



Data Cloud Certification Prep

Session 2 of 3
Unification, Segmentation & Insights, Act on Data,
and Administration



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?

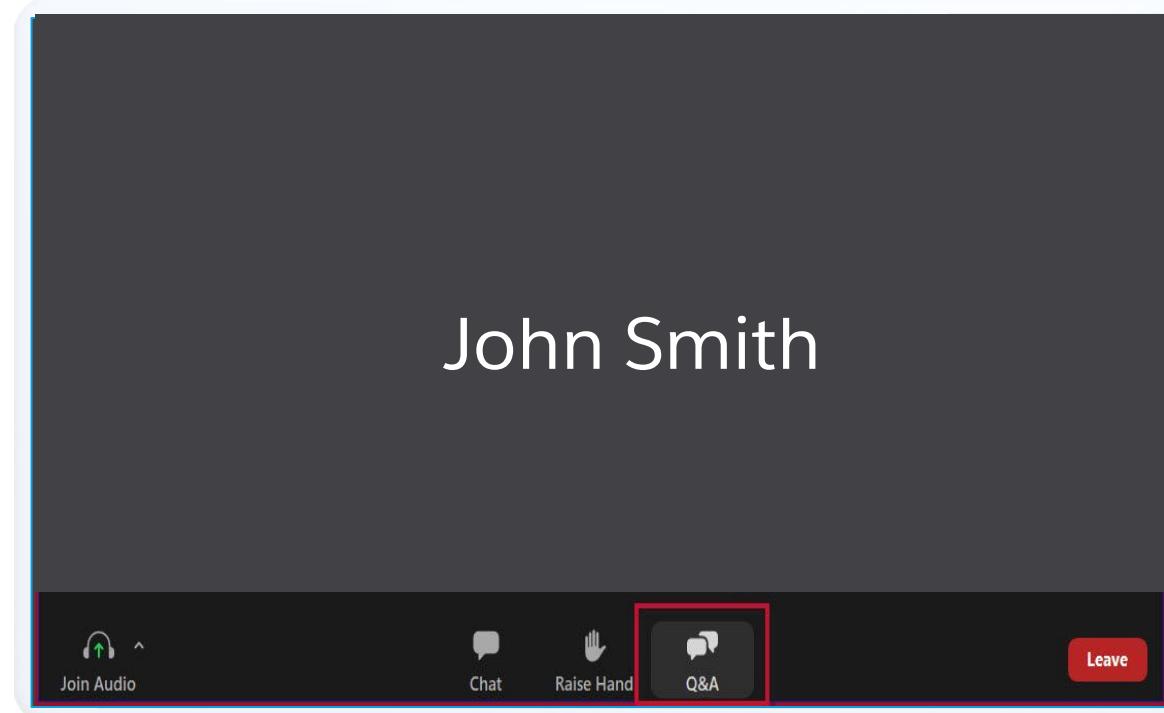
- At the bottom of your screen, click on “closed captions”

Slides

- Available in <https://sfdc.co/DCCertPrep>

Recordings

- Most Certification Prep sessions are NOT recorded
- There are Weekly Cohorts
- Sign up for another one here
<https://sfdc.co/dcpartnercertprep>



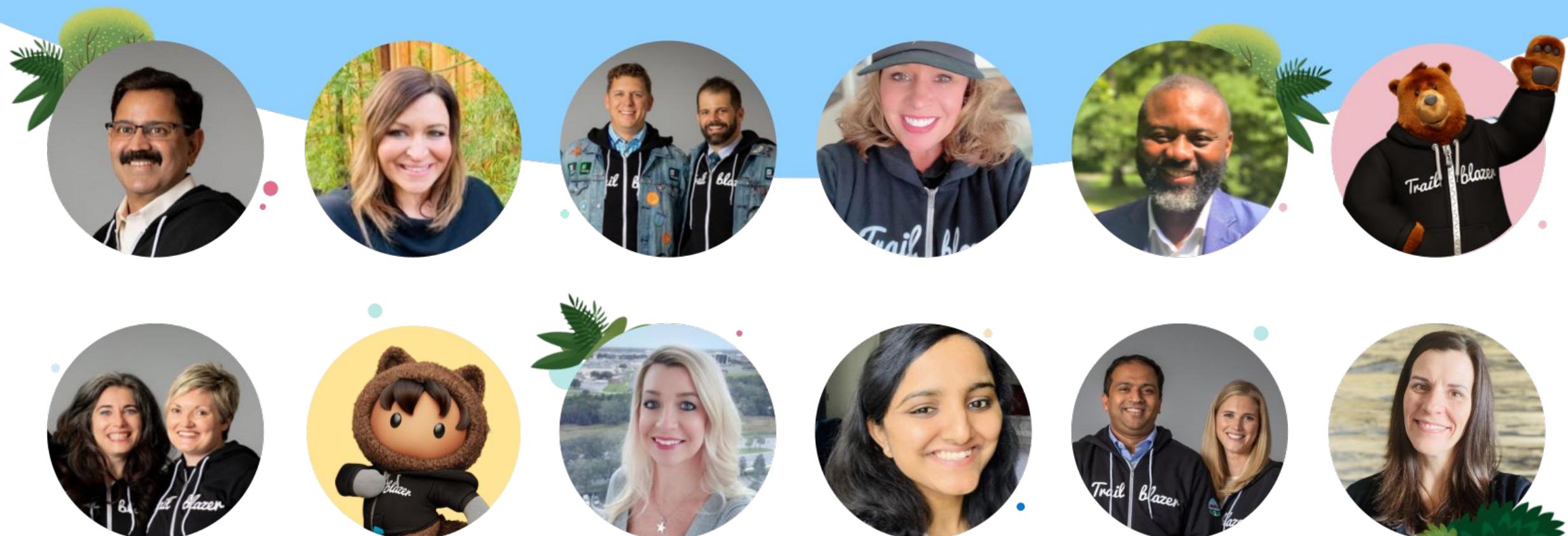
Forward-Looking Statement



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



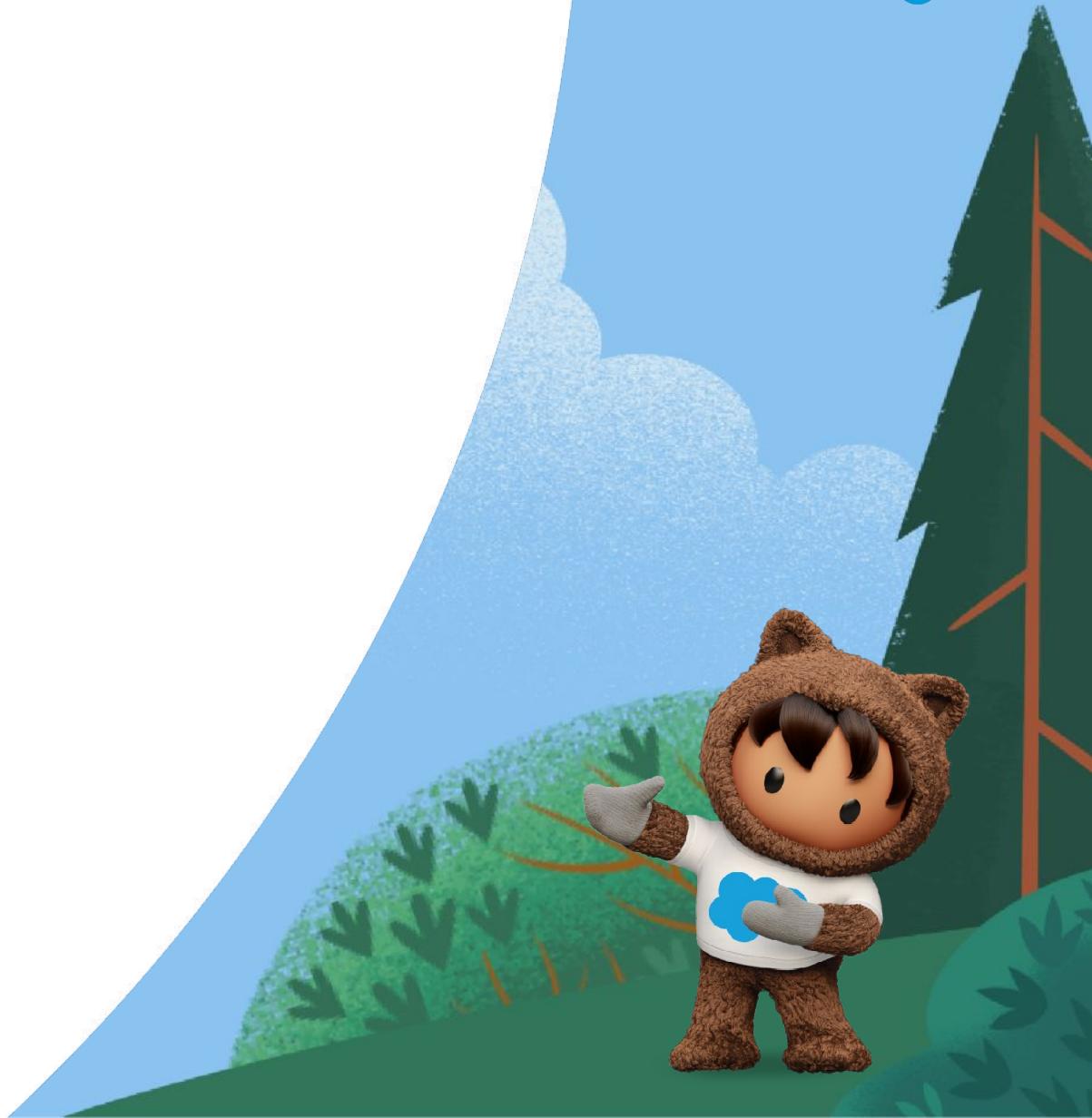
Today's Presenters



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>

The tablet screen shows the following information:

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	Zoom
#3	EMEA	Aug 12th, Aug 14th, Aug 16th	GMT 10:00 - 12 noon IST 2:30 PM - 4:30 PM	Zoom

Feedback from Past Cohorts:



Key Themes:

- **Time Management:** It's fast.
- **Content Delivery:** Clear, but surface-level
- **Practical Examples and Demos:** More hands-on!
- **Session Structure:** Theory, then structure?
- **Engagement and Interactivity:** More opportunities



Let's Clarify Expectations



Virtual Sessions

Instructor Lead, Cert Prep

Join a learning cohort! These virtual sessions will help guide your certification preparation.

[Register](#)



Trailhead

Unlock Your Data with Data Cloud.

Unify data from across your platforms with Data Cloud. Get hands-on and study for certification.

[Visit Trailhead](#)



Partner Learning Camp

Data Cloud: Practical Experience

Get practical experience with Data Cloud by completing hands-on exercises. Hopefully you've already completed the Prepare for Your Salesforce Data Cloud Consultant Credential Trailmix.

[Visit PLC](#)

(log into Partner Learning Camp before clicking this link)



Getting Started With Data Cloud



Partner Readiness



Partner Pocket Guide

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



Implementation Readiness

Deepening Expertise:

Step 1: [Advanced Data Cloud](#)

[Curriculum](#) (exclusively for Partners)

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

Step 2: Review the [Data Cloud Camps](#)

and Workshops offered by Partner Success and [sign up](#) to indicate your interest

Step 3: 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

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](#) (\$)

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

Data Cloud Learning Journey



Learning Time ~ 24 hrs



[Data Cloud Pocket Guide](#)

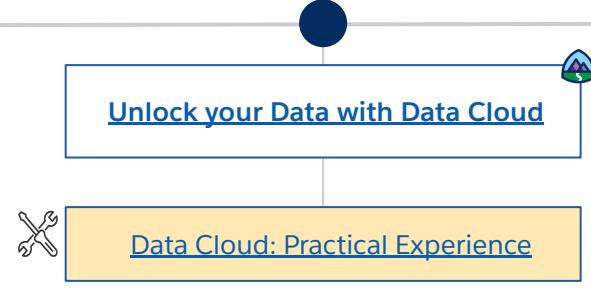
START
HERE



[Get Started with Salesforce CRM](#)

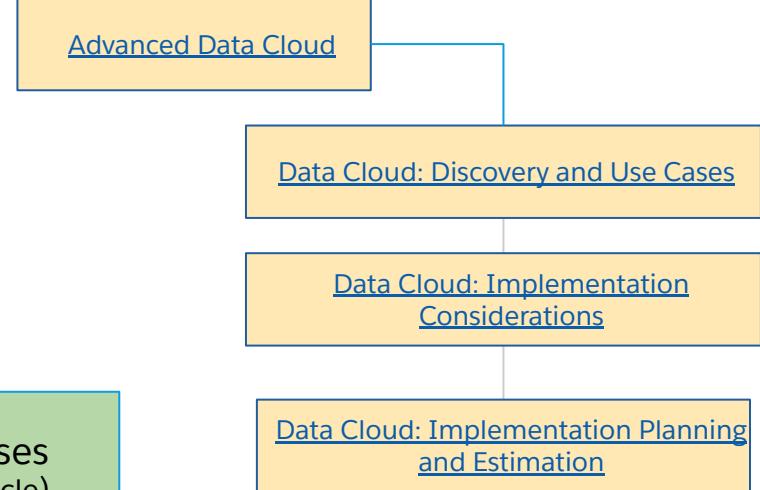


Begin Your Data Cloud Learning Journey



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)



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



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

Data Cloud Cert Prep Resources

- Decks for these sessions will be provided here
- Review the content esp 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>

Data Cloud Cert Prep Cohort

What Are We Focusing On Today?



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

2

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

3

- Share tips & tricks for exam
- Knowledge Check Questions
- Use case scenarios

Agenda

Identity Resolution | 14%

Segmentation & Insights | 18%

Act on Data | 18%

Administration | 12%

Knowledge Check

Q&A





Salesforce Certified Data Cloud Consultant

Total Question

60

Allotted Time

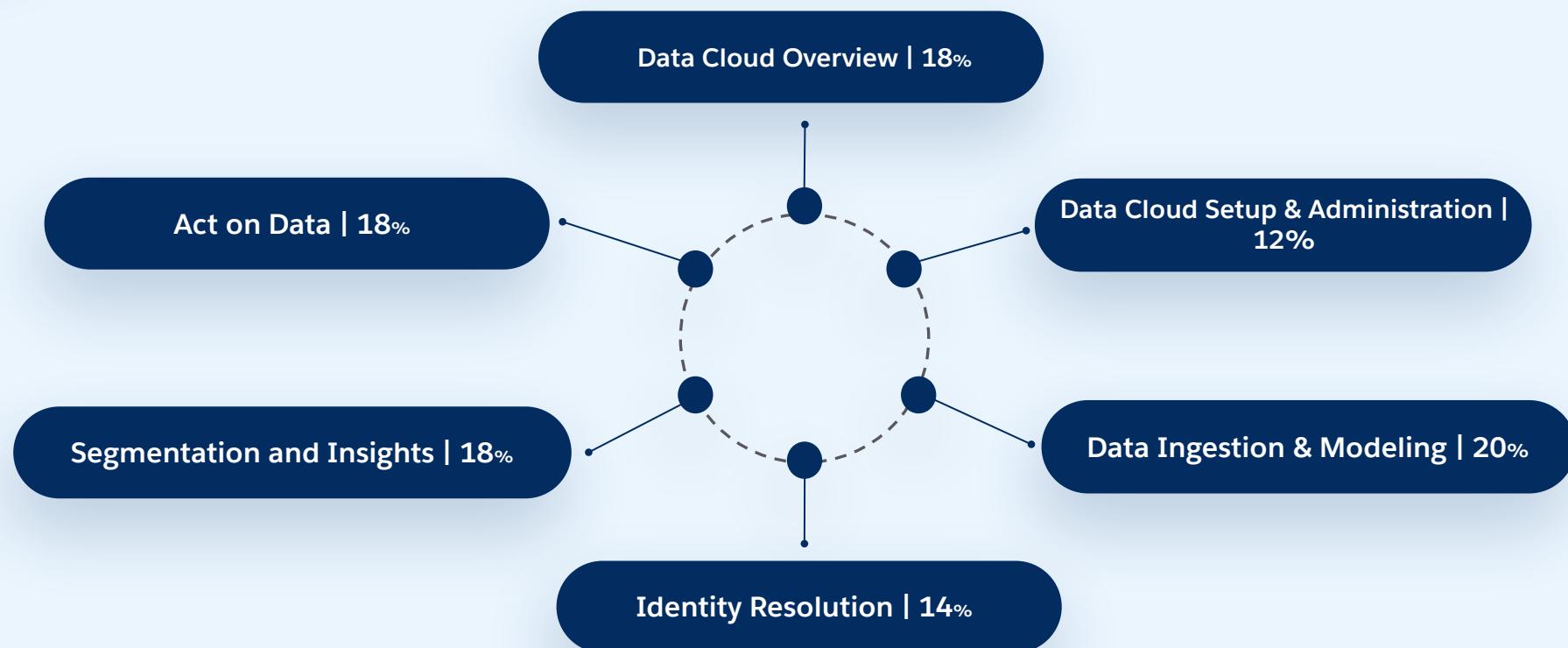
105 min

Passing Score

62 %



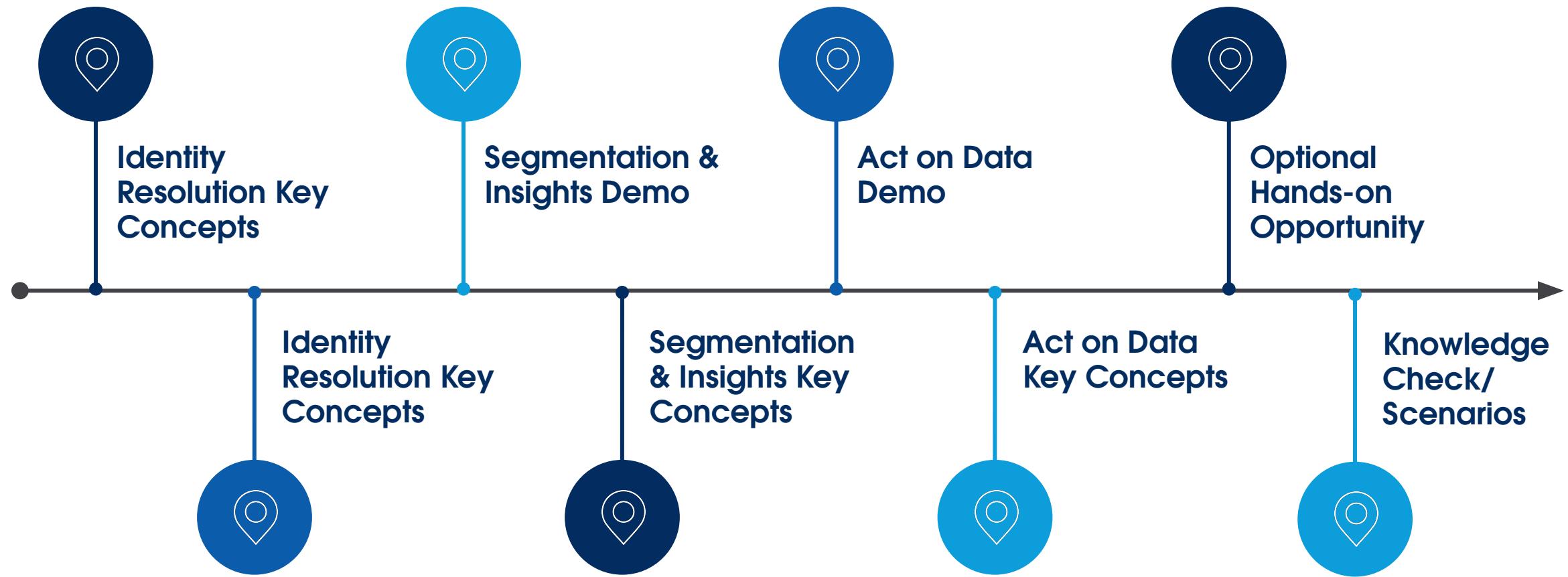
Exam Outline



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

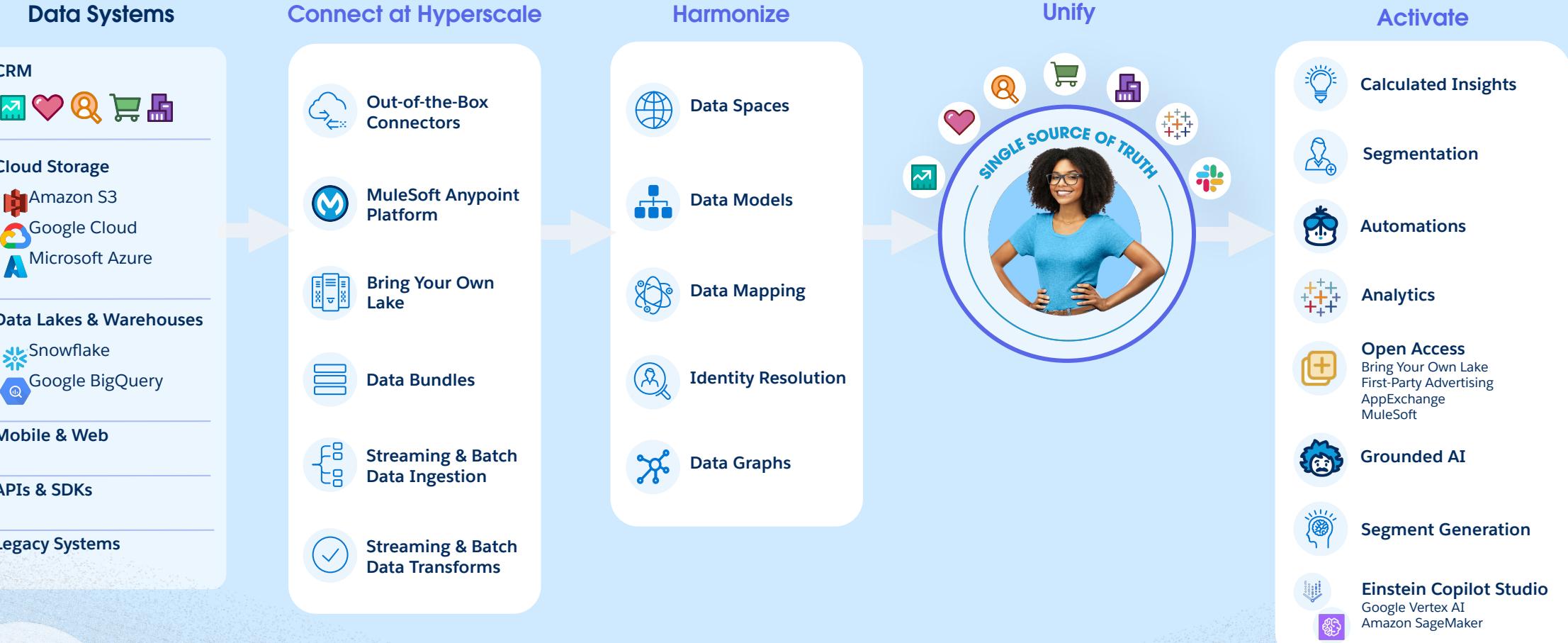


Our Plan for today?



