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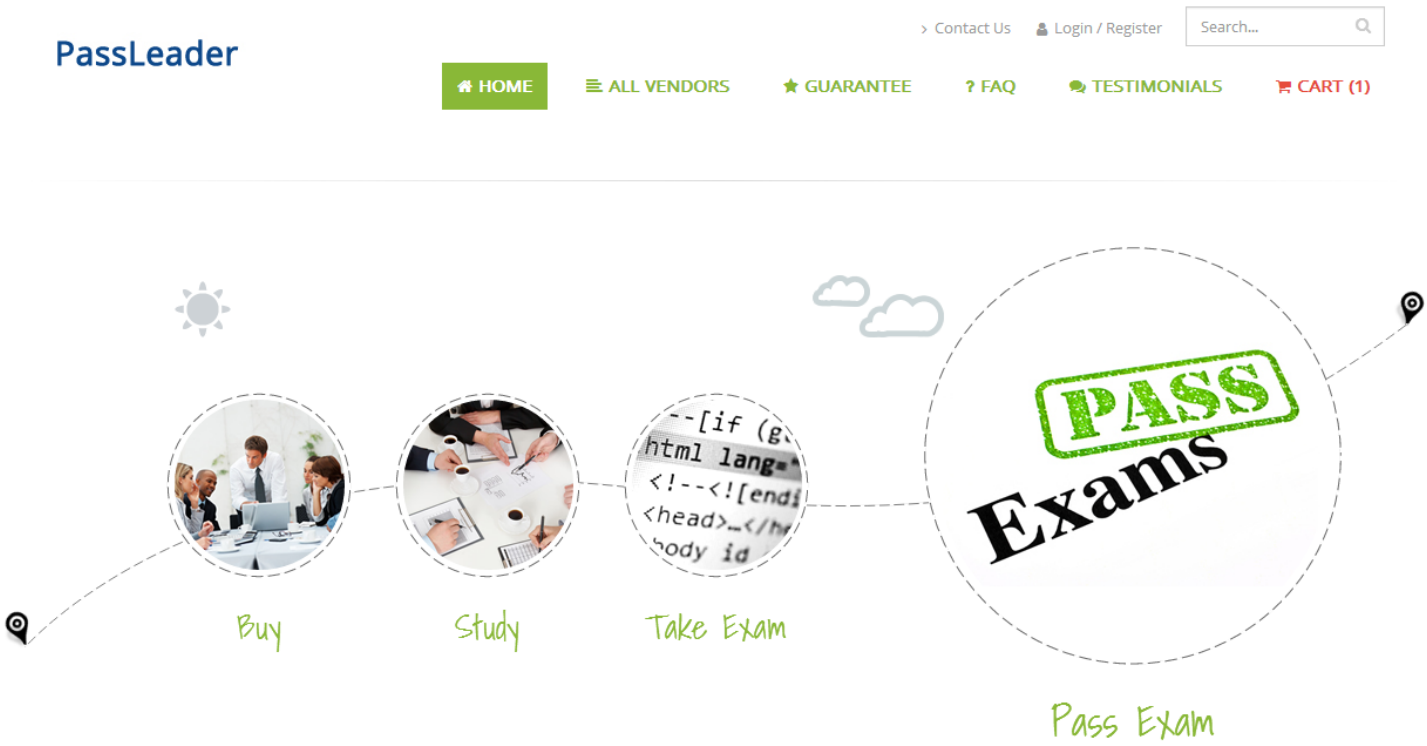

