

# Ace Your Exam with Salesforce CRM Analytics and Einstein Discovery

## Understanding Salesforce CRM Analytics

**Salesforce CRM Analytics** empowers businesses to derive meaningful insights from their data. By mastering this tool, you can unlock scenarios that showcase your ability to transform raw data into actionable strategies. Grab this opportunity to shine in your exams. For further details, visit [here](#).

## Diving into Einstein Discovery

**Einstein Discovery** uses AI to provide predictive insights and recommendations. Familiarizing yourself with its functionalities is crucial for both practical applications and exam questions. Make sure to explore its features, as they frequently appear in exam scenarios.

## Boosting Skills with Salesforce Data Analytics

**Salesforce Data Analytics** plays a pivotal role in decision-making processes. Understanding how to interpret various data types and dashboards can significantly enhance your skill set and your chances of passing the certification exams. Learn more about this through relevant resources like [this link](#).

## The Role of a CRM Analytics Consultant

A **CRM Analytics Consultant** is vital for organizations looking to make informed decisions. Being aware of how this role fits into the wider business context will prepare you for exam questions regarding responsibilities and best practices.

## Business Intelligence within Salesforce

Utilizing **business intelligence tools** in Salesforce can give you an edge. Differentiate between *standard* and *advanced analytics* offerings, and be ready to discuss them in your exam for a better score!

## Preparing for Salesforce Certification

Getting ready for your **Salesforce Certification** requires dedication and thorough understanding. Key topics like analytics, reporting, and workflow should always be part of your review plan. Build a structured study guide based on these topics for effective preparation.

## Hands-on Practice with Sample Questions

Hands-on practice is essential. Work through sample exam questions and scenarios related to **Salesforce CRM tools**. This will help solidify your understanding and better prepare you for what to expect.

## Join Study Groups or Forums

Collaborating with others can enhance your learning experience. Join *study groups* or *forums* where you can discuss concepts and clarify doubts. Engaging with peers can help you retain information more effectively.

## Utilize Salesforce Trailhead

**Salesforce Trailhead** is a fantastic resource providing numerous learning paths. Use this platform to engage with interactive modules and quizzes on topics related to your exam. It's both fun and educational!

## Stay Updated with Salesforce Releases

Salesforce frequently updates its features. Keeping abreast of these changes can give you insights that may come in handy during the exam, especially in real-world applications of **CRM Analytics**.

## Time Management During the Exam

Effective time management is key to completing your exam successfully. Practice pacing yourself during mock exams so that you can allocate sufficient time to each question.

## Understanding Exam Format and Structure

Knowing the format of the exam can calm your nerves. Familiarize yourself with types of questions such as *multiple choice*, *scenario-based queries*, and *true/false statements*.

## Review Regularly

Regular review sessions can reinforce your knowledge. Schedule these sessions strategically, giving yourself the time needed to absorb information without cramming.

## **Incorporate Real-world Scenarios**

- Linking theory to real-world scenarios can greatly enhance your understanding.
- Consider how Salesforce is utilized in different industries and be prepared to answer questions based on practical application.

## **Take Care of Your Well-being**

Lastly, don't overlook your well-being while prepping for the exam. Ensure you're getting enough sleep, eating healthily, and taking breaks to refresh your mind. A well-rested mind absorbs information better!

Good luck with your exam preparation! Remember, consistent study and practice can lead to success. Â© 2025

# Real Exam Questions 2025

Below given questions are for demo purposes only. **The full version** is up-to-date and contains actual questions and answers.

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# Salesforce

## CRM-ANALYTICS-AND-EINSTEIN-DISCOVERY-CONSULTANT Exam

**Salesforce Certified CRM Analytics and Einstein Discovery Consultant**

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# Version: 4.0

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**Question: 1**

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Universal Containers has a dashboard for sales managers. They need to visualize the percentage of their opportunities in the pipeline in a Gauge chart. They want to customize the chart to keep track if they are below or beyond the target.



Which widget parameters should a consultant use?

- A. Range Values, Angle, Conditional Formatting
- B. Reference Line, Angle, Range Values
- C. Reference Line, Markers, Conditional Formatting

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**Answer: C**

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Explanation:

In the scenario described, the sales managers at Universal Containers require a Gauge chart that not only shows the current percentage of opportunities in their pipeline but also indicates whether they are below or beyond their set targets. The appropriate widget parameters to achieve this visualization in Salesforce CRM Analytics (formerly known as Einstein Analytics) are:

**Reference Line:** This parameter is crucial for defining a specific target value on the gauge chart. It visually marks a point that represents the target goal, providing an immediate visual cue as to whether the current percentage is below or above this point.

