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Salesforce CRM-Analytics-and-Einstein-Discovery-Consultant

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Topic Break Down

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QUESTION NO: 1

Universal Containers builds a new sales dashboard and wants to make sure account managers can access the dashboard while traveling.

What should the consultant consider doing in this process?

- A. Set the optimal Dashboard width for the Phone layout to get a more accurate preview.
- B. Make sure the dashboard automatically is optimized for mobile viewing.
- C. Enable mobile optimization in the analytics settings under Setup.

ANSWER: A

Explanation:

Set the optimal Dashboard width for the Phone layout to get a more accurate preview. CRM Analytics dashboards can be designed with device-specific layouts, including a Phone layout, so that account managers have a usable experience when they open the dashboard in the Salesforce mobile app while traveling. The dashboard designer's phone preview is based on the configured dashboard width; therefore, choosing a width that reflects the target phones helps the consultant accurately assess component sizing, spacing, and the amount of content visible without excessive scrolling. This is especially important for a sales dashboard, where key metrics, charts, and filters should remain legible and easy to interact with on a smaller screen. The consultant should use the Phone layout and preview it at an appropriate width as part of dashboard design, rather than assuming that a desktop arrangement will translate well to mobile devices. Salesforce documents dashboard layouts and device-specific design considerations in [CRM Analytics Dashboard Layouts](#). For guidance on creating and refining CRM Analytics dashboards, see the [CRM Analytics Dashboards Trailhead module](#).

QUESTION NO: 2

The CRM Analytics consultant at Universal Containers notices that some users have access to sensitive data and dashboards they should not have access to in the Manager 's app.

How should the consultant fix the problem?

- A. Develop separate dashboards and datasets and put them in the Manager 's app.
- B. Apply data encryption using Salesforce Shield.
- C. Create separate apps, datasets, and dashboards, and share them with the proper users.

ANSWER: C

Explanation:

Create separate apps, datasets, and dashboards, and share them with the proper users. CRM Analytics app sharing is designed to control who can open an app and use the analytics assets it contains. By organizing sensitive Manager content into separate apps and assigning access only to the appropriate users, groups, or roles, the consultant establishes clear security boundaries for dashboards and related datasets. Each audience can then receive access only to the app containing the data and dashboards it is authorized to view.

This approach supports least-privilege access and is easier to maintain as dashboard audiences change. It also ensures that a dashboard is not merely hidden from users; rather, the underlying analytics content is organized and shared according to the intended audience. Dataset access should be aligned with the app-sharing design so that users who are granted an app can query only the data appropriate for their responsibilities. Salesforce documents CRM Analytics sharing and security concepts, including controlling access to apps and their content, in its [CRM Analytics Security Trailhead module](#).

QUESTION NO: 3

Universal Containers has a single dataset that contains the attainment and commission fields for all sales reps. Each sales rep should be able to view the attainment data for each rep in their division. Each rep should only be able to see their own commission data.

Which option should a CRM Analytics consultant use to enforce this requirement?

- A. Utilize a single dataset and apply security predicates and/or sharing inheritance.
- B. Create separate datasets for attainment and commission, and apply security Predicates and/or sharing inheritance.
- C. Add the sales organization to the attainment dataset access list to be able to view commission data.

ANSWER: B

Explanation:

Create separate datasets for attainment and commission, and apply security Predicates and/or sharing inheritance. CRM Analytics dataset security operates at the row level: a security predicate determines which dataset rows a user can query. It does not provide field-level security that could expose the attainment field for every person in a division while simultaneously hiding the commission field for those same rows unless the viewer is the individual sales rep. Because both measures are in one row of the original dataset, granting a rep access to colleagues' attainment rows would also expose the commission values in those rows.

Splitting the information creates independently securable data assets. The attainment dataset can use a predicate based on division, allowing each rep to query attainment records for their division. The commission dataset can use a predicate keyed to the current user, such as a user identifier or email mapped to the rep, so each person receives only their own commission record. Where appropriate, sharing inheritance can align dataset access with Salesforce record access, but predicates remain the mechanism for enforcing the differing row populations. This design follows CRM Analytics security guidance that dataset access and row-level security must be configured according to the data each audience is permitted to query. See Salesforce's [CRM Analytics security documentation](#) and [CRM Analytics security Trailhead module](#).

QUESTION NO: 4

A consultant sets up a Sales Analytics templated app that is very useful for sales operations at Universal Containers (UC). UC wants to make sure all of the data assets associated with the app, including:

recipes, dataflows, connectors, Einstein Discovery models, and prediction definitions are refreshed every day at 6:00 AM EST.

How should the consultant proceed?

