

Module 1: Tableau CRM and Einstein Discovery Consultant Cert Prep: Data Layer and Admin

Unit 1: Get Started with Salesforce Tableau CRM and Einstein Discovery Consultant Certification Prep

Learning Objectives

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

- Describe the key topic areas of the Salesforce Tableau CRM and Einstein Discovery Consultant Certification.
- Access resources to prepare yourself for the Salesforce Tableau CRM and Einstein Discovery Consultant Certification.

The Salesforce Tableau CRM and Einstein Discovery Consultant Certification

The Salesforce Tableau CRM and Einstein Discovery Consultant credential is designed for individuals who have broad knowledge of the Tableau CRM and Einstein Discovery platform and its capabilities, including: dataset management, permissions and security implementations, advanced Salesforce Analytics Query Language (SAQL) coding to support querying, and JSON.

The Salesforce Certified Tableau CRM and Discovery Consultant candidate has the experience, skills, and knowledge outlined below.

- Certification or experience with other business intelligence (BI), extract-transform-load (ETL), Tableau CRM, and reporting tools.
- Understanding of dashboard/user experience (UX) design and aesthetics for mobile and desktop.
- Competency in reading and writing Salesforce Analytics Query Language (SAQL) and Salesforce Object Query Language (SOQL).
- Competency in developing ETL processes for dataset preparation and management.
- Understanding of Master Data Management (MDM).
- Competency with developing stories in Einstein Discovery.
- Working knowledge of data science lifecycle.
- Working knowledge of statistical analysis.
- Working knowledge of data modeling.
- Experience leading technical projects.
- Competency in administering, configuring, and securing Tableau CRM.
- Optional experience with administration, configuration, and securing Salesforce.
- Configure and perform write-back to Salesforce for Discovery models.

This exam covers these key topics, each making up a certain percentage of the exam.

- Data layer: 24%
- Security: 11%

- Admin: 9%
- Tableau CRM dashboard design: 19%
- Tableau CRM dashboard implementation: 18%
- Einstein Discovery story design: 19%

By successfully passing the Salesforce Tableau CRM and Einstein Discovery Consultant exam, you demonstrate a thorough knowledge and understanding of the Tableau CRM and Einstein Discovery tools and capabilities.

Preparing for the Exam

Preparing for the Salesforce Tableau CRM and Einstein Discovery Consultant exam takes time! This module takes you through preparing for part of the exam. There are two additional modules to help you continue your journey toward certification.

- Tableau CRM and Einstein Discovery Consultant Cert Prep: Security and Implementation
- Tableau CRM and Einstein Discovery Consultant Cert Prep: Design and Discovery

All modules contain real-world scenarios, interactive flashcards, links to resources, and key topic areas to study.

Don't forget to join the [Trailblazer Community](#), where you can ask questions, collaborate, and join groups to help you prepare for your exam.

Download the Guide

Would you like a hard copy of each of the module's content as a study aid? Here is a printable guide for each module that you can download.

- Tableau CRM and Einstein Discovery Consultant Cert Prep: Data Layer and Admin
- Tableau CRM and Einstein Discovery Consultant Cert Prep: Security and Implementation
- Tableau CRM and Einstein Discovery Consultant Cert Prep: Design and Discovery

Exam Logistics and Policies

Curious about the logistics of the exam? Here are some quick facts for you.

Recommended Experience	A minimum of one year of experience and skills across the Tableau CRM and Einstein Discovery domains.
Number of Questions	60
Passing Score	68%
Time to Complete the Exam	90 minutes
Results	Received immediately
Cost	\$200
Location	Online or at a facility in your area
Restrictions	No hard-copy or online materials can be referenced during the exam

The quality of our certification exams and the value our credentials provide is our highest priority. Protecting the security and confidentiality of our exams is essential to providing our customers with credentials that are respected and industry-leading.

As a participant of the Salesforce Certification program, you're required to accept the terms of the [Salesforce Certification Program Agreement](#). Click [here](#) to take a look at some important reminders about the certification exam.

