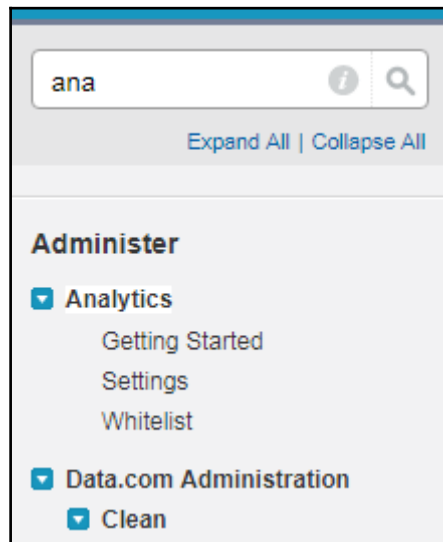
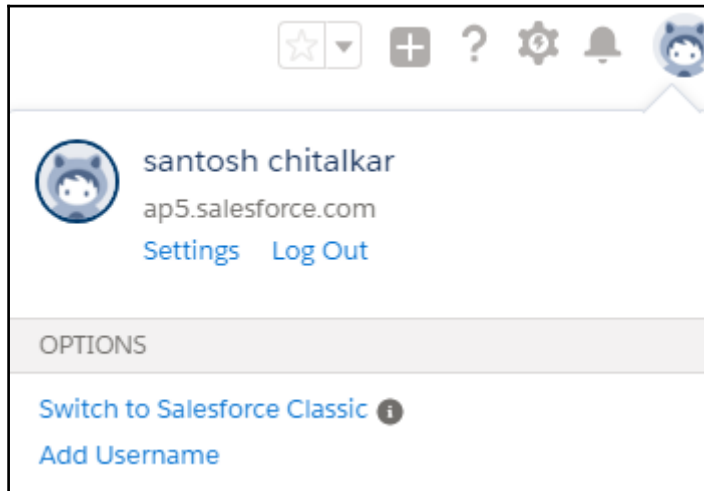


Chapter 1: Getting Started with Einstein Analytics

The screenshot shows a web browser window with the URL <https://developer.salesforce.com/promotions/orgs/analytics-de>. The page features the Salesforce Developers logo in the top left. The main content area is split into two sections. On the left, the heading "Learn Einstein Analytics with Trailhead" is displayed above an image of a desktop monitor, a tablet, and a smartphone, all showing various data visualizations like bar charts and pie charts. Below the image, a short paragraph reads: "Want to learn how to use Salesforce Einstein Analytics? Sign up for a free Einstein Analytics-enabled Developer Edition packed with sample data that". On the right, a blue sidebar contains the text "Get a Free Einstein Analytics-enabled Developer Edition - to learn new skills with Trailhead today." Below this text is a white registration form with the following fields: "Name" (split into "First" and "Last" text boxes), "Email" (a text box with the placeholder "Your email address"), "Role" (a dropdown menu with "Developer" selected), "Company" (a text box with the placeholder "Company Name"), "Country" (a dropdown menu with "United States" selected), and "Postal Code" (a text box).

Chapter 2: Setting Up Einstein Analytics



Salesforce Analytics

Launch Analytics

Usage Statistics

Records

3,789

of 250,000

Datasets

5

Administrator Support

- Analytics Glossary
- Analytics Setup
- Data Integration
- Analytics Data Security
- XMD 2.0 Converter

Administrator Tasks

- Add Users
- Assign Permission Set Licenses to Users
- Create Permission Sets
- Assign Permission Sets to Users
- Create Dashboard
- Review Limits



Disable Analytics

Quick Find / Search

Expand All | Collapse All

Lightning Experience Migration Assistant

Switch to the modern, intelligent Salesforce.

Get Started

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
 - Users
 - Adoption Manager
 - Mass Email Users
 - Roles
 - Permission Sets**
 - Profiles
 - Public Groups

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#)

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Del Clone	Wave Analytics Trailhead Admin	Wave Analytics Permissions for full Builder Access in the ...	
Del Clone	Wave Analytics Trailhead Explorer	Wave Analytics Permissions for Explorer Access (view on ...	

1-3 of 3 | 0 Selected | << Previous Next >>

Enter permission set information

Label

API Name [i](#)

Description

Session Activation Required [i](#)

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

Permission Set **Einstein Analytics User** [Video Tutorial](#) | [Help for this Page](#) [?](#)

Permission Set Overview

Description	API Name	Einstein_Analytics_User
License	Analytics Cloud Integration User	Namespace Prefix
Session Activation Required	<input type="checkbox"/>	
Created By	santosh chitalkar	1/18/2018 9:39 AM
Last Modified By	santosh chitalkar	1/18/2018 9:39 AM

Assigned Users **Einstein Analytics User** [Help for this Page](#) [?](#)

[Back to: Permission Set](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Full Name	Alias	Username	Last Login	Role ↑	Active	Profile	Manager
No records to display.							

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Assign Users Help for this Page ?

Active Users

View: Active Users | [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

<input type="checkbox"/>	Action	Full Name	Alias	Username	Last Login	Role ↑	Active	Profile	Manager
<input checked="" type="checkbox"/>	Edit	User_Integration	inteq	integration@00d7f000002cnmfuak.com	10/2/2017 11:19 PM		✓	Analytics Cloud Integration User	
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d7f000002cnmfuak.com			✓	Analytics Cloud Security User	
<input type="checkbox"/>	Edit	Chatter_Expert	Chatter	chatty.00d7f000002cnmfuak.2mhpr7bsr5s@chatter.salesforce.com			✓	Chatter Free User	
<input type="checkbox"/>	Edit	chitalkar_santosh	schit	santosh.chitalkar@gmail.com.einstein	1/18/2018 9:08 AM	CEO	✓	System Administrator	
<input type="checkbox"/>	Edit Login	Garza_Laura	lgarz	trailhead12_vpsxvirwommd@example.com		Sales.WW	✓	Standard User	

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Assignment Summary Help for this Page ?

Einstein Analytics User

✓ Permission set Einstein Analytics User has been assigned to 1 user.

[Done](#)

Full Name	Username	User License	Message
Integration User	integration@00d7f000002cnmfuak.com	Analytics Cloud Integration User	Success

[Done](#)

Profiles

All Profiles | [Edit](#) | [Delete](#) | [Create New View](#)

[New Profile](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P

<input type="checkbox"/>	Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Analytics Cloud Integration User
User License	Analytics Cloud Integration User
Profile Name	<input type="text" value="Analytics Cloud Clone"/>

>

Goal Links

Custom Object Permissions

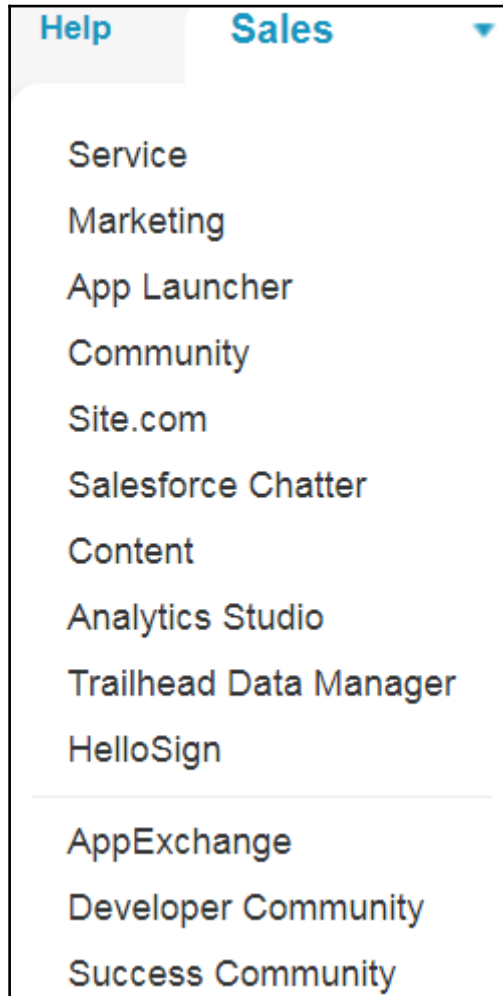
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Blogs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HelloSign Signer Roles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HelloSign for Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HelloSign Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HelloSign Logs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HelloSign Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HelloSign Signature Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HelloSign Uploaded Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HelloSign Signature Request Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Opportunity Histories	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Desktop Integration Clients

Choose whether users with this profile can use a client, update a client, see client update alerts, or be forced to update to the latest version. To set permissions for Salesforce for Outlook, use the **Manage Email Client Configurations** permission and define settings in Outlook configurations.


Offline On, updates w/o alerts

Chapter 3: Say Hello to Einstein




App Launcher Find an app or item [Visit AppExchange](#)


▼ All Apps




Service
Manage customer service with accounts, contacts, cases, and more




Marketing
Best-in-class on-demand marketing automation




Community
Salesforce CRM Communities




Site.com
Build pixel-perfect, data-rich websites using the drag-a... [More](#)




Salesforce Chatter
The Salesforce Chatter social network, including profile... [More](#)




Content
Salesforce CRM Content



Analytics Studio



Sales
Manage your sales process with accounts, leads, opportun... [More](#)



Trailhead Data Manager
Allows you to have meaningful training data to do the Wa... [More](#)

Analytics Studio


ANALYTICS
Recent
61 items Search Analytics...

ANALYTICS ALL APPS DASHBOARDS LENSES DATASETS


Recent

- Created by Me
- Shared with Me
- Pinned Apps
- Notifications


Apps




My Private App
Created by: santosh chitalkar
Created on:
[Run App](#)



Basic Sales Analytics App
Created by: santosh chitalkar
Created on:
Oct 2, 2017 at 11:15 PM
[Run App](#)



Shared App
Created by:
Created on:
Oct 2, 2017 at 10:15 PM
[Run App](#)



The Service App
Created by: santosh chitalkar
Created on:
Oct 3, 2017 at 8:10 AM
[Run App](#)

Analytics Studio

ANALYTICS
Recent
6 items

Search Apps...

Create

- App
- Dashboard
- Dataset

ANALYTICS

- Recent
- Created by Me
- Shared with Me
- Pinned Apps
- Notifications

My Private App
Created by: Santosh Chitalkar
Created on:
[Run App](#)

Sales App
Created by: Santosh Chitalkar
Created on:
Jun 11, 2017 at 11:03 PM
[Run App](#)

Hello App
Created by: Santosh Chitalkar
Created on:
Aug 31, 2017 at 10:53 PM
[Run App](#)

Choose Data Source

CSV File
Upload data from a CSV file directly into a dataset.

Salesforce
Create a dataset from Salesforce objects using the dataset builder.

Informatica Rev
Create a dataset from data prepared in Informatica Rev.

[Informatica Rev](#)

[Continue](#)

Select a file to upload

A .csv or other delimited flat file works. [Learn More](#)



Account_Data.csv ✕

Next

New Dataset ✕

Create a name and select an app for your dataset

Dataset Name

App

File Properties Detected

- Field Delimiter: , ▾
- Quote Character: "
- Escape Character: None
- Line Encoding: LF (Unix)
- File Encoding: UTF-8

Data Schema File

📄Account_Data.json ▾

Back

Next

New Dataset ✕

Create a name and select an app for your dataset

Dataset Name

App

File Properties Detected

Field Delimiter: ,

Quote Character: "

Escape Character: None

Line Encoding: LF (Unix)

File Encoding: UTF-8

Data Schema File

Account_Data.json
▼

Download File
Replace File

Back

Next

Analytics Studio

ANALYTICS

Recent

28 items

ANALYTICS

Recent

Created by Me

Shared with Me

Pinned Apps

Notifications

ALL APPS DASHBOARDS LENSES DATASETS

My Account Data

Created by: Santosh Chitalkar

Last Refreshed

Aug 30, 2017 at 12:37 AM

Account_Data

Created by: Santosh Chitalkar

Last Refreshed

Jan 13, 2018 at 11:08 PM

Accounts

Created by: Santosh Chitalkar

Last Refreshed

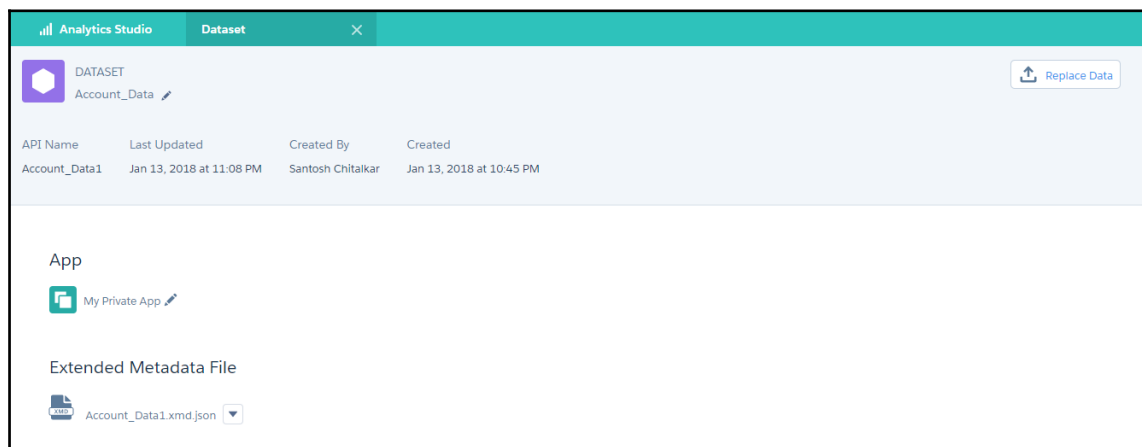
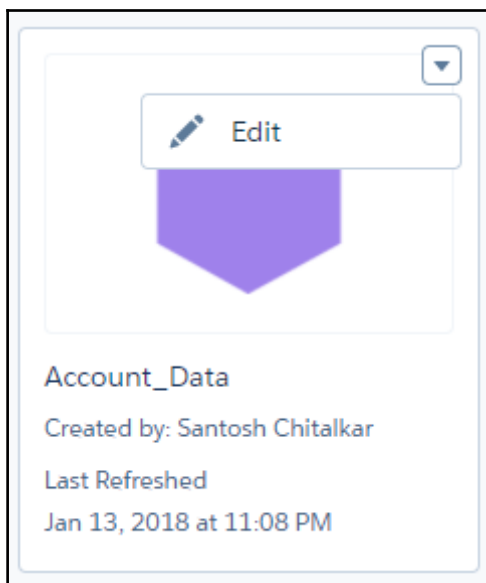
Nov 6, 2017 at 3:58 AM

MyUser

Created by: Santosh Chitalkar

Last Refreshed

Jun 16, 2017 at 2:54 AM



⚠️ Replace data?

Replacing dataset data may affect the following assets and any others that use this dataset

No dependencies

Are you sure you want to continue?

Analytics Studio

ANALYTICS
Recent
94 items

Search Analytics...

Create

App
Dashboard
Dataset

view All

ANALYTICS

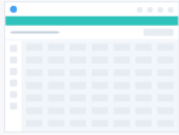
ALL APPS DASHBOARDS LENSES DATASETS

Recent


Apps

Created by Me


Choose a dashboard template✕



Blank Dashboard in the Dashboard Designer
Create a responsive dashboard with custom layouts for any device.



Comparison Dashboard
Compare metrics side-by-side, across a single dimension. Filter both columns of information using the filter sidebar.



Details Dashboard
Visualize your data with a chart and include record-level details in a table below. Include KPIs in the left panel and filters at the top.

BackContinue

Save

Title *

Description

App

Save

Analytics Studio Hello Dashboard

Wave Dashboard Designer Hello Dashboard Edit Dashboard

Default

Preview

General Settings

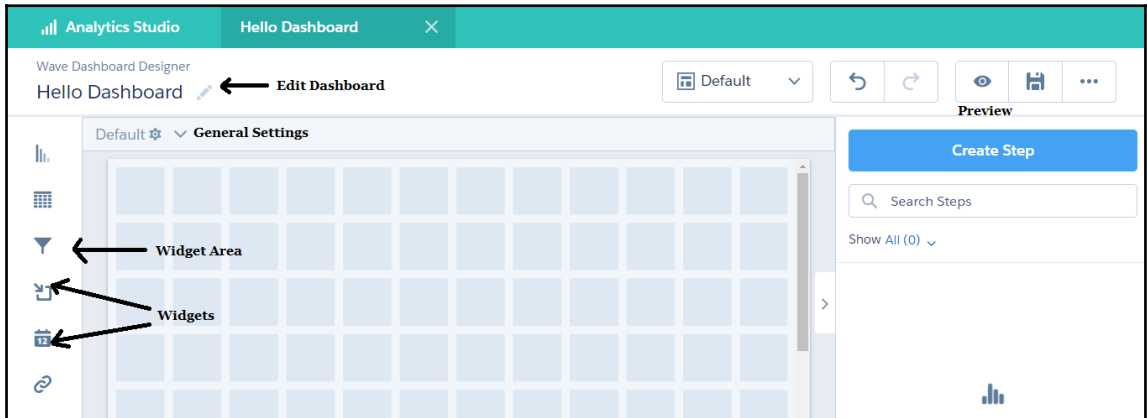
Widget Area

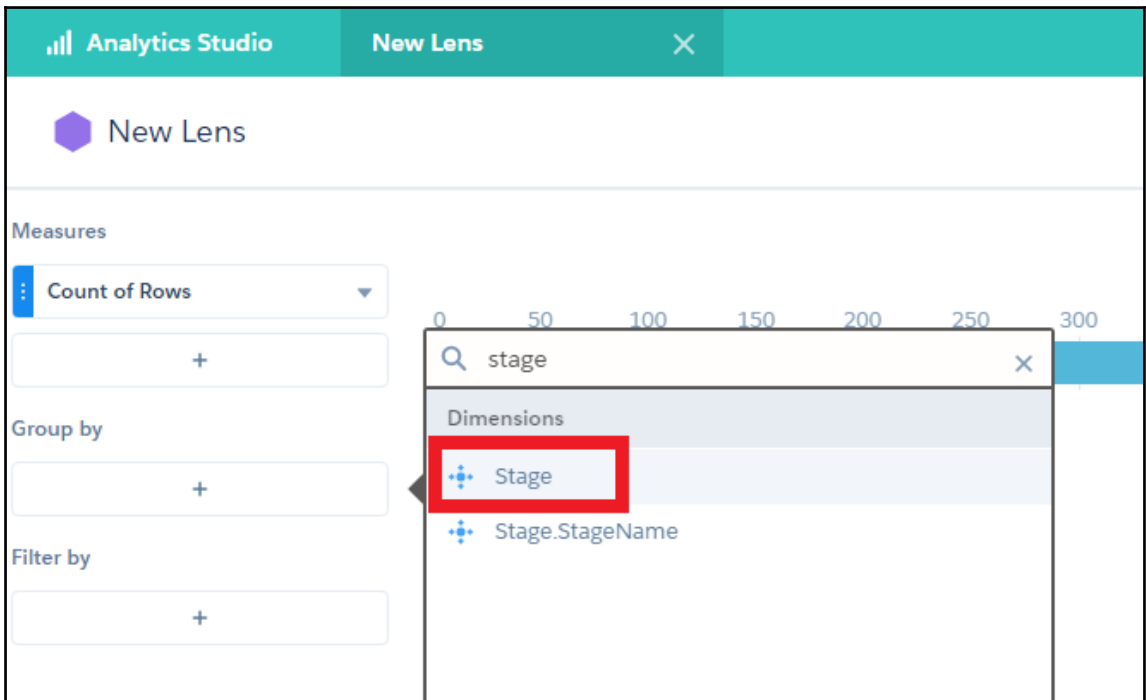
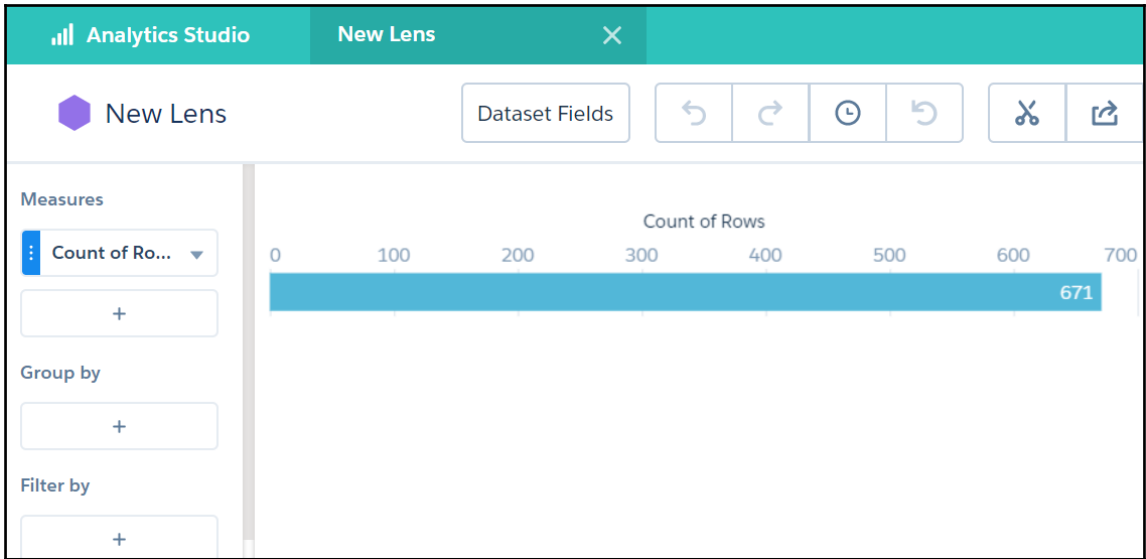
Widgets