Let's walk through how this works

A “day in the life” of customer data



Let's walk through how this works

A “day in the life” of customer data



Data Systems

CRM



Cloud Storage



Data Lakes & Warehouses



Mobile & Web

APIs & SDKs

Legacy Systems

Connect at Hyperscale



Out-of-the-Box Connectors



MuleSoft Anypoint Platform



Bring Your Own Lake



Data Bundles



Streaming & Batch Data Ingestion



Streaming & Batch Data Transforms

Harmonize



Data Spaces



Data Models



Data Mapping



Identity Resolution



Data Graphs

Unify



Activate



Calculated Insights



Segmentation



Automations



Analytics



Open Access

Bring Your Own Lake
First-Party Advertising
AppExchange
MuleSoft



Grounded AI



Segment Generation



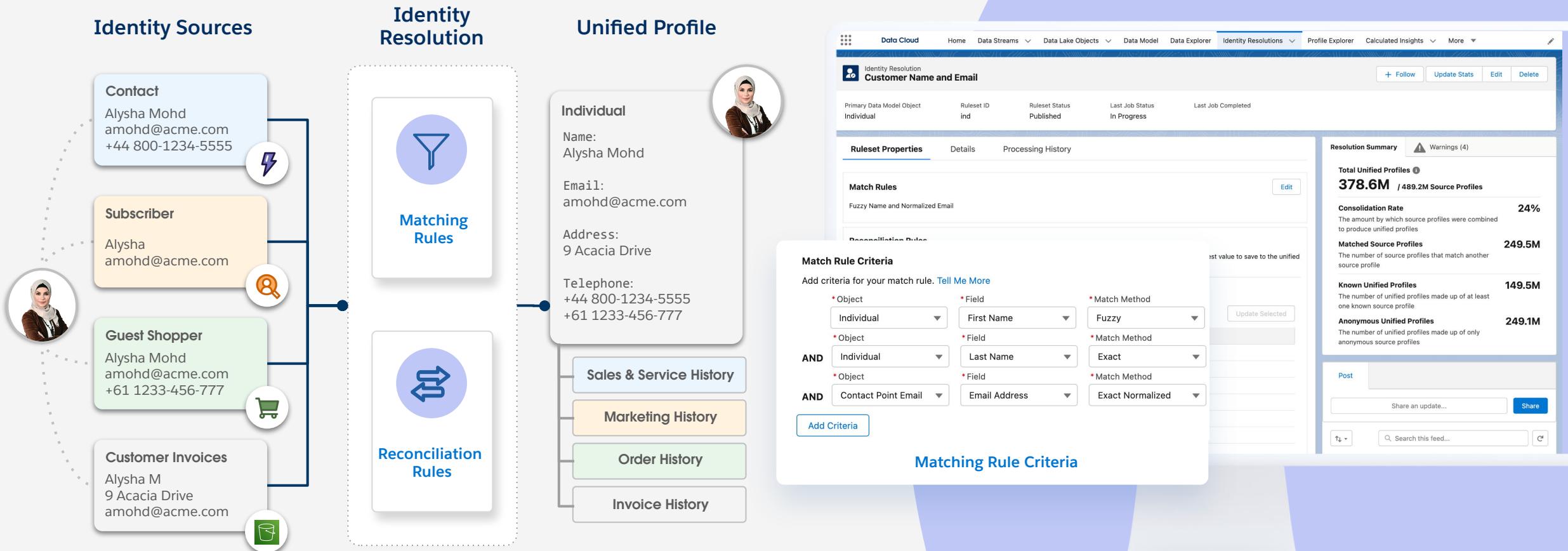
Einstein Copilot Studio

Google Vertex AI
Amazon SageMaker

Identity Resolution



Create a unified customer profile



Identity Resolution



Key Components & Terminology

Match Criteria

Match Rules

Attributes

Contact Points

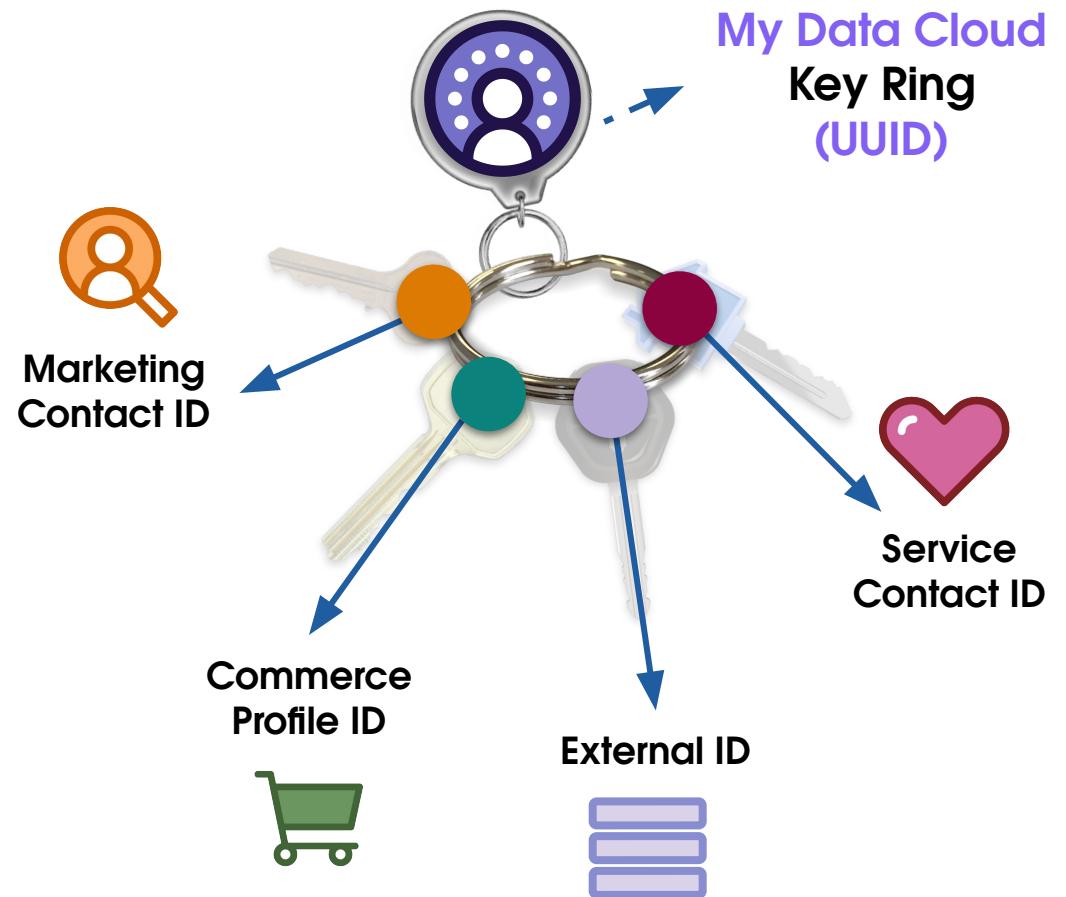
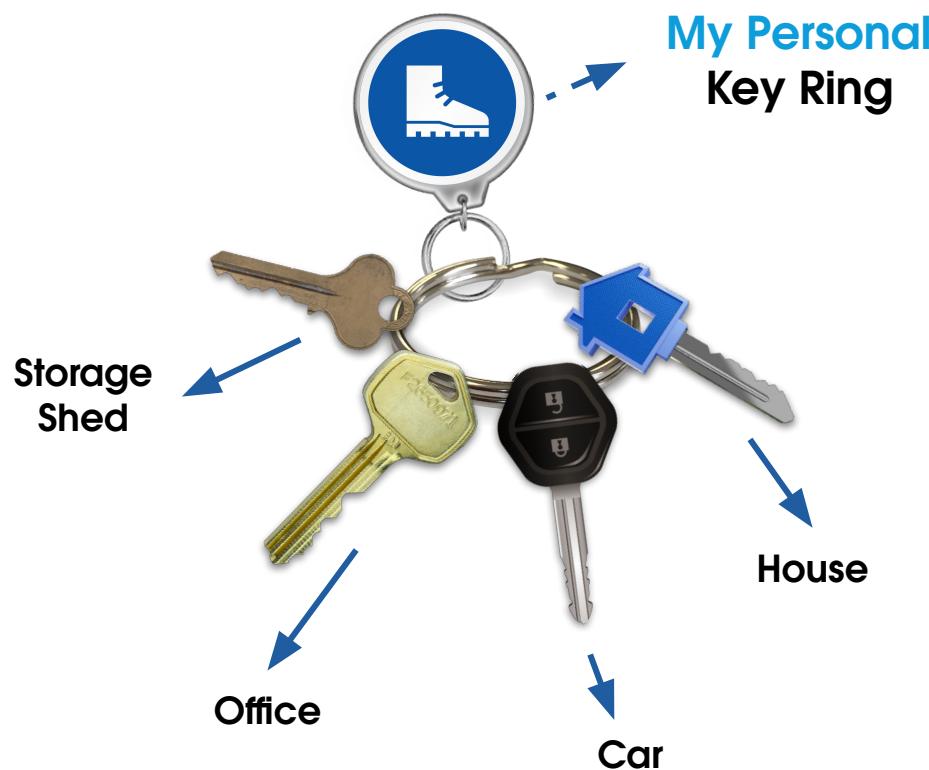
Reconciliation Rules

Identity Resolution Ruleset

- **Matching and Reconciliation** is a two part process
- **Matching** is the process of **grouping profiles together** through commonly shared criteria
- **Reconciliation** is the process of summarizing key attributes that have been unified
- Identity Resolution runs both processes in series: **matching first**, and **reconciliation second**
- The process can run manually or can be scheduled
- Accounts and Individuals can be unified
- The product of Identity Resolution is a **Unified Profile** and **Unified Link**

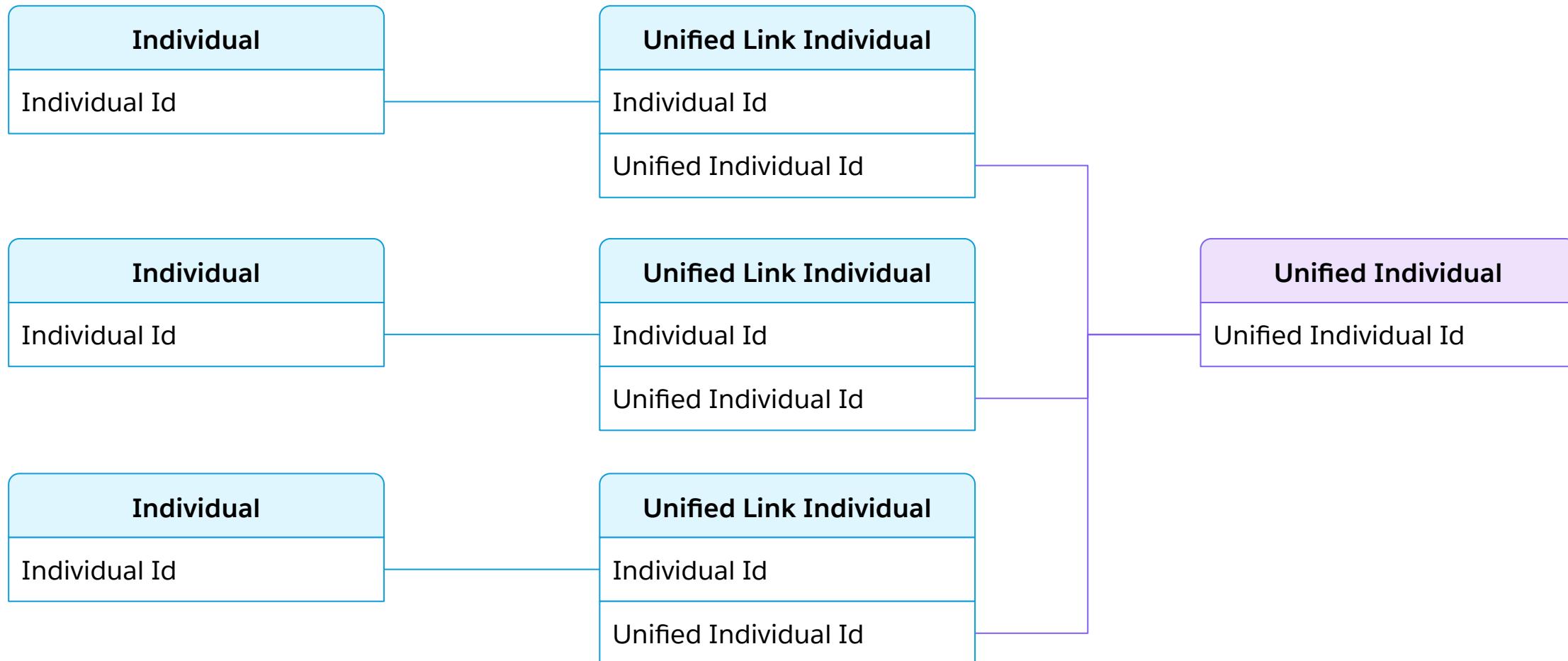
A Unified Profile is Like a Key Ring

It's the basis behind a system of reference



A Unified Link Connects Unified Profiles with Profiles

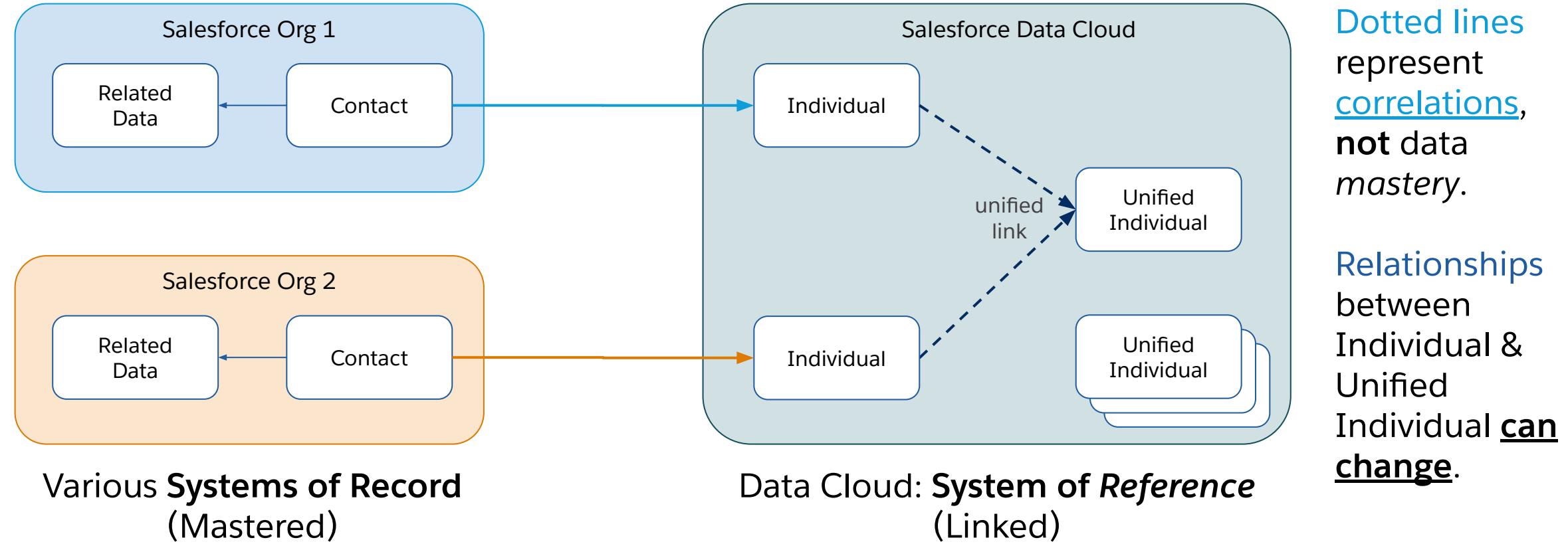
Every profile contains a link to its unified profile



System of Record vs. System of Reference



Mutable Unified Profile ID... always think of the Relationship Dotted Line

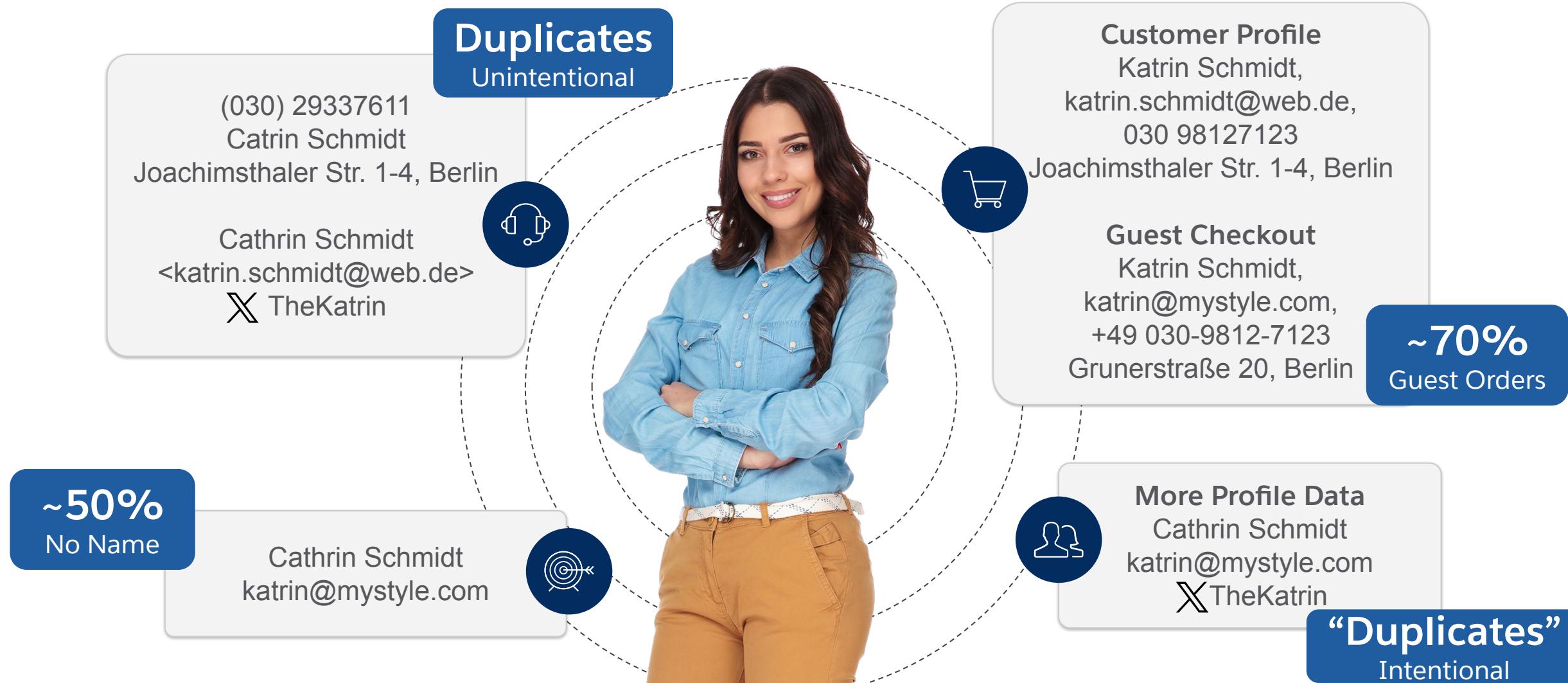


We do NOT *merge records* - each record continues to exist as linked but independent.

Challenge: Data is Distributed, Quality is Varied



Customers have multiple profiles, records, and contact points across systems



Let's take a deeper look at the presented information



How many Data Sources do you see? Source Records? Contact Points?

(030) 29337611
Catrin Schmidt
Joachimsthaler Str. 1-4, Berlin

Cathrin Schmidt
<katrin.schmidt@web.de>
X TheKatrin

Customer Profile
Katrin Schmidt,
katrin.schmidt@web.de,
030 98127123
Joachimsthaler Str. 1-4, Berlin

Guest Checkout
Katrin Schmidt,
katrin@mystyle.com,
+49 030-9812-7123
Grunerstraße 20, Berlin

Cathrin Schmidt
katrin@mystyle.com

More Profile Data
Cathrin Schmidt
katrin@mystyle.com
X TheKatrin



In this example there are 4 Source Systems

Service Cloud, Marketing Cloud, Commerce and Loyalty Cloud



there are a total of six records



Two Orders, a Contact, a Lead, Subscriber, Loyalty Member



Let's solve the connection one by one

Link the guest and registered user Orders by Name and normalized Phone



Let's solve the connection one by one

Using the guest's order secondary Email and Fuzzy Name



Let's solve the connection one by one

Connect the information from external systems via Party Identifier



Let's solve the connection one by one



Use Fuzzy Name and Address match to link the Service record with 2nd phone

1

(030) 29337611
Catrin Schmidt
Joachimsthaler Str. 1-4, Berlin

2

Cathrin Schmidt
<katrin.schmidt@web.de>
X TheKatrin

3

Cathrin Schmidt
katrin@mystyle.com



Customer Profile

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katrin.schmidt@web.de,
030 98127123

Joachimsthaler Str. 1-4, Berlin

4

Guest Checkout

Katrin Schmidt,
katrin@mystyle.com,
+49 030-9812-7123
Grunerstraße 20, Berlin

5

More Profile Data

Cathrin Schmidt
katrin@mystyle.com
X TheKatrin

6



Let's solve the connection one by one

Use Fuzzy Name and Email to link Marketing's record



Let's solve the connection one by one

Use Fuzzy Name and Email to link Marketing's record



Let's put our rules together

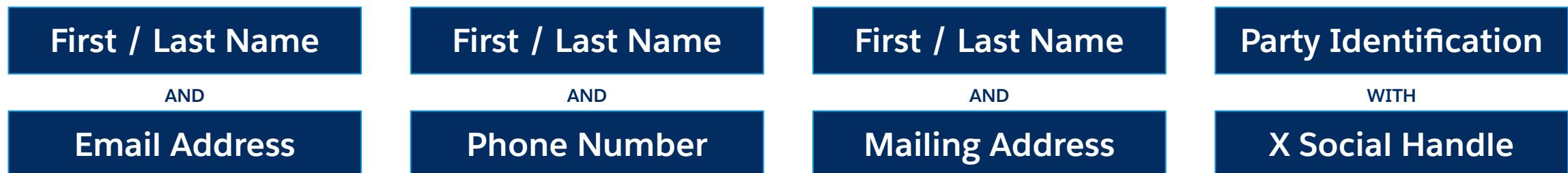


Start with basic criteria for what needs to be compared

We need to match on...

- First Name (Fuzzy) & Exact Last Name
- Mailing Address
- Email Address
- Phone
- Party (X Id)

Note: Matching on Personally Identifiable Information requires groupings



Organize our criteria into rules and rulesets



Key terminology and topologies! This will be on the exam.

Match Criteria: Requirements for two or more profiles to be linked together in a unified profile. Can use attributes, identifiers, or contact points in order to link.

Match Rule: A grouping of match criteria. Always uses AND operators.

Consolidation Rate: The percentage of profiles that have been matched



Question: Will adding more criteria increase or decrease the consolidation rate?

Organize our criteria into rules and rulesets



Key terminology and topologies! This will be on the exam.

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Match Rule: A grouping of match criteria. Always uses AND operators.

Consolidation Rate: The percentage of profiles that have been consolidated



Question: Will adding more criteria increase or decrease the consolidation rate?

Answer: Decrease. The more requirements that are needed to match a profile, the less likely it is that profiles will match.

Adding Criteria Decreases Match Likelihood



Only profiles with supporting match criteria will be evaluated

FName / LName

AND

Phone Number

Rule

Ind. Id	001	
First Name	Matt	
Last Name	Wash	
Phone	651-555-5555	
Email	mwash@salesforce.com	

Ind. Id	002	
First Name	Matthew	
Last Name	Wash	
Phone		
Email		

Ind. Id	003	
First Name	Matt	
Last Name	Wash	
Phone	651-555-5555	
Email		

Ind. Id	004	
First Name	Matthew	
Last Name	Wash	
Phone	651-555-5555	
Email	mwash@salesforce.com	

Adding Criteria Decreases Match Likelihood



Only profiles with supporting match criteria will be evaluated

FName / LName

AND

Phone Number

AND

Email

Rule

Ind. Id	001	
First Name	Matt	
Last Name	Wash	
Phone	651-555-5555	
Email	mwash@salesforce.com	

Ind. Id	002	
First Name	Matthew	
Last Name	Wash	
Phone		
Email		

Ind. Id	003	
First Name	Matt	
Last Name	Wash	
Phone	651-555-5555	
Email		

Ind. Id	004	
First Name	Matthew	
Last Name	Wash	
Phone	651-555-5555	
Email	mwash@salesforce.com	

Adding Criteria Decreases Match Likelihood



Only prof

So what do we do about Katrín?

We need a **ruleset**. A ruleset is a grouping of rules.

Yeah! My data is scattered! What do we do?

