



Data Cloud Certification Prep

Session 1 of 3



First, some logistics

Questions, answers and videos

How do you ask a question?

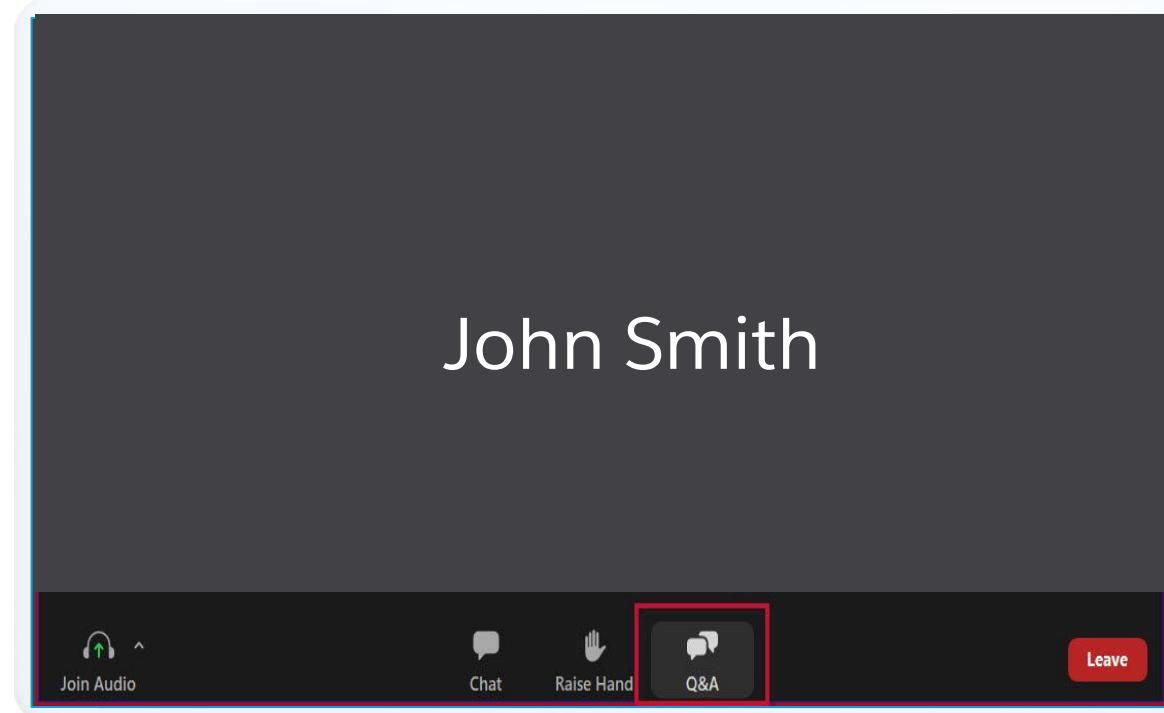
- Post your question in the Q&A section on your Zoom Window.

How do you turn on Closed Captions?

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

Will this be available as a recording after today?