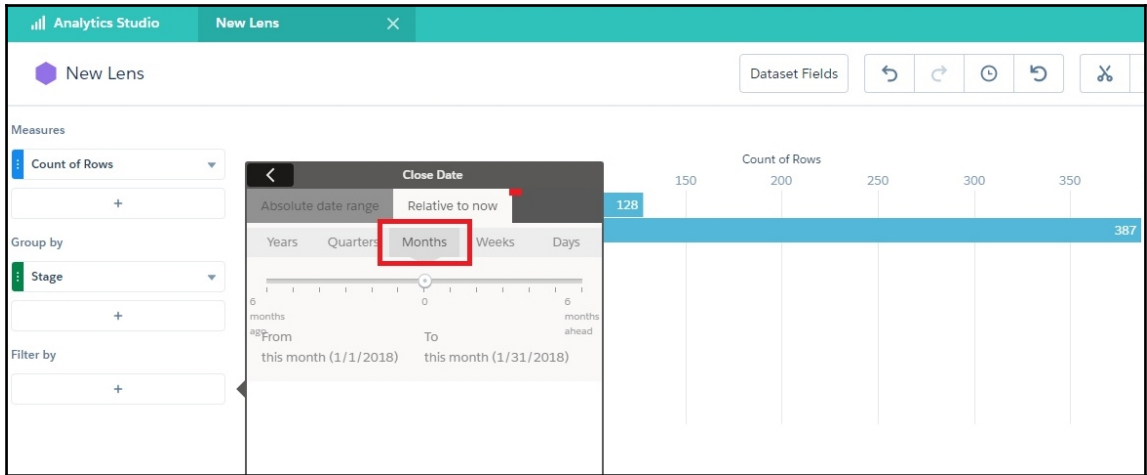
Create Step

Search Steps

Show All (0)







Save
✕

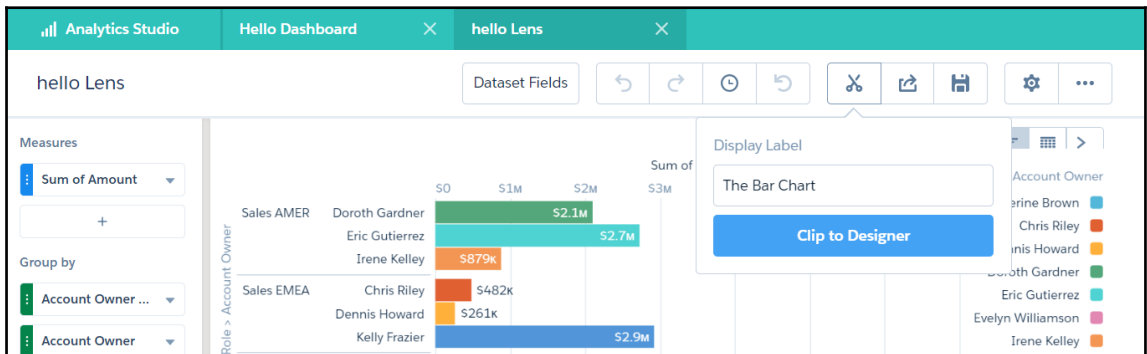
Title *

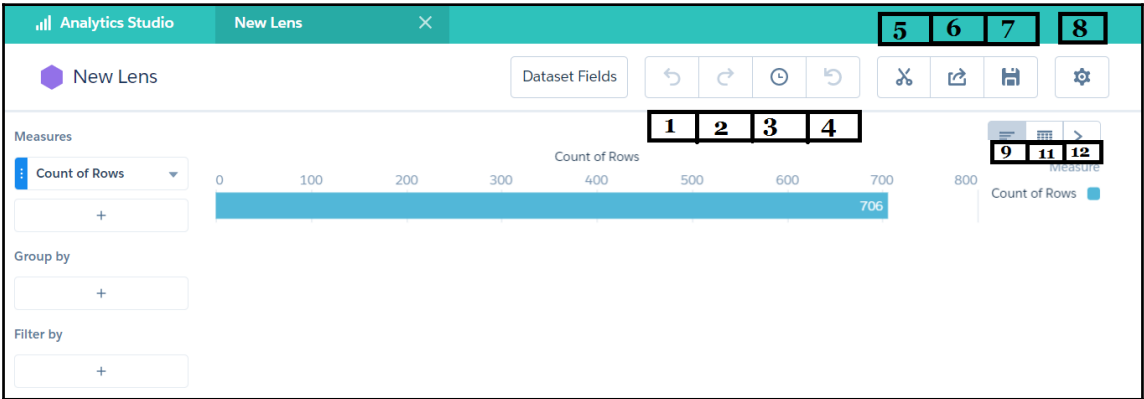
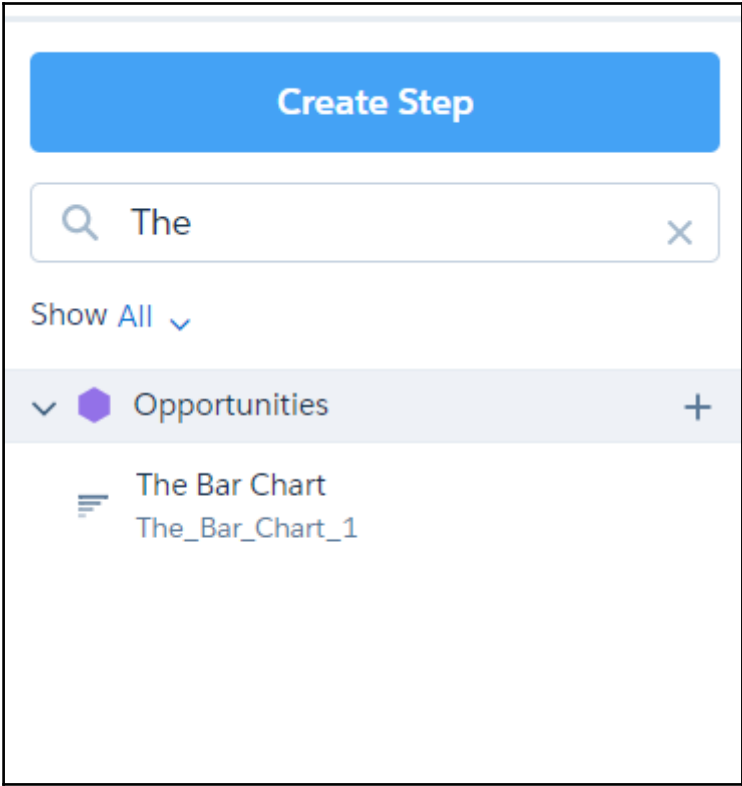
Description

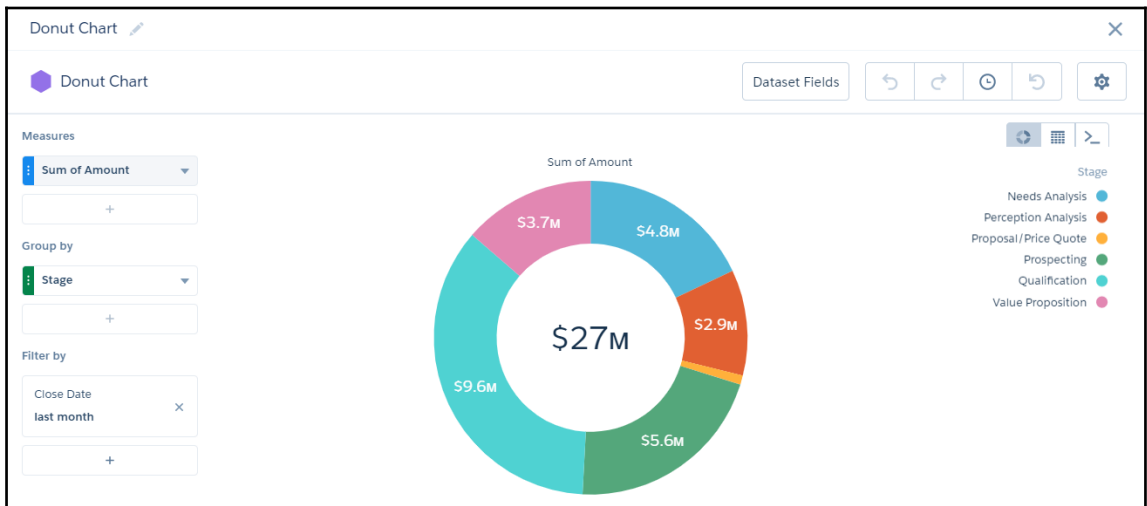
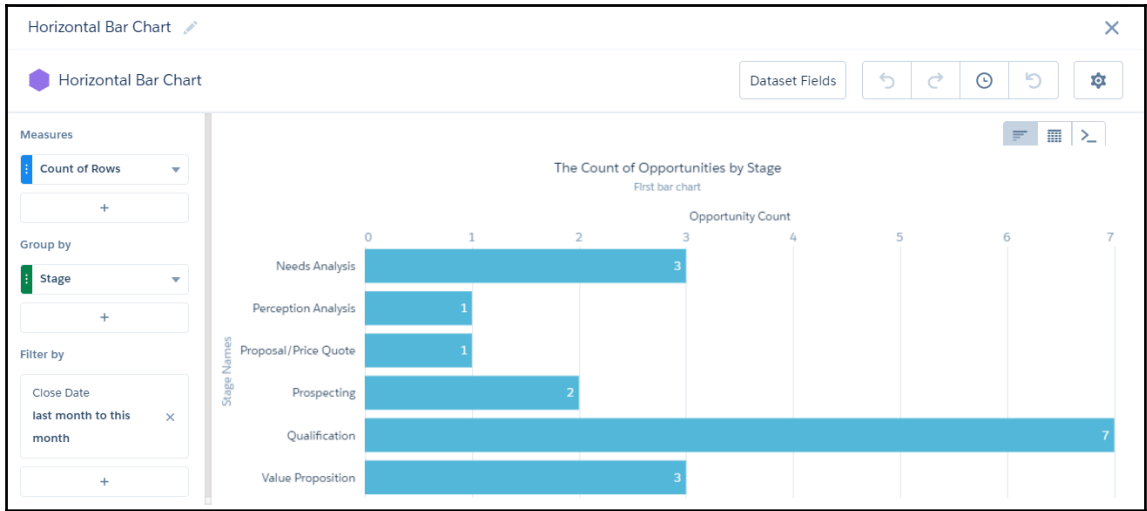
App

My Private App
▾

Save







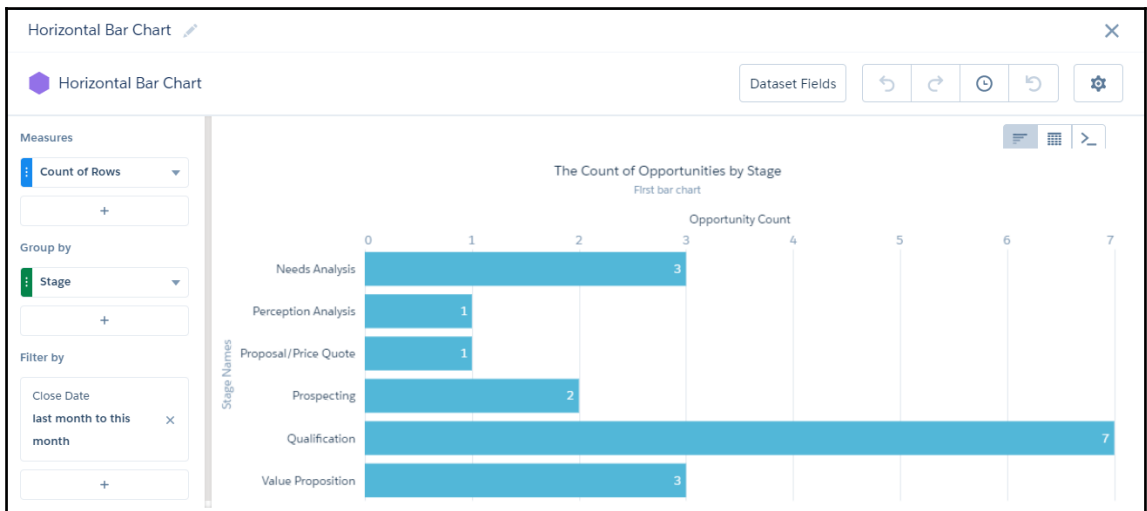
Compare Table

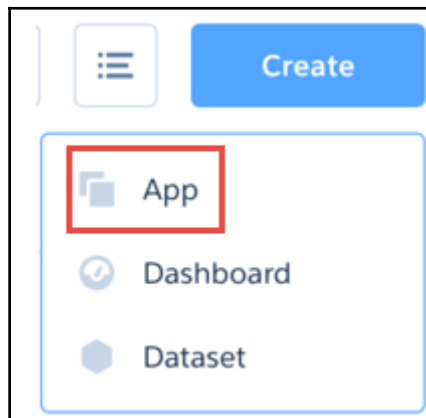
Compare Table Dataset Fields

Measures: Sum of Amount

Group by: Account Owner Role, Stage

Account Owner Role	Stage	Sum of Amount
CEO	Closed Lost	\$21,324,573
	Closed Won	\$24,429,074
Sales AMER	Closed Lost	\$32,769,943
	Closed Won	\$89,828,107
Sales EMEA	Closed Lost	\$43,511,277
	Closed Won	\$145,158,100
Sales WW	Closed Lost	\$50,127,133
	Closed Won	\$151,727,607






Analytics Browse Hello App

ALL DASHBOARDS LENSES DATASETS

Search Hello App... 0 results



Hello App

Add a description to provide context for those you share your app with!

Share

Delete

CREATED BY
Santosh Chitalkar
Aug 31, 2017 at 10:53 PM


Your app is a little lonely

Save any dataset, lens, or dashboard to **Hello App** and they'll show up here!

ANALYTICS
Hello App 

- ALL
- DASHBOARDS
- LENSES
- DATASETS
- DETAILS

Dashboards



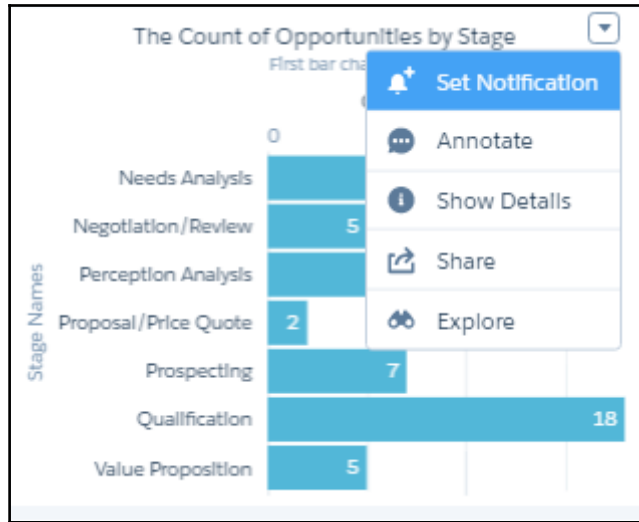
The Count of Opportunities by Stage


Stage	Count
Needs Analysis	10
Investigation Review	15
Proposal Review	12
Proposal Price Quote	8
Proposing	18
Qualification	20
Value Proposition	15

Stacked Bar


Category	Value 1	Value 2
1	100	200
2	150	250
3	200	300
4	250	350
5	300	400
6	350	450
7	400	500
8	450	550
9	500	600
10	550	650

Hello Dashboard
 Created by: Santosh Chitalkar
 Last Refreshed
 Jun 11, 2017 at 11:08 PM



← New Notification 

Notify me when the value

Equals 

Enter threshold value...


With these criteria

Filters: None

Notify me only the first time conditions are met

At this time

Frequency: Every Weekday
 Daily
 Weekly

Time: 12:00 AM 

Save Save and Run

My Analytics Apps | [Pin Apps](#) | [Browse All](#)



My DTC Sales



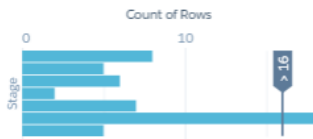
Shared App



Sales App

Notification Tracking

The Count of Opportunities by Stage



Chapter 4: Diving Deep into Einstein Analytics

New Dataset ✕

Create a name and select an app for your dataset

Dataset Name

File Properties Detected

- Field Delimiter: ,
- Quote Character: "
- Escape Character: None
- Line Encoding: CRLF (Windows)
- File Encoding: UTF-8

App

Data Schema File

Quick Find / Search.

Expand All | Collapse All

Lightning Experience Migration Assistant

Switch to the modern, intelligent Salesforce.

[Get Started](#)

Salesforce Mobile Quick Start

Force.com Home

User
Santosh Chitalkar

Edit Layout | User Profile | Help for this Page

[Permission Set Assignments \[5+\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set License Assignments \[4\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[0\]](#) | [OAuth Connected Apps \[19\]](#) | [Third-Party Account Links \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [Authentication Settings for External Systems \[0\]](#) | [Login History \[10+\]](#) | [User Provisioning Accounts \[0\]](#)

User Detail [Edit](#) [Sharing](#) [Change Password](#)

Name	Santosh Chitalkar	Role	CEO
Alias	SChit	User License	Salesforce
Email	santosh.chitalkar@gmail.com	Profile	System Administrator
Username	santosh.chitalkar@gmail.com.wave	Active	✓
Nickname	santosh.chitalkar	Marketing User	✓
Title		Offline User	✓
Company	PinakinTechnologies	Knowledge User	✓

18

Search... [Search](#) Santosh Chitalkar [Setup](#) [Help](#) [Sales](#)

[Home](#) [Chatter](#) [Accounts](#) [Contacts](#) [Leads](#) [Opportunities](#) [Products](#) [Files](#) [+](#)

ana

Expand All | Collapse All

Administer

- Analytics**
 - Getting Started
 - [Settings](#)
 - Whitelist
- Data.com Administration**
 - Clean**
 - Metrics & Analytics

Analytics Settings

Turn on additional Analytics features.

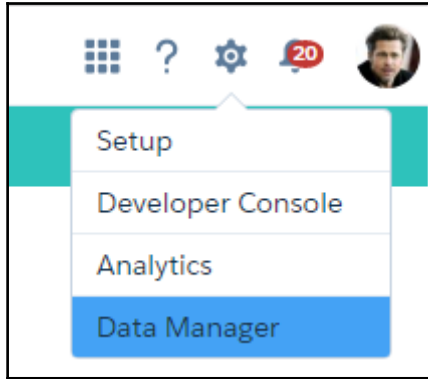
[Save](#)

Settings ! = Required Information

- Enable Replication**

Replication uses your existing dataflows to determine which objects and fields to replicate. When you enable replication, Analytics validates these dataflows and displays any errors it finds. Fix errors before you continue. Before you enable replication, read [Understand What Happens When You Enable Replication](#).

- Show preview thumbnails for secure lenses and dashboards**



Data Manager

Monitor

Dataflows & Recipes

Datasets

Setup

Dataflows & Recipes

Cleanse, transform, and combine data from multiple sources. [Create Dataflow](#)

DATAFLOWS DATASET RECIPES

	dasdasd Last Modified By: Santosh Chitalkar	Not Scheduled dasdasd · Run by Integration User
	Default Salesforce Dataflow Last Modified By: Santosh Chitalkar	Not Scheduled SalesEdgeEltWorkflow · Run by Integration User
	First Dataflow Last Modified By: Santosh Chitalkar	Not Scheduled First_Dataflow · Run by Integration User
	Sales App Summer 17 Last Modified By: Santosh Chitalkar	Not Scheduled Sales_App_Summer_17 · Run by Integration User
	Vitaly 1 Last Modified By: Santosh Chitalkar	Not Scheduled Vitaly_1 · Run by Integration User

Create A Dataflow

Name

Create

 Monitor

 Dataflows & Recipes

 Datasets

 Setup



Monitor

Track data jobs and dataflows.