- A. Use the Data Manager and schedule each item to run at 6:00 AM EST based on 'Time-based Scheduling'.
- B. Use the Data Manager and schedule the recipes/dataflows to run at 6:00 AM EST based on 'Time-based Scheduling'.
- C. Use the App Install History under Analytics Settings and schedule the app to run at 6:00 AM EST.

ANSWER: C

Explanation:

Use the App Install History under Analytics Settings and schedule the app to run at 6:00 AM EST. A templated CRM Analytics app is installed as a managed collection of related assets, not merely as an individual recipe or dataflow. The app's update schedule is designed to refresh the installed app as a unit, coordinating the app's underlying data preparation and dependent analytics assets. This is especially important when the app includes connectors, recipes, dataflows, Einstein Discovery models, and prediction definitions, because dependencies must be refreshed in the appropriate order for the app to use current data consistently.

From Analytics Settings, App Install History provides access to the installed template app and its update scheduling controls. Configuring a daily scheduled app update at 6:00 AM in the organization's applicable time zone gives UC one central schedule for the app lifecycle rather than requiring separate, potentially conflicting schedules for individual components. Salesforce describes CRM Analytics template apps and their installation/update lifecycle in its [CRM Analytics Template Apps](#)

[documentation](#). For foundational details on working with CRM Analytics apps and data refreshes, see the [CRM Analytics App Basics Trailhead module](#).

QUESTION NO: 5

CRM Analytics team is asked to build a Service Analytics dashboard for the service agents.

What are the main "Deep Design Thinking" principles the team should keep in mind during the discovery sessions?

- A. Purpose - Structure - Surface
- B. Priority - Logic - Level of Granularity
- C. Clarity - Efficiency - Consistency

ANSWER: A

Explanation:

Purpose - Structure - Surface is correct because Salesforce's dashboard-design approach uses these three layers to move from business need to a usable analytical experience. Purpose establishes the decision or action that service agents must support, such as prioritizing work, monitoring case health, or identifying blockers. Discovery should therefore clarify the audience, their workflow, the questions they need answered, and the outcomes they can influence. Structure then organizes the information into a meaningful hierarchy, ensuring the most important metrics, comparisons, and paths to detail support that purpose without overwhelming the agent. Surface addresses the presentation layer: appropriate charts, labels, visual emphasis, interactions, and layout make the structured information easy to scan and act on during daily service work. Applying the layers in this order helps the team avoid beginning with attractive visualizations before confirming the operational questions the dashboard must answer. It also keeps the design centered on agent decisions rather than simply exposing available data. Salesforce CRM Analytics provides interactive dashboards and lenses to explore business data, while effective dashboard design aligns those capabilities to users' jobs and actions. See Salesforce's [CRM Analytics overview](#) and [dashboard design guidance](#).

QUESTION NO: 6

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.

ANSWER: B

Explanation:

Segment the account data per region and deploy the appropriate model for each segment. UC has created separate models because the factors that influence revenue can differ by geography, such as customer mix, sales practices, product availability, pricing, and local market conditions. The deployment should therefore route each account to the model trained for its applicable regional population. This preserves the intended scope of each model and ensures that the prediction and improvement recommendations shown on a record are generated from the regional model that best represents that account's data.

In Einstein Discovery, a deployment can use segments to apply different models according to record criteria. For UC, the region field is the natural segmentation criterion: EMEA accounts are evaluated by the EMEA model, AMER accounts by the AMER model, and APAC accounts by the APAC model. The consultant should also ensure that the segment criteria are mutually appropriate and that every account population requiring a prediction is covered. This approach supports

maintainability because each regional model can be monitored, retrained, and redeployed independently as its regional data and business conditions evolve. See Salesforce's [Einstein Discovery Basics](#) and [Einstein Discovery deployment documentation](#).

QUESTION NO: 7

A company wants to create a timeline chart to visualize the evolution of its Closed Won opportunities.



What are the required parameters to build a lens that displays output similar to the image shown?

- A. 1 measure, 0 groupings if trellis is disabled, or 0-2 groupings if trellis is enabled
- B. 1 measure, 1-2 groupings if trellis is disabled, or 1-4 groupings if trellis is enabled
- C. 1 measure, 1 grouping by a date field, and either 0-1 groupings by a dimension if trellis is disabled, or 0-2 groupings if trellis is enabled

ANSWER: C

Explanation:

1 measure, 1 grouping by a date field, and either 0-1 groupings by a dimension if trellis is disabled, or 0-2 groupings if trellis is enabled is correct because a CRM Analytics timeline visualization requires a quantitative measure plotted across time. For Closed Won opportunities, the measure can be opportunity count, sum of Amount, or another aggregated value that represents performance. The mandatory date grouping provides the chronological axis and lets CRM Analytics bucket results into periods such as months, quarters, or years based on a date field such as Close Date.

