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1.ActivateAudience onDestinations .....

221.ActivateAudience onDestinations

Activation istheprocess oflinkingthecohortofcustomers tovariousadvertising platforms, suchasFacebook, Adform, Twitterandmore.Thisallowsyoutoimplement focused marketing strategies thatalignwiththecriteriaestablished forthetargetcohort.

Afterdefining theaudience, youcanactivateitonaDestination eitherimmediately oryou canchoosetoactivateitlater.YoucanrevisitthisAudience laterforfurthermodifications.

ToactivatetheDestination immediately, afterdefining thecriteriaforyourAudience, on thelastscreenof theAudience creation, click Activate Now.

This takesyou to anewscreen,whereyoucaneitherchoosetoenableA/Btesting ontheAudience oractivatethecreatedaudience bylinkingittoaspecific Destination asshownintheimagebelow.

oSetA/BTest -Thisfunctionality isexclusively available foruserswhohave optedforit.Selecting thisoptiontakesyoutoascreenwhereyoucansplit theaudience intotwoormorevariations. Formoreinformation aboutAB testinganditsapplication, refer here.

oLinktoDestination -Thisfunctionality helpsyoutoactivatethecreated Audience bylinkingtoaDestination. Forstep-by-stepinstructions onhowto3activateanAudience, refer here.

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**File Name: best-practices-for-using-zeotap-cdp.pdf**

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1.BestPractices forusingZeotapCDP .....

221.BestPractices forusingZeotapCDP

Thissectionoffershelpsyowiththebestpractices andrecommendations toaccurately  
setuptheZeotapCDPaccount acrossdifferent implementation stages.Thissection  
coversthefollowing topics:

Validating DatabeforeOnboarding

SettingUpOrganisation andUser

SettingUpSources

SettingUpDestinations

SettingUpPredictive Audience

SettingUpJourneys

SettingUpConsent Orchestration

SettingUpProfileAPI

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**File Name: create-calculated-attributes.pdf**

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221.CreateCalculated Attributes

Thisstepallowsyoutoderiveuser-levelinsightsbyaggregating yourusers'isolated actions.Youcanthenusethisdatatocreatemorepowerful customer cohorts.

Asamarketer, youcanusecalculated attributes tocreatenewattributes forouserby aggregating theirerentdataoveraspecifictimeperiod.Forexample, 90\_day\_revenue of auser, 1\_week\_page\_views tochecktheengagement ofauser, units\_purchased bya userforaspecificcategory likeT-shirts.

Thesecalculated attributes areusedassegmenting criteriaandcanthenbeforwarded to different integrations. For example, inaworkflow, youcandefine High Spenders as users with 90\_day\_revenue > 500 or Low Engagement Users by putting 1\_week\_page\_views <5 criteria. Formoreinformation aboutCalculated Attributes, refer here.

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1.CreateaSource.....

221.CreateaSource

To get started with Zeotap CDP, begin by creating a new source to bring data to Zeotap CDP. You must also select a source category that aligns with your specific needs and create the source accordingly.

The following are the various source categories supported in Zeotap CDP:

**Website Events:** To send data from your websites to Zeotap CDP, the following are the two commonly used methods/files to implement website event tracking:

- o **WebJS:** This is a client-side library that can be implemented on websites to track events, page visit information, user logins, user details and any other information relating to the product or services offered on the website. For more information about WebJS source, refer [here](#).

- o **Pixel files:** Also known as tracking pixels or web beacons, are small, invisible elements embedded within web pages to collect information about user behaviour and interactions. For more information about Pixel files, refer [here](#).

**App Events:** To collect customer data in mobile applications, we integrate our native Android and iOS SDKs (Software Development Kits). These SDKs track user interactions and capture events within the app. The following are the two native SDKs available in the system:

- o **Android SDK:** This is designed to support all Android devices and tablets, including Amazon Fire TV. The SDK simplifies the process of sending data to any tool without having to implement a new API every time. For more information about Android SDK, refer [here](#).

- o **iOS SDK:** This supports all iOS devices and tablets. The SDK simplifies the process of sending the data from your iOS app to Zeotap. For more information about iOS SDK, refer [here](#).

