

SERVICE CLOUD PRACTICE TEST (SAMPLE)

STUDY GUIDE



**SAMPLE STUDY GUIDE
WITH LIMITED QUESTIONS**

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THE FULL VERSION STUDY GUIDE**

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Introduction

Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.

This guide was designed to help you do exactly that.

Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.

The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:

- Practice answering questions under realistic conditions,
- Improve accuracy and speed,
- Review explanations to strengthen weak areas, and
- Approach the exam with greater confidence.

We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.

Remember: successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.

Let's begin.

How to Use This Guide

This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here's how to get the most out of your Examzify study guide:

1. Start with a Diagnostic Review

Skim through the questions to get a sense of what you know and what you need to focus on. Your goal is to identify knowledge gaps early.

2. Study in Short, Focused Sessions

Break your study time into manageable blocks (e.g. 30 – 45 minutes). Review a handful of questions, reflect on the explanations.

3. Learn from the Explanations

After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.

4. Track Your Progress

Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.

5. Simulate the Real Exam

Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.

6. Repeat and Review

Don't just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning. Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.

There's no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly, adapt the tips above to fit your pace and learning style. You've got this!

Questions

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- 1. What should be used to see a complete chronological list of a case's field edits, associated emails, case comments, and edits to related objects in a single view while working on a case?**
 - A. Create a custom-related list on the case.
 - B. Create a custom report.
 - C. Create a custom view on the Case tab (or Case Feed).
 - D. Create a custom Visualforce page.

- 2. As part of migrating articles to Lightning Knowledge, which factor should a consultant consider?**
 - A. Convert any articles containing HTML into plain text before importing because HTML is NOT supported in any article field types.
 - B. Prepare a single .csv file that can be used to migrate all article types at once and include with a .properties file in a .zip for Import.
 - C. Verify that each article type has field-level security on all fields set to read-only prior to import, in order to prevent any loss of data.
 - D. Ensure that each existing article type has a corresponding Salesforce knowledge article record type that matches its structure and content.

- 3. Which feature enables agents to share updates on a case with teammates via a feed?**
 - A. Chatter feed tracking on the case.
 - B. Knowledge sidebar.
 - C. Escalation rules.
 - D. Email-to-case automation.

- 4. Which automation helps re-assign cases after an SLA has expired?**
 - A. Enable Service Cloud console and Knowledge sidebar for agents.
 - B. Create case teams and swarming to resolve cases.
 - C. Enable and use Chatter feed tracking in the case object.
 - D. Create escalation rules to re-assign cases after SLAs have expired.

- 5. To provide customers with access to public installation guides, FAQs, and warranty information, which Salesforce feature should be implemented?**
 - A. Implement Recommended Articles
 - B. Partner Control Community
 - C. Web-To-Case
 - D. Customer Community

- 6. Which option best aligns with unifying channels and managing agent workload in Service Cloud?**
- A. Omni-Channel queue-based routing.
 - B. Case auto-response.
 - C. Email-to-case.
 - D. Knowledge base.
- 7. Which feature enables maintaining different stages and fields for maintenance cases compared to new product cases?**
- A. Approval Processes
 - B. Record Types
 - C. Support Processes
 - D. Support Types
- 8. What is the initial action required to configure Omni Channel?**
- A. Assign Users to the Omni Channel Feature License.
 - B. Assign Users to Omni Channel permissions.
 - C. Enable Omni Channel by clicking Settings in Setup.
 - D. Contact Salesforce to have Omni Channel enabled.
- 9. To meet the requirement of improving collaboration on cases, which option is the most direct approach?**
- A. Create escalation rules to re-assign cases after SLAs have expired.
 - B. Enable the Service Cloud console and Knowledge sidebar for agents.
 - C. Create case teams and introduce swarming to resolve cases.
 - D. Enable and use Chatter feed tracking in the case object.
- 10. To satisfy knowledge article search by product type in a customer community, which method should be used?**
- A. Define article types with sharing settings.
 - B. Utilize topic tags for each product type.
 - C. Set the visibility to the data categories.
 - D. Enable suggested articles in the community.

Answers

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1. A
2. D
3. A
4. D
5. A
6. A
7. B
8. C
9. C
10. B

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Explanations

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1. What should be used to see a complete chronological list of a case's field edits, associated emails, case comments, and edits to related objects in a single view while working on a case?

