
Module 3: Tableau CRM and Einstein Discovery Consultant Cert Prep: Design & Discovery

Unit 1: Study Up on Tableau CRM Dashboard Design

Learning Objectives

After completing this unit, you'll be able to:

- Given a customer situation, determine and define the customer's dashboarding needs.
- Given customer requirements, create meaningful and relevant dashboards through the application of user experience (UX) design principles and Tableau CRM best practices.
- Given business requirements, customize existing Tableau CRM template apps to meet the business needs.

Key Topics

This unit prepares you for the Tableau CRM Dashboard Design section of the Salesforce Tableau CRM and Einstein Discovery Consultant exam, which makes up 19% of the overall exam. This section of the exam tests these topics.

- Dashboard creation
- Dashboard design
- Tableau CRM app and dashboard templates

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce Tableau CRM and Einstein Discovery consultant. Looking at these scenarios helps prepare you to take the Tableau CRM Dashboard Design section of the Salesforce Tableau CRM and Einstein Discovery Consultant exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards centered around study topics that help you prepare for the Tableau CRM Dashboard Design section of the exam.

Exam Practice Questions



Question 1

A Tableau CRM consultant needs to show total values of all cases by case status, grouped by month/year the case was created.

Which chart would effectively achieve this business requirement?

A	Pie chart	Incorrect. Use a pie chart when you have multiple groupings and want to show the proportion of a single value for each grouping against the total.
B	Lin chart for each status value	Incorrect. Use a line chart when you have one important grouping representing an ordered set of data and one value to show.
C	Funnel chart	Incorrect. Use a funnel chart when you have multiple groupings in an ordered set and want to show the proportions among them.
D	Stacked bar chart or stacked column chart	Correct. Use the bar or column chart to provide a quick visual comparison of related values.

Question 2

What is an advantage of using Tableau CRM templated apps?

A	When creating an app from a template, it automatically creates datasets and dashboards, speeding your organization's time to value.	Correct. Tableau CRM templated apps and prebuilt Tableau CRM apps from Salesforce speed your organization's time-to-value with Tableau CRM.
B	When creating an app from a template, the template automatically creates the users, profiles, and permission sets needed to execute the application, so that the user can start building their dashboards.	Incorrect. Tableau CRM does not create users, profiles, or permission sets.
C	When creating an app from a template, Tableau CRM automatically creates recipes for lenses and datasets in the application.	Incorrect. Tableau CRM templates do not automatically create recipes between datasets.
D	When creating an app from a template, Tableau CRM automatically creates the flows needed.	Incorrect. Tableau CRM does not create flows in your org.

Question 3

What is a requirement when using an Approval Analytics Template?

A	The user needs to have View All Data access as well as the right licenses to use this template.	Incorrect. This gives the user more visibility than required.
B	Make sure all app users, including the Analytics Integration User, have the Tableau CRM license.	Incorrect. Ensuring users have the correct license assigned does not complete all of the requirements to utilize Approval Analytics templates.
C	The org needs to have a defined approval process and at least one object with a record submitted for approval, and users need the right licenses.	Correct. All users need the appropriate analytics user licenses; the org must have a defined approval process; and the field-level security must be set for the Analytics Integration User to see all fields used in the app.
D	The org needs to have sharing rules defined for the data that will be processed by the application.	Incorrect. Defining sharing rules does not complete all of the requirements to utilize Approval Analytics templates.

Did you get a scenario wrong? Check out the table below for related study material.

Scenario 1	Review Bar Charts to learn how to group values across one or more categories.
Scenario 2	Study Deploy Tableau CRM Prebuilt Apps to learn about the advantages of using templates in Tableau CRM.
Scenario 3	Learn what requirements you need to implement an Approval Analytics Template .

Exam Topic Flashcards

Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam. Read the question or term on each card, then click on the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left-facing arrow to return to the previous card.

Card 1

What is the Event Monitoring Analytics App?	The Event Monitoring Analytics App integrates with event monitoring and setup audit trail data to give you insights into your user and org behavior.
---	--

Card 2

Before you begin building your dashboard, what is the first step you should take?	Sketch your dashboard on paper or a whiteboard before you start building.
---	---

Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Learn how to use the Event Monitoring Analytics App to gain insights into your user and org behavior.
Flashcard 2	Review Best Practices for Building Your Own Tableau CRM Dashboard before you begin building your dashboard.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 <p>Tableau CRM Dashboard Building Basics</p>	Module
 <p>Tableau CRM for Sales App</p>	Module
 <p>Tableau CRM for Service App</p>	Module
 <p>Event Monitoring Analytics App</p>	Module
 <p>Tableau CRM App Design</p>	Module
 <p>Tableau CRM App Template Development</p>	Module
 <p>Salesforce Einstein Basics</p>	Module
 <p>Einstein Prediction Builder</p>	Module
 <p>Quick Start: Tableau CRM</p>	Project

Resources

- [Help Article: Salesforce Credential and Certification Program Agreement and Code of Conduct](#)
- [Salesforce Help: Best Practices for Building Your Own Tableau CRM Dashboard](#)

Unit 2: Explore Einstein Discovery Story Design

Learning Objectives

After completing this unit, you'll be able to:

- Given a dataset, use Einstein Discovery to prepare data for story output by accessing data and adjusting outputs.
- Given initial customer expectations, analyze the story results and determine suggested improvements that can be presented to the customer.
- Given derived results and insights, adjust data parameters, add/remove data, and rerun the story as needed.
- Describe the process to perform writebacks to Salesforce objects.