Dataflow View



dasdasd

Last Modified By: Santosh Chitalkar



Default Salesforce Dataflow

Last Modified By: Santosh Chitalkar



First Dataflow

Last Modified By: Santosh Chitalkar

Data Manager

Monitor

- Dataflows & Recipes
- Datasets
- Setup

Monitor Data Tasks

Track data jobs and dataflows.

Dataflow View Last refresh: Today at 10:01 AM

+		Default Salesforce Dataflow Last Modified By: Santosh Chitalkar	SalesEdgeEitWorkflow · Run by Integration User	Not Scheduled
+		First Dataflow Last Modified By: Santosh Chitalkar	First_Dataflow · Run by Integration User	Not Scheduled
+		Sales App Summer 17 Last Modified By: Santosh Chitalkar	Sales_App_Summer_17 · Run by	

- Edit
- Download
- Upload
- Start
- Schedule
- Delete

Analytics

Browse × **Shared App** ×

ALL DASHBOARDS LENSES DATASETS

Search Shared App... 3 results

Shared App

Add a description to provide context for those you share your app with!

Share

Datasets

- Opportunities**
Santosh Chitalkar
Jun 16, 2017 at 2:54 AM
- Products Opportunities**
Santosh Chitalkar
Jun 16, 2017 at 2:54 AM
- My_Dataflow_Oppty**
Santosh Chitalkar
Today at 10:26 AM

Data Manager

Monitor

- Dataflows & Recipes
- Datasets
- Setup

Monitor Data Tasks

Track data jobs and dataflows.

Dataflow View ▼ Last refresh: Today at 10:01 AM

+		Default Salesforce Dataflow Last Modified By: Santosh Chitalkar	SalesEdgeEitWorkflow · Run by Integration User	Not Scheduled ▼
+		First Dataflow Last Modified By: Santosh Chitalkar	First_Dataflow · Run by Integration User	Not Scheduled ▼
+		Sales App Summer 17 Last Modified By: Santosh Chitalkar	Sales_App_Summer_17 · Run by	

- Edit
- Download
- Upload
- Start
- Schedule
- Delete

Schedule for 'First Dataflow' ✕

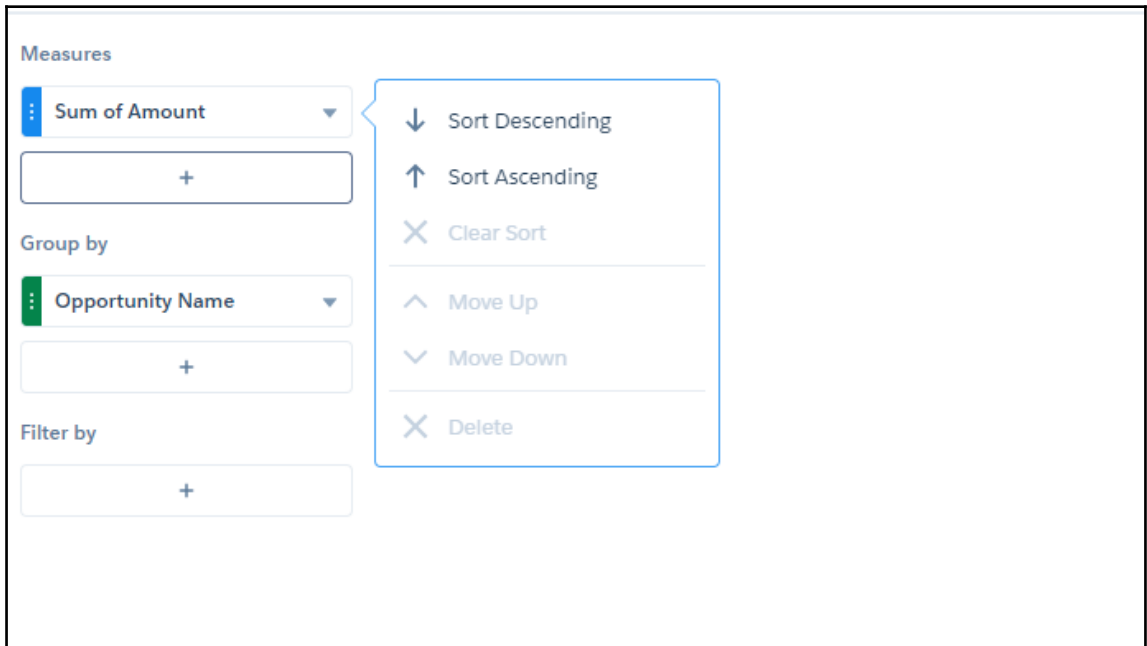
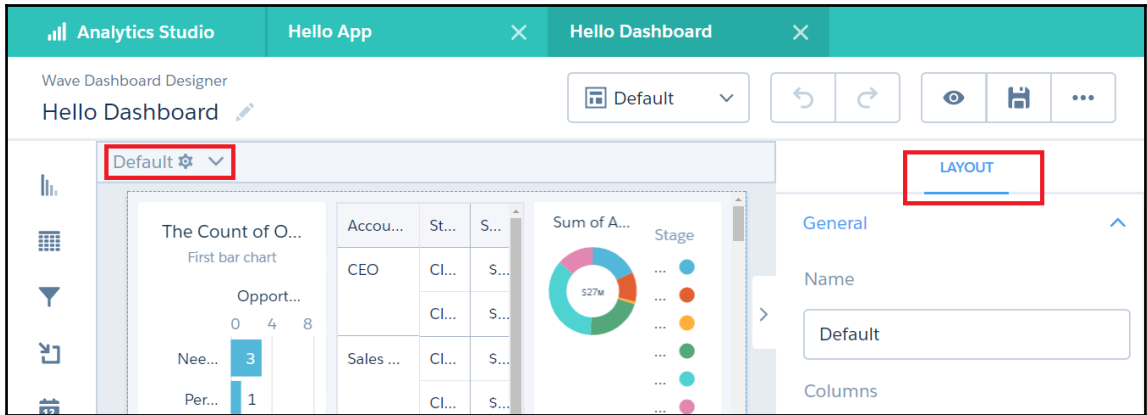
Schedule by Week ▾

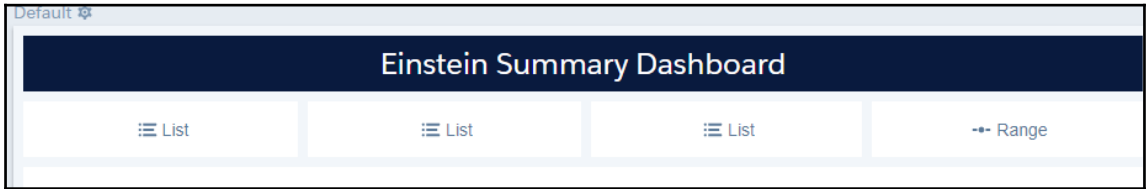
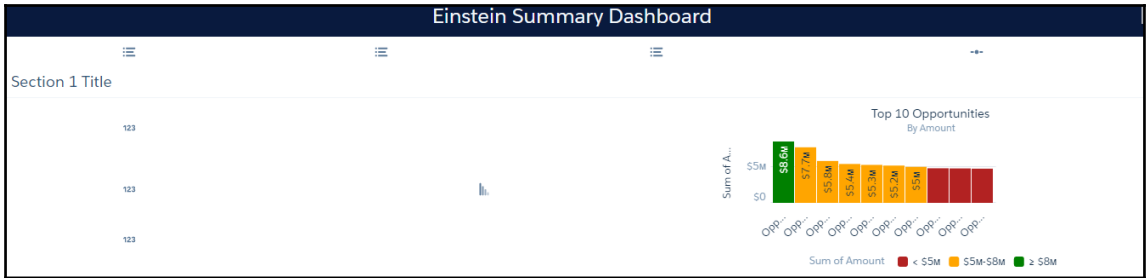
Start at 12:00 am ▾ America/Los_Angeles

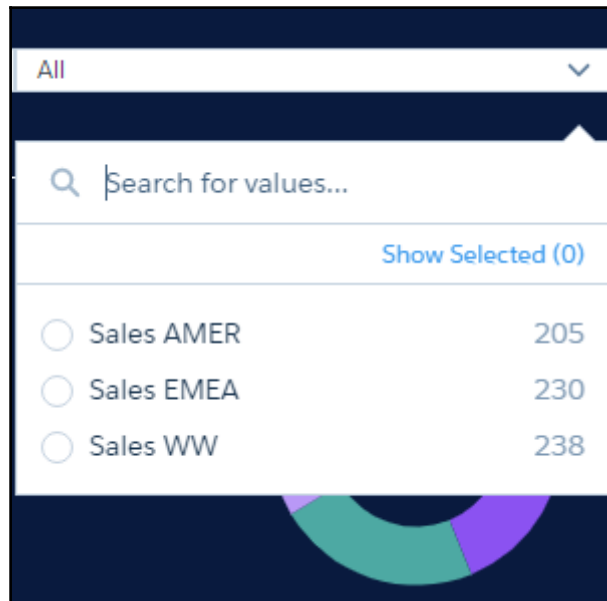
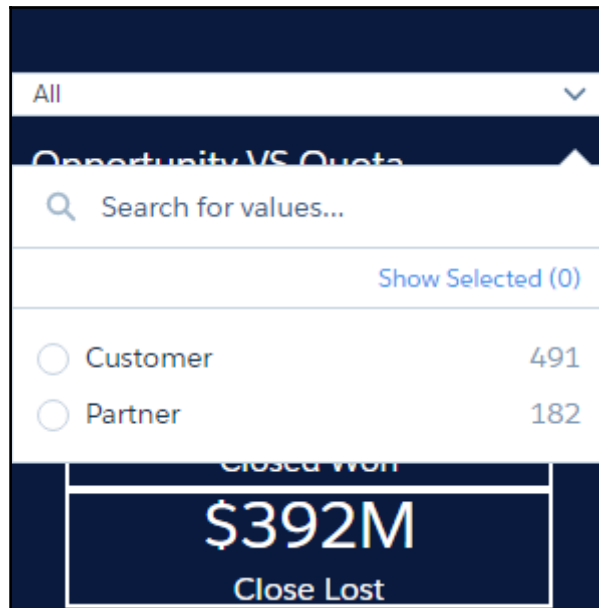
Su M Tu W Th F Sa

Send email notifications

Cancel Save







All

Search for values...

Show Selected (0)

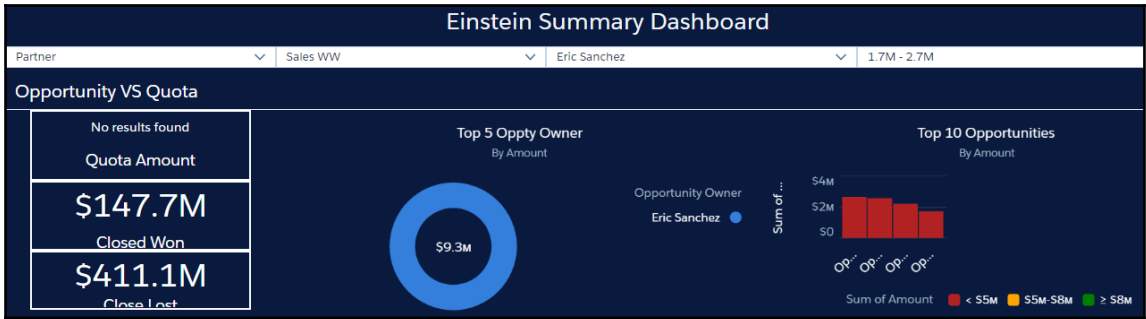
<input type="radio"/>	Bruce Kennedy	38
<input type="radio"/>	Catherine Brown	42
<input type="radio"/>	Chris Riley	48
<input type="radio"/>	Dennis Howard	31
<input type="radio"/>	Doroth Gardner	37
<input type="radio"/>	Eric Gutierrez	37
<input type="radio"/>	Eric Sanchez	37

680 - 8.6M

From To

680 8577295

680 8.6M



WIDGET
STEP

Step Properties ^

ID

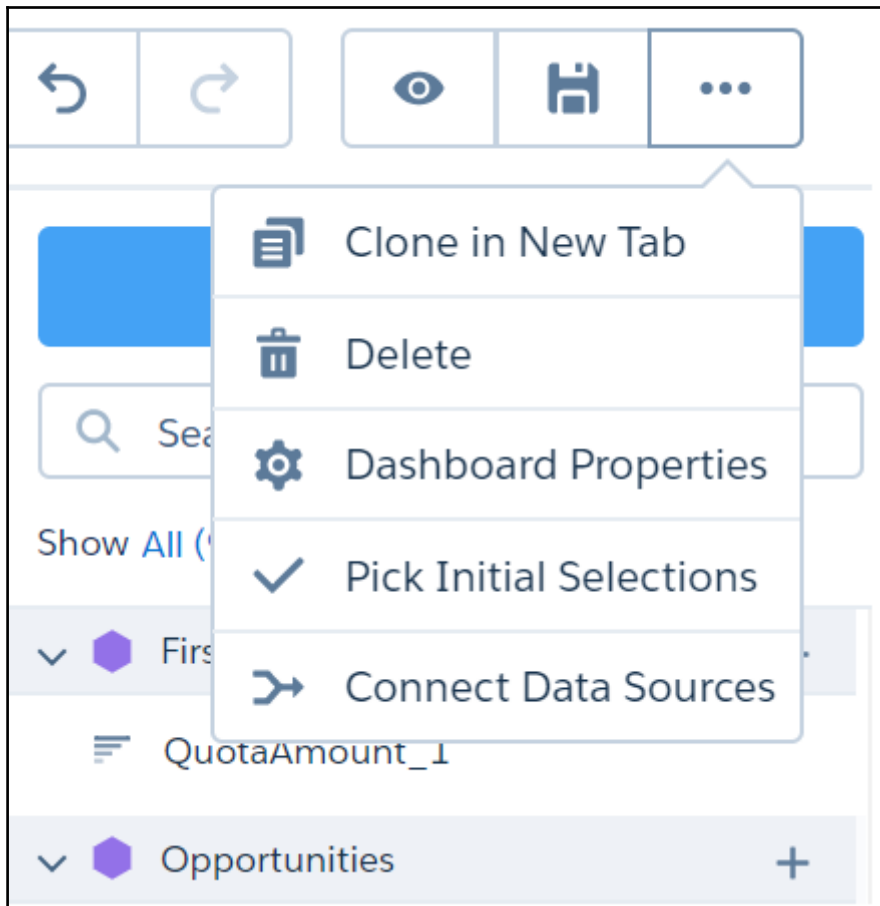
Top_5_Oppty_Owner_1

Display Label

Top 5 Oppty Owner

Filtering

- Apply global filters
- Apply filters from faceting i



New Connection ✕

Connection Name

Data Source 1

⋮ First_Quota: OwnerName ✎

Connects To

Data Source 2

⋮ opportunity: Owner.Name ✎

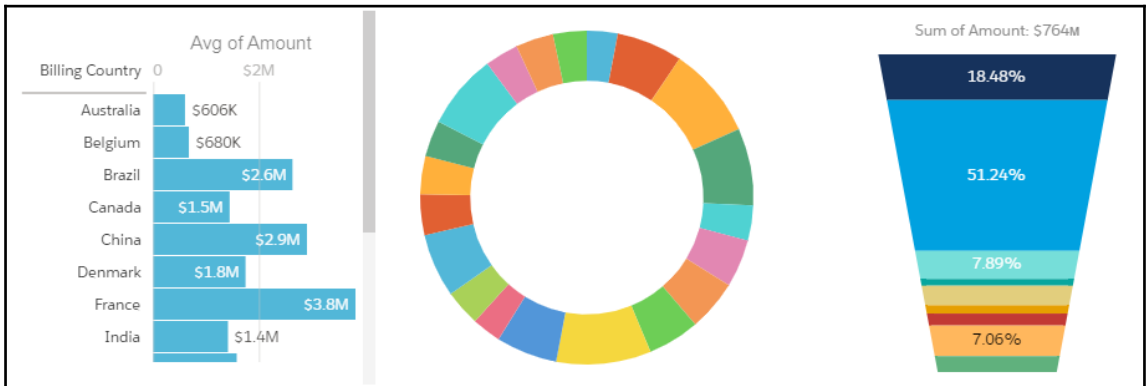
[Add Data Source](#)

Analytics Studio Einstein Summary Das... X New dashboard X

New dashboard Wave Dashboard Designer

Chart Raw Data Compare 123 Range List Date Toggle Scope Text Box

All Lenses (0)

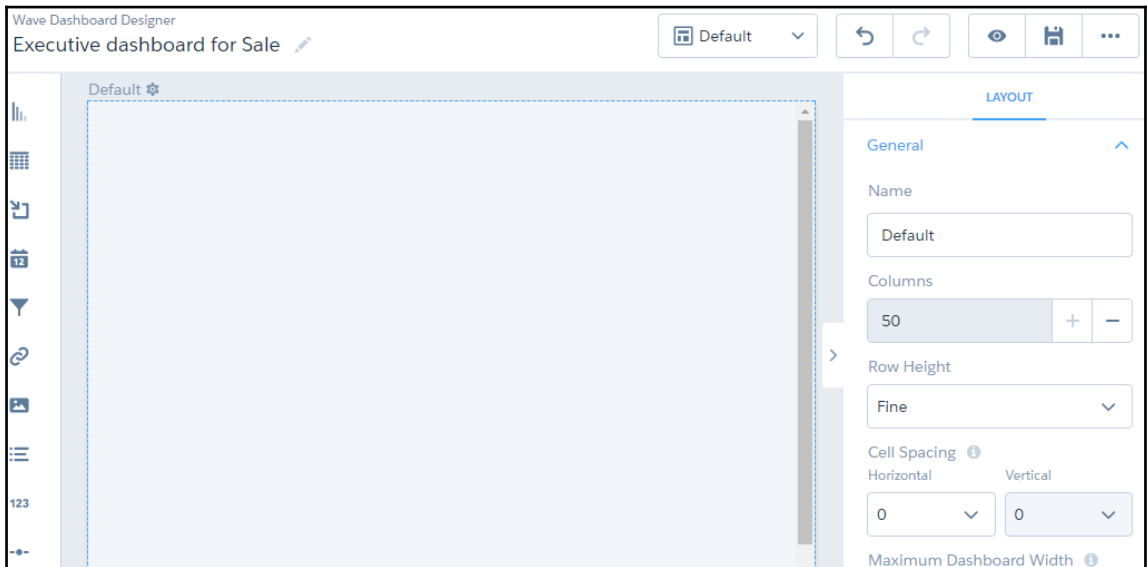
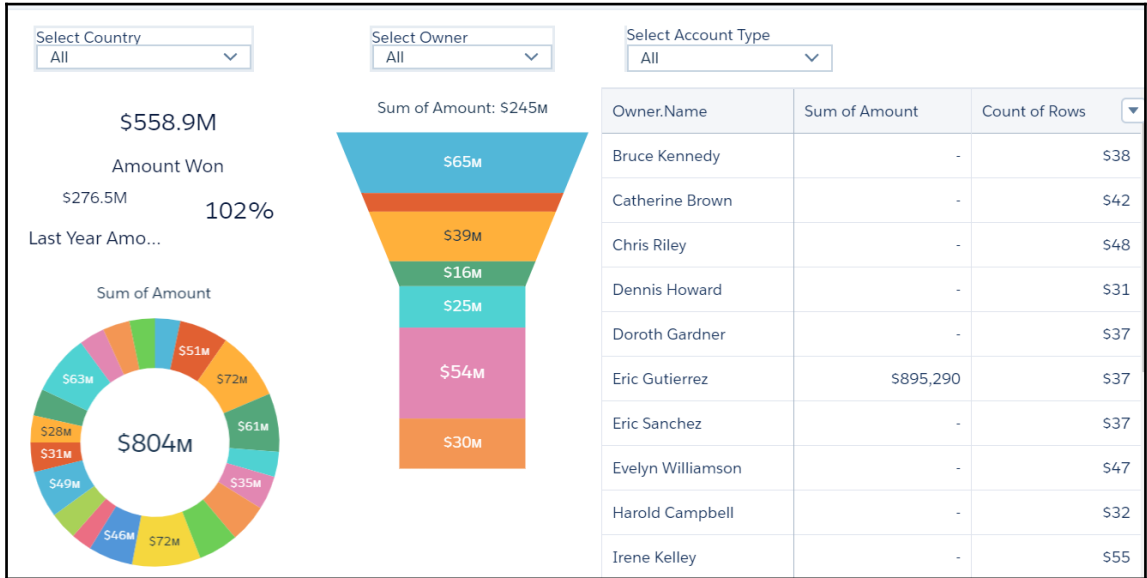