A dimension grouping is optional because a timeline can show the overall trend without segmenting it further. When included, the dimension can split the series by a business attribute such as owner, region, or product. Trellising expands the supported grouping capacity because it creates separate chart panels for dimension values while retaining the date-based timeline in each panel. This combination produces the time-evolution view required for examining Closed Won performance and supports the layout shown. Salesforce documents the configuration and behavior of CRM Analytics chart visualizations in its [chart types documentation](#) and provides chart-building guidance in [CRM Analytics dashboards learning content](#).

QUESTION NO: 8

A CRM Analytics consultant is building a dashboard for Cloud Kicks that is embedded in a separate Lightning page called "Management Dashboard" using a CRM Analytics Dashboard Component. The system administrator and the contract manager should both have access. The system administrator is able to see the dashboard and the data, but the contract manager sees a blank Lightning page.

What is causing the issue?

- A. The consultant has set up component visibility for the dashboard for system administrators only.
- B. The consultant has set up a dashboard filter condition for data to be visible to system administrators only.
- C. The consultant has set up/enabled a 'Hide on Error' feature for the dashboard while embedding it.

ANSWER: A

Explanation:

The consultant has set up component visibility for the dashboard for system administrators only. In Lightning App Builder, component visibility can be controlled with visibility filters, including filters based on the viewing user's profile, permission, or other attributes. When a user does not satisfy a component's visibility criteria, Salesforce does not render that component on the Lightning page. If the CRM Analytics Dashboard Component is the only meaningful component on the Management Dashboard page, the contract manager experiences this as a blank page, while the system administrator—whose user context meets the visibility filter—can see the embedded dashboard and its data.

This behavior occurs at the Lightning page-component layer, before the user can interact with the embedded CRM Analytics dashboard. The consultant should review the Dashboard Component's visibility settings in Lightning App Builder and ensure that the contract manager's profile or an appropriate permission-based audience is included. Salesforce recommends using permissions where practical so access remains manageable as users and roles change. See Salesforce's guidance on [component visibility rules](#) and the Trailhead material on [customizing Lightning record pages](#).

QUESTION NO: 9

A consultant is tasked with creating a dataset and a dashboard for a sales team. During the requirements gathering, it was highlighted that security of the data is important.

It was noted that the Opportunity object has organization-wide defaults set to Private with access via the role hierarchy. Sales wants to keep this security in place for the dashboard. Looking at the Opportunity data, the consultant sees that the VP of sales can have access to up to 20,000 records and is unsure if sharing inheritance can be used.

Which approach ensures data security for the new Opportunity dataset?

- A. Enable Inherit Sharing from Salesforce in the analytics settings and set Opportunity as the source on the dataset.
- B. Flatten the role hierarchy in the dataflow recipe and set a security predicate based on Opportunity owner and role path.
- C. Run the Sharing Inheritance Coverage Assessment for the Opportunity object in the analytics settings.

ANSWER: C

Explanation:

Run the Sharing Inheritance Coverage Assessment for the Opportunity object in the analytics settings. This assessment is the appropriate first step when the organization wants CRM Analytics to respect existing Salesforce record sharing, including private organization-wide defaults and access granted through the role hierarchy. Sharing inheritance evaluates whether CRM Analytics can safely and completely apply Salesforce sharing for the selected object and identifies the resulting coverage for users.

The VP of Sales potentially seeing 20,000 Opportunity records is significant because sharing inheritance has coverage and scale considerations. Rather than assuming that inherited sharing will work for every user, the assessment provides the information needed to determine whether the dataset can use Salesforce sharing inheritance as intended or whether a different supported security design is required for uncovered access. This allows the consultant to preserve the organization's record-security intent before exposing Opportunity data in dashboards.

Salesforce documents sharing inheritance as a way to apply Salesforce sharing access to CRM Analytics data and provides assessment tooling to evaluate sharing-inheritance coverage. See [Salesforce Help: Inherit Sharing from Salesforce](#) and [Trailhead: Get Started with CRM Analytics Security](#).

QUESTION NO: 10

Universal Containers uses a dataflow to prepare Opportunity data for a pipeline dashboard. The dashboard must show the Account Industry for each Opportunity, but Industry exists only on the Account object.

Which dataflow transformation should the consultant use?

- A. Use a compute expression to derive Account Industry.
- B. Use an augment transformation to join Opportunity data with Account data.
- C. Use a cogroup transformation to combine the Opportunity and Account streams.
- D. Use a register transformation to add Account Industry to the Opportunity stream.

ANSWER: B

Explanation:

Use an augment transformation to join Opportunity data with Account data. An augment node enriches one stream with fields from another stream by matching related keys, such as `Opportunity.AccountId` to `Account.Id`. This allows the dataflow to add Account Industry to each Opportunity row before the output dataset is created.

