

IMPLEMENT AND MANAGE CRM ANALYTICS (ANC301)



OVERVIEW

Take your CRM Analytics skills to the next level. In this 3-day, expert-led class, you'll learn how to develop and implement a CRM Analytics environment that contains both Salesforce and non-Salesforce data. Our team of experts will walk you through CRM Analytics features and settings, user setup, how to load and transform data, data security, and how to modify queries to customize dashboards so you can work more efficiently, spot trends, and predict outcomes faster.

WHO SHOULD TAKE THIS COURSE?

This class is ideal for integration specialists or Salesforce Administrators who want to learn more about connecting and securing data in CRM Analytics. This course is also great for business analysts or developers interested in creating advanced dashboards.

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

- Determine your user, data, and security requirements, to establish a development process.
- Assign users licenses, permission sets, and app permissions to control user access to CRM Analytics
- Load external data to CRM Analytics.
- Implement dataflows to load Salesforce data and join it with data from other datasets.
- Harness Data Sync effectively.
- Define Recipes and Data Prep.
- Employ data security in CRM Analytics
- Override security for implementation and testing.
- Outline how interactions and filters on dashboards function.
- Understand a dashboard's JSON file.
- Adjust a query to meet specific analytic requirements.
- Modify dataset metadata.

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

ANC301 is recommended to prepare Salesforce Certified Tableau CRM & 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
3 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in English /
Materials in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

Discovery and planning

- Meet for Discovery
- Log in
- Establish users and development processes

User Setup and apps

- Define user access on the CRM Analytics platform
- Create CRM Analytics permission sets
- Assign licenses and permission sets to users
- Create and share CRM Analytics apps

Data Connection

- Define Data in CRM Analytics
- Map Data
- Work with CSV files
- Use Data Manager
- Implement Data Sync and Connections
- Schedule
- Generate
- Build Dataflows

Data security

- Determine Security Requirements
- Predicate Filters
- Predicate Filters and Salesforce Data
- Assign Ownership-Based Row-Level Security
- Determine Role-Based Row-Level Security
- Override Security for Implementation and Testing
- Implement Team-Based Row-Level Security
- Design Sharing Inheritance
- Assess Key Considerations
- Apply Sharing Inheritance to a Dataset

Metadata in a Dataset

- Control Dataset Metadata
- Access Salesforce Records with Dataset Actions

Dashboard Builds

- Get To Know the Dashboard
- Build Dashboard Templates
- Understand Dashboard JSON Files
- Build a Dashboard Using a JSON File Template
- Optimize a Dashboard for Mobile
- Create a Mobile Layout

Advanced Dashboards and Interactions

- Optimize a Multi-Dataset Dashboard by Connecting Data Sources
- Create a Dynamic Filter with a Result Interaction
- Adjust a Chart with Custom Queries

Dashboard Query Modification

- Add Derived Measures to Dashboards
- Query Multiple Datasets in One Lens
- Modify Complex Queries with SAQL/SQL
- Evaluate Dashboard Performance with Dashboard Inspector