**Flat Files:** To store data collected from external sources, often in formats like CSV or JSON, which can be directly uploaded from the Sources user interface or through other methods like the GCloud Console, GSUtils, or through third-party tools like

Cyberduck. The following are the two ways for transferring batch data using Flat

Files:

- o Zeotap Google Cloud Storage, Zeotap supports importing of data collected

from other sources or stored outside Collect onto the platform. This data can

be in the form of CSV or JSON files. For more information about Zeotap

Google Cloud Storage, refer [here](#).

- o SFTP (Secure File Transfer Protocol), Sources supports importing of data

collected from other sources or stored outside Sources onto the platform. As

an organisation, you can use the SFTP source to onboard your data to

Zeotap's SFTP server using one of the different modes of connection that we

recommend. For more information about Zeotap SFTP Sources, refer [here](#).

Server to Server: Sources can be registered for server-to-server data transfer under

the HTTP API source. The Source details contain the API endpoint and the

write\_key to be used for sending the data.

Tag Managers : Provides a user-friendly interface that allows marketers and website

administrators to add, update, and manage tracking codes without the need for

direct involvement from developers or frequent code changes on the website. The

following are the two popular tag managers that Zeotap offers:

- o Adobe Experience Platform Tag Extension, Zeotap provides the Zeotap

Collect Tag Extension within the Adobe Experience Platform marketplace to

capture events and user identities and enable cookiesyncing on the Web.

For more information about Adobe Experience Platform Tag Extension, refer

[here](#).

- o Google Tag Manager, The Zeotap Collect Tag is available as a custom

template on Google Tag Manager for easy integration. This is a JavaScript

tag that captures events and user information as the customers navigate

your websites. For more information about Google Tag Manager, refer [here](#). 4 CRMD Data: refer to the comprehensive

set of information about customers and

their interactions with a business that is stored and managed within the CRM

platform. The following are the CRM Data Source integrations that Zeotap offers:

- o Salesforce CRM, The Sources module supports importing data from the

Salesforce CRM. Salesforce CRM stores data as standard objects that are

like tables. For more information about Salesforce CRM, refer [here](#).

**Data Warehouse :** A Data Warehouse is a centralised and integrated repository that

stores large volumes of structured and unstructured data from various sources. The

following are the Data Warehouse integrations that Zeotap offers:

- o Snowflake , Zeotap brings simplicity to your data onboarding process by

letting you connect directly to your source data residing in Snowflake through

Sources. For more information about Snowflake, refer [here](#).

- o BigQuery , Zeotap simplifies your data onboarding process by letting you

connect directly to your source data residing in BigQuery through Sources.

For more information about BigQuery, refer [here](#).

- o Amazon S3, Zeotap brings simplicity to your data onboarding process by

letting you connect directly to your source data residing in Amazon (AWS) S3

through the Sources module of Zeotap CDP. Note that you can configure

auto-sync of data between your S3 account and the source created in Zeotap

CDP by using the Sync Frequency feature. For more information about

BigQuery, refer [here](#).

**Customer Engagement Channels :** These are powerful tools that enable businesses

to interact with customers across multiple touchpoints, deliver personalised

experiences, and collect valuable data on customer preferences, behaviours, and

responses. The following are the Customer Engagement Channels Source

Integrations that Zeotap offers:

- o Braze Currents 5.0 Batch

- oDotdigital

- oHubSpot Source

- oAirshipBatch

- oAirshipReal-TimeDataStreaming

- oCleverpush (Batch)Source

- oCleverpush (Real-Time)Source

Message Queue:

A message queue is like a buffer that receives messages in a specific order and forwards them to the concerned sub-system or application in the same order.

Message queues decouple the sender and recipient, allowing them to operate independently and at their own pace. Consumers retrieve messages from the queue when they are ready to process them. They can retrieve and process messages independently and at their own pace, allowing for asynchronous processing.

The following are the message Queue integration that Zeota offers:

- oPub/Sub Stream,

Pub/Sub (Publish/Subscribe) Stream is a messaging pattern that allows different applications and services to communicate with each other in real-time. In a Pub/Sub system, messages are published to a central exchange (or "topic") and subscribed to by various recipients. The recipients receive notifications or data as soon as new messages are published, which makes it an efficient and scalable way to exchange information in real-time.