- Yes, a recording of this event will be available on demand



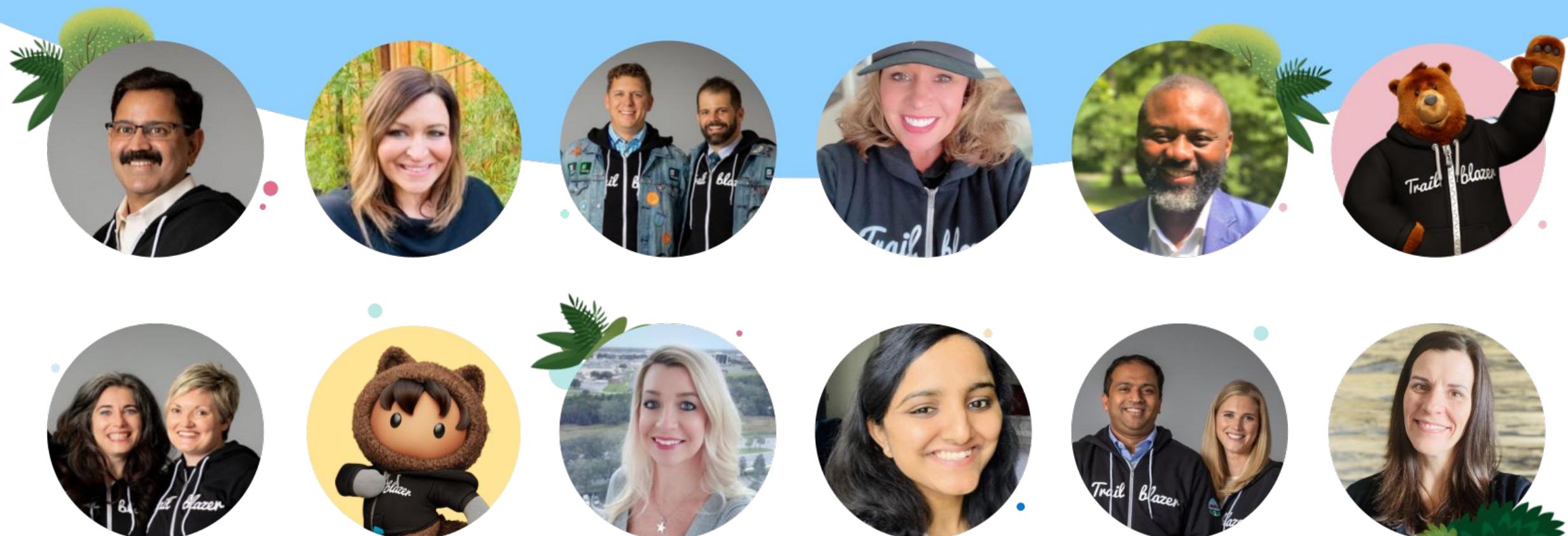
Forward Looking Statements



This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, our strategies, expectation or plans regarding our investments, including strategic investments or acquisitions, our beliefs or expectations regarding our competition, our intentions regarding use of future earnings or dividends, and the expected timing of 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, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. 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current and potential litigation involving us or our industry, including litigation involving acquired entities, and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or remote work policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to maintain and enhance our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of transfers and the value of such transferred intellectual property; uncertainties regarding the effect of general economic, business and market conditions, including inflationary pressures, general economic downturn or recession, market volatility, increasing interest rates, changes in monetary policy and the prospect of a shutdown of the U.S. federal government; the potential impact of financial institution instability; the impact of geopolitical events, including the ongoing armed conflict in Europe; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; our ability to execute our share repurchase program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; expected benefits of and timing of completion of the restructuring plan and the expected costs and charges of the restructuring plan, including, among other things, the risk that the restructuring costs and charges may be greater than we anticipate, our restructuring efforts may adversely affect our internal programs and ability to recruit and retain skilled and motivated personnel, our restructuring efforts may be distracting to employees and management, our restructuring efforts may negatively impact our business operations and reputation with or ability to serve customers, and our restructuring efforts may not generate their intended benefits to the extent or as quickly as anticipated; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives, including our ability to comply with emerging corporate responsibility regulations.



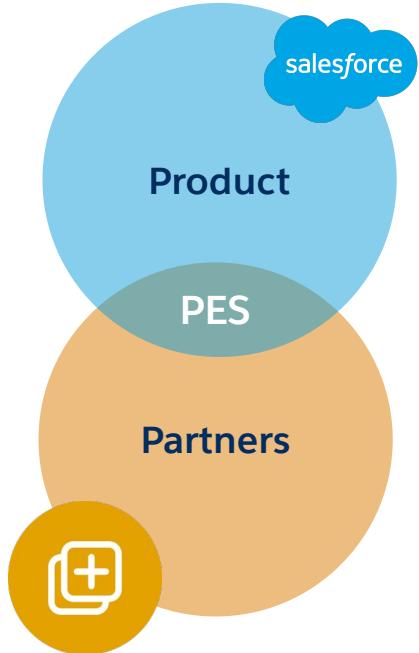
Thank You, Partners



Today's Presenter



Matt Wash
Sr Manager,
Partner Enablement Success



AI + Data Partner Success Team



Tracy Novotny
Sr. Director
AMER



Arvind Raman
Director
AMER

DATA CLOUD



Eyal Hutter
Manager
EMEA

**CROSS
CLOUD
DATA FOCUS**



Matt Wash
Sr. Manager
AMER



Gajendra Singh Sisodia
Sr. Manager
India



Christopher Long
Sr. Manager
AMER



Aman Jain
Sr. Manager
APAC



Justin Plant
Director
APAC



Vikas Roy
Director
AMER



Claudio Moraes
Director
AMER

AI





Why you should get Data Cloud Certified

*and how this series will help you get
prepared in THREE Days



“Our Data Cloud is like a rocket ship. The entire AI revolution is built on this foundation of data and it's why we're so excited about this incredible Data cloud.

It's now deeply integrated into all of our apps, into our entire platform. It's self-service for all of our customers to turn on. It is our fastest-growing product ever. It's our total focus for fiscal year '25 with Salesforce Data Cloud”

