



# Data Cloud Certification Prep

Session 3 of 3  
Cert Prep, Tips & Tricks



# First, some logistics

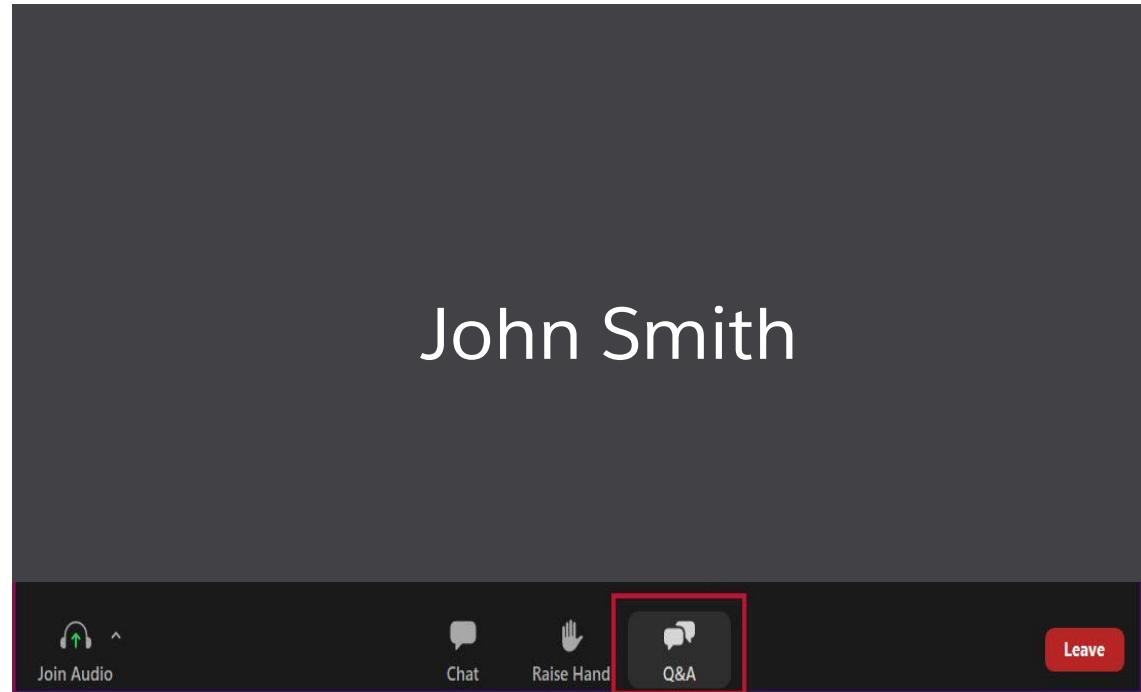
## Questions, answers and videos

### How do you ask a question?

- Please Post your question only in the Q&A section on your Zoom Window.

### How do you turn on Closed Captions?

- At the bottom of your screen, click on “closed captions”



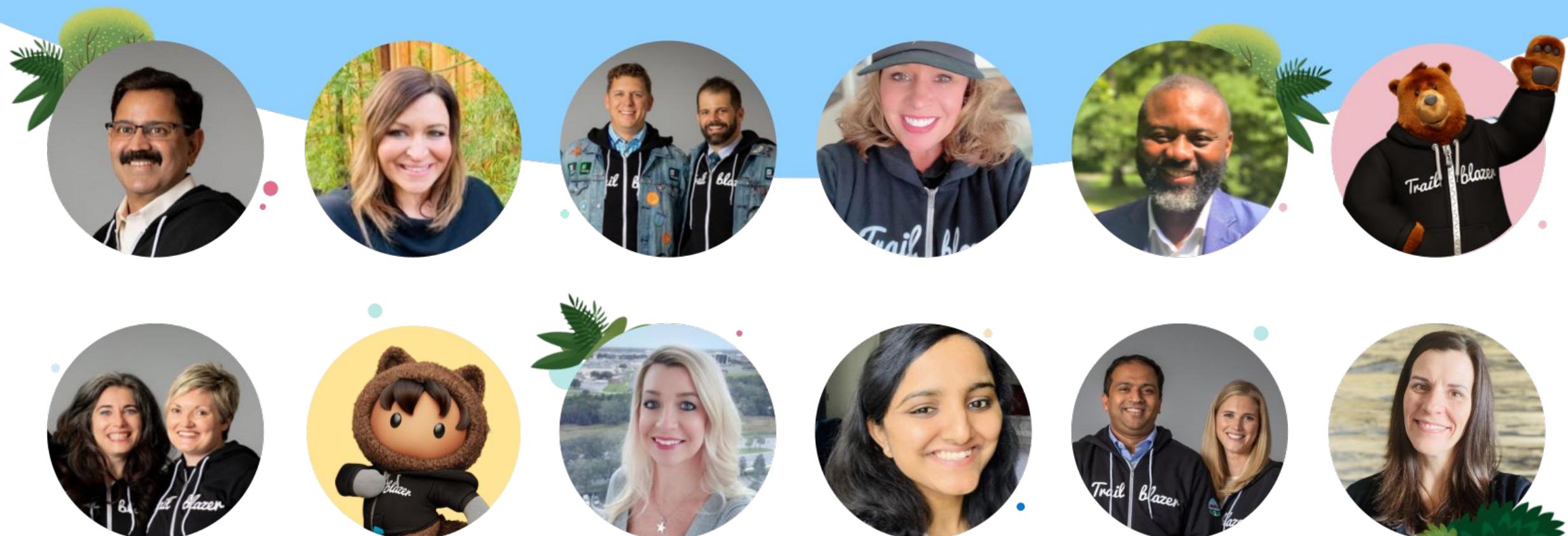
# Forward-Looking Statement



This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.



# Thank You, Partners



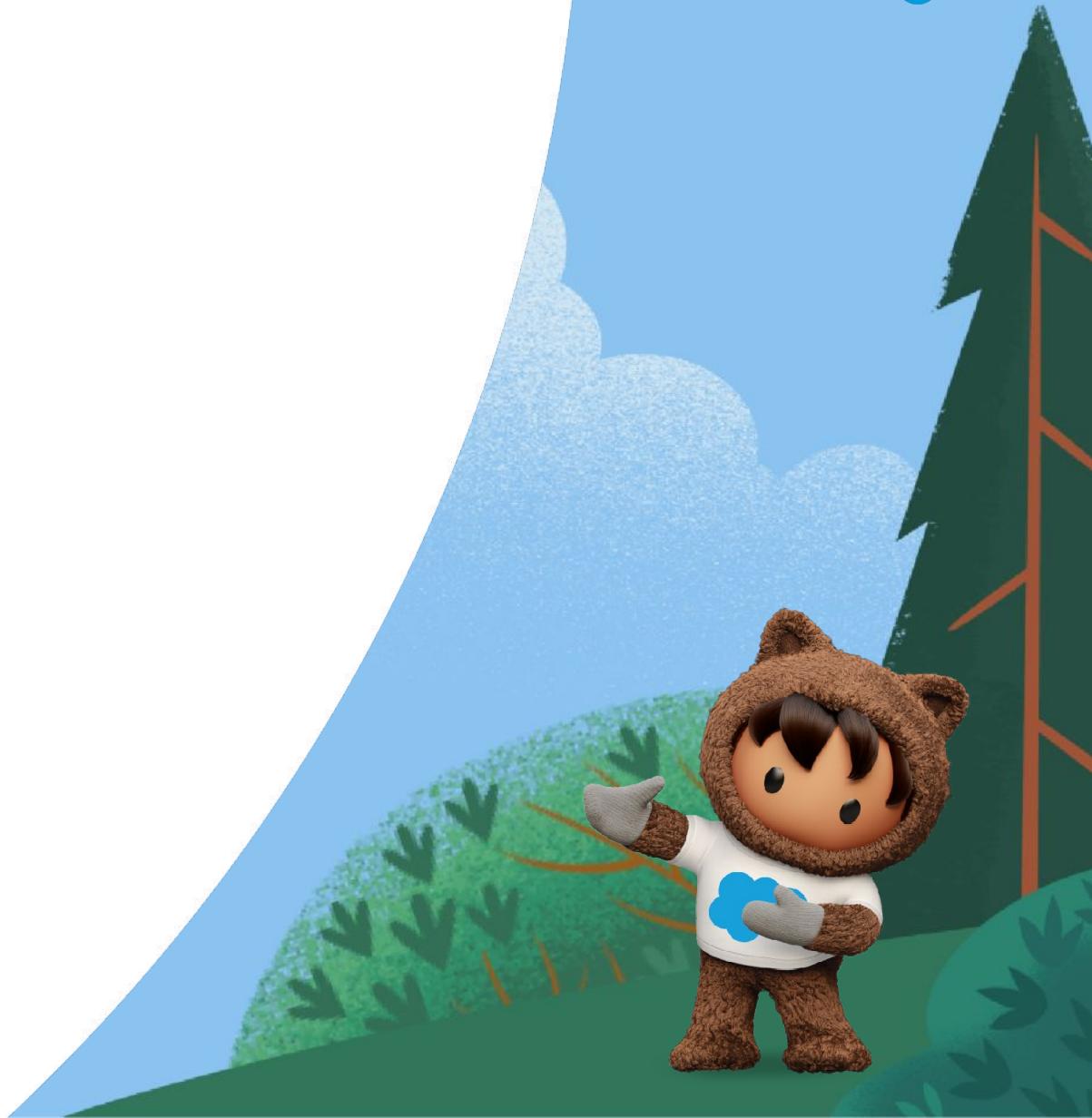
# Today's Presenters



**Vikas Roy**  
Director  
Partner Enablement Success



**Matt Wash**  
Sr Manager,  
Partner Enablement Success



# Data Cloud Certification Prep Program



## Weekly Learning Cohorts

- Prepares you for Data Cloud Consultant Certification
- Key Things you need to know to pass the Certification
- 3 sessions (6 hours)