For more information about Pub/Sub Stream, refer [here](#).

- oPub/Sub Batch,

Pub/Sub (Publish/Subscribe) Batch upload is a way to efficiently and reliably send multiple messages to Pub/Sub topics in a single request. This feature allows you to save network requests and improve the performance and scalability of your applications. In Pub/Sub Batch upload, you create a batch

filecontaining allthemessages youwanttosend.Thebatchfilecanberead  
asoftenasnecessary, butonceitisexhausted, onlynewmessages are  
sent.Pub/Sub Batchuploadisusefulforprocessing largenumbers of  
messages atonceinreal-timeapplications, aswellasinback-endprocesses  
thatprocess dataovertime

.Formoreinformation aboutPub/Sub Batch,referhere.

HowZeotapCDPWorks

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Thefollowing arethestepsinvolved increation of Audiences in Zeotap CDP:

Create Audience: Uponsuccessfully creating asourceandingesting yourdata into  
theZeotapsystem,thenextstepinvolves unifyingthisdata by mapping ittothe  
corresponding fieldsontheCatalogue .Subsequently, youcanproceed tocreatea  
cohortofcustomers, commonly referred toas Audience asperyourusecase.

DefineCriteriaforYour Audience: Further, definethecriteriaforthe  
created Audience toqualifycustomers (unified profiles). You canleverage the  
available attribute typetodefineyourAudience andcreatetheoptimalmarketing



strategy for them. The attribute types include attributes such as Events, Profile attributes, Calculated attributes, Consent, Marketing preferences and more. To know more about attributes and how to apply them to your Audience, refer here.

Create Calculated Attributes

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**File Name: data-or-catalogue-definition.pdf**

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1. Data or Catalogue Definition .....

2.1 Data or Catalogue Definition

In this stage, you need to define the incoming fields and map it to the respective Zeotap

Catalogue field, specify the sensitivity of the data, define consent and more.

Develop a schema document with transformation requirements

Define the data model

Define the sensitivity of the data

Establish Time-To-Live strategy

Define the granular consent fields

Provide sample files for testing

Finalise the Enrichers to use

Develop a schema document with transformation requirements

Ensure that you develop a schema document for each source, along with the following

details:

A schema document is a structured document that outlines the format, structure, and specifications of data within a dataset. In the context of your requirement, it serves as a comprehensive guide for handling data transformation needs.

Confirm the presence of at least one ID, Consent and Country field.

Explicitly map incoming fields to the corresponding Zeotap Catalogue field in the schema document.

Specify consent details, considering the customer's desired consent type, applicable channels and the creation of custom consent fields if the source lacks an explicit consent field.

When no specific consent field exists, consider the entire dataset as consented for all purposes.

Define the data model 3 Define the consolidated data model obtained during the discovery stage, covering event, profile and other custom attributes.

Define the sensitivity of the data

Specify the sensitivity of data, including Personally Identifiable Information (PII) and other sensitive data. PII and sensitive data are masked within the product and Special

Personally Identifiable Information (SPII) data must be classified as PII data.

Establish Time-to-Live (TTL) strategy

Establish the Time-to-Live (TTL) strategy for both persistent and non-persistent IDs.

Time-to-Live (TTL) is a strategy that defines the lifespan or expiration period of data within a system. It specifies the duration for which data, particularly identifiers (IDs), remains valid and accessible. The TTL strategy is crucial for managing data freshness, security, and compliance with privacy regulations.

Persistent IDs typically have a longer TTL, often set to "Forever." These identifiers, like customer-specific IDs, are meant to persist indefinitely.

Non-persistent IDs, on the other hand, have a defined TTL after which they expire. This

duration is determined by the TTL strategy and ensures that outdated or irrelevant data is not retained unnecessarily.

Define the granular consent fields

Define the Granular Consent fields for each source along with the following details:

Identify the attributes denoting consent.

Determine the customer's desired consent type.

Define the applicable channels for consent. In cases where the source lacks an

explicit consent field, establish a custom consent field and generate a hard-coded or

derived enricher. If no specific consent field exists, the platform considers the

complete data as consented for all purposes.

