

None

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{
  "Project": {
    "Title": "Guided Flows - MDM in Data 360 - 30",
    "Description": "Implement the project described in the pdf
file.",
    "Rules": [
      "Only implement features explicitly written in this
document regarding pages, menus, and features.",
      "Apply a business professional CSS style."
    ],
    "Application": {
      "Type": "Web Application",
      "TechnologyStack": "HTML, CSS, JavaScript (No database
required)",
      "Structure": {
        "SinglePageApplication": true,
        "URLManagement": "User never changes URL.",
        "PageAreaHost": "$Page-Area",
        "PageContentRule": "All content labeled as '%-Page' must
be displayed exclusively in the $Page-Area.",
        "MainAppPage": {
          "LayoutAreas": ["$Main-Header", "$Left-Navigation",
"$Page-Area"],
          "HeaderLayout": "Full horizontal width.",
          "ContentLayout": "$Left-Navigation and $Page-Area
side-by-side under $Main-Header.",
          "Visibility": "All three areas are always shown.",
          "NavigationCollapse": "$Left-Navigation can be
collapsed to increase $Page-Area space.",
          "ScrollManagement": "$Main-App-Page will never have a
scroll bar; scrolling is internal to pages in $Page-Area.",
          "PageDisplay": "Only one Page is shown at a time in the
$Page-Area.",
          "DefaultPage": {
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        "Name": "$Home",
        "State": "Empty",
        "ExpectedNextAction": "User clicks on
$Solution-Manager."
    }
},
    "MainHeader": {
        "VerticalSize": "Approx. 15% of $Main-App-Page vertical
width.",
        "Components": ["$Search-Bar-Area",
"$Top-Navigation-Area"],
        "SearchBarArea": {
            "VerticalSize": "60% of $Main-Header vertical
space.",
            "Elements": ["$Salesforce-Icon", "$Search-Bar",
"$Application-Icons"],
            "SalesforceIcon": {
                "Description": "Blue cloud icon (real Salesforce
logo).",
                "Alignment": "Left end of $Search-Bar-Area."
            },
            "SearchBar": {
                "Functionality": "Display only (non-functional).",
                "Alignment": "Centered in $Search-Bar-Area."
            },
            "ApplicationIcons": {
                "Functionality": "Load different pages in
$Page-Area.",
                "Alignment": "Right align within $Search-Bar-Area."
            }
        },
        "TopNavigationArea": {
            "VerticalSize": "40% of $Main-Header vertical
space.",
            "Elements": ["$App-Picker-Icon", "$App-Label",
"$Navigation-Menu-Elements"],

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        "Alignment": "Left aligned within
$Top-Navigation-Area.",
        "AppPickerIcon": {
            "Icon": "Nine dots (3x3 Google style).",
            "Functionality": "Opens a dropdown menu of
Applications on click.",
            "Applications": [
                {"Label": "Sales"},
                {"Label": "Service"},
                {"Label": "Marketing"},
                {"Label": "Commerce"},
                {"Label": "Data 360", "IsDefault": true}
            ],
            "SelectionEffect": "Only changes the $App-Label."
        },
        "AppLabel": {
            "DynamicContent": "Changes based on
$App-Picker-Icon selection."
        },
        "NavigationMenuElements": {
            "Type": "Tabs (for $Data-360-App)",
            "Elements": [
                {"Label": "$Home", "LoadsPage":
"$Home-Data-360-Page"},
                {
                    "Label": "$Solution-Manager",
                    "LoadsPage": "Object Home (Tile list of
$Solution-Manager records)",
                    "ObjectHomeContent":
["$Integrate-Business-Entities-Tile"]
                }
            ]
        }
    },
    "LeftNavigation": {

