Building Lenses, Dashboards, and Apps in CRM Analytics

ANC201

Job Role:
Analyst

Duration:
1 Day

In the CRM Analytics course, you will learn to design and create effective dashboard layouts to help users navigate easily. You'll also learn to create lenses and add them to your dashboards using the CRMA Dashboard Designer. Additionally, you will learn how to optimize the dashboard for mobile and embed CRMA dashboards into home pages and lightning record pages.

Overview

Who should take this course?

This course is created for CRMA business users who build effective lenses and dashboards for data analysis. It is also suitable for business users who connect and integrate data to understand its use in building lenses and dashboards.

When you complete this course, you will be able to:

✓ Manage apps and their assets.

✓ Understand dashboard design guidelines and best practices.

✓ Build dashboards to meet end-users' needs.

About CloudWise

We offer Authorized Salesforce training with several guaranteed-to-run classes each month. We are an industry-leading authorized Salesforce training provider and part of Layer 8 Training.

✓ Increase data quality with advanced validation rules and formula functions.

✓ Embed CRMA dashboards into home pages and Lightning record pages.

✓ Create mobile layouts for dashboards.

Lessons & Topics

Apps and Assets
- Understand Building and Managing Apps
- Manage User Access to Apps

Dashboard Design
- Follow Dashboard Building Basics
- Define Dashboard Widget Types
- Choose Between Dashboard Template Options

Dashboard Design Best Practices
- Build a Dashboard
- Construct Dashboards with Chart, Table, Number, and Filter Widgets
- Understand and Apply Widget and Query Properties
- Design Dashboard Pages and Navigation

Data Quality
- Embed a CRMA Dashboard in Salesforce Home Page
- Embed a CRMA Dashboard in an Account Record Page

Supplemental Materials and Optional Project
- Optimize a Browser and Dashboard for Mobile
- Add Additional Widget Properties
- Explore CRMA Resources and Next Steps

Contact us for upcoming classes and pricing:

Email: register@cloudwiselearning.com
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