

**Salesforce Einstein Analytics & Discovery Consultant**

**Course Number:** SF-120  
**Duration:** 5 days

**Overview**

This Salesforce® Einstein Analytics & Discovery Consultant training course teaches attendees how to design, build, and support apps, datasets, dashboards, and stories in Einstein Analytics and Discovery. Students also learn the data ingestion process, security and access implementations, and dashboard creation. This class is an alternative to the three Einstein Analytics classes offered by Salesforce (ANC101, ANC201, and ANC301).

This course is appropriate preparation for the Salesforce Einstein Analytics and Discovery Consultant exam.

**Prerequisites**

All students must have general technology experience.

**Materials**

All Salesforce Einstein & Discovery training students will receive comprehensive courseware.

**Software Needed on Each Student PC**

Each student will be given a practice learning environment to use during hands-on exercises during the class. The student will be able to use this learning environment indefinitely after the class without any additional fee.

**Objectives**

* Learn how to get the most out of Einstein Analytics and Discovery
* Understand the data ingestion process
* Practice how to implement security and access implementations
* Create a dashboard
* Manage datasets
* Set permissions and security implementations
* Learn advanced Salesforce Analytics Query Language (SAQL) coding to support querying
* Use JSON to support dashboard creation on desktop and mobile devices

**Outline**

* Introduction
  + Course Overview
  + Setting up a Practice Site
  + Tableau CRM Overview
    - What is Tableau CRM?
    - Exploration Process
    - Data Exploration
    - Data Collections
    - Dashboards
    - Apps
  + Setup the Tableau CRM Platform
    - Platform Licenses
    - Permission Sets
    - Optional Setup Procedures
    - Requirements and Limits
* Working with Data
  + Data Integration
  + Data Sync
  + Dataflow
  + Bring Data into Tableau CRM
  + Recipes
  + Knowledge Check
  + Questions and Answers
* Security
  + Data Access in Tableau CRM
  + Row-Level Security
  + Field-Level Security
  + App Level Sharing
  + Knowledge Check
  + Questions and Answers
* Data Exploration and Visualization
  + Data exploration
    - Lenses
    - Tables
    - Charts
  + Dashboard Design
    - Design Best Practices
    - Dashboard Widgets
    - Dashboard Charts
    - Dashboard Tables
    - Dashboard Filters
  + Dashboard Layouts
    - Managing Layouts
    - Layout Selection
* Tableau Integration
  + Embedding Tableau CRM
    - Adding Dashboards to Lightning Pages
    - Adding Dashboards to Communities
  + Actions in Tableau CRM
    - Available Actions
    - Creating Actions
    - Adding Actions to Datasets
  + Dashboard Optimization
    - Dashboard Queries
    - Dashboard Inspector
    - Dashboard Pages
* SAQL and Interactions
  + SAQL
    - SAQL Structure
    - SAQL Functions
  + Interactions
    - Faceting
    - Selection Bindings
    - Result Bindings
* Working with Templates
  + Dashboard Templates
    - Prebuilt Layouts
    - Design Challenge
    - Smart Templates
  + Templated Apps
    - Available Templates
    - Service Analytics App
    - Sales Analytics App
  + Migration, Packaging, Distributing
    - Change Sets
    - Managed Packages
    - Metadata API
    - Tableau CRM REST API
    - Creating App Templates
* Einstein Discovery
  + Set up Discovery
  + Define a Use Case
  + Prepare Your Data
  + Create and Manage Stories
  + Explore Story Insights
  + Deploy a Model
* Conclusion and Certification Test
  + Questions and Answers
  + Practice Certification Test
  + Review Certification Test