Maintain Your Certification

Once you take and pass your exam, how do you maintain your certification?

To maintain Salesforce Certification credentials, all certified professionals must successfully complete release maintenance exams specific to their credential. So, you need to complete the Tableau CRM and Einstein Discovery Consultant Certification Maintenance module that's provided for each release. There are three releases each year for the Tableau CRM and Einstein Discovery Consultant Certification (Summer, Winter, Spring). If you don't complete your maintenance requirements by the completion due date, your credentials expire.

Note: If you'd like more information about certification maintenance, visit the [Maintaining Your Salesforce Credential](#) page.

What This Module Covers

This module is focused on these key topics, with each topic covered in its own unit.

- Data layer: 24%
- Admin: 9%

In each of the units, you learn the key areas to study for these sections of the exam, including working through common scenarios.

Up first, dive into the exam section on Study Up on the Data Layer. Let's go!

Resources

- [Help Article: Salesforce Credential and Certification Program Agreement and Code of Conduct](#)
- [Salesforce: Tableau CRM Learning Map](#)
- [Salesforce Trailhead Credentials: Tableau CRM and Einstein Discovery Consultant](#)
- [Salesforce Trailhead Credentials: Tableau CRM and Einstein Discovery Consultant Exam Guide](#)

Unit 2: Study Up on the Data Layer

Learning Objectives

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

- Extract and load data into the Tableau CRM application to create datasets.
- Describe how the Salesforce platform features map to the model-view-controller (MVC) pattern.
- Implement refreshes, data sync (replication), and recipes to appropriately solve the basic business need.
- Identify the common scenarios for extending an application's capabilities using AppExchange.
- Demonstrate knowledge of what can be accomplished with the Tableau CRM API.
- Use Tableau CRM to design a solution that accommodates dataflow limits.

Key Topics

This unit prepares you for the Data Layer section of the Salesforce Tableau CRM and Einstein Discovery Consultant exam, which makes up 24% of the overall exam. This section of the exam tests these topics.

- Extract and load data into Tableau CRM
- Dataset creation
- Data replication and refresh
- Data recipes
- Data flow limits
- Tableau CRM API

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 Data Layer section of the 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 Data Layer section of the exam.

Exam Practice Questions



Interactive Questions

Question 1

Universal Containers (UC) has two Salesforce organizations, Org 1 and Org 2. UC needs to create a dataset in Tableau CRM based on data from the two separate Salesforce orgs.

How can an Tableau CRM consultant help UC achieve this?

A	Use Dataset Builder to create a single dataset in Org 1 based on Salesforce data in Org 2.	Incorrect. The Dataset Builder only works if the data is from the same org.
B	Extract the Salesforce data from Org 1 using Dataloader, then use the Tableau CRM Connector for Excel in Org 2.	Incorrect. This method will not keep the data in sync.
C	Use the Tableau CRM Connector to join the two orgs' data.	Correct. This method syncs the data from both orgs within Tableau CRM.
D	Enable Data Sync in your org to join the two orgs' data.	Incorrect. Enabling Data Sync will not allow sync between two different orgs.

Question 2

Which two statements about Tableau CRM datasets are correct?

A	When Tableau CRM loads dates into a dataset, it breaks up each date into multiple fields, such as day, week, month, quarter, and year, based on the calendar year.	Correct. Once the dataset is created, you can view or edit the attributes for each field on the Edit Field Attributes screen.
B	Datasets cannot be created based on data from one or more related Salesforce objects.	Incorrect. Multiple datasets can be created based on Salesforce Objects.
C	When loading data into a dataset, and no default value is specified, Tableau CRM forces you to indicate a default value so there are no blanks on the dataset.	Incorrect. The key identifier in the dataset (such as record Id) cannot be empty, but there can be other empty fields.
D	Use the upload user interface to create a single dataset based on external .csv data.	Correct. A dataset can be created from a .csv file.

