Get Started with Marketing Cloud Personalization

You can configure Personalization to support customer engagement campaigns across many different digital communication channels, including Web, Email, and Mobile. It also supports campaigns through integrations with other systems such as CRM and other external data systems.

You can perform some of these tasks in the Personalization UI, while other require writing code specific to the requirements of the company and its business users.

Developer tasks refer to those tasks that require some kind of code development, while business user tasks refer to tasks carried out by users in the Personalization UI.

This documentation explains the tasks for developers.

To learn how businesses use channels and develop campaigns in the Personalization UI, see Channels and Campaigns on Salesforce Help.

Web channel campaigns and the web templates that support them require integration with the company website. This integration is achieved through the Salesforce Interactions SDK and the Sitemap, a part of the Web SDK, that recognizes, processes and sends user interactivity data from the website to Personalization. The individual or team responsible for managing scripts on the company website must deploy the Salesforce Interactions SDK to the designated company website pages. Then, a developer must validate the deployment and configure the Sitemap based on the data processing requirements provided by the business. The articles in the Web Integration section of this site provide website integration planning considerations, Salesforce Interactions SDK specifications, and Sitemap configuration requirements.

Before business users can develop web campaigns in the Personalization UI, Personalization developers must create the framework for displaying those web campaigns by developing reusable web templates.

The Campaign Development section of this site explains the web campaign development process from the developer perspective and contains the articles explaining the technical requirements for web template development.

Use the Event API to process real-time data. The Event API is a REST API that processes and responds to event data sent from the Sitemap or from external systems.

The articles in the Event API section of this site cover the purpose, capabilities and requirements for using the Event API, HTTP request and response specifications, and HTTP request and response examples for common Personalization use cases.

Personalization supports batch data ingestion and processing from external data system sources through ETL or other batch data processing technologies. The complete requirements for integrating external data systems for batch data ingestion into Personalization are documented in the About ETL Data Feeds article on Salesforce Help. See Data Ingestion in this developer site for a brief overview.

Personalization can support campaigns for display on mobile devices by using responsive HTML (HTML5) in its normal web templates feature or through integration with native iOS and Android mobile apps.

See Personalization Mobile Integrations for an introduction to the capabilities of the Personalization iOS and Android mobile app integrations and links to the separate native mobile app developer documentation websites.