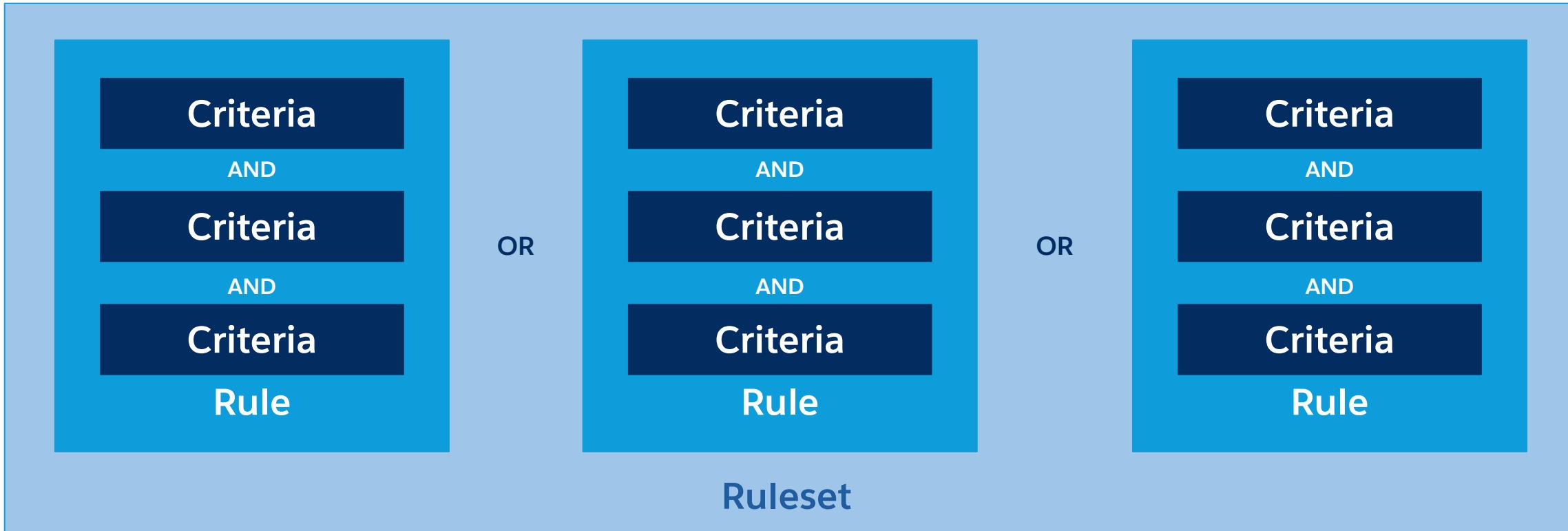


ce.com

Rulesets are a collection of Rules



Any number of rules can be contained within a single ruleset

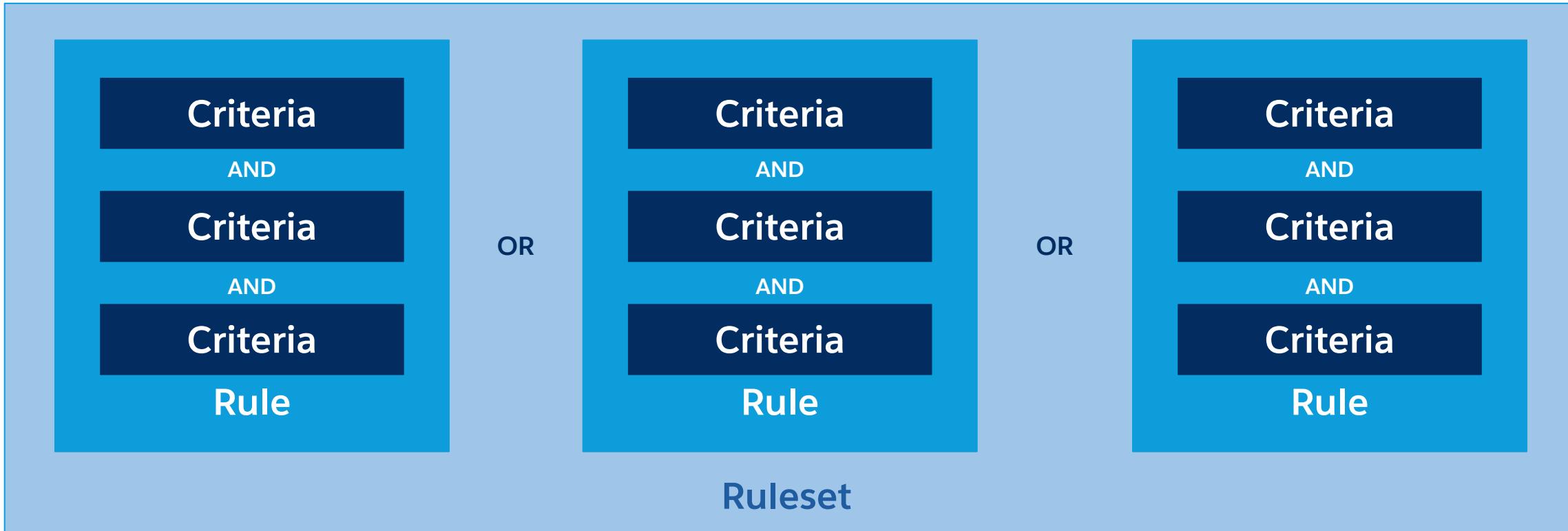


Question: Will adding more rules increase or decrease the potential match rate?

Rulesets are a collection of Rules



Any number of rules can be contained within a single ruleset



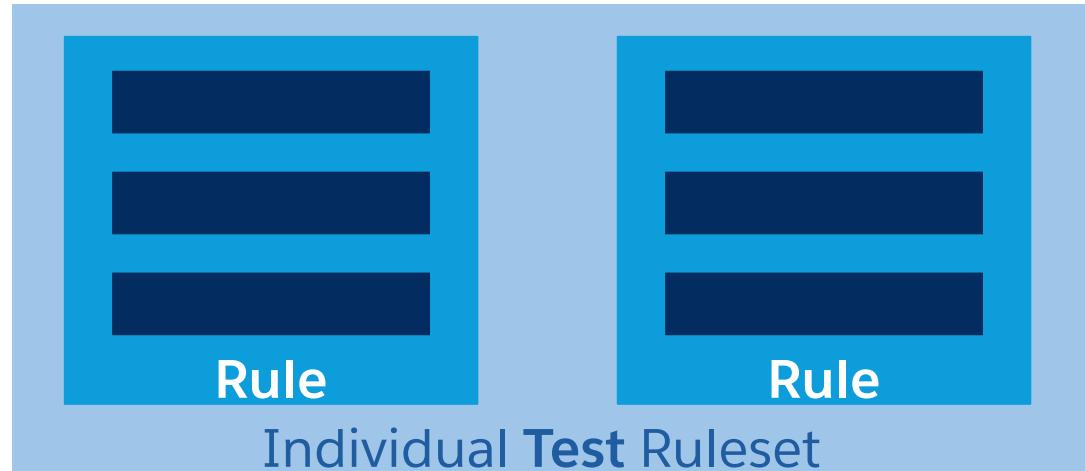
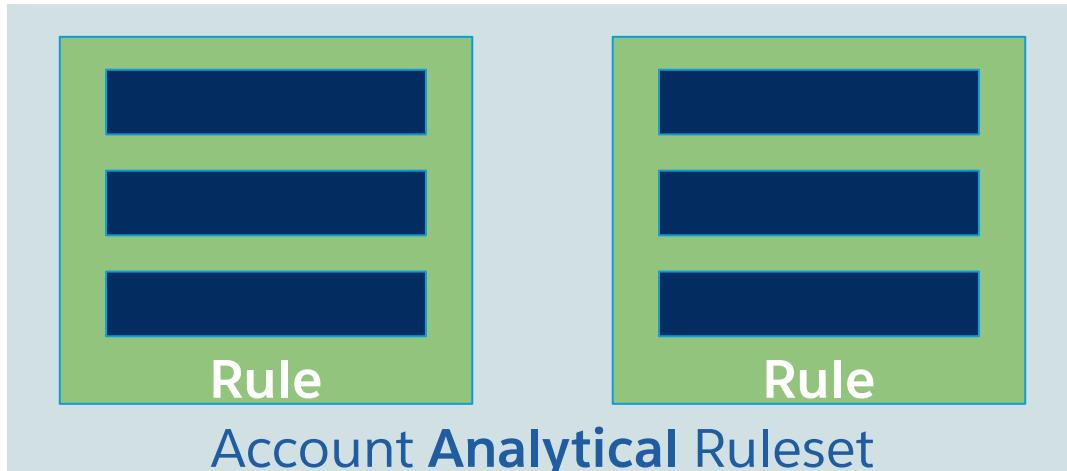
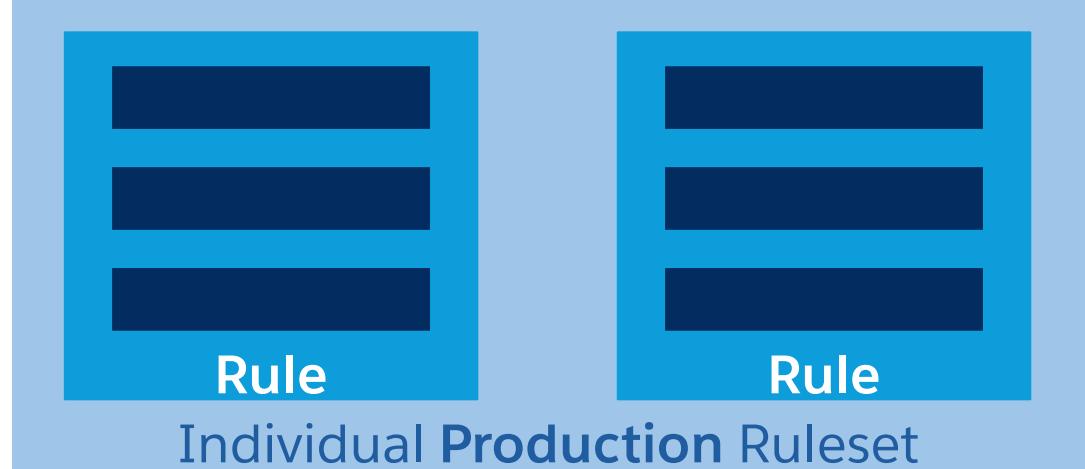
Question: Will adding more rules increase or decrease the potential match rate?

Answer: Increase. The more rules, the more opportunities to match.

You can have multiple rulesets



Accounts vs Individuals, Production vs Test, Analytical vs Operational





EXAM TIP



Quick Recap

Identity Resolution Basics

Identity Resolution is used to create a unified view of an account or an individual

Identity Resolution creates a Unified Profile and a Unified Link

The process is broken down into two stages, **matching** and **reconciliation**

Matching allows us to group individuals or accounts together based on matching criteria across sources

Reconciliation allows us to pick attributes to summarize a unified profile





EXAM TIP



Quick Recap

Matching Criteria, Rules & Rulesets

Data Cloud unifies profiles that share common **criteria**.

Groupings of criteria are called a **rule**

Adding **more criteria** **decreases** the match rate

Groupings of rules are called a **ruleset**

Adding **more rules** to the ruleset **increases** the match rate



Types of Match Criteria



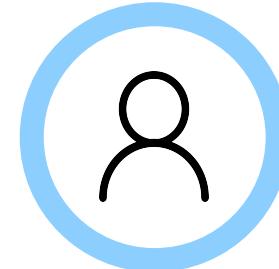
EXACT



PHONE



EMAIL



NAME



ADDRESS



DEVICE



PARTY ID

NORMALIZED



PHONE



EMAIL



NAME

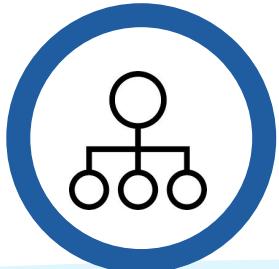


ADDRESS

FUZZY



NAME



OTHER
ATTRIBUTES*

- 3 Different Types of Precision
- Supports Latin-1 (ISO-8859-1) characters
- Not supported for Phone, Email, Address, Party Identification

Fuzzy (Probabilistic) First Name Match

Change sensitivity of match scores for First Name



Match Precision	Low Precision	Medium Precision	High Precision
Common Characteristics	Loose Similarities	Initials, Gender Variants, Shuffled Names, Similar Subnames	Nicknames, Punctuation Variation, International Abbreviations, International Alphabet, Cross-Cultural Spellings
Examples	<ul style="list-style-type: none">• Lisa, Liza• Cathi, Cathy• Lucia, Luc	<ul style="list-style-type: none">• S., Sharon• A.M., Anthony Michael• Cathi, Cathie• Lilian, Liliana• Gabriel, Gabrielle• José Andrés, Pepe• Joey James, James Joseph	<ul style="list-style-type: none">• Beatriz, Beatrice• William, Bill• Mary-Jo, MaryJo• Håkon, Hakon• Catherine, Katherine

High Precision - Includes a lot of common and expected patterns by Customers in matching scenarios. Common Nicknames from pre-validated lists. Resolving small punctuation errors ‘-’-esh, capitalization

Medium Precision - Includes all other patterns that are currently under general ‘Fuzzy’ solution such as matches on abbreviations, name-order and common names in multi-name words.

Low Precision - Matches above a minimal threshold that our team set as min bar for Fuzzy. Catches common misspelling errors, errors and less obvious to the eye matches

Match: Exact Normalized Email



Contact Point Email (Input Data)		
Id	Party (FK to Individual)	Email Address
1000-10-0001	IAN0-20-0001	FrankNoris@gmail.com
1000-10-0002	IAN0-20-0002	frankNoris@gmail.com
1000-10-0003	IAN0-20-0003	frankNoris@gmail.com
1000-10-0004	IAN0-20-0004	"FrankNoris@gmail.com"
1000-10-0005	IAN0-20-0005	<FrankNoris@gmail.com>
1000-10-0006	IAN0-20-0006	"franknoris"@gmail.com

Input data

- All data belongs to “Frank Noris” (matching Individual fields)
- Each Contact Point Address belongs to different Individual (Party)
- Email fields are the only Contact Points

Configured Match Rule

- Exact.First-Name + Exact.Last-Name + **Normalized.Email-Address**

Exact Normalized Email syntax is achieved via:

`javax.mail.internet.InternetAddress`

Recommendation

Extend the Match Rule to include more Individual fields, Full Contact Points, Party Identifiers and/or Custom fields

Match: Exact Normalized Address



Contact Point Address (Input Data)				
Id	Party	Address 1	City	Country
1000-10-0001	2000-20-0001	500 North Cabrillo Ave	NY	USA
1000-10-0002	2000-20-0002	500 North Cabrillo Ave	NY	US
1000-10-0003	2000-20-0003	500 N Cabrillo Ave	NY	U.S.A
1000-10-0004	2000-20-0004	500 Cabrillo Ave North	NY	USA
1000-10-0005	2000-20-0005	500 North Cabrillo Avenue	NY	USA
1000-10-0006	2000-20-0006	500 Cabrillo Ave N	NYC	USA

Addition Configurations Details for 6 different individuals

- All data belongs to “Michael Hoff” (matching Individual fields)
- Each Contact Point Address belongs to different Individual (Party)
- Address fields are the only shared Contact Points

Configured Rule

- Exact-Norm.Address1 + Exact.City + Exact-Norm.Country

- Common ML model parses and transforms the data for match purposes.
- Address1 matcher operates on common spelling, transposition, address-token's errors
- **Address.State Normalizer** supported for 11 Countries - Australia, Canada, France, Germany, Great Britain, Italy, Netherlands, Norway, Singapore, Spain, Turkey, United States
- **Address.Country Normalizer** supported for all Countries

Party Identification Object vs. Party



Use the Party Identification Object

Map third party identifiers, such as a Loyalty Member Number, to the Party Identification Object. This object aids identity resolution by matching additional identifiers, contact points, and data sources to the Individual ID.

IDENTIFICATION NUMBER	IDENTIFICATION NAME	PARTY IDENTIFICATION TYPE	PARTY	PARTY IDENTIFICATION ID
13175551234	MC Subscrber Key	Person Identifier	0032E0002T2JwkQAB	SFMC_13175551234
500420957	Loyalty Number	Person Identifier	0032E0002T2JwkQAB	d6cf6e34-b870-a96f812a5
00120123	Visitor ID	Person Identifier	0032E0002T2JwkQAB	SFCC_00120123
0032E0002T2JwkQAB	MC Subscrber Key	Person Identifier	0032E0002T2JwkQAB	CRM_0032E0002T2JwkQAB

Party Identification Object

Used to support unification and is critical when Exact Party IDs are used in Identity Resolution. Data Cloud recognizes that Individual ID has a 1-to-many relationship with Party.

Party

A field that acts as foreign key from the Party Identification and Contact Point objects to Individual ID.

The Individual ID must be mapped to the Party on every Contact Point you want to include in activation.



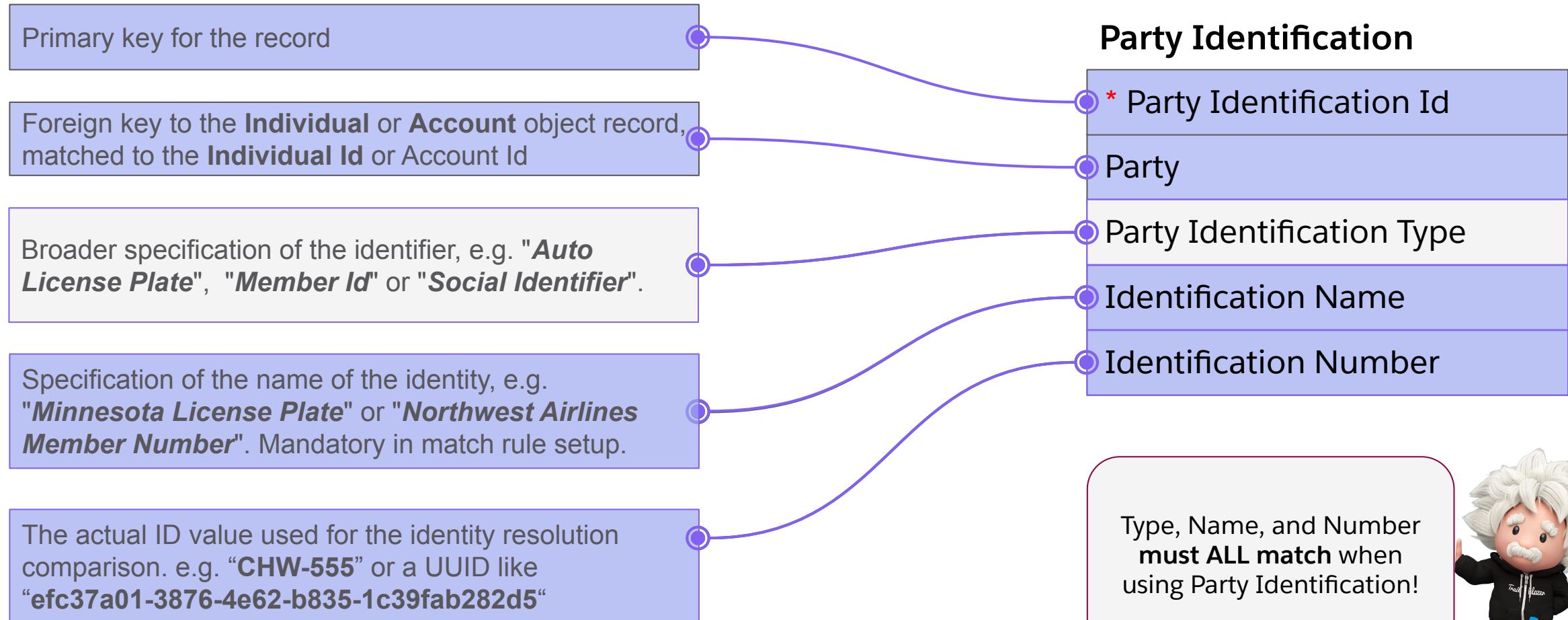
Party Id Matching

Let's explore this in more detail



KEY: REQUIRED

OPTIONAL



Type, Name, and Number
must ALL match when
using Party Identification!



Party Matching Pop Quiz - Will they Match?

Let's explore this in more detail



Source	Marketing Cloud Subscriber Key	Salesforce CRM Contact Id
Primary Key	SFMC003aK5adk00BNGD	CRM1003aK5adk00BNGD
Party Identification Type	System Id	System Id
Party Identification Name	SFMC Subscriber Key	CRM Contact Id
Party Identification Number	003aK5adk00BNGD	003aK5adk00BNGD
Party	SFMC003aK5adk00BNGD	CRM1003aK5adk00BNGD

Party Matching Pop Quiz - Will they Match?

Let's explore this in more detail



Source	Marketing Cloud Subscriber Key	Salesforce CRM Contact Id
Primary Key	SFMC003aK5adk00BNGD	CRM1003aK5adk00BNGD
Party Identification Type	System Id	System Id
Party Identification Name	SFMC Subscriber Key	CRM Contact Id
Party Identification Number	003aK5adk00BNGD	003aK5adk00BNGD
Party	SFMC003aK5adk00BNGD	CRM1003aK5adk00BNGD

Not a match. Although the two individuals share the same Party Identification Type and Party Identification Number, their **Party Identification Names do not match**, and thus won't be compared.

Quick Recap

Matching Criteria

You can match identities based on attributes (like first name, last name, date of birth), contact points (like email), or other identifiers.

Some attributes in match criteria can be normalized to allow for greater slight variation in the data's formatting.

Fuzzy matching allows for probabilistic matching of first names (nothing else).

Party Identification is a precise way to match identifiers across systems, but needs careful configuration to work correctly





Reconciliation



Reconciliation



The process of picking attributes to describe a unified profile

Rule-based

- Allows you to dictate a process for how field values are populated

Organized by Attributes

- Unified Profile Attributes and Contact Points can be Unified (but be careful how they're used)

Produced after Matching is Completed

The screenshot shows the Salesforce Data Cloud Identity Resolution interface. At the top, there's a navigation bar with tabs like Home, Data Streams, Data Model, Identity Resolution (which is currently selected), Calculated Insights, Alerts, Alert Targets, and Data Explorer. Below the navigation is a card for a 'Unified Individual' named 'Identity Resolution'. It shows details like Entity (Individual), Status (Published), Last Publish Status (Success), and Last Publish Date (7/21/2020, 11:24 PM). There are buttons for Follow, Publish..., Edit Properties, and Clone.

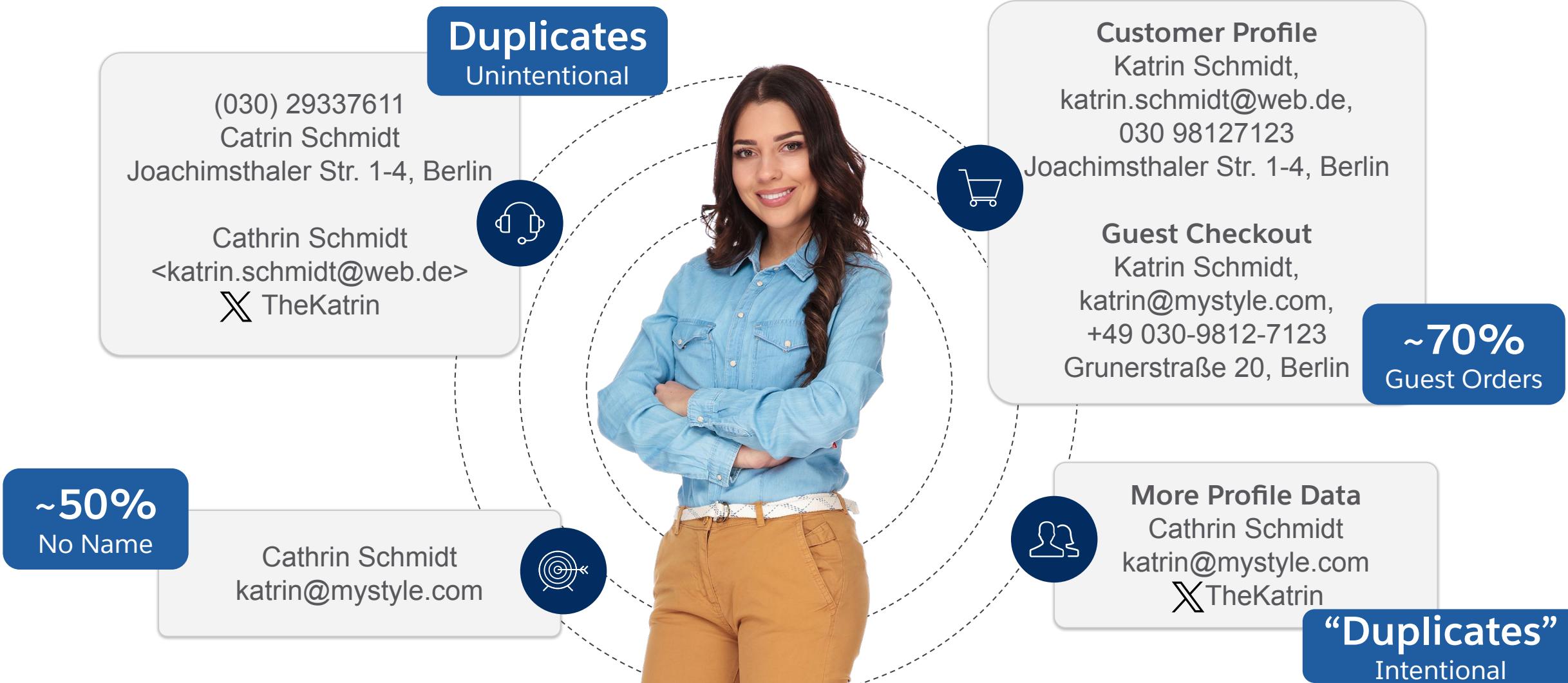
The main content area has tabs for Rule Configuration, Details, and Publish History. Under Rule Configuration, there's a 'Match Rules' section with two options: Fuzzy Name and Normalized Address OR Fuzzy Name and Normalized Email. A red box highlights the 'Reconciliation Rules' section, which is collapsed under 'Unified Individual'. This section contains a table with columns: Attribute (Date of Birth, First Name, Gender, Last Name, Middle Name, Salutation, Yearly Income), Default (✓), Reconciliation Rule (Last Updated), and Ignore Empty Value (✓).

To the right, there's a 'Resolution Summary' sidebar with metrics: Total Unified Individuals (378.6K), Consolidation Rate (24%), Known Unified Individuals (149.5K), and Unknown Unified Individuals (249.1K). At the bottom, there are buttons for Post, Poll, Question, and Share, along with a search bar and a 'Search this feed...' input field.

Reconciliation: Welcome Back, Katrin!



Customers have multiple profiles, records, and contact points across systems



Reconciliation: Welcome Back, Katrin!



Customers have multiple profiles, records, and contact points across systems



~50%
No Name

Your goal in Reconciliation is to determine which information should be prioritized in order to summarize her profile in a useful way

Duplicates”
Intentional

Reconciliation: Welcome Back, Katrin!



Customers have multiple profiles, records, and contact points across systems



Your tools:
Last Modified
Most Frequently Occurring
Source Priority

Duplicates”

Intentional

Reconciliation



Contact Point Phone

Individual

Default Reconciliation Rule: Last Updated

Field

Birth Date

Birth Date

Created Date

Data Source

Data Source Object

External Record Id

First Name

! Individual Id

Internal Organization

Last Modified Date

Last Name

Person Name

Salutation

> Party Identification

Edit Reconciliation Rule for Birth Date

By default, this field inherits the Last Updated reconciliation rule set as the default rule for this object. To change this rule, click the toggle switch below.