Provide sample files 4 Provide sample files to Zeotap for testing purposes, adhering to best practices and recommendations for various source types.

Finalise the Enrichers to use

Gather a list of required enrichers, such as Date-Time and Currency Transformations. For an exhaustive list of available enricher types within the system, refer here.

Discovery

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1. Discovery .....

## 221.Discovery

In the Discovery phase, you can start by defining your use cases and understanding your customers' requirements. Prioritise use cases and map out data sources, destinations, usage timelines and more. You need to get clarity from your customers on the following aspects of using a CDP for their use case. By adhering to the instructions below, ensures a fast, hassle-free and successful integration.

Get prioritised list of use cases for using Zeotap CDP

Get prioritised list of Sources to integrate with Zeotap

Get prioritised list of Destinations to target your customers

Gather use cases for Profile API

Gather use cases for Calculated Attributes

Gather use cases for Journeys

Other general requirements

Get prioritised list of use cases for using Zeotap CDP

Obtain a prioritised list of use cases that your customers intend to address using Zeotap CDP. This helps you to align the integration with their specific needs and objectives. For each use case, ensure to map out the Source, Destination and establish clear timelines for when they plan to employ them. This level of detail ensures that the integration is precisely tailored to their requirements. For information about some of the real-time use cases that we have solved through Zeotap CDP, refer [here](#).

Get prioritised list of Sources to integrate with Zeotap CDP

Obtain the prioritised list of Sources, which you wish to integrate with Zeotap CDP for transferring your customer data. In addition, ensure that you have the following details

readily available	regarding	the Source Integration:	3	Datamodel
-------------------	-----------	-------------------------	---	-----------

-Ensure that you have clearly defined the fields that you wish to send to

Zeotap through source integration.

Onboarding Format- Specify the preferred method for onboarding, such as Flatfile,

API, Datawarehouse, SDK, or other applicable formats.

**Managing Deltas**-Verify that customers adhere to the practice of sending only delta updates, especially when utilizing Flat Files or establishing configurations within DB tables. This ensures the efficient and incremental transfer of data, minimising redundancy.

**Get prioritised list of Destinations to target your customers**

Obtain the prioritised list of Destinations to concentrate your marketing efforts on targeting specific customer cohorts. In addition, ensure that you have the following details readily available regarding the Destination Integration:

**Credentials of the Platforms** - Secure the necessary credentials for the identified Platforms. To understand the difference between Platforms and Destinations, refer [here](#).

**Use Cases to be Activated** - Be clear about the use cases to be activated on the Destinations. For example, suppression, creating look-a-likes in the platforms and more.

**Preferred Output Data Fields**- Define the preferred output identifiers for each platform. For example, for Facebook - emails, MAIDs, or both; for Braze - First name, Lastname, email, Braze ID and soon.

**Gather use cases for Profile API**

You can use our Profile API to read, write and delete the user profiles from the Zeotap system. Ensure that you have the following details readily available for effective use of our Profile API:

**Identify Data for Profile API**- Specify the data intended for utilisation through the Profile API, such as segment membership or other profile attributes. Note that event data is not supported through Profile API.

**Delete API Caller**- Clearly define the caller of the Delete API and the responsible system or individual for the Delete API operation.

4 Gather use cases for Calculated Attributes

For Calculate Attributes, identify the use case and possible conditions that you want to achieve.

For example, create a lead score for routing the lead to specific sales representatives.

For example, to show a welcome back banner to people who did not login in the last 7 days, pre-create a Calculated Attribute counting last\_7\_days\_login.

To target a customer when they are reviewing a product they have been most engaged with, pre-create a Calculated Attribute tracking most\_viewed\_product in the last 3 days.

Gather use cases for Journeys

For you to be able to use Journeys and create workflows, ensure the following:

You have a real-time streaming source created in Sources.

You have mapped the streaming source in your Catalogue.

Other general requirements

Below are the general requirements that can be considered during Discovery:

Collect your precise Country/Region requirements.

Inform that default support for the EU is available; approval is required in the contract for other regions in terms of Data Residency.

For more information about Profile API, use cases for Profile API, workflow of the API, endpoint, best practices and more, refer [here](#).

Calculated Attributes are computed daily and exclusively supported for events data.