Question 3

In which two use cases would an Tableau CRM consultant use Data Recipes?

A	To perform transformations like combining data from multiple datasets or connected objects.	Correct. To combine data from multiple datasets, you create a recipe and determine the shared key value for each dataset referenced in the recipe.
B	To bucket data and add formula fields.	Correct. To group data together into buckets, you use a recipe to create the buckets and select which data should be included.
C	To translate certain columns of dataset depends on the user's location.	Incorrect. Labels can be translated, but the data is not translated in Tableau CRM.
D	To mass update fields included in the dataset with a formula field created on the recipe.	Incorrect. A recipe is a saved set of transformations, or steps, that you want to perform on a specific source dataset or connected data. You cannot mass update fields with dataset recipes.

Question 4

An Tableau CRM consultant decides to turn on Data Sync in Tableau CRM. In which way can Data Sync optimize the dataflows?

A	Data Sync does not optimize dataflows, since dataflows have this functionality built in.	Incorrect. This functionality is not built in. Data sync optimizes the extraction of Salesforce data from a user's dataflows.
B	Data Sync runs just before the dataflow, which provides live data for the user.	Incorrect. The data extracted into a data sync or data flow is a copy of live data. By being a copy, the data in the data sync and dataflows is not considered live.
C	Dataflows run just after the data sync, which allows the dataflow to load fast, and then update the necessary values.	Incorrect. Schedule the data sync to run after a data flow. By scheduling sync ahead of time, the user's dataflow has less to do and runs faster.
D	Data Sync will decouple the extract of Salesforce data from the dataflows and sync this data in Tableau CRM on a separate schedule.	Correct. The update to the data happens incrementally versus pulling all the data each time.

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

Scenario 1	Learn how to bring in data from multiple Salesforce organizations by reviewing Connect and Sync Your Data to Tableau CRM .
Scenario 2	Study up on how to Upload a CSV File to Create a Dataset and reviewing Handle Date Values to learn how Tableau CRM loads data into datasets.
Scenario 3	Review Transformations for Data Prep Recipes to learn how to combine data from multiple datasets and apply transformations.
Scenario 4	Describe how data sync optimizes your data flow by reviewing Stage Your Data for Recipes and Dataflows with Data Sync .

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 maximum number of dataflow and recipe runs in a rolling 24- hour period?	60
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Card 2

What data flow transformation would you use to combine rows from multiple datasets together into a single dataset?	Append
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Card 3

What API can you use to retrieve or update recipes, retrieve a list of dataset versions, and access XMD information?	Tableau CRM REST API
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Card 4







What data transformation would you use to generate a dataset based on a Salesforce object?	sfdcDigest
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Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Refresh your knowledge on dataflow limits by reviewing Tableau CRM Limits .
Flashcard 2	Discover how to combine rows of multiple datasets into one dataset by learning about append Transformation .
Flashcard 3	Study Tableau CRM REST API Overview to learn all the ways to use this API.
Flashcard 4	Discover how to use transformations by reading Transformations for Tableau CRM Dataflows .

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Integrate Local and Remote Data in Tableau CRM	Project
 Tableau CRM Basics	Module
 Tableau CRM Data Integration Basics	Module
 Accelerate Tableau CRM with Apps	Trail
 Explore with Tableau CRM	Trail
 Tableau CRM Data Preparation Specialist	Superbadge

Resources

- [Salesforce Help: Prepare and Load Data into Datasets with Recipes and Dataflows](#)
- [Salesforce Help: Verify the Incremental Sync Settings for Salesforce Data](#)
- [Salesforce Help: Manage Datasets](#)
- [Salesforce Help: Integrate Data into Tableau CRM Datasets](#)
- [Salesforce Release Notes: Create and Run More Dataflows, and Track Usage with the Flow Indicator](#)
- [Salesforce Release Notes: Avoid Data Drift with Periodic Full Sync](#)
- [Tableau CRM External Data API Developer Guide: External Data](#)

Unit 3: Refresh Your Admin Skills

Learning Objectives

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

- Manage migration from sandbox to production orgs.
- Manage dataset extended metadata (XMD) by affecting labels, values, and colors.
- Improve dashboard performance by restructuring the dataset and data using lenses, pages, and filters.
- Enable Tableau CRM, options, and access as expected.