Default Reconciliation Rule Disabled

Field Reconciliation Rule

Last Updated Ignore Empty Values

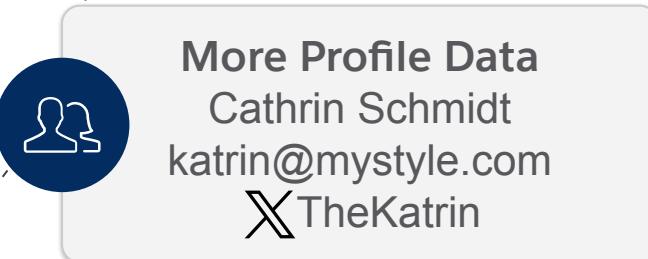
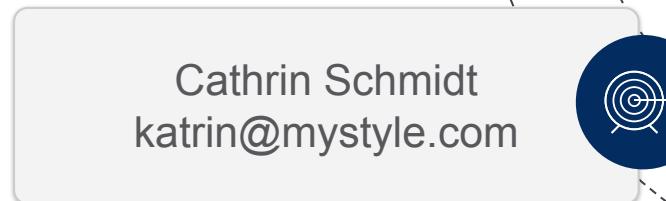
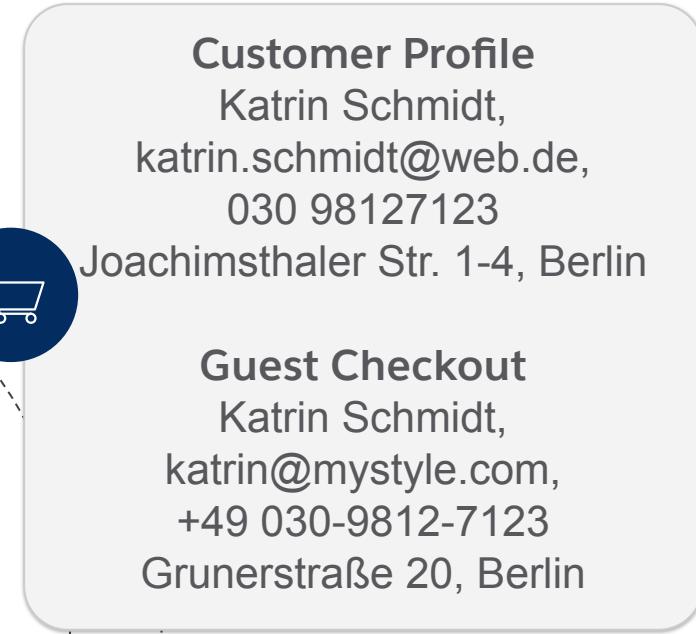
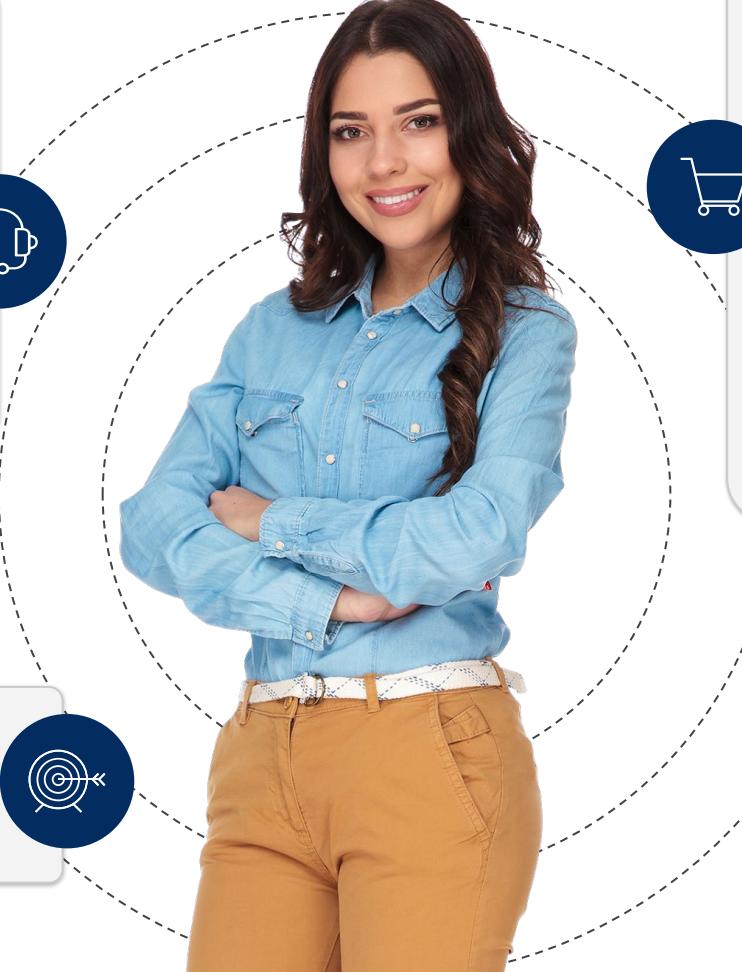
Field	Reconciliation Rule	Status
Last Updated	Last Updated	✓
Last Updated	Last Updated	✓
Last Updated	Last Updated	✓
Last Updated	Last Updated	✓

- > Contact Point Address
- > Contact Point Email
- > Contact Point Phone
- > Individual
- > Party Identification

Reconciliation: Welcome Back, Katrin!



Customers have multiple profiles, records, and contact points across systems



Reconciliation: Welcome Back, Katrin!



Tada! Look at our shiny new reconciled attributes

Unified Individual

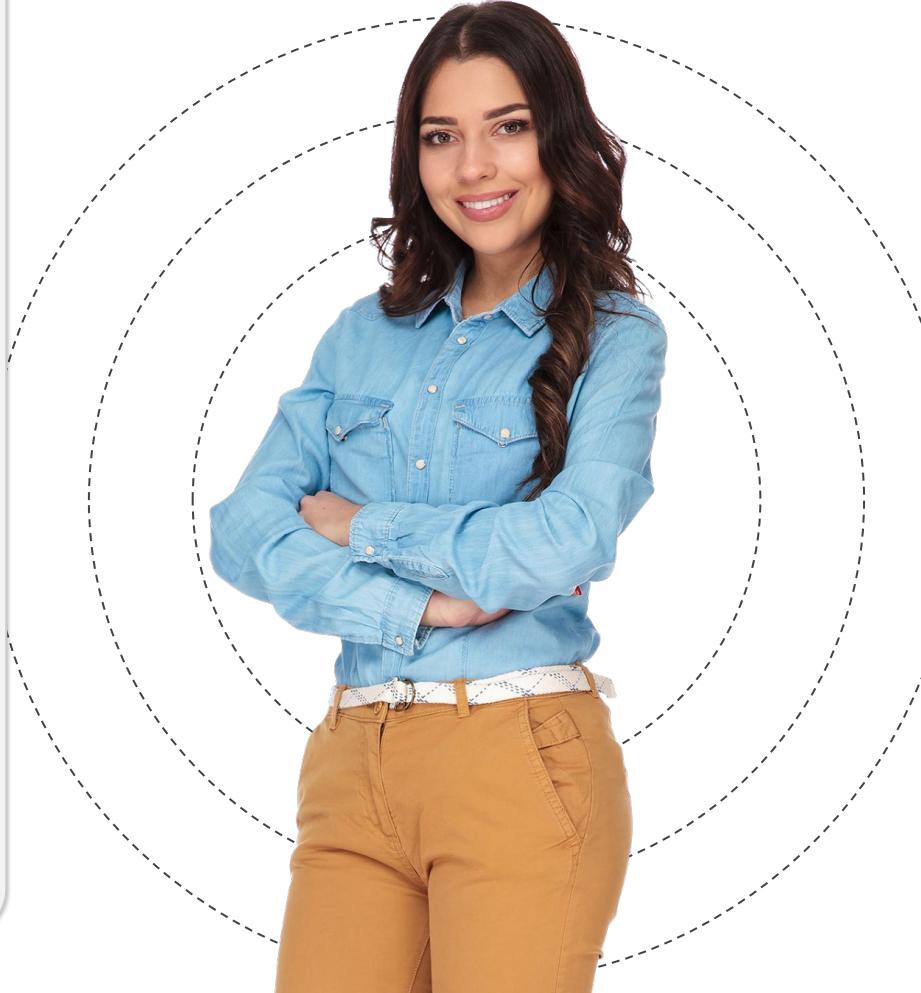
Name: Katrin Schmidt

Unified Contact Point Email:
katrin.schmidt@web.de

Unified Contact Point Phone:
030 98127123

Unified Contact Point Address:
Joachimsthaler Str. 1-4, Berlin

Unified Party Identification:
Number: TheKatrin
Party Name: X Username
Party Type: Social Handle

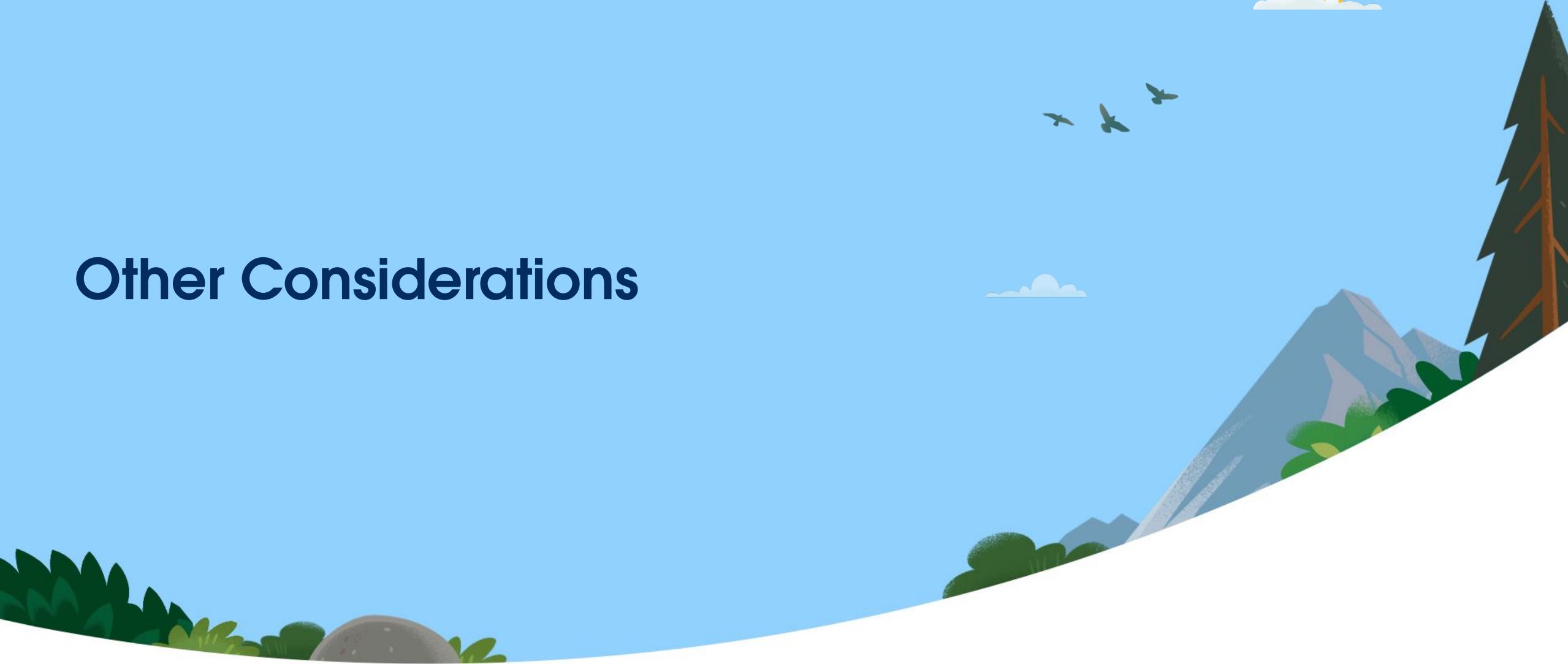


Where to use safely:
Reporting Tools
Dashboards
Service & Sales Consoles

Where to use CAUTION:
Customer facing
communications



Other Considerations



Unification Timings

Method	Refresh Rate	Latency
Create or Update Rules (either match or reconciliation)	On Demand	Instantly and maximum four times in 24 hours
Scheduled	Batch	Every 24 Hours



[Limits and Guidelines List](#)



Design Considerations

Few things to consider before finalizing your solution



1 Identity Resolution is an isolated/independent process. It does not rely or wait for any other activity to finish.

Q: Do you foresee any impact on data integrity/completeness because of it? Evaluate schedules for data ingestions, segment refreshes and activations.

2 As a result this process produces Unified Individual records, along with mapping to original Individual records and related contact points and party identifications. The Unified Individual assigned **mutable UUID**.

*Q: Does your design rely on this generated identity? Evaluate replacing direct use with lookup sequence instead, e.g. use Individual Id to retrieve **current UUID** and then remaining necessary data.*





Insights



Let's walk through how this works

A “day in the life” of customer data

Data Sources

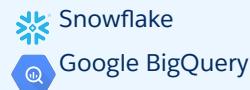
Customer 360



Cloud Storage



Zero-Copy Federation



Mobile & Web

APIs & SDKs

Legacy Systems

Connect & Prepare

Out-of-the-Box Connectors

MuleSoft Anypoint Platform

Data Bundles

Streaming & Batch Data Ingestion

Streaming & Batch Data Transforms

Harmonize

Data Spaces

Data Models

Data Mapping

Customer Graph

Identity Resolution

Act

Customer 360



Einstein



Einstein Studio



Segmentation



Calculated Insights



Automations



Analytics



Third Party



Calculated Insights

Think SQL on Unified Data



Build Multidimensional Metrics

Define multi-dimensional metrics such as LTV, CSAT, RFM and others on entire digital state stored in Data Cloud

Supercharge Segmentation

Use calculated insights in Segment Builder to gain deeper understanding of your customers

Activate for Personalization

Personalize using calculated insights

Profile API

Calculated insights available via API for use at every touchpoint

New Calculated Insight

Calculated Insight can affect Data Protection and Privacy compliance

Expression

```
SELECT
SUM(SALESORDER__dlm.grand_total_amount__c) as LTV__c,
Individual__dlm.Id__c as CustomerId__c,
MONTH(SALESORDER__dlm.checkout_date__c) as PurchaseMonth__c,
PRODUCT__dlm.product_category__c as ProductCategory__c
FROM SALESORDER__dlm
LEFT JOIN Individual__dlm ON SALESORDER__dlm.partyid__c = Individual__dlm.Id__c
LEFT JOIN SALESORDERPRODUCT__dlm on SALESORDER__dlm.orderid__c = SALESORDERPRODUCT__dlm.orderid__c
LEFT Join PRODUCT__dlm on SALESORDERPRODUCT__dlm.productid__c = PRODUCT__dlm.productid__c
GROUP BY PurchaseMonth__c, ProductCategory__c, CustomerId__c
```



Calculated Insights



Example: Measure Customer Lifetime Value

Description : Build custom calculated metrics to establish lifetime value or order summaries for fine tuned and reusable segmentation rules.

Sample Applications:

- Aggregate transactional orders against a customer to understand lifetime value
- Use value for segmentation
- Include in activation for use in personalization

Use Case Flow:



Ingest member transactions into Data Cloud from your data sources (like MC, SC,...)



Unify data



Calculate insights using builder or SQL



Segment based on value & use for personalization



Visual Insight Builder

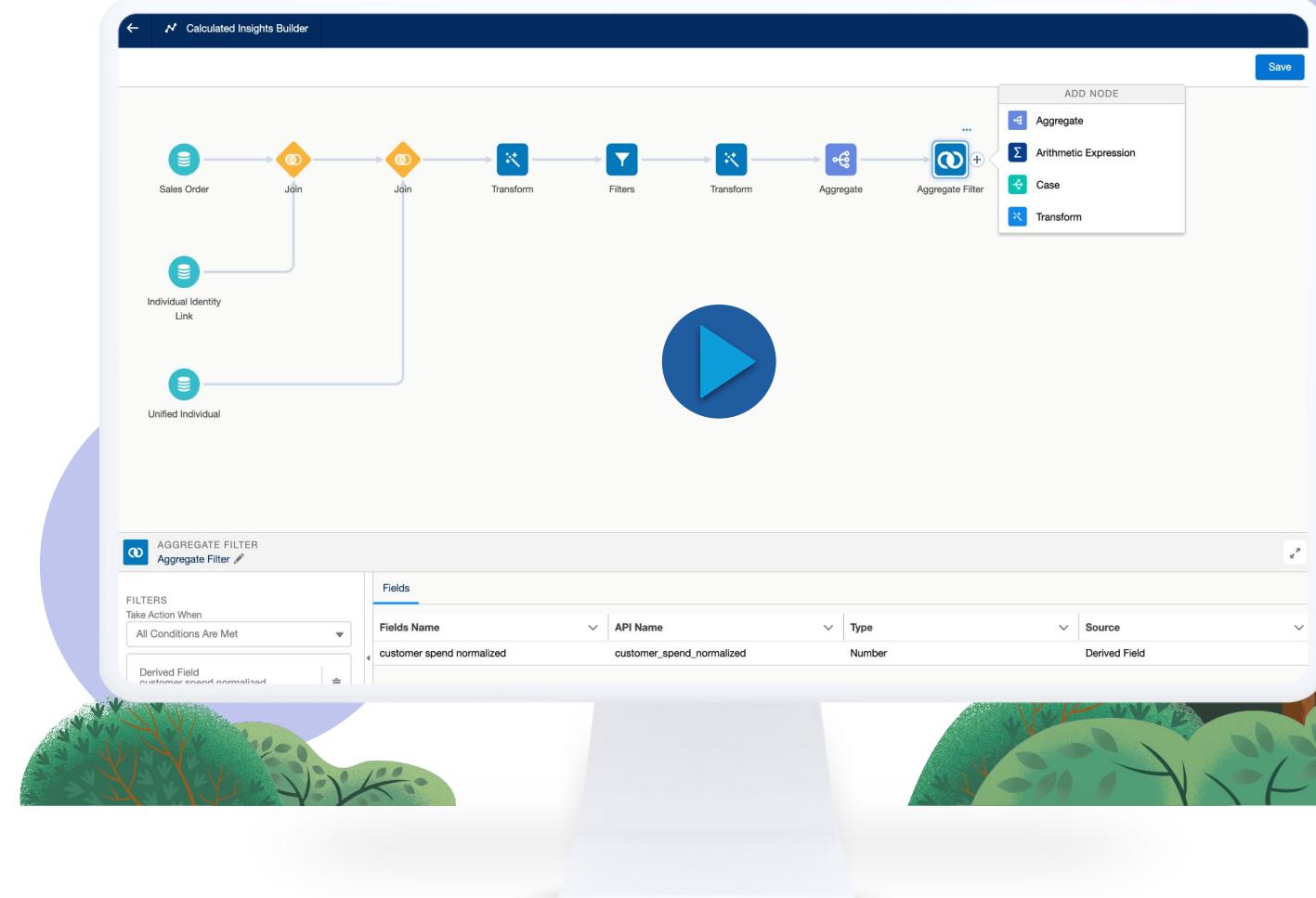
Create Calculated and Streaming Insights without SQL



Accessibility: This tool enables a broader group, including non-developers like analysts, to build insights if they understand the necessary steps.

Functionality: Users can join data sources, filter, transform, and aggregate data.

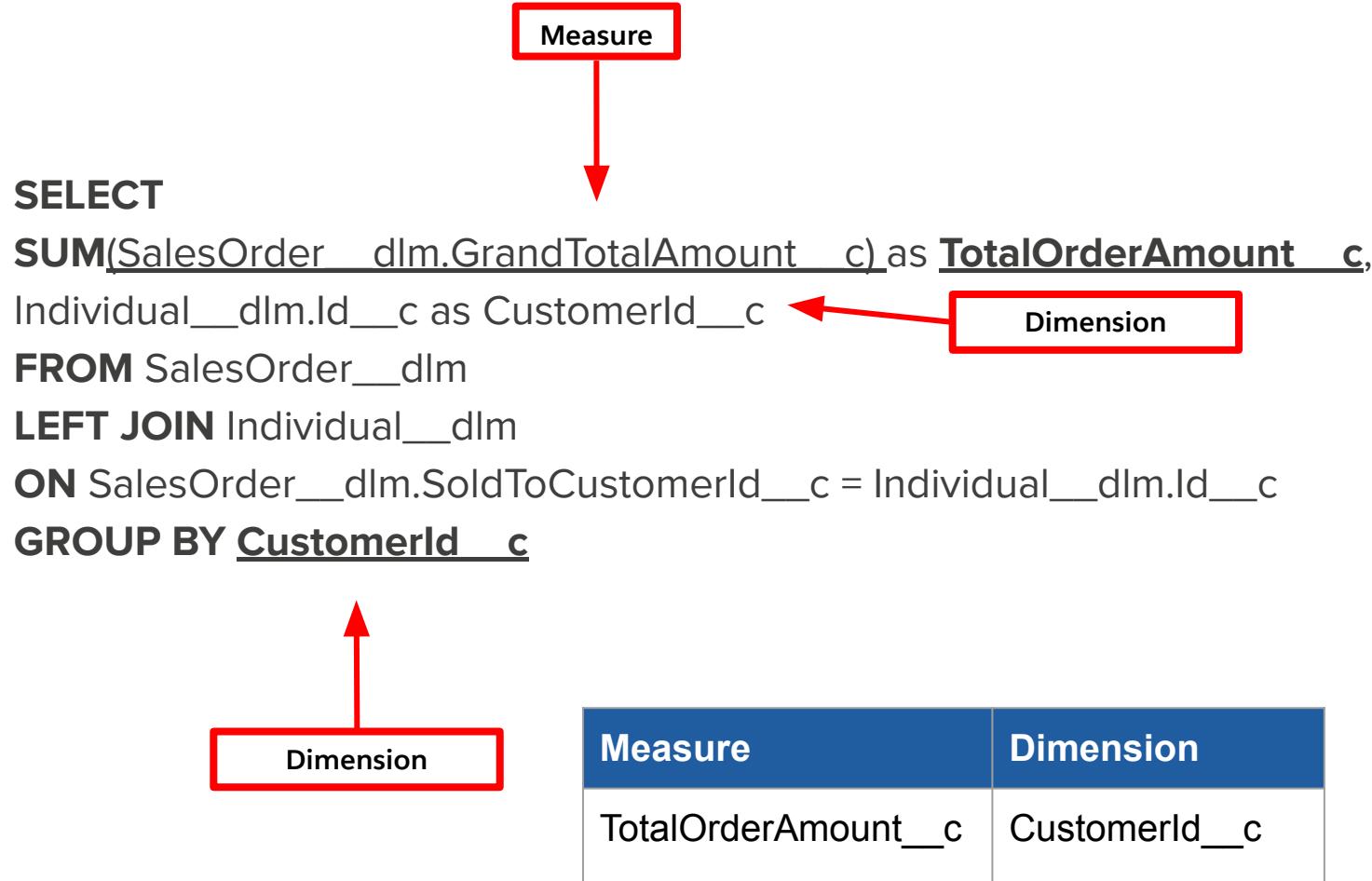
Key Requirement: For insights to be usable, they must include at least one metric (e.g., customer lifetime value) and one dimension (e.g., account or individual ID).



[Insight Builder supported functions](#)

Authoring Calculated Insight using SQL

Create rich insights using SQL



Useful Tips

- Measures and Dimensions must end with __c
- Measure must be an aggregate function
- There must be at least one Measure
- Only Numeric Measures are supported, Non numeric measures are not supported (e.g. Max(Date) will not work)
- Temp tables are not supported



Calculated Insights in Segmentation

Define criteria using metrics, dimensions and filters



- You can **filter on metrics**
- *Optionally, click add dimension* to further aggregate your data
- In order for Insights to appear in Segments, the **Insight should join back to the Unified Individual** in it's query



The screenshot shows the Salesforce Segment UI interface. It displays two segments side-by-side:

- TotalSpendUI Segment:** Segment On Unified Individual. This segment has no explicit filters applied. It lists several attributes:
 - Loyalty Status
 - Loyalty Tier Points
 - Opt_in_Date
 - Opt_in_Source
 - Preferred_Store
 - Primary Language
 - Program_Newsletter
 - Program_ProductUpdates
 - Program_PromosAndOffers
 - Subcategory_PreferenceA section titled "Calculated Insights:" contains three items: LTV (1), Purchase Insights (5), and RFM Segments (5). The "LTV (1)" item is highlighted with a purple oval.
- LTV Segment:** Segment On Unified Individual, Publish Schedule Don't refresh. This segment includes a filter for "LTV_c" where "Is Greater Than" is set to 20. It also includes a "Where" clause with two conditions:
 - ProductCategory_c Contains "Ab"
 - ProductSubCategory_c Is Equal To "Glass"A red message "Complete this field." is visible next to the second condition. A blue button "+ Add Dimension" is located at the bottom right of the "Where" section.