-Marc Benioff, Feb 28, 2024



Einstein 1 is the trusted platform built for the AI Enterprise



Deeply integrated

Shared data and metadata across CRM apps

Intelligent and conversational

One unified copilot experience across every app

Automated

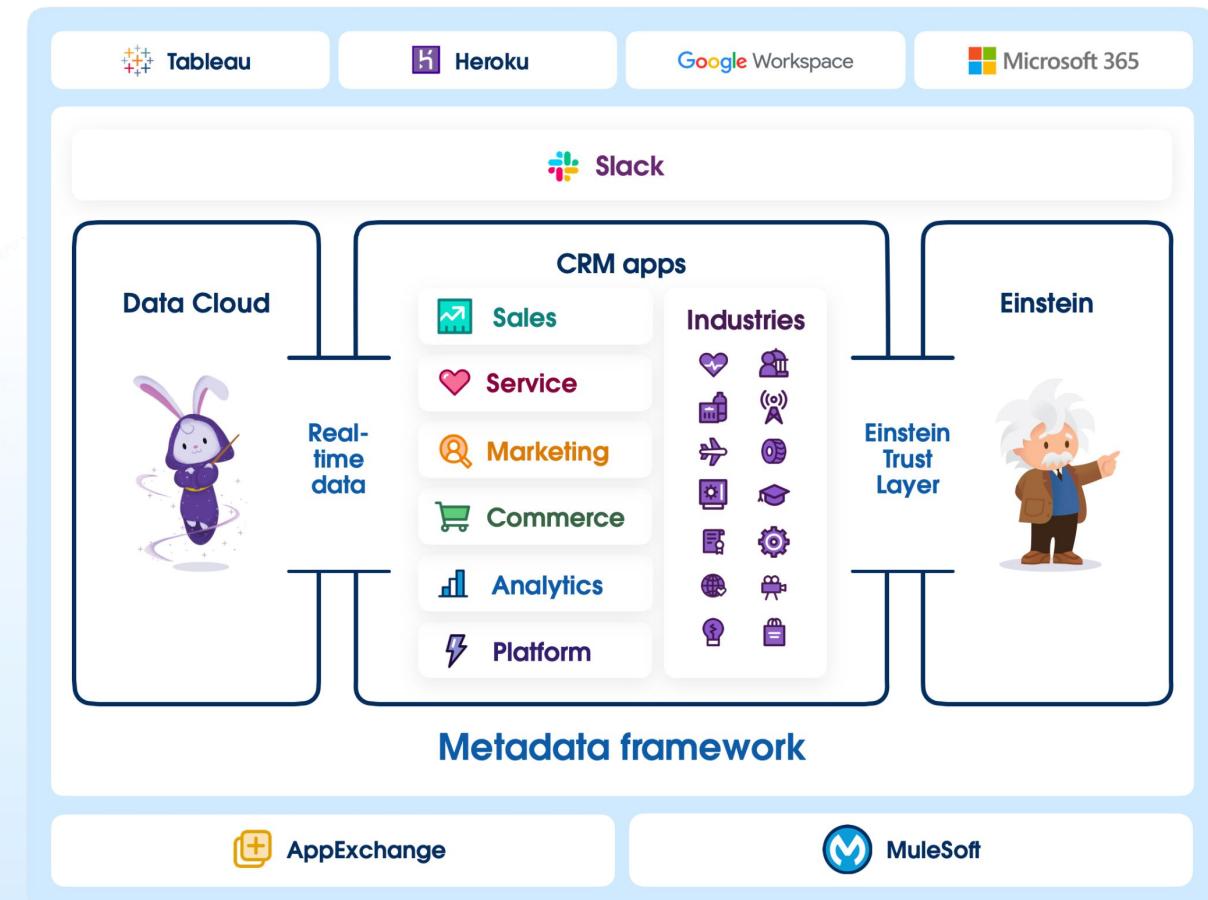
AI-powered workflows using your unified data

Low code and no code

Democratized AI development for all

Open

Any partner, app, system, or AI model



**Skate to where the puck is going to
be, not where it's been.**

- Wayne Gretzky



Individual Benefits

What's in it for you?

- 1 **Career progression** for any role no matter of background. Get closer to the most innovative areas of the platform
- 2 **Implementation readiness** for current and future projects that go beyond single cloud.
- 3 Broader **employment opportunities** due to expanded skillset.

Partner Benefits

What's in it for you?

1

Skilled employees are implied frontline sellers. They identify and bring **new opportunities** while working on the existing projects.

2

Avoiding misrepresentation and lost opportunities due to the knowledge gap. Maintain **competency** as part of your **brand**.

What to expect from these Cohorts



We will cover

Data Cloud
Certification
Topics

We will not cover

Anything that
is not related
to Data Cloud
Certification
Topics ;)

Agenda

Overview | Setup | Ingestion & Modeling

Intro to Optional Hands-on exercises

Knowledge Check

Q&A





Data Cloud Overview (18%)