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        "HorizontalSizeExpanded": "Approx. 15% of
$Main-App-Page horizontal size.",
        "ItemStructure": "Icon + Label, filling full horizontal
width.",
        "IconStyle": "Gray hue.",
        "IconSelection": "Icons must correspond with the
provided label.",
        "CollapseFunctionality": {
            "DefaultState": "Expanded",
            "Collapsible": true,
            "CollapsedStateView": "Only show icons for pages
listed on the left bar."
        },
        "Pages": [
            {"Name": "$Connect-Unify", "Label": "Connect &
Unify", "DefaultState": "Empty"},
            {"Name": "$Govern-Data", "Label": "Govern Data",
"DefaultState": "Empty"},
            {"Name": "$Process-Content", "Label": "Process
Content", "DefaultState": "Empty"},
            {"Name": "$Query-Segment", "Label": "Query &
Segment", "DefaultState": "Empty"},
            {"Name": "$Analyze-Predict", "Label": "Analyze &
Predict", "DefaultState": "Empty"},
            {"Name": "$Act-on-Data", "Label": "Act on Data",
"DefaultState": "Empty"},
            {"Name": "$Build-Share", "Label": "Build & Share",
"DefaultState": "Empty"}
        ],
    },
    "PageArea": {
        "DynamicContent": "Content changes based on $Header or
$Left-Navigation choices.",
        "Styling": "Minimal border with $Main-Header and
$Left-Navigation; utilize full space."
    }
}
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    }
  },
  "Pages": {
    "HomeData360Page": {
      "Name": "$Home-Data-360-Page",
      "Content": "Placeholder page, shows empty."
    },
    "SolutionManager": {
      "TileTemplate": {
        "Elements": ["$Title", "$Description", "$Extended
Description", "$Click"],
        "ClickAction": "Opens a specific page in the
$Page-Area."
      },
      "Tiles": [
        {
          "Name": "$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",
          "OnClickLoadsPage":
"$Integrate-Business-Entities-Page"
        },
        {
          "Name": "$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.",
          "OnClickLoadsPage": "$Customer-Households-Page"
        }
      ]
    }
  }
}

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    }
  ],
  "PageTemplate": {
    "Name": "$Solution-Manager-Pages-Template",
    "Layout": ["$Header-Instructions", "$Step-Summary",
"$Step-Details-XX (multiple panels)"],
    "Goal": "Provide a guided tutorial for a complex
multi-step task.",
    "HeaderInstructions": {
      "VerticalSize": "Top 20% of the page.",
      "Template": {
        "Elements": ["$Title (from $Tile-Template)",
"$Description (extended description from $Tile-Template)"]
      }
    },
    "StepSummary": {
      "VerticalSize": "Another 20% of the page (below
$Header-Instructions).",
      "Styling": "Space between $Step-Summary and
$Step-Details-panels.",
      "ScrollBehavior": "Scrolls with the page (not locked
at top).",
      "MinimumLength": "Minimal vertical length to ensure
all steps are clearly seen without scrolling within the
component. Use 2-3 column layout if needed.",
      "Functionality": {
        "Collapse": "Collapsible button (vertical collapse,
closer to $Header-Instructions).",
        "StepsList": "Each step corresponds to exactly one
$Step-Details-XX panel.",
        "StepInteraction": "Clickable to redirect and open
the specific $Step-Details-XX.",
        "CompletenessIndicator": {
          "IconPlacement": "Before the step's label.",
          "States": ["Not Started", "In-Progress",
"Completed"]],

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        "UpdateMechanism": "Dynamically updates based on
user actions in the linked $Step-Details."
    },
    "ExtraContent": "Large placeholder 'div' for a
video tutorial and a link to documentation."
}
},
"StepDetailsTemplate": {
    "Styling": "Solid, minimalistic design. Avoid overly
long steps.",
    "Structure": {
        "Header": {
            "Elements": ["$title", "$headline",
"$sub-steps-summary"],
            "CollapsedView": "Displays $title, $headline, and
$sub-steps-summary. Minimal collapsed vertical width must ensure
readability.",
            "CollapsedVerticalSize": "Vertical size of
$Top-Navigation-Area."
        },
        "Main": {
            "ReferenceName": "$main-body (when expanded)",
            "SizeExpanded": "60% of the panel's expanded
size.",
            "Scroll": "Adds a scroller if content exceeds
size.",
            "Layout": "Two side-by-side divs.",
            "LeftDiv": "Instructions and checkboxes.",
            "RightDiv": "Action buttons, documentation, and
links."
        },
        "Footer": {
            "SizeExpanded": "20% of the panel's expanded
size.",
            "Elements": [
                {"Label": "View Documentation", "Alignment":

