



Salesforce

Analytics-Con-201 Exam

Salesforce Certified CRM Analytics and Einstein Discovery Consultant

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Question 1. (Single Select)

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

Correct 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.

Question 2. (Single Select)

Cloud Kicks has informed CRM Analytics developers that they have two scenarios with restricted row-level security.

The parameters being:

1. Non-CXOs and VPs working in EMEA can have access to EMEA records only.
2. CXOs and VPs should have access to all data irrespective of the region (APAC, EMEA, etc.).

Which sharing method works for this scenario?

A: Create two sets of dashboards; one for EMEA, and one for CXOs and VPs while filtering the dashboard on the region.

B: Use a field on the user record like Department/Region, and apply row-level security based on that field.

C: Create two separate datasets; one for EMEA, and one for CXOs and VPs.

Correct Answer: B

Explanation:

For Cloud Kicks' requirements regarding access to data based on roles and geographic regions, the most efficient and scalable approach is to implement row-level security using fields on the user record, like Department or Region. Here's the rationale for choosing this approach:

Scalability and Maintenance: By applying security rules based on user record fields, Cloud Kicks can manage access dynamically without needing to maintain multiple dashboards or datasets. This reduces administrative overhead and simplifies updates as roles or regional structures change.

Flexibility: Using a field on the user record to control access allows for easy expansion or modification of security policies as new regions or roles are added.

Simplicity: This method ensures a clear and straightforward security model that can be easily audited and understood by administrators and compliance teams.

Question 3. (Single Select)

A team of CRM Analytics developers has been working on an existing recipe to add new derived fields. The edited version has been failing ever since, and management is requesting that the dashboard show refreshed data while they work on the edits.

How can the developers add new fields while keeping the dataset refreshed?

A: A recipe for the new fields and when that is successful, add it to the existing recipe as a join node.

B: Clone the existing recipe to add fields and roll back the original recipe to the last working version.

C: Refresh the dataset after working hours to avoid the edited version from failing.

Correct Answer: B

Explanation:

When faced with the need to continue refreshing data while developing new features in a recipe, the best practice is:

Clone the Existing Recipe: By cloning the recipe, developers can experiment with adding new fields and transformations without affecting the production data flow. This allows for testing and development in a sandbox-like environment.

Roll Back to a Stable Version: Rolling back the original recipe to the last stable version ensures that the production dashboards continue to receive refreshed data, maintaining business operations without disruption.

This approach not only ensures data continuity but also provides a safe environment to address any issues that may arise from new developments.

Question 4. (Single Select)

A user is able to access the dashboards, lenses, and datasets of a particular app but is unable to change the name of the specific app.

What is causing the issue?

A: The user does not have Manager access for that app.

B: The app name cannot be changed once created.

C: The user does not have Editor access for that app.

Correct Answer: A

Explanation:

In CRM Analytics, the ability to modify the name of an app or make other significant changes typically requires Manager access. This level of access is distinct from Editor or Viewer permissions, which may allow for modifications to contents within the app but not to the app's core properties like its name. Here's the reasoning:

Access Restrictions: Manager access is specifically designed to control structural changes within the app, including renaming the app, which is considered a higher privilege operation.

Role-Based Access Control: This ensures that only users with the necessary permissions can make significant changes, protecting the integrity and configuration of the app.

Ensuring users have the appropriate level of access based on their responsibilities is a fundamental aspect of managing security and functionality in CRM Analytics.

Question 5. (Single Select)

Universal Containers (UC) builds three Einstein Discovery models in Salesforce to predict and maximize its revenue per customer. The models are for every region UC has a business: EMEA, AMER, and APAC.

How should a consultant help UC deploy the three Einstein models to Salesforce?

A: Filter the account data per region and deploy the same model to all segments.

B: Segment the account data per region and deploy the appropriate model for each segment.

C: Deploy the same model to all accounts and use an Apex trigger to segment the prediction.

Correct Answer: B

Explanation:

In deploying Einstein Discovery models that are tailored to different regions (EMEA, AMER, and APAC), the best approach is to segment the account data by region and apply the specific model designed for each segment. This method ensures the following:

Relevance and Accuracy: Each model can be specialized to understand and predict based on regional dynamics, which may differ significantly across geographies in terms of market behavior, customer preferences, and economic conditions.

Efficiency: Deploying region-specific models avoids the dilution of predictive power that might occur if a single model were used across all regions, which could lead to less accurate predictions.

Scalability: This approach is scalable as UC can further refine each model as more regional data becomes available or as regional market conditions evolve.



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