We're getting buried in data



Data scaling exponentially

328M terabytes daily

Data on data on data

Metadata exploding

Your own data is king

Death of 3rd party cookies

300B words to train GPT 4

AI is nothing without data

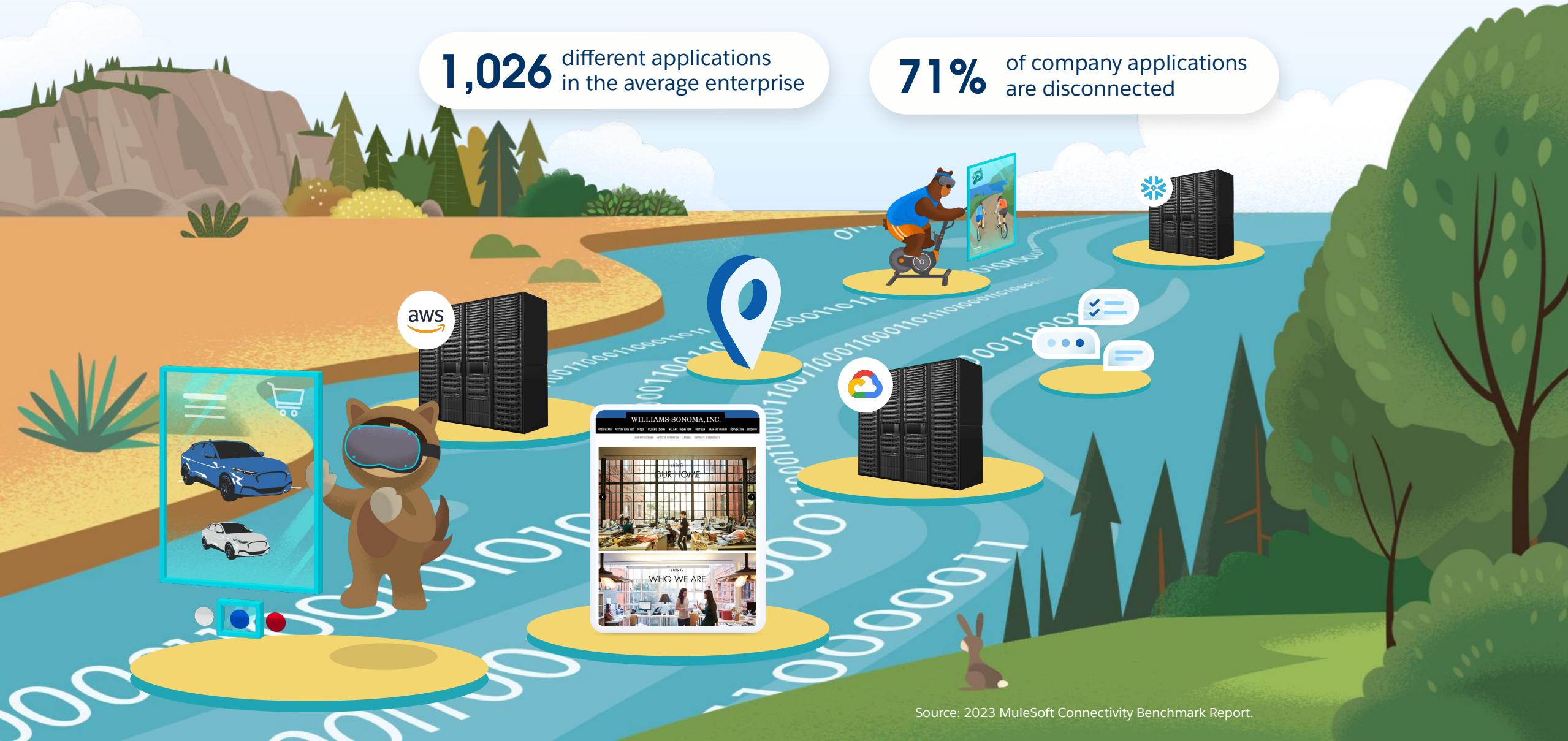


Companies are racing to get their disconnected data in order



1,026 different applications
in the average enterprise

71% of company applications
are disconnected



Source: 2023 MuleSoft Connectivity Benchmark Report.

But bringing it together to use in our systems of engagement is messy and complex



We have the right tools to manage and organize our data but still struggle at the last mile of activation