<http://sfdc.co/dcpartnercertprep>

**Cohort Details**

- 1 week
- 3 sessions per week
- Sessions are 2 hours long
- Total time commitment: **6 hours**

**Session Topics**

Overview, Setup & Administration, Ingestion & Modeling  
Unification, Segmentation & Insights, Act on Data  
Cert Prep (focus topics), Show & Tell, Tips & Tricks

**Vouchers**

Individuals who complete the cohort and are employed at registered Partner firms may be eligible to receive a Data Cloud exam voucher, while supplies last.  
Limit one voucher per individual.\*

Cohort	Timezone Friendly	Dates	Times	Registration
#1	APAC/India	Jul 29th, Jul 31st, Aug 2nd	AEST 14:00 - 16:00 IST 9:30 AM - 11:30 AM	Closed
#2	AMER/LATAM	Aug 5th, Aug 7th, Aug 9th	EST 11:00 AM - 1:00 PM PST 8:00 AM - 10:00 AM	<a href="#">Zoom</a>
#3	EMEA	Aug 12th, Aug 14th, Aug 16th	GMT 10:00 - 12 noon IST 2:30 PM - 4:30 PM	<a href="#">Zoom</a>

# Data Cloud Cert Prep Resources

<https://sfdc.co/DCCertPrep>

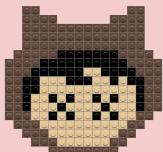
Slides - Available in the resources page

Q&A - Available in the resources page

## Recordings

- ~~These Certification Prep sessions are NOT recorded~~
- We will be sharing recordings

\*Voucher eligibility is based on Cohort attendance



Getting a “**Server Error**” when accessing this page? Try creating a free Quip account & trying again.

## Data Cloud Certification Preparation Resources

<http://sfdc.co/DCCertPrep>

This program is a series of weekly learning cohorts designed to prepare you for taking the Data Cloud Consultant Certification exam. All details on this program including dates, registration links can be found here  
<https://cloud.mail.salesforce.com/partnerdatacloud>

Cohort	Session	Session Date	Session Topics	Deck
Cohort 2	1	8/5/2024	Overview, Setup & Administration, Ingestion & Modeling	Will be provided
Cohort 2	2	8/7/2024	Unification, Segmentation & Insights, Act on Data	Will be provided
Cohort 2	3	8/9/2024	Cert Prep, Tips & Tricks	Will be provided

### Resources

- Data Cloud Partner Pocket Guide: <https://sfdc.co/datacloudpocketguide>
- Partner Readiness Guide to Data Cloud: <http://bit.ly/dcready>



# Data Cloud Cert Prep Cohort

What's Coming Up Next?



- Program Overview
- Cover first 50% of the certification curriculum
- Knowledge Check



- Cover remaining 50% of the certification curriculum
- Knowledge Check



- Getting Exam Ready
- Exam Topics
- Knowledge Check

<https://sfdc.co/dcpartnercertprep>



# Agenda

Getting Exam Ready

Exam Topics

Knowledge Check & Exam Questions

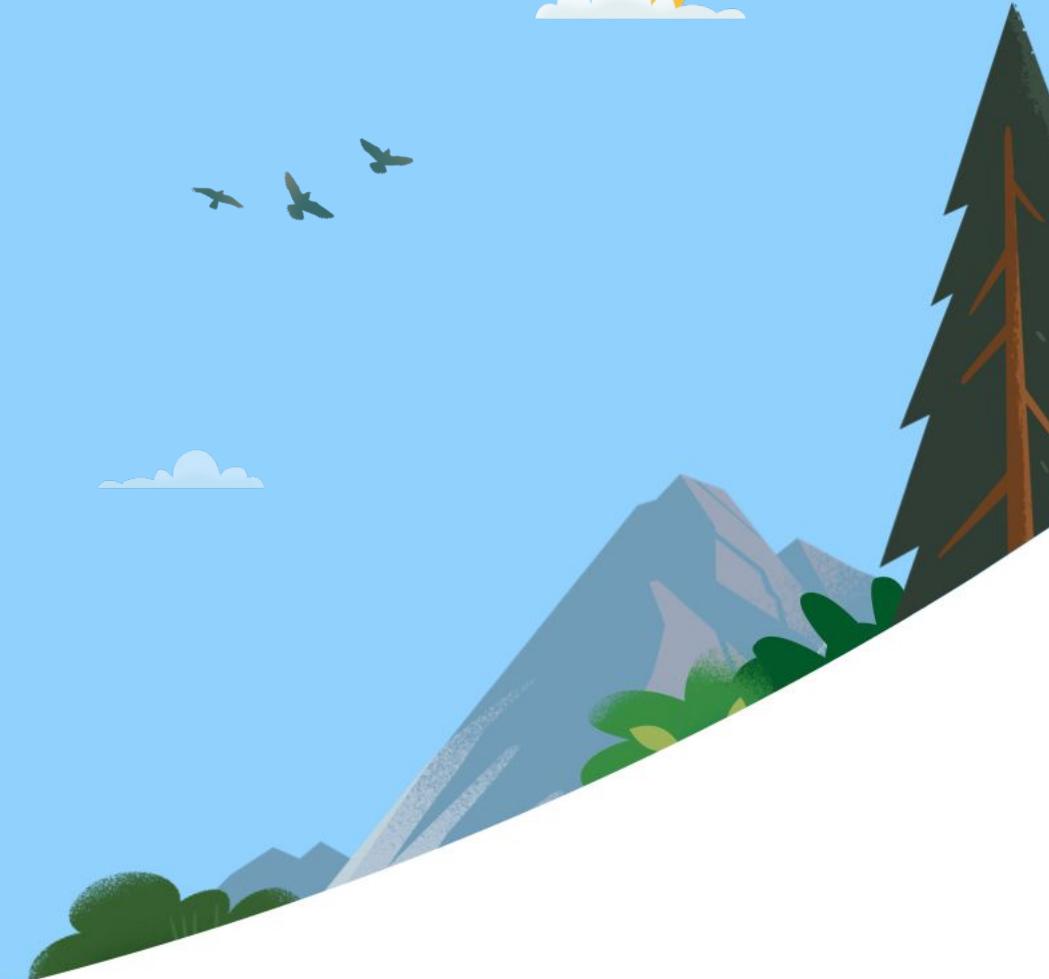
Scenario Discussion

Ongoing Learning





# Getting Exam Ready





## Salesforce Certified Data Cloud Consultant

Certification Value



### Why is Certification Important?

- Enhanced Skills and Knowledge
- Career Advancement
- Industry Recognition
- Keep up with Emerging Technology
- Client Trust & Employer Notoriety
  - Certs contribute to Partner Navigator status
- Personal Satisfaction
- Data Cloud is a foundational component of Salesforce



Partner Finder: <https://findpartners.salesforce.com/>



## Salesforce Certified Data Cloud Consultant



### Eligibility

## Who should take the Data Cloud Consultant exam?

- Anyone who wants broad, foundational knowledge of the platform, most commonly:
  - Solution Architects
  - Technical Architects
  - Developers
  - Strategists
  - Business Analysts
  - Data Scientists





