

IMPLEMENT AND MANAGE TABLEAU CRM (ANC301)



OVERVIEW

Take your Tableau CRM skills to the next level. In this 3-day, expert-led class, you'll learn how to develop and implement a Tableau CRM environment that contains both Salesforce and non-Salesforce data. Our team of experts will walk you through Tableau CRM 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 Tableau CRM. 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, and establish a development process.
- Set up apps and control what users can do in Tableau CRM by assigning them licenses, permission sets, and app permissions.
- Load external data to Tableau CRM.
- Create and run dataflows to load Salesforce data, and join it with data from other datasets.
- Understand and use Data Sync effectively.
- Understand Recipes and Data Prep.
- Understand and implement data security in Tableau CRM, and override security for implementation and testing.
- Understand how filters on dashboards function and be able to use interactions when necessary.
- Understand a dashboard's JSON file.
- Explain the process of dashboard queries and modify 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](#)

CERTIFICATION

ANC301 is recommended to prepare Salesforce Certified Einstein Analytics and 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](#).

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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

- Discovery Meeting
- Establishing Your Users and Development Process

Set Up Users and Apps

- Overview of User Access on the Tableau CRM Platform
- Creating Tableau CRM Permission Sets
- Assigning Licenses and Permission Sets to Users
- Creating and Sharing Tableau CRM Apps

Connect Data

- Overview of Connecting Data
- Data Mapping
- Overview of the Dataflow Process
- Designing a Dataflow
- Loading External CSV Data
- Creating Dataflows
- Optimizing Dataflows
- Running, Monitoring, and Scheduling a Dataflow
- Preparing Datasets with Recipes with Data Prep
- Data Connectors
- Additional Transformations

Data Security

- Overview of Security in Tableau CRM
- Determining Security Requirements
- Overview of Using Predicate Filters
- Implementing Ownership-Based Row-Level Security
- Implementing Role-Based Row-Level Security
- Implementing Team-Based Row-Level Security
- Overriding Security for Implementation and Testing
- Sharing Inheritance

Extended Metadata in a Dataset

- Overview of Extended Metadata (XMD)
- Updating Field Metadata
- Adding Quick Action Menus for Records in Tableau CRM

Dashboard Templates and Mobile Dashboards

- Overview of Tableau CRM Dashboard Templates
- Overview of JSON for Dashboards
- Building a Dashboard Using a Template
- Optimizing Dashboards for a Mobile Device

Bindings in Dashboards

- Understanding Filters in Lenses and Dashboards
- Multi-Dataset Dashboards
- Filters with Interactions
- Custom Queries

Query Modification

- Overview of Modifying Queries
- Maximizing the Use of the Compare Table
- Salesforce Analytics Query Language (SAQL)
- SAQL Queries in a Tableau CRM Dashboard