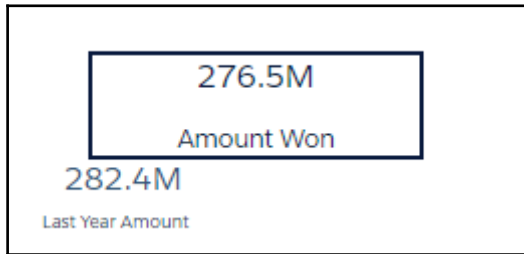
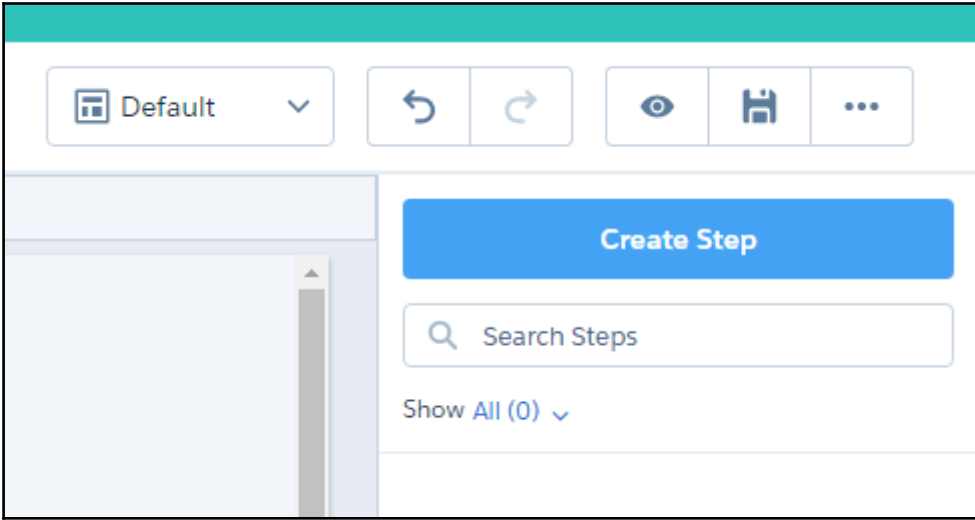
>

Wave Dashboard Designer

Link

Chapter 5: Einstein for Sales



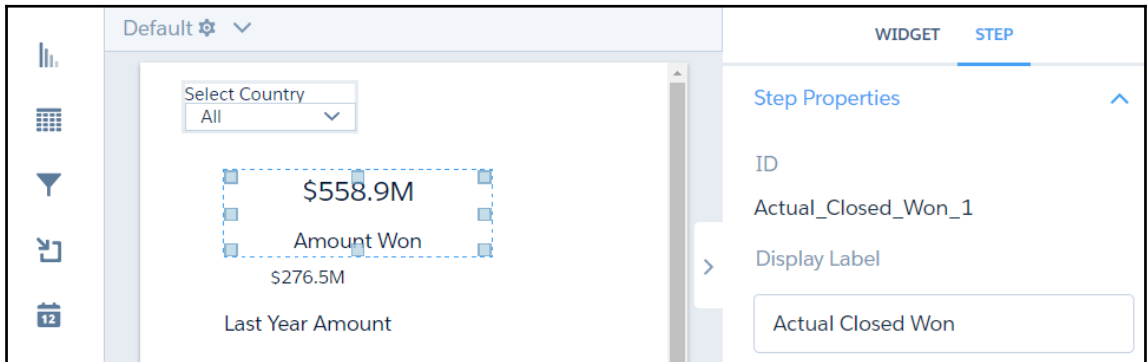
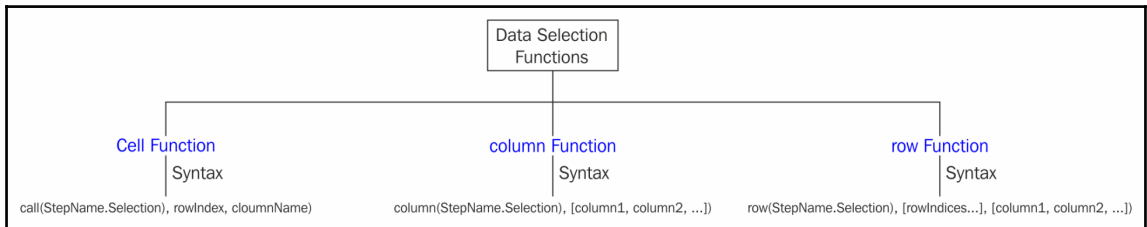
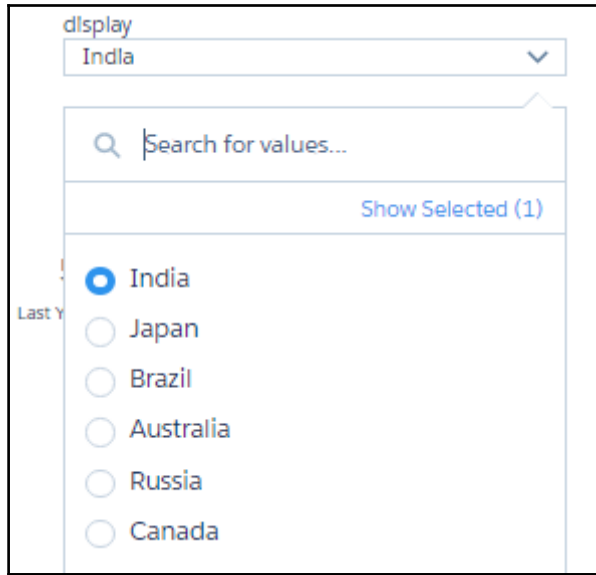


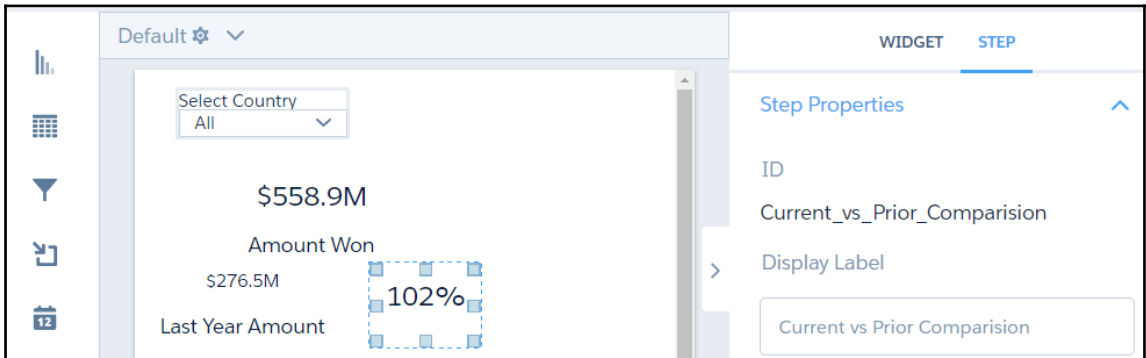
Create a Static Step with Custom Values ✕

Add the list of values, including the display name and, optionally, a value. To filter the dashboard based on these values, apply this static step to a list or toggle widget and bind the values to other widgets. [More information](#)

Display Label

DISPLAY	VALUE	
India	India	✕
Japan	Japan	✕
Brazil	Brazil	✕
Australia	Australia	✕
Russia	Russia	✕

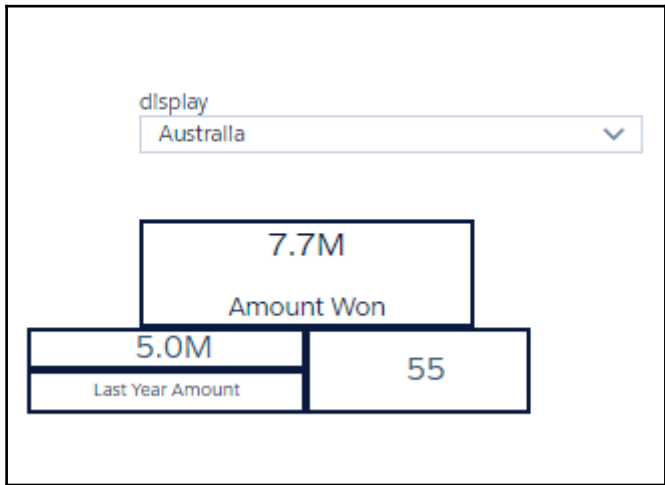





```

274     },
275     "current_vs_Prior_Comparision": {
276       "broadcastFacet": true,
277       "groups": [],
278       "numbers": [],
279       "query": "q = load \"opportunities\";\nq = group q by all;\nq = foreach q generate ({{coalesce(column
(Actual_Closed_Won_1.result,['sum_Amount']),0).asObject()}} - {{coalesce(column(Actual_Closed_Won_Pr_1
.result,['sum_Amount']),0).asObject()}})/{{coalesce(column(Actual_Closed_Won_Pr_1.result
,['sum_Amount']),0).asObject()}}*100 as 'sum_percent'; \nq = limit q 2000;";
280     "receiveFacet": true,
281     "selectMode": "single",
282     "strings": [],
283     "type": "saql",
284     "useGlobal": true,
285     "visualizationParameters": {
286       "parameters": {
287         "autoFitMode": "none",
288         "showValues": true,

```





XMD Editor

Configure your dataset extended metadata in an easy-to-use set of forms.



Metadata/JSON Editor

Enhanced lens.apex page: edit dataset XMD or lens/dashboard JSON.



SAQL Editor

Prototype SAQL, download results, use existing lens or dashboard queries as templates.

Open a dataset to get started...

Select an XMD to Edit ✕

All Apps
Select an app to filter the list of data sets...

🔍 Opportunities (1) ✕

Show All ✔

Open



XMD Editor : Opportunities (1)

Configure your dataset extended metadata in an easy-to-use set of forms

Organizations

Dimensions

Derived Dimensions

Measures

Derived Measures

Dates

Default Fields in a Table

Derived Measures i

+ Derived Measures

field	<input type="text" value="sum_Amount"/>	✕
label	<input type="text" value="sum_Amount"/>	
showInExplorer	<input type="text" value="true"/>	▼
format	format	<input type="text" value="\$#,###.00"/>
	multiplier	<input type="text" value="1"/>

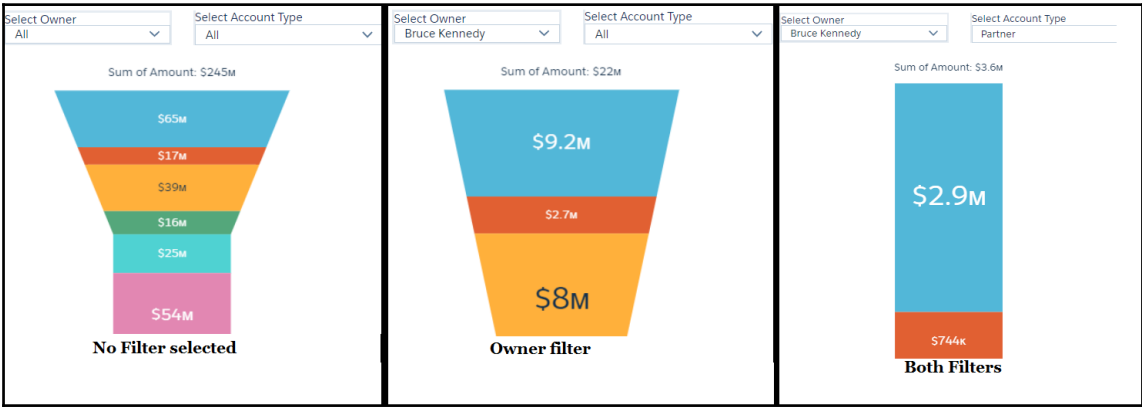
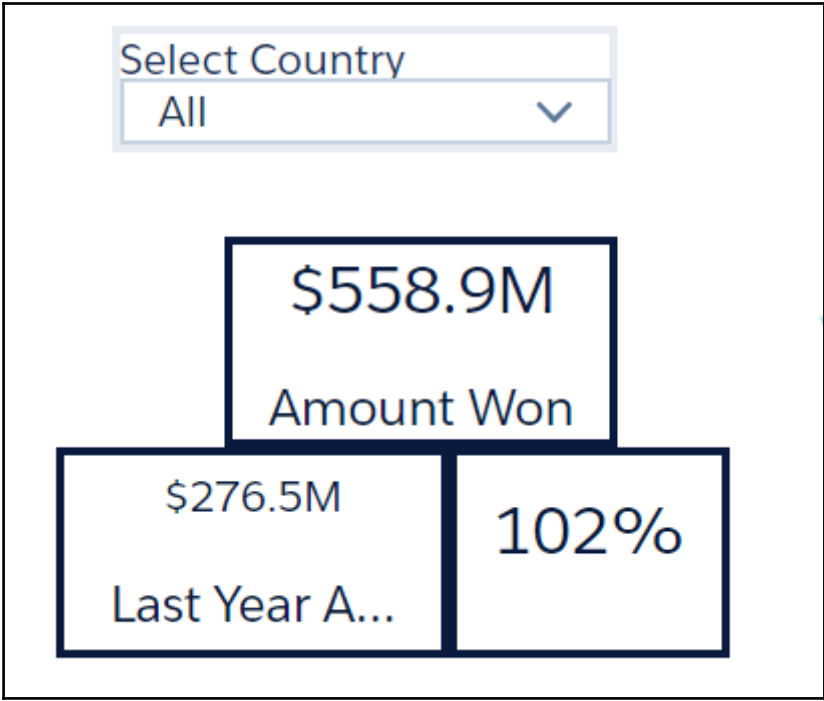


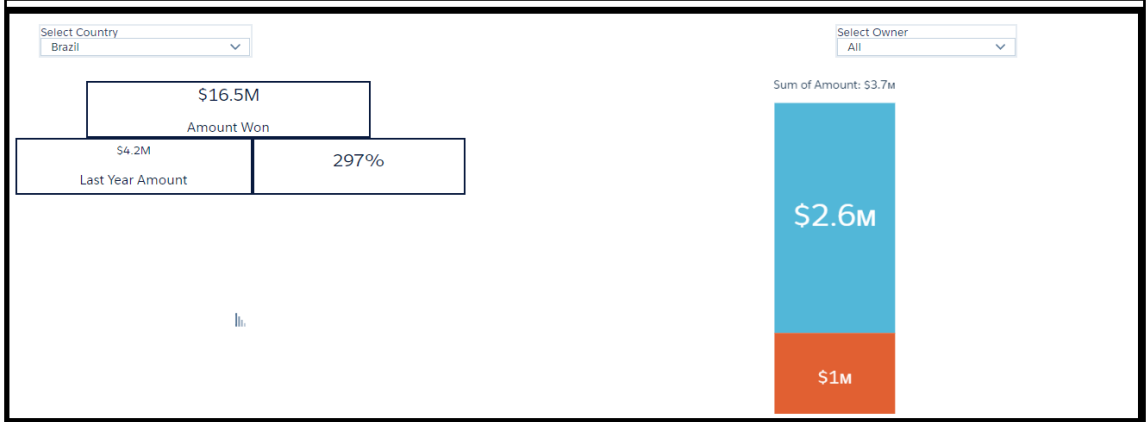
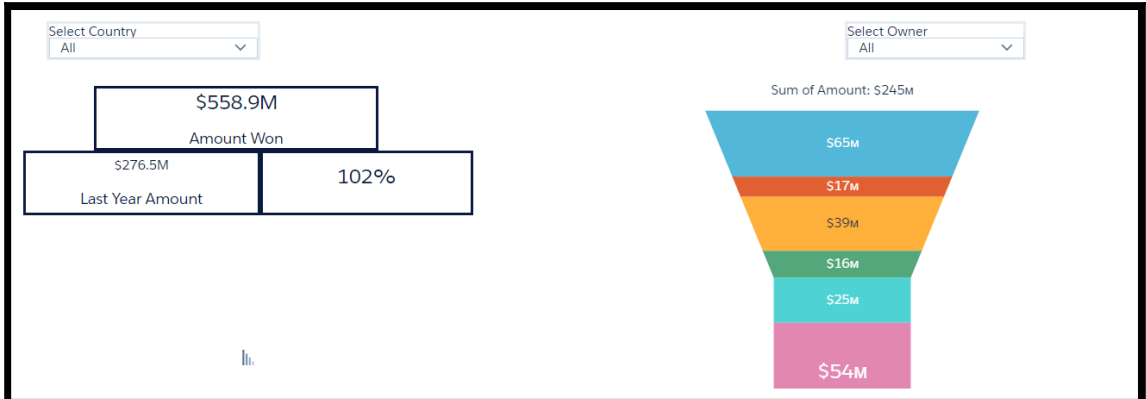
Derived Measures i

+ Derived Measures

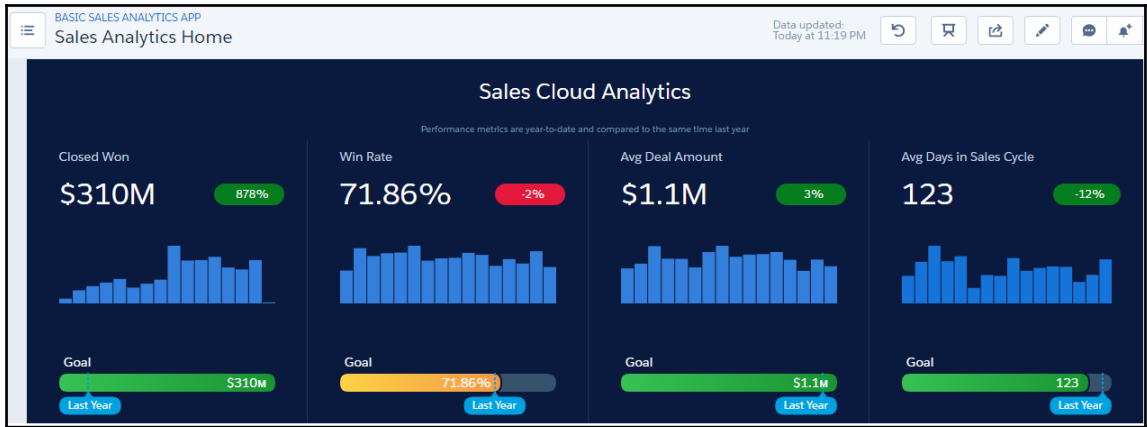
field	<input type="text" value="sum_percent"/>	✕
label	<input type="text" value="sum_percent"/>	
showInExplorer	<input type="text" value="true"/>	▼
format	format	<input type="text" value="#,###%"/>
	multiplier	<input type="text" value="1"/>







#	Account.BillingCountry	Account.Industry	Account.AccountSource	Account Annual Revenue	Account.Name	Account.Type
1	Canada	Finance	Employee Referral	500,000	Duncan535 Inc	Partner
2	Belgium	Banking	Trade Show	2,000,000	Bowers460 Inc	Partner
3	Singapore	Apparel	Advertisement	2,000,000	Collins928 Inc	Customer
4	Hong Kong	Insurance	Advertisement	2,000,000	Holmes945 Inc	Customer
5	Spain	Insurance	Partner	700,000,000	Jefferson853 Inc	Customer
6	USA	Banking	Web	700,000	Sharp908 Inc	Customer
7	USA	Technology	Employee Referral	2,000,000	Oliver959 Inc	Partner
8	Canada	Energy	Employee Referral	700,000	Ross559 Inc	Partner