Calculated Insights in Segments



Calculated Insights in Activation

Enable journey decisions and message personalization



- Calculated Insights **metrics** can help **drive content personalization** in Marketing Cloud
- Drag your completed insight metrics onto **any new or existing activation**
- Add **dimension filters** to your Calculated Insights metric for more granular insights on an activation.



Edit Activation

*Select a path to the Email
Contact Point Email.Party > Individual.Individual Id
Include a mobile phone number in this segment
*Select a path to the Phone
Contact Point Phone.Party > Individual.Individual Id

Email Type: Any

Phone Type: Any

Select Additional Attributes (optional)

Attributes: Internal Organization, Last Name, Metrics: NumberOfTransactionByCustomer..., NumberOfTransactions__cio (1), Store_Visits__cio, TotalOrders__cio (1)

4 Attributes Selected: Individual, Individual Id, First Name, Last Name, Store_Visits__cio, Store_Visits__c

Clear

Edit Filters for 'LTV_c'

You can customize this attribute with filters

Attribute: LTV_c Where

* Dimension: ProductCategory_c * Operator: Contains * Value: Perq

+ Add Dimension

Calculated Insights in Activation



Calculated Insights in Data Actions

Trigger Journeys and Platform Events



- New Insights or Changes in Calculated Insights can now drive Data Actions
- Data Actions can trigger platform events in CRM, Emails or Journeys in Marketing Cloud, or external processes via webhook
- Powerful capability to orchestrate and automate processes across Marketing, Sales, and Service



New Action

Event and Action Rules

Event Rules ⓘ
Select record actions that trigger the action.

Record Created
 Record Updated
 Record Deleted

Action Rules

* Publish data when:
All Conditions are Met (AND)

+ Add Condition

Trigger Data Action for Updated Records ⓘ
 (Default) Every time a record update meets these conditions
 Only the first time a record update meets these conditions

Back Next

Summary

Data Action Target
Home Org Platform
Salesforce Platform Event

Data Space
default

Primary Object
Account
Data Model Object

Related Object
Individual
Data Model Object

Event Rules
Record Updated

Related Attributes

Change Event Triggers in Calculated Insights



Calculated Insights - Limitations on Measures

Gotchas for the Exam. Study these!



OK

- You can add a measure to an existing calculated insight.
- You can add **ONLY** aggregatable measures to an aggregatable calculated insight.
- You can add any measure to a non-aggregatable calculated insight.

NOT OK

- You can't remove existing measures.
- You can't change the API name, data type, or rollup behavior.



Article:
http://sfdc.co/ci_guidelines



Streaming Insights



Build Multidimensional Metrics

- Create metrics on streaming data coming from **real-time data sources** to use ***real-time insights***
- Streaming Insights are similar to Calculated Insights, but have specialized functions to deal with streaming data

Drive events using Data Actions

- Supercharge your event-driven apps, orchestration and integrations with Data Actions
- Filter and reliably **deliver custom events**
- Manage routing of data and insights from Data Cloud in ***near real-time***

The screenshot shows the Salesforce Streaming Insights interface. At the top right, it says "New Streaming Insight". Below that, there are two tabs: "Fields" (which is selected) and "Functions". A search bar labeled "Search Fields" is present. To the right of the search bar, there is a note: "Calculated Insight can affect Data Protection and Privacy compliance. Tell Me More". Another note below it says: "Streaming insight expression requires the use of streaming data and special functions". Under the "Fields" tab, a list of fields is shown, each preceded by a greater-than symbol (>). The fields listed are: Contact Point Email Identity Link, Individual, Individual Identity Link, Party Identification Identity Link, Unified Contact Point Email, Unified Contact Point Email ABTT, Unified Individual, Unified Individual ABTT, Unified Link Contact Point Email ABTT, Unified Link Individual ABTT, and Unified Link Party Identification ABTT. To the right of the field list, there is an "Expression" section with a "Examples" button. An example query is provided:

```
SELECT <Aggregation(Attribute)> as <measure_c>, <Dimension> as <dimension_c>, WINDOW.START as start_c, WINDOW.END as end_c FROM <Data Model Object> GROUP BY window(<DateTime_c>,'<Time Interval> MINUTE'), <dimension_c>
```

Insights Use Cases

Practical Examples



Calculated Insights

Lifetime Value Calculation

Recency, Frequency, Monetary Value

Spend by Customer and Product

Engagement Buckets & Scoring

Ranking by Category Item Purchase Count

Unified Health Score (Health Cloud)

Streaming Insights

Service & Support: Automatically log a case if customer visits multiple troubleshooting pages

Location Based Engagement: Initiate a workflow if user enters a geofence

Log Scanning: Filter streaming device log data (e.g. mobile app, kiosk) and send to other systems



Considerations for Streaming Insights with SQL

Streaming insights are near-real time and are used in scenarios where access to low-latency data & insights is critical.

The **Window** function is required to determine the ***aggregate time window*** where the minimum is 1 minute and the maximum is 24 hours.

Additional Streaming Insight Tips

- SUM and Count are the only aggregate functions available
- Must use the WINDOW function

```
SELECT <Aggregation(Attribute)> as <measure_c>,
       <Dimension> as <dimension_c>,
       WINDOW.START as start_c,
       WINDOW.END as end_c
  FROM
    <Data Model Object>
 GROUP BY
   window(<DateTime_c>,'<Time Interval> MINUTE'),
   <dimension_c>
```

Understanding streaming Insights



Aggregates

12.00-12.05	Customer ID: 1, PageViews: 5, Product: HK0012
12.00-12.05	Customer ID: 2, PageViews: 1, Product: JK0078

12.00

12.05

12.10

Time

Events

12.01: Customer ID = 1, Action: Pageview, Product: HK0012

12.02: Customer ID = 1, Action: Pageview, Product: HK0012

12.02: Customer ID = 1, Action: Pageview, Product: HK0012

12.03: Customer ID = 1, Action: Pageview, Product: HK0012

12.04: Customer ID = 1, Action: Pageview, Product: HK0012

12.04: Customer ID = 2, Action: Pageview, Product: JK0078

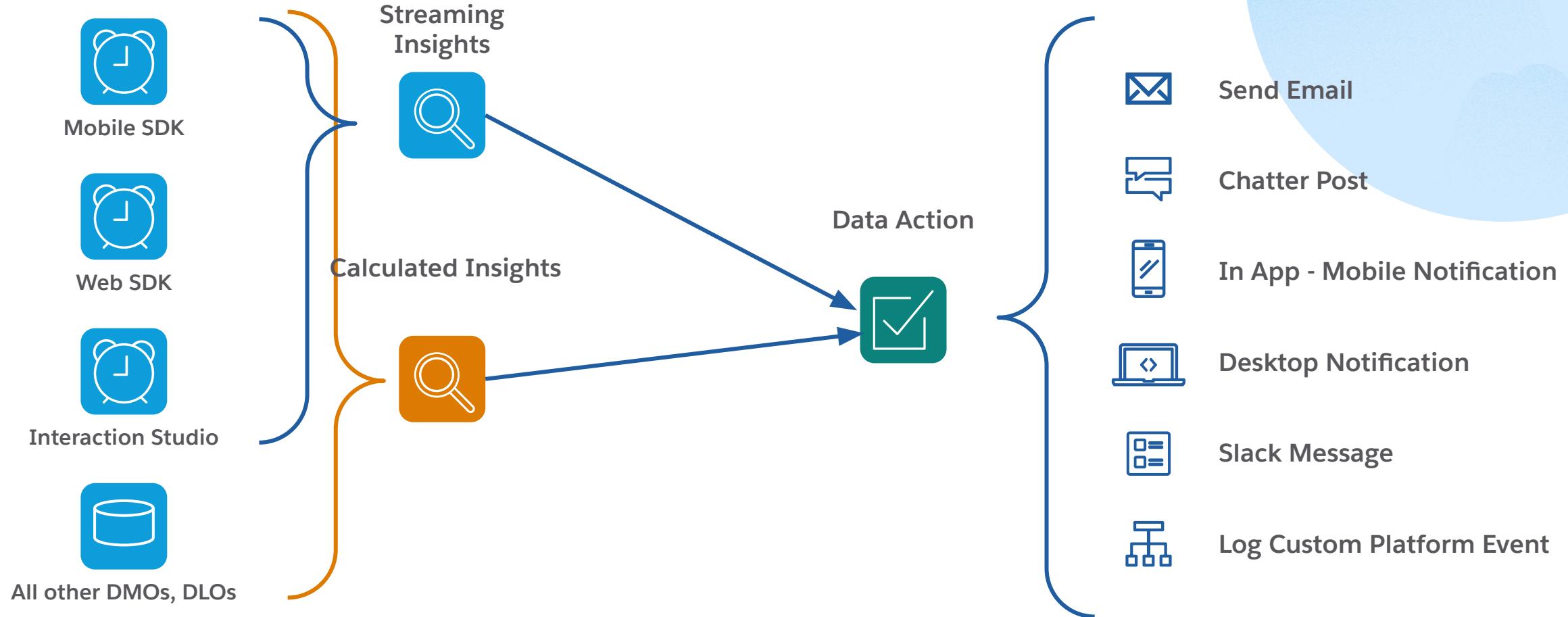
Streaming Insights : Example Results



start__c	end__c	customer_id__c	product__c	page_views__c
2024-02-08T12:00:00	2024-02-08T12:05:00	1	HK0012	5
2024-02-08T12:00:00	2024-02-08T12:05:00	2	JK0078	1
2024-02-08T12:05:00	2024-02-08T12:10:00	1	HK0012	2

Streaming insights are aggregating results and displaying them within each window of time. In this example, customer 1 looked at the same product a total of 7 times, 5 times within the first window, and 2 times within the second

Insights Triggering Data Actions



Metrics on Metrics



Reference one Calculated Insight from another

Reuse metrics for multiple scenarios
Break complex insights into smaller
logical steps
Only 3 levels of nesting possible

Syntax: <api_name>.<metric_name>



help article:
<https://sfdc.co/metricsonmetrics>



Metrics on Metrics



```
SELECT  
  
COUNT(ssot_EmailEngagement_dim.ssot_Id_c) as  
email_open_count_c,  
  
ssot_Individual_dim.ssot_Id_c as customer_id_c  
  
FROM  
  
ssot_Individual_dim  
  
JOIN ssot_EmailEngagement_dim  
  
on (ssot_Individual_dim.ssot_Id_c =  
ssot_EmailEngagement_dim.ssot_IndividualId_c)
```

Insight 1: Let's count all the email opens by individual

```
SELECT  
  
NTILE (50) over (ORDER BY SUM(  
NTO_Email_Open_Count_cio.email_open_count_c  
) desc) as  
  
customerengagementbuckets_c,  
  
NTO_Email_Open_Count_cio.customer_id_c as  
customer_id_c  
  
FROM  
  
NTO_Email_Open_Count_cio
```

Insight 2: Let's reference email opens by individual and
create 50 levels of customer engagement score



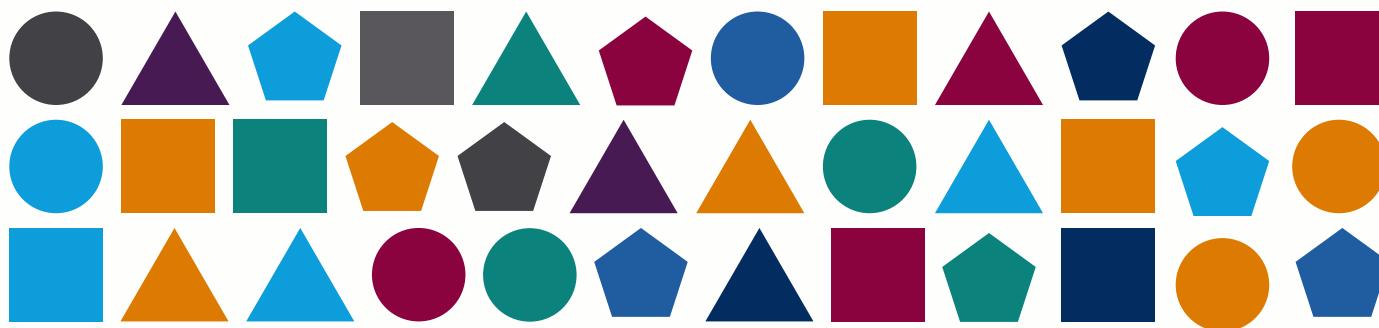
Segmentation



Segmentation Simplified



Segmentation is the process of selecting profiles that share common criteria.

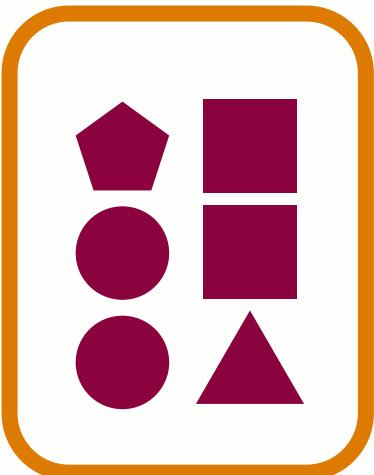
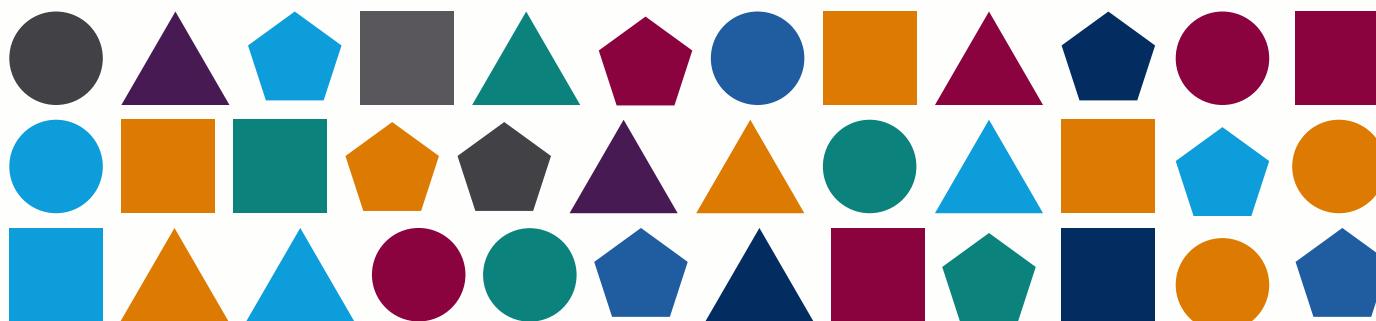


Segmentation Simplified



The data we bring into Data Cloud helps to **define** and **enrich** our profiles.

We can use that data to organize our profiles into groupings called **segments**.



Everyone Uses Segments



Marketers use Segments to help target profiles for customer journeys and more personalized experiences



Sales teams use Segments to help focus their efforts on prospects by propensity or stage, making them more efficient



Service teams use Segments to better focus on customer needs, resource allocation, and retention



Analysts use Segments to better understand customer behavior, trends, and identify opportunities for both growth and risk

Segmentation in Data Cloud

Customer benefits of using Data Cloud for segmentation.



- **Easy to Use.** Simple drag-and-drop interface; no code required.
- **Performance.** Fast segment counts enables marketers to test and learn.
- **Versatile.** Create segments on any ‘Profile’ data object like Individuals, Accounts, Leads, unified objects and custom objects.
- **Flexibility.** Create multi-layered segments via nesting segments, exclusion criteria, calculated insights and much more.

A screenshot of the Salesforce Data Cloud Segment builder interface. The top navigation bar includes the Data Cloud logo, search bar, and various menu items like Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Identity Resolutions, Profile Explorer, Segments, and More. The main area shows a segment named "TestSegment-Individual". It displays "Segment On Individual" and "Publish Schedule Don't refresh". A summary section shows "516" total population with "100% of 516 total population" excluded. Below this are sections for "Include" and "Exclude" criteria, specifically for "Account". An "Account" container path is defined as "Account.Sales Phone > Contact Point Phone.Party > Individual.Individual Id". Measurement criteria are set to "Count" at "At Least" level. An "Exclude" section shows a condition "Account Object Account Type Operator Is Equal To Value Type and select value...". A note at the bottom states: "The Event Date attributes for this container have a default date range of 24 months. Tell Me More".

Anatomy of a Segment



'Segment On':

Which object to create the segment with

'Publish Schedule':

How often the segment will be refreshed.

Segment TestSegment-Individual

Segment On Individual Publish Schedule Don't refresh Edit Properties Done

Attributes Segments Drag attributes or segments to the canvas

Segment Population 39 7% of 516 total population Excluded: 0 Segment Counts Segment Status Active Save

Include Exclude Include/Exclude Canvas Tabs

Direct Attributes (1) ^ Directly related to 'Segment On' DMO, e.g. 'Individual' attributes

Related Attributes (13) ^ Has a connected relationship with the 'Segment On' DMO

Note: only mapped data model attributes show up in segmentation

Segment Canvas

Individual • Birth Date Is After 1980-01-01

Account: Count At Least 1 Container-level criteria (Aggregation)

Contact Point Address • Country Is Equal To Australia Row-level criteria (Expressions)

Contact Point Address • State Province Is Equal To VIC Attribute → Operator → Value AND

Add another Attribute here

Nested AND/OR logic

Anatomy of a Segment (cont.) - Aggregate Types



With containers, you can aggregate your segment based on entity number attributes.

Aggregate Type	Requirements	Illustration
Count	As a marketer I want to segment for individuals who have made 2 or more purchases in our app or on our website in the past 3 months.	<pre>⋮ Sales Order: Count At Least 2 Purchase Order Date Last Number Of Months 3 Sales Channel Is In App, Website AND</pre>
Sum	As a marketer I want to segment for individuals who have purchased more than 4 of our products in our app or on our website in the past 3 months.	<pre>⋮ Sales Order: Sum Number of Items Is Greater Than 4 Purchase Order Date Last Number Of Months 3 Sales Channel Is In App, Website AND</pre>
Average	As a marketer I want to segment for individuals who have an average order size of more than 2 products for purchases in our app or on our website in the past 3 months.	<pre>⋮ Sales Order: Average Number of Items Is Greater Than 2 Purchase Order Date Last Number Of Months 3 Sales Channel Is In App, Website AND</pre>
Minimum	As a marketer I want to segment for individuals who have purchased more than \$100 in our app or on our website in the last 3 months.	<pre>⋮ Sales Order: Min Grand Total Amount Is Greater Than 100 Purchase Order Date Last Number Of Months 3 Sales Channel Is In App, Website AND</pre>
Maximum	As a marketer I want to segment for individuals who have spent more than \$10 for delivery/shipping on purchases in our app or on our website in the past 3 months.	<pre>⋮ Sales Order: Max Total Delivery Amount Is Greater Than 10 Purchase Order Date Last Number Of Months 3 Sales Channel Is In App, Website AND</pre>

Container Groupings



Adding expressions to the same container or to separate containers results in different segments.

Goal: Create a segment that includes every Individual that has opened the end of financial year email campaign.

1

Email Engagement: Count At Least 1

Email Engagement • Subject Line Text Is Equal To End of Financial Year Sale!

Email Engagement: Count At Least 1

Email Engagement • Engagement Channel Action Is Equal To Open

AND ▾

2

Email Engagement: Count At Least 1

Email Engagement • Subject Line Text Is Equal To End of Financial Year Sale!

Email Engagement • Engagement Channel Action Is Equal To Open

AND ▾

Question: Which of these two sets of segment criteria would result in meeting our goal?

Container Groupings



Adding expressions to the same container or to separate containers results in different segments.

Goal: Create a segment that includes every Individual that has opened the end of financial year email campaign.

1

Email Engagement: Count At Least 1
Email Engagement • Subject Line Text Is Equal To End of Financial Year Sale!

Email Engagement: Count At Least 1
Email Engagement • Engagement Channel Action Is Equal To Open

AND

Logic translation:

Include engagements
where 'Subject Line Text' equals 'End of Financial Year Sale'
AND
Include engagements where 'Email Engagement Action' equals
'Open'

- This segment would include all EOFY email engagements
(including those that were sent but haven't opened), and would also
include all open actions across every email campaign.

2

Email Engagement: Count At Least 1
Email Engagement • Subject Line Text Is Equal To End of Financial Year Sale!

Email Engagement: Count At Least 1
Email Engagement • Engagement Channel Action Is Equal To Open

AND

Logic translation:

Include records
where 'Subject Line Text' equals 'End of Financial Year Sale!' and 'Email
Engagement Action' equals 'Open' **on the same row**.

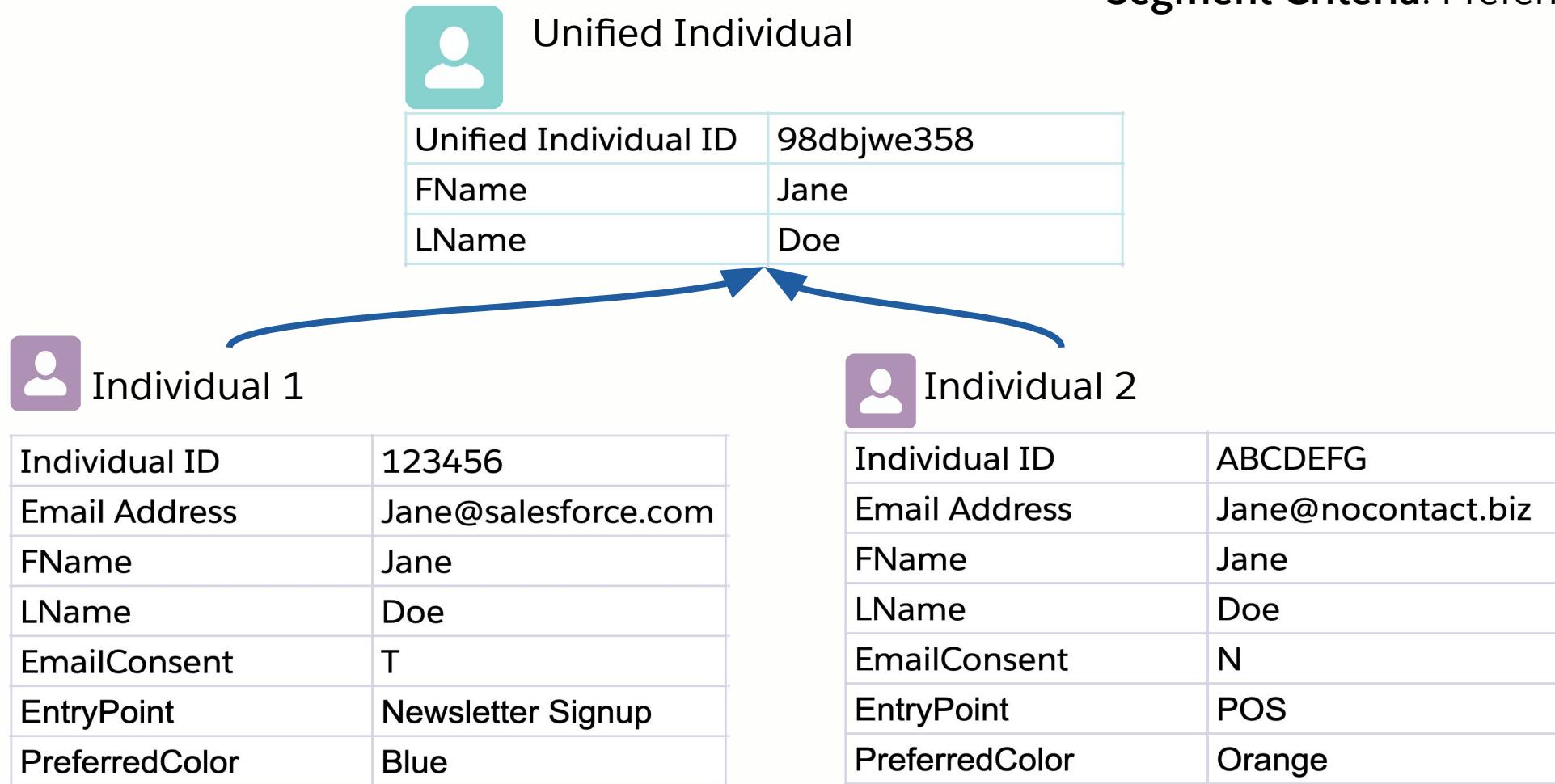
Segmentation

How it works



Segment on: Unified Individual

Segment Criteria: PreferredColor = Orange



Segmentation

How it works



Unified Individual

Unified Individual ID	98dbjwe358
FName	Jane
LName	Doe



Individual 1

Individual ID	123456
Email Address	Jane@salesforce.com
FName	Jane
LName	Doe
EmailConsent	T
EntryPoint	Newsletter Signup
PreferredColor	Blue



Individual 2

Individual ID	ABCDEFG
Email Address	Jane@nocontact.biz
FName	Jane
LName	Doe
EmailConsent	N
EntryPoint	POS
PreferredColor	Orange



Segment on: Unified Individual

Segment Criteria: PreferredColor = Orange

Result: This Unified Individual meets the criteria and joins the segment.

Standard Segment Timings



	Standard Publish	Rapid Publish
Supported activation targets	All targets	Cloud File Storage*, SFTP* & Marketing Cloud (*Summer 24')
Engagement data lookback window	2 years (based on Event Time attribute)	7 days (based on Event Time attribute)
Can be used in segment nesting?	Yes	No
Publish Frequencies	12 hrs, 24 hrs	1 hr, 4 hrs



Calculated Insights in Segments



Calculated Insights (CIs) can be used in segmentation to generate audiences based on complex metric calculations.