# Salesforce Certified Data Cloud Consultant

Total Question

60

Allotted Time

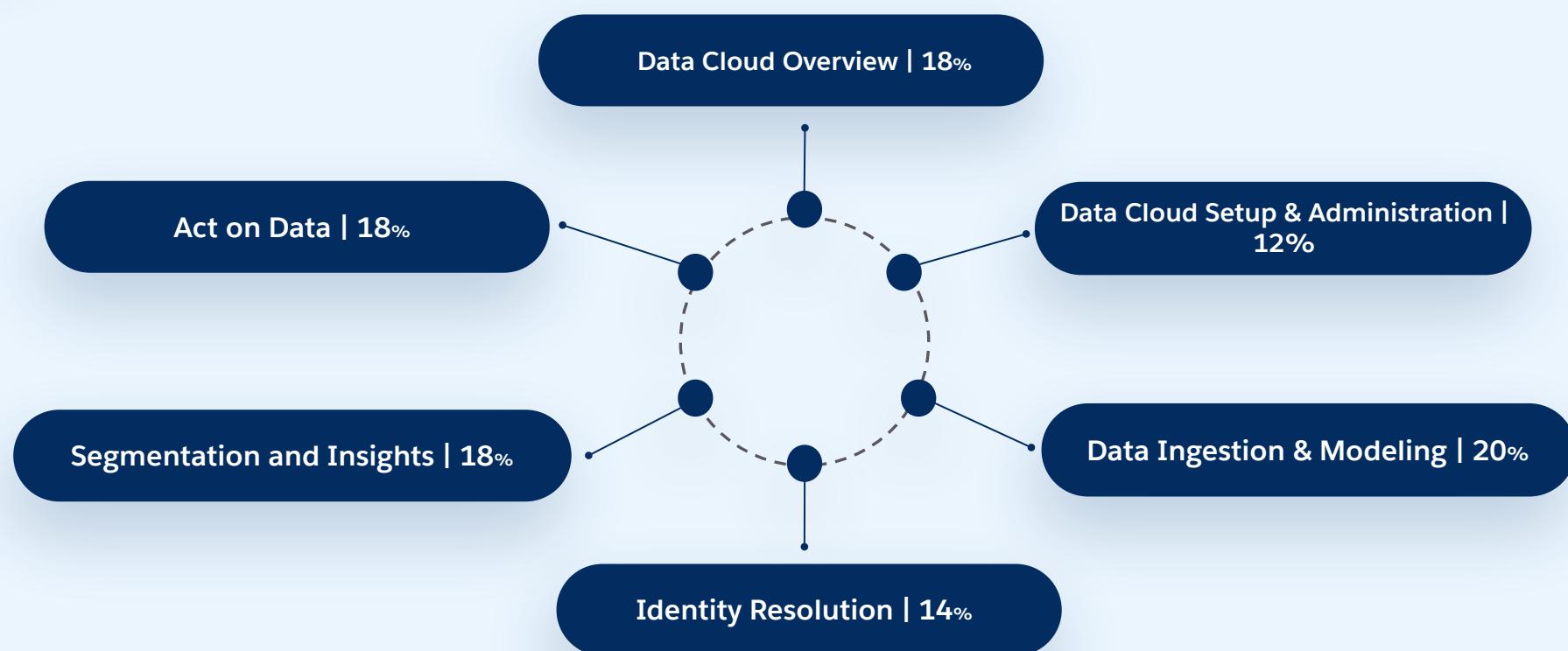
105 min

Passing Score

62 %



## Exam Outline



Get the Exam Guide: <https://sfdc.co/DCCert>





# Salesforce Certified Data Cloud Consultant

Total Question

60

Allotted Time

105 min

Passing Score

62 %



## Exam Outline



### Recall

“What does X feature do?”

FEW

### Simple Application

“What would you use in  
order to achieve X  
outcome?”

SEVERAL

### Scenario-based

“Customer has X scenario.  
What would the best  
solution to address it?”

MANY

*Test takers are strongly advised to complete the Data Cloud Partner Learning Camp Curriculum before attempting the exam*





# Salesforce Certified Data Cloud Consultant

Total Question

60

Allotted Time

105 min

Passing Score

62%



## General Tips

- Take your time
- Read every question several times
- Many questions are scenario-based
- If you're stuck, flag the question and come back
- Brush up on the [Glossary of Terms](#)
- Complete the Trailhead & Hands-On Exercises!  
*(people that complete it pass 40% more often than folks that don't)*
- Comment!



# Exam Topics





# Salesforce Certified Data Cloud Consultant

Total Question

60

Allotted Time

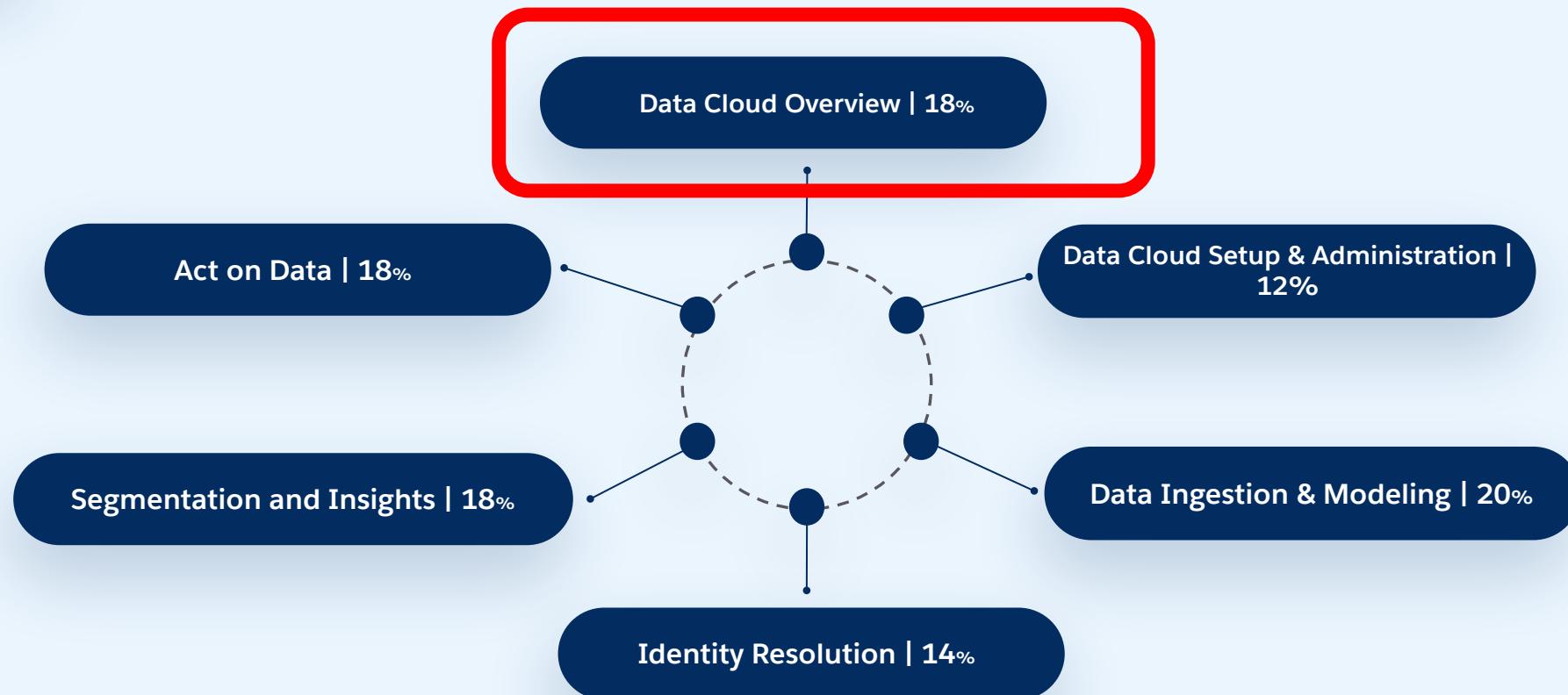
105 min

Passing Score

62 %



## Exam Outline



*Test takers are strongly advised to complete the Data Cloud Partner Learning Camp Curriculum before attempting the exam*





“



***Data Cloud Overview (18%):***  
*Data Cloud's functions,  
Key Terminology, and Business Value.*



## Study Tips

Total Question

60

Allotted Time

105 min

Passing Score

62 %



Exam Details



### Section 1: Data Cloud Overview (18%)

- Describe Data Cloud's function, key terminology, and business value.
- Identify typical use cases for Data Cloud.
- Articulate the Data Cloud lifecycle and its dependencies.
- Describe and apply the principles of data ethics: <http://sfdc.co/DCEthics>

~11 questions



# Focus Area - Solution Overview



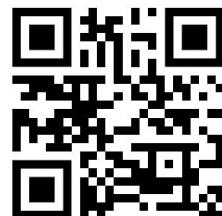
- Data Cloud and the value it brings to the customer
- Common use cases that Data cloud will solve for customers
  - Data Cloud Use Cases (Trailhead Module)
- Data Cloud Lifecycle
  - Order of Operations
  - e.g. Ingestion -> Modeling -> Identity Resolution -> Insights -> Segmentation
- Request to be deleted or Right to be forgotten is honored in
  - Data Cloud - Consent APIs
- Data Deletion considerations
- Data ethics, Privacy concern, First party data set
- Key Terminologies - Help Guide here



# Focus Area - Solution Overview



- Data Cloud and the value it brings to the customer
- Common use cases that Data cloud will solve for customers
  - Data Cloud Use Cases (Trailhead Module)
- Data Cloud Lifecycle
  - Order of Operations
  - e.g. Ingestion -> Modeling -> Identity Resolution -> Insights -> Segmentation
- Request to be deleted or Right to be forgotten is honored in
  - Data Cloud - Consent APIs
- Data Deletion considerations
- Data ethics, Privacy concern, First party data set
- Key Terminologies - Help Guide here



Study the Advanced Curriculum in PLC!  
<https://sfdc.co/DCAdvanced>



# Knowledge Check - Data Cloud Overview

## Question 1

**What is the key value driver of Data Cloud?**

- A. Connect all systems and create a Golden Record
- B. Provide a system of reference of unified profiles & related data
- C. Provide a backup and restore tool for critical data

# Knowledge Check - Data Cloud Overview

## Question 1

**What is the key value driver of Data Cloud?**

- A. Connect all systems and create a Golden Record
- B. Provide a system of reference of unified profiles & related data
- C. Provide a backup and restore tool for critical data

# Knowledge Check - Data Cloud Overview

## Question 2

Which of the following is true regarding the Consent API's Right to be forgotten?