- A. Create a custom-related list on the case.**
- B. Create a custom report.
- C. Create a custom view on the Case tab (or Case Feed).
- D. Create a custom Visualforce page.

The thing being tested is how to view a complete, in-context timeline of everything that happened on a case in one place. A custom-related list on the Case page makes this possible by surfacing all relevant related records directly on the case record. You can tailor this list to include the Case History (field edits), Email Messages, Case Comments, and edits to related objects, so as you work on the case you see a single, chronological view of all updates without switching contexts or jumping to separate reports. This approach is practical because it brings the entire activity history into the Case view itself, keeping the support agent's focus on the case. A custom report wouldn't sit on the Case page or update in real time as you work. A custom view on the Case tab or Case Feed isn't dedicated to a single case's complete history in one place, and a custom Visualforce page, while possible, requires more development work and maintenance.

2. As part of migrating articles to Lightning Knowledge, which factor should a consultant consider?

- A. Convert any articles containing HTML into plain text before importing because HTML is NOT supported in any article field types.
- B. Prepare a single .csv file that can be used to migrate all article types at once and include with a .properties file in a .zip for Import.
- C. Verify that each article type has field-level security on all fields set to read-only prior to import, in order to prevent any loss of data.
- D. Ensure that each existing article type has a corresponding Salesforce knowledge article record type that matches its structure and content.**

When migrating articles to Lightning Knowledge, the key step is to map each existing article type to a corresponding Salesforce Knowledge article record type that matches its structure and content. Lightning Knowledge uses knowledge article types to define what fields exist, how the article is organized, and how it behaves across channels. If every source article type has a matching knowledge article record type, the import can place each field into the correct place, preserve the content and metadata, and maintain consistent how the articles are displayed and managed after import. Without this alignment, fields may not map correctly, layouts can be broken, and data integrity is at risk. Other considerations described in the options aren't as central to a successful migration. HTML formatting isn't universally prohibited in all article fields, so converting everything to plain text isn't a default requirement. Import processes typically require understanding that different article types may need separate imports or mappings rather than one universal CSV, and pre-import field-level security isn't the primary factor for preserving data during the migration; proper mapping and creation of matching record types is what safeguards structure and content.

3. Which feature enables agents to share updates on a case with teammates via a feed?

- A. Chatter feed tracking on the case.**
- B. Knowledge sidebar.
- C. Escalation rules.
- D. Email-to-case automation.

Sharing updates with teammates via a feed on a case is enabled by Chatter feed tracking on the case. This feature attaches a collaborative feed to the case record, allowing agents to post updates, comments, and status changes, and to @mention teammates so everyone stays informed in real time. It also creates an ongoing history of activity for the case. The other options don't provide a case-specific collaboration feed: the Knowledge sidebar is for quick access to articles, escalation rules determine when a case should be escalated, and email-to-case automation creates cases from emails and routes them.

4. Which automation helps re-assign cases after an SLA has expired?

- A. Enable Service Cloud console and Knowledge sidebar for agents.
- B. Create case teams and swarming to resolve cases.
- C. Enable and use Chatter feed tracking in the case object.
- D. Create escalation rules to re-assign cases after SLAs have expired.**

Escalation rules automate what happens when an SLA milestone is breached. In Service Cloud, SLAs are tracked through entitlements and milestones, and escalation rules kick in when a milestone expires or is about to expire. They can automatically reassign the case to another user or queue, trigger notifications, and escalate to supervisors to ensure timely follow-up. This makes them the right automation for re-assigning cases after an SLA has expired, because you're explicitly defining the ownership transfer as part of the breach response. The other options focus on user interface, collaboration, or activity tracking, not automatic reallocation based on SLA timing.

5. To provide customers with access to public installation guides, FAQs, and warranty information, which Salesforce feature should be implemented?

- A. Implement Recommended Articles**
- B. Partner Control Community
- C. Web-To-Case
- D. Customer Community

The main idea here is making self-service content easy to find for customers. Salesforce Knowledge stores installation guides, FAQs, and warranty information as articles, and the way to ensure customers actually see the most relevant ones is to surface recommended articles automatically. Implementing Recommended Articles helps present the right documents to customers based on context, so they can quickly access the guides and FAQs they need without extra searching. The other options don't directly address how to surface or prioritize the content: a Customer Community provides the channel to access articles, but the specific feature that boosts findability and relevance is the Recommended Articles capability; Web-To-Case is for submitting cases, and Partner Control Community is intended for partners, not customers.

