Certification Exam Guide

SALESFORCE CERTIFIED FIELD SERVICE LIGHTNING CONSULTANT

Spring '18

CONTENTS

ABOUT THE SALESFORCE CERTIFIED FIELD SERVICE LIGHTNING CONSULTANT PROGRAM

The Salesforce Certified Field Service Lightning program will define a standard body of knowledge to build a structured skill set within the market and to achieve consistency in skills and knowledge within the Salesforce Certified Field Service Lightning community. The objective of the Salesforce Certified Field Service Lightning Consultant program is to test and certify qualified implementation consultants for Partners and Salesforce teams (such as Services, CFL and Support). It also applies to Senior Salesforce Administrators for organizations deploying Field Service Lightning.

SECTION 1. PURPOSE OF THIS EXAM GUIDE

This exam guide is designed to help you prepare for the Field Service Lightning Consultant exam. This guide provides information about the target audience, the recommended training and documentation, and a complete list of exam objectives. Salesforce highly recommends a combination of on-the-job experience and self-study to maximize your chances of passing the exam.

SECTION 2. AUDIENCE DESCRIPTION: SALESFORCE CERTIFIED FIELD SERVICE LIGHTNING CONSULTANT

A Salesforce Field Service Lightning Consultant has proven experience with the administration and configuration of a Salesforce application and is capable of consulting with customers on Field Service operations. Additionally, the consultant is capable of implementing Salesforce Service Cloud and Field Service Lightning solutions in a customer-facing role. The consultant is able to design and deploy solutions that support Field Service business processes and requirements using Salesforce applications. The consultant has experience designing solutions using the Field Service Lightning functionality and can lead the design of these solutions within a customer organization. The consultant has field service industry experience, mobile solution expertise, and a solid understanding of Salesforce applications including the knowledge needed to implement multiple applications in common customer scenarios. The consultant should have approximately 2–5 years of experience as a Senior Business Analyst in addition to a minimum of 2 years in a Field Service environment and has developed the skills outlined below:

- Field Service Life Cycle
- Explain the Salesforce product lines (Service Cloud, Communities, Knowledge, Mobile, Platform, Sales Cloud, Field Service Lightning)
- Design and implement successful Field Service solutions
- Build Field Service solutions that are scalable and maintainable:
  - Scheduling and optimization
  - Resource management
  - Asset management
  - Inventory management
  - Work Order and Service Appointments lifecycle management
  - Contract, entitlements, and warranty
  - Mobility
  - Quoting and invoicing
- Prescribe business process optimization based on Field Service Lightning capabilities and customer needs

SECTION 3. ABOUT THE EXAM

The Salesforce Certified Field Service Lightning Consultant exam has the following characteristics:

- Content: 60 multiple-choice/multiple-select questions* (five unscored questions may be added)

- Time allotted to complete the exam: 90 minutes (time allows for unscored questions)

- Passing score: 70%

- Registration fee: USD $200, plus applicable taxes as required per local law

- Retake fee: USD $100, plus applicable taxes as required per local law

- References: No hard-copy or online materials may be referenced during the exam.

- Delivery options: Proctored exam delivered onsite at a testing center or in an online proctored environment. Click here for information on scheduling an exam.

- Prerequisite(s): Salesforce Certified Administrator credential and Salesforce Certified Service Cloud Consultant credential

*Please note that as of November 16, 2017, all Salesforce certification exams will contain five additional, randomly placed, unscored questions to gather data on question performance. The duration of each exam has been evaluated and adjusted to accommodate the inclusion of the unscored questions. These five questions will be in addition to the 60 scored questions on your exam, and will have no impact whatsoever on your score.

When evaluating questions and answers, please consider all currently available features including those available in either Lightning Experience or Salesforce Classic.

SECTION 4. RECOMMENDED TRAINING AND REFERENCES

As preparation for this exam, Salesforce recommends a combination of: hands-on experience, training course completion, Trailhead trails, and self-study in the areas listed in the Exam Outline section of this exam guide.

To enroll in instructor-led courses and launch online training from your Salesforce application, click the **Help & Training** link in the upper right corner of the screen (requires login) and search for the desired courses. Non-Salesforce customers can register for instructor-led courses [here](#).

To review online Documentation, Tip Sheets, and User Guides, search for the topics listed in the Exam Outline section of the exam guide and study the information related to those topics. Documentation, Tip Sheets, and User Guides can also be accessed through **Help & Training.**

Trailhead trails can be accessed [here](#).

SECTION 5. EXAM OUTLINE

The Salesforce Certified Field Service Lightning Consultant exam measures a candidate's knowledge and skills related to the following objectives. A candidate should have hands-on experience implementing Salesforce Service Cloud and Field Service Lightning solutions and have demonstrated the application of each of the features/functions below.

