Implement the project described in the pdf file

$$Project-Rules

- Only do what is explicitly written in this document when it comes down to pages, menus and features.
- Business professional css

$$Application-Type

- Web application
  - simple app with html, css and likely lots of java-script. No database needed.

$$Application-Structure

- There is a single home page that acts as host to all other pages, the user never changes URL, this is the **$Page-Area**.
- Critical to ensure that all content that is labeled as “%-Page” is always and only displayed in the **$Page-Area**

$Main-App-Page

- There are three main functional areas, **$Main-Header**, **$Left-Navigation**, **$Page-Area**
- The $Header occupies the full horizontal of the page
- The $Left-Navigation and $Page-Area are side by side under the $Header
- These three areas are always shown, **$Left-Navigation** can be collapsed so that the **$Page-Area** gets more space
- **$Main-App-Page** will never have a scroll bar, if any appears will part of other pages being rendered inside the **$Page-Area**
- Only one Page is shown at a time in the **$Page-Area** depending on the user’s selection
- Default page displayed and selected is “$Home”, which is empty state, we expect the user to click on **$Solution-Manager** after in the demo flow

$Main-Header

- covers about - 15% of the total vertical width of the **$Main-App-Page**
- The header is made from two sub components, **$Search-Bar-Area** and **$Top-Navigation-Area**

$Left-Navigation

- when expanded covers about 15% of horizontal size of **$Main-App-Page**
- Each item in the **$Left-Navigation** has an icon a head of the label
- The icon set is in gray hue
- Pick icons that correspond with the provide label
- Each items and Icon together fill the full horizontal width of the **$Left-Navigation**
- should be collapsable and expanded by default. When collapsed only show the icons from the pages listed on the left bar

$Page-Area

- this page content dynamically changes depending on the user's choices from the $Header or $Left-Navigation
- There should be very minimal border between the **$Main-Header**, **$Left-Navigation**, **$Page-Area**, the **$Page-Area** should utilize its space fully as this is where the main interaction of the experience happens

$Search-Bar-Area
- This area covers 60% of the **$Header** allocated vertical space
- This area contains three elements **$Salesforce-Icon, $Search-Bar, $Application-Icons**

$Salesforce-Icon
- A blue cloud icon that is on the left end of the **$Search-Bar-Area,** include the real salesforce logo from the web

$Search-Bar
- A search bar, only for display for now not functional
- Is centered in the **$Search-Bar-Area**

$Application-Icons
- small icons that will load different pages in the **$Page-Area**
- The $Application-Icons are right align within the **$Search-Bar-Area**

$Top-Navigation-Area
- this area covers 40% of the **$Header** allocation vertical space
- This area has three elements **$App-Picker-Icon, $App-Label, $Navigation-Menu-Elements**
- Ensure that **$App-Picker-Icon, $App-Label, $Navigation-Menu-Elements** are left aligned within **$Top-Navigation-Area**

$App-Picker-Icon
- Application picker icon (use the nine dots 3x3 Google style).
- When clicked a dropdown menu of Applications will come up.
- Use "**$Sales**", "**$Service-App**", "**$Marketing-App**", "**$Commerce-App**" and "**$Data-360-App**" (defaulted), do not display the "-App" part in the label
- If any of the other apps is selected the only change is the **$App-Label**

$App-Label
- This label changes depending on the selection from the menu that shows in **$App-Picker-Icon**

$Navigation-Menu-Elements (Tabs) for **$Data-360-App**
- **$Home** - will load **$Home-Data-360-Page**
- **$Solution-Manager** - "Solution Manager" will load the object home for the page. An object home is a tile list of all the records that are stored in the $Solution-Manager. List of Tiles available **$Solution-Manager-Tiles**

$Solution-Manager-Tiles

- **$[262] Integrate-Business-Entities-Tile**
- **$[DF] Integrate-Business-Entities-Tile**
- **$Customer-Households-Tile**

$Tile-Template

- **$Title** - title for the template
- **$Description** - short description of the solution template
- **$Extended Description** - a more detailed description of the solution template
- **$Click** - each tile when clicked will open a specific page to be loaded in the **$Page-Area**

$[262] Integrate-Business-Entities-Tile

- TItle "Integrate Business Entities from Informatica in Data 360"
- Description - Realize the full potential of the curated and enriched business entities from Informatica directly in D360. In this step by step guide, we will work though the steps required to operationalize business entities created in Informatica in D360
- On click will load **$[262] Integrate-Business-Entities-Page**