Incomplete picture

Multiple reps working on the same lead



Data bottlenecks

Slow access to the right data leads to missed opportunities



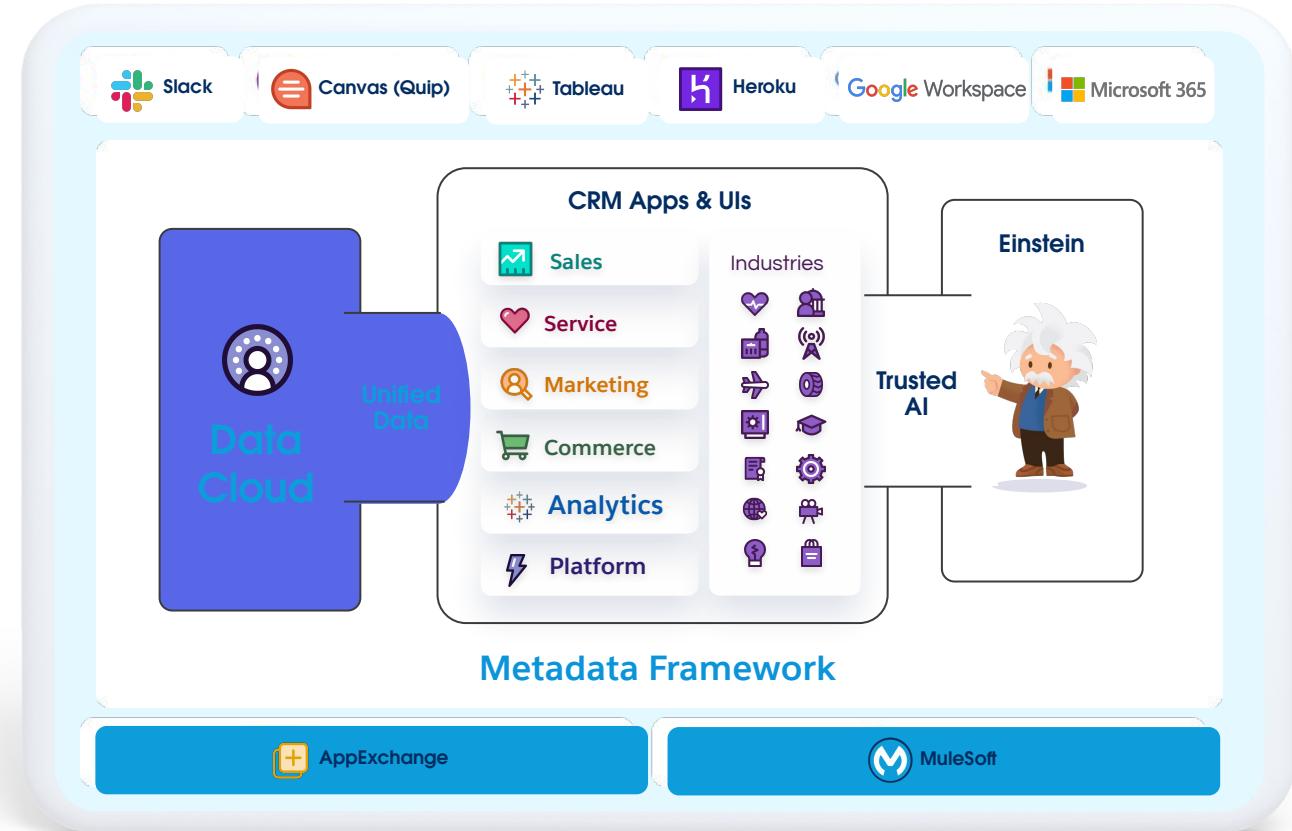
Inaccurate data

Reps don't trust the data so they avoid using it



The Einstein 1 Platform solves these challenges

With Data Cloud as the foundation
that makes everything possible



Salesforce Data Cloud

Unlock trapped data to build a 360-degree view of the customer every team can act on



The screenshot displays the Salesforce Data Cloud interface. On the left, a detailed customer profile for Janette Wilson is shown, including her name, address, ID, email, product affinity (Trail & Hiking Gear), segment propensity (High Propensity to Buy), lifetime value (\$2,397.09), propensity to purchase (More Likely), and engagement score (79%, Highly Engaged). Below this is a "Profile Data" section with icons for shopping cart, user, heart, and mail. In the center, there are two main sections: "Customer Engagement" (last 30 days) and "Next Best Action". The engagement section shows "Website Visits (2)" to NTO.com/localhikes.html and "Merchandise Purchased (17)" for High-Rise Natural Tights. The next best action section shows a "Segment Addition: Hiking Enthusiast Segment" and a "Promotional Recommendation" for 2 For 1 Trail Runners. On the right, a large "Engagement Feed" window lists various customer interactions: a Website Visit (Shop by Running, August 14, 2022), a Loyalty Account Created (Hiking Enthusiast Segment, August 14, 2022), another Website Visit (Collection Pages, August 14, 2022), a Promotional Recommendation (2 For 1 Trail Runners, \$70+, In stock), a Mobile App Visit (Viewed NTO Trail Maps, August 11, 2022), and an In Store interaction (Online Exclusive T-Shirt - Brown, Size:M, \$59, March 14, 2022).

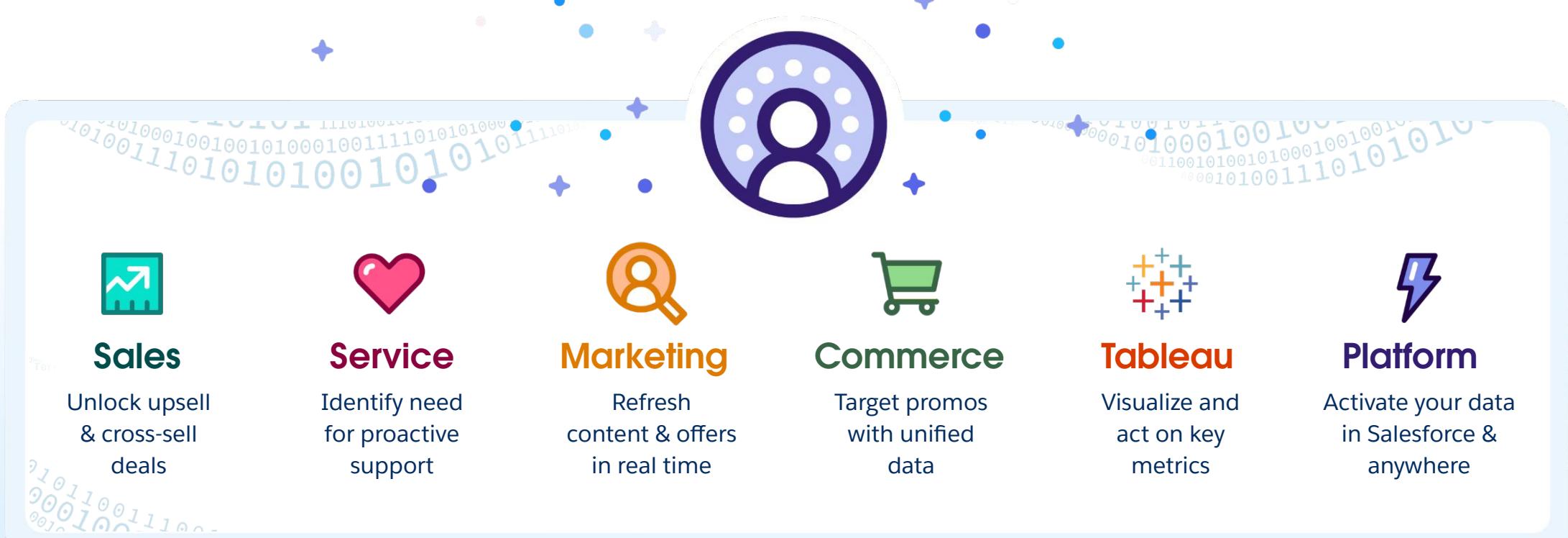
Connect and Unify Your Data
without building complex data pipelines