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"Left aligned"},
    {"Label": "Check out Tutorial", "Alignment":
"Left aligned"},
    {"Label": "Next Steps-button", "Alignment":
"Right aligned", "FunctionalityOverride": "Unless overridden."}
  ]
}
},
"Functionality": {
  "DefaultCollapse": "$main and $footer are collapsed
by default.",
  "ExpandedSize": "Triple the size of the
$Top-Navigation-Area.",
  "ExpandedSizeRatio": "1/3 reserved for $header
(title and headline) for smooth expansion/collapse.",
  "SubStepsSummary": "Small area in step-headline
showing completed sub-steps (e.g., '0 out of 3').",
  "SubStepList": {
    "Content": "Tiny steps and instructions.",
    "Elements": [
      {"Name": "$checkbox", "Alignment": "Left
aligned", "Functionality": "User marks as complete."},
      {"Name": "$instructions text", "Alignment":
"Right aligned to $checkbox."},
      {"Name": "Links to documentation/tutorials",
"Alignment": "Right align."}
    ],
    "CompletionTrigger": "Actions in mini functional
areas or manual marking."
  },
  "Description": "Objective for the step.",
  "ValidationCriteria": "Criteria the user can
perform for this step.",
  "ActionButtons": {
    "Description": "Navigation buttons to other
configuration pages.",

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        "Alignment": "Right aligned in $main."
    },
    "NextStepButton": {
        "Placement": "Bottom left (in $footer).",
        "Functionality": "Scrolls the page so the next
step is open and top-aligned, keeping the step header visible."
    }
}
},
"IntegrateBusinessEntitiesPage": {
    "Name": "$Integrate-Business-Entities-Page",
    "DisplayArea": "$Page-Area",
    "HeaderInstructionsContent": {
        "Description": "Realize the full potential of the
curated and enriched business entities from Informatica directly
in D360. In this step by step guide, we will work though the
steps required to operationalize business entities created in
Informatica in D360"
    },
    "StepDetails": [
        {
            "Name": "$Connect-to-Informatica-System-Panel",
            "Title": "Connect to Informatica System",
            "Headline": "Establish trusted connection between
D360 and Informatica tenants",
            "Layout": "Two column layout suggested (existing
vs. new connection).",
            "InputFields": [
                {"Type": "Dropdown", "Label": "Connection Name",
"Condition": "If one was created prior"},
                {"Type": "Input Form", "Labels": ["Connection
Name", "Tenant URL", "User-Name", "Password"], "Condition": "If
user needs to add new connection"}
            ],
            "MainBodyList": [

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        {"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"}
    ],
    "ValidationStep": {
        "Button": "Validate",
        "Action": "Shows spinning wheel for a second,
then 'successful connection is created' message."
    }
},
{
    "Name": "$Choose Business Entity",
    "Title": "Choose Business Entity",
    "Details": "Select Business from the connected
tenant to integrate into Data 360",
    "Action": {
        "Type": "Picker",
        "Content": "List of Informatica's primary
business entities: Customer, Organization, Product, Supplier.
Expand the list to 10 with Informatica's most common domains.
User can choose multiple entities.",
        "NotificationOnMultipleSelection": "Inform the
user that the relationship between the entities will also be
included."
    },
    "Validation": "Ignore validation check for this
step.",
    "CompletionCriteria": "Mark complete when a User
selects at least one item."
},
{
    "Name": "$Choose Identity Resolution Type",
    "Title": "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)",