$[DF] Integrate-Business-Entities-Tile

- TItle "Integrate Business Entities from Informatica in Data 360"
- Description - Realize the full potential of the curated and enriched business entities from Informatica directly in D360. In this step by step guide, we will work though the steps required to operationalize business entities created in Informatica in D360
- On click will load **$[DF] Integrate-Business-Entities-Page**

$Customer-Households-Tile

- Title "Integrate and expand CRM Households in Data 360"
- Description - Enable Analytics, Marketing and Agentic experiences for your existing Customer Households. Extend the Household profile with engagement data from other systems though Unified Individuals and Household link Rules.
- On click will load the **$Customer-Households-Page**

$Home-Data-360-Page

- Placeholder page that shows empty

$Left-Navigation's selection

- **$Connect-Unify** - "Connect & Unify", placeholder page shows when selected with empty state
- **$Govern-Data** - "Govern Data", placeholder page shows when selected with empty state
- **$Process-Content** - "Process Content", , placeholder page shows when selected with empty state

- **$Query-Segment** - “Query & Segment”, placeholder page shows when selected with empty state
- **$Analyze-Predict** - “Analyze & Predict”, placeholder page shows when selected with empty state
- **$Act-on-Data** - “Act on Data”, placeholder page shows when selected with empty state
- **$Build-Share** - “Build & Share”, placeholder page shows when selected with empty state

$Solution-Manager-Pages-Template

- The page content displays in the **$Page-Area**
- This pages is made up of **$Header-Instructions, $Step-Summary** panel and multiple **$Step-Details-XX** panels
- The goal of these pages is to provide a guided tutorial for a user that is trying to accomplish a complex multi step task
- **$Header-Instructions** covers the top 20% of the page
- **$Step-Summary** cover another 20% the page
- There should be some space between the $Step-Summary and the $Step-Details-panels below.
- **$Step-Details-Template** panels are expected to introduce a scroll on the page so that the user can preview all of them

$[262] Integrate-Business-Entities-Page of $Solution-Manger-Pages-Template

- The step-details-p
- The page content displays in the **$Page-Area**
- **Step-Details** for **$[262] Integrate-Business-Entities-Page** are described below

$[DF] Integrate-Business-Entities-Page of $Solution-Manager-Pages-Template

- The step-details-p
- The page content displays in the **$Page-Area**
- **Step-Details** for **$[DF] Integrate-Business-Entities-Page** are described below

$Customer-Households-Page of $Solution-Manager-Pages-Template

- This is a placeholder for now, show WORK IN PROGRESS message
- The page content displays in the **$Page-Area**
- **Step-Details** for **$Customer-Households-Page** are empty for now

$Step-Summary

- Has a collapsable button, similar to the **$Left-Navigation**, except that it collapses vertically, closer to the **$Header-Instructions** so that the **$Step-Details-Template** panels can occupy a longer portion of the screen.
- Each step of this should correspond to exactly one **$Step-Details** from the selected page.

- Individual steps can be clicked to redirect the user to the specific step and open it
- Each step should have a notion of completeness that will be represented with an icon before the step's label
- The icons can be 'Not Started', 'In-Progress', 'Completed' and will dynamically updates based on the actions the user takes in the **$Step-Details** linked to the step
- Next to the list of steps there is a large placeholder 'div' for a video tutorial associated with the tile. Link to documentation.
- This component is not locked at the top position, it scrolls with the page
- Minimal vertical length should ensure that all steps can be clearly seen without scrolling within the component. If the steps are too many, consider 2-3 column layout for the steps until it becomes clear that scroll is needed

$Step-Details-Template for the individual steps. This template will be used for every 'step' of every sub-page process. The design should be solid.

Style
- **$header** - has $**title**, $**headline and $sub-steps-summary**
- By default the panel's **$main** and **$footer** are collapsed
- If Compacted should have the vertical size of the **$Top-Navigation-Area**
- Displays the $**title**, $**headline and $sub-steps-summary**, even when compacted
- Ensure that the minimal collapsed vertical width has clearly readable $**title**, $**headline and $sub-steps-summary**
- **$main** - takes 60% of the size, 20% for $header and 20% for $footer when expanded, adds a scroller inside if the content exceed the size
- $**footer** area holds the "View Documentation"-link, "Check out Tutorial"-link, and "Next Steps"-button that are part of each step unless overridden. "Next Steps" is right aligned and the "View Documentation" and "Check out Tutorial" links are left aligned within the $footer of the $Step-Details-Template
- If Expanded should have a triple the size of the **$Top-Navigation-Area** with ⅓ reserved for the title and headline, so when the user expands and collapses the experience is smooth
- Steps and checkboxes associated with the steps are left aligned
- Action buttons in $main are right aligned - these are navigation buttons to other pages that the user may need to open to deeply configure the specific step
- Separate the area into two side by side divs, keep the action buttons on the right side with the documentation and links. Keep the instructions and checkboxes on the left side
- Aim to create minimalistic design, no need for the steps to get too long or the user will be intimidated