Activate Your Data
with insights and automation across every
customer touchpoint

Enable Trusted AI
grounded with all your enterprise data

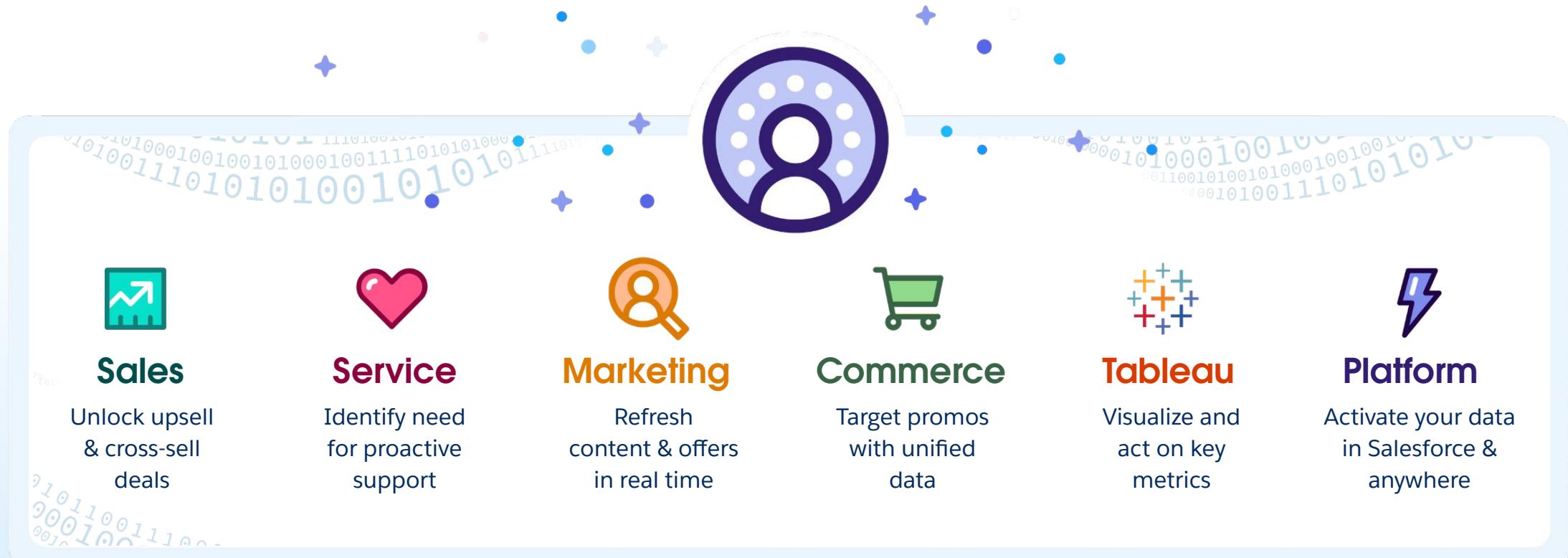


Data Cloud makes every cloud better





Data Cloud makes every implementation better



Faster Time To Value

Less re-work

Easier Integration

How Companies can use Data Cloud



What data do we wish our users had access to?

Connect & Harmonize

How can these data allow us to better understand and predict?

Analyze & Predict

How can we work more efficiently with these data?

Automate & Take Action

What tasks could we automate for our teams?

