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## Salesforce Certified CRM Analytics and Einstein Discovery Consultant Sample Questions (Q114-Q119):

### NEW QUESTION # 114

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 multi row formula on the RoleId field to create an attribute called 'ParentRoleIDs' on the dataset, and apply the following security predicate: '\$User.RoleId' || 'OwnerId' = '\$User.Id'.
- B. 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' || OwnedBy = '\$User.id'.
- C. 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.RoleId' || 'TeamMember.Id' || '\$User.Id' || 'OwnerId' = '\$User.Id'.

### Answer: C

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.RoleId' || '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.

### NEW QUESTION # 115

A CRM Analytics consultant has enabled data sync manually in an org that uses dataflows/recipes. The client says that the dataflow/recipe fails each time it starts running.

What is causing the dataflow/recipe to fail?

- A. Dataflows/recipes with Augment nodes fail until sync has run for the first time.
- B. Dataflows/recipes with computeExpression nodes fail until sync has run for the first time.

- C. Dataflows/recipes with sfcdigest nodes fail until sync has run for the first time.

**Answer: C**

#### NEW QUESTION # 116

A CRM Analytics administrator is working on deploying a dataflow and a dataset (generated by this dataflow) to another org. While creating a change set, they notice that the components are NOT visible to be included in the change set. What is the reason for this?

- A. The administrator does NOT have system administrator permission to include the assets in the change set.
- B. Assets are kept in the Private App and are unavailable to include in the change set.
- C. The administrator does NOT have access to the assets on CRM Analytics.

**Answer: B**

#### NEW QUESTION # 117

Which statement best describes how to ensure CRM Analytics dashboards are easily used across both desktop and mobile devices?

- A. Create multiple layouts, ensure the layout selectors match the device, and resize/hide widgets to ensure the content is appropriate for the device screen size.
- B. Create multiple layouts and allow CRM Analytics to automatically select and organize dashboard contents to be optimal for the device type.
- C. Create multiple layouts and reorder all the widgets so that they fit nicely within the new default width

**Answer: A**

Explanation:

To ensure that CRM Analytics dashboards are optimally usable on both desktop and mobile devices, creating multiple layouts tailored to each device type is crucial. Here's why Option C is the best approach:

\* Device-Specific Layouts: By creating specific layouts for each device type, you ensure that the dashboard contents are presented in a manner best suited to the screen size and interaction model of the device.

\* Layout Selectors: These are used to automatically display the appropriate layout based on the device accessing the dashboard, enhancing user experience without manual intervention.

\* Widget Customization: Resizing or hiding certain widgets for specific device layouts ensures that the dashboard remains clean, uncluttered, and easy to navigate, regardless of the device used.

#### NEW QUESTION # 118

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

**Answer: A**

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.

## NEW QUESTION # 119

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