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## Salesforce Certified CRM Analytics and Einstein Discovery Consultant Sample Questions (Q19-Q24):

### NEW QUESTION # 19

Universal Containers has a single dataset that contains the attainment and commission fields for all sales reps. Each sales rep should be able view the attainment data for each rep in their division. Each rep should only be able to see their own commission data.

Which option should a CRM Analytics consultant use to enforce this requirement?

- A. Create separate datasets for attainment and commission, and apply security Predicates and/or sharing inheritance.
- B. Utilize a single dataset and apply security predicates and/or sharing inheritance.
- C. Add the sales organization to the attainment dataset access list to be able to view commission data.

**Answer: A**

### NEW QUESTION # 20

A CRM Analytics consultant is working on Sales dashboards with multiple datasets and advanced queries in the Sales Analytics app.

Sales managers in the organization have been given Editor/Manager access to the app, whereas sales reps have been given Viewer access.

Some dashboards that are in progress are not ready to be rolled out to sales reps and should only be viewable by sales managers. How should the consultant accomplish this?

- A. Leverage the CRM Analytics asset visibility feature to hide the assets from the users.
- B. Remove the dashboard from the 'Run App' navigation list so the sales reps cannot navigate to these dashboards.
- C. Duplicate the dashboards and their respective datasets, and move the assets to a separate app for the sales rep.

**Answer: A**

Explanation:

In CRM Analytics, you can control the visibility of dashboards and other assets using the asset visibility feature. This allows the consultant to restrict access to specific assets (like dashboards) for certain groups of users, such as sales reps, without needing to duplicate datasets or move dashboards to another app.

This is the most efficient way to manage access for dashboards in progress while allowing only sales managers to view the in-progress dashboards.

### NEW QUESTION # 21

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

**Answer: B**

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.

#### NEW QUESTION # 22

Universal Containers has a dashboard for sales managers. They need the ability to visualize the number of Closed Won opportunities by month, quarter, or year, and then display the result in a single chart. A CRM Analytics consultant creates a custom query to display three values:

ClosedDate\_month, ClosedDate\_quarter, and ClosedDate\_year.

What should the consultant do next?

- A. Use selection binding/interaction to update the grouping in the chart.
- B. Use result binding/interaction to update the grouping in the chart.
- C. Use selection binding/interaction to update the measure in the chart.

**Answer: A**

#### NEW QUESTION # 23

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

**Answer: C**

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.

#### NEW QUESTION # 24

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