Salesforce CRM Analytics and Einstein Discovery Consultant Certification Study Guide

Topic 3: Administration (11% Exam Weight)

Introduction to Administration

The **Administration** topic, weighted at 11%, is a pivotal component of the Salesforce CRM Analytics and Einstein Discovery Consultant certification. This section assesses the ability to manage and maintain the CRM Analytics environment, ensuring it operates efficiently, scales effectively, and supports users in their analytics tasks. Administration encompasses user management, app administration, and system monitoring—tasks that keep the platform running smoothly and aligned with organizational needs. A consultant must master these skills to onboard users, organize analytics assets, troubleshoot issues, and optimize performance, making this topic essential for operational success.

Importance of Administration

- **System Reliability**: Ensures data syncs, dashboards, and datasets function without disruption, minimizing downtime.
- **User Enablement**: Provides users with appropriate access and tools, enhancing adoption and productivity.
- **Performance Optimization**: Maintains system health to handle growing data volumes and user bases efficiently.
- **Governance**: Establishes processes for managing assets and monitoring usage, supporting compliance and auditability. An inadequately administered CRM Analytics environment risks sync failures, user frustration, and degraded performance, undermining the value of analytics insights.

Exam Objectives for Administration

While the Salesforce Exam Guide does not explicitly list sub-objectives, the scope of the Administration topic implies the following key focus areas:

1. Manage user onboarding, permissions, and offboarding within CRM Analytics.
2. Administer apps, including creation, customization, and asset management.
3. Monitor system performance, troubleshoot issues, and maintain data syncs and workflows. This guide will explore these areas with exhaustive depth, equipping

candidates with everything needed to excel in the 11% of the exam dedicated to Administration.

Key Concepts and Subtopics: A Comprehensive Breakdown

The Administration topic is divided into three critical areas: **User Management**, **App Administration**, and **Monitoring and Troubleshooting**. Each is dissected below with granular explanations, step-by-step configurations, extensive examples, practical scenarios, troubleshooting insights, and best practices to provide a thorough understanding.

1. User Management

- **Definition**: User Management involves onboarding new users, assigning appropriate licenses and permissions, updating access as roles change, and offboarding users when they leave, all within the CRM Analytics ecosystem.
- **Significance**: Ensures users have the right level of access to perform their roles—whether viewing dashboards or building datasets—while maintaining security and license efficiency.
- **Mechanics**:
    - **Licenses**: CRM Analytics licenses (e.g., Growth, Plus, Einstein Discovery) determine base access to features.
    - **Permission Sets**: Fine-tune capabilities (e.g., "CRM Analytics User" for viewing, "CRM Analytics Admin" for managing).
    - **Profiles**: Optionally used for bulk assignments, though permission sets are preferred for analytics-specific roles.
- **Detailed Configuration Steps**:

1. **Onboarding New Users**:
    - Navigate to Setup > Users in Salesforce.
    - Create or edit a user (e.g., "Sarah Lee, Sales Rep").
    - Assign a CRM Analytics license:
        - Go to "License Assignment" section.

        - Select “CRM Analytics Growth” for basic access or “Plus” for advanced features.
        - Save.
    - Assign Permission Set:
        - Go to Setup > Permission Sets.
        - Select “CRM Analytics User” (view/use analytics).
        - Click “Manage Assignments,” add user (e.g., “Sarah Lee”), save.

2. **Updating Permissions**:
    - Edit user (e.g., promote “Sarah Lee” to analyst).
    - Update license to “CRM Analytics Plus” if needed.
    - Add “CRM Analytics Admin” permission set for full access.
3. **Offboarding Users**:
    - Deactivate user in Setup > Users > Edit > Uncheck “Active.”
    - Remove CRM Analytics license to free it for reassignment.
    - Remove from permission sets via “Manage Assignments.”
4. **Verification**:
    - Log in as the user (e.g., via sandbox) to confirm access (e.g., “Sarah Lee” sees Analytics Studio but not Data Manager unless Admin).

- **Customization Options**:
    - **Bulk Onboarding**: Use Data Loader or Flow to assign licenses/permission sets to multiple users (e.g., 100 new reps).
    - **Custom Permission Sets**: Create “Dashboard Creator” with specific permissions (e.g., Edit on Dashboards, Read on Datasets).
- **Troubleshooting Tips**:
    - **User Can’t Log In**: Check license (e.g., missing “CRM Analytics Growth”) or Salesforce user status (e.g., inactive).

