, so the organization can maintain the same Work Order and Service Appointment records while tailoring the user interface to each job role. In Field Service, technicians commonly need concise operational details, such as status, service information, address, and required instructions, whereas dispatchers often require broader scheduling and management information. Salesforce documents that page layouts control the fields and related information users see on record detail pages, and Field Service mobile configuration uses Salesforce record-page configuration to shape technicians' work experience. See Salesforce Help: Page Layouts and Trailhead: Configure the Field Service Mobile App.

QUESTION NO: 2

Universal Containers has a customer who requests that the same Technician be assigned whenever possible because the Technician is familiar with the customer's equipment. Which two configurations should a Consultant implement? Choose 2 answers.

A. Create a Resource Preference for the Account and Service Resource.

B. Add a Resource Preference work rule to the Scheduling Policy.

C. Create an Account Team for the preferred Technician.

D. Assign the preferred Technician as the Work Order owner.

ANSWER: A B

Explanation:

Create a Resource Preference to relate the preferred Service Resource to the customer account. Resource Preferences store preferred or required relationships between a service resource and a related record, such as an Account or Asset.

Add a Resource Preference work rule to the Scheduling Policy. The scheduling policy must evaluate the preference during scheduling and optimization. With both configurations in place, the scheduling engine can favor the customer's preferred Technician when the Technician is otherwise eligible and available.

QUESTION NO: 3

Universal Containers provides multiple service types (i.e, Installation, Maintenance, Break/Fix, etc). Each Service requires a variety of skills and certifications in order for a resource to excel. Which two configurations should a Consultant implement to meet this requirement? Choose 2 answers

A. Create Multiple Work Orders Line Items per service.

B. Select the relevant Work Types for each Resource.

C. Assign the appropriate Skills to Resources.

D. Use Work Types with required Skills.

ANSWER: C D

Explanation:

Assign the appropriate Skills to Resources and use Work Types with required Skills together provide the Field Service skill-matching model needed for different kinds of service work. A Work Type represents a repeatable category of work, such as installation, maintenance, or break/fix. The consultant can define the skills required for each Work Type, including the required skill level, so the requirements are consistently applied whenever that type of work is created. Resources are then associated with the skills and qualifications they possess, along with their skill levels. This creates a structured comparison between the work's requirements and each candidate resource's capabilities.

With these configurations in place, scheduling and optimization can identify or prioritize service resources whose assigned skills meet the requirements inherited from the Work Type. This supports accurate dispatching while allowing the organization to maintain distinct requirements for each service offering. It also makes ongoing administration scalable: changes to a service's requirements are made at the Work Type, and changes to an individual's credentials are made on that resource's skill assignments. Salesforce describes how Work Types standardize work requirements and how skills are used for matching in Work Types and Skills in Field Service.

QUESTION NO: 4

When should both the Root Work Order and Root Work Order Line Item fields be added to page layouts?

A. When a service process dictates that there are two levels in a Work Order Hierarchy and two levels in the Work Order Line Hierarchy. (Parent Work Order can be used)

B. When a service process dictates that there is a single level in a Work Order Hierarchy and more than two levels in the Work Order Line Hierarchy.

C. When a service process dictates that there are more than two levels in a Work Order Hierarchy and more than two levels in the Work Order Line Hierarchy.

D. When a service process dictates that there are more than two levels in a Work Order Hierarchy and more than a single level in the Work Order Line Hierarchy.

ANSWER: C

Explanation:

"When a service process dictates that there are more than two levels in a Work Order Hierarchy and more than two levels in the Work Order Line Hierarchy." is correct. The Parent Work Order and Parent Work Order Line Item relationships directly identify only the immediately preceding record. For a hierarchy with more than two levels, users and automation often need to identify the topmost record without traversing multiple parent relationships. The Root Work Order field provides that top-level work order reference, while the Root Work Order Line Item field provides the corresponding top-level line-item reference. Adding both fields to the relevant page layouts makes the complete hierarchy context visible to dispatchers, technicians, and other users who manage complex, multi-level service work. This is especially useful when a root work order contains child work orders and those records contain further descendants, while the service tasks or components also use nested line items. Salesforce Field Service supports work orders and work order line items as related records for structuring and tracking service work; hierarchy design should expose the relationship fields needed for the depth of the organization's process. See Salesforce Trailhead: Work Orders and Work Order Line Items and Salesforce Help: Field Service.