6. Which option best aligns with unifying channels and managing agent workload in Service Cloud?

- A. Omni-Channel queue-based routing.**
- B. Case auto-response.
- C. Email-to-case.
- D. Knowledge base.

Omni-Channel queue-based routing unifies all incoming work across channels (chat, email, phone, social, etc.) into a single routing system and assigns items to agents based on real-time availability and skills. This means every new item enters a central queue and is dispatched to an agent who has the capacity to handle it, ensuring balanced workloads and faster response times. The routing respects agent presence, capacity, and skill requirements, so the right item goes to the right agent without overloading anyone. This is why it best fits both unifying channels and managing agent workload. Case auto-response automates replies, not routing or workload balance. Email-to-case converts emails into cases but doesn't provide cross-channel routing or load distribution. The knowledge base supports self-service content rather than routing or workload management.

7. Which feature enables maintaining different stages and fields for maintenance cases compared to new product cases?

- A. Approval Processes
- B. Record Types**
- C. Support Processes
- D. Support Types

Record Types allow you to tailor fields, layouts, and available values for different categories of the same object. By creating one record type for maintenance cases and another for new product cases, each type can have its own page layout and its own set of statuses or picklist values. This means users working on maintenance cases see the fields and stages relevant to maintenance, while users on new product cases see the fields and stages relevant to new products. Approvals route records for sign-off, which is unrelated to differentiating per-type fields and layouts. Support Processes control which statuses are available for a given type, but the core mechanism that lets you maintain distinct stages and fields across case categories is the record type itself.

8. What is the initial action required to configure Omni Channel?

- A. Assign Users to the Omni Channel Feature License.
- B. Assign Users to Omni Channel permissions.
- C. Enable Omni Channel by clicking Settings in Setup.**
- D. Contact Salesforce to have Omni Channel enabled.

Enabling Omni-Channel in Setup is the first step because the feature must be active in your org before you can assign licenses, grant permissions, or configure routing. Turning it on makes the Omni-Channel functionality available for use, after which you assign the feature license to users and grant the necessary permissions so they can access and work with Omni-Channel. Without enabling it first, those subsequent steps can't take effect. While you could contact Salesforce if you don't have admin access, the typical and correct initial action is to enable Omni-Channel through Settings in Setup.

9. To meet the requirement of improving collaboration on cases, which option is the most direct approach?

- A. Create escalation rules to re-assign cases after SLAs have expired.
- B. Enable the Service Cloud console and Knowledge sidebar for agents.
- C. Create case teams and introduce swarming to resolve cases.**
- D. Enable and use Chatter feed tracking in the case object.

Coordinating multiple agents on a single case is best achieved by establishing case teams and using swarming. Case teams define who is involved with a case and what role they play, giving the right people access and visibility to work together. Swarming takes that a step further by bringing together a group of agents to collaboratively resolve the case in real time, sharing context, updates, and next steps, which speeds up resolution and reduces handoffs. This approach directly targets collaboration by design—everyone who needs to contribute can jump in and work on the same issue with coordinated effort. Other options touch on related tools or processes—escalation rules focus on routing, the Service Cloud Console and Knowledge Sidebar boost individual agent productivity, and Chatter feed tracking enables communication—but they don't directly structure group collaboration on a case the way case teams and swarming do.

10. To satisfy knowledge article search by product type in a customer community, which method should be used?

- A. Define article types with sharing settings.
- B. Utilize topic tags for each product type.**
- C. Set the visibility to the data categories.
- D. Enable suggested articles in the community.

Using topic tags for each product type provides a flexible labeling system that directly supports searching and filtering in a customer community. When you tag knowledge articles with product-type topics, users can search with those exact product terms or filter results by topic, giving them quick access to relevant articles for the product they're interested in. This approach creates a consistent taxonomy across all articles and scales as you add more products. Defining article types with sharing settings affects structure and who can view articles but doesn't organize content by product type for search. Data categories control visibility but aren't as user-friendly for product-based search. Suggested articles are about recommendations rather than enabling precise search by product type.

Next Steps

Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.

As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.

If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at hello@examzify.com.

Or visit your dedicated course page for more study tools and resources:

<https://servicecloud.examzify.com>

We wish you the very best on your exam journey. You've got this!

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