

CRM Analytics and Einstein Discovery Certification | Sample Practice Exam Questions

Questions

Question Category: Security

1.) Universal Containers is setting up a Sales Analytics app to track the sales performance across all regions. The role hierarchy is well-structured with separate branches for various global regions. Viewer access has been provided to the regional sales reps based on the following roles.

- * Regional Sales - APAC
- * Regional Sales - EMEA
- * Regional Sales - LATAM
- * Regional Sales - NA

The CRM Analytics project team receives a request to extend Editor access to the app to 20 'Superusers' across all regions.

What is the optimal solution?

Answer Choices:

- A. Create a new public group with these users and assign it the Editor app access.
- B. Create new roles for these users and assign them the Editor app access.
- C. Create a new sharing rule for these users and assign it the Editor app access.

Correct Answer:

- A. Create a new public group with these users and assign it the Editor app access.*



Answer Reasoning and Documentation Links:

Analytics apps can be shared with users, groups, or roles. Roles are ideally created within an existing hierarchy. Sharing rules control access of Salesforce records beyond the role hierarchy. Since we wish to grant Edit access to the app to these super users and not change the record level access, C. is the best answer.

https://help.salesforce.com/s/articleView?id=analytics.bi_app_share.htm&type=5

https://developer.salesforce.com/docs/atlas.en-us.securityImplGuide.meta/securityImplGuide/user_groups.htm

https://trailhead.salesforce.com/content/learn/modules/data_security/data_security_sharing_rules

Question Category: Data Layer

2.) A CRM Analytics consultant at Cloud Kicks is trying to upload data using an External Data API and the CSV file with the data was uploaded successfully. Upon analyzing the data using a lens, they find they are unable to perform any mathematical operations as all the data and fields are treated as dimensions.

What is causing the problem?

Answer Choices:

- A. JSON metadata file was not uploaded along with the CSV data file.
- B. The field value added in the CSV file was contained within double quotes.
- C. Proper transformations need to be performed at the external source prior to External Data API callout.

Correct Answer:

- A. JSON metadata file was not uploaded along with the CSV data file.



Answer Reasoning and Documentation Links:

A dataset metadata file, also known as the Extended Metadata (XMD) is a JSON file that contains characteristics about the dataset that must also be migrated if the data is to be viewed and formatted correctly.

https://developer.salesforce.com/docs/atlas.en-us.254.0.bi_dev_guide_xmd.meta/bi_dev_guide_xmd/bi_xmd_intro.htm

https://developer.salesforce.com/docs/atlas.en-us.254.0.bi_dev_guide_xmd.meta/bi_dev_guide_xmd/bi_xmd_intro.htm

Question Category: Analytics Dashboard Implementation

3.) 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?

Answer Choices:

- 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.

Correct Answer:

B. Self assign as a dashboard publisher and make the changes to the dashboard in draft mode while maintaining a previous version live.

Answer Reasoning and Documentation Links:

Each of these are viable options, but Option B poses the least amount of risk or interfering with the workflow of the users. Ideally, major changes are made in a development org, then migrated to a production org. But if small changes need to be made to an existing dashboard, use the "publisher" function

https://help.salesforce.com/s/articleView?id=analytics.bi_dashboard_publisher.htm&type=5

Question Category: Admin/Configuration

4.) The CRM Analytics consultant at Universal Containers has set data syncs and recipe runs back to back. However, they notice that the data syncs and recipe run jobs fail repeatedly. Upon investigation, they realize the data syncs and recipes are tightly coupled which leads to too many runs being queued and eventually being canceled.

How should the consultant resolve this issue?

Answer Choices:

- A. Raise a case with Salesforce Support to help increase the concurrency limits of the org.
- B. Set up failure notifications so that the CRM Analytics consultant gets notified when this happens and can fix the issue.
- C. Enable priority scheduling to automatically queue shorter or smaller runs before longer or larger ones.

Correct Answer:

C. Enable priority scheduling to automatically queue shorter or smaller runs before longer or larger ones.

Answer Reasoning and Documentation Links:

Priority scheduling is available with Salesforce Data Pipelines at an extra cost and can help manage tight data schedules by prioritizing smaller runs. Salesforce can't always

increase concurrent recipe runs, and while notifications can be enabled, the consultant shouldn't be required to fix an issue if it can be prevented with an alternative solution.

https://help.salesforce.com/s/articleView?id=xcloud.sdp_integrate_priority_schedule.htm&type=5

Question Category: Einstein Discovery

5.) A CRM Analytics consultant is reviewing results from an Einstein Discovery story with a business user. They agree with the findings but notice that none of the fields used in the story have a correlation value greater than 4%. The client is now concerned that the model may not be good enough to deploy.

Which action should the consultant take?

Answer Choices:

- A. Identify additional data that may have a stronger relationship with the outcome variable.
- B. Edit the model accuracy settings and rerun it to evaluate the correlation.
- C. Use the appropriate algorithm and update the model.

Correct Answer:

A. Identify additional data that may have a stronger relationship with the outcome variable.

Answer Reasoning and Documentation Links:

When creating an Einstein Discovery Model, you select the target outcome, the variables (fields) you wish to use when discovering correlation or importance, and the type of model you wish to use. You can then make changes to the model based on your own findings or with the alerts and suggestions the model provides, which will usually include removing or adding variables, bucketing fields, or testing different models. Accuracy cannot be changed, as accuracy is based on the model used. If your model is

based on correlation and importance, then the model you use (GLM) will not likely need to change.

https://help.salesforce.com/s/articleView?id=analytics.bi_edd_story_modify.htm&type=5

Question Category: Analytics Dashboard Design

6.) 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?

Answer Choices:

- 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.

Correct Answer:

A. Set the optimal Dashboard width for the Phone layout to get a more accurate preview.

Answer Reasoning and Documentation Links:

Optimizing a new layout, in this case, a phone layout, is ideal for those who will be viewing charts on a mobile device. Maximum and minimum widths can be set and previewed when editing your dashboard. Remember, dashboards can still be viewed on a mobile device, even if a mobile layout hasn't been created, but will automatically display all widgets according to the dimensions of the mobile device. No defaults need to be set; CRMA will display the information according to the device and display settings in the dashboard and layouts you have created. It is best to customize the layout for the optimal viewing. "Enable mobile optimization" is not a setting in Setup.



https://help.salesforce.com/s/articleView?id=analytics.bi_dashboard_layout_select_flow.htm&type=5

https://help.salesforce.com/s/articleView?id=analytics.bi_mobile_admin_landing.htm&type=5

SAMPLE