**Markers:** Markers are used to represent and highlight specific values on the gauge chart. They can be utilized to emphasize the current percentage level of the pipeline, making it instantly visible how close or

far the current value is from the reference line or target.

**Conditional Formatting:** This feature allows the chart to change color or style based on whether the current values meet, exceed, or fall below the target. It is a critical visual tool for quickly communicating performance against targets. Conditional formatting can be set to alter the appearance of the gauge's fill color based on whether the values are above, equal to, or below the reference line, thereby providing an intuitive visual representation of performance relative to targets.

The combination of these three parameters enables a highly effective visualization for sales managers to monitor their performance against key metrics and targets directly on their dashboards. This setup is aligned with Salesforce's best practices for creating meaningful and actionable insights within CRM dashboards, ensuring that users can easily interpret and react to the data presented.

For more details on configuring these parameters, you can refer to Salesforce documentation and specific Trailhead modules that cover dashboard creation and customization:

[Wave Analytics Explorer](#)

[Building Lenses, Dashboards, and Apps in CRM Analytics](#)

These resources provide in-depth training and examples to help users effectively use Salesforce CRM Analytics for a wide range of data visualization needs.

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## Question: 2

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CRM Analytics team plans to enable data sync.

Which limit specific to data sync should the team consider before enabling the feature because it may impact existing jobs?

- A. Maximum number of data sync jobs cannot exceed the limit
- B. Maximum number of Full Sync connection mode enabled
- C. Maximum number of objects that can be enabled for data sync

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**Answer: C**

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Explanation:

In CRM Analytics, when planning to enable data sync, one of the critical considerations is the limit on the number of objects that can be enabled for data sync. This limit is essential because it determines how many different Salesforce objects (like Accounts, Opportunities, etc.) can be synchronized concurrently. Exceeding this limit could impact the performance of existing sync jobs or prevent new sync jobs from being configured.

Key points to consider include:

**Performance Impact:** Syncing too many objects simultaneously can lead to increased load times and potential delays in data availability, impacting users' ability to access up-to-date information.

**Resource Allocation:** CRM Analytics allocates resources based on the number of objects being synchronized, and there are practical limits to these resources to ensure stable and efficient operation.

For a more detailed understanding and to manage these limits effectively, Salesforce provides documentation and guidelines within the CRM Analytics resources, which can be further explored in the Trailhead modules specifically focusing on data management and synchronization practices.

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## Question: 3

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A dashboard designer at Cloud Kicks creates a dashboard in CRM Analytics. The designer notices fields

display on the dashboard with their API labels, such as "AccountId.Industry", and wants to change this behavior.

The designer also notices that the fields and their order appear to randomly change when a values table is created.

What should the CRM Analytics consultant explain to help the designer?

A. The default fields in a values table can be changed by reordering how fields appear in the JSON of the value table.

B. The default fields in a values table and the field labels can be modified in the dataset explorer.

C. The field labels can only be changed in the widget properties in the dashboard edit mode.

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**Answer: B**

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Explanation:

For the scenario at Cloud Kicks where fields display with their API labels and the fields in a values table seem to change order randomly, the correct approach is to modify these settings in the dataset explorer within CRM Analytics. This allows for a more intuitive display and control over how data is presented in dashboards.

Here's how these adjustments help:

**Modifying Field Labels:** Changing the field labels from their API names to more user-friendly names enhances readability and user experience. This can be done directly in the dataset explorer, which affects how fields appear across all dashboards utilizing that dataset.

**Controlling Field Order:** The order of fields in a values table can seem random if not explicitly set. By using the dataset explorer, a designer can specify the order in which fields appear, which then reflects consistently in the dashboard's values table.

This functionality is part of CRM Analytics' aim to provide flexible and customizable data visualization tools. Training on these features is available through various Salesforce Trailhead modules that discuss dashboard and dataset customization techniques, providing practical insights and guided tutorials to enhance dashboard design and user interaction.

Both these explanations are consistent with best practices as outlined in Salesforce's CRM Analytics documentation and the Trailhead educational content, ensuring that users are well-equipped to leverage the full capabilities of CRM Analytics for effective data management and presentation.

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**Question: 4**

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Universal Containers (UC) is rolling out CRM Analytics to its field sales that include dashboards with order data from an external source.