A compute expression can derive a value only from fields already available in the stream. A cogroup operation is used to combine aggregated streams for analysis and is not the appropriate transformation for adding lookup fields to detailed Opportunity records. Registering a stream writes the completed dataflow output as a dataset but does not enrich it.

QUESTION NO: 11

A client has two datasets that are used across seven different dashboards. Three of these dashboards are used by marketing and four are used by sales. The client requires that only marketing can

access the marketing dashboards and only sales can access the sales dashboards.

Which solution should a consultant recommend?

- A. Create three custom apps: one for marketing dashboards with marketing as "viewer", one for sales dashboards with sales as "viewer", and one for datasets where marketing and sales are "viewer".
- B. Duplicate the datasets and create two custom apps: one for marketing dashboards and datasets with marketing as "editor" and one for sales dashboards and datasets with sales as "editor".
- C. Use two custom apps: one for marketing dashboards with marketing as "viewer" and one for sales dashboards with sales as "viewer". Add the datasets as references to both custom apps.

ANSWER: C

Explanation:

Use two custom apps: one for marketing dashboards with marketing as "viewer" and one for sales dashboards with sales as "viewer". Add the datasets as references to both custom apps. This design applies access control at the app and dashboard-consumption level while allowing the same underlying datasets to support content for both business groups. The marketing app can contain only the marketing dashboards and grant the marketing audience Viewer access; likewise, the sales app can contain only the sales dashboards and grant the sales audience Viewer access. A user's access to an app determines whether that user can open and consume the dashboards contained in that app.

Adding the existing datasets as references avoids unnecessary duplication and ensures both dashboard collections continue to use a single, governed source of data. Dataset security must still permit the intended users to query the data used by their dashboards; where appropriate, CRM Analytics security predicates can further limit the rows returned for each audience. This approach is maintainable because dataset refreshes, recipes, and data preparation remain centralized, while app membership cleanly separates the dashboard experiences delivered to marketing and sales. Salesforce describes app

sharing and roles in its [CRM Analytics app-sharing documentation](#) and explains data-access controls in the [CRM Analytics Security Basics](#) Trailhead module.

QUESTION NO: 12

Cloud Kicks is building a remote partner portal that retrieves CRM Analytics query results through the Analytics REST API. Partners belong to different regions, and the dataset has a security predicate that restricts users to their assigned region.

The consultant must ensure that each partner receives only the rows allowed by that partner's dataset security.

Which integration approach should the consultant recommend?

- A. Use OAuth to execute each query in the authenticated partner's user context.
- B. Use one shared integration user and apply region filtering in the portal.
- C. Export the full dataset nightly and distribute a separate CSV file to each partner.

ANSWER: A

Explanation:

Authenticate each partner through a supported OAuth flow and execute the Analytics REST API query in that user's context. CRM Analytics evaluates access and dataset security for the authenticated user, allowing the security predicate to restrict returned rows according to that partner's region attributes.

Using one shared integration account would evaluate the query under that account's access rather than under each partner's access. Filtering results only in the portal after retrieving unrestricted data is not an appropriate substitute for enforcing CRM Analytics dataset security.

QUESTION NO: 13

consultant is tasked with creating an opportunity dataset for a new analytics app. One requirement is to make sure users only see the opportunities they have access to in Salesforce. Opportunity records are private but shared using the role hierarchy. The consultant runs

the sharing inheritance coverage assessment and finds that the VP of sales is not covered by the sharing inheritance. The consultant decides to proceed with using sharing inheritance for the dataset.

What else does the consultant need to do?

- A. Set the organization-wide default for the Opportunity object to Public Read/Write.
- B. Create a manual sharing rule to extend access to the VP of sales from the opportunity record.
- C. Flatten the role hierarchy in the recipe and set a backup securitypredicate based on opportunityowner and role path.

ANSWER: C

Explanation:

Flatten the role hierarchy in the recipe and set a backup securitypredicate based on opportunityowner and role path. is required because sharing inheritance can enforce Salesforce record access in a CRM Analytics dataset only for the users and sharing patterns that its coverage assessment supports. The assessment has identified an uncovered user: the VP of sales. Since Opportunity access is granted through the Salesforce role hierarchy, the dataset needs additional fields that represent the record owner's position in that hierarchy and a security predicate that evaluates the viewer's role path against it.

Flattening the hierarchy in the recipe makes the relevant role-path information available as dataset fields rather than requiring CRM Analytics to resolve the hierarchy dynamically at query time. The backup predicate then applies the equivalent role-based visibility rule for records not covered by inherited sharing. This preserves the intended private

Opportunity model while allowing managers, including the VP of sales, to see records owned by users below them in the hierarchy. Salesforce documents that sharing inheritance coverage should be assessed and that supplemental dataset security is needed for uncovered access patterns. See [Salesforce Help: Sharing Inheritance](#) and [Salesforce Help: Dataset Security](#).