- A. Deletion Requests are logged and suppressed from re-ingestion
- B. Deletion Requests are reprocessed every 30, 60 and 90 days
- C. Deletion Requests are submitted to all connected systems including CRM, Marketing Cloud

# Knowledge Check - Data Cloud Overview

## Question 2

Which of the following is true regarding the Consent API's Right to be forgotten?

- A. Deletion Requests are logged and suppressed from re-ingestion
- B. Deletion Requests are reprocessed every 30, 60 and 90 days
- C. Deletion Requests are submitted to all connected systems including CRM, Marketing Cloud

# Knowledge Check - Data Cloud Overview

## Question 3:

Cirrus Financial wants to create a Calculated Insight of their customer's Debt to Income ratio for use in segmentation. In what order should their steps be taken to enable this capability?

- A. Ingest Data > Map to Data Model > Create Calculated Insight > Build Segment
- B. Ingest Data > Create Calculated Insight > Map to Data Model > Build Segment
- C. Map to Data Model > Ingest Data > Build Segment > Create Calculated Insight
- D. Ping Steve on Slack > Ask Steve to Do Everything > Build Segment > Take Credit

# Knowledge Check - Data Cloud Overview

## Question 3:

Cirrus Financial wants to create a Calculated Insight of their customer's Debt to Income ratio for use in segmentation. In what order should their steps be taken to enable this capability?

- A. Ingest Data > Map to Data Model > Create Calculated Insight > Build Segment
- B. Ingest Data > Create Calculated Insight > Map to Data Model > Build Segment
- C. Map to Data Model > Ingest Data > Build Segment > Create Calculated Insight
- D. Ping Steve on Slack > Ask Steve to Do Everything > Build Segment > Take Credit

*Yes...you could technically say Answer B is also right, since you may not need to harmonize the data you're building an insight on. But between the two...Answer A is MORE right 😊*

A white circle containing two blue double quotes, indicating a quote or saying.

***Admin & Setup (12%):***  
*Permission sets, Connectors,  
Explorers and more*



## Study Tips

### Exam Details

Total Question

60

Allotted Time

105 min

Passing Score

62 %



## Section 2: Data Cloud Setup and Administration (12%)

- Apply Data Cloud permissions, permission sets, and org-wide settings.
- Describe and configure the available data stream types and data bundles.
- Identify use cases for data spaces and create data spaces based on requirements.
- Manage and administer Data Cloud using reports, dashboards, flows, packaging, and data kits.
- Diagnose and explore data using Data Explorer, Profile Explorer, and APIs.

~11 questions



# Focus Area - Setup & Administration



- Different permissions and how it restricts users in accessing Data Cloud features
- Permission set should one check if Data Cloud App is not available in Org
- Permissions to check if CRM objects are not visible while creating Data streams
- Time Zones & its impact on ingestion, scheduling & user interaction
- Difference between Home org and Non Home org
- OOTB Connectors and Topology ( 1:1, 1:N, M:N):  
Salesforce CRM, B2C Commerce, Marketing Cloud, Cloud storages etc
- Data Spaces and its use -  
Identify use cases for data spaces and create data spaces based on requirements.
- Using Reports & Dashboards, and orchestrating basic things with Flow
- Diagnose and explore data using Data Explorer, Profile Explorer, APIs & Reports



# Knowledge Check - Data Cloud Setup & Administration

## Question 4

What permission set allows users to create, manage & publish segments but NOT create activations?

- A. Data Cloud Data Aware Specialist
- B. Data Cloud for Marketing Specialist
- C. Data Cloud for Marketing Manager

# Knowledge Check - Data Cloud Setup & Administration

## Question 4

What permission set allows users to create, manage & publish segments but NOT create activations?

- A. Data Cloud Data Aware Specialist
- B. Data Cloud for Marketing Specialist
- C. Data Cloud for Marketing Manager

# Knowledge Check - Data Cloud Setup & Administration

## Question 5:

An ecommerce company wants to connect their B2C Commerce data with Data Cloud and bring in sales transactions from the previous 12 months. What option would you pick?

- A. B2C Commerce Starter Bundles
- B. Direct Sales Order object ingestion
- C. B2C Commerce Starter Bundles plus a custom extract

# Knowledge Check - Data Cloud Setup & Administration

## Question 5:

An ecommerce company wants to connect their B2C Commerce data with Data Cloud and bring in sales transactions from the previous 12 months. What option would you pick?

- A. B2C Commerce Starter Bundles
- B. Direct Sales Order object ingestion
- C. B2C Commerce Starter Bundles plus a custom extract

# Knowledge Check - Data Cloud Setup & Administration

## Question 6:

**What Data Cloud components can be packaged in a Data Kit?**

- A. Data Model Objects, Calculated Insights & Identity Resolution Rulesets
- B. Data Model Objects, Calculated Insights & Segments
- C. Data Model Objects, Activation Targets & Identity Resolution Rulesets
- D. Astro's Extra Datablazer Hoodie & Cloudy's Shampoo & Conditioner

# Knowledge Check - Data Cloud Setup & Administration

## Question 6:

**What Data Cloud components can be packaged in a Data Kit?**

- A. Data Model Objects, Calculated Insights & Identity Resolution Rulesets
- B. Data Model Objects, Calculated Insights & Segments
- C. Data Model Objects, Activation Targets & Identity Resolution Rulesets
- D. Astro's Extra Datablazer Hoodie & Cloudy's Shampoo & Conditioner

[https://developer.salesforce.com/docs/atlas.en-us.c360a\\_api.meta/c360a\\_api/c360a\\_api\\_isv\\_readiness\\_data.htm](https://developer.salesforce.com/docs/atlas.en-us.c360a_api.meta/c360a_api/c360a_api_isv_readiness_data.htm)

“

***Data Ingestion & Modeling (20%):  
Transformation, Process & Consideration,  
Mapping, Validation and Best practises***



## Study Tips

### Exam Details

Total Question

60

Allotted Time

105 min

Passing Score

62 %



### Section 3: Data Ingestion and Modeling (20%)

- Understand basic data types and object categories and how they're used
- Identify the different transformation capabilities within Data Cloud.
- Describe processes and considerations for data ingestion from different sources into Data Cloud.
- Define, map, and model data using best practices and aligning to requirements for identity resolution.
- Use available tools to inspect and validate ingested and modeled data.

~12 questions



# Focus Area - Ingestion & Modeling



Two distinct phases of Data Model Management - Data Ingestion & Data Modeling

Understanding of DSO, DLO and DMO

Creating a data stream and corresponding categories - Profile, Engagement, and Other.

Data Model entities - Contact Point Email, Contact Point Phone, Contact Point address, Individual

Data Modeling Requirements for Identity Resolution - Individual, and Contact point or Party Identification data should be mapped for unification

Difference between Transformations and Formula fields

Understand Refresh Mode differences (Full Refresh vs Upsert)



# Knowledge Check - Data Ingestion & Modeling

## Question 7:

Cirrus Financial is bringing in customer data with “Personal Phone” and “Business Phone” as separate fields on the same contact record. How can they split the records to ensure the data is properly normalized?

- A. Create a Batch or Streaming Transform to split the records for mapping
- B. Split the record on ingestion with a formula field and then map normally
- C. Map to the Personal Phone and Business Phone field on the individual

# Knowledge Check - Data Ingestion & Modeling

## Question 7:

Cirrus Financial is bringing in customer data with “Personal Phone” and “Business Phone” as separate fields on the same contact record. How can they split the records to ensure the data is properly normalized?

- A. Create a Batch or Streaming Transform to split the records for mapping
- B. Split the record on ingestion with a formula field and then map normally
- C. Map to the Personal Phone and Business Phone field on the individual

# Knowledge Check - Data Ingestion & Modeling

## Question 8:

A Client wants to ingest Workday employee records for use in segmentation.  
How should this data lake object be categorized?

- A. Profile
- B. Engagement
- C. Individual

# Knowledge Check - Data Ingestion & Modeling

## Question 8:

A Client wants to ingest Workday employee records for use in segmentation.  
How should this data lake object be categorized?

- A. **Profile**
- B. **Engagement**
- C. **Individual - Not a category**

# Knowledge Check - Data Ingestion & Modeling

## Question 9:

A customer stores phone numbers for their CRM contacts as a separate object. To what DMO should this object be mapped in order to use it in Activation & Identity Resolution?

- A. Individual
- B. Party Identification
- C. Contact Point Phone

# Knowledge Check - Data Ingestion & Modeling

## Question 9:

A customer stores phone numbers for their CRM contacts as a separate object. To what DMO should this object be mapped in order to use it in Activation & Identity Resolution?

- A. Individual
- B. Party Identification - This might be tempting, but cannot be used in activation
- C. Contact Point Phone - This can be used in BOTH activation & IR

# Knowledge Check - Data Ingestion & Modeling

## Question 10:

**What objects can NOT be viewed in the Data Explorer?**

- A. Data Lake Objects
- B. Calculated Insights
- C. Streaming Insights
- D. Spooky Ghost Objects

# Knowledge Check - Data Ingestion & Modeling

## Question 10:

What objects can NOT be viewed in the Data Explorer?