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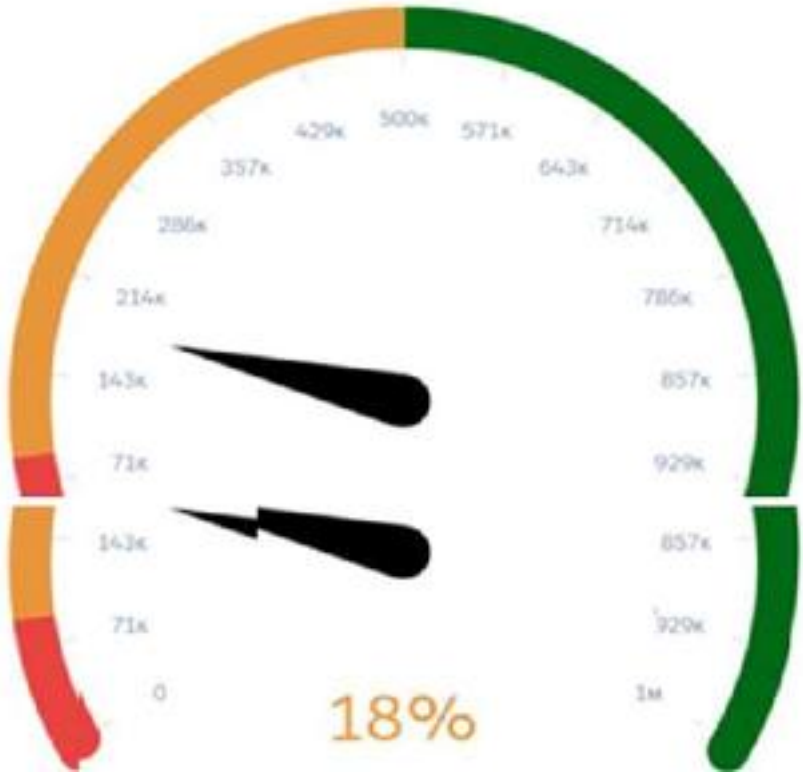
Exam : **ANC-301**

Title : Implement and Manage Tableau CRM

Vendor : Salesforce

Version : DEMO

NO.1 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, Angle, Range Values

C. Reference Line, Markers, Conditional Formatting

Answer: C

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.

NO.2 What is a benefit of introducing a second local connector?

A. Better maintenance by having a connector per recipe

B. Better deployment management between sandboxes and production environment

C. Better performance by syncing data according to the refresh necessities

Answer: C

Explanation:
Introducing a second local connector in CRM Analytics can improve performance by enabling more granular control over data syncs. By having a separate connector, different datasets or recipes can be synchronized independently based on specific refresh needs, reducing load and improving overall performance. This approach helps optimize data flow operations, especially in large-scale deployments with varying data refresh requirements.

NO.3 Universal Containers' CRM Analytics team is building a dashboard with two widgets.
1. List widget associated to the query "Type_2" and grouped by the dimension "Type" (multi-selection)
2. Donut chart widget associated to the query "Step_pie_3" and grouped by the dimension "Type"
The team wants to use bindings/interactions so any selection in the List widget will filter the Donut chart. The queries use different datasets, and users should be able to choose more than one Type (multi-selection).
What is the right syntax for the binding/interaction?

A.

```
"filters": [ [ "Type", "{{column(Type_2.selection, [\"Type\"]).asString()}}" ] ]
```

B.

```
"filters": [ [ "Type", "{{cell(Step_pie_3.selection, 0, \"Type\").asObject()}}" ] ]
```

C.

```
"filters": [ [ "Type", "{{column(Type_2.selection, [\"Type\"]).asObject()}}" ] ]
```

Answer: A

Explanation:
For the given requirement where a selection in a list widget needs to filter data displayed on a donut chart, and considering the list allows for multi-selection of the 'Type', the correct binding/interaction would be to use a syntax that captures the multi-select aspect and passes it appropriately. The right syntax, as indicated in Option A, looks like this:
"{{column(Type_2.selection, [\"Type\"]).asObject()}}"
This syntax ensures:
Multi-selection: The column() function in combination with .asObject() ensures that multiple selected values from the 'Type_2' query can be passed as an object, which the donut chart can utilize to filter

its content.
Correct Data Type Handling: By using .asObject(), the binding ensures the data passed between widgets maintains the correct structure expected by the CRM Analytics dashboard, thereby ensuring accurate filtering.

NO.4 A CRM Analytics consultant is asked to make changes to the current sales dashboard at Cloud Kicks. The dashboard is crucial to track the daily sales performance of the company and needs to be available for other users while the consultant works on the changes.
How should the consultant proceed to update the dashboard?
A. Wait for a period of least usability or the dashboard to edit it.
B. Self assign as a dashboard publisher and make the changes to the dashboard in draft mode while maintaining a previous version live.
C. Clone the dashboard to a new one, apply the changes, share the new dashboard with the users, and delete the old one.
Answer: B

NO.5 Which capability can a consultant use if "Deploy without connecting to a Salesforce Object" is selected while deploying the model?

