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## Salesforce AP-209 Exam Syllabus Topics:

Topic	Details
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Topic 1	<ul style="list-style-type: none"> <li>• <b>Implementation Strategies and Design:</b> This domain covers the full consulting project lifecycle from planning and requirements gathering through deployment, and determining appropriate deployment strategies and licensing needs for Field Service implementations.</li> </ul>
Topic 2	<ul style="list-style-type: none"> <li>• <b>Optimization:</b> This domain covers using service objectives for automated scheduling, global optimization engine capabilities, troubleshooting optimization issues, and strategies to improve scheduling quality and efficiency.</li> </ul>
Topic 3	<ul style="list-style-type: none"> <li>• <b>Resource Management:</b> This domain focuses on managing resource availability, Service Territory Management capabilities, handling different resource types, and implementing optimal scheduling strategies for field service personnel.</li> </ul>

## Salesforce Advanced Field Service Accredited Professional Sample Questions (Q19-Q24):

### NEW QUESTION # 19

Green Energy Solutions provide two types of services: 'New Installs' (high revenue, high priority with a 3 day SLA) and 'Inspections' (proactive, low priority activities due 3 months out). The company incurs a penalty for missing due dates which the service manager would like to avoid. However, not at the expense of a new install.

What should the consultant's recommendation be in such a case?

- A. Add the 'ASAP' Service Objective to the Scheduling Policy, with a 'Relevance Group' that only considers new installs. Set the weight of that Service Objective to be higher than the 'Priority' Service Objective
- B. Use a 'Dynamic Priority' formula field that increases the value of the priority each day, up to a value of '2' (using the 1-100 scale) and set the priority of the new install jobs to '1'
- C. Set up an automation that sets the priority value to '1' for all inspections that are due tomorrow, and set the priority of the New install jobs to '1' as well
- D. For inspections with a due date taking place in the next 7 days, set the 'Schedule Over Lower Priority' Boolean to 'True'

**Answer: C**

Explanation:

The goal is to prevent low-priority "Inspections" from being ignored indefinitely until they miss their deadline, without permanently ranking them above high-value "New Installs."

\* Option B is correct(based on the scenario's specific constraints). By using automation to elevate the Inspection's priority to '1' (High) only when it is due "tomorrow," the system treats it as urgent only when necessary to avoid the penalty. Since "New Installs" are also Priority '1', the two will compete on equal footing on that final day, ensuring the Inspection has a fighting chance to be scheduled alongside high-value work.

\* Option C (Dynamic Priority) is a standard solution for "aging" work. However, the option states it caps the value at '2'. In standard SFS priority (where 1 is highest), a '2' will never beat a '1'. Therefore, the inspection would still likely be bumped by a New Install (Priority 1) even on its due date, leading to a penalty.

\* Option D ("Schedule Over Lower Priority") is used for emergency reshuffling, but does not inherently solve the prioritization logic between these two specific task types.

### NEW QUESTION # 20

A customer outsources some of the work to contractors. The contractors in company A need to be able to accept up to 4 hours of maintenance work per day, but their resources only work 9-10 am. They manage the scheduling and order of these jobs outside of Salesforce.

Contractor company B also must only accept 4 hours of work per day but work from 9-5 pm and manage their schedule inside Salesforce. The customer is using optimization.

Which two configurations need to be created to support the requirement?

- A. Configure a 'Scheduling Count Rule' with a 'Count Type' of 'Duration' to limit work for all resources. Set Operating Hours to 9-10 am for contractor group A and 9-5 pm for contractor group B
- B. Configure 'Capacity Based Resources' with an 'Hours Per Time Period' of 4 and a 'Time Period' of 'Day' for contractor group A. Set Operating Hours to 9-10 am for contractor group A resources and use 'Schedule Over Lower Priority' to allow for overbooking resources

- C. Configure 'Capacity Based Resources' with an 'Hours per Time Period' of 4 and a 'Time Period' of 'Day' for contractor group A. Set Operating Hours to 9-10 am for contractor group A resources
- D. Configure a 'Scheduling Count Rule' with a 'Count Type' of 'Duration' to limit work. Use 'Relevance Groups' to apply this to resources in contractor group B. Set Operating Hours to 9-5 pm for contractor group B

**Answer: C,D**

Explanation:

This scenario distinguishes between "External" contractors (buckets of work) and "Internal/Named" contractors (managed schedule).