Functionality
- **$sub-steps-summary** is a small area within the step-headline that shows the number of completed sub steps. "0 out of 3" and changes as the user completes the sub-steps
- The expanded area of the panel is referred to as $**main-body** in the panel details
- This is a list of tiny steps and instructions the user will have to perform on different parts of the application

- Each line of the list contains a **$checkbox** that the user can mark as complete, this **$checkbox** is left aligned and $instructions text also right aligned to the checkbox.
- Each step have links to additional documentation and tutorials that are right align
- **$Description** of the objective for this step
- Validation criteria that the user can perform for this step
- Steps should be mini functional areas where the user is asked to provide or do very specific actions that once performed will mark the sub-step complete
- Some steps are only manually marked
- Add a navigation button in the button left "Next Step" that will do several things - it will scroll the page so that the next step is open and top-aligned the page should ideally flow as the user fills in the step then clicks next step. The page scrolls in a way that the user can still see the header of the step, not only the step-details.

$Header-Instructions-Template for **$Solution-Manager** item

- **$Title** - show the title associated with the $Tile-Template
- **$Description** - extended description if available that is associated with the **$Tile-Template**

$Header-Instructions for **$Integrate-Business-Entities-Page on $Header-Instructions-Template**

- Description Realize the full potential of the curated and enriched business entities from Informatica directly in D360. In this step by step guide, we will work though the steps required to operationalize business entities created in Informatica in D360

Step-Details for **$[DF] Integrate-Business-Entities-Page** of type **$Step-Details-Template**
The step details appear as a panel list on the **$Integrate-Business-Entities-Page**, the user can scroll through the tasks, open them up and usually start to complete them in order. Leverage the **$Step-Details-Template** and innovate on the extra items only within the body of the step. The $**footer** and $**header** are already defined part of the template

- $Connect-to-Informatica-System-Panel - consider two column layout, one if existing connection exists and one if the user needs to add the Tenant/User/Password
    - Dropdown for "Connection Name" if one was created prior if not
    - Input form for new Connection with "Connection Name", "Tenant URL", "User-Name" and "Password" is snow for the user to full in
    - Validation Step - using the provided information in the previous steps a user can click the "Validate" button and the system will show a spinning wheel for a second and then show that successful connection is created.
    - Title: "Connect to Informatica System"
    - Headline: "Establish trusted connection between D360 and Informatica tenants"
    - Main-Body's list has only one item with description "Configure details for the Informatica tenant, so that a trusted connection between them can be provided. The important items are "User-Name" and "Password"
- $Choose Business Entity

    - Details - Select Business from the connected tenant to integrate into Data 360
    - Action: Picked populated with a list of Informatica's tenants e.g. "USA-1", "USA-2", "Europe-1"
    - Action: Picker populated with a list of Informatica's primary business entities - Customer, Organization, Product, Supplier. Expand the list to 10 with Informatica's most common domains. User can choose multiple business entities.
    - When multiple entities are selected show notification to inform the user that the relationship between the entities will also be included
    - Validation - ignore validation check for this step
    - Complete - mark complete when a User select at least one item
- $Choose Identity Resolution Type
    - Details - Choose between "Business Entity as Unified Profile (Direct Mapping)" (Informatica compute only) OR "Golden Key-Ring" (D360 is MDM Aware)
    - The customer has to choose between one of the two modes of operation to complete this panel.
    - There is only one step 1 out of 1
    - Add details to "Business Entity as Unified Profile (Direct Mapping)" - In this mode the Business Entity completely replaces the Unified Profile by taking its place. Customers must ensure that all profile data is being sent to Informatica as well. It will only appear after it has been processed through Informatica.
    - Add details for "Golden Key-Ring" - The Business Entity is the primary and most trusted record on the Key-Ring. The Unified Profile is a superset of profile data in D360 and Informatica. Enables the Business Entity into the Real Time ecosystem for personalization.
- $Review Mappings
    - Details 01: Based on selected business entities these are the data objects identified from informatica that are being synced to Data 360. Show a scrollable list of table names associated with the respected business entity once the user has selected it. The list should be 10-12 entries.
    - Notification: We've detected extra fields beyond the standard. Below is the the proposed list of modification to Salesforce's DMO to add placeholders for these values
    - Details 02: Show a list of fields 2-10 for 3-5 of the table entries from above
    - Action - Add button with label "Review Mappings & Create Fields" for it will redirect the user to different page, a button is associated with each table from the entry list
    - Completion - the step complex when the user checks the checkbox "Mappings and schema reviewed"
- $Validate Connected data
    - Details: By Now we've integrated, mapped and transformed the Business Entities to the Standard Data Model, the following previews are based on sample data to help validate correctness of mapping and field value population
    - View Individuals and Contact Points by Data Source - associate "Preview" button with this and when clicked show a redirect notification