- A. Data Lake Objects
- B. Calculated Insights
- C. Streaming Insights
- D. Spooky Ghost Objects 

“



## *Identity Resolution (14%): Rulesets, Reconciliation and Use Cases*



## Study Tips

Total Question

60

Allotted Time

105 min

Passing Score

62 %



### Exam Details

#### Section 4: Identity Resolution (14%)

- Describe matching and how its rulesets are applied.
- Define reconciliation and how its rulesets are applied.
- Describe the results of identify resolution and use cases.

~9 questions



# Focus Area - Identity Resolution



- Data Modelling [Requirements](#) for Identity requirement:
  - Ensure Individual, account and contact point data is ready for unification
- Objects that gets created as a result of identity resolution:
  - Unified Contact Points, Unified link and Unified Individual
- If a customer wants to unify records on external Id ( Eg: Loyalty ID ) which object will be used for unification? Its Party Identification
- Importance of reconciliation rules in Identity resolution
  - Last updated, Most frequent, Source Priority
- Interpreting consolidation rate after Identity resolution rules set execution is complete
  - How to inspect the results of Identity resolution:  
Profile explorer, Data explorer, Reports, Query API
- Understanding of key terms:  
Fuzzy name match , Normalised email , Exact match, Ignore empty values



# Knowledge Check - Identity Resolution

## Question 11:

A bank is using identity resolution and wants to unify Profiles using the Individual's Bank Account ID. What object can be used to unify on this attribute?

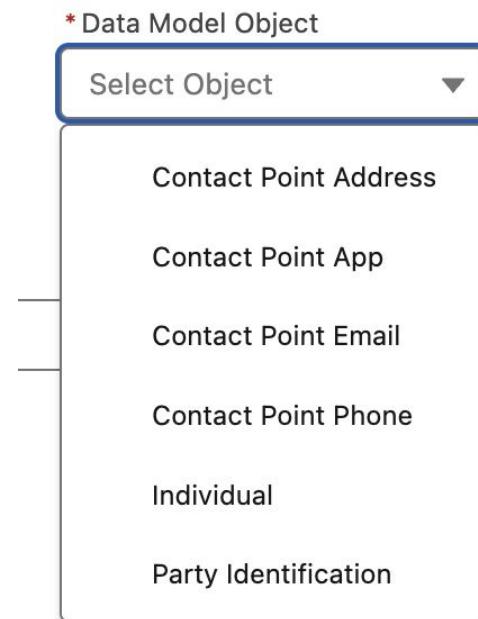
- A. Party Identification
- B. Account
- C. Individual

# Knowledge Check - Identity Resolution

## Question 11:

A bank is using identity resolution and wants to unify Profiles using the Individual's Bank Account ID. What object can be used to unify on this attribute?

- A. Party Identification
- B. Account - Not available!
- C. Individual



# Knowledge Check - Identity Resolution

## Question 12:

**What rules does Identity Resolution use to select attributes for the Unified Profile?**

- A. Matching
- B. Reconciliation
- C. Unification

# Knowledge Check - Identity Resolution

## Question 12:

**What rules does Identity Resolution use to select attributes for the Unified Profile?**

- A. Matching
- B. Reconciliation
- C. Unification

# Knowledge Check - Identity Resolution

## Question 13:

A consultant has recently reviewed their identity resolution and has noticed that the consolidation rate has suddenly declined. What could have caused this?

- A. New matching rules were added to the identity resolution ruleset
- B. The organization has removed duplicates from their source systems
- C. A new data source was added that largely overlaps the existing profiles
- D. Somebody's been touching my stuff!

# Knowledge Check - Identity Resolution

## Question 13:

A consultant has recently reviewed their identity resolution and has noticed that the consolidation rate has suddenly declined. What could have caused this?

- A. New matching rules were added to the identity resolution ruleset
- B. The organization has removed duplicates from their source systems
- C. A new data source was added that largely overlaps the existing profiles
- D. Somebody's been touching my stuff!

A blue icon consisting of two nested double quotes, indicating a quote or saying.

## *Segmentation & Insights (18%): Configuration, Key Terminologies & Use Cases*



## Study Tips

Exam Details

Total Question

60

Allotted Time

105 min

Passing Score

62%



### Section 5: Segmentation and Insights (18%)

- Define basic concepts of segmentation and use cases.
- Identify scenarios for analyzing segment membership.
- Configure, refine, and maintain segments within Data Cloud.
- Identify and differentiate between calculated and streaming insights.

~11 questions



# Focus Area - Insights



Scenario based questions & Sequence of execution based answers

- RAV wants to calculate LTV of a customer with breakdown of revenue by source. How can this be addressed in Data Cloud? - Metrics on Metrics
- Understand the sequence of Joins to achieve the use cases  
Eg: Unified Individual > Unified Individual Link > Sales Order
- If RAV wants to ingest data into Data Cloud daily and make it readily available for segment, what would be the sequence of execution?  
Refresh Data Stream > Identity resolution > Calculated Insights
- How to differentiate between Calculated and Streaming Insights
- Which is the best suited Insight generation method for ingesting Data from Ingestion API or Mobile SDKs ? - Streaming Insight
- Minimum requirement to create Calculated Insights? At least one dimension & one measure
- Consideration while editing existing Calculated Insights - Cannot remove existing measures, cannot add or remove dimension , Can only add new measures



# Focus Area - Segmentation



- Segment Management: Edit, Copy, delete , Inactive segments
- Segment Attributes: Standard fields from Sales, Service, Marketing etc or Calculated insights such as Life time value, Propensity score etc
- Importance of Segment On - Defines the target object used to build the segment.  
Only Profile type objects can be used as Segment On (Unified Individual or Individual )
- Segment Membership DMO:  
Published segment is created or updated upon publishing a Segment
- Requirement for CI to appear in Segmentation Canvas
  - CI must contain a dimension including Individual or Unified individual
  - Primary key of the segment should be a dimension in CI



# Focus Area - Segmentation (Cont...)



- Segmentation or insight derived based on **time** should be on a Data stream with Engagement category
- Different time based attributes eg: Is this year, Is Anniversary Of, is between etc

## Best Practices:

- Use the unified individual as your segment target to take advantage of identity resolution
- Use the unified attributes for segmentation to take advantage of profile merging and reconciliation rules
- Use identity resolution and segmenting on the unified individual, which is recommended if you have data from multiple data sources
- Segment on unified individual instead of individual to prevent duplicate or skipped entities in your count



# Knowledge Check - Segmentation & Insights

## Question 14:

A client wants to automatically create a support case when a customer visits the troubleshooting page twice within the last 30 minutes. What capability within Data Cloud would be best suited?

- A. Calculated Insights
- B. Rapid Segment Publish
- C. Streaming Insights

# Knowledge Check - Segmentation & Insights

## Question 14:

A client wants to automatically create a support case when a customer visits the troubleshooting page twice within the last 30 minutes. What capability within Data Cloud would be best suited?

- A. Calculated Insights
- B. Rapid Segment Publish
- C. Streaming Insights

# Knowledge Check - Segmentation & Insights

## Question 15:

**What segment operator is best suited for a Birthday Campaign that is evaluated daily?**

- A. Is Anniversary Of
- B. Is Between
- C. Is Today

# Knowledge Check - Segmentation & Insights

## Question 15:

**What segment operator is best suited for a Birthday Campaign that is evaluated daily?**

- A. Is Anniversary Of
- B. Is Between
- C. Is Today

# Knowledge Check - Segmentation & Insights



## Question 16:

A user updates an existing Calculated Insight and the syntax is correct but they are unable to save it. What could be a possible cause?

- A. It's currently in use by an activation
- B. The modifications have included a new dimension
- C. The insight does not include a Profile dimension
- D. They forgot to say “please”

# Knowledge Check - Segmentation & Insights



## Question 16:

A user updates an existing Calculated Insight and the syntax is correct but they are unable to save it. What could be a possible cause?

- A. It's currently in use by an activation
- B. The modifications have included a new dimension
- C. The insight does not include a Profile dimension
- D. They forgot to say “please”

*Dimensions cannot be added to a CI once created,  
however new metrics can be added.*

[https://help.salesforce.com/s/articleView?id=sf.c360\\_a\\_limits\\_and\\_guidelines\\_for\\_editing\\_a\\_calculated\\_insight.htm&type=5](https://help.salesforce.com/s/articleView?id=sf.c360_a_limits_and_guidelines_for_editing_a_calculated_insight.htm&type=5)



## Study Tips

Total Question

60

Allotted Time

105 min

Passing Score

62 %



Exam Details

### Section 6: Act on Data (18%)

- Define activations and their basic use cases.
- Use attributes and related attributes.
- Identify and analyze timing dependencies affecting the Data Cloud lifecycle.
- Troubleshoot common problems with activations including accepted/rejected counts, errors, and not seeing related attributes.
- Use data actions and identify their requirements and intended use cases.