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    "Steps": "Only one step (1 out of 1).",
    "Options": [
      {
        "Label": "Business Entity as Unified Profile
(Direct Mapping)",
        "Details": "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."
      },
      {
        "Label": "Golden Key-Ring",
        "Details": "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."
      }
    ],
    "CompletionCriteria": "The customer has to choose
between one of the two modes of operation to complete this
panel."
  },
  {
    "Name": "$Review Mappings",
    "Title": "Review Mappings",
    "Details": [
      "Based on selected business entities these are
the data objects identified from informatica that are being
synced to Data 360. Show a scrollable list of table names
associated with the respected business entity once the user has
selected it. The list should be 10-12 entries.",
      "Show a list of fields (2-10) for 3-5 of the
table entries from above."
    ],
  },
]
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    "Notification": "We've detected extra fields beyond
the standard. Below is the the proposed list of modification to
Salesforce's DMO to add placeholders for these values",
    "Action": {
        "Type": "Button",
        "Label": "Review Mappings & Create Fields",
        "Placement": "Associated with each table from the
entry list.",
        "Functionality": "Redirect the user to a
different page."
    },
    "CompletionCriteria": "The step is complete when
the user checks the checkbox 'Mappings and schema reviewed'."
},
{
    "Name": "$Validate Connected data",
    "Title": "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",
    "ActionButtons": [
        {"Label": "View Individuals and Contact Points by
Data Source", "Functionality": "Show a redirect notification on
click."},
        {"Label": "View Sample of Individuals and Contact
Points", "Functionality": "Show a redirect notification on
click."},
        {"Label": "View Sample of Emails, Phones or
Address", "Functionality": "Show a redirect notification on
click."}
    ]
},
{
    "Name": "$Set up Identity Rules",
    "Title": "Set up Identity Rules",
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"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.",

"Recommendations": "Based on the available mappings and data in Party Identifier and Identity Match we recommend to include the following match rules.",

"MatchRulesList": [  
    "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\"}"

],

"ConfigurationLink": {  
    "Text": "To modify the suggested match rules or include additional rules in the Identity Ruleset configuration",  
    "Action": "Add 'Configure' button."

},

"CompletionCriteria": "Step is completed when at least one of the match rules is selected."

},

{

    "Name": "\$Validate Identity Data",  
    "Title": "Validate Identity Data",  
    "Details": "After Identity Resolution has finished processing use the following sample data preview to inspect the data",

    "PreviewActions": [  
        "Preview Sample Profile Data",

        "Explore the outliers",

        "Preview Identity Process Summary - 'Total Source

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Profiles', 'Total Unified Profiles', 'Consolidation Rate'",
    "Preview Consolidation Rate by Data Source"
  ],
  "Toggle": {
    "Label": "Enable Identity Rules Schedule",
    "DefaultState": "Off"
  }
},
{
  "Name": "$Enable sync to Informatica",
  "Title": "Enable sync to Informatica",
  "Details": "Enable sync to Informatica for
Key-Rings that do not contain a business entity. Share the source
records for enrichment and quality assurance.",
  "Action": {
    "Type": "Button",
    "Label": "Configure D360 Setup in Informatica"
  },
  "CompletionCriteria": "Checkbox - mark manually as
complete when done.",
  "Validation": "Remove the validation step."
},
{
  "Name": "$Setup Experiences",
  "Title": "Setup Experiences",
  "SubSteps": [
    {"Label": "Search Before Create", "Description":
"prevent duplicate records from being created.", "ActionLink":
"View Trailhead for Setup (right aligned)"},
    {"Label": "Copy field", "Description": "enrich
operational records with enterprise attributes.", "ActionLink":
"View Trailhead for Setup (right aligned)"},
    {"Label": "Related List", "Description":
"showcase any information related to the primary entity.",
"ActionLink": "View Trailhead for Setup (right aligned)"}
  ],

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        "Links": "Add link for documentation and tutorial  
to each substep."  
    },  
    {  
        "Name": "$Fun at Tech Summit",  
        "Title": "$Fun at Tech Summit"  
    }  
]  
},  
"CustomerHouseholdsPage": {  
    "Name": "$Customer-Households-Page",  
    "DisplayArea": "$Page-Area",  
    "Content": "WORK IN PROGRESS message.",  
    "StepDetails": "Empty for now."  
}  
}  
}  
}  
}
```