Analytics Studio | Sales App

ANALYTICS
Sales App

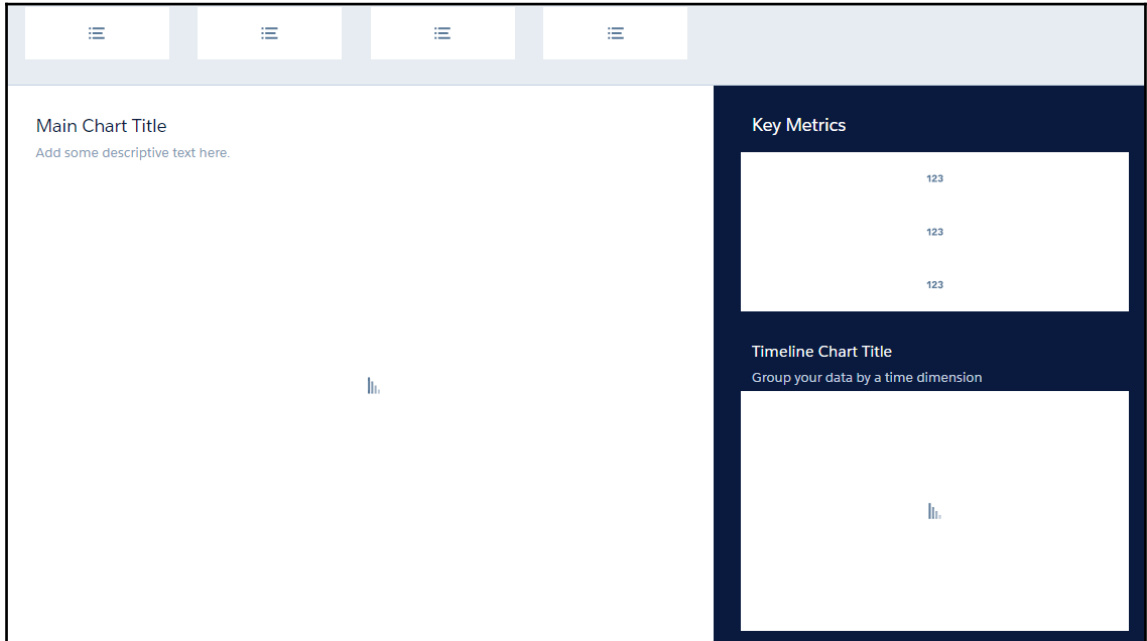
Template used: Sales Analytics 4.1 [Reconfigure app](#)

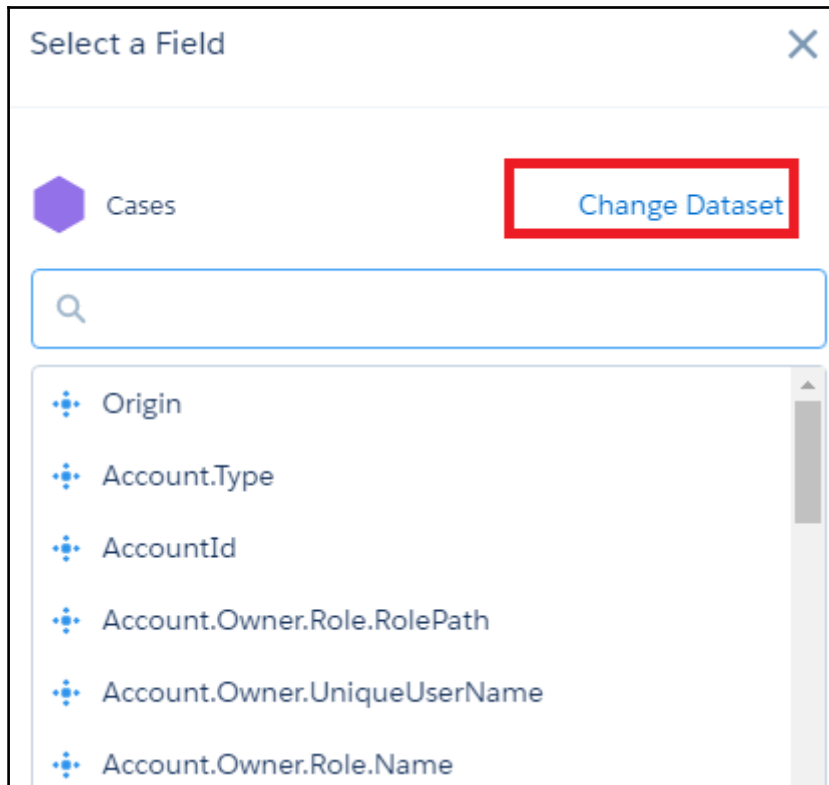
Search Sales App... 42 results [Create](#) [Run App](#)

Dashboards [View All](#)

TITLE	CREATED BY	LAST MODIFIED BY	DATA REFRESHED
Copy of Summary of Opportunity	Santosh Chitalkar	Santosh Chit... Nov 14, 2017 at 8:...	Nov 6, 2017 at 3:58 AM
Summary of Opportunity	Santosh Chitalkar	Santosh Chit... Nov 6, 2017 at 3:5...	Nov 6, 2017 at 3:58 AM
Summary of Account	Santosh Chitalkar	Santosh Chit... Nov 6, 2017 at 3:5...	Nov 6, 2017 at 3:58 AM
Company Overview	Santosh Chitalkar	Santosh Chit... Nov 6, 2017 at 3:5...	Nov 6, 2017 at 3:58 AM
Exec Overview - Pipeline Performance	Santosh Chitalkar	Santosh Chit... Nov 6, 2017 at 3:5...	Nov 6, 2017 at 3:58 AM

Chapter 6: Einstein at Your Services



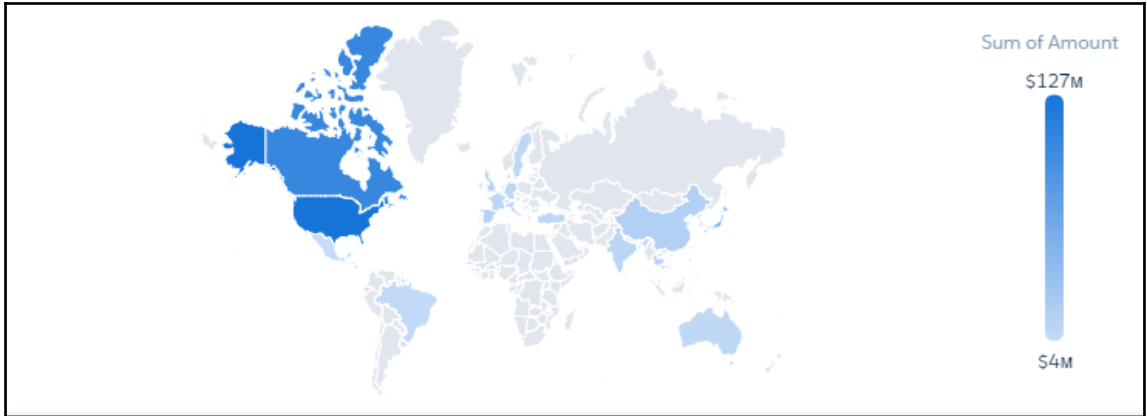


Create a Static Step with Custom Values ✕

Add the list of values, including the display name and, optionally, a value. To filter the dashboard based on these values, apply this static step to a list or toggle widget and bind the values to other widgets. [More information](#)

Display Label

DISPLAY	VALUE	
India	India	✕
Japan	Japan	✕
Brazil	Brazil	✕
Australia	Australia	✕
Russia	Russia	✕



WIDGET **STEP**

General ▼

Map ▲

Map Type

World Countries▼

Auto Zoom

Projection Type

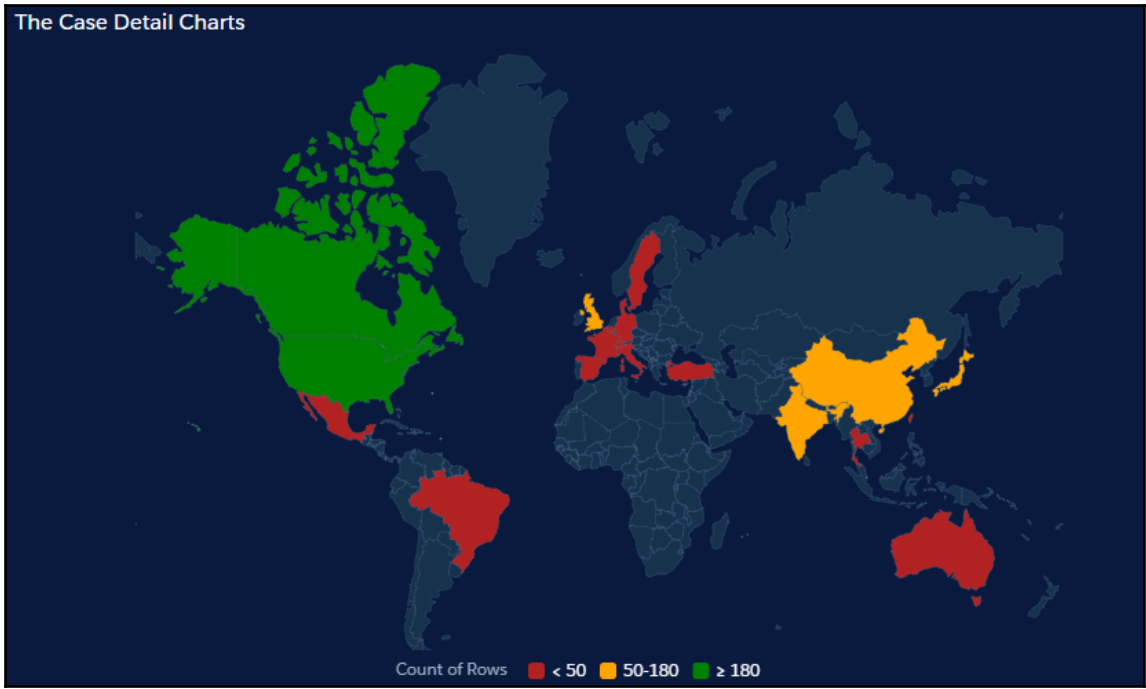
Mercator▼

Bin Values

Range Values

Low Value	High Value
50	180

The Case Detail Charts

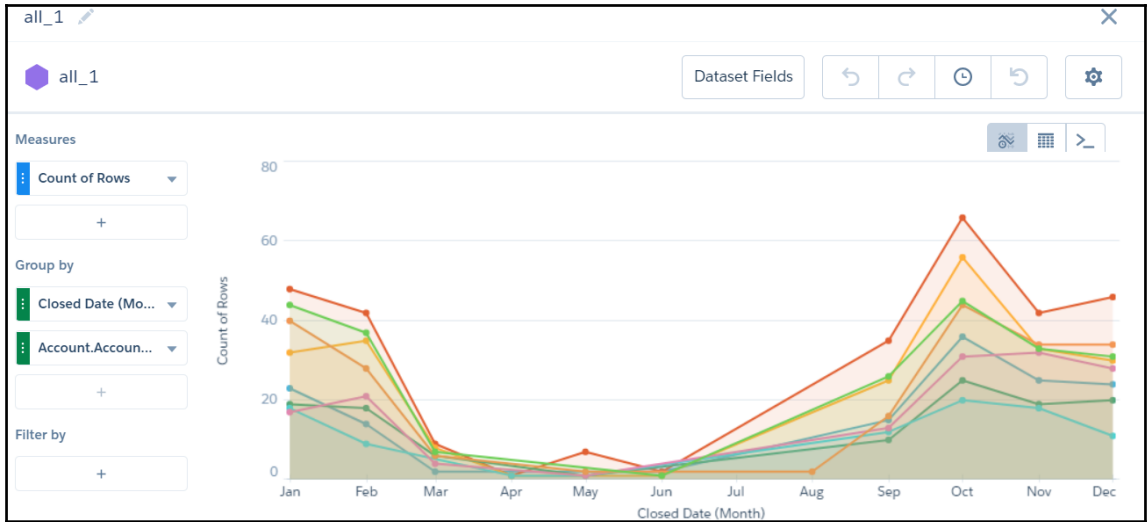


Key Metrics

Open Cases **177**

Closed Cases **1.4K**

Total Cases **1.6K**



The widget configuration interface shows the following settings:

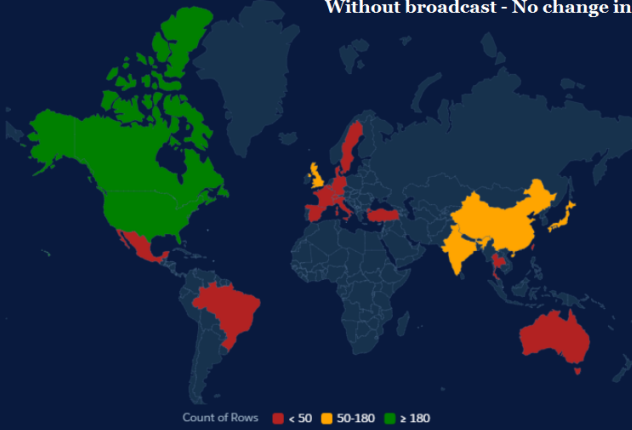
- Step Properties:**
 - ID: Cases_By_Country_1
 - Display Label: Cases By Country
- Filtering:**
 - Apply global filters
 - Apply filters from faceting
- Selection Type:** Single selection
- Initial Selections:** No Selections

The Case Detail Charts

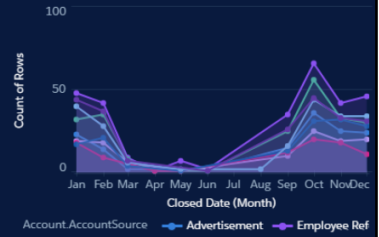
Without broadcast - No change in value

Key Metrics

Open Cases	177
Closed Cases	1.4K
Total Cases	1.6K



Timeline Chart Title

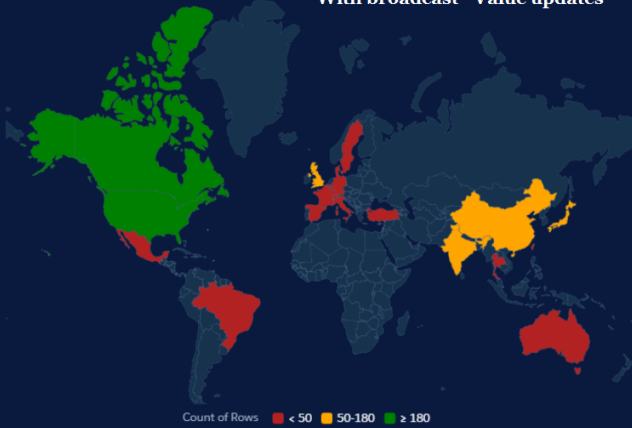


The Case Detail Charts

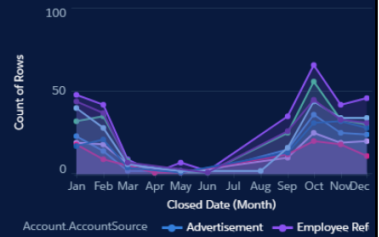
With broadcast - Value updates

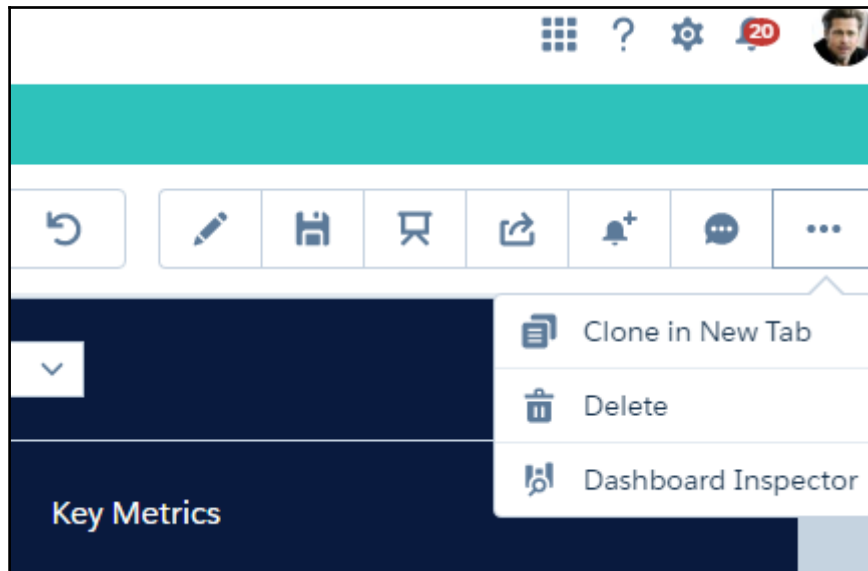
Key Metrics

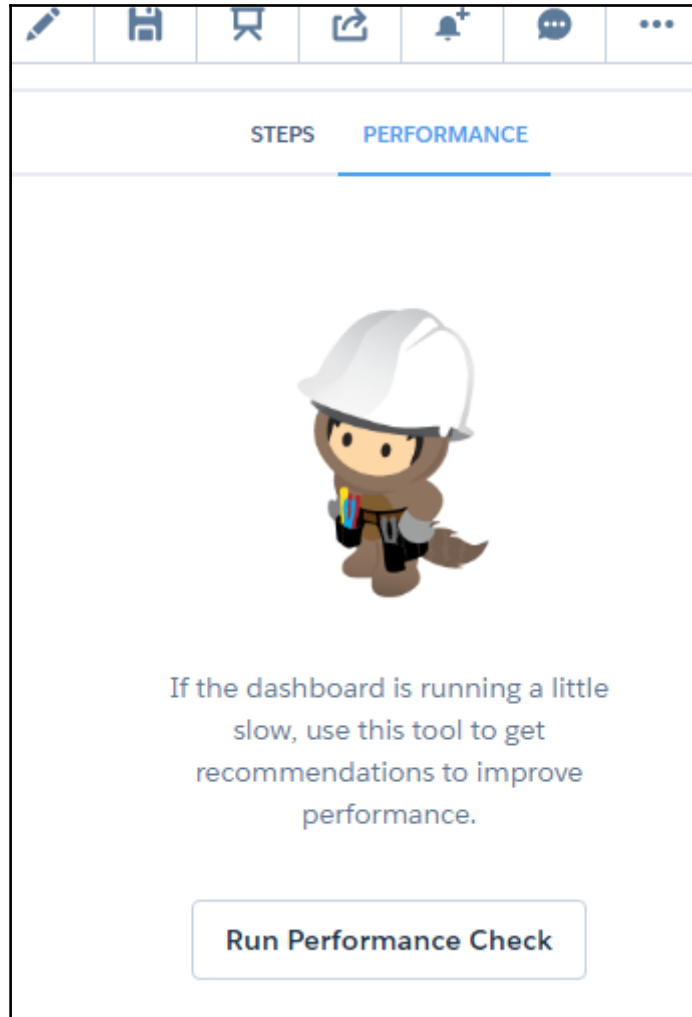
Open Cases	77
Closed Cases	4K
Total Cases	1.6K



Timeline Chart Title







STEPS	PERFORMANCE
Initial Load Time	Initial # Queries
1.4s	10
Performance Factors ⓘ	
› ✓ Steps that Fire Multiple Queries	
› ✓ Too Many Steps	
› ✓ Redundant Steps	



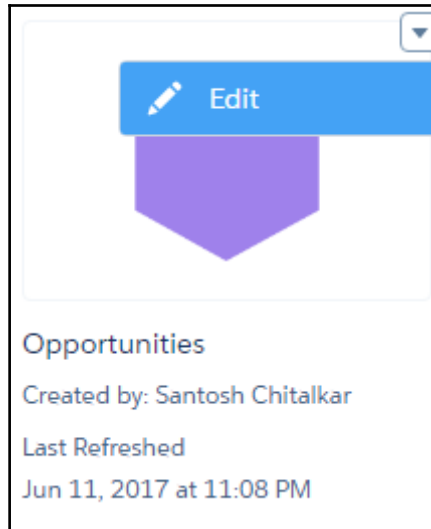
Sales cloud



Service cloud



Analytics Cloud



Analytics Studio Dataset X

DATASET
Opportunities

API Name	Last Updated	Created By	Created
opportunity	Jun 11, 2017 at 11:08 PM	Santosh Chitalkar	Jun 11, 2017 at 11:04 PM

Security Predicate
None


[Configure Actions](#)

[Delete Dataset](#)

Configure Actions in Wave ? X

0017F000001RInbQAG Opportunities

- Account ID
- Account Name ✓
- Account Owner ✓
- Account Owner ID
- Account Owner Role
- Account Source
- Account Type
- Account.Owner.Role....
- Account.Owner.Role....
- Account.Owner.Role....
- Account.Owner.Unia...



Add action menus to dataset dimension fields to allow users to open URLs or perform actions, like create an account or open a Salesforce record. These actions appear in Wave chart legends and table cells.

To start configuring an action, in the left pane, select the dataset dimension field on which the action should appear.

Cancel Save







Perform Salesforce actions ⓘ


- All actions
- Choose actions










Each user can only see actions assigned to their page layout.

