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, and establish a development process.
- Set up apps and control what users can do in CRM Analytics by assigning them licenses, permission sets, and app permissions.
- Load external data to CRM Analytics.
- 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 CRM Analytics, 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

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

IMPLEMENT AND MANAGE CRM ANALYTICS (ANC301)

LESSONS & TOPICS

Discovery and planning
- Discovery meeting
- Establishing your users and development process

Set up users and apps
- Overview of user access on the CRM Analytics platform
- Creating CRM Analytics permission sets
- Assigning licenses and permission sets to users
- Creating and sharing CRM Analytics 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 CRM Analytics
- 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 CRM Analytics

Dashboard templates and mobile dashboards
- Overview of CRM Analytics 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 CRM Analytics dashboard

Learn the Foundations of AI
Trailhead Academy classes include a lesson where you'll learn AI concepts, responsible AI practices, and how to use AI and Salesforce together to drive productivity.

EI-INSTITUT – Training Center of Cognizant Technology Solutions France SAS
Tour Ariane, 5 Place de la Pyramide, 92800 Puteaux – Tel. : +33(0)1 70 36 56 57
www.ei-technologies.com/en/training – Mail : institut@cognizant.com