

Salesforce Analytics-Con-201

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Consultant

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Question: 1

Universal Containers has a dashboard for sales managers. They need to visualize the percentage of their opportunities in the pipeline in a Gauge chart. They want to customize the chart to keep track if they are below or beyond the target.



Which widget parameters should a consultant use?

- A. Range Values, Angle, Conditional Formatting
- B. Reference Line, Angle, Range Values
- C. Reference Line, Markers, Conditional Formatting

Answer: C

Explanation:

In the scenario described, the sales managers at Universal Containers require a Gauge chart that not only shows the current percentage of opportunities in their pipeline but also indicates whether they are below or beyond their set targets. The appropriate widget parameters to achieve this visualization in Salesforce CRM Analytics (formerly known as Einstein Analytics) are: Reference Line: This parameter is crucial for defining a specific target value on the gauge chart. It visually marks a point that represents the target goal, providing an immediate visual cue as to whether the current percentage is below or above this point.

Markers: Markers are used to represent and highlight specific values on the gauge chart. They can be utilized to emphasize the current percentage level of the pipeline, making it instantly visible how close or far the current value is from the reference line or target.

Conditional Formatting: This feature allows the chart to change color or style based on whether the current values meet, exceed, or fall below the target. It is a critical visual tool for quickly communicating performance against targets. Conditional formatting can be set to alter the appearance of the gauge's fill color based on whether the values are above, equal to, or below the reference line, thereby providing an intuitive visual representation of performance relative to targets.

The combination of these three parameters enables a highly effective visualization for sales managers to monitor their performance against key metrics and targets directly on their dashboards. This setup is aligned with Salesforce's best practices for creating meaningful and actionable insights within CRM dashboards, ensuring that users can easily interpret and react to the data presented.

For more details on configuring these parameters, you can refer to Salesforce documentation and specific Trailhead modules that cover dashboard creation and customization:

Wave Analytics Explorer

Building Lenses, Dashboards, and Apps in CRM Analytics

These resources provide in-depth training and examples to help users effectively use Salesforce CRM Analytics for a wide range of data visualization needs.

Question: 2

CRM Analytics team plans to enable data sync.

Which limit specific to data sync should the team consider before enabling the feature because it may impact existing jobs?

- A. Maximum number of data sync jobs cannot exceed the limit
- B. Maximum number of Full Sync connection mode enabled
- C. Maximum number of objects that can be enabled for data sync

Answer: C

Explanation:

In CRM Analytics, when planning to enable data sync, one of the critical considerations is the limit on the number of objects that can be enabled for data sync. This limit is essential because it determines how many different Salesforce objects (like Accounts, Opportunities, etc.) can be

synchronized concurrently. Exceeding this limit could impact the performance of existing sync jobs or prevent new sync jobs from being configured.

Key points to consider include:

Performance Impact: Syncing too many objects simultaneously can lead to increased load times and potential delays in data availability, impacting users' ability to access up-to-date information.

Resource Allocation: CRM Analytics allocates resources based on the number of objects being synchronized, and there are practical limits to these resources to ensure stable and efficient operation.

For a more detailed understanding and to manage these limits effectively, Salesforce provides documentation and guidelines within the CRM Analytics resources, which can be further explored in the Trailhead modules specifically focusing on data management and synchronization practices.

Question: 3

A dashboard designer at Cloud Kicks creates a dashboard in CRM Analytics. The designer notices fields display on the dashboard with their API labels, such as "AccountId.Industry", and wants to change this behavior.

The designer also notices that the fields and their order appear to randomly change when a values table is created.

What should the CRM Analytics consultant explain to help the designer?

- A. The default fields in a values table can be changed by reordering how fields appear in the JSON of the value table.
- B. The default fields in a values table and the field labels can be modified in the dataset explorer.
- C. The field labels can only be changed in the widget properties in the dashboard edit mode.

Answer: B

Explanation:

For the scenario at Cloud Kicks where fields display with their API labels and the fields in a values table seem to change order randomly, the correct approach is to modify these settings in the dataset explorer within CRM Analytics. This allows for a more intuitive display and control over how data is presented in dashboards.