~11 questions



“

***Act On Data ( 18%):***  
*Activations, Attributes & Related Attributes,*  
*Data Actions, Common Errors*



# Focus Area - Act on Data



- Activation is the process that materializes and publishes a segment to activation platforms.
- An activation target is used to store authentication and authorization information for a given activation platform.
- You can publish your segments, include contact points, and additional attributes to the activation targets.
- Two refresh types: Full or Incremental
- Activation Target is auto configured for MC Personalization and B2C Commerce
- Flows can be used to trigger change data event on source data to refresh Calculated Insights and Segments before activation
- Dimensions can be included as attribute data while activating the segment which uses Calculated insight



# Focus Area - Act on Data



Sample Scenarios:

- If RAV is activating a segment derived from Calculated Insight ( Eg RFM score), what are the two actions required while configuring activation? - Choose Segment and Selecting contact points
- What could be the probable reason for count mismatch between activated count and segment count while activating on Marketing Cloud? - Related contact point is missing for individual
- How to modify attribute names to match the naming convention in Cloud Storage?  
- Update the attribute name in data stream configuration



# Knowledge Check - Act on Data



## Question 17:

**Which of these is NOT a valid Activation Target for Activation of Data Cloud Segments?**

- A. Marketing Cloud Personalization
- B. Salesforce CRM
- C. B2C Commerce

# Knowledge Check - Act on Data



## Question 17:

Which of these is NOT a valid Activation Target for Activation of Data Cloud Segments?

- A. Marketing Cloud Personalization
- B. Salesforce CRM
- C. B2C Commerce

# Knowledge Check - Act on Data



## Question 18:

What information is provided in a .json file when activating to Amazon S3?

- A. Metadata regarding the segment definition & field schema
- B. The decryption key that will be used by S3 for reading the file
- C. Audit Log showing the user who activated the segment
- D. A fantastic recipe for an authentic and aromatic dal makhani

# Knowledge Check - Act on Data



## Question 18:

What information is provided in a .json file when activating to Amazon S3?

- A. Metadata regarding the segment definition & field schema
- B. The decryption key that will be used by S3 for reading the file
- C. Audit Log showing the user who activated the segment
- D. A fantastic recipe for an authentic and aromatic dal makhani

# Knowledge Check - Act on Data

## Question 19:

Nationwide Grocery uses calculated insights to find lifetime value per store location for its Platinum customers. In the Insight, “Lifetime Value” is a metric, “Store Location” is a dimension, “Platinum” is a filter. What can be included as an attribute in activation

- A. “Lifetime Value” (Metric)
- B. “Store Location” (Dimension)
- C. Both “Lifetime Value” (Metric) and “Store Location” (Dimension)

# Knowledge Check - Act on Data

## Question 19:

Nationwide Grocery uses calculated insights to find lifetime value per store location for its Platinum customers. In the Insight, “Lifetime Value” is a metric, “Store Location” is a dimension, “Platinum” is a filter. What can be included as an attribute in activation

- A. “Lifetime Value” (Metric)
- B. “Store Location” (Dimension)
- C. Both “Lifetime Value” (Metric) and “Store Location” (Dimension)

# Knowledge Check - Act on Data



## Question 20:

A university wants to create a case in CRM when a student fails to attend class for 5 days in a row. What pairing of capabilities would best achieve outcome?

- A. Streaming Insights & Data Actions
- B. Calculated Insights & Data Actions
- C. Segmentation & Activation
- D. Call their mother & block Tik Tok

# Knowledge Check - Act on Data



## Question 20:

A university wants to create a case in CRM when a student fails to attend class for 5 days in a row. What pairing of capabilities would best achieve outcome?

- A. Streaming Insights & Data Actions
- B. Calculated Insights & Data Actions
- C. Segmentation & Activation
- D. Call their mother & block Tik Tok

# Scenarios





# Scenario 1: Monitoring & Notification

The team that is working on Customer Acquisition at a retail company wants to be notified whenever new data is ingested into Salesforce Data Cloud so they can take timely actions based on the latest customer information.

*Question:*

*What are the best practices for setting up such a notification system to ensure that the Acquisition team receives accurate and timely updates?*

As a Data Cloud Consultant, how would you set this up?

# Solution



- Salesforce Flows can be configured to alert the Calculated Insights about new incoming data by triggering a Flow based on the completion of data streams, identity resolutions, segment publish or calculated insights.
- Flow can include actions to log information to email, Slack, or an outbound message

## Scenario 2: Consent



A multinational corporation has implemented Salesforce Data Cloud to manage customer data across various regions. The company must comply with global privacy regulations, including the GDPR, which mandates the right to be forgotten. They have integrated Salesforce's Consent API to manage customer consents and data handling preferences effectively.

*Q1. How does the Consent API help the company ensure compliance with the right to be forgotten?*

*Q2. What considerations must the company consider when implementing processes to erase personal data upon request?*

# Solution



1. You can submit Data Deletion requests of individual data profiles in Data Cloud. All requests must be submitted using the Consent API.
  - a. A Data Deletion request deletes the specified individual record from the Individual DMO and the related DMOs
2. Data Deletion requests are reprocessed at 30, 60, and 90 days to ensure a full deletion. You must submit any data deletion requests in all connected systems and Salesforce clouds.

# Scenario 3: Data Ingestion



A financial services firm is looking to optimize its revenue tracking by refining its data model subject area for opportunities within Salesforce Data Cloud. They require a comprehensive data model that accurately reflects revenue opportunities and aligns with their business processes.

They also want to streamline the ingestion of CRM and Marketing Cloud data by seeking to use the same Data Stream object to create multiple Data Lake Objects for various analytical purposes.

*Q1. Which data model subject area would you use?*

*Q2. What is the process for using a single Data Stream object to create multiple Data Lake Objects, and what are the considerations to keep in mind?*

# Solution



## 1. Sales Order Data Object

The Customer 360 Data Model sales order subject defines the future revenue or quantity for an opportunity by product family and rolls it up by territory, management (role), or hierarchy.

The sales data model includes the individual, account, sales order, and opportunity data model objects.

## 2. Use Streaming Transforms or Batch Transforms

A single Data Stream object can be used to create multiple Data Lake Objects by performing additional transformations on the initial DLO created from the data stream.

The data stream will first ingest the data and create an initial DLO. Then, additional Streaming or Bulk Transforms can be applied to that initial DLO to perform further transformations and generate additional DLOs from the source data.



# Data Cloud Readiness

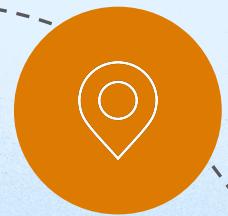
Ongoing Learning



# Getting Started With Data Cloud



## Partner Readiness



### Cert Prep Cohort

Learn Data Cloud in 1 Week  
[Sign up here](#)

### Partner Pocket Guide

Sales, Positioning, & Implementation resources  
[Getting Started](#)



## Product Readiness

Recommend [Learning Journey:](#)

Step 1: [Unlock your Data with Data Cloud Trailmix](#)

Step 2: [Data Cloud: Practical Experience Course](#) *Hands-on exercises* and access to 30 day org. (*exclusively for Partners*)

Step 3: [Salesforce Certified Data Cloud Consultant Certification](#) (*Exam Guide*)

TH Option: 3-day instructor led course through Trailhead Academy. [Discover Salesforce Data Cloud Fundamentals](#) (\$)



## Implementation Readiness (Deepening Expertise)

Step 1: [Implementation Readiness Camp](#) (*Virtual*) - 4 hour session to get prepared for Implementations

Step 2: [Advanced Data Cloud Curriculum](#) (*exclusively for Partners*)

Topics covered: Discovery and Use Cases, Implementation Considerations, Planning and Estimation

Step 3: Review the [Data Cloud Camps](#) and Workshops offered & [sign up](#)

Step 4: Review the Partner [Implementation Toolkit](#) & [Solution Kits](#) for advanced enablement assets. Assets include Blueprint Templates, Data Workbooks, Hands on Labs, Best Practice Guidance among others



## Ongoing Support

Step 1: Join the [Slack channel](#) or [Partner Community](#) for all Enablement questions, hands-on troubleshooting and announcements

Step 2: Sign-up for weekly office hours for live support from experts [AMER/EMEA](#); [APAC/India](#)

Step 3: [Video Hub](#) highlighting webinars, release deep dives and demos

<https://sfdc.co/datacloudpocketguide>

# Data Cloud Pocket Guide

Single source of truth for useful content and tools to help you successfully sell and implement Data Cloud. Find answers to FAQs, and quick links to key partner enablement resources for a deeper dive.



## Salesforce Data Cloud | Partner Pocket Guide

Welcome to the Data Cloud Pocket Guide!

**NOTE:** As of February 14, 2023, Customer Data Platform is now called Salesforce Data Cloud. During this transition, you may see references to Customer Data Platform, along with names: Genie, Customer Data Cloud, Customer 360 Audiences, and Salesforce CDP. We wish we could magically update the name everywhere, but you can expect to see the previous name in a few places as we evolve.

Join us during [Salesforce Days](#) to learn more about Data Cloud and how to get started on your learning journey. Registration Information can be found [here](#). We have 3 sessions exclusively focused on Data Cloud.