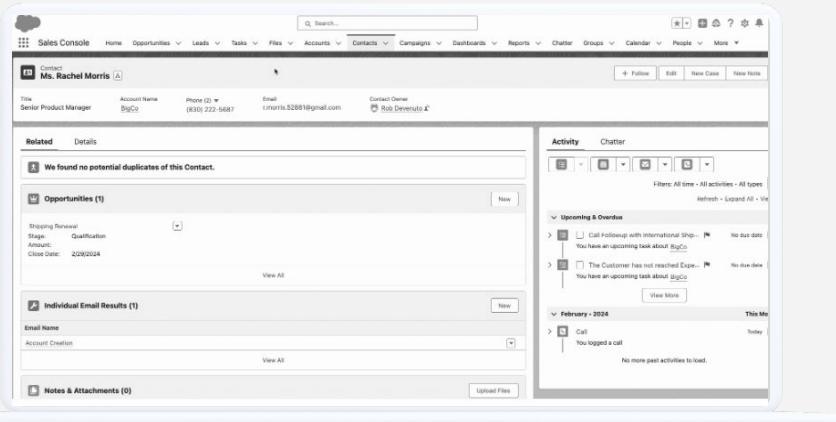
Ground AI in Trusted Data



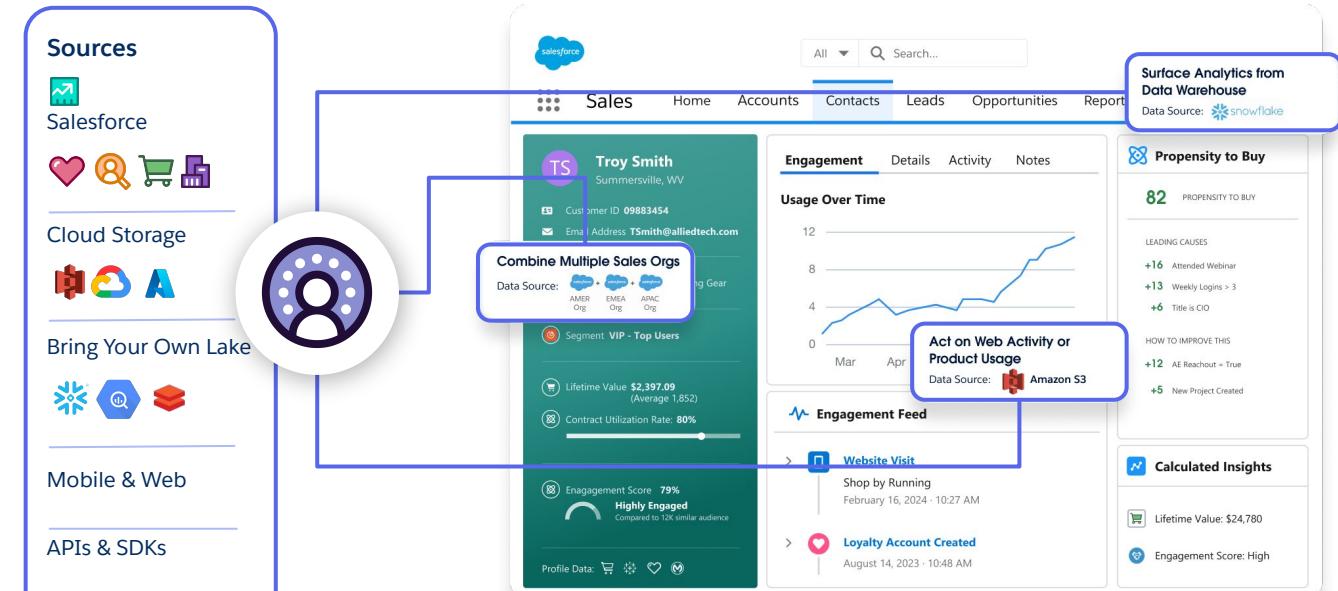
Data Cloud is natively integrated with Salesforce, eliminating the need for complex data pipelines and integrations



Without Data Cloud



With Data Cloud



Foundations: Data Cloud Core Capabilities

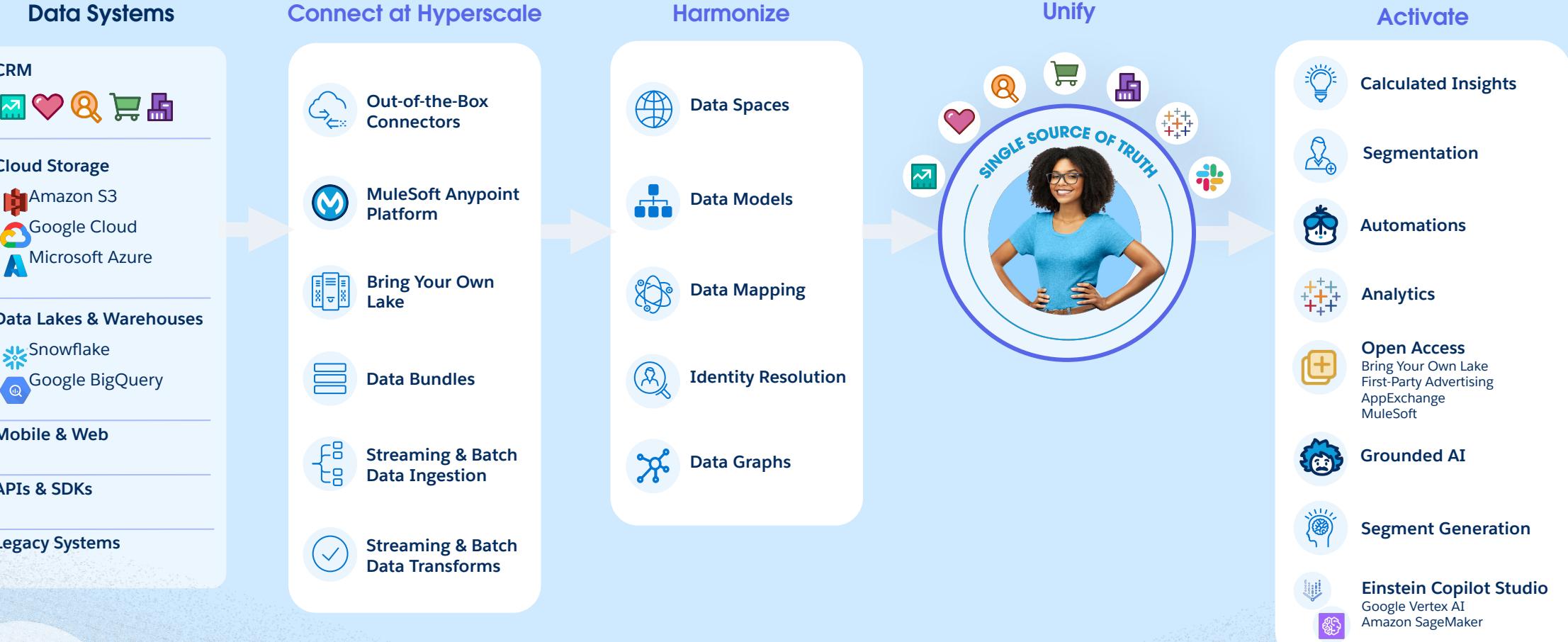


Remember the order: Connect->Harmonize->Unify->Analyze->Activate

1. **Connect:** Import all relevant customer data at scale, from any app, device, or real-time stream with out-of-the-box Connectors.
2. **Harmonize:** Organize all the connected customer data into a singular, standardized data model based on the Salesforce Customer 360 platform data model
3. **Unify:** With data in a single customer graph, anticipate customer needs and preferences with unified profiles that adapt to their activity in real time.
4. **Analyze and Predict:** Gain insights on unified customer data from powerful analytical tools like Tableau.
5. **Activate:** Unified customer profiles empower teams to create intelligent, automated experiences across the Customer 360. This unified data gives teams everything they need to know about customers as they interact with the business.

