

BUILDING LENSES, DASHBOARDS, AND APPS IN CRM ANALYTICS (ANC201)



OVERVIEW

Ready to start building in CRM Analytics? In this course, you'll find out how to design and create an effective dashboard layout to help viewers quickly find their way around. You'll learn how to build lenses and add them into your dashboards using the CRM Analytics Dashboard Designer. Once you've created a dashboard, you'll also learn how to optimize the dashboard for mobile. Finally, you'll also learn how to organize your lenses and dashboards using apps and ensure that only the right users have access to them.

WHO SHOULD TAKE THIS COURSE?

This course is aimed at users with the CRM Analytics license who need to build effective lenses and dashboards for their business users to explore their data. It may also be of interest to users who are connecting and integrating this data, to understand how it is used in the lens and dashboard building process.

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

- Build and manage apps in CRM Analytics
- Design a dashboard based on requirements, and create a dashboard template
- Create and add lenses to build a dashboard
- Optimize a dashboard for mobile use.

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

ANC201 is recommended to prepare Salesforce Certified Tableau CRM and 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
1 day

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

Understanding Apps and Assets

- Overview of Building and Managing Apps
- Managing User Access to Apps

Dashboard Design

- Dashboard Building Basics
- Dashboard Widget Types
- Dashboard Template Options and Design
- Dashboard Design Best Practices

Dashboard Building

- Construct Dashboards with Chart, Table, Number and Filter Widgets
- Understand and Apply Widget and Query Properties
- Dashboard Pages and Navigation

Extending Dashboard Visibility

- Embed a CRM Analytics Dashboard in a Salesforce Home Page
- Embed a CRM Analytics Dashboard in an Account Record Page

Supplemental Materials and Optional Project

- Optimize a browser dashboard for a mobile device
- Additional Widget Properties
- Explore CRM Analytics resources and next steps

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.