Here's how these adjustments help:

Modifying Field Labels: Changing the field labels from their API names to more user-friendly names enhances readability and user experience. This can be done directly in the dataset explorer, which affects how fields appear across all dashboards utilizing that dataset.

Controlling Field Order: The order of fields in a values table can seem random if not explicitly set. By using the dataset explorer, a designer can specify the order in which fields appear, which then reflects consistently in the dashboard's values table.

This functionality is part of CRM Analytics' aim to provide flexible and customizable data visualization tools. Training on these features is available through various Salesforce Trailhead

modules that discuss dashboard and dataset customization techniques, providing practical insights and guided tutorials to enhance dashboard design and user interaction. Both these explanations are consistent with best practices as outlined in Salesforce's CRM Analytics documentation and the Trailhead educational content, ensuring that users are well-equipped to leverage the full capabilities of CRM Analytics for effective data management and presentation.

Question: 4

Universal Containers (UC) is rolling out CRM Analytics to its field sales that include dashboards with order data from an external source.

UC has a well-defined role hierarchy where everyone is assigned to an appropriate node on the hierarchy. In addition, the order data has a reference to a Salesforce opportunity.

An individual sales rep should be able to view all orders that they own or as part of the account team or opportunity team. The sales manager should be able to view all orders for the entire sales team. Similarly, the VP of sales should be able to view orders for everyone who rolls up in that hierarchy.

The dataset has a field called OwnerId which represents the order owner.

Given this information, how should a CRM Analytics consultant implement the above requirements?

- A. As part of the recipe, use a formula on the RoleId field to create an attribute called 'ParentRoleIDs' on the dataset, and apply the following security predicate: 'ParentRoleIDs' == "\$UserRoleid" || Owned \ == '\$User.id\,
- B. As part of the recipe, use the flatten operation on the role hierarchy, create a multi-value attribute called 'ParentRoleIDs' on the dataset, and apply the following security predicate: 'ParentRoleIDs' == "\$User.UserRoleid" || 'TeamMember.Id' '\$User, Id" || 'OwnerId' == "\$User.Id".
- C. As part of the recipe, use a multi row formula on the Roleid field to create an attribute called 'ParentRoleIDs' on the dataset, and apply the following security predicate: "\$User.UserRoleid" || 'OwnerId' == "\$User.Id".

Answer: B

Explanation:

In addressing the requirements of Universal Containers to ensure proper visibility of order data across different levels of the sales hierarchy, the use of a security predicate based on role hierarchies is paramount. Here's why Option B is the ideal approach:

Flatten Operation on Role Hierarchy: This operation is essential as it allows for the creation of a simplified or "flattened" view of the hierarchical relationships within the organization. This flattened view enables the dataset to understand and respect the hierarchical structure in security implementations.

Creating a Multi-value Attribute ('ParentRoleIDs'): By creating this attribute, the recipe can hold multiple role IDs that a particular user has visibility permissions for. This is crucial in a hierarchical organization like UC where data visibility needs to cascade down the hierarchy.

Security Predicate: The predicate ('ParentRoleIDs' == "\$User.UserRoleId" || 'TeamMember.Id' == '\$User.Id' || 'OwnerId' == '\$User.Id") effectively enforces that:

A user can see all orders where their role matches any of the role IDs in the 'ParentRoleIDs' list (hierarchical visibility).

A user can see all orders where they are specifically listed as a team member.

A user can see all orders where they are the owner.

This approach aligns with best practices for implementing row-level security in CRM Analytics, ensuring data visibility is managed correctly according to the defined organizational hierarchy and individual data ownership.

Question: 5

consultant is reviewing a model that is set to maximize the daily sales quantity of consumer products in stores, and they see this recommendation.

The screenshot shows a 'Data Alerts' window with a 'For Review' tab. The main text reads: 'Einstein detected possible issues in your data. Review alerts and address data issues to get better insights, predictions, and improvements. [Learn more](#)'. Below this is a section titled 'High Correlation' with the following text: 'Store explains 35% of the variation in DailyQuantity. Such a high correlation might indicate possible data leakage. Investigate Store to determine whether it contains the information you are trying to predict. If data leakage is found, exclude Store from the story.' At the bottom of this section are two radio button options: 'Exclude Store' and 'Ignore alert'.