QUESTION NO: 5

In the dispatch Console, when viewing the Map, which three data elements can be presented to the Dispatcher? Choose 3 answers

A. Google Traffic Data

B. Resource's Home Base

C. Service Appointments

D. Resource's Travel Speed

E. Service Appointment Dependencies

ANSWER: A B C

Explanation:

In the Field Service Dispatcher Console, the map is designed to give dispatchers geographic context for scheduling and optimization decisions. **Google Traffic Data** can be displayed as a map layer when the organization has configured Google Maps integration and enabled traffic information. This helps a dispatcher assess current road conditions while considering travel and appointment assignment decisions.

Resource's Home Base can be represented on the map because a service resource can be associated with a home base location. Seeing that location helps dispatchers understand where a technician begins or is anchored geographically when reviewing the service territory and planned work.

Service Appointments are core map entities in the Dispatcher Console. Their map markers show where work must be performed, and dispatchers use those locations together with resource locations, territories, and scheduling information to assign and manage work visually. Salesforce describes the console map and its configurable layers in its Field Service documentation. See Salesforce Help: Dispatcher Console Map and Salesforce Help: Service Resources.

QUESTION NO: 6

Universal Containers typically performs installs, break-fix, and inspections for all clients. The Service Manager wants to create a template for common work requests. What should a Consultant implement to assist the dispatch team?

A. Work Order Record Types for Break-fix, Install, and Inspection.

B. Work Type Line Items for Install, Break-fix, and Inspections.

C. Work Types and Skill Requirements for Install, Break-fix, and Inspections.

D. Work Order custom fields to define Install, Break-fix, and Inspections.

ANSWER: C

Explanation:

Work Types and Skill Requirements for Install, Break-fix, and Inspections is correct because Work Types provide Field Service with reusable templates for recurring categories of work. A consultant can create a distinct Work Type for each common request, such as an installation, a break-fix visit, or an inspection, and define consistent operational details including estimated duration, required skills, operating hours, and preferred resources. When dispatchers create work orders or work order line items, applying the relevant Work Type standardizes the request and reduces repetitive manual entry.

Skill Requirements are especially useful to the dispatch team because they translate the type of work into the qualifications a service resource must hold. Field Service can then use those requirements when identifying or optimizing assignments, helping ensure that an installer, repair technician, or inspector is appropriately qualified for the appointment. This combination supports both the requested templating goal and efficient, capability-based scheduling. Salesforce describes Work Types as templates for commonly performed work and explains how skills help match service resources to the work they are qualified to perform. See Salesforce Help: Work Types and Salesforce Trailhead: Skills-Based Routing.

QUESTION NO: 7

A Dispatcher at Universal Containers has just been informed that one of their field employees, who has five services schedules for today, called in sick. How should the workload be assigned to other Field Technicians?

A. Drag and drop the Service Appointments to other available Resources and run Optimization.

B. Ask the Customer Service Rep to call the customers and manually re-schedule for another day.

C. Change the Scheduling Policy to “High Intensity” and activate the Background Optimization process.

D. Update the Resource as not available, select the affected Service Appointments, and click “Schedule.”

ANSWER: D

Explanation:

Update the Resource as not available, select the affected Service Appointments, and click Schedule. This is the appropriate dispatcher workflow for an unplanned same-day absence. Recording that the service resource is unavailable ensures that Field Service scheduling does not consider the absent technician when evaluating candidates. The dispatcher can then select the appointments impacted by the absence and use the Schedule action to have the scheduling engine evaluate eligible replacement technicians according to the active scheduling policy.

The scheduling engine considers the appointment requirements and relevant constraints, such as required skills, operating hours, service territories, travel, resource availability, and scheduling-policy objectives. It then proposes or assigns suitable technicians while preserving the appointments’ same-day service intent when feasible. This approach keeps availability data accurate and uses Field Service’s scheduling logic rather than relying on informal reassignment. For detailed guidance on tracking planned and unplanned technician time away, see Salesforce’s Manage Resource Absences documentation. Salesforce also explains dispatcher scheduling workflows in the Field Service Dispatch Trailhead unit.

QUESTION NO: 8

Universal Containers wants to use Work Types, since many of their Work Orders require the same Field Service Technician skills. What should the Consultant consider when using Work Types?

A. A change to the skills on a Work Type will affect the required skill on Work Orders previously created from that Work Type.

B. A Work Order inherits the Work Types required skills; however, the user has the ability to add/remove skills on the Work Order.