Key Topics

This unit prepares you for the Admin section of the Salesforce Tableau CRM and Einstein Discovery Consultant exam, which makes up 9% of the overall exam. This section of the exam tests these topics.

- Metadata migration from sandbox to production
- Dataset extended metadata (XMD)
- Dashboard performance improvement
- Tableau CRM enablement and access

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 Admin section of the 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 Admin section of the exam.

Exam Practice Questions



Question 1

A Tableau CRM consultant wants to determine the first day of the week, customize the display labels of fields, and customize colors of charts based on field values.

How can the consultant achieve this?

A	By using extended metadata (XMD) to customize the formatting of dataset fields and their values in Tableau CRM dashboards and lenses.	Correct. Extended metadata (XMD) enables you to modify dataset fields and their values.
B	Create a custom dashboard, and change the attributes in dashboard designer.	Incorrect. Modifying the labels, days of the week, and customizing colors is not possible through dashboard designer.
C	Edit the dataset JSON.	Incorrect. The JSON defines the components of the dashboard and how they interact.
D	Use Tableau CRM REST API to modify these attributes.	Incorrect. REST API does not allow users to modify these attributes.

Question 2

A Tableau CRM consultant notices their dashboard takes too long to load Salesforce data. What can an Tableau CRM user do to improve dashboard performance?

A	Run the dashboard from the data that was imported from an Excel sheet.	Incorrect. The dashboard performance is not dependent upon what format the data was used to create the dataset.
B	Run an efficiency check on the entire org through Tableau CRM to ensure everything is running efficiently.	Incorrect. Running an efficiency check on the entire org through Tableau CRM is not currently a feature.
C	Run the dashboards in a separate org, and then reconnect the dashboard to the initial org.	Incorrect. Running a dashboard in a separate org would separate it from the data.
D	Run a performance check on the dashboard and its queries to ensure that everything is running optimally.	Correct. When a dashboard design is complete, you run a performance check to ensure the queries and lenses are running optimally.

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

Scenario 1	Learn how to change attributes within a dataset by reviewing Format Measures and Display Elements with Tableau CRM Extended Metadata (XMD) .
Scenario 2	Understand the value of running optimization checks on dashboards and queries by studying Optimize Dashboard Performance .

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

Which Tableau CRM components can you deploy on a change set?	Tableau CRM applications, dashboards, dataflows, datasets, lenses, recipes, and master user XMD. All components start with "Analytics."
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Card 2



What permission provides Tableau CRM administrator-level capabilities?	Manage Tableau CRM
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Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Study Migrate Tableau CRM Assets with Change Sets to learn how to move customized Tableau CRM assets.
Flashcard 2	Review Learn About Tableau CRM Permission Set Licenses and User Permissions to learn what permissions are needed for admin-level access in Tableau CRM.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Tableau CRM Apps Basics	Module
 Build and Administer Tableau CRM	Trail

Resources

- [Salesforce Help: Set Up the Tableau CRM Platform](#)
- [Salesforce Help: Deploy Tableau CRM Prebuilt Apps](#)
- [Salesforce Help: Tableau CRM Encryption](#)
- [Salesforce Help: Deploy Your Changes](#)
- [Salesforce Help: Tableau CRM Distribution and Packaging](#)
- [Salesforce Help: Tableau CRM Limitations](#)
- [Salesforce Help: Verify the Incremental Sync Settings for Salesforce Data](#)
- [Salesforce Release Notes: Avoid Data Drift with Periodic Full Sync](#)
- [Analytics Templates Developer Guide: Introducing Analytics Templates](#)