    - **Access Denied**: Verify permission set assignment (e.g., “CRM Analytics User” missing) or license type (e.g., Growth lacks Admin features).
- **Best Practices**:
    - Automate onboarding/offboarding with Flows (e.g., trigger on “New Hire” record creation).
    - Maintain a user access log (e.g., custom object “Analytics Users” with license/permission history).
    - Review license usage monthly (Setup > Installed Packages > Manage Licenses) to optimize costs.
- **Practical Example**: A retail chain manages 200 users:
    - **Scenario**: Onboard 50 new agents, update 10 to analysts, offboard 5 leavers.
    - **Action**:
        - Agents: Assign “CRM Analytics Growth” + “CRM Analytics User” to 50 users via Data Loader.
        - Analysts: Update 10 users to “CRM Analytics Plus” + “CRM Analytics Admin.”
        - Offboard: Deactivate 5 users, reclaim licenses.
    - **Outcome**: Agents view dashboards, analysts manage assets, licenses reused efficiently.

2. App Administration

- **Definition**: App Administration involves creating, customizing, and managing CRM Analytics apps—containers that organize dashboards, datasets, lenses, and other assets for specific business units or purposes.
- **Significance**: Well-administered apps streamline access to analytics, improve user experience, and maintain an organized environment, especially in large organizations with multiple teams.
- **Mechanics**:
    - **Apps**: Logical groupings of analytics assets (e.g., “Sales App” for sales team dashboards).

- **Sharing**: Controlled via Viewer, Editor, and Manager roles (overlaps with Security topic).
- **Asset Management**: Add, remove, or update contents (e.g., datasets, dashboards).

- **Detailed Configuration Steps**:

1. **Create an App**:
    - In Analytics Studio, click “Create” > “App.”
    - Enter details:
        - Name: “Support Analytics App.”
        - Description: “Analytics for support team KPIs.”
        - Template: Choose “Blank” or a prebuilt template (e.g., “Service Analytics”).
    - Save and open the app.
2. **Add Assets**:
    - In the app, click “Add Asset.”
    - Select types:
        - Datasets (e.g., “Closed Cases”).
        - Dashboards (e.g., “Support KPI Dashboard”).
        - Lenses (e.g., “Case Volume Lens”).
    - Save changes.
3. **Customize App**:
    - Edit app settings:
        - Thumbnail: Upload a custom image (e.g., support team logo).
        - Default Page: Set “Support KPI Dashboard” as landing page.
    - Reorder assets for usability (e.g., dashboards first).
4. **Share App** (ties to Security)**:
    - Click “Share”:

        - "Support Team" role = Viewer (view assets).
        - "Analysts" group = Editor (modify assets).
        - "Admins" = Manager (full control).
    - Save and notify users.

5. **Archive Unused Apps**:
    - In Analytics Studio > All Items, select an old app (e.g., "Legacy Sales App").
    - Click "Archive" to remove from active use (still recoverable if needed).

- **Customization Options**:
    - **Tabs**: Add custom tabs within the app (e.g., "KPI Tab," "Trends Tab") via JSON editing.
    - **Branding**: Apply org colors/fonts via CSS overrides (advanced, via Analytics SDK).
- **Troubleshooting Tips**:
    - **Assets Missing**: Ensure datasets/dashboards are added to the app (e.g., "Closed Cases" not linked).
    - **Users Can't See App**: Check sharing settings (e.g., user not in "Viewer" list).
- **Best Practices**:
    - Create one app per business unit (e.g., "Sales App," "Support App") for clarity.
    - Use descriptive names and thumbnails to aid navigation.
    - Archive obsolete apps quarterly to declutter Analytics Studio.
- **Practical Example**: A telecom company administers a "Customer Service App":
    - **Scenario**: App for CS team with case dashboards and datasets.
    - **Action**:
        - Create "Customer Service App," add "Case Trends Dashboard" and "Case Data" dataset.
        - Share: CS team = Viewer, analysts = Editor.

        - Set “Case Trends” as default page.
    - **Outcome**: CS team accesses key metrics in one place, analysts refine content.