Key Topics

This unit prepares you for the Einstein Discovery Story Design section of the Salesforce Tableau CRM and Einstein Discovery Consultant exam, which makes up 19% of the overall exam. This section of the exam tests these topics.

- Dataset customization and output
- Data story improvements
- Data analysis and discovery
- Data writebacks to Salesforce objects

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce Tableau CRM and Einstein Discovery consultant. Looking at these scenarios helps prepare you to take the Einstein Discovery Story Design section of the Salesforce Tableau CRM and Einstein Discovery Consultant exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards centered around study topics that help you prepare for the Einstein Discovery Story Design section of the exam.

Exam Practice Questions



Question 1

How can the What Could Happen Insights feature help a Tableau CRM consultant with analysis and discovery?

A	It displays existing data from past transactions to help the consultant understand dashboards that have been created.	Incorrect. Analyzing past transactions does not help a consultant understand dashboards that have been created.
B	It uses data to statistically calculate probable outcomes of future events.	Correct. Einstein Discovery conducts predictive analysis to predict future outcomes, and prescriptive analysis to suggest ways in which to improve those outcomes.
C	It determines what data should be excluded from the dataset.	Incorrect. What Could Happen insights do not analyze the dataset to determine what fields should be excluded from predictive analysis.
D	It summarizes data from the past and gives the consultant performance information about the dashboards.	Incorrect. What Could Happen insights do not determine dashboard performance.

Question 2

When preparing data for predictive analytics, how can a Tableau CRM consultant address the data quality issue of missing values?

A	Fill in the missing values with the word “empty”.	Incorrect. Filling in the missing values with the word “empty” will create unnecessary additional values that do not address the data quality. *
B	Create a filter to remove all records that are missing any data in any field.	Incorrect. If you filter out records with missing values, you could be missing the pattern within the missing data or possibly undermine the real-world aspects in your analysis.
C	Fill in the missing values with trending information from other records.	Incorrect. Filling in missing values with other trending information from other records will skew the results.
D	Reduce the standard deviation by introducing a mean value or remove records with missing values (only if the records don't impact the analysis).	Correct. This is the most efficient way to cleanse and prepare your data for Tableau CRM.

Did you get a scenario wrong? Check out the table below for related study material.

Scenario 1	Study up on Explore Predictions and Improvements to learn how to perform interactive, “what if” analyses on predicted outcomes.
Scenario 2	Learn how to improve your data quality by reviewing Collect, Cleanse, and Optimize Your Data .

Exam Topic Flashcards

Use these interactive flashcards to brush up on some of the key topics you’ll find on this part of the exam. Read the question or term on each card, then click on the card to reveal the correct answer. Click the right- facing arrow to move to the next card, and the left-facing arrow to return to the previous card.

Card 1

What is the total maximum number of story creations per org per day?	20
--	----

Card 2

When preparing the data, what is the term when there are too many variable fields used?	Overfitting
---	-------------

Card 3

What permission and permission set does a user need to access Einstein Discovery?	Tableau CRM Plus User general users, and Tableau CRM Plus Admin for admin access
---	--

Card 4

Einstein Discovery uses waterfall charts to help you visualize what type of insight?	Why It Happened insights
--	--------------------------

Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Review Einstein Discovery Capacities and Limits to ensure you stay within org limits.
Flashcard 2	Study Get Started with Data Prep to avoid common issues when preparing your data.
Flashcard 3	Learn About Einstein Discovery Permissions and Permission Sets and discover how to set up permission sets for users.
Flashcard 4	Explore Why a Value Does Better or Worse Than Average to learn how to take a deeper look into the various factors that contributed to an outcome.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Einstein Discovery Basics	Module
 Einstein Discovery Stories	Module
 Einstein Discovery Story Insights	Module
 Tableau CRM and Einstein Discovery Insights Specialist	Superbadge

Resources

- [Salesforce Help: Explore Storie Insights](#)
- [Salesforce Help: Evaluate Model Quality](#)
- [Salesforce Help: Einstein Discovery Capacities and Limits](#)
- [Salesforce Help: Prepare Your Data](#)
- [Salesforce Help: Display Einstein Predictions Using Custom Fields](#)
- [Salesforce Help: Improve Your Einstein Discovery Models by Investigating Their Metrics and Performance](#)

