BUILDING LENSES, DASHBOARDS, AND APPS IN CRM ANALYTICS (ANC201)

OVERVIEW

Get ready to start building in CRM Analytics. In this 1-day instructor-led course, you'll find out how to design and create an effective dashboard layout to help viewers quickly find their way around. You'll learn how to build lenses and add them into your dashboards using the CRM Analytics Dashboard Designer. Once you've created a dashboard, you'll also learn how to optimize the dashboard for mobile and embed CRM Analytics dashboards into home pages and lightning record pages.

WHO SHOULD TAKE THIS COURSE?

This course is designed for CRM Analytics business users who are responsible for building effective lenses and dashboards intended for data analysis. This is also a great course for business users who connect and integrate this data to understand how it's used in the lens and dashboard-building process**.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

• Manage apps and their assets.
• Understand dashboard design guidelines and best practices.
• Build dashboards to meet end-users' needs.
• Embed CRM Analytics dashboards into home pages and Lightning record pages.
• Create mobile layouts for dashboards.

PREWORK

Please complete the following trailmix before attending our expert-led class:

Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class.

CERTIFICATION

ANC201 is recommended to prepare Salesforce Certified Tableau CRM and Einstein Discovery Consultant. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the Exam Guide. Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

• Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor

• We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided

DURATION
1 day

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in English /
Materials in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

Apps and Assets

- Understand Building and Managing Apps
- Manage User Access to Apps

Dashboard Design

- Follow Dashboard Building Basics
- Define Dashboard Widget Types
- Choose between Dashboard Template Options
- Dashboard Design Best Practices

Build a Dashboard

- Construct Dashboards with Chart, Table, Number and Filter Widgets
- Understand and Apply Widget and Query Properties
- Design Dashboard Pages and Navigation

Dashboard Visibility

- Embed a CRM Analytics Dashboard in a Salesforce Home Page
- Embed a CRM Analytics Dashboard in an Account Record Page

Supplemental Materials and Optional Project

- Optimize a browser dashboard for mobile
- Add Additional Widget Properties
- Explore CRM Analytics resources and next steps