A workflow runs on the Event Name and other attributes that are mapped in the Catalogue. Hence, ensure that the above points are taken care of.

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221.GetStartedwithZeotapCDP

Welcome toZeotapCDP,yourgateway toauser-friendlyCustomer DataPlatform that streamlines dataintegration, enriches customer profiles, enables precise segmentation and facilitates personalised marketing acrossmultipleplatforms.

Thisdocument is designed toprovideyou thecrucialinitialstepstogetstartedwithZeotap CDPandgivesyouacomprehensive overview ofZeotap's capabilities. Italso helps you to seamlessly integrate andutiliseyourdatawithZeotapCDP.Whether youare new todata-drivenplatforms oranexperienced user,thisdocument willwalkyouthroughthe prerequisites stepsthatareessential beforesettingup your Zeotap CDPaccount, the overallworkflow ofZeotapCDPandthebestpractices tobefollowed whileusingZeotap CDP.

Thissectioncoversthefollowing topics:

Introduction

BeforeyourBegin(Prerequisites)

HowZeotapCDPworks

BestPractices forusingZeotapCDP

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221.HowZeotapCDPWorks

Aftergathering allnecessary customer information asoutlined in  
the prerequisites section, you cangetstartedwith Zeotap CDP inthefollowing order:

- 1.CreateaSource
- 2.Implement the Source
- 3.Preview Data
- 4.Mapthe Catalogue
- 5.CreateCalculated Attributes
- 6.CreateAudience
- 7.Activate Audience onDestinations

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221.SetupIDStrategy

Ensurethatyoupreparethesource-specificdatadictionary (listingattributes fromeach source)andadatamodel(illustrating therelationships between eachsourceandtheir respective identifiers) beforeproceeding withtheconfiguration oftheIDstrategy.

Werecommend youto develop anIDCatalogue document todefinereationships between identifiers forthelDstrategy configuration ,including allrelevant identifiers withinyour account's catalogue. OncetheIDstrategy configuration isfinalised, document the corresponding datascenarios andreplicate theminthe Zeotap CDPinterface. Following that,youcansetupyourIDconfiguration. Formoreinformation abouthowtoconfigure the IDstrategy foryouraccount, refer here.

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Bydefault,weenablethe IdentifyandlinkusingallIDs option,whichtakesinto account allthelDattributes acrosssources for resolving orcreating userprofiles.

Notethatthisisanirreversible process. Anychanges doneaftersourcecreation areonly applicable tothenewdatathatisingested.

Oncethedatamapping iscomplete, the customer profilesarecreatedandunified asperthelDstrategy activeintheaccount.

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221.SetupIDStrategy

Ensurethatyoupreparethesource-specificdatadictionary (listingattributes fromeach source)andadatamodel(illustrating therelationships between eachsourceandtheir respective identifiers) beforeproceeding withtheconfiguration oftheIDstrategy.

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Notethatthisisanirreversible process. Anychanges doneaftersourcecreation areonly applicable tothenewdatathatisingested.

Oncethedatamapping iscomplete, the customer profilesarecreatedandunified aspertheIDstrategy activeintheaccount.

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1.Implement theSource.....

221.Implement theSource

Oncethesourceiscreated, proceed withitsimplementation. Refertothe step-by-step instructions provided intheImplementation guidetailoredtothechosenSourceType.You candownload thisdocument fromthe IMPLEMENTATION DETAILS tabofthesourcethat youcreated.

Toimplement a WebJSSource,referhere.

Toimplement aPixelSource,referhere.

Toimplement PixelsonaSite,AdorCampaign ,referhere.

Toimplement AndroidSDKSource,referhere.

Toimplement iOSSDKSource,referhere.

Toimplement areactnativepackage, referhere.

Toimplement ZeotapGoogleCloudStorageSource,referhere.

Toimplement SFTP(Push) Source,referhere.

Toimplement SFTP(Pull) Source,referhere.

Toimplement ServertoServerSource,referhere.

Toimplement AdobeExperience Platform TagExtension Source,referhere.

Toimplement GoogleTagManager Source,referhere.

Toimplement BigQuery Source,referhere.

Toimplement Snowflake Source,referhere.