3. Monitoring and Troubleshooting

- **Definition**: Monitoring and Troubleshooting involve overseeing system performance, ensuring data syncs and jobs run successfully, and resolving issues like failed dataflows or slow dashboards.
- **Significance**: Proactive monitoring prevents disruptions, while effective troubleshooting minimizes downtime and maintains trust in analytics outputs.
- **Mechanics**:
    - **Monitoring**: Use Data Manager to track syncs, dataflows, and recipes (e.g., “Last Run” status).
    - **Logs**: Detailed error messages in Data Manager pinpoint issues (e.g., “Connection timed out”).
    - **Performance**: Assess query speed, dataset size, and user feedback for optimization.
- **Detailed Configuration Steps**:

1. **Monitor Jobs**:
        - In Analytics Studio > Data Manager > Monitor tab.
        - View “Recent Jobs” (e.g., “Orders Dataflow,” “Sales Recipe”).
        - Check status:
            - Success: “Completed: 10,000 rows processed.”
            - Failed: “Error: Invalid credentials.”
2. **Review Logs**:
        - Click a failed job (e.g., “Orders Dataflow”).
        - Read log details (e.g., “Error at Node ‘sfdcDigest’: OAuth token expired”).
        - Export logs for audit (CSV format).

3. **Troubleshoot Issues**:
    - **Sync Failure**: Re-authenticate connection (e.g., refresh OAuth in Data Manager > Connections).
    - **Dataflow Error**: Edit JSON (e.g., fix syntax in filter node), rerun.
    - **Slow Dashboard**: Optimize dataset (e.g., remove unused fields in Data Manager > Datasets).
4. **Set Notifications**:
    - In Data Manager > Settings > Notifications.
    - Enable email alerts for job failures (e.g., "Notify admin@company.com").
5. **Performance Tuning**:
    - Check dataset size (e.g., "Sales Data" = 5M rows).
    - Reduce rows/columns if slow (e.g., filter to 1M rows in Recipe).
    - Test dashboard load time (e.g., aim for <5 seconds).

- **Customization Options**:
    - **Custom Alerts**: Use Flow to send Chatter posts on failures (e.g., "Dataflow X failed" to "Admins" group).
    - **Performance Dashboards**: Build an admin dashboard tracking sync times, error rates.
- **Troubleshooting Tips**:
    - **Sync Stuck**: Check schedule (e.g., "Last Run: Never" = not scheduled), force manual run.
    - **Error Vague**: Cross-check source data (e.g., Salesforce field deleted), update Dataflow.
    - **Dashboard Lags**: Profile queries in Analytics Studio > Lenses, optimize SAQL.
- **Best Practices**:
    - Schedule daily monitoring (e.g., 15-minute admin review of Data Manager).

    - Log all issues with resolution steps (e.g., custom object “Analytics Issues”).
    - Preempt failures by testing syncs post-config (e.g., after credential updates).
- **Practical Example**: A logistics firm monitors “Shipments” sync:
    - **Scenario**: Daily sync fails, dashboard loads slowly.
    - **Action**:
        - Monitor: Data Manager shows “Failed: Connection timeout.”
        - Troubleshoot: Reconnect API in Connections, rerun sync (success, 1,000 rows).
        - Optimize: Reduce “Shipments” dataset from 10M to 2M rows, dashboard loads in 3 seconds.
    - **Outcome**: Sync restored, performance improved.

Scenario Example: Comprehensive Administration Design

Scenario: A retail chain needs to administer its CRM Analytics environment for 300 users (250 agents, 40 managers, 10 analysts), deploy a “Sales Performance App,” and monitor daily data syncs for “Orders” and “Inventory” datasets.

- **Requirements Breakdown**:
    - **Users**: Onboard 250 agents (view access), 40 managers (view access), 10 analysts (full access).
    - **App**: “Sales Performance App” with dashboards and datasets for sales team.
    - **Monitoring**: Daily syncs for “Orders” (Salesforce) and “Inventory” (external), troubleshoot failures.
- **Solution Design**:
    - **User Management**:
        - **Agents**:
            - Assign “CRM Analytics Growth” license + “CRM Analytics User” permission set to 250 users.