Salesforce Actions

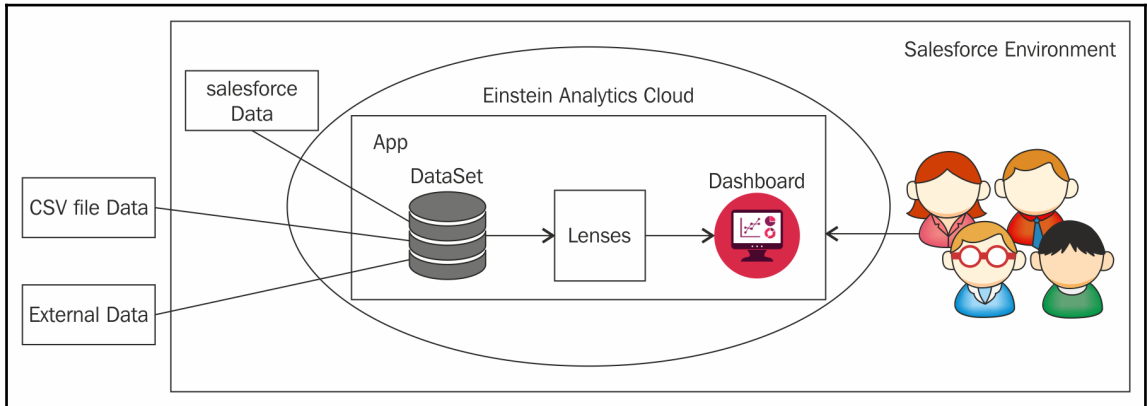


<input type="checkbox"/>	LABEL	API NAME
<input type="checkbox"/>	 File	FeedItem.ContentPost
<input type="checkbox"/>	 Link	FeedItem.LinkPost
<input type="checkbox"/>	 Log a Call	LogACall
<input type="checkbox"/>	 New Account	NewAccount
<input type="checkbox"/>	 New Case	NewCase
<input type="checkbox"/>	 New Contact	NewContact

-
-  Open Record

 -  New Task
 -  New Event
 -  Post
 -  File
 -  New Contact
 -  New Case
 -  Log a Call
 -  Link
 -  Poll

Chapter 7: Security and Sharing in Einstein Analytics



Quick Find / Search.

[Expand All](#) | [Collapse All](#)

Lightning Experience Migration Assistant

Switch to the modern, intelligent Salesforce.

[Get Started](#)

Salesforce Mobile Quick Start

[Force.com Home](#)

Profiles

[Help for this Page](#)

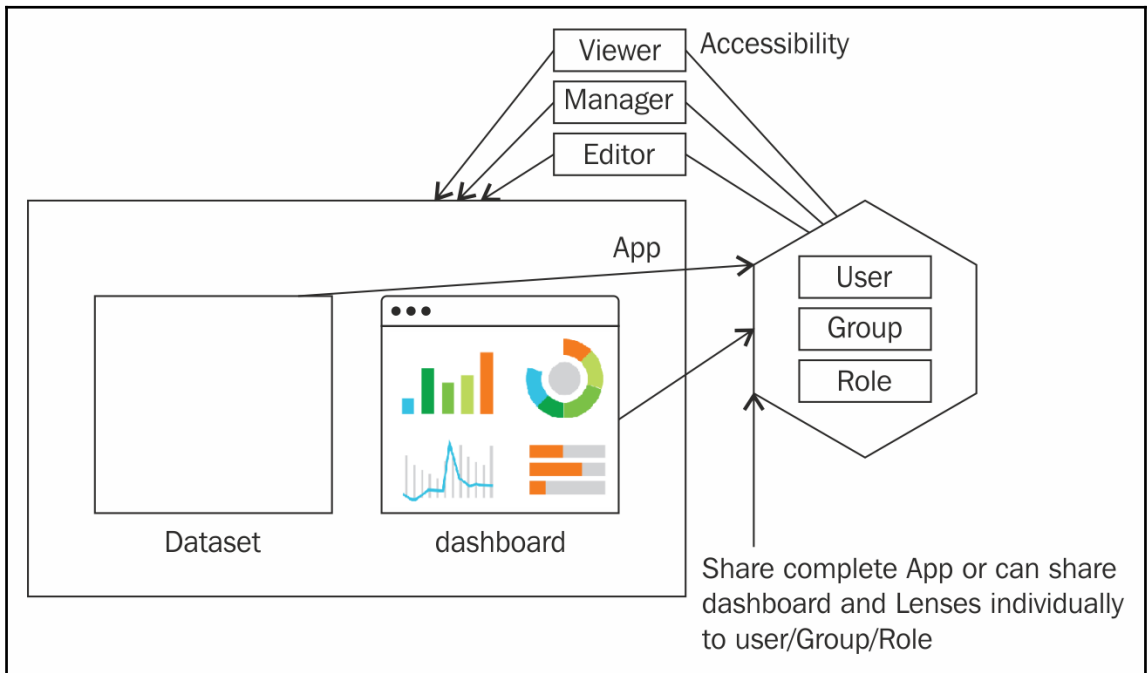
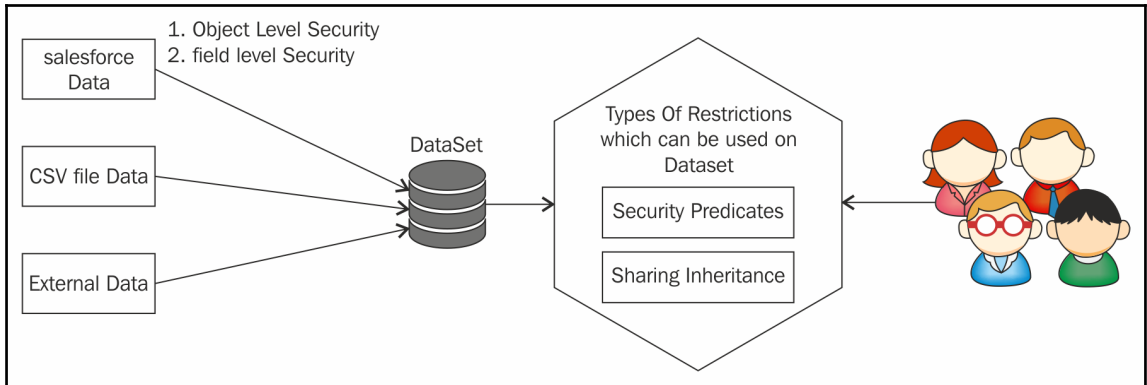
All Profiles | [Edit](#) | [Delete](#) | [Create New View](#)

[New Profile](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | [All](#)

	Action	Profile Name	User License
<input type="checkbox"/>	Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User
<input type="checkbox"/>	Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User
<input type="checkbox"/>	Edit Clone	Authenticated Website	Authenticated Website
<input type="checkbox"/>	Edit Clone	Authenticated Website	Authenticated Website
<input type="checkbox"/>	Edit Clone	Chatter External User	Chatter External

1-40 of 40 | 0 Selected | << Previous Next >> | Page 1 of 1



Analytics Studio


ANALYTICS
Recent
6 Items

Search Apps... Create

ALL APPS DASHBOARDS LENSES DATASETS


Recent

- Created by Me
- Shared with Me
- Pinned Apps
- Notifications




My Private App
Created by: Santosh Chitalkar
Created on:

[Run App](#)




Sales App
Created by: Santosh Chitalkar
Created on: Jun 11, 2017 at 11:03 PM

[Run App](#)



Shared App
Created by:
Created on: Jun 8, 2017 at 11:59 PM

[Run App](#)




Hello App
Created by: Santosh Chitalkar
Created on: Aug 31, 2017 at 10:53 PM


[Run App](#)

Sales App

GIVE ACCESS POST TO FEED GET URL



Santosh Chitalkar

Manager 


Invite others:

User

Type a name...



Viewer

Add


Enable sharing with Communities 

Save

Home Chatter Accounts Contacts Leads Opportunities Products Files +

Quick Find / Search...  

Expand All | Collapse All



Lightning Experience Migration Assistant
Switch to the modern, intelligent Salesforce.
[Get Started](#)

Public Groups [Help for this Page](#)


A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All ▾ [Edit](#) | [Create New View](#)



A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

[New](#)

Action	Label ↑	Group Name	Created By	Created Date
Edit Del	Analytics Sales	Analytics_Sales	Chitalkar, Santosh	10/2/2017 7:19 AM

 Sales App ✕

[GIVE ACCESS](#) | [POST TO FEED](#) | [GET URL](#)

 Santosh Chitalkar Manager 

Invite others:

User

Type a name...


Viewer

Add

User

Group





Role

[Inviting with Communities](#) 

[Save](#)

Shared App ✕

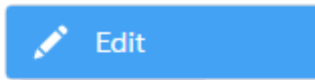
[GIVE ACCESS](#) [POST TO FEED](#) [GET URL](#)


	Partner Community Users	None	
	Customer Community Users	None	
	Integration User	Manager	

Invite others:

Group: Viewer:



Enable sharing with Communities ?

 Edit



Opportunities
Created by: Santosh Chitalkar
Last Refreshed
Jun 11, 2017 at 11:08 PM


Analytics Studio Dataset X

 DATASET
Opportunities 


API Name	Last Updated	Created By	Created
opportunity	Jun 11, 2017 at 11:08 PM	Santosh Chitalkar	Jun 11, 2017 at 11:04 PM

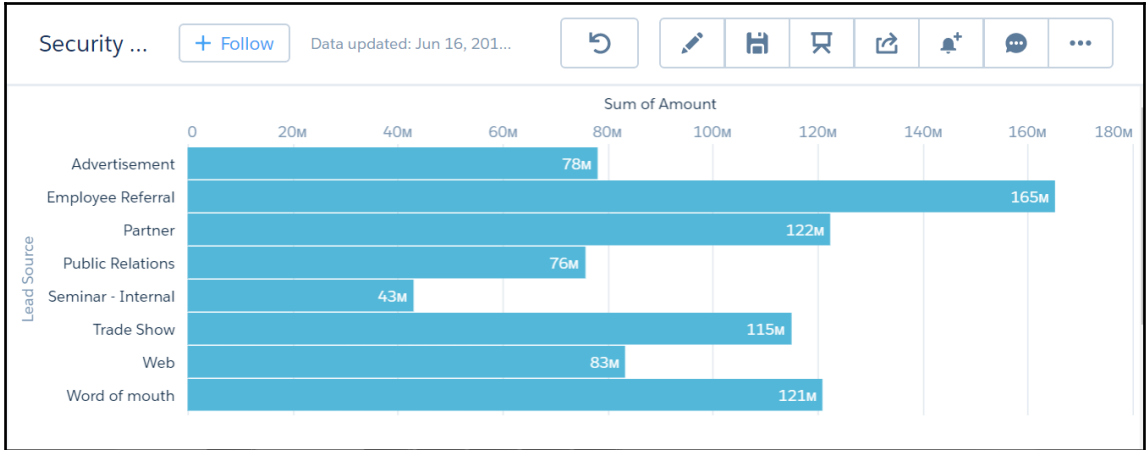
Security

Sharing Source

Apply Salesforce sharing settings from **No sharing source** 

Security Predicate

'Owner.UniqueUserName' == "SUser.Name" || 'Owner.UniqueUserName' == "Santosh Chitalkar" 



Salesforce.

[Get Started](#)

[Salesforce Mobile Quick Start](#)

[Force.com Home](#)

[Administer](#)

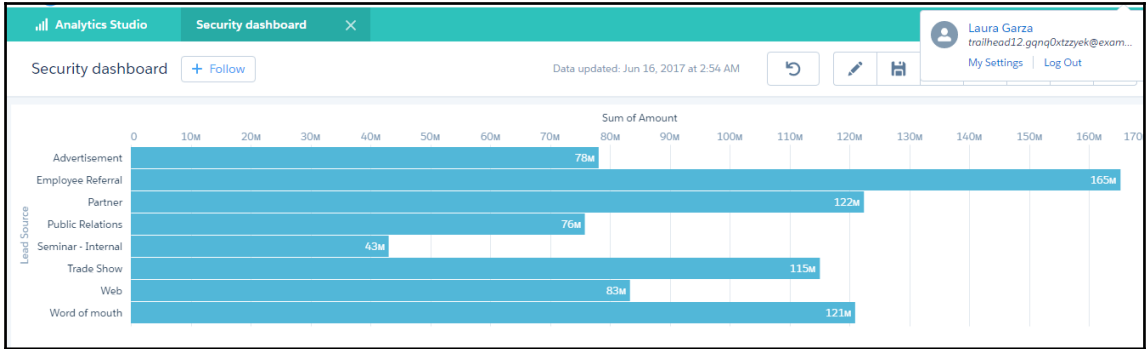
[Manage Users](#)

[Users](#)

[Adoption Manager](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/>	Action	Full Name	Alias	Username
<input type="checkbox"/>	Edit	User. Integration	integ	integration@00d7f000000su78uae.com
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00d7f000000su78uae.gqp21f9lh7th@chatter.salesforce.com
<input type="checkbox"/>	Edit	Chitalkar. Santosh	SChit	santosh.chitalkar@gmail.com.wave
<input type="checkbox"/>	Edit	User. Security	sec	insightssecurity@00d7f000000su78uae.com
<input type="checkbox"/>	Edit	Garza. Laura	lgarz	trailhead12.gqnq0xtzzyek@example.com



Edit

Opportunities

Created by: Santosh Chitalkar

Last Refreshed
Jun 11, 2017 at 11:08 PM

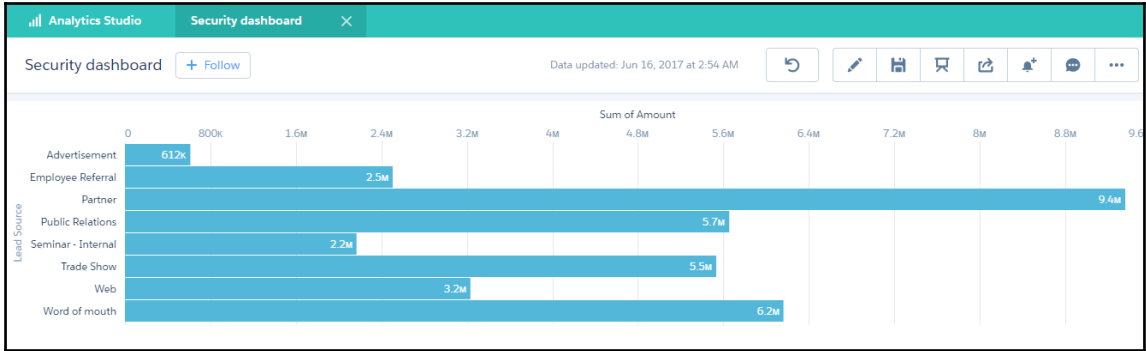
Security

Sharing Source

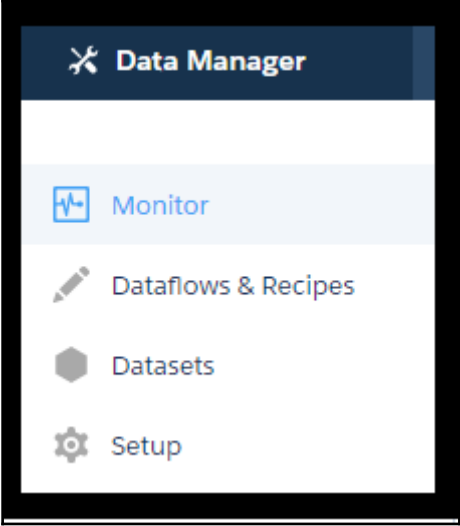
Apply Salesforce sharing settings from **No sharing source**

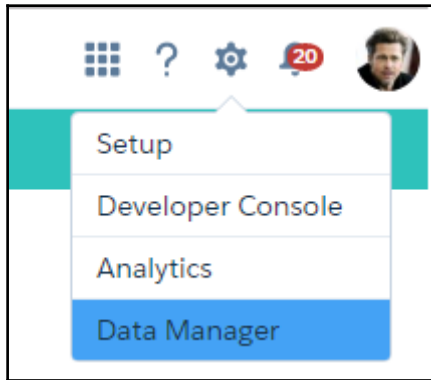
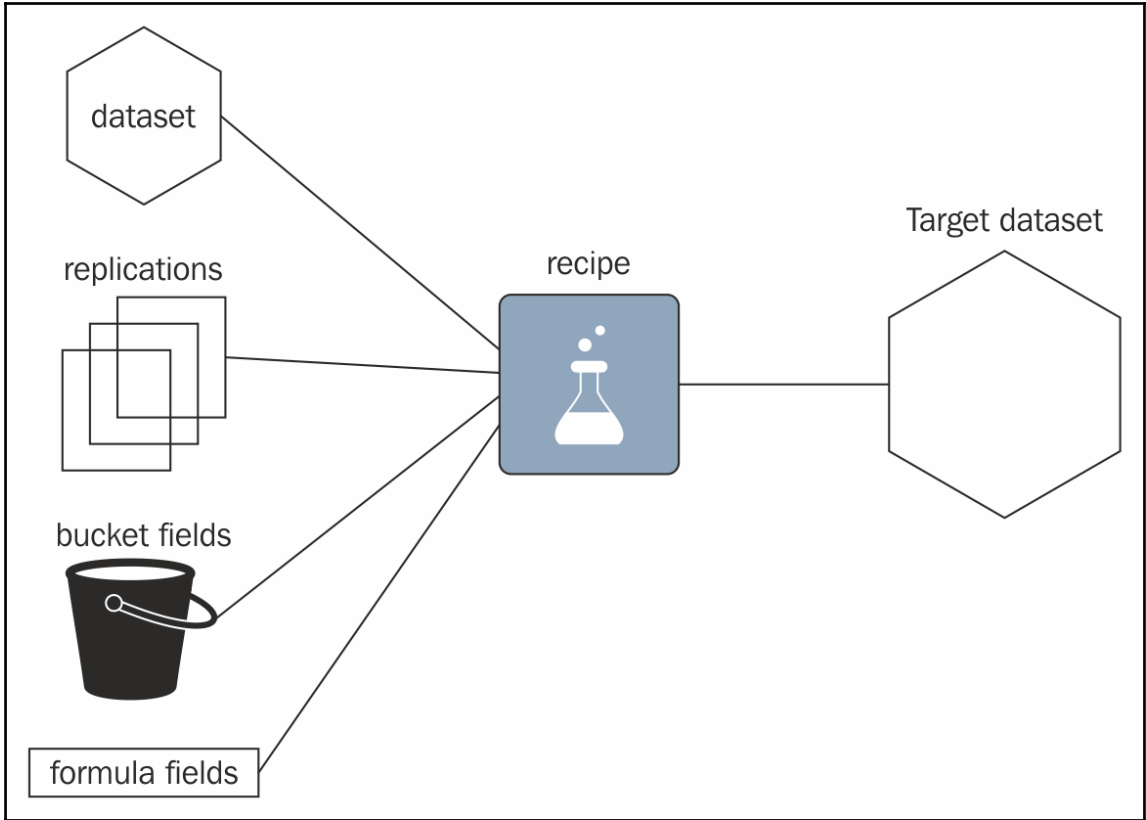
Security Predicate

'OwnerId' == "SUser.Id"



Chapter 8: Recipe in Einstein





Data Manager

Monitor

Dataflows & Recipes

Datasets

Setup

Dataflows & Recipes
Cleanse, transform, and combine data from multiple sources.

CREATE RECIPE


DATAFLAWS **DATASET RECIPES**

RECIPE NAME	RECIPE STATUS	RECIPE LAST SAVED	TARGET DATASET	TARGET DATASET STATUS
-------------	---------------	-------------------	----------------	-----------------------

Select the base dataset for your Recipe

PUBLISHED **REPLICATED**

NAME	APP	DATA REFRESHED
Opportunities	Shared App	Jun 16, 2017 at 2:54...
Opportunities	Security App	Jun 11, 2017 at 11:0...
Cases	Sales App	Nov 6, 2017 at 3:58 ...
Accounts	Sales App	Nov 6, 2017 at 3:58 ...
First_Quota	Hello App	Oct 7, 2017 at 9:20 ...
Account with Cases	My Private App	Nov 6, 2017 at 1:46 ...
MyUser	My Private App	Jun 16, 2017 at 2:54...
Users	Sales App	Nov 6, 2017 at 3:58 ...




Create a Recipe for This Dataset

Dataset Recipe Name

Cancel
Continue

Data Manager
Account with Cases


DATASET RECIPE
Account with Cas...