Toimplement Amazon S3Source,referhere.3 Toimplement BatchSource,referhere.

Toimplement BrazeCurrents Source,referhere.

Toimplement Dotdigital Source,referhere.

Toimplement HubSpot Source ,referhere.

Toimplement Airship (Batch) Source,referhere.

Toimplement Airship (Real -time)Source,referhere.

Toimplement Cleverpush (Batch) Source,referhere.

Toimplement Cleverpush (Real -time)Source,referhere.

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## File Name: introduction.pdf

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221.Introduction

Inanutshell, youfirstcreateasourcewithinZeotapCDPtogatheryourcustomer data (likeeventsfromyoursiteorapp)processed eitherinbatches orreal-time.Channel this plethora of dataintotheZeotapsysteminaspecificformatbymapping yourincoming fieldstoZeotapCatalogue fields.Thisformsunifiedprofiles ofyourcustomers inthe Zeotapsystembasedontheconfigured IDStrategy.Youcanthenmakeuseofanother toolofZeotapCDP called Segment ,tcreate cohorts ofyourcustomers, knownas Audiences/segments. Finally,linktheseAudiences/segments tooutbound platforms such asFacebook, Snapchat, Airship,Batchandsoon,toachieveyourusecaseusinganother Zeotaptoolnamed Destinations .3

#### 4 Use cases

The following are some of the use cases that can be solved using Zeotap CDP:

**Unified Customer Profiles:** CDP aggregates customer data from various sources to create unified profiles, ensuring a comprehensive understanding of individual customer behaviours and preferences.

**Personalised Marketing:** CDP enables businesses to deliver personalised marketing messages by analysing customer data, enhancing the effectiveness of campaigns and increasing customer engagement.

**Real-time Data Access:** CDP provides real-time access to customer data, empowering businesses to respond promptly to customer interactions and deliver timely and relevant communication.

**Cross-Channel Coordination:** CDP ensures consistent messaging across different channels, maintaining a cohesive brand image and improving the overall customer experience.

**Optimised Campaigns:** CDP-driven insights refine marketing campaigns, improving targeting accuracy and maximizing Return on Investment (ROI) by tailoring strategies based on customer behaviour.

**Customer Retention Strategies:** CDP identifies potential churn indicators, allowing businesses to implement proactive customer retention strategies and personalised engagement to retain valuable customers.

**Compliance with Data Protection Regulations:** CDP centralises customer data management, facilitating compliance with data protection regulations by ensuring secure and organised handling of customer information.

**Effective Suppression of Existing Customers:** CDP suppresses existing customers from marketing campaigns to prevent repeated targeting, reducing marketing fatigue, and avoiding unnecessary outreach to those already engaged.

**Optimising Loyalty Programs:** CDP supports loyalty programs by tailoring

promotions based on individual customer profiles, increasing customer engagement, and fostering loyalty through targeted incentives.

Preventing Customer Fatigue: CDP analyses customer interaction patterns to detect signs of fatigue, enabling businesses to adjust marketing strategies and content to maintain customer interest and satisfaction.

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1. Map the Catalogue .....

2.1 Map the Catalogue

This is the stage in which you can standardise the incoming data to a single organisational -level catalogue by mapping and applying the required data transformations . Ensure that your ingested data such as identifiers, traits, consent, events and more are appropriately mapped against the fields available in the Zeotap Catalogue. This ensures the structuring of the data flow efficiently. Map the ingested fields to the Catalogue fields by clicking Map to Catalogue under either the CATALOGUE MAPPING or PREVIEW DATA tab.

The following are the important steps that you need to know while performing the Catalogue Mapping:

1. Mapping Customer and Non-Customer Entity Data: You can map both Customer

Data and Non-Customer EntityData intheCatalogue. Formoreinformation about thehowtomaptheCatalogue forCustomer dataandNon-Customer EntityData, refer here.

2.Knowing ZeotapStandard Fields -Zeotaprovides asetofstandard fieldsinyour catalogue. Ifyoudonotfindthesestandard fieldsinyourorganisation's catalogue, youcancreatecustomfields.Theprocessofcreating thecustomfieldshappens in aninteractive interface wherein youcandefineyourdatapoints,bringtheminto Zeotapandmanage themindependently. Usingthisinterface, youcaneasilyedit theexistingcatalogue fieldorcreateanewfield.Formoreinformation aboutthe standard fields,refertotherelevant belowlinks.