Example

An upcoming marketing campaign requires a segment of all customers where their lifetime order value in the glass category is above \$20.

CI is created that joins Unified Individuals and order data, and calculates a new measure called '*LTV*' that sums together order value across all order records that include glass products.

Marketers can then drag the metric onto the canvas and create the campaign segment.

Note: In order for a CI to appear in segmentation, it has to reference the 'Segment On' object and the 'Segment On' primary key attribute must be a dimension.

The screenshot shows the Salesforce Segment Builder interface. On the left, a sidebar lists various segments and calculated insights. A purple oval highlights the 'Calculated Insights:' section, which contains 'LTV (1)'. This segment is then selected and shown in the main panel. The main panel displays the segment configuration for 'TotalSpendUI', which is set to 'Segment On Unified Individual'. It shows a count of 18,336,739 and a population of 1. Below this, the 'Where' clause is defined with two conditions: 'LTV_c Is Greater Than 20' and 'ProductCategory_c Contains "Glass"'. The right side of the interface shows the resulting segment summary, which includes the count, population, and a detailed breakdown of the 'LTV' calculation.

Nested Segments



Nested segments enables marketers to re-use templated criteria across multiple segments to save time and to maintain consistency.

Example: Create a new segment for an upcoming womenswear email send.

A screenshot of the Segment Population screen in a marketing platform. It shows a summary card with 'Segment Population' at 5,649,019 (34% of total population) and 'Excluded: 0'. Below this, there are sections for 'Include' and 'Exclude' criteria. Under 'Include', there are two items: 'Gender Is In F, Female' and 'Category_Preference Is Equal To Womens'. A button 'Add another Attribute here' is visible at the bottom right of the criteria area.

A screenshot of the Segment Population screen showing an 'Include' section. It contains a single item: 'Women - Implicit & Explicit'. Below it, under 'Nested Publish Behavior', is the note 'Use Last Published Membership'. At the bottom, there is another item: 'Channel_Preference Is Equal To Email'. The interface includes tabs for 'Include' and 'Exclude', and a logical operator 'AND' is visible on the right.

Inner Segment:

Includes all customers that are interested in womenswear (i.e. gender identity is female, or their preferred category is womenswear).

Outer Segment:

Create a new segment and drag in the womenswear segment, then add criteria specific to that campaign (such as email consent).

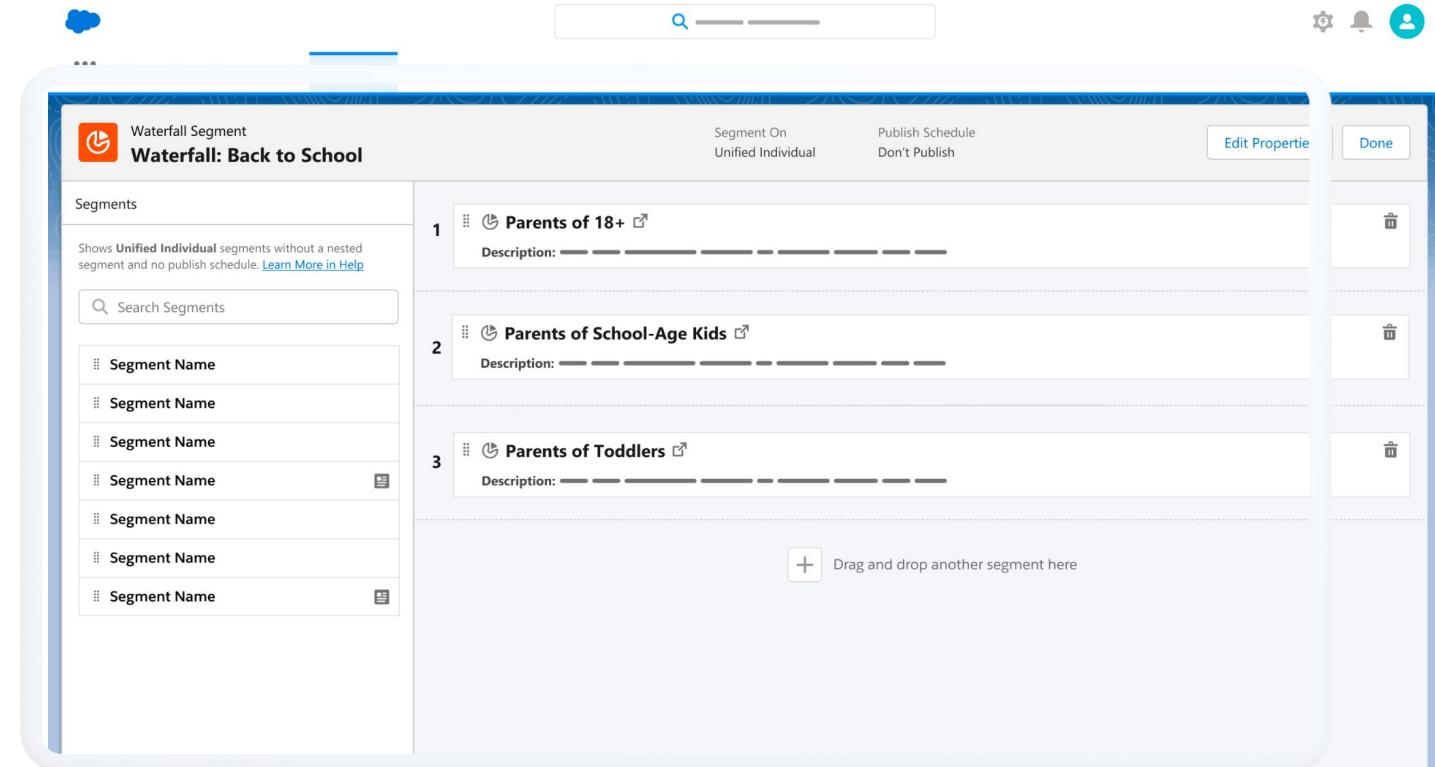
Note: 'Segment On' entity has to be the same for both inner and outer segments.

Waterfall Segmentation

Mutually exclusive segments

Define and visualize an audience solution
that marketers can use for Campaign
Prioritization:

Waterfall Segmentation refers to a specific
method of setting up a prioritized list of
audience segments where an individual
can exist in only one of the segments.



Segment Membership as Data Model Objects

Analyse or validate segment membership

For every profile DMO that has published segments, two DMOs are created that track segment membership:

1. 'Segment Membership - Latest'

(Profiles included in most recent segment publish)

2. 'Segment Membership - History'

(Profiles included in previous segment publishes)

These DMOs can be used in a number of ways:

- Test segment membership via Data Explorer to ensure results are correct
- Analyse segment trends using Tableau
- Reference a customer's segment membership externally via Calculated Insights or via API

The screenshot shows a Data Explorer interface with a sidebar and a main content area. The sidebar includes 'Latest Posts' and a search bar. The main content area displays a table titled 'Activation Name' with rows for 'Running_Loyalists_N...' and 'Hulu'. Below this is a 'Publish History' section with a note about activation counts. A table lists activations by platform (SFMC) and activation name, showing details like count, activation date, and status. At the bottom, a callout box highlights 'Segment membership tables' with three entries: 'Unified Individual - Segment Membership - Latest', 'Unified Individual - Segment Membership - History', and 'Unified Individual - Segment Membership - Profiles'. To the right, there is a social media feed with posts from 'James Peterson' and 'Jina Evans'.

Activation Name	Activatio	Activate	Contact I	Activatio
Running_Loyalists_N...	Hulu	Unified Individual		

Publish History

Common reasons Activation Count is lower than Segment Count include duplicate unified profiles and missing contact points.

Activation Name ↓	Platform	Segment	Activation	Publish End Time	Publish Type	Publish Status
AMER-Commerce	SFMC		Manual	...
AMER-Commerce	SFMC	1,208,614	1,000,159	07/20/2021, 12:30 AM	Scheduled	Success
AMER-Commerce	SFMC	1,451,516	1,241,518	07/19/2021, 1:30 PM	Scheduled	Success
AMER-Commerce	SFMC	1,104,501	958,261		Scheduled	Error
AMER-Commerce	SFMC	1,002,562	890,462	07/17/2021, 12:30 PM	Scheduled	Success

Segment membership tables:
Unified Individual - Segment Membership - Latest
Unified Individual - Segment Membership - History
Unified Individual - Segment Membership - Profiles

Latest Posts

Search this feed...

James Peterson 40m ago

Do you think we should add any more folks to this segment?

Like Comment Share

Cameron, Andrea, and 14 others liked this post

More comments 1 of 5

Jina Evans 35 mins ago

Yes, please. We need to also include Females over 25 years of age. Hit me up for questions.

Like · 35 mins ago

Value Suggestion



By default, when segmenting with text attributes the end user types in values to search for. This can result in incorrect segment criteria/counts.

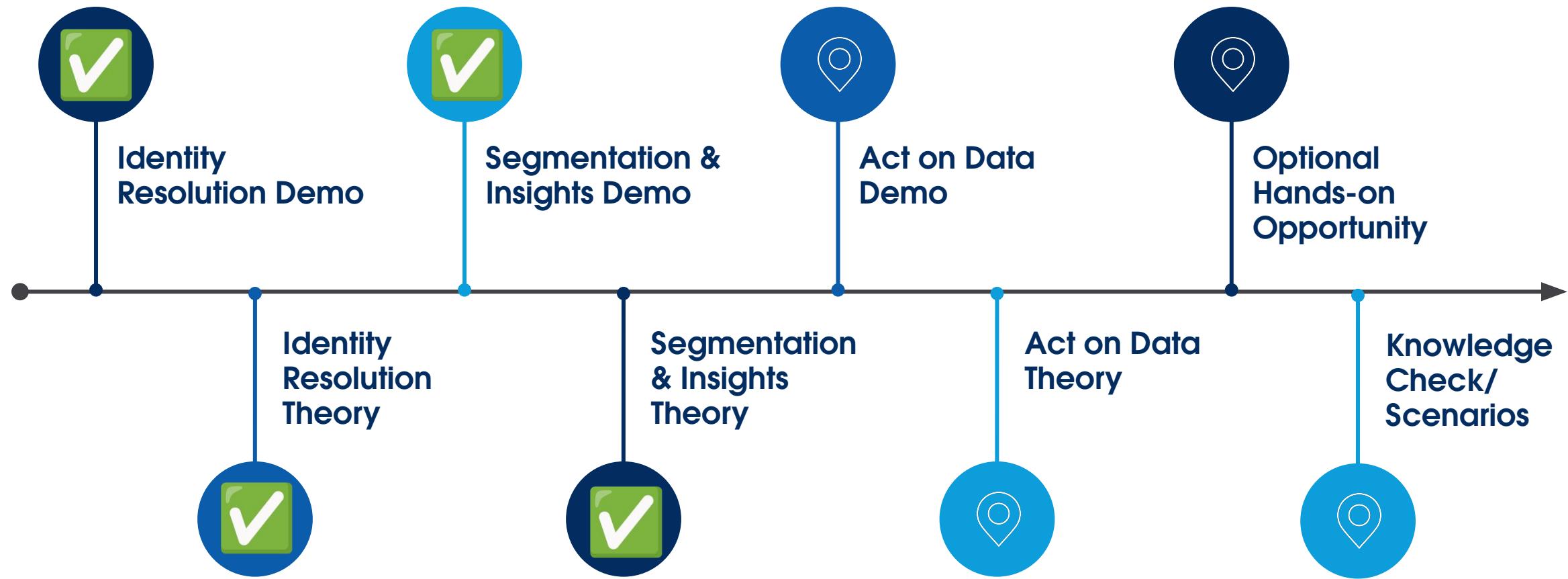
Enabling Value Suggestion on a text attribute enables a dropdown list of values for end users to make segmentation easier and to minimise input errors.

Considerations

- Once enabled for an attribute, takes up to 24 hours to generate the suggested value list.
- Maximum 1,000 values displayed for an attribute. If the limit is reached, list will show the most frequently occurring 1,000 values.
- Values more than 255 chars aren't suggested, but can be searched for
- Maximum 500 Value Suggestion attributes can be enabled per Data Cloud org

The screenshot shows the 'Account' segment configuration screen. At the top, the 'Container Path' is set to 'Account.Sales Phone > Contact Point Phone.Party > Individual.Individual Id'. Below this, the 'Measurement' is set to 'Count', 'Operator' to 'At Least', and the 'Value' is '1'. In the 'Attribute' section, 'Account' is selected as the object and 'Account Type' is the attribute. The 'Operator' is set to 'Is Equal To' and the 'Value' field contains the placeholder 'Type and select' with a magnifying glass icon. A red box highlights this dropdown. A list of account types is shown: Enterprise, Mid-Market, Other, Partner, and Small Business. The 'Done' button is visible at the bottom right of the dropdown.

What have we accomplished today?





Act on Data



“Act on Data” your Data

Different ways to Act on & get Value from your Data

Implementation Tip

Align your choice to the Use Case

Analytics & Insights

- Data Cloud Report & Dashboards
- Insights
- Data Sharing
 - Snowflake
 - Databricks
 - Redshift
- Analytics
 - Tableau
 - CRM Analytics

Activate

- Segmentation
- Activation
- Data Action
 - Platform Event
 - Flows
- CRM Enrichments
 - Copy Fields
- Data Cloud Triggered Flows

ML - Deliver Predictions

- Einstein Studio Model Builder (Low Code)
- BYOM (Build your own Model)
 - Amazon Sagemaker
 - Google Vertex

Consume Data Cloud

- LWC
 - Standard Components
- API
 - Query API
 - Profile API
 - Data Graphs
- CRM Enrichments
 - Related List



“Act on Data” your Data



Different ways to Act on & get Value from your Data

Analytics & Insights

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- API
 - Query API
 - Profile API
 - Data Graphs
- CRM Enrichments
 - Related List



Activation



Data Cloud Activation Simplified

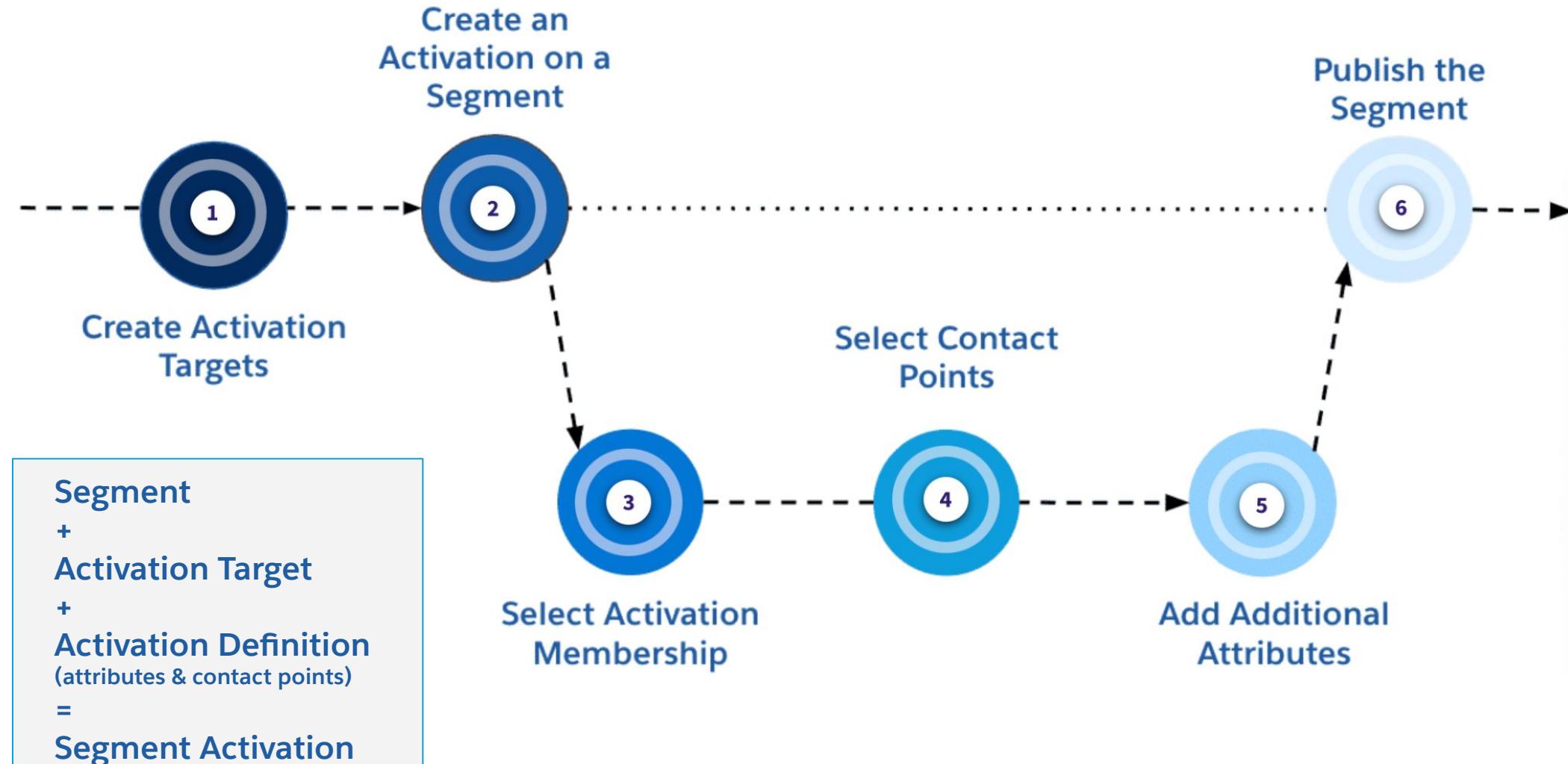


Activation is the process of delivering a **payload of segment members** and their **supporting attributes** to a connected **Activation Target**.



Activation Process

How does a segment reach an activation target?





Activation Targets



Activation Target



New Activation Target

ADVERTISEMENT TARGETS

All (7) Advertising (5) Publishing (0) Analytics (0) Marketing (0) Technology (2)



The Trade Desk
Audience Segment Activation Platform



LiveRamp Distribution

Distribute and activate your audiences across 500+ publishers to run omnichannel advertising without sending customer PII downstream with LiveRamp



Criteo

Criteo powers trusted and impactful advertising to bring richer experiences to every consumer across the open internet.



Google Ads
Create activation targets using a connected Google Ads account.



Meta (Facebook)

Create activation targets using a connected Meta account.



Amazon Ads

Activate audiences to Amazon Ads for use in Amazon DSP campaigns and Amazon Marketing Cloud reporting.



LinkedIn Advertising
Create activation targets using a connected LinkedIn account.

File Storage



S3



Secure File Transfer (SFTP)

Create activation targets to export files to an SFTP server.

Cancel

Next



Activation Targets

Locations where a segment's data can be sent during activation



Cloud File Storage (GCS, S3, Azure)

- Requires access key and secret key, and proper bucket credentials to create folders & upload files

Marketing Cloud

- Business Units can be added/removed
- Activations to Shared Data Extensions

Data Cloud

- Activations can be published back into Data Cloud DMOs for use with Flow, API-integrations, LWCs, etc.

External Activation Platform

- Google Ads
- Meta
- LinkedIn
- AppExchange

B2C Commerce Cloud

- Automatically created when instance connected to Data Cloud

Personalization (Interaction Studio)

- Automatically created when instance connected to Data Cloud



Activation



Edit Activation

View, edit, or delete attributes for your activation.

Attributes Included

Unified Individual (5)

Attribute	Preferred Attribute Name	Dimensions
1 Unified Individual Id	Customer Number	Not Available
2 First Name		Not Available
3 RFMCombined__c	RFM Combined Score	Not Available
4 avgpurchasevalue__c	Average Purchase Value	Add...
5 FirstStorePurchasedFrom__c	First Purchase Store	Add...

Loyalty Program Member (1)

Max. # of Attribute Values: 1 Sort By: Loyalty Program Member Id Descending

Attribute	Preferred Attribute Name	Dimensions
1 Membership Number	Rewards Program Id	Not Available

Loyalty Member Currency (1)

Max. # of Attribute Values Sort By

Activation Summary

default
Default data space where all the current DLOs are made members

Dormant Shopper with High Loyalty Balance ↗
Segment On: Unified Individual
Publish Schedule: ⚠️ Don't refresh

Audiences_RAVG_Retail ↗
Platform: Amazon S3
Bucket Name: arcdp01-dev

Attributes Included (8)

1. Customer Number
2. First Name
3. Rewards Program Id
4. Points Balance
5. RFM Combined Score ↗
6. Average Purchase Value ↗
7. First Purchase Store ↗
8. Email Address

Previous Next



Building Activations

Additional Attributes

Up to 100 of the following types of attributes can be added to an activation.

Attributes can be:

- The Activation Membership object
- From any object in the DMO if there's a path to that object from the Activated On object, and all the relationships along that path are either 1:1 or N:1
- Calculated Insights

Fields used in activation can be updated with a preferred attribute name to align the output with the activation target requirements.

Tip

Understand how you can modify attribute names during activation



Edit Activation

View, edit, or delete attributes for your activation.

Attributes Included

Add Attributes

Activation Summary

- Workshop
- Unified Segment 1
- Data Cloud SCPPE SFMC

Sales Order (5)

Attribute	Preferred Attribute Name	Dimensions
1 Sales Store	Not Available	
2 Sales Order Status	Not Available	
3 Grand Total Amount	Not Available	
4 Order Start Date	Not Available	
5 Sales Order Id	Not Available	

Unified Individual (5)

Attribute	Preferred Attribute Name	Dimensions
1		
2		
3		
4		
5		

Attributes Included (11)

1. Sales Store
2. Sales Order Status
3. Grand Total Amount
4. UUID
5. First Name
6. Last Name
7. Order Start Date

Previous

Activations & Contact Point Source Priority

How the rules work, and what to expect

Behavior for selecting a Contact Point

1. Source Priority / Type
2. Einstein Engagement Score
3. Lowest Numerical Id

Contact Point Party Id = Subscriber Key
Contact Point Email Address = Email



Contact Point Filtering:

<https://www.salesforceblogger.com/2024/08/26/contact-point-filtering-the-missing-piece-in-your-consent-aware-data-strategy/>



Select contact points for your activation ⓘ

⚠ Only contact points mapped to the Activation Membership entity, can be selected [More Info](#)

Priority	Source	Email Type ⓘ
1	Salesforce_00DDo000001B0tD	Any
2	S3_eCommerce_RAVG_Retail	Any
3	SFMC523016329	Any

Hide advanced options ^

Phone (SMS) [Select](#)

Adds the Phone Number and Country Code as attributes for your activation

Related Attributes

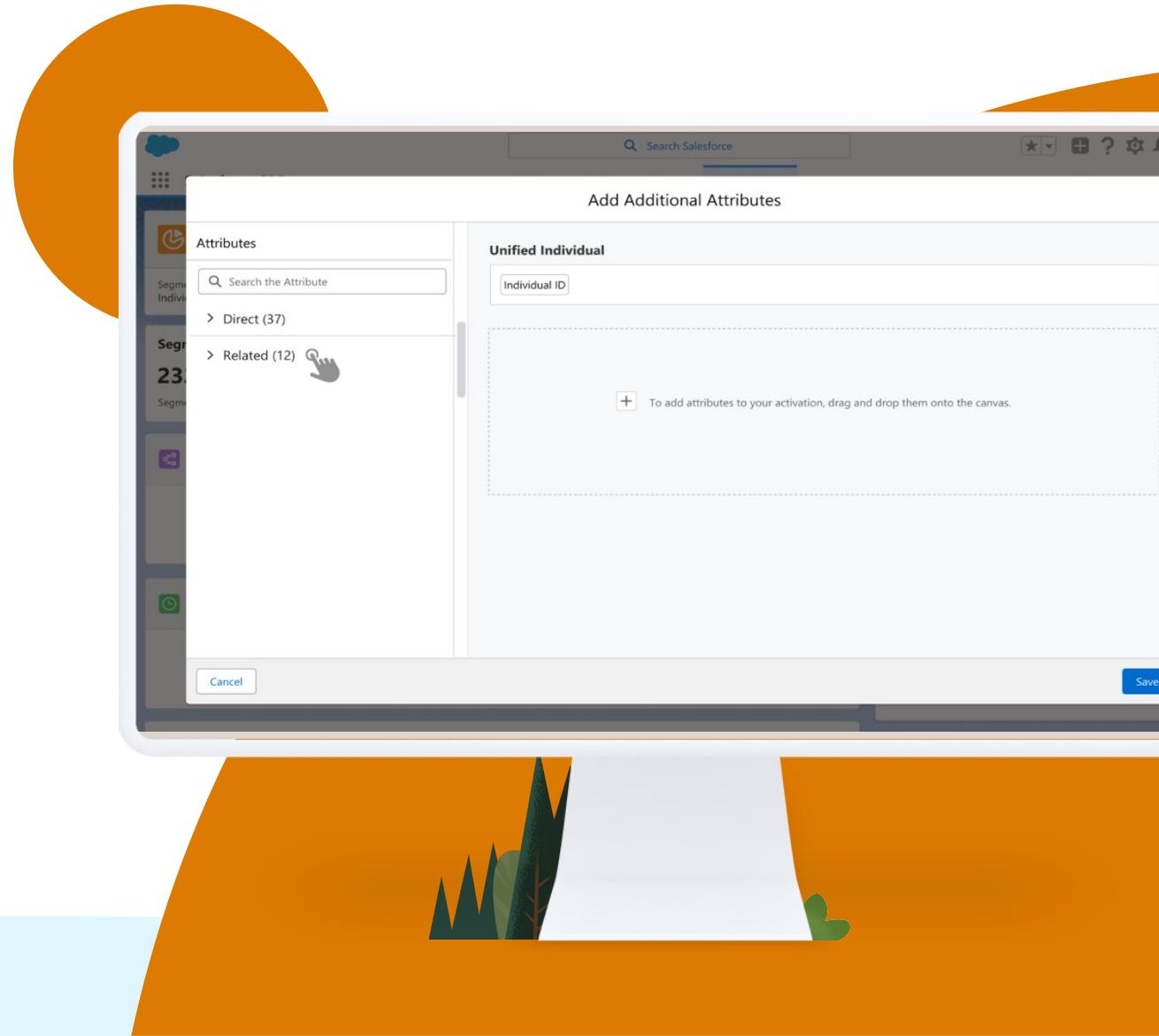


Expand personalization capabilities for messaging and journeys

- Choose direct (e.g., name) and one-to-many related attributes (e.g., loyalty status and products purchased) during activation to supercharge messaging content