Recipe Preview for 29/29 Fields, 950 Rows

Save
Create Dataset

	LAST MODIFIED ...	OWNER.ROLE.R...	OWNER.UNIQU...	OWNER.FULLPH...	OWNER.SMALLP...	OWNER.ROLE.P...
No transformations have been added yet	2017-11-06T09:39:55.00...	CEO	Johnny Green	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Bruce Kennedy	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Bruce Kennedy	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Eric Sanchez	https://personalsantosh...	https://personalsantosh...	CEO
	2017-11-06T09:39:55.00...	CEO	Kelly Frazier	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Kelly Frazier	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Bruce Kennedy	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Eric Gutierrez	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Dennis Howard	https://personalsantosh...	https://personalsantosh...	Sales WW
	2017-11-06T09:39:55.00...	CEO	Eric Sanchez	https://personalsantosh...	https://personalsantosh...	CEO
	2017-11-06T09:39:55.00...	CEO	Evelyn Williamson	https://personalsantosh...	https://personalsantosh...	CEO
	2017-11-06T09:39:55.00...	CEO	Johnny Green	https://personalsantosh...	https://personalsantosh...	Sales WW

Suggestions
Extract
Split
Substring
Replace

Select the fields that will act as the Lookup Keys for the Base Dataset and the Lookup Dataset ✕

Account ID
Account ID + Add Another

Common column in both datasets

ORIGIN DATASET
Account_Cases Q Search Fields...

BILLING COUNTRY	CREATED DATE	ACCOUNT ID
ida	2017-11-06T09:39:55.000Z	0017F00000IkPRIQAN
Canada	2017-11-06T09:39:55.000Z	0017F00000IkPRmQAN
erlanc	2017-11-06T09:39:55.000Z	0017F00000IkProQAN
	2017-11-06T09:39:55.000Z	0017F00000IkPRqQAN
a	2017-11-06T09:39:55.000Z	0017F00000IkPrRQAN
l	2017-11-06T09:39:55.000Z	0017F00000IkPRsQAN
ce	2017-11-06T09:39:55.000Z	0017F00000IkPRIQAN
	2017-11-06T09:39:55.000Z	0017F00000IkPRuQAN

LOOKUP DATASET
Cases 32/32 Fields, 1625 Rows ✎ Q Search Fields...

ACCOUNT ID	ACCOUNT.OWNER.ROL...	ACCOUNT.OWNER.U...
0017F00000IkPgrQAF	00E7F00000161tUAA/00E7...	Kelly Frazier
0017F00000IkPWvQAN	00E7F00000161tUAA/00E7...	Johnny Green
0017F00000IkPjUQAV	00E7F00000161tUAA/00E7...	Laura Palmer
0017F00000IkPjIQAF	00E7F00000161sUAA	Eric Sanchez
0017F00000IkPcoQAF	00E7F00000161tUAA/00E7...	Doroth Gardner
0017F00000IkPhyQAF	00E7F00000161sUAA	Irene McCoy
0017F00000IkPXvQAN	00E7F00000161tUAA/00E7...	Johnny Green
0017F00000IkPibQAF	00E7F00000161tUAA/00E7...	Harold Campbell

Back Continue

Save

Create Dataset

OWNER.SMALL...		OWNER...
https://personalsantosh-...		00E7F00000...
https://personalsantosh-...	Sales	00E7F00000...

Save Recipe

Save As New...

RUN RECIPE | Select the fields that you would like to be in your target dataset when the recipe runs ✕

43 out of 61 fields selected to be in your dataset.

- Accounts (29)
- Cases (14)

App
Hello App ▾

Dataset Name
Account with Cases

Security Predicate
Add your security predicates here

43 out of 61 Fields

Search Fields...

<input type="checkbox"/>	FIELD
<input checked="" type="checkbox"/>	LAST MODIFIED DATE
<input checked="" type="checkbox"/>	OWNER.ROLE.ROLENAMES
<input checked="" type="checkbox"/>	OWNER.UNIQUEUSERNAME
<input checked="" type="checkbox"/>	OWNER.FULLPHOTOURL
<input checked="" type="checkbox"/>	OWNER.SMALLPHOTOURL
<input checked="" type="checkbox"/>	OWNER.ROLE.PARENTROLE.NAME
<input checked="" type="checkbox"/>	OWNER.ROLE.PARENTROLEID
<input checked="" type="checkbox"/>	ACCOUNT NAME
<input checked="" type="checkbox"/>	INDUSTRY

Click on a field to preview its values here

Cancel Continue

Schedule recipe to run periodically? ✕

Yes

No, Run This Time Only

Run Recipe

Data Manager		Account with Cases					
DATASET RECIPE Account with Cas...		Recipe Preview for 29/29 Fields, 950 Rows				Save	Create Dataset
1	LOOKUP Lookup 14 fields from 'Cases' Merge keys: 'Account ID' and 'Account ID'	LAST MODIFIED ...	OWNER.ROLE.R...	OWNER.UNIQU...	OWNER.FULLPH...	OWNER.SMALLP...	OWNER.ROLE.P...
		2017-11-06T09:39:55.00...	CEO	Johnny Green	https://personalsantosh...	https://personalsantosh...	Sales WW
		2017-11-06T09:39:55.00...	CEO	Bruce Kennedy	https://personalsantosh...	https://personalsantosh...	Sales WW
		2017-11-06T09:39:55.00...	CEO	Bruce Kennedy	https://personalsantosh...	https://personalsantosh...	Sales WW
2	COMPUTE [AnnualRevenue]/12	2017-11-06T09:39:55.00...	CEO	Eric Sanchez	https://personalsantosh...	https://personalsantosh...	CEO
		2017-11-06T09:39:55.00...	CEO	Kelly Frazier	https://personalsantosh...	https://personalsantosh...	Sales WW
		2017-11-06T09:39:55.00...	CEO	Kelly Frazier	https://personalsantosh...	https://personalsantosh...	Sales WW
		2017-11-06T09:39:55.00...	CEO	Bruce Kennedy	https://personalsantosh...	https://personalsantosh...	Sales WW

for 29/29 Fields, 950 Rows			
INDUSTRY	OWNER.ROLE.H...	OWNER ID	ACCOUNT SOU...
Electronics	CEO	0057F000001DmKyQAK	Advertisement
Education	CEO	0057F000001DmKnQAK	Employee Referral
Banking	CEO	0057F000001DmKnQAK	Advertisement
Communications	CEO	0057F000001DmL2QAK	Partner
Biotechnology	CEO	0057F000001DmKuQAK	Employee Referral
Media	CEO	0057F000001DmKuQAK	Employee Referral
Education	CEO	0057F000001DmKnQAK	Employee Referral
Education	CEO	0057F000001DmKqQAK	Partner
Technology	CEO	0057F000001DmKvQAK	Employee Referral
Healthcare	CEO	0057F000001DmL2QAK	Public Relations
Media	CEO	0057F000001DmL0QAK	Word of mouth
Insurance	CEO	0057F000001DmKyQAK	Public Relations
Banking	CEO	0057F000001DmKsQAK	Partner
Technology	CEO	0057F000001DmKnQAK	Web

Industry

PROFILE ATTRIBUTES NAVIGATOR

Values from 950 Rows

950 valid values (100%)
0 null values (0%)

▼ Frequent Values

Energy	72
Apparel	67
Technology	62
Banking	61
Insurance	61

[View More](#)

> String Length

for 29/29 Fields, 950 Rows

Save Create Dataset

INDUSTRY	OWNER.ROLE.H...	OWNER ID	ACCOUNT SOU...
Electronics	CEO	0057F000001DmKyQAK	Advertisement
Education	CEO	0057F000001DmKnQAK	Employee Referral
Banking	CEO	0057F000001DmKnQAK	Advertisement
Communications	CEO	0057F000001DmL2QAK	Partner
Biotechnology	CEO	0057F000001DmKuQAK	Employee Referral
Media	CEO	0057F000001DmKuQAK	Employee Referral
Education	CEO	0057F000001DmKnQAK	Employee Referral
Education	CEO	0057F000001DmKqQAK	Partner
Technology	CEO	0057F000001DmKvQAK	Employee Referral
Healthcare	CEO	0057F000001DmL2QAK	Public Relations
Media	CEO	0057F000001DmL0QAK	Word of mouth
Insurance	CEO	0057F000001DmKyQAK	Public Relations
Banking	CEO	0057F000001DmKsQAK	Partner
Technology	CEO	0057F000001DmKnQAK	Web

Industry

PROFILE ATTRIBUTES NAVIGATOR

Values from 950 Rows

950 valid values (100%)
0 null values (0%)

Frequent Values

Energy	72
Apparel	67
Technology	62
Banking	61
Insurance	61

[View More](#)

> String Length

A Industry

PROFILE **ATTRIBUTES** NAVIGATOR

API Name

Industry

Field Label

Industry

Field Type

Dimension

Multivalue

A Industry

PROFILE ATTRIBUTES **NAVIGATOR**

- LAST MODIFIED DATE
- OWNER.ROLE.ROLENAMES
- OWNER.UNIQUEUSERNAME
- OWNER.FULLPHOTOURL
- OWNER.SMALLPHOTOURL
- OWNER.ROLE.PARENTROLE.NAME
- OWNER.ROLE.PARENTROLEID
- ACCOUNT NAME
- INDUSTRY**
- OWNER.ROLE.HIERARCHY_ROLENAMES
- OWNER ID
- ACCOUNT SOURCE
- OWNFR.ROLF.NAMF

Add Transformation - Industry X

Substring

Starting Position

String Length

Energy
Apparel
Technology
Insurance
Banking
Engineering

✓ Add

Suggestions
Lowercase
Uppercase
Substring

ACCOUNT ANN...
▼

Hide Column

Formula

Bucket

Add Transformation - Account Annual Revenue X

Bucket

Bucket values by range.

Bucket null values to

Range 1 <

Add>>

Range 2 ≥

✓ Add

Add Transformation ×

Formula

✓ Add

[Help on writing a formula](#)

Add Transformation

Formula

a|

abs	function
[AnnualRevenue]	field
[case.Account.AnnualRevenue]	field
[case.Opportunity.Amount]	field
[case.DurationCalculatedField]	field

[Help on writing a formula](#)

Schedule for 'Account_with_Cases' ✕


Schedule by Week ▾

Start at 12:00 am ▾ America/Los_Angeles

Su M Tu W Th F Sa

Cancel Schedule and Run

Sign in to Salesforce to continue



Standard
 OAuth

Server Url

▼
✓

Login with Salesforce

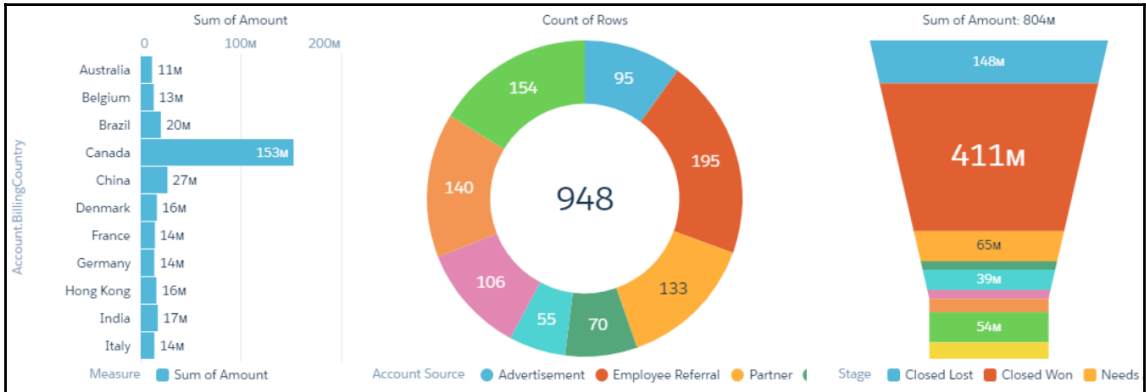
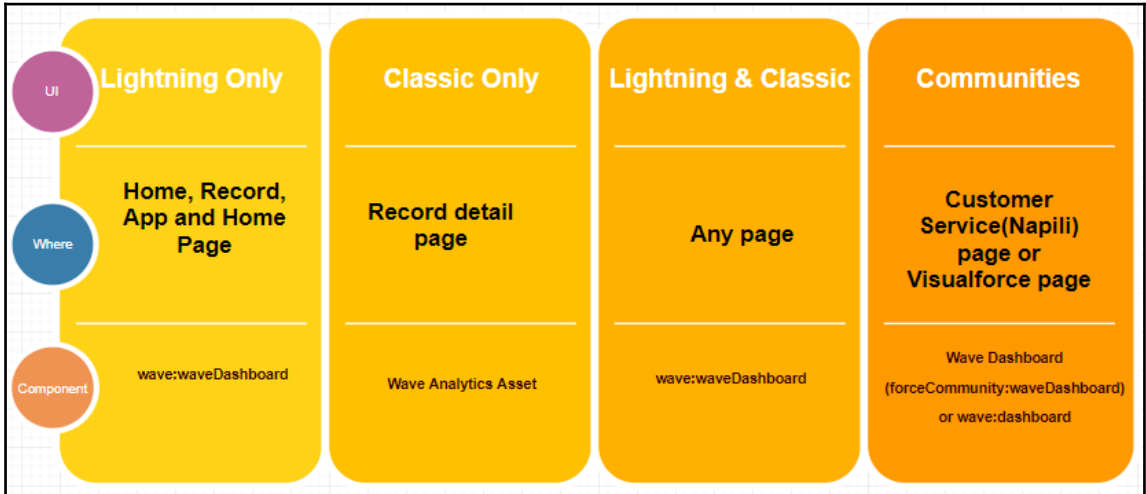
🏠 Salesforce Analytics Cloud Dataset Utils

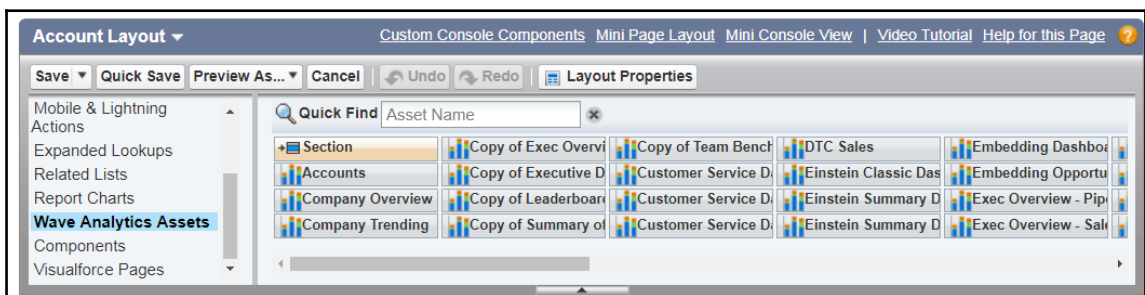
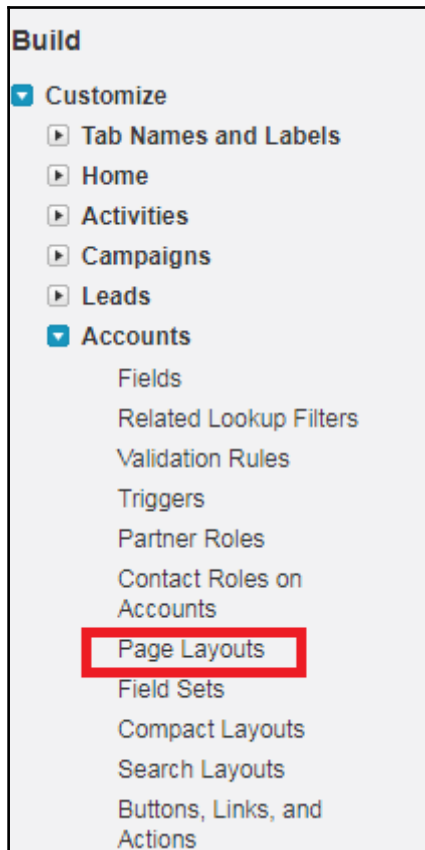
🔍
☰

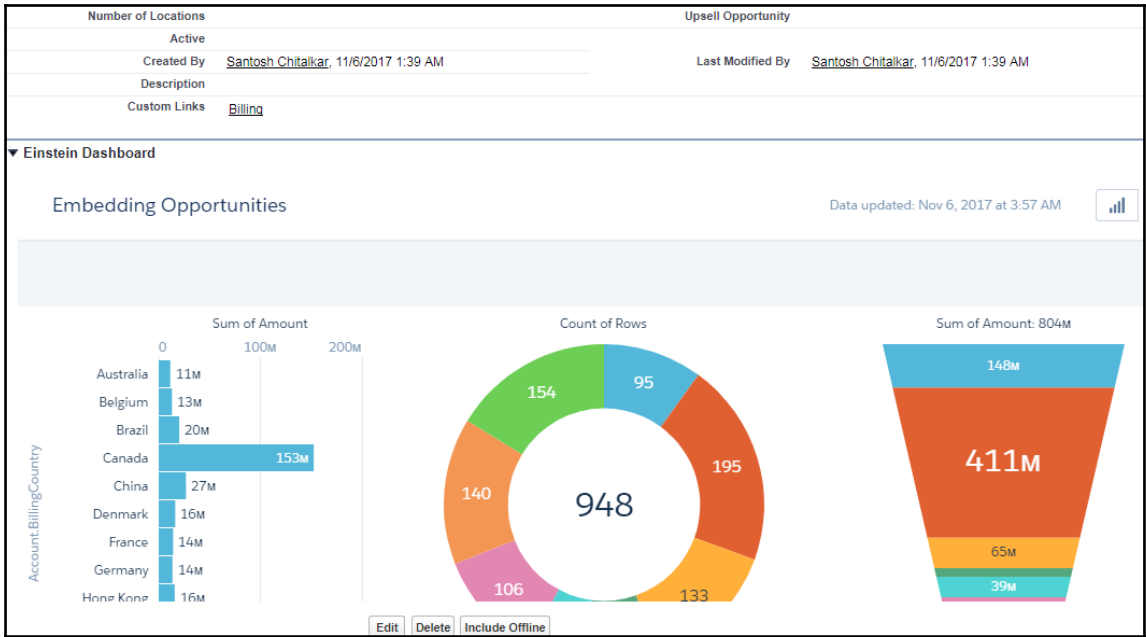
Dataset Count: 37

Dataset Name	App	Modified By	Modified Date	Access Date	Actions
Products	Sales App	Santosh Chitalkar	11/6/2017, 5:23:04 PM	11/29/2017, 11:26:09 AM	Action ▼
Opportunities	Sales App	Santosh Chitalkar	11/6/2017, 5:23:04 PM	11/29/2017, 11:18:01 AM	Action ▼
<u>Account with Cases</u>	Users Private App	Santosh Chitalkar	11/6/2017, 3:16:10 PM	11/19/2017, 10:55:50 AM	Action ▼
sale_activity	Users Private App	Santosh Chitalkar	10/25/2017, 10:01:43 AM	11/3/2017, 4:49:34 PM	Action ▼
sale_pipeline_trending	Users Private App	Santosh Chitalkar	10/25/2017, 10:01:21 AM	11/3/2017, 4:49:34 PM	Action ▼

Chapter 9: Embedding Einstein Dashboards







Asset Properties

Width (in pixels or %):

Height (in pixels):

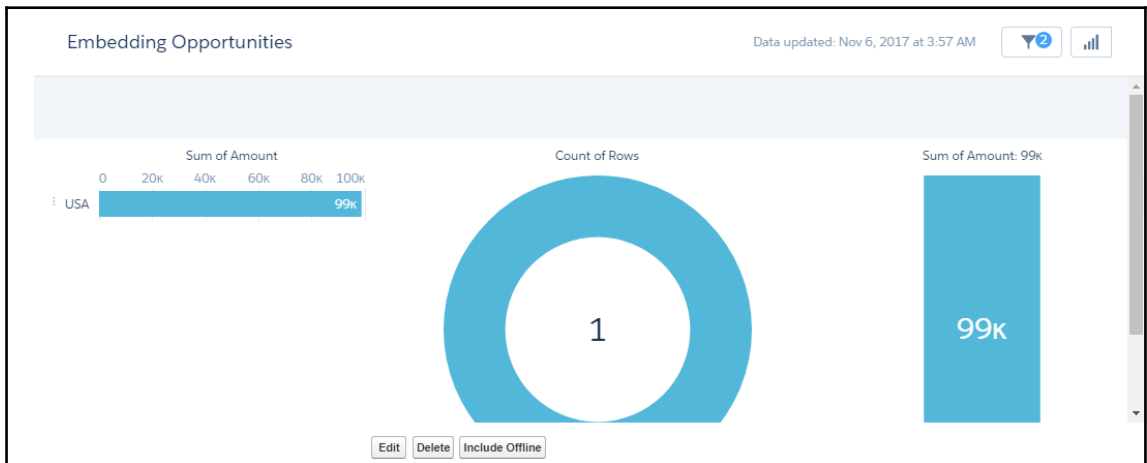
Show Title

Show Sharing Icon

Show Header

Hide on error

Field mapping [i](#)



Create a New Lightning Page

Build a one-page app for Lightning Experience and the mobile app.