UC has a well-defined role hierarchy where everyone is assigned to an appropriate node on the hierarchy. In addition, the order data has a reference to a Salesforce opportunity.

An individual sales rep should be able to view all orders that they own or as part of the account team or opportunity team. The sales manager should be able to view all orders for the entire sales team.

Similarly, the VP of sales should be able to view orders for everyone who rolls up in that hierarchy.

The dataset has a field called OwnerId which represents the order owner.

Given this information, how should a CRM Analytics consultant implement the above requirements?

A. As part of the recipe, use a formula on the RoleId field to create an attribute called 'ParentRoleIds' on the dataset, and apply the following security predicate: 'ParentRoleIds' == "\$UserRoleId" || Owned\ ==

'\$User,id\\,

B. As part of the recipe, use the flatten operation on the role hierarchy, create a multi-value attribute called 'ParentRoleIDs' on the dataset, and apply the following security predicate: 'ParentRoleIDs' == "\$User.UserRoleId" || 'TeamMember.Id' '\$User, Id" || 'OwnerId' == "\$User.Id".

C. As part of the recipe, use a multi row formula on the RoleId field to create an attribute called 'ParentRoleIDs' on the dataset, and apply the following security predicate: "\$User.UserRoleId" || 'OwnerId' == "\$User.Id".

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**Answer: B**

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Explanation:

In addressing the requirements of Universal Containers to ensure proper visibility of order data across different levels of the sales hierarchy, the use of a security predicate based on role hierarchies is paramount. Here's why Option B is the ideal approach:

**Flatten Operation on Role Hierarchy:** This operation is essential as it allows for the creation of a simplified or "flattened" view of the hierarchical relationships within the organization. This flattened view enables the dataset to understand and respect the hierarchical structure in security implementations.

**Creating a Multi-value Attribute ('ParentRoleIDs'):** By creating this attribute, the recipe can hold multiple role IDs that a particular user has visibility permissions for. This is crucial in a hierarchical organization like UC where data visibility needs to cascade down the hierarchy.

**Security Predicate:** The predicate ('ParentRoleIDs' == "\$User.UserRoleId" || 'TeamMember.Id' == '\$User.Id' || 'OwnerId' == "\$User.Id") effectively enforces that:

A user can see all orders where their role matches any of the role IDs in the 'ParentRoleIDs' list (hierarchical visibility).

A user can see all orders where they are specifically listed as a team member.

A user can see all orders where they are the owner.

This approach aligns with best practices for implementing row-level security in CRM Analytics, ensuring data visibility is managed correctly according to the defined organizational hierarchy and individual data ownership.

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**Question: 5**

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consultant is reviewing a model that is set to maximize the daily sales quantity of consumer products in stores, and they see this recommendation.

### Data Alerts

**For Review**

Einstein detected possible issues in your data. Review alerts and address data issues to get better insights, predictions, and improvements. [Learn more](#)

#### High Correlation

Store explains 35% of the variation in DailyQuantity. Such a high correlation might indicate possible data leakage. Investigate Store to determine whether it contains the information you are trying to predict. If data leakage is found, exclude Store from the story.

☐ Exclude Store

☐ Ignore alert

Which action should the consultant take?

- A. Verify client expectations that Store is a strong predictor for daily sales quantity.
- B. Remove the Store field from the model definition, because that is the recommended action.
- C. Ignore alert; the explanation of variation is only 35%, which is below 50%,

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**Answer: A**

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Explanation:

Upon reviewing the data model and noticing the high correlation alert between 'Store' and daily sales quantity, the appropriate action is to verify with the client their expectations regarding the influence of the Store field on daily sales. Here's the rationale:

**Understanding the Role of 'Store' in the Model:** Before making any changes to the model, it's crucial to understand whether the 'Store' field is expected to be a strong predictor based on the business context. If the client expects that different stores inherently have different sales volumes due to factors like location, size, or customer base, this correlation may be both meaningful and desired.

**Potential Data Leakage:** High correlation warnings can sometimes indicate data leakage, where a predictor (like 'Store') might inadvertently include information about the outcome variable (daily sales quantity). It's essential to verify whether this correlation makes sense logically or if it's skewing the model predictions.

**Client Consultation:** Consulting with the client helps ensure that any modeling decisions align with their business knowledge and expectations. It's about validating the model against real-world expectations and ensuring it remains a useful tool for decision-making.

By taking these steps, the consultant not only adheres to best practices in data science by validating model inputs and their implications but also ensures that the model aligns with the client's business strategies and operational realities.

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