- Session 1: Data Cloud - Product Overview (May 9th)
- Session 2: Data Cloud - Deep Dive (May 10th)
- Session 3: Data Cloud - Get Credentialed & Next Steps (May 11th)

**Purpose:** This Partner Pocket Guide is your one stop shop for all your content and tools to help you successfully sell and implement Data Cloud. Review this document to understand the purpose and positioning of Data Cloud, what innovation is being delivered to address customer needs, answers to FAQs, and quick links to key partner enablement resources for a deeper dive.

We will be regularly updating this guide so be sure to check back in the Table of Contents below to find out what's new for Data Cloud!

### TABLE OF CONTENTS

- [Introduction to Data Cloud](#)
- [Sales Positioning Message](#)
- [Key Capabilities & Value](#)
- [Answers to Frequently Asked Questions](#)
- [Additional Data Cloud Resources](#)

# Data Cloud Learning Journey



Learning Time ~ 24 hrs

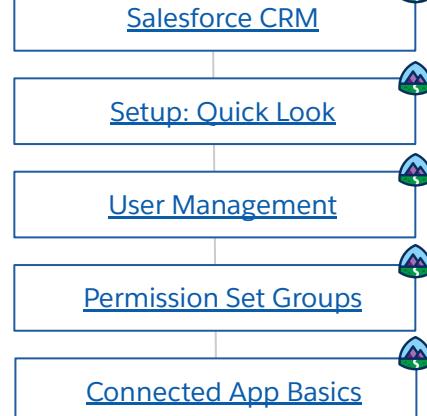


[Data Cloud Pocket Guide](#)

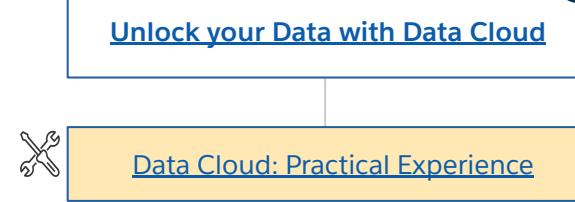
START  
HERE



## [Get Started with Salesforce CRM](#)

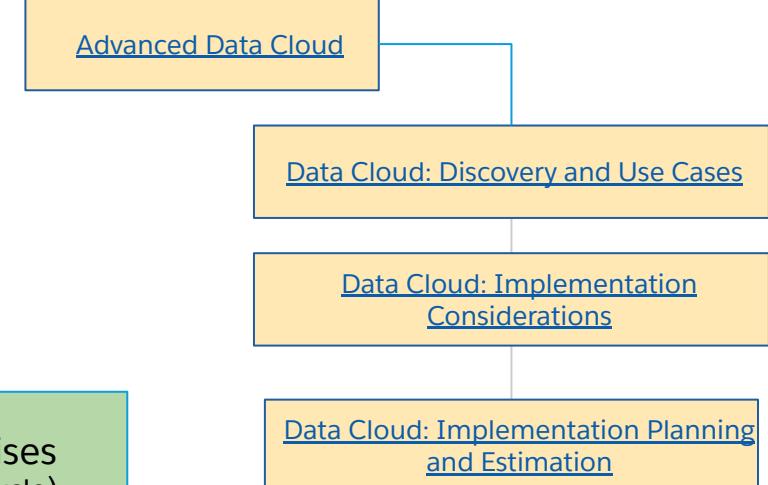


## Begin Your Data Cloud Learning Journey



15 hands-on exercises  
(Entire Data Cloud Lifecycle)

## Advance Your Data Cloud Learning Journey



LEGEND

Learning Content

Business/Non-Technical  
Product/Technical

Learning Tracks



Available

Blue Text

Partner Only

Yellow Box

Badge /  
Credential



Hands-On



# Recommended Learning Path

Spread your learning including hands on exercises over 4 weeks (~6 hrs/week)



Learning Journey Details  
[sfdc.co/DCCurriculum](https://sfdc.co/DCCurriculum)  
(Approx Time: ~24 hours)



## Week 1



### Unlock your Data with Data Cloud Trailmix

Follow & Start the '**Unlock your Data with Data Cloud**' Trailmix

## Week 2



### Finish the **Unlock your Data with Data Cloud** Trailmix



### Enroll in the **Data Cloud Practical Experience** Curriculum (PLC) Course

Finish the following Activities

1. Setup
2. Prepare
3. Data Ingestion



Sign up for a Data Cloud Trial Org



Sign up for a Free AWS Account

## Week 3



### Finish the following **Practical Experience Course** Activities

4. Batch Transforms
5. Data Modeling
6. Identity Resolution
7. Visual Insights
8. Calculated Insights (SQL)
9. Streaming Insights
10. CI via Package



### Finish the following **Practical Experience Course** Activities

11. Segmentation
12. Activation
13. Packaging
14. Error Notifications
15. Reports/Dashboards



Sign up and take the exam



# Data Cloud & AI Partner Camps

Details & Interest Form: [sfdc.co/DCCamps](https://sfdc.co/DCCamps)

## Developer Camp

Hands-on workshop focused on different development patterns to build on top of Data Cloud

**Role Persona:** Solution Developer, Data Cloud Developer, Technical Architect

### Objectives

- Integrate Data Cloud across the Salesforce C360, especially CRM
- Ingest Streaming Data leveraging the Data Cloud Web
- Create a Data Action with Platform Events (along with Flow and Apex) to integrate across Orgs
- See how you can use Flow to manage & Orchestrate Data Cloud
- Learn about Multi-Org considerations and best practices

## Architecture Camp

Workshop focused on best practices and considerations around Data Cloud Architecture and Implementation

**Role Persona:** Solution Architect, Solution Consultant, Data Consultant, Practice Lead, Solution Lead

### Objectives

- Architectural considerations and best practices across the entire Data lifecycle
- Prepare for implementation with key considerations and things to keep in mind when integrating Data Cloud across the Salesforce Customer 360
- Learn techniques to lead usage and adoption of Data Cloud
- Apply guidance and options to solve some frequently encountered scenarios in your implementations

## Implementation Camp

Workshop to Ideate and create an actionable framework for implementation of Data Cloud “first” use case, that enables “land & expand” approach and drives adoption of the platform

**Role Persona:** Solution Architect, Solution Consultant, Business Consultant, Data Consultant, Practice Lead, Data Strategist

### Objectives

- Implementation readiness - adoption of Data Cloud from inception to implementation
- Architecture considerations & best practices
- Experience with solution design of the advanced features of Data Cloud
- Design, solution and present 2 use cases through creation to solution walkthrough

# Collaboration Channels

Engage with Salesforce to answer questions & get advice



## Partner Slack

- Available to partners engaging in Data Cloud learning & supporting implementations
- Announcements of new Data Cloud features & partner resources
- Searchable repository of common questions & answers
- Ask questions to the Partner Delivery Success Team & the broader community



## Partner Community Group

- Available to all Partner Community members
- Announcements of new Data Cloud features & partner resources
- Searchable file repository of enablement assets
- Ask questions to the Partner Delivery Success Team & the broader community

# Office Hours (Implementation Support)



Get face-to-face delivery support

- Meetings via Google Meet
- Every Wednesday, 10am ET (AMER/EMEA) or 3pm AEST (APAC/INDIA)
- Submit your questions before each call (preferred way)
- Help with troubleshooting
- Get advice on best practices
- Great for more complex issues that require discussion

<https://sfdc.co/DataCloudOfficeHoursSignup>



# Implementation Toolkit

Implementation Toolkit  
[sfdc.co/DCImpToolkit](https://sfdc.co/DCImpToolkit)



Toolkit includes resources & assets you can use in your implementations

- Use Case Deck
- Implementation Guidance
- Discovery Questions
- Data Workbook
- Blueprint Template
- Project Plan
- Estimation Calculator
- and more...