App Page

Home Page

Record Page

Next

Create a New Lightning Page

* Label

RecordPage Dashboard

* Object

Opportunity

Back

Next

Create a New Lightning Page

CHOOSE PAGE TEMPLATE

CLONE SALESFORCE DEFAULT PAGE

STANDARD (8)

Header and Left Sidebar

Header and One Column

Header and Right Sidebar

Header and Three Columns

Header, Subheader, Left Sidebar

Header, Subheader, Right Sidebar

One Column

Three Columns



Full-width header above a single main area.

Back

Finish

Desktop Shrink To View Refresh Save Activation...

Lightning Components Search components...

- Tabs
- Trending Topics
- Twitter
- Visualforce
- Wave Dashboard
- Custom (2)
 - ContactPageComp
 - Lookup

Embedding Opportunities (Data updated: Nov 6, 2017 at 3:57 PM)

Page > Wave Dashboard

- Dashboard
 - Embedding Opportunities
- Height: 700
- Filter: [Empty]
- Show Sharing Icon:
- Show Title:

- Show Sharing Icon i
- Show Title i
- Show Header i
- Open Links in New Windows i
- Hide on Error i

Lightning Components

Search components...

- Related Record
- Report Chart
- Rich Text
- Tabs
- Trending Topics
- Twitter
- Visualforce
- Wave Dashboard

▼ Custom (2)

- ContactPageComp
- Lookup

Embedding Opportunities Data updated: Nov 6, 2017 at 10:57 AM

Sum of Amount: Australia (1.4M), USA (2.3M)

Count of Rows: 948 total

Sum of Amount: 3.7M total

Page > Wave Dashboard

* Dashboard

Embedding Opportunities

Height: 700

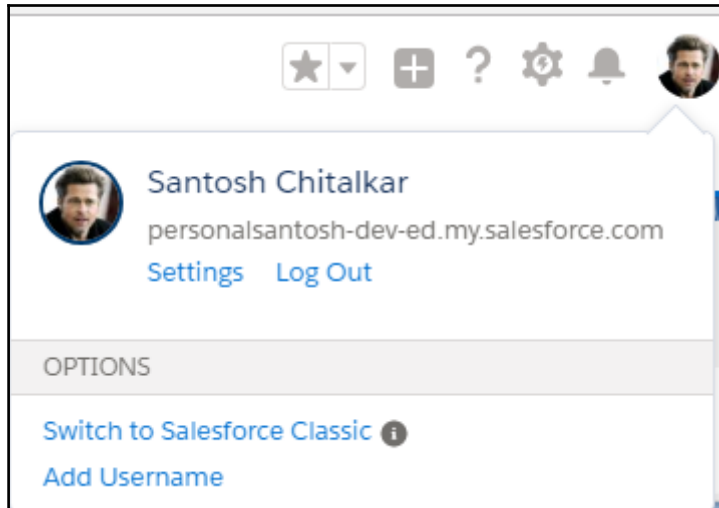
Filter: {datasets:'opportunities';{fields:'Acco

Show Sharing Icon

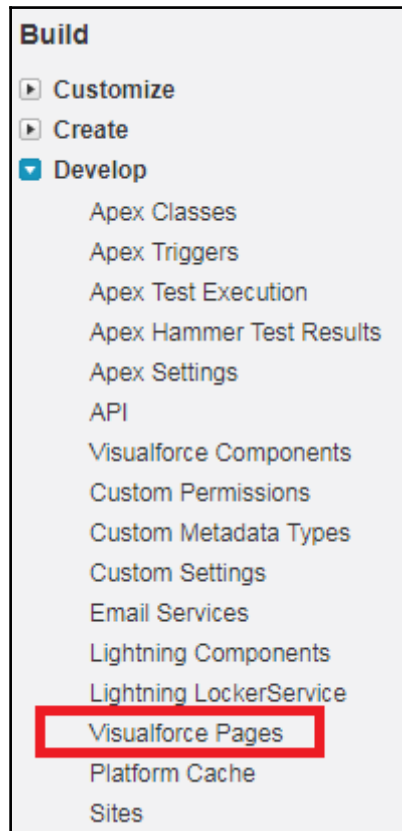
Show Title

Show Header

Secure | <https://personalsantosh-dev-ed.my.salesforce.com/analytics/wave/wave.apexp?tsid=02u7F000000y2ra#dashboard/0FK7F000000HK5WWAW>



The image shows a Salesforce user profile dropdown menu. At the top, there are icons for favorites, a plus sign, help, settings, notifications, and a profile picture. Below this, the user's name "Santosh Chitalkar" is displayed next to a circular profile picture. Underneath the name is the user's email address "personalsantosh-dev-ed.my.salesforce.com" and two links: "Settings" and "Log Out". A grey bar labeled "OPTIONS" is positioned below the profile information. Under the "OPTIONS" bar, there are two links: "Switch to Salesforce Classic" with an information icon, and "Add Username".



The image shows the "Build" menu in Salesforce. The menu is titled "Build" and contains several categories with expandable arrows:

- ▶ Customize
- ▶ Create
- ▼ Develop
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution
 - Apex Hammer Test Results
 - Apex Settings
 - API
 - Visualforce Components
 - Custom Permissions
 - Custom Metadata Types
 - Custom Settings
 - Email Services
 - Lightning Components
 - Lightning LockerService
 - Visualforce Pages**
 - Platform Cache
 - Sites

The "Visualforce Pages" option is highlighted with a red rectangular box.

whi

Expand All | Collapse All

Whitelist for Embedding Wave Dashboards

Below is the list of whitelisted sites that are allowed to embed Wave Dashboards. This list is sent to the browser in the frame-ancestors direct trusted site, click New.

View: [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N

Site Name ↑	Site URL	Active	Created By	Created Date	Last Modified By
No records to display.					

Whitelisted Site Edit

Site Name

Site URL

Description

Active

salesforce 18 Santosh Chitalkar

Home Accounts Chatter Campaigns Leads Contacts Opportunities Reports Dashboards +

commun

Expand All | Collapse All

Communities

Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. [Learn more.](#)

To get started with communities, you must first enable it and select a domain.

Enable communities

Important:
Once you enable communities in your org, you must still create, configure, customize, and then activate a community before it's live and available to users.

After you enable communities, you can assign the View Global Header permission to internal users who need access to the community. The global header allows internal org and any community they're a member of. [Learn more.](#)

Enable communities

Home Accounts Chatter Campaigns Leads Contacts Opportunities Reports Dashboards +

communi ? 🔍

[Expand All](#) | [Collapse All](#)

Communities

✓ Success! You can now create new communities.

The list shows all communities in your organization. Clicking on the URL takes you directly to the

Maximum number of communities: 100 ?

All Communities New Community

No Communities

Administer

- Communication Templates
 - Letterheads
 - Email Templates
 - Mail Merge Templates

Build

- Customize
 - Communities
 - All Communities
 - Communities Settings
 - Lightning Bolt Pages

L I G H T N I N G B O L T

Enter a Name

Not sure what to enter? Don't worry—you can always change it later.

Name

analytics

URL

personalsantosh-developer-edition.ap5.force....

Create

The screenshot shows a Lightning Bolt page for 'Acme Climbing Community'. The page features a header with 'Acme Co.' and a search bar. Below the header, there's a main heading 'Welcome to the Acme Climbing Community!' followed by a sub-heading 'Apex when you can only find solutions and ask questions.' The page is divided into several sections: 'FEATURES' with sub-sections 'DISCUSSIONS' and 'MY FEED'; a grid of six images representing climbing activities; 'Training Articles' with a list of articles; and a 'Leaderboard' with a list of members and their points. At the bottom, there are buttons for 'ASK A QUESTION' and 'CONTACT SUPPORT'.

Quick Find / Search...

Expand All | Collapse All

Lightning Experience Migration Assistant

Switch to the modern, intelligent Salesforce.

Get Started

Salesforce Mobile Quick Start

[Force.com Home](#)

Analytics Settings

Turn on additional Analytics features.

[Save](#)

Settings ! = Required Information

- Enable Replication ?

Replication uses your existing dataflows to determine which objects and fields to replicate. When you enable replication, Analytics validates these dataflows and displays any errors it finds. Fix errors before you continue. Before you enable replication, read [Understand What Happens When You Enable Replication](#).

- Show preview thumbnails for secure lenses and dashboards ?
- Share Analytics with Communities ?
- Grant all users access to Wave API ?
- Enable Wave dashboard designer ?

Home
Accounts
Chatter
Campaigns
Leads
Contacts
Opportunities
Reports
Dashboards
+

communi

Expand All | Collapse All

Administer

- Communication Templates
 - Letterheads
 - Email Templates
 - Mail Merge Templates

Build

- Customize
 - Communities
 - [All Communities](#)
 - Communities Settings

Communities

The list shows all communities in your organization. Clicking on the URL takes you directly to the Community. If you're not a member, the URL isn't link

Maximum number of communities: 100 ?

[New Community](#)

Action	Community Name	Description	URL
Workspaces Builder	analytics		https://personalsantosh-developer-edition.ap5.force.com
Workspaces Builder	analytics2		https://personalsantosh-developer-edition.ap5.force.com/analytics2

My Workspaces

Builder

Build, brand, and customize your community pages.

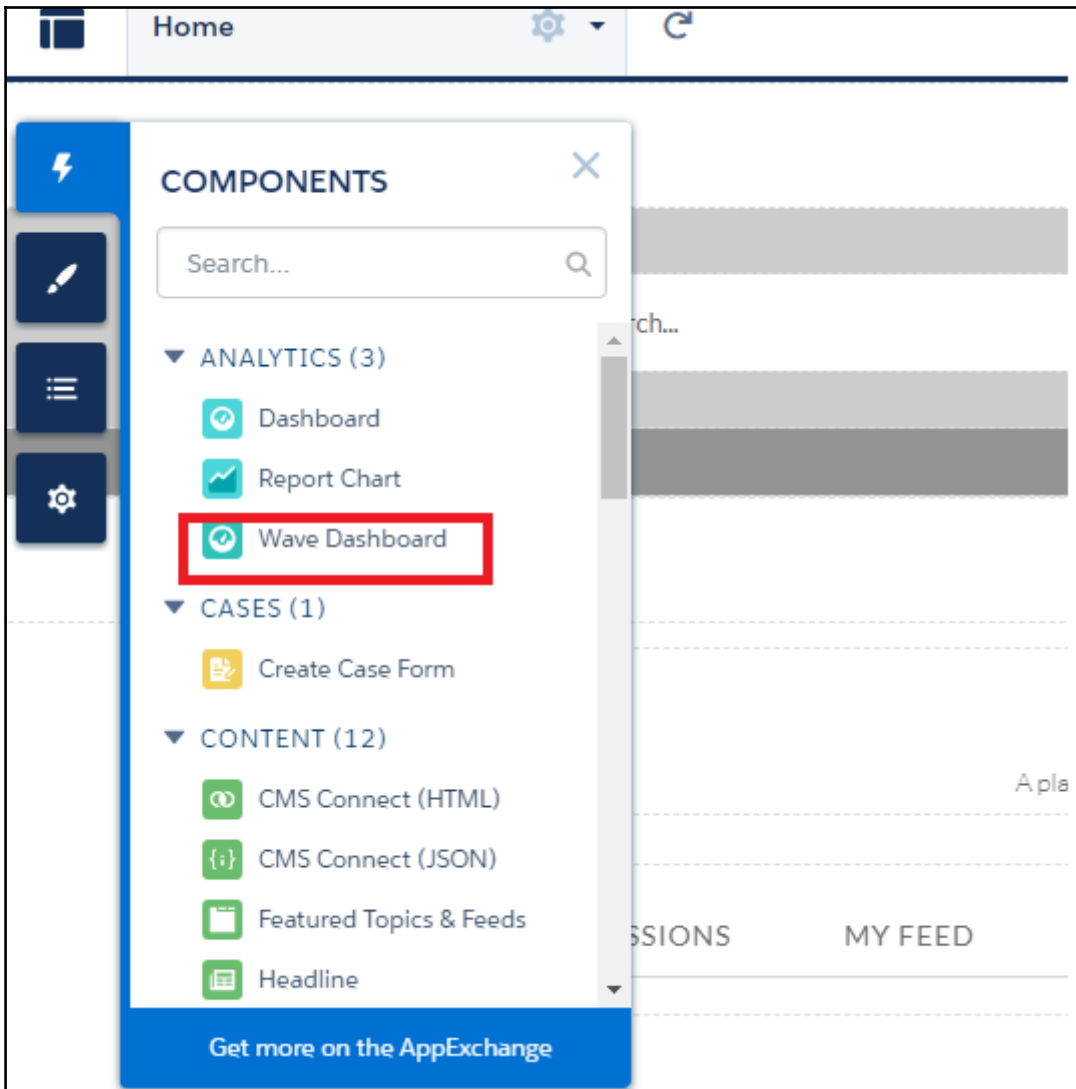
Moderation

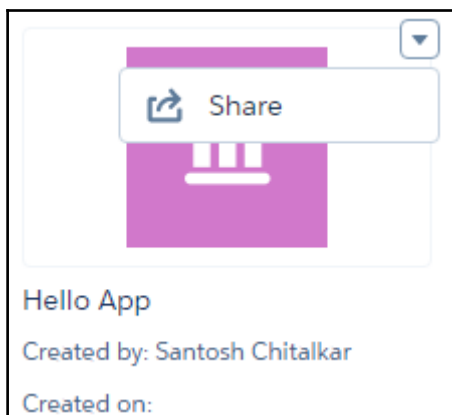
Monitor posts and comments, create rules.

Content Targeting

Recommend resources, use topics to boost visibility, and target content to audiences.

[103]





Hello App ✕

[GIVE ACCESS](#) [POST TO FEED](#) [GET URL](#)

Shared with:

	Entire Organization	None	
	Partner Community Users	None	
	Customer Community Users	None	
	Laura Garza	Manager	

Invite others:

User Viewer

Enable sharing with Communities

Chapter 10: Advanced Technologies in Einstein Analytics

The screenshot displays the Salesforce Analytics Studio interface. At the top, the header shows "Analytics Studio" and "New Lens" with a close button. Below the header is a toolbar with icons for "Dataset Fields", undo, redo, refresh, back, forward, delete, share, save, and settings. The main area is titled "New Lens" and contains a "Query" editor with the following code:

```
1 q = load "opportunity";  
2 q = group q by all;  
3 q = foreach q generate count() as 'count';  
4 q = limit q 2000;
```

To the right of the query editor is a "Run Query" button. Below the query editor, a small table displays the results:

Count of Rows
706

Query

```
1 q = load "opportunity";  
2 q = group q by all;  
3 q = foreach q generate count() as 'count';  
4 q = limit q 2000;
```

Count of Rows

706

Query

```
1 q = load "opportunity";  
2 q = group q by all;  
3 q = foreach q generate sum('Amount') as 'Sum Amount';  
4 q = limit q 2000;
```

Sum Amount

803889633

Query

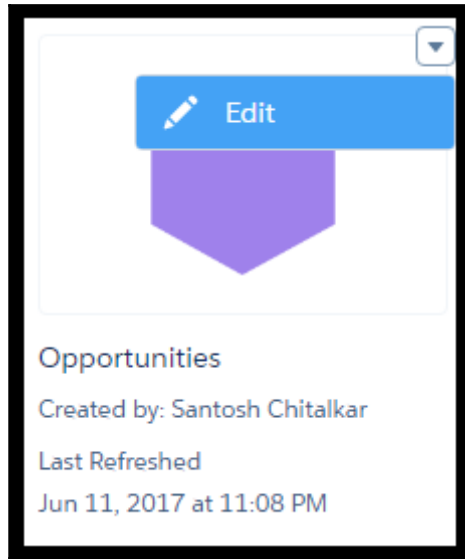
```
1 q = load "opportunity";  
2 q = group q by 'StageName';  
3 q = foreach q generate q.'StageName' as 'stagename', sum('Amount') as 'Sum Amount';  
4 q = limit q 2000;|
```

stagename	Sum Amount
Closed Lost	147732926
Closed Won	411142888
Needs Analysis	64842060
Negotiation/Review	17044891
Perception Analysis	38981892

Query

```
1 q = load "opportunity";  
2 q = filter q by 'Amount' > 5400000;  
3 q = group q by 'StageName';  
4 q = foreach q generate 'StageName' as 'StageName', sum('Amount') as 'Sum Amount';  
5 q = limit q 2000;
```

Stage	Sum Amount
Closed Lost	5423800
Closed Won	7747190
Perception Analysis	14417105



The screenshot shows a mobile application interface. At the top, there is a blue button with a white pencil icon and the text "Edit". Below the button is a purple shield-shaped icon. The card is titled "Opportunities" and contains the following text: "Created by: Santosh Chitalkar", "Last Refreshed", and "Jun 11, 2017 at 11:08 PM".

Opportunities


Created by: Santosh Chitalkar

Last Refreshed

Jun 11, 2017 at 11:08 PM



DATASET

Opportunities 

API Name	Last Updated	Created By	Created
opportunities	Jun 16, 2017 at 2:54 AM	Santosh Chitalkar	Jun 16, 2017 at 12:59 AM

App



Shared App 

Extended Metadata File



opportunities.xmd.json



Download

Replace


Usage

This dataset is used in these places

Dashboards

Dataflows

✎ Edit

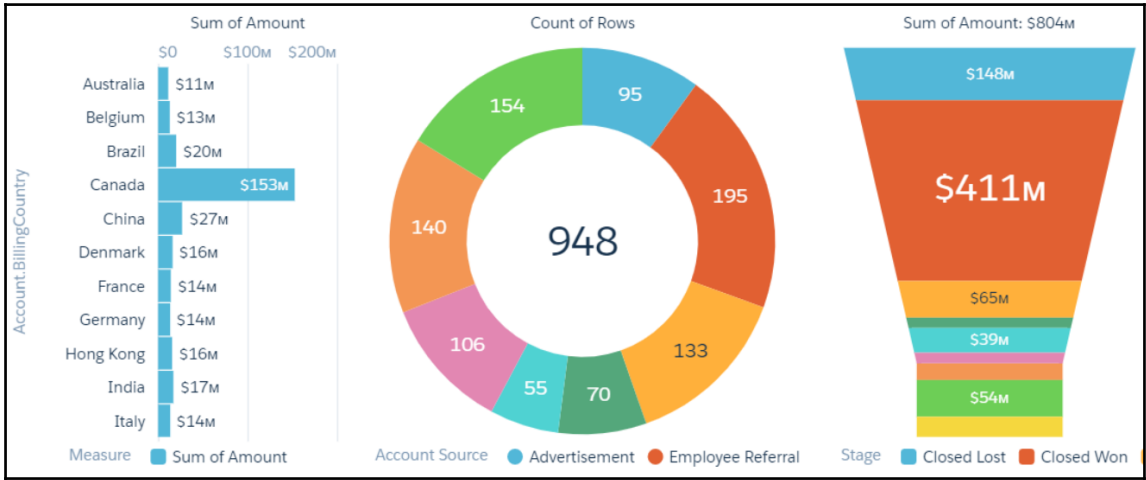


Opportunities

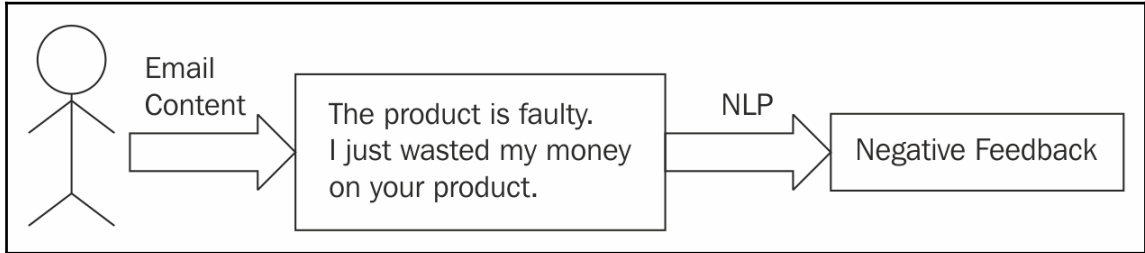
Created by: Santosh Chitalkar

Last Refreshed

Jun 11, 2017 at 11:08 PM



Chapter 11: Machine Learning and Deep Learning



Index