Let's walk through how this works

A “day in the life” of customer data



Data Cloud Demo



The Big Picture: Implementation Themes

Related to the components of Data Cloud



Provisioning

Provision and set up Data Cloud instance, users and permissions, configure integrations to source/target systems, etc.

Data Ingestion

Set up **data streams** bringing data into Data Cloud from various supported sources and applying necessary transformations

Data Mapping (Harmonization)

Map ingested data into the Customer 360 data model, making it available for unification, segmentation and activation

Identity Resolution (Unification)

Configure rules for individual matching across sources of data, establish preference for unified attributes reconciliation rules

Data Preparation

Insights & Analytics

Derive insights from your mapped data, explore and visualize it in the analytical and business intelligence tools.

Segmentation

Turn mapped data into useful audiences or segments, to understand, target or analyze customers at the unified level.

Activation

Materialize created segments and publish to relevant activation/engagement platforms. Trigger relevant business processes based on data points identified within Data Cloud. Consume and expose data in relevant user experiences within other systems .

Data Consumption



Data Cloud Setup and Administration (12%)



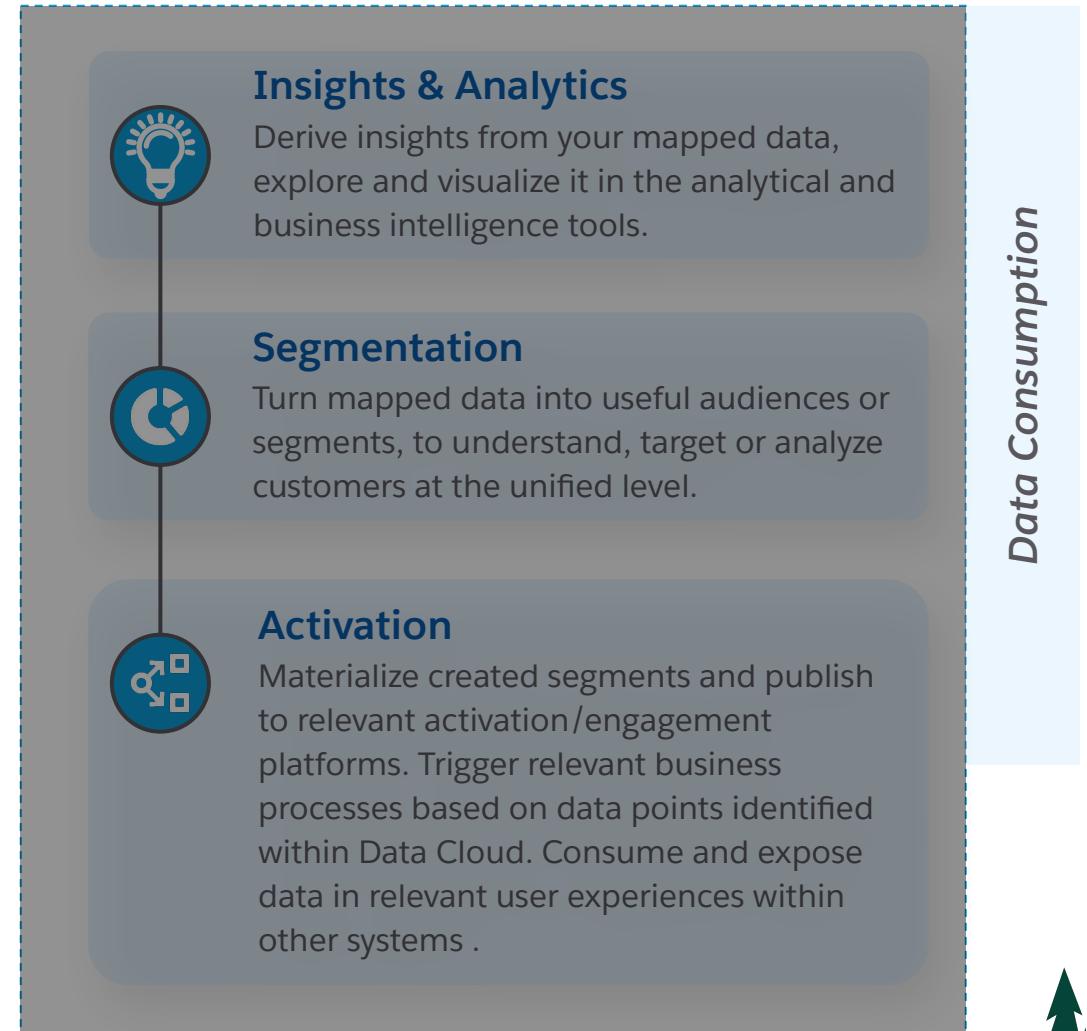