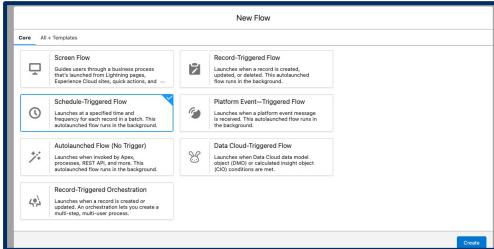
# Solution Kits

Find all Solution Kits here  
<https://sfdc.co/DCSolutionKits>



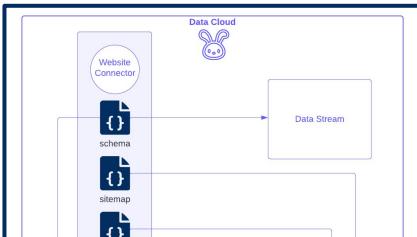
## Flow

Scheduling Identity Resolution



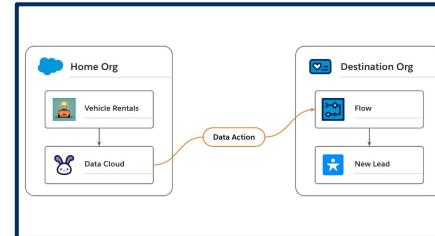
## Website Connector

Salesforce Interactions Quick Start



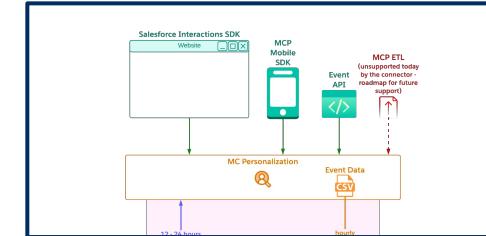
## Multiple Orgs

Cross-Org Interactivity



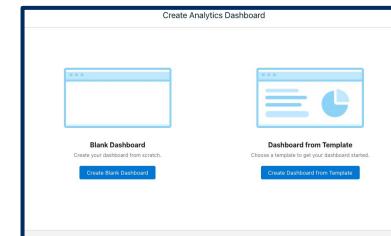
## MCP Connector

Configuration and features



## Segment Membership Dashboard

Metadata Framework with Analytics



## DBeaver

Setup plus query examples

```
SELECT '1' as "Order", 'Individual' as "Object", COUNT(*) AS "Count" FROM sso_Individual_dml
UNION
SELECT '2', 'Unified Link Individual', COUNT(*) FROM IndividualIdentityLink_dml
UNION
SELECT '3', 'Unified Individual', COUNT(*) FROM UnifiedIndividual_dml
UNION
SELECT '4', 'Party Identification', COUNT(*) FROM sso_PartyIdentification_dml
UNION
SELECT '5', 'Unified Party Identification', COUNT(*) FROM UnifiedPartyIdentification_dml
UNION
SELECT '6', 'Unified Link Party Identification', COUNT(*) FROM PartyIdentificationIdentity_dml
ORDER BY 1
```

Results 1    Results 2

Order	Object	Count
1	Individual	60,057
2	Unified Link Individual	50,055
3	Unified Individual	50,046
4	Party Identification	50,009
5	Unified Party Identification	50,003
6	Unified Link Party Identification	50,009

# Data Cloud Video Hub

Partner video hub for Data Cloud  
<https://datacloud.hubs.vidyard.com/>

Data Cloud - Partner Product Success



**Accelerating Data Cloud Growth in FY25!**

February 22, 2024

Tracy Novotny

Accelerating Salesforce Data Cloud Growth with Our Trusted Partners in FY25!

Join our Data Cloud leadership team as they share:

- FY25 Product Vision
- GTM Strategy
- Partner Opportunities
- Updated Industry Use Cases
- Q&A

Speakers:

Rahul Auradkar, EVP & GM, Data Cloud  
Jason Little, SVP, Data Cloud Sales

Deck:  
<https://partners.salesforce.com/0694V0000Vd3yy>

Einstein 1 Platform Capabilities & Demo

5 Videos [View All](#)



# Data Cloud Partner Digest

Bi-weekly updates on Data Cloud



- Recently released features
- Important news & announcements
- Upcoming events & recaps
- Videos & recorded content



Slack Canvas Link:  
<http://sfdc.co/dcdigest>

Data Cloud Partner Digest for April 15, 2024

Edited 3 days ago



Data Cloud Partner Digest for April 15, 2024

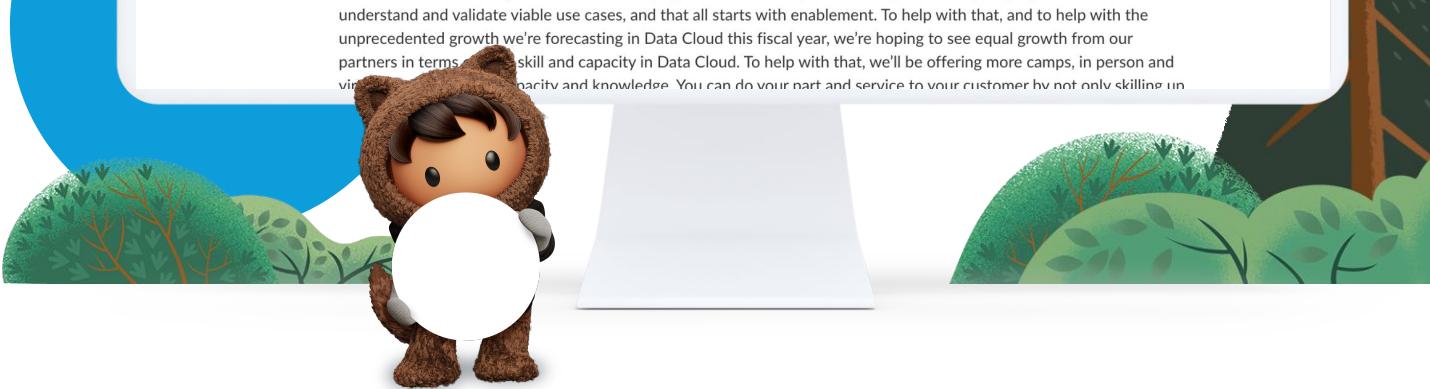
## Greetings from Europe!

The Data Cloud Partner Enablement team has been busy conducting implementation camps in London, Paris, and Amsterdam last week and this coming week, so we apologize for the delay in this latest issue. [Want us to visit your city?](#)

## News:

### Data Cloud Partner Summit in London

Partners from all around the world convened last week to discuss the future for our customers and the power that AI & Data Cloud can offer together. One of the top types of assistance partners can provide is by helping customers understand and validate viable use cases, and that all starts with enablement. To help with that, and to help with the unprecedented growth we're forecasting in Data Cloud this fiscal year, we're hoping to see equal growth from our partners in terms of skill and capacity in Data Cloud. To help with that, we'll be offering more camps, in person and virtually, to help you gain the skills and knowledge. You can do your part and service to your customer by not only skilling up



# Partner Readiness Guide to Data Cloud

Readiness Guide to help you understand Data Cloud



- Step by Step instructions
  - Product Readiness
  - Implementation Readiness
  - Ongoing Support
- Continuously evolving

<http://bit.ly/dcready>

An illustration of a brown bear wearing a white hoodie, standing in a green landscape with hills and trees. The bear is holding a large white circle in front of its chest. To the right of the bear, a laptop is open, displaying the "Partner Readiness Guide to Data Cloud" website. The website has a light blue header with the title and a navigation bar with links: Home, Say Hello to Data Cloud, Product Readiness, Implementation Readiness, Ongoing Support, and Feedback. Below the header, there's a main section with text about Data Cloud being the foundation of AI revolution and helping customers unlock their data. A callout bubble from the bear contains a note about the guide being continuously evolving and encourages checking back frequently.

Partner Readiness Guide to Data Cloud

Data is the foundation of the AI revolution. Helping customers unlock their data using **Data Cloud** is Salesforce's **top priority for growth**. This guide will help you understand **Data Cloud** and includes all the information you need to get started.

! Data Cloud resources are **continuously evolving**. Our readiness guide provides links to new and updated assets. Check back **frequently** to stay informed and leverage the most recent content.

# Data Cloud Cert Prep Resources

- Decks for these sessions will be provided here
- Review the knowledge check questions & answers



## Data Cloud Certification Preparation Resources

<http://sfdc.co/DCCertPrep>

This program is a series of weekly learning cohorts designed to prepare you for taking the Data Cloud Consultant Certification exam. All details on this program including dates, registration links can be found here  
<https://cloud.mail.salesforce.com/partnerdatacloud>

Cohort	Session	Session Date	Session Topics	Deck
Cohort 2	1	8/5/2024	Overview, Setup & Administration, Ingestion & Modeling	Will be provided
Cohort 2	2	8/7/2024	Unification, Segmentation & Insights, Act on Data	Will be provided
Cohort 2	3	8/9/2024	Cert Prep, Tips & Tricks	Will be provided

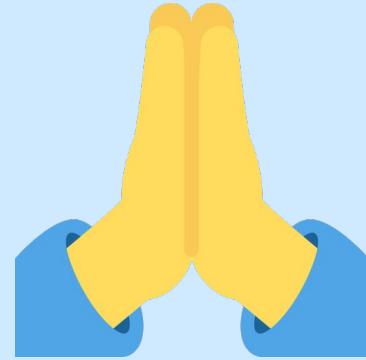
### Resources

- Data Cloud Partner Pocket Guide: <https://sfdc.co/datacloudpocketguide>
- Partner Readiness Guide to Data Cloud: <http://bit.ly/dcready>

# Voucher



...but first some feedback 😊





**Please share your feedback  
from our Cohort Series**

<http://sfdc.co/Cohort2Survey>



# Share your experience!



Now available on the Cert Prep Resources  
Page for you to share on your socials:  
<https://sfdc.co/DCCertPrep>





# Data Cloud Voucher Request Form

<https://sfdc.co/dcvoucher>



- Must complete Cohort
- One Voucher per Individual
- Registered Salesforce Partner
- Can only be used for Data Cloud Consultant Exam

# Data Cloud Cert Prep Cohort

## What's Coming Up Next?



- Program Overview
- Cover first 50% of the certification curriculum
- Share Optional Learnings



- Cover remaining 50% of the certification curriculum
- Share Optional Learnings



- Share tips & tricks for exam
- Show & Tell based on use case scenarios



# Learn Data Cloud in 1 Week!



Data Cloud Cert Prep Cohort

Join a Cohort

<https://sfdc.co/dcpartnercertprep>



# Q&A



salesforce

# Thank you