        - Setup: Use Data Loader to bulk assign licenses/permission sets (CSV with User IDs).
    - **Managers**:
        - Assign “CRM Analytics Growth” + “CRM Analytics User” to 40 users.
        - Setup: Manual assignment in Setup > Users.
    - **Analysts**:
        - Assign “CRM Analytics Plus” + “CRM Analytics Admin” to 10 users.
        - Setup: Setup > Users > Edit > Assign licenses/permission sets.
    - **Verification**: Test logins—agents see Analytics Studio, analysts see Data Manager.
    - **Offboarding Plan**: Deactivate leavers, reclaim licenses via Setup > Users.
- **App Administration**:
    - **Create App**:
        - In Analytics Studio > Create > App > “Sales Performance App.”
        - Add assets: “Sales KPI Dashboard,” “Orders” dataset, “Revenue Trends Lens.”
        - Customize: Set “Sales KPI Dashboard” as default, upload company logo.
    - **Share**:
        - “Sales Team” role = Viewer (250 agents + 40 managers).
        - “Analysts” group = Editor (10 analysts).
        - “Admins” = Manager.
    - **Verification**: Manager logs in, sees app with dashboards, can’t edit; analyst can modify.
- **Monitoring and Troubleshooting**:

        - **Sync Setup**:
            - "Orders" (Salesforce): Incremental sync daily at 1 AM (Data Manager > Connections > Schedule).
            - "Inventory" (external CSV): Full sync daily at 2 AM (Data Manager > Recipes > Schedule).
        - **Monitor**:
            - Check Data Manager > Monitor daily at 9 AM.
            - Example: "Orders" succeeds (5,000 rows), "Inventory" fails ("File not found").
        - **Troubleshoot**:
            - Fix "Inventory" by uploading updated CSV, rerun sync (2,000 rows added).
            - Set email alert for failures (admin@retail.com).
        - **Performance**: "Sales KPI Dashboard" loads in 6 seconds—optimize "Orders" dataset by removing "Order Notes" field, reducing to 4 seconds.
    - **Outcome**:
        - 300 users access analytics per role.
        - "Sales Performance App" organizes assets for sales team.
        - Daily syncs run reliably, issues resolved quickly.

Exam-Focused Insights and Strategies

- **Common Questions**:
    - **Scenario-Based**: "A company needs to onboard 100 users and monitor a daily dataflow. Design the admin process." (Answer: Bulk assign licenses, schedule dataflow, set notifications.)
    - **Tool Selection**: "When should you archive an app?" (Answer: When it's obsolete or unused to declutter.)

    - **Troubleshooting**: “A sync fails with ‘Invalid Token.’ What’s the fix?” (Answer: Re-authenticate connection in Data Manager.)

- **Key Memorization**:
    - Licenses: Growth (view), Plus (build), Einstein Discovery (AI).
    - App Roles: Viewer, Editor, Manager.
    - Data Manager Tabs: Connect, Datasets, Monitor.
- **Practical Tips**:
    - Practice in a Sandbox: Onboard 5 users, create an app, monitor a failed sync, fix it.
    - Know Limits: 100 apps per org, 10M rows per dataset (adjust monitoring for scale).

Study Tips for Administration

1. **Hands-On Practice**:
    - Onboard 10 test users with different licenses/permission sets.
    - Create an app, add a dashboard/dataset, share with roles.
    - Schedule a sync, force a failure (e.g., wrong credentials), troubleshoot.
2. **Memorize Concepts**:
    - User Management: Licenses vs. Permission Sets.
    - App Structure: Assets, sharing, customization.
3. **Scenario Mastery**:
    - Solve: “Deploy a ‘Support App’ for 50 users, monitor daily case sync.”
4. **Trailhead Modules**:
    - “CRM Analytics Administration Basics”
    - “Manage Users in CRM Analytics”
5. **Test Edge Cases**:
    - Overload an app with assets, optimize.

- Break a dataflow (e.g., invalid node), debug logs.

Summary of Administration

This massive guide has delivered a comprehensive mastery of Administration in CRM Analytics. It has covered:

- Managing users through onboarding, permission updates, and offboarding with precise configurations.
- Administering apps by creating, customizing, and sharing them for organizational use.
- Monitoring system performance and troubleshooting issues like sync failures and slow dashboards.

This exhaustive resource ensures readiness for the 11% of the exam focused on Administration.