Which action should the consultant take?

- A. Verify client expectations that Store is a strong predictor for daily sales quantity.
- B. Remove the Store field from the model definition, because that is the recommended action.
- C. Ignore alert; the explanation of variation is only 35%, which is below 50%,

Answer: A

Explanation:

Upon reviewing the data model and noticing the high correlation alert between 'Store' and daily sales quantity, the appropriate action is to verify with the client their expectations regarding the influence of the Store field on daily sales. Here's the rationale:

Understanding the Role of 'Store' in the Model: Before making any changes to the model, it's crucial to understand whether the 'Store' field is expected to be a strong predictor based on the business context. If the client expects that different stores inherently have different sales

volumes due to factors like location, size, or customer base, this correlation may be both meaningful and desired.

Potential Data Leakage: High correlation warnings can sometimes indicate data leakage, where a predictor (like 'Store') might inadvertently include information about the outcome variable (daily sales quantity). It's essential to verify whether this correlation makes sense logically or if it's skewing the model predictions.

Client Consultation: Consulting with the client helps ensure that any modeling decisions align with their business knowledge and expectations. It's about validating the model against real-world expectations and ensuring it remains a useful tool for decision-making.

By taking these steps, the consultant not only adheres to best practices in data science by validating model inputs and their implications but also ensures that the model aligns with the client's business strategies and operational realities.

Question: 6

Cloud Kicks has informed CRM Analytics developers that they have two scenarios with restricted row-level security.

The parameters being:

1. Non-CXOs and VPs working in EMEA can have access to EMEA records only.
2. CXOs and VPs should have access to all data irrespective of the region (APAC, EMEA, etc.).

Which sharing method works for this scenario?

- A. Create two sets of dashboards; one for EMEA, and one for CXOs and VPs while filtering the dashboard on the region.
- B. Use a field on the user record like Department/Region, and apply row-level security based on that field.
- C. Create two separate datasets; one for EMEA, and one for CXOs and VPs.

Answer: B

Explanation:

For Cloud Kicks' requirements regarding access to data based on roles and geographic regions, the most efficient and scalable approach is to implement row-level security using fields on the user record, like Department or Region. Here's the rationale for choosing this approach:

Scalability and Maintenance: By applying security rules based on user record fields, Cloud Kicks can manage access dynamically without needing to maintain multiple dashboards or datasets. This reduces administrative overhead and simplifies updates as roles or regional structures change.

Flexibility: Using a field on the user record to control access allows for easy expansion or modification of security policies as new regions or roles are added.

Simplicity: This method ensures a clear and straightforward security model that can be easily audited and understood by administrators and compliance teams.

Question: 7

A team of CRM Analytics developers has been working on an existing recipe to add new derived fields. The edited version has been failing ever since, and management is requesting that the dashboard show refreshed data while they work on the edits.

How can the developers add new fields while keeping the dataset refreshed?

- A. A recipe for the new fields and when that is successful, add it to the existing recipe as a join node.
- B. Clone the existing recipe to add fields and roll back the original recipe to the last working version.
- C. Refresh the dataset after working hours to avoid the edited version from failing.

Answer: B

Explanation:

When faced with the need to continue refreshing data while developing new features in a recipe, the best practice is:

Clone the Existing Recipe: By cloning the recipe, developers can experiment with adding new fields and transformations without affecting the production data flow. This allows for testing and development in a sandbox-like environment.

Roll Back to a Stable Version: Rolling back the original recipe to the last stable version ensures that the production dashboards continue to receive refreshed data, maintaining business operations without disruption.

This approach not only ensures data continuity but also provides a safe environment to address any issues that may arise from new developments.

Question: 8

A user is able to access the dashboards, lenses, and datasets of a particular app but is unable to change the name of the specific app.

What is causing the issue?

- A. The user does not have Manager access for that app.
- B. The app name cannot be changed once created.
- C. The user does not have Editor access for that app.

Answer: A

Explanation:

In CRM Analytics, the ability to modify the name of an app or make other significant changes typically requires Manager access. This level of access is distinct from Editor or Viewer

permissions, which may allow for modifications to contents within the app but not to the app's core properties like its name. Here's the reasoning:

Access Restrictions: Manager access is specifically designed to control structural changes within the app, including renaming the app, which is considered a higher privilege operation.