\* Option C (Contractor A): Since they manage work outside Salesforce and work specific hours (9-10 am), they should be modeled as Capacity-Based Resources. This feature allows you to define a "bucket" of capacity (4 hours/day) without optimizing individual travel or start times. You simply dump work into their bucket until it is full.

\* Option A (Contractor B): Since they manage the schedule inside Salesforce (likely named users), they act like standard employees. To limit them to 4 hours of work within a 9-5 shift, you use a Work Rule (Count Rule). You configure the rule to limit "Duration" to 240 minutes (4 hours) per day and use a Relevance Group to ensure this rule only applies to Contractor B (not internal employees or Contractor A).

## NEW QUESTION # 21

Which three topics should a consultant raise during the project scoping discussion of a field service implementation?

- A. Sprint Review: to review what will be done during the sprint cycle
- B. Work Parameters: how work is being defined
- C. Solution Design: request for acceptance
- D. Terminology: translate objectives and priorities into Field Service
- E. Project Objectives: what is essential

**Answer: B,D,E**

Explanation:

During Scoping (the initial phase), the goal is to align on the "What" and "Why" before moving to the "How."

\* Option A is correct (Work Parameters): You must define what constitutes a "Job" (Work Order), how long it takes, and what skills are needed. This is the foundation of the data model.

\* Option C is correct (Terminology): Mapping the customer's language to Salesforce terms (e.g., "We have 'Truck Rolls' -> In Salesforce, that is a 'Service Appointment'") is crucial to avoid confusion throughout the project.

\* Option D is correct (Project Objectives): Defining what is "Essential" (MVP) vs. "Nice to Have" sets the project boundaries and success metrics.

\* Option B (Sprint Review) happens during the build phase (Agile methodology), not during initial scoping.

\* Option E (Solution Design) is the output of the scoping/analysis phase, not a topic you ask about during the initial discovery.

## NEW QUESTION # 22

Universal Containers (UC) outsources all maintenance work to contractors, based on a contract that is renewed on a yearly basis.

When a contract is terminated, UC would like to ensure that new maintenance Work Orders will not be scheduled for the terminated contractor.

Which two steps should an admin take to ensure their requirements are met?

- A. Deactivate the Service Resource
- B. Add the 'Excluded Resources' Work Rule to the Scheduling Policies
- C. Add the 'Active Resources' Work Rule to the Scheduling Policies
- D. Delete the Service Resource

**Answer: A,C**

Explanation:

To stop a resource from receiving work, you must mark them as inactive and ensure the scheduling engine respects that status.

\* Option C is correct: Deactivating the Service Resource (unchecking the "Active" checkbox on the record) is the standard way to "fire" or terminate a resource. It preserves history but flags them as no longer working.

\* Option A is correct: You must ensure your Scheduling Policy includes the Active Resources Work Rule. This rule explicitly tells the optimization engine: "Do not assign appointments to any resource where Active = False." Without this rule, the engine might still

technically assign work to an inactive record if no other constraints block it.

\* Option B(Delete) is bad practice (data loss).

\* Option D(Excluded Resources) is for specific job-by-job exclusions (e.g., "Don't send Bob to this specific customer"), not for global termination.

### NEW QUESTION # 23

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

How can a consultant implement this requirement?

- **A. Create 'Match Boolean' Work Rule and include it in the Scheduling Policy**
- B. Create 'Count Rule' 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 Field' Work Rule and include it in the Scheduling Policy

**Answer: A**

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.

### NEW QUESTION # 24

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