MANAGE ASSETS

- Apply procedural concepts to maintain and update bill of materials (BoM)
- Determine how to manage and track asset installation, movement, and/or decommission

Weighting
5%
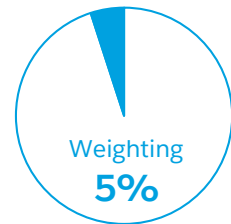
CONFIGURE CONTRACTS, ENTITLEMENTS, AND WARRANTIES

- Apply procedural concepts to setup entitlement process for work order object
- Given a scenario, evaluate options to upsell or add needed entitlements
- Recommend and apply entitlements model to customer scenarios

Weighting
8%
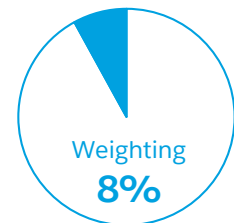
MANAGE CASE

- Troubleshoot, escalate, and resolve cases based on field service scenarios
- Determine how to build work order processes, parameters, and templates

Weighting
**7%**
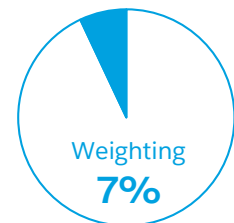
MANAGE WORK ORDER

- Apply procedural concepts to create work orders as they relate to assets, accounts, and contacts including relative entitlements
- Identify resource requirements
- Determine how to apply parts required for a work order
- Apply procedural concepts to capture necessary data to complete a work order
- Determine the attributes required to measure effective KPIs

Weighting
32%
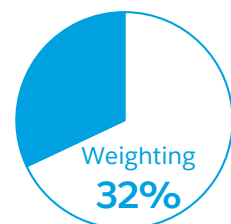
- Assess the requirements and tools needed to execute a customer sign-off process

- Determine work order closure processes and associated follow-up tasks

MANAGE SCHEDULING AND OPTIMIZATION

- Identify how to setup technicians or equipment assigned to schedule a work order

- Recommend how to implement 3rd party resources

- Given client requirements, determine the life cycle of a service appointment required to execute a work order

- Define the Schedule Policies to achieve the business outcomes

- Apply procedural concepts to manage dispatch including multiple scheduling scenarios based on business requirements

Weighting
28%
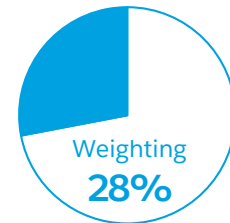
CONFIGURE MOBILITY

- Determine when to apply quick actions

- Determine how to configure Field Service app to support key business processes

- Distinguish between Field Service Mobile and Salesforce mobile app capabilities

- Apply procedural concepts to complete service appointments in the mobile environment

Weighting
17%
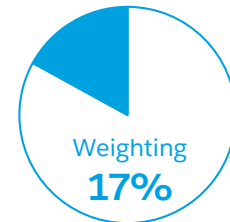
MANAGE INVENTORY

- Given business requirements, determine price book model in relation to products

- Given business requirements, determine principles to support applicable inventory model

Weighting
3%
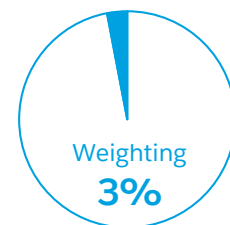
SECTION 6. SAMPLE EXAM QUESTIONS

The following questions are representative of those on the Salesforce Certified Field Service Lightning Consultant exam. These questions are *not* designed to test your readiness to successfully complete the certification exam, but should be used to become familiar with the types of questions on the exam. The actual exam questions may be more or less difficult than this set of questions.

1. Universal Containers (UC) sells several different product lines, some of which are made of component parts. UC wants to sell service plans that apply at the component level.

   What level of tracking should a Consultant recommended?

   A. Service Contract level

   B. Contract Line Item level

   C. Account level

   D. Product model level

2. Universal Containers has implemented Entitlement Management and needs to have the Entitlement automatically linked to Cases created via email.

   How can a Consultant implement this requirement?

   A. Visualforce Page

   B. Workflow Rule

   C. Apex Trigger

   D. Assignment Rule

3. The Service Manager for Universal Containers wants Field Technicians to be able to access the bill of materials for a customers' products and view other helpful documentation from their mobile device.

   What should a Consultant configure to meet this requirement?

   A. Custom Fields on the Work Orders for Solutions.

   B. Knowledge Base Articles linked to Work Orders.

C. Custom Visualforce Pages linked to the Work Order.

D. Asset hierarchies of installed products.

4. Field Technicians at Universal Containers must see Address, Subject, Status, and Account of the Work Order at the top of the Service Appointment Overview Screen in the Field Service mobile app.

Where should a Consultant make these field updates?

A. Service Appointment Mini-Page Layout

B. Work Order Compact Layout

C. Work Order Field Sets

D. Service Appointment Mobile Page Layout

SECTION 7. ANSWERS TO SAMPLE EXAM QUESTIONS

1. B

2. C

3. D

4. B

SECTION 8. MAINTAINING A CERTIFICATION

One of the benefits of holding a Salesforce credential is always being up to date on new product releases. Our release exams are designed to ensure you have the latest information you need to be a successful Salesforce Certified expert.

Bookmark these useful resources for maintaining your credentials:
· [Maintenance Exam Due Dates](#)
· [Credential Status Request Overview](#)
· [Overall Maintenance Requirements](#)

Don't let your hard-earned credential expire! Once you earn the credential, if you do not complete all maintenance requirements by the due date, your credential will expire, or in some cases, become suspended. For more information, click [here](#).

ABOUT TRAILHEAD

Trailhead is your path into the Salesforce economy. It's the fun way to learn the skills you need to transform your company, earn credentials that grow your career, and connect with a global movement of Trailblazers to continue learning together.

The fun way to learn Salesforce

LEARN
Learn at your own pace, from our experts, and your peers.

EARN
Earn points, badges, and skill-based credentials that grow your resume.

CONNECT
Connect with fellow Trailblazers to learn, inspire, and blaze new trails.

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