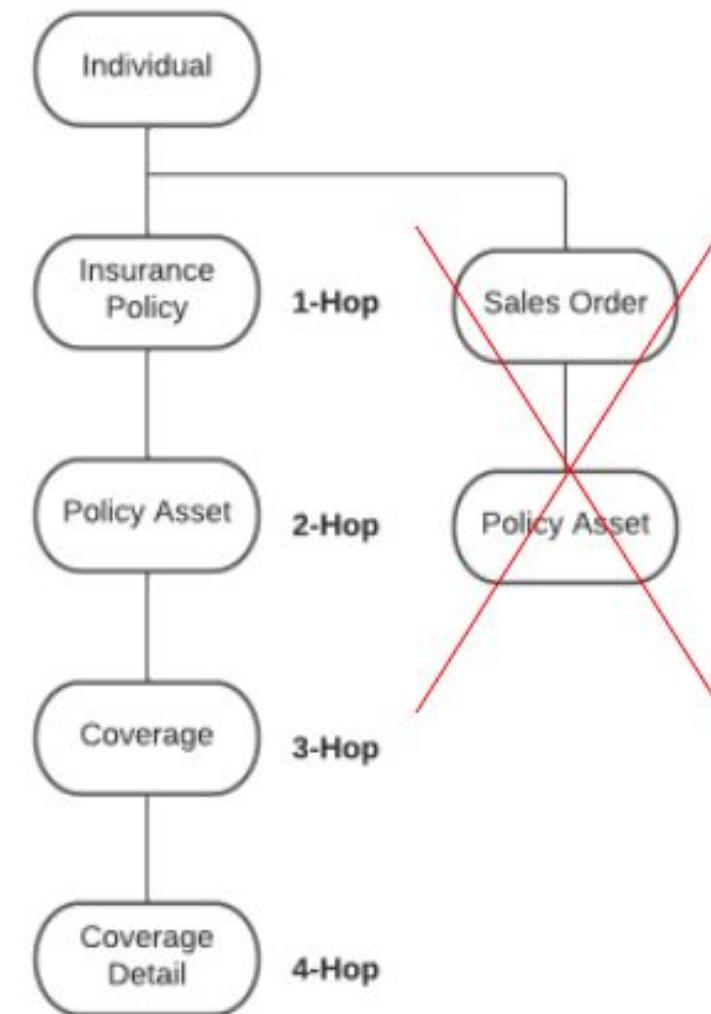
Unlock cross-cloud data

- Enable additional use cases using related attributes from marketing and non-marketing systems



Related Attributes Activation

- A. Users can only select attributes following one path. When selected, only attributes from a child DMO can be included.
- B. If there are multiple paths available from the DMO to the Activate On membership, selecting the correct one is important.
- C. Once you have selected an attribute via a path, other paths will be disabled in the ALM.
- D. The DMO that you've selected the attribute from is important and limits what filters you can apply.



Related Attribute Activation Considerations



- Can only use for Activations to MC, and Cloud File Storage
- Mindful of Guardrails & limits
 - Choose up to 30 activations with related attributes
 - Segment must contain less than 10 million records
 - You can traverse upto 4 hops for related objects
 - 90-day lookback window (for engagement-based related attributes)
- Filter on Related Attributes
 - Different than Segmentation Filters
 - Segmentation filters to find users who qualify for the segment
 - Activation filters to find attributes for message personalization
- Using Related Attributes
 - Related Attributes are stored as JSON
 - Within MC, use SSJS, GTL, or Ampscript to parse for message personalization
 - For Journey Decisioning, split data to bring data into your Contact Model



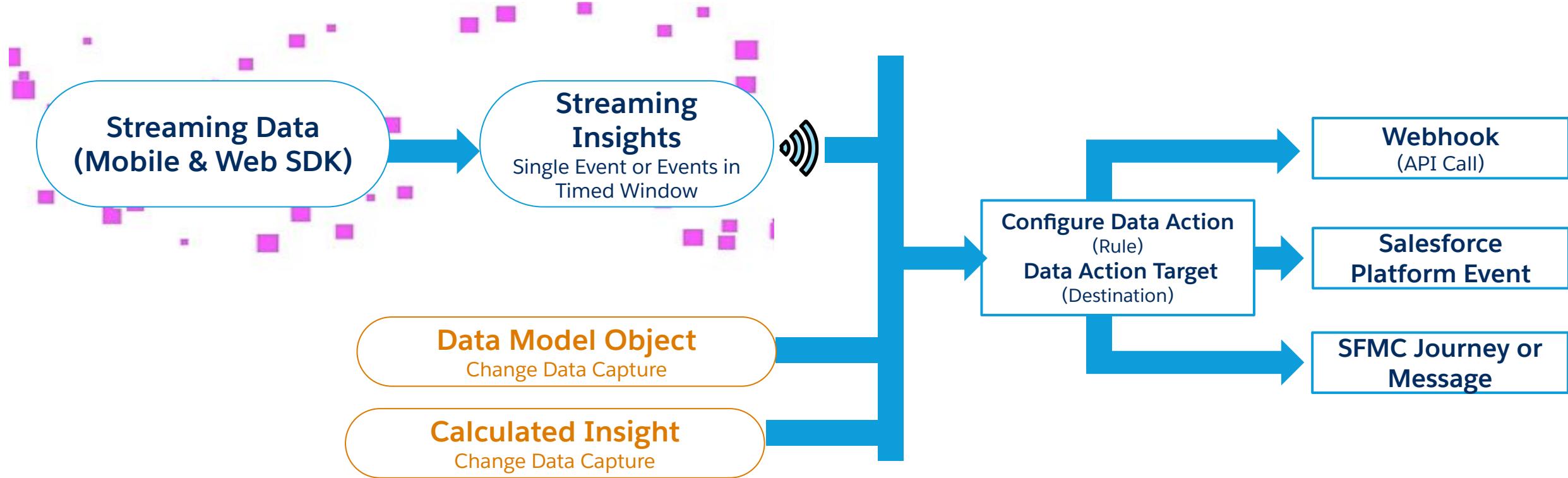
Data Actions



Data Actions



Respond to customer actions and events in Real-time/Near Real-time



Data Action Examples



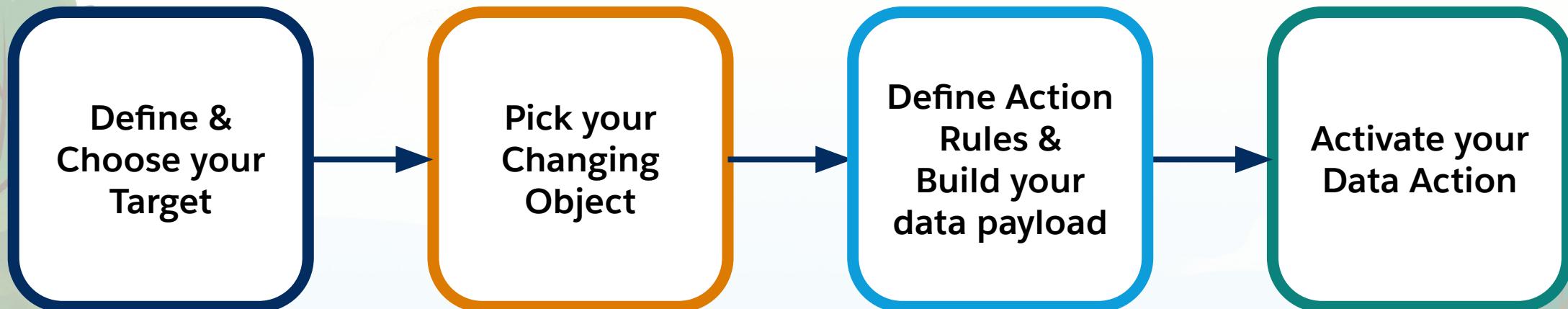
Here are a few examples of use cases enabled by data actions.

- **Customer Tier Change:** A customer's recent purchase increases their customer lifetime value to a new service level which sends a platform event to CRM, updating their status
- **Welcome Journey:** A customer completes their first purchase which enters them into a welcome journey, explaining warranty information and additional services
- **Financial services:** A customer's average monthly deposits have increased significantly year over year, which enters them into a journey explaining investment options
- **Higher Education:** A predictive model flags a student's performance at risk for dropout, and a platform event opens a case to investigate & remediate the potential issues
- **Location-based engagement:** A customer checks into a hotel. You can send the customer a journey with prompts to visit the hotel bar or check out luxury vacations and activities.

Configuring Data Actions



Data actions can easily be configured with just a few clicks.



Configuring Data Actions



Define & Choose your Target

Pick your Changing Object

Define Action Rules & Build your data payload

Activate your Data Action

- Marketing Cloud
- CRM Platform
- Event
- Webhook

The screenshot shows the Salesforce Data Actions interface with a "New Action" dialog open. The top navigation bar includes "Data Lake Objects", "Data Model", "Profile Explorer", "Data Explorer", "Identity Resolutions", "Calculated Insights", "Data Action Targets", "Data Actions", and "Segments". The "Data Actions" tab is selected.

The dialog has a title "New Action" and a section titled "Data Action Target" with the sub-instruction "Choose where to send the payload when the change data event triggers." It lists three targets:

Data Action Target Name	Target Type	Created By	Modified Date
Marketing Cloud	Marketing Cloud	CDP Admin	Jun 12, 2023
SFMC Email	Marketing Cloud	CDP Admin	Aug 21, 2024
Unified_Individual_TST1_default_IC1PHAZmfg	Salesforce Platform Event	CDP Admin	Jun 03, 2024

At the bottom of the dialog are "Cancel", "Next", and a progress bar.

Configuring Data Actions



Define & Choose your Target

Pick your Changing Object

Define Action Rules & Build your data payload

Activate your Data Action

Select a primary and related object for including related attributes. DMOs & Calculated Insights can be chosen.

New Action

Salesforce Marketing Cloud targets will fail to execute if "Subscriber Key" fields are missing on the selected object.

* Data Space
default

* Object Type
Data Model Object

* Primary Object
Individual

Related Object (Optional)
My_Second_Great_Segment_Graph

* Related Object Path
Individual.Individual Id > Individual.Individual Id > Unified Link Individual > Unified Individual > Promotional...

* Subscriber Key
Individual Id

Summary

Data Action Target
Marketing Cloud

Data Space
default

Primary Object
Individual

Related Object
My_Second_Great_Segment_Graph

Related Object Path
Individual.Individual Id > Individual.Individual Id > Unified Link Individual > Unified Individual > Promotional...

Back Next

Configuring Data Actions



Define & Choose your Target

Pick your Changing Object

Define Action Rules & Build your data payload

Activate your Data Action

Configure specific types of events to listen for and what conditions in which an action should be triggered.

New Action

Event and Action Rules

Event Rules ⓘ
Select record actions that trigger the action.

Record Created
 Record Updated
 Record Deleted

Action Rules

* Publish data when:
All Conditions are Met (AND)

* Object: Individual
* Attribute: Select an attribute
* Operator: Select an operator
* Value: Search for a value
+ Add Condition

Trigger Data Action for Updated Records ⓘ
 (Default) Every time a record update meets these conditions
 Only the first time a record update meets these conditions

Summary

Data Action Target: Marketing Cloud

Data Space: default

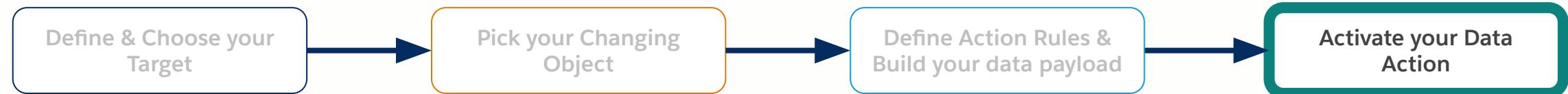
Primary Object: Individual

Related Object: My_Second_Great_Segment_Graph

Related Object Path: Individual.Individual Id > Individual.Individual Id > Unified Link > Individual > Unified Individual > Promotional_Campaign_Audiences

Back Next

Configuring Data Actions



The screenshot shows the 'New Action' configuration screen in the Salesforce Data Action interface. The top navigation bar includes links for Data Lake Objects, Data Model, Profile Explorer, Data Explorer, Identity Resolutions, Calculated Insights, Data Action Targets, Data Actions, and Segments. The main form is titled 'New Action' and contains sections for 'Properties' and 'Summary'. The 'Properties' section includes fields for 'Action Name' (with a person icon), 'Action API Name' (with a person icon), and 'Description'. The 'Summary' section displays the following configuration details:

- Data Action Target:** Marketing Cloud (selected)
- Data Space:** default
- Primary Object:** Individual (Data Model Object)
- Related Object:** My_Second_Great_Segment_Graph (Data Graph)
- Related Object Path:** Individual.Individual Id > Individual.Individual Id > Unified Link > Individual > Unified Individual > Promotional_Campaign_Audiences

At the bottom of the screen, there are 'Back' and 'Save and Publish' buttons.

Give your great new Data Action a name and description and Publish that shiny new data action!

Let's Compare: Activation and Data Actions

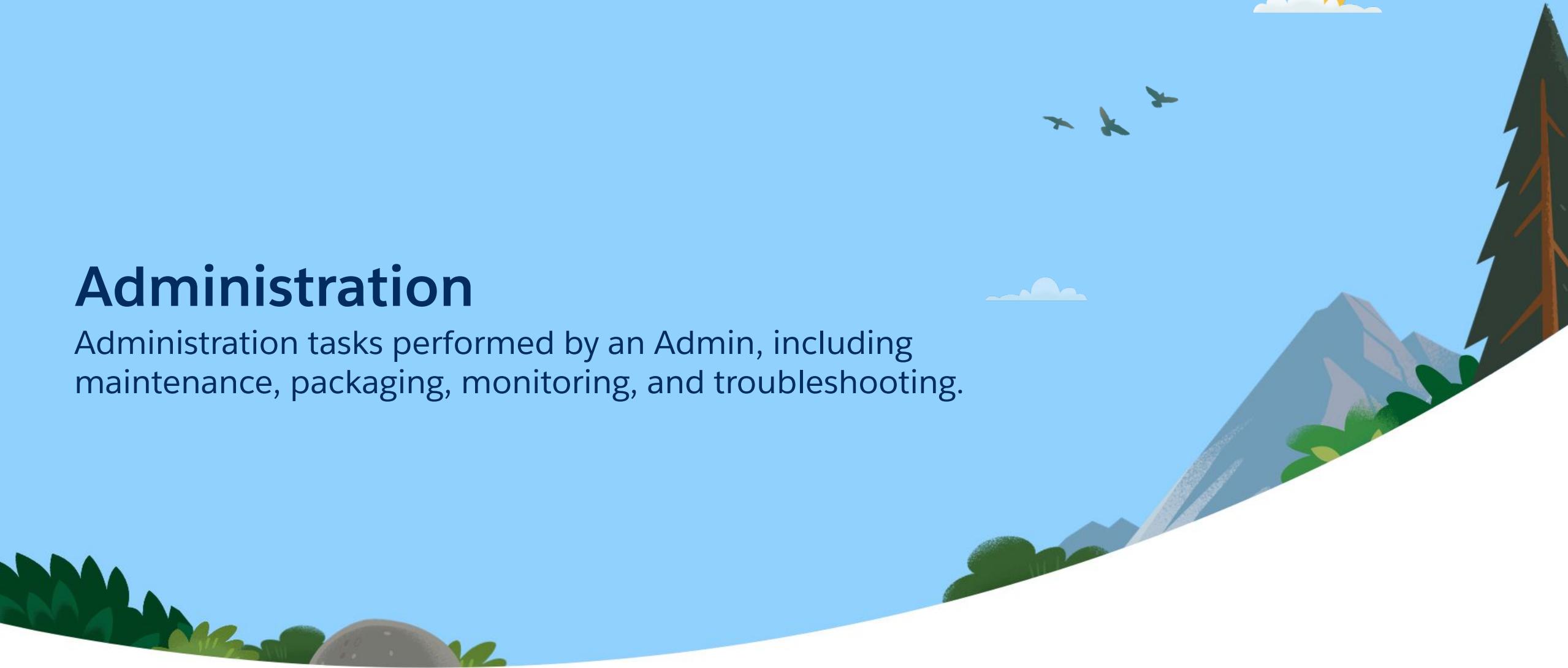


	Activation	Data Action
Typical Users	Marketer	Data aware specialist / architects and data engineers
Usage	Activation is the process that publishes a segment to activation platforms with relevant profile attributes and metrics.	Data Action is the process that sends alerts/events to targets such as Salesforce core or webhook based on <i>Streaming Insights, CDC & Engagement Data</i>
Timing	Scheduled Activation of large segments with millions of profiles	Key focus on <i>Event-Driven automations and Change Capture</i>
Payload Context	Activation sends Data Cloud IDs to activation targets, decorates the audience with contact points, appends attributes and insights etc.	Data Actions trigger smaller payloads based on changing data and do not push historical data or expand substantially with additional context
Target	Activation Targets include SFMC, SFCC, Cloud File Storage, SFTP, Data Cloud DMO, External Ad Platforms	Data Action Targets includes Salesforce Core, Webhook, SFMC



Administration

Administration tasks performed by an Admin, including maintenance, packaging, monitoring, and troubleshooting.



“

*As a Data Cloud Administrator, I want to
create administrative reports and
dashboards on my Data Cloud data*

Data Cloud Reports

Different flavors of Reporting on top of Data Cloud



Analytics Reports & Dashboards

(on top of Data Cloud Data)

- Creating reports/dashboards for data managed by Data Cloud (DLOs, DMOs, CIs)
(home org only)
- Use tools such as Tableau, CRM Analytics, Marketing Intelligence
- Use your own BI tool via the JDBC driver

Administrator Reports & Dashboards

(on top of Data Cloud Metadata - configurations)

- Create CRM Reports & Dashboards on top of Data Cloud Metadata
- Use Lighting Report Builder on following objects
 - Data Stream, Segment, Activation Target, Identity Resolution

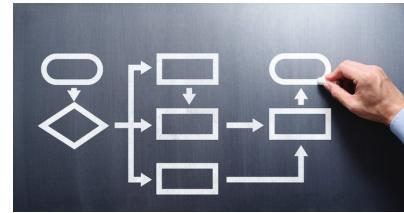
“

As a Data Cloud Administrator, I want to orchestrate and control when my Processes run (Insights, Identity Resolution, Segmentation) based on my business needs

Workflow Orchestration

Enable Data Cloud Admins to define more granular, connected workflows with more flexible execution schedules

Key Challenges / Considerations



Order of operations
for **schedule-based**
processes



Use Cases

Reduce platform prep time for large data loads by chaining **Ingestion** / **Batch Transforms** / **Identity Resolution** / **Calculated Insights** together



Credit consumption
& timing processes
around **use cases**



Refresh and process data at **precise intervals** to match the rate of the **use case** or the rate at which data is **available**

“

As a Data Cloud Administrator, I want to monitor my instance and quickly react when I have an error

Error Notifications

How to Setup a Flow Notification

- Open flow builder:
 - From Setup, enter Flows in the Quick Find box, select Flows, and then click New Flow.
- Select the flow type of “Record-triggered flow” and then click create
- Configure start
- For activation errors - the object you need to select is Activation (MarketSegmentActivation).
 - If you want to be more granular and want error notifications on a particular activation you can set the entry condition to include that field. In our example we are selecting all activation errors
 - Under Condition Requirements set LastPublishStatus Contains ERROR
LastPublishedDate Is Changed True

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object: Activation

Could be any other Object

Configure Trigger

* Trigger the Flow When:

A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
LastPublishStatus	Contains	ERROR
AND	LastPublishedDate	Is Changed
True X		

+ Add Condition

When to Run the Flow for Updated Records

Every time a record is updated and meets the condition requirements
 Only when a record is updated to meet the condition requirements

Because you selected the Is Changed operator in a condition, you can't change when to run the flow for updated records. To select an option for when to run the flow, remove all Is Changed operators from the conditions.