A. Einstein Predictions Component score
B. Predict Function in Salesforce flows
C. No-Code Writeback to SFDC objects
Answer: B
Explanation:
When deploying a model with the option "Deploy without connecting to a Salesforce Object", the suitable capabilities include:
Use of Predict Function in Salesforce Flows: This capability allows the deployed model to be used within Salesforce Flow as a predictive tool, enabling automation flows to include predictions without directly writing back to Salesforce objects.
Flexibility in Application: This method provides flexibility in how predictions are utilized across various Salesforce processes and workflows, without the need for direct data manipulation within Salesforce objects.
Enhanced Workflow Integration: By integrating predictive insights directly into flows, organizations can automate decision-making processes, enhance user interactions, and streamline operations based on predictive outcomes.
This setup aligns with Salesforce's best practices for leveraging CRM Analytics to enhance operational efficiency and decision accuracy across different business functions.

NO.6 What is the purpose of the CRM Analytics Dashboard Inspector?

A. To view the total time required to run all queries.
B. To automatically remove bottlenecks to make queries run faster.
C. To see the final query for each widget along with the results.
Answer: C
Explanation:
The CRM Analytics Dashboard Inspector is a powerful tool used to troubleshoot and optimize dashboards. Its primary function is to display the underlying SAQL (Salesforce Analytics Query Language) query executed for each widget. It helps users see the final query that is run and the corresponding results. This feature allows CRM Analytics consultants and developers to diagnose issues, optimize performance, and understand how data is being processed in the dashboard.
While the Inspector helps view execution times and identify bottlenecks, it does not automatically resolve performance issues (which is why option B is incorrect). It simply provides visibility into query performance and execution details, allowing the user to make manual optimizations.

NO.7 A system administrator at Cloud Kicks creates a joined report to showcase the new business deals closing in the current quarter, which was well received by the business stakeholders. A manager wants to visualize this report on CRM Analytics.
The CRM Analytics consultant determines the report can be trended on CRM Analytics, but it's not working as expected.
What is causing the issue?
A. Trending dashboards cannot be created from joined reports.
B. The Salesforce report was filtered on quarterly data which meant it did not have enough data to trend on CRM Analytics.
C. The Analytics Integration user did not have permission to view the report on Salesforce.
Answer: A

NO.8 A consultant is building a CRM Analytics dashboard for Universal Containers. The consultant has enabled data sync to increase the speed of datasets refreshing.
How often will the data on the dashboard be refreshed?
A. When dataflow/recipe runs to completion, and then data syne runs to completion
B. When the dashboard viewer clicks the Refresh button
C. When data sync runs to completion, and then dataflow/recipe runs to completion
Answer: C

NO.9 Exhibit.

Account Type	Total Accounts This Year	Total Accounts Last Year	YoY Growth
Customer	5,296	4,238	24.96%
Prospect	1	0	-
Wholesaler	2	2	0%

Universal Containers has a dashboard for sales managers to visualize the Year Over Year (YoY) growth

of their customers. The formula used is:
YoY = [(This Year - Last Year) / Last Year] %
Based on the graphic, when there is not an account in the Last Year column, the YoY Growth shows null results. The sales managers want to replace it with 100% value.
What is the correct function to use?
A. substr()
B. coalesce()
C. replace()
Answer: B

NO.10 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. Remove the dashboard from the 'Run App' navigation list so the sales reps cannot navigate to these dashboards.
B. Duplicate the dashboards and their respective datasets, and move the assets to a separate app for the sales rep.
C. Leverage the CRM Analytics asset visibility feature to hide the assets from the users.
Answer: C
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.

NO.11 A consultant creates a CRM Analytics dashboard in a sandbox and it needs to be migrated into production.
What should the consultant use to complete the migration?
A. Analytics dashboard connector
B. Change sets
C. Analytics External Data API
Answer: B

NO.12 Universal Containers (UC) is looking to create a dashboard for whitespace analysis. UC wants to view a particular customer and see what similar customers have bought.
Which recipe transformation is helpful for the consultant to use while creating the dataset?
A. Timeseries Forecasting
B. Cluster
C. Predict Missing Values

Answer: B

Explanation:

Cluster transformation is a powerful tool in CRM Analytics recipes used for grouping similar records together based on shared attributes. In this scenario, Universal Containers (UC) wants to perform whitespace analysis by viewing a particular customer and comparing their purchase history with similar customers. The Cluster transformation would help in identifying groups of customers who have made similar purchases. This can then be used to provide insights into what the viewed customer might also be interested in purchasing, based on similar customer behaviors.

Reference: CRM Analytics Recipes and Transformation