3oZeotapStandard Fields

oReserved Catalogue Fields

3.AddaCatalogue field -WhileaddinganewCatalogue field,searchfortheddesired fieldyouwishtoadd.Ifthefieldisalreadypresentinthesystem,youareprompted tousetheexistingfieldandcanaccesstheDETAILSpage.However, ifthefielddoes notexistinthesystem,youhavetocreateanewfieldasexplained inthe Adda Catalogue field topic.

4.Configure Enrichers -Afteraddingthefields,youhavetoconfigure therequired Enrichers. Enrichers arequickfunctions available foryoutoperform data transformations. Zeotapenrichers canbebroadlyclassified as DataTransformation Enrichers and CustomEnrichers .

5.MaptheConsent Purposes -Onceyouhavemapped allthelIdentifiers, onthe samescreen,click +ADDMAPPING . Ifasourcehasconsentdata,thenselectthe incoming consentfieldandmapittotherelevant Zeotapconsentfield.Formore information aboutmapping theconsentpurposes, refer here.

6.MaptheMarketing Preferences -Capture marketing preferences alongwith consenttoaddclarityandassurance tothemarketing teamwhiledesigning the campaign fortherightaudience. Formoreinformation aboutmapping the

Marketing Preferences, refer here.

7. Review Mapping - In the REVIEW MAPPING screen that appears, you can find warnings along with error logs that provide a description of the issue for incorrectly mapped fields. Once you have corrected these fields, the system automatically refreshes, allowing the warning to disappear. For more information about reviewing the mapping, refer here.

8. Save Mapping - When you have reviewed all the fields, click CONFIRM AND SAVE.

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Once the mapping is successfully done, then the source transitions to Mapped state. 4 Questions? Problems? Need more info? Contact us, and we can help!

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**File Name: prerequisites.pdf**

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2 2. Before you Begin

Before you start using Zeotap CDP, ensure that you address the following prerequisites and obtain the necessary information outlined in each requirement:

1. Discovery : Begin by defining your use cases and understanding your customers' requirements. Prioritise use cases and map out data sources, destinations, usage timelines and more.

2. Data or Catalogue Definition : Subsequently, gain an understanding of your



customers' datamodels, fields,dataonboarding formats, deltamanagement and more.

3.IDStrategy:Duringthisphase,itiscrucialtoformulate yourstrategy for identification management. Determine howyoucaneffectively handledata identification andintegration toachieveoptimaloutcomes withZeotapCDP.

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Beforestartingwithdiscovery, ensurethatyougetthefollowing information asper thepre-salescycle:

Handover checklist

Usageexpectation

Thisinformation iscrucialasitsetsthebasefortheoverallonboarding process.

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1.PreviewData.....

221.PreviewData

Aftersuccessfully implementing thesource,youcanexamine thedatathathas been received into thesystemunderthe PREVIEW DATA tab.Notethatoncethedata startsflowingintothesystem,thestatusofthesourcechanges to Integrated .

Implement theSource

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If no data is ingested, then a message stating "We haven't received any data yet."

please check again later and ensure that the

source is implemented correctly. In case of any

issues, contact [support@zeotap.com](mailto:support@zeotap.com) "message appears on the screen."

**File Name: setting-up-consent-orchestration.pdf**

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2.1 Setting Up Consent Orchestration

All the consent and marketing preference attribute should be mapped to relevant consent

and marketing preference attributes in the Zeotap catalogue to ensure visibility in Consent

Orchestration rules. For more information on Consent Orchestration, refer here.

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1.SettingUpJourneys.....

221.SettingUpJourneys

Thefollowing are thebestpractices andrecommendations for settingupworkflows within

Journeys:

Ensureaccurate mapping ofallrequired datafieldsunderthecorrectsourcefor  
creating workflows. Onlythemapped fieldswillbeaccessible forfilteringduring  
workflow creation.

Atleastonestreaming sourcemustbemapped, anditismandatory forthe  
event\_name tobepresentonthesourcemapping.

