

Implement and Manage CRM Analytics

ANC301



Elevate your CRM Analytics skills with our 3-day instructor-led course. Learn to build and implement a CRMA environment incorporating both Salesforce and non-Salesforce data. Our team of experts will guide you through CRMA features and settings, user setup, data loading and transformation, data security, and customizing queries to personalize dashboards for improved efficiency, trend identification, and faster outcome predictions.

Overview

Who should take this course?

This course is tailored for integration specialists and Salesforce administrators who want to expand their knowledge of connecting and securing data in CRMA. It's also ideal for business analysts and developers looking to create advanced dashboards.

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

- ✓ Determine your user, data, and security requirements to establish a development process.
- ✓ Assign users licenses, permission sets, and app permissions to control user access to CRMA.
- ✓ Load external data to CRMA.
- ✓ Implement dataflows to load Salesforce data and join it with data from other datasets.
- ✓ Harness Data Sync Effectively
- ✓ Define recipes and data prep.

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.

- ✓ Employ data security in CRMA.
- ✓ Override security for implementation and testing.
- ✓ Outline how interactions and filters on dashboards function.
- ✓ Understand the JSON file of a dashboard.
- ✓ Adjust a query to meet specific analytic requirements.
- ✓ Modify dataset metadata.

Lessons & Topics



Discovery and Planning

- Meet for Discovery
- Log In
- Establish Users and Development Processes



User Setup and Apps

- Define User Access on the CRMA Platform
- Create CRMA Permission Sets
- Assign Licenses and Permission Sets to Users
- Create and Share CRMA Apps



Data Connection

- Define Data in CRMA
- Map Data
- Work with CSV files
- Use Data Manager
- Implement Data Sync and Connections
- Schedule
- Generate
- Build Dataflows



Data Security

- Determine Security Requirements
- Predicate Filters
- Predicate Filters and Salesforce Data
- Assign Ownership-Based Row-Level Security
- Determine Role-Based Row-Level Security
- Override Security for Implementation and Testing
- Implement Team-Based Row-Level Security
- Design Sharing Inheritance
- Assess Key Considerations
- Apply Sharing Inheritance to a Dataset



Metadata in a Dataset

- Control Dataset Metadata
- Access Salesforce Records with Dataset Actions



Dashboard Builds

- Get To Know the Dashboard
- Build Dashboard Templates
- Understand Dashboard JSON Files
- Build a Dashboard Using a JSON File Template
- Optimize a Dashboard for Mobile
- Create a Mobile Layout



Advanced Dashboards and Interactions

- Optimize a Multi-Dataset Dashboard by Connecting Data Sources
- Create a Dynamic Filter with a Result Interaction
- Adjust a Chart with Custom Queries



Dashboard Query Modification

- Add Derived Measures to Dashboards
- Query Multiple Datasets in One Lens
- Modify Complex Queries with SAQL and SQL
- Evaluate Dashboard Performance with Dashboard Inspector

Contact us for upcoming classes and pricing:

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