C. An existing Work Order Line Item will inherit the required skill of a Work Type, regardless of any existing required skills.

D. A Work Order Line Item will inherit their parent Work Order’s Work Type Skills, and the user is unable to make additional changes.

ANSWER: B

Explanation:

A Work Order inherits the Work Types required skills; however, the user has the ability to add/remove skills on the Work Order. Work Types provide a reusable template for common work, including the skills needed to complete it. When a Work Type is applied to a Work Order, Field Service copies the Work Type’s required skills to the Work Order as required-skill records. This gives dispatchers and scheduling processes a clear set of technician qualifications to evaluate when identifying candidates for the work.

The inherited skills are not permanently locked to the Work Type definition. Users can tailor the specific Work Order by adding requirements that are unique to that job or removing requirements that do not apply. This flexibility is important when a standard job normally needs a consistent baseline of skills but a particular customer, asset, location, or task changes the qualifications needed. The scheduler then uses the Work Order’s current required skills when evaluating service resources. Salesforce documents Work Types as reusable definitions that can include skill requirements, and documents required skills

as records that identify qualifications needed for work. See Salesforce Help: Work Types and Salesforce Help: Required Skills.

QUESTION NO: 9

Universal Containers' (UC) Technicians often report seeing competitor's assets when on-site. UC would like to run a report on which of their customers have competitive assets. How should a Consultant recommend meeting this requirement using the Field Service mobile app?

A. Manually create a competitor's Asset Record on the Field Service mobile app.

B. Use a Quick Action to create a competitor Asset Record on the Field Service mobile app.

C. Use a Quick Action to create a Note to explain the competitor's Asset and attach it to the Work Order.

D. Use a Macro to create a competitor Asset Record on the Field Service mobile app.

ANSWER: B

Explanation:

Use a Quick Action to create a competitor Asset Record on the Field Service mobile app. A quick action gives a technician a guided, mobile-accessible way to capture the competitor asset while working at the customer site. The action can be configured to create an Asset record and expose the fields needed to identify the competitive equipment, such as its name, product details, and the customer account or location associated with it. Because the observation is saved as a structured Asset record rather than free-form narrative, UC can use Salesforce reporting to identify customer accounts that have competitor assets and analyze those records consistently across the organization. The mobile action can be added to the relevant Field Service mobile page or action layout so that technicians can record the information in the context of their assigned work. This approach supports timely data capture in the field while maintaining a reportable relationship between the competitive asset and the customer. Salesforce describes assets as records used to represent items associated with accounts in its Field Service asset-management guidance. Salesforce also documents configuring mobile actions and layouts in the Field Service Mobile configuration documentation.

QUESTION NO: 10

Universal Containers is experiencing an issue where Technicians are repeatedly called back to a job that has been completed in the past. How should a Consultant recommend this information be tracked?

A. Create a new Work Order and relate it to the previous Work Order.

B. Create a new Work Order and relate it to the Customer.

C. Update a field called "Repeat Call" on the initial Work Order.

D. Create new Work Order Line Items under the initial Work Order.

ANSWER: A

Explanation:

Create a new Work Order and relate it to the previous Work Order. is the appropriate approach because every return visit represents a distinct piece of work with its own lifecycle, scheduling requirements, assigned service resources, status changes, service appointments, parts, labor, and completion details. Creating a separate work order preserves an accurate operational and service-history record rather than blending work performed on different dates into one completed record.

Field Service supports work-order hierarchies through the Parent Work Order relationship. The consultant can create the return-visit work order as a child of the original work order, linking the records so dispatchers and technicians can see that the new job is follow-up work associated with an earlier completed job. This relationship also makes it easier to report on repeat visits, identify recurring asset or service issues, and review the complete history when diagnosing quality or resolution concerns.

The new work order can then proceed independently through normal Field Service processes, including creation of its own service appointment and assignment to an appropriate technician. Salesforce documents the Work Order object and its parent-work-order relationship in the Work Order Object Reference. For broader Field Service work-order concepts, see the Salesforce Trailhead work orders module.

QUESTION NO: 11

Universal Containers has noticed that with every new product release there is a rise in customer reported Cases and a decrease in first-time fix-rate. Which two recommendations should a Consultant make? Choose 2 answers.