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Done

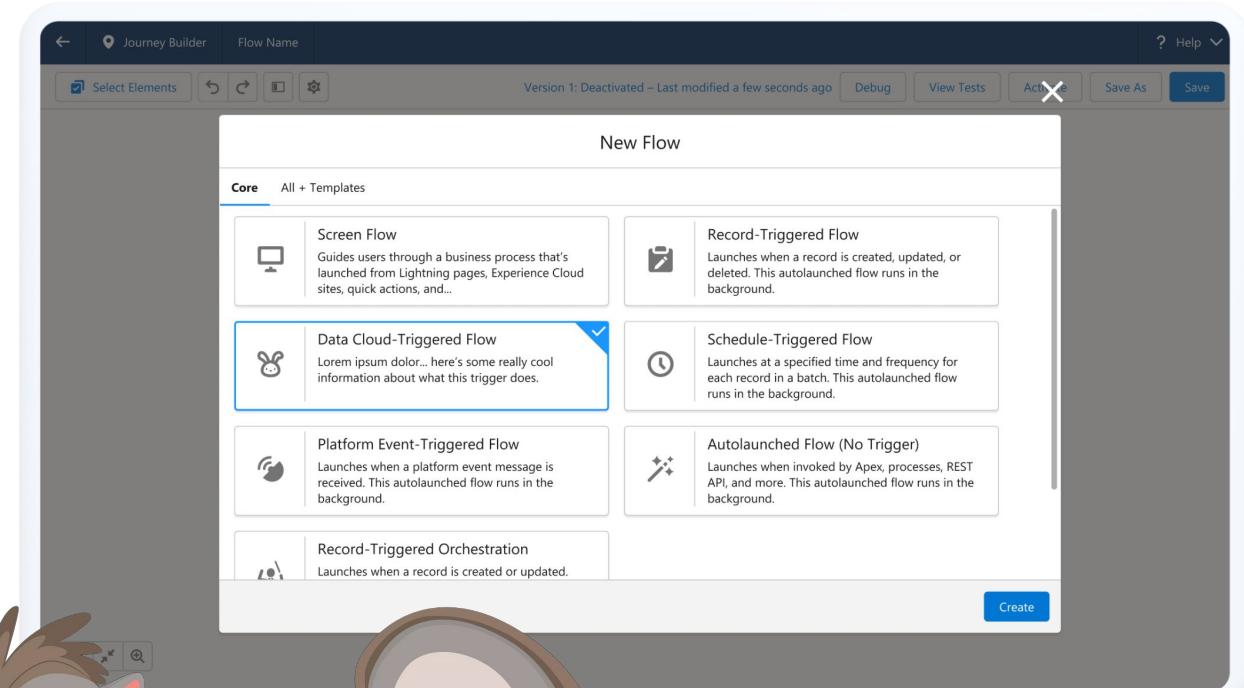
Data Cloud Triggered Flows

Automate across your entire Enterprise with unified data to deliver cohesive customer experiences



Access Data Cloud Data Spaces and Data Model Objects directly in Flow Builder

- **Automate business processes using any data from across your enterprise using clicks, not code in Flow Builder.** Break through data silo barriers and enable automation off the full Customer 360 (Unified Individual) assembled in Data Cloud.
- **Automate processes that can react in near-real-time to profile changes or engagement data using platform tools that sales, service, and platform builders are already familiar with, without the need for any custom development.**



“

*As a Data Cloud Administrator, I want to
package my configurations*

Data Cloud Packaging

Packaging Options for Data Cloud



Packaging (1st and 2nd Gen)

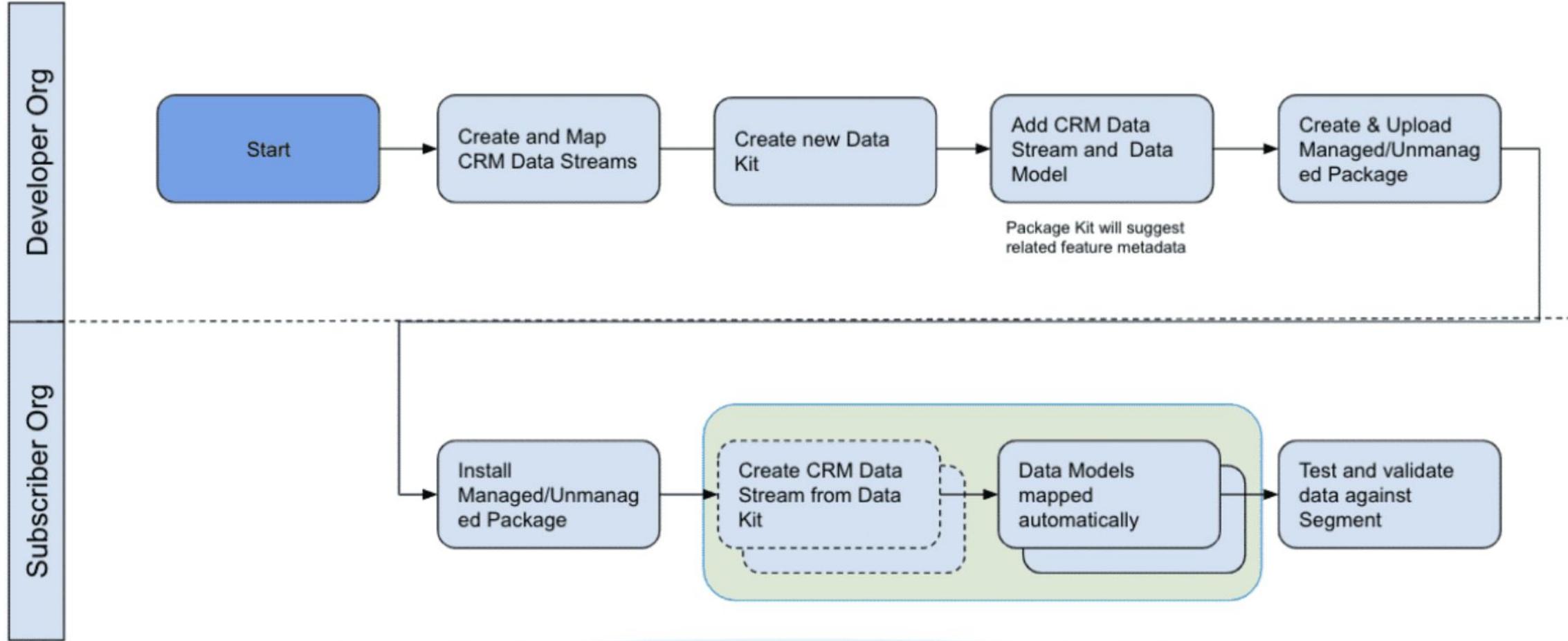
- Data Cloud is built on top of Salesforce and uses the same packaging framework
- Supports packaging of Data Streams, Data Models, Calculated Insights, Data Shares

Data Kits

(on top of Data Cloud Metadata - configurations)

- More efficient way to package Data Cloud Configuration
- Wraps all the independently packageable Data Cloud metadata

Data Kit Flow & Lifecycle





Data Cloud: Topology

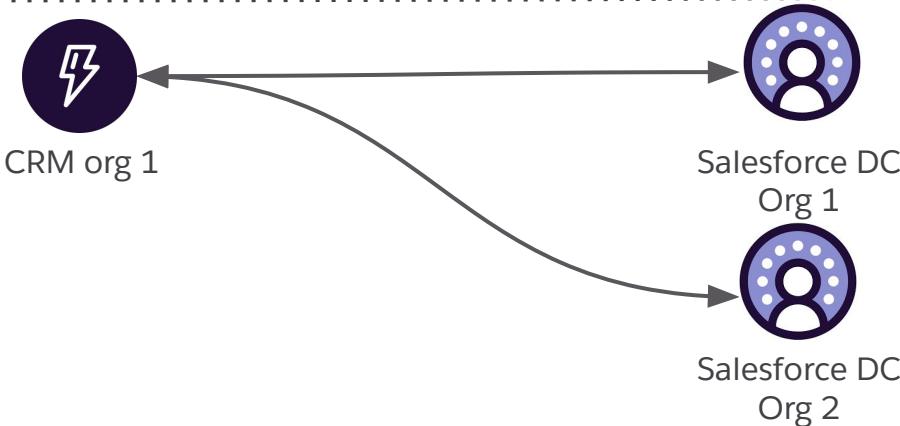


CRM - Data Cloud Topology



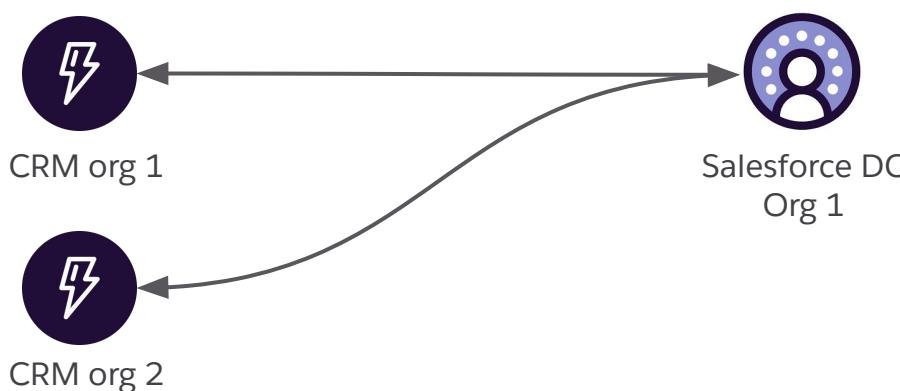
1 CRM org to 1 DC Org
(1:1)

A single CRM instance to a single Data Cloud instance (1:1) e.g. Home Org has both Data Cloud and Loyalty Cloud in the same Org.



1 CRM org to Multiple
DC Orgs (1:n)

A single CRM instance to more than one Data Cloud instances (1:M) e.g. a single CRM org needs to be segregated by regions or brands



Multiple CRM orgs to
a single DC Org (n:1)

More than one CRM instance to a single instance (M:1) e.g. brand data is aggregated from multiple CRM instances into a single instance (in Data Cloud) for consolidated view.

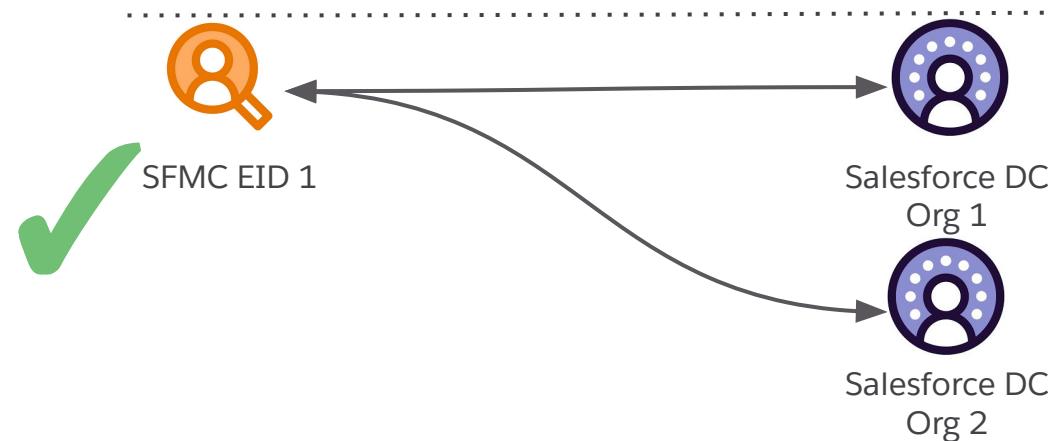


Marketing Cloud - Data Cloud Topology



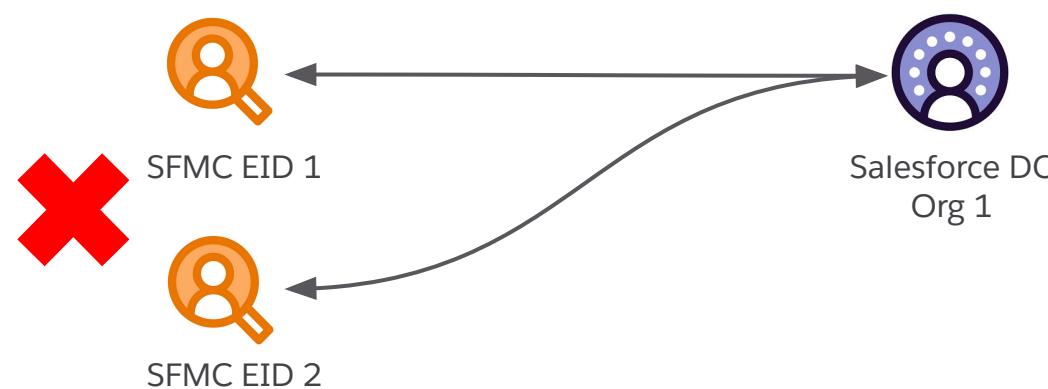
1 SFMC EID to 1 DC Org
(1:1)

As you might expect, yes, you can connect 1 Marketing Cloud org to Data Cloud.



1 SFMC EID to Multiple
DC Orgs (1:n)

You can connect more than one Data Cloud org to 1 marketing cloud org. This makes for easy testing and POC work with trial / demo orgs.



Multiple SFMC EIDs
to a single DC Org
(n:1)

Currently, more than one Marketing Cloud Account cannot be connected to Data Cloud, although this capability is on the roadmap (Forward Looking Statement)

Other Topology Considerations

- You can connect up to 5 Marketing Cloud Personalization datasets to Data Cloud
- You can connect any number of Salesforce CRM orgs to Data Cloud
- Commerce Cloud Sandbox orgs are not supported



Data Spaces



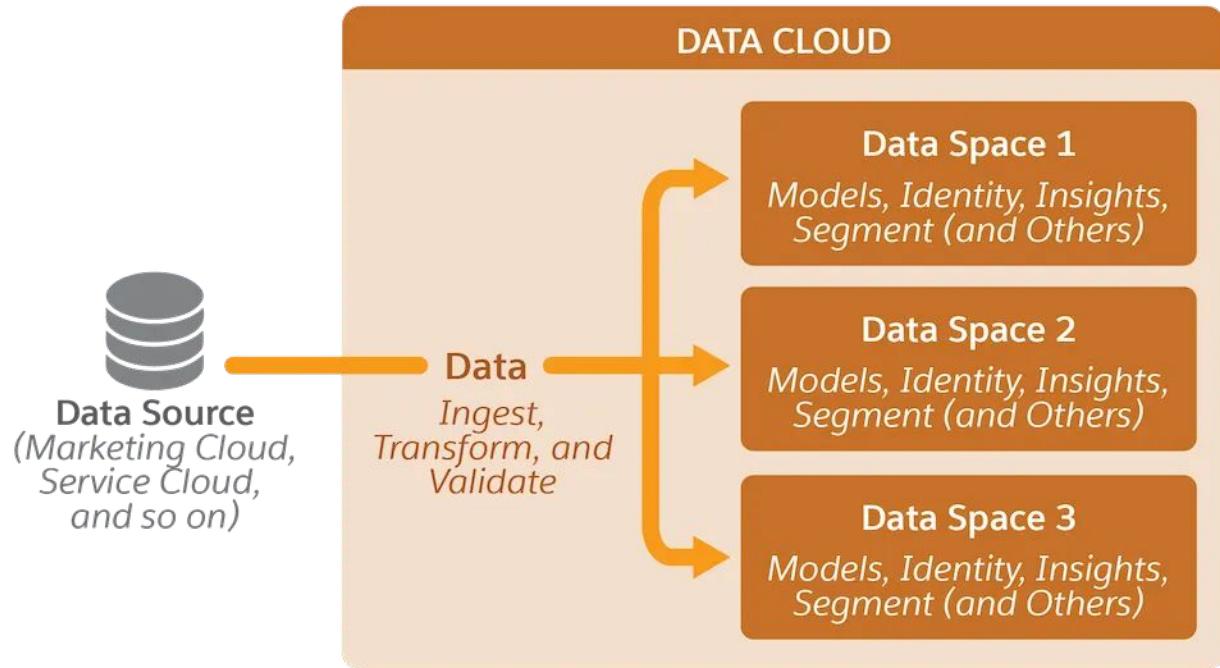
Data Spaces



A logical partition to organize your data for profile unification, insights, and marketing in Data Cloud. You can ingest data from any source at the same time to Data Cloud and then segregate it into multiple data spaces.

Identity resolution, calculated insights, segmentation, activation, and data actions can be created **in the context of a data space**.

Your users can view and work on data **only in the context of their data space**.



Data Spaces in Data Cloud



Organize data in Data Cloud to run business processes for multiple brands, departments, and regions

When to use Data Spaces

Single Data Cloud for multiple brands, regions, departments etc

Brands/dept /region need data and process segregation

When to NOT use Data Spaces

Data Spaces are NOT a Data residency solution

Cross brand/region data unification is the main scenario



Next Steps

Optional Hands-on activities



Data Cloud Learning Journey

Learning Journey Details
sfdc.co/DCCurriculum



[Data Cloud Pocket Guide](#)

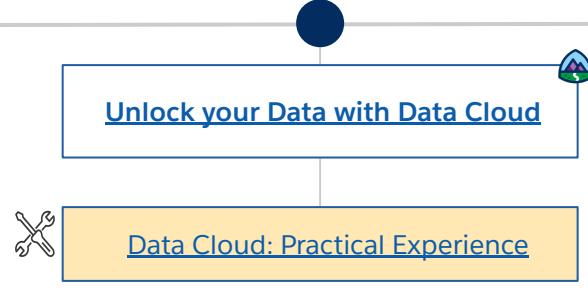
START
HERE



[Get Started with Salesforce CRM](#)

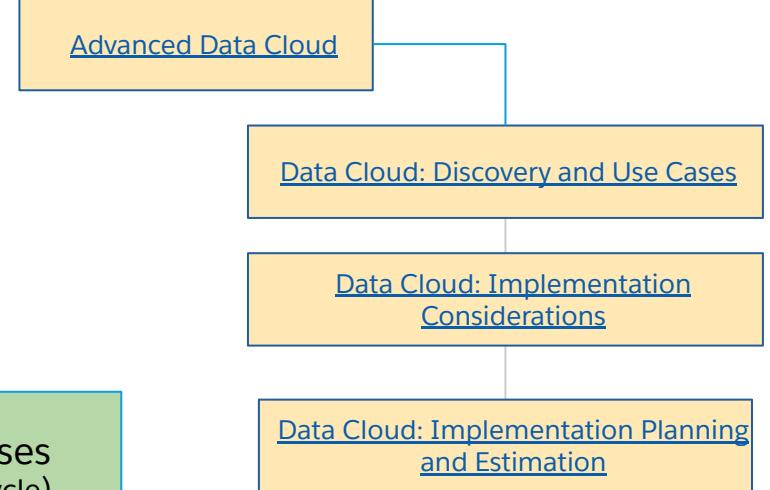


Begin Your Data Cloud Learning Journey



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



(Optional) - Hands on Activities

Partner Learning Camp



→ Activities

- Identity Resolution
 - Configure Identity Resolution
- Insights
 - Visual Builder
 - Using SQL
 - Deploy from Package
 - Streaming Insights
- Segmentation
 - Create & Validate Segments
- Activation
 - Create Activation Targets
 - Publish & Activate Segments



Activity: Configure Calculated Insights - Using SQL

Type: Task List • Time Estimate: 15m



[Configure Calculated Insights - Using SQL](#)

Configure calculated values using data ingested into the Salesforce Data Cloud instance in this hands-on exercise.

- I have completed the activity.



Activity: Configure Calculated Insights - Deploy From Package

Type: Task List • Time Estimate: 10m



[Configure Calculated Insights - Deploy From Package](#)

Use an unmanaged package and deploy it into your learning org in this hands-on exercise.

- I have completed the activity.



Activity: Configure Streaming Insights

Type: Task List • Time Estimate: 15m



[Configure Streaming Insights](#)

Build the infrastructure for a Streaming Insight and Data Action in this hands-on exercise.

(Optional) - Hands on Activities

Trailhead

→ Hands On Projects

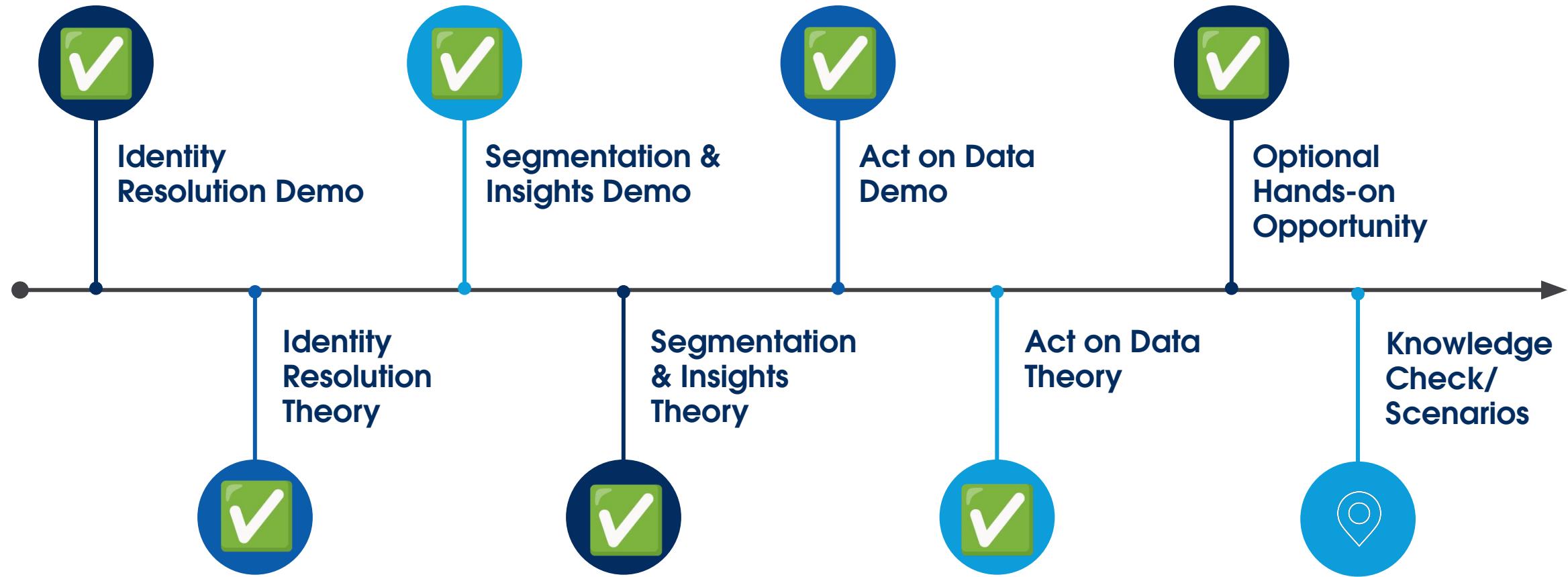
- [Get Hands-on With Data Cloud](#)
- [Quick Start: Create a Data Stream in Data Cloud](#)
- [Quick Start: Create an Identity Resolution Ruleset](#)
- [Quick Start: Enhance Data With Insights](#)
- [Quick Start: Create and Activate a Segment in Data Cloud](#)



This screenshot shows a Trailhead project page. At the top right, there are icons for +100 points and Intermediate level. Below that, a button says "Get Started with an Identity Resolution Ruleset" and indicates it takes ~25 mins. The main title is "Quick Start: Create an Identity Resolution Ruleset". A sub-instruction says "Use a ruleset to guide how Data Cloud unifies your customer profile data." There are also star and plus icons for favoriting or adding the project.

This screenshot shows another Trailhead project page. It has similar top-level icons and information. The main title is "Quick Start: Enhance Data with Insights". A sub-instruction says "Set up calculated insights with data from Data Cloud." There are also star and plus icons for favoriting or adding the project.

What have we accomplished today?





Knowledge Check



Knowledge Check



Question 1:

The system can only unify profiles if they are mapped correctly to the individual object and one of the two following objects: _____

- i. A Contact point object or a Party Identification object
- ii. Contact point object or an Account Object
- iii. Party Identification object or an Account Contact Object

Knowledge Check



Question 1:

The system can only unify profiles if they are mapped correctly to the individual object and one of the two following objects: _____

- i. A Contact point object or a Party Identification object
- ii. Contact point object or an Account Object
- iii. Party Identification object or an Account Contact Object

Knowledge Check



Question 2:

What kinds of rules are used in Identity Resolution Rulesets?

- i. Match Rules and Unification Rules
- ii. Duplicate Rules and Match Rules
- iii. Match Rules and Reconciliation Rules

Knowledge Check



Question 2:

What kinds of rules are used in Identity Resolution Rulesets?

- i. Match Rules and Unification Rules
- ii. Duplicate Rules and Match Rules
- iii. Match Rules and Reconciliation Rules



Knowledge Check



Question 3:

Which of the following are valid rules used in Reconciliation?

- i. Last Updated, Last Ingested & Most Common
- ii. Most Frequent, Last Updated & Source Sequence
- iii. Most Frequent, Source Sequence, First Created

Knowledge Check



Question 3:

Which of the following are valid rules used in Reconciliation?

- i. Last Updated, Last Ingested & Most Common
- ii. Most Frequent, Last Updated & Source Sequence
- iii. Most Frequent, Source Sequence, First Created

Knowledge Check



Question 4:

What are the two minimum requirements needed when using the Visual Insights Builder to create a Calculated Insight?

- i. WHERE clause & one at least one join
- ii. At least one measure & a WHERE clause
- iii. At least one dimension & at least one measure

Knowledge Check



Question 4:

What are the two minimum requirements needed when using the Visual Insights Builder to create a Calculated Insight?

- i. WHERE clause & one at least one join
- ii. At least one measure & a WHERE clause
- iii. At least one dimension & at least one measure

Knowledge Check



Question 5:

An administrator wants to be able to create a multi-dimensional metric to identify unified individual lifetime value (LTV). Which sequence of DMO joins are necessary within the Calculated Insight to enable this calculation?

- i. Unified Individual > Individual > Sales Order
- ii. Unified Individual > Unified Link Individual > Sales Order
- iii. Sales Order > Unified Individual



Knowledge Check



Question 5:

An administrator wants to be able to create a multi-dimensional metric to identify unified individual lifetime value (LTV). Which sequence of DMO joins are necessary within the Calculated Insight to enable this calculation?

- i. Unified Individual > Individual > Sales Order
- ii. Unified Individual > Unified Link Individual > Sales Order
- iii. Sales Order > Unified Individual



Knowledge Check



Question 6:

**Customer is experiencing over-grouping or too much consolidation of profiles.
Which of the below could reduce consolidation rate?**

- i. Reduce the number of Match Rules
- ii. Increase the number of Match Rules
- iii. Reduce the number of Match Criteria in a Match Rule

Knowledge Check



Question 6:

**Customer is experiencing over-grouping or too much consolidation of profiles.
Which of the below could reduce consolidation rate?**

- i. Reduce the number of Match Rules
- ii. Increase the number of Match Rules
- iii. Reduce the number of Match Criteria in a Match Rule

Knowledge Check



Question 7:

Which DMO can you create a segment on?

- i. Any DMO of type Profile
- ii. All DMOs
- iii. Only Unified Individual & Individual



Knowledge Check



Question 7:

Which DMO can you create a segment on?

- i. Any DMO of type Profile
- ii. All DMOs
- iii. Only Unified Individual & Individual



Knowledge Check



Question 8:

Once you enable value suggestion, how long can it take for it appear in the Segmentation Canvas?

- i. Up to 12 hours
- ii. Up to 24 hours
- iii. It's enabled instantaneously



Knowledge Check



Question 8:

Once you enable value suggestion, how long can it take for it appear in the Segmentation Canvas?

- i. Up to 12 hours
- ii. Up to 24 hours
- iii. It's enabled instantaneously

Knowledge Check



Question 9:

Which of the following data action targets are supported within Data Cloud?

- i. Salesforce Marketing Cloud, Commerce Cloud & Cloud File Storage
- ii. Salesforce Commerce Cloud, Slack, & Salesforce Marketing Cloud
- iii. Webhook, Salesforce Marketing Cloud, & Salesforce Platform Event

Knowledge Check



Question 9:

Which of the following data action targets are supported within Data Cloud?

- i. Salesforce Marketing Cloud, Commerce Cloud & Cloud File Storage
- ii. Salesforce Commerce Cloud, Slack, & Salesforce Marketing Cloud
- iii. Webhook, Salesforce Marketing Cloud, & Salesforce Platform Event

Knowledge Check



Question 10:

What 2 file types are created when activating a segment to Amazon S3?

- i. csv & json
- ii. txt & csv
- iii. parquet & csv



Knowledge Check



Question 10:

What 2 file types are created when activating a segment to Amazon S3?

- i. csv & json
- ii. txt & csv
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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



Data Cloud Cert Prep Resources

- Decks for these sessions will be provided here
- Review the content esp 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>



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Thank you