    - View Sample of Individuals and Contact Points - associate “Preview” button with this and when clicked show a redirect notification
    - View Sample of Emails, Phones or Address - associate “Preview” button with this and when clicked show a redirect notification
- $Set up Identity Rules
    - Details: In this section we are going to the rules that govern how to link new profile data to existing business entities or form independent key-rings to be shared with Informatica-MDM. Integrity and precedence of the Business Entities IDs is always preserved.
    - Text: Based on the available mappings and data in Party Identifier and Identity Match we recommend to include the following match rules.
    - List of Match Rules that the user can elect to create
        - Fuzzy Name and Normalized Email
        - Fuzzy Name and Normalized Phone
        - Fuzzy Name and Normalized Address
        - Party Identifiers Type and Name pairs - {“Person Identifier”:”MC Subscriber Key”}, {“Person Identifier”,“3rd Party Enrichment Ids”}
        - Identity Match Rules types - {Lead to Contact}, {“MDM Connection”}
    - Text - To modify the suggested match rules or include additional rules in the Identity Ruleset configuration
        - Action: Add "Configure" button
    - Step is completed when at least one of the match rules is selected
- $Validate Identity Data
    - Details: After Identity Resolution has finished processing use the following sample data preview to inspect the data
    - “Preview Sample Profile Data”
    - “Explore the outliers”
    - “Preview Identity Process Summary” - ‘Total Source Profiles’, ‘Total Unified Profiles’, ‘Consolidation Rate’
    - “Preview Consolidation Rate by Data Source”
    - Enable Identity Rules Schedule - toggle that is defaulted to ‘Off’
- $Enable sync to Informatica
    - Details: Enable sync to Informatica for Key-Rings that do not contain a business entity. Share the source records for enrichment and quality assurance.
    - Action - Add button “Configure D360 Setup” in Informatica
    - Checkbox - mark manually as complete when done
    - Validation - remove the validation step
- $Setup Experiences
    - Substep-1: “Search Before Create” - prevent duplicate records from being created. Add action link to “View Trailhead for Setup” right aligned
    - Substep-2: “Copy field” - enrich operational records with enterprise attributes. Add action link to “View Trailhead for Setup” right aligned
    -

- Substep-3: “Related List” - showcase any information related to the primary entity. Add action link to “View Trailhead for Setup” right aligned
- Add link for documentation and tutorial to each substep

- $Fun at Tech Summit

Step-Details for **$[262] Integrate-Business-Entities-Page** of type **$Step-Details-Template** The step details appear as a panel list on the **$Integrate-Business-Entities-Page**, the user can scroll through the tasks, open them up and usually start to complete them in order. Leverage the **$Step-Details-Template** and innovate on the extra items only within the body of the step. The **$footer** and **$header** are already defined part of the template

- $Create Ingestion End-Point Details - Setup Ingestion-API end-point from D360-Setup to be able to receive the data. Note - Optionally customer can add additional fields on the Ingestion-API-Schema via D360-Setup after schema is registered. Reference Link - Navigate to D360-Setup page
- $Create Schema on D360-End-Point Details - Register the business entities with predefined schema against the Ingestion end-point. Reference Link - Navigate to Ingestion-API-Schema page
- $Create Business Entity to Normalized-Lake Business Entity Details - Install the extensibility packages from Informatica to help publish the business entity. Reference Link - Navigate to Informatica Extensibility Packages page
- $Publish Day0 Details - Publish initial data load from Informatica to D360. Maintenance - Maintain schema sync if changed from D360. Reference Link - Navigate to Informatica Publishing page
- $Publish Day1 Details - Change data capture feed is enabled and only changes to D360 are sent. Reference Link - Navigate to CDC Configuration page
- $Bring Your Own MDM (MDS/IR) Details - Ability for Customers to populate data mastered in external MDM to Unified Profile. Reference Link - Navigate to Unified Profile configuration page
- $Data-360-MDM Datakit Details - Customer installs mappings and BYO-MDM definitions from MDM-Datakit. Reference Link - Navigate to MDM-Datakit page
- $Search Before Create Details - Customer install existing Informatica component. Reference Link - Navigate to Informatica Component page
- $CRM Enrichment Details - Profile Component, Field Enrichment, Related Lists are now available for configuration. Reference Link - Navigate to CRM Configuration page
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