Role-Based Access Control: This ensures that only users with the necessary permissions can make significant changes, protecting the integrity and configuration of the app.

Ensuring users have the appropriate level of access based on their responsibilities is a fundamental aspect of managing security and functionality in CRM Analytics.

Question: 9

Universal Containers (UC) builds three Einstein Discovery models in Salesforce to predict and maximize its revenue per customer. The models are for every region UC has a business: EMEA, AMER, and APAC.

How should a consultant help UC deploy the three Einstein models to Salesforce?

- A. Filter the account data per region and deploy the same model to all segments.
- B. Segment the account data per region and deploy the appropriate model for each segment.
- C. Deploy the same model to all accounts and use an Apex trigger to segment the prediction.

Answer: B

Explanation:

In deploying Einstein Discovery models that are tailored to different regions (EMEA, AMER, and APAC), the best approach is to segment the account data by region and apply the specific model designed for each segment. This method ensures the following:

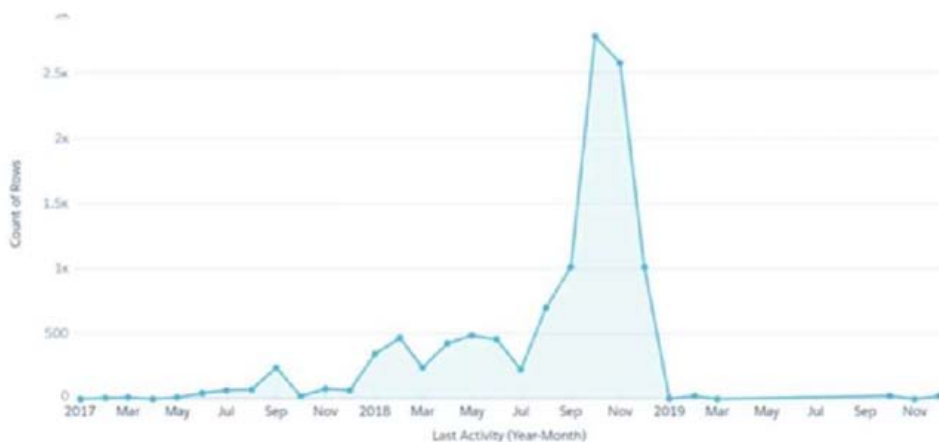
Relevance and Accuracy: Each model can be specialized to understand and predict based on regional dynamics, which may differ significantly across geographies in terms of market behavior, customer preferences, and economic conditions.

Efficiency: Deploying region-specific models avoids the dilution of predictive power that might occur if a single model were used across all regions, which could lead to less accurate predictions.

Scalability: This approach is scalable as UC can further refine each model as more regional data becomes available or as regional market conditions evolve.

Question: 10

A company wants to create a timeline chart to visualize the evolution of its Closed Won opportunities.



What are the required parameters to build a lens that displays output similar to the image shown?

- A. 1 measure, 0 groupings if trellis is disabled, or 0-2 groupings if trellis is enabled
- B. 1 measure, 1-2 groupings if trellis is disabled, or 1-4 groupings if trellis is enabled
- C. 1 measure, 1 grouping by a date field, and either 0-1 groupings groupings by a dimension if trellis is disabled, or 0-2 groupings if trellis is enabled

Answer: C

Explanation:

To create a timeline chart similar to the one shown, the following parameters are typically required:

1 Measure: This could be the count of Closed Won opportunities or any other relevant metric that needs to be tracked over time.

1 Grouping by a Date Field: This is essential to plot the timeline effectively. The date field would typically be the close date of the opportunities.

Additional Groupings: Depending on the complexity and the detail needed, additional groupings can be added. For example, grouping by region or product line can provide more insights into the timeline. If trellis is used, it allows for the creation of multiple smaller charts within the main chart, each representing a slice of data based on the additional groupings.

This setup helps visualize the evolution of Closed Won opportunities over time, making it easy to spot trends, seasonal patterns, or other relevant insights.

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