Makesuretopre-createtheCalculated Attributes neededfortheworkflows.

WhilesettingupaDestination, verifythatyou'veenteredthecorrectconnection  
detailsforthedesignated channel andaresending allthemandatory fieldsrequired  
forthatchannel.

Verifyaccurate datamapping between ZeotapCDPandtheChannel.

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**File Name: setting-up-organisation-and-user.pdf**

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Thefollowing arethebestpractices for settingupOrganisations andUserswithinZeotap

CDP:

DataResidency: AlldatawillresideintheEuropean Union(EU)regionunless the customer specifically asksfordifferent region,whichneedstobenotifiedbefore hand.

Ifallthedatamustbeunified,thenensuretoonboard themontothesame organisation.

Incaseofchildorganisations, datawillnotbeunifiedacrossthem.Thisideal when:

- oDataiskeptseparate acrosscountries orbrands.
- oConsent isspecifictoaparticular brandorsource.

UserAccessManagement: Makesuretocomplete thetreemapping ofadminand otherrolesintheclientside.

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221.SettingUpPredictive Audience

Thefollowing are thebestpractices andrecommendations for settingupPredictive Audience:

Ensurethatdatafortherelevant eventsisaddedandaccurately mapped.  
ToruntheRFMandCLVmodels, ensurethattheyouhavemapped EventName andEvent>Timestamp andEvent>eCommerce >Price,OrderValueorCart ValueinZeotapCatalogue Field.

Thecustomer shouldhaveaccesstoover10K events forthespecificeventon whichtheyintendtoinitiatemodelcreation. For moreinformation aboutPredictive Audiences, refer here.

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**File Name: setting-up-profile-api.pdf**

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221.SettingUpProfileAPI

Belowarethebest-practices thatyouneedtoadherewhilesettingupProfileAPI.  
AspertheProfileAPIusecasesdefinedintheDiscovery Phase, each usecaseor systemmusthaveaseparate APIkeytoensuretraceability.  
Youshould invoke theProfileAPIoncepersession, only.Astheresponse is

unlikely to change, even if the API is called multiple times, you can cache the response locally for subsequent use within the session. However, note that calling the API multiple times is still counted against your usage metrics.

To avoid unnecessary counts against your usage metrics, you can add a check to prevent calling the Profile API when there is no ID to lookup.

You can use a separate API token for each interface. This ensures that each interface is uniquely identified and managed separately. Using separate API tokens also enhances the security of your system by limiting access to individual interfaces when a token is compromised.

For user lookups, you can use one of the immutable IDs or primary ID that you have selected for ID resolution. This ensures that the user is identified uniquely and the lookup is consistent across the different systems.

To ensure security, we do not recommend you implement Profile API on a web interface. Instead, you can implement the API remotely using a service layer. This approach minimises the risk of unauthorised access and other security vulnerabilities that may arise when implementing the API on a web interface.

To call a specific attribute of a user, you can use the Fetch node. This allows you to retrieve only the required attribute instead of calling all user attributes on the client side.

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221.SettingUpSources

Thefollowing are thebestpractices andrecommendations thatmustbeconsidered when  
usingSources:

Forinformation onbestpractices tobefollowed whilesettingupdifferent sources,  
refer here.

Verifythesampledaprovided bythecustomer fornestedorcomplex structures.

Presently, thisdatatypeisnotsupported. Ifingestion isnecessary, thecustomer  
mustflattenthedataontheirend.

ForServertoServer aka HTTPAPIsources, thedataformatsmayneedtobe  
transformed.

Consider theEventsvsProfilesvsottherattribute typescarefully whendefining  
customfieldsbasedonthecustomer's use-caseandspecified datatype.For  
information onCatalogue fields,refer here.

ForDeltas,youmustonlysharetheupdated datatoensureoptimaluseof  
processing allowance.

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221.Validating DatabeforeOnboarding

Thefollowing arethe best practices for validating databeforeonboarding:

Allsources needtosharethesamplefilestovalidatethedatacominginwiththe  
datadiscovery sheet.

Alldatashouldbefirstuploaded intothesandbox environment andtested,before  
onboarding ontotheProduction environment. AllclientsaregivenoneSandbox  
environment.

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