A. Publish training documentation in a closed chatter group.

B. Increase training to Sales Representatives.

C. Publish pre-release documentation on the Customer Community.

D. Increase training to Field Service Technicians

ANSWER: C D

Explanation:

Publishing pre-release documentation on the Customer Community gives customers timely, product-specific guidance before and immediately after a release. Release notes, setup instructions, known-issue information, and troubleshooting articles can help customers understand changed behavior and resolve common questions through self-service. This directly supports case deflection by making trusted answers available where customers seek help. Salesforce Experience Cloud supports exposing knowledge content to external users, while Salesforce Knowledge is designed to provide searchable articles across service channels.

Increasing training to Field Service Technicians addresses the declining first-time fix rate because technicians need to understand new products, revised installation or repair procedures, diagnostic steps, and required parts before arriving on site. Effective enablement ensures that the mobile workforce can apply consistent processes and use the relevant information during execution. In Field Service, work instructions and related knowledge can be made available to mobile workers to support accurate, efficient service completion. Together, proactive customer documentation and technician readiness reduce avoidable support demand while improving the likelihood that an on-site job is completed correctly on the first visit. See Salesforce guidance on Salesforce Knowledge and Field Service work instructions.

QUESTION NO: 12

The Dispatcher at Universal Containers would like to schedule Service Appointments from the Dispatcher's Console while taking the Scheduling Policy into consideration. Which three options are available to the Dispatcher? Choose 3 answers

A. Select a Service Appointment from the list, press the "Edit" action and allocate the Resource.

B. Select a Service Appointment from the list and press the "Schedule" action.

C. Select multiple Service Appointments from the list and bulk schedule them.

D. Select a Service Appointment from the list, press the "Candidates" action, and select the best time slot.

E. Select a Service Appointment from the list, press the "Change Status" action and "Dispatch."

ANSWER: B C D

Explanation:

Scheduling from the Dispatcher Console can apply the active scheduling policy, which evaluates defined objectives, service objectives, work rules, resource availability, skills, operating hours, territories, and other scheduling constraints. "Select a Service Appointment from the list and press the "Schedule" action." is available when a dispatcher wants Salesforce Field Service to identify and assign an appropriate resource and time based on that policy. "Select multiple Service Appointments from the list and bulk schedule them." is also supported, enabling the dispatcher to submit multiple appointments for policy-

based scheduling rather than processing each appointment individually. “Select a Service Appointment from the list, press the “Candidates” action, and select the best time slot.” provides a dispatcher with policy-evaluated candidate options. This supports a guided dispatch decision: the scheduling engine identifies feasible and ranked candidate assignments, and the dispatcher selects the most suitable proposed slot or resource. These console actions combine automated policy evaluation with the dispatcher’s operational control over appointment assignment. See Salesforce’s Dispatcher Console documentation and its guidance on scheduling policies.

QUESTION NO: 13

Universal Containers would like to enforce a 48-hour SLA to ensure that Technicians perform certain

follow-up activities after they leave a customer site. The starting point of the SLA is when the Work Order Status is set to “Technician Wrap Up.” The Technician is required to provide confirmation that wrap up is completed. Which three configurations should a Consultant implement to ensure this can be achieved? Choose 3 answers

A. Create an Entitlement Process which has entry criteria for Status = Technician Wrap Up.

B. Create a Milestone which has entry criteria for Status = Technician Wrap Up.

C. Create custom fields to capture that the Wrap UP Activities have been completed.

D. Create a Workflow to close the Milestone when the Wrap Up is complete.

E. Create a Process Builder to close the Milestone when the Wrap Up is complete.

ANSWER: A C D

Explanation:

Creating an Entitlement Process which has entry criteria for Status = Technician Wrap Up establishes the point at which the Work Order becomes subject to the SLA. When the Work Order reaches that status, the entitlement process can begin tracking the required service commitment. The entitlement process contains the applicable milestone and its 48-hour target, allowing Salesforce to measure the time permitted for the post-visit work.

Creating custom fields to capture that the Wrap UP Activities have been completed gives technicians a clear, auditable way to confirm completion. These fields can be exposed on the Work Order and made required through the appropriate page layout, validation, or guided user experience so that the business has explicit confirmation rather than relying solely on a status change.

Creating a Workflow to close the Milestone when the Wrap Up is complete connects the technician’s recorded confirmation to SLA tracking. The workflow can evaluate the completion field values and complete the active milestone, which records whether the work was completed within the defined 48-hour period and permits any configured success actions to run. Salesforce describes entitlement processes and milestones as the mechanisms for defining and tracking service-level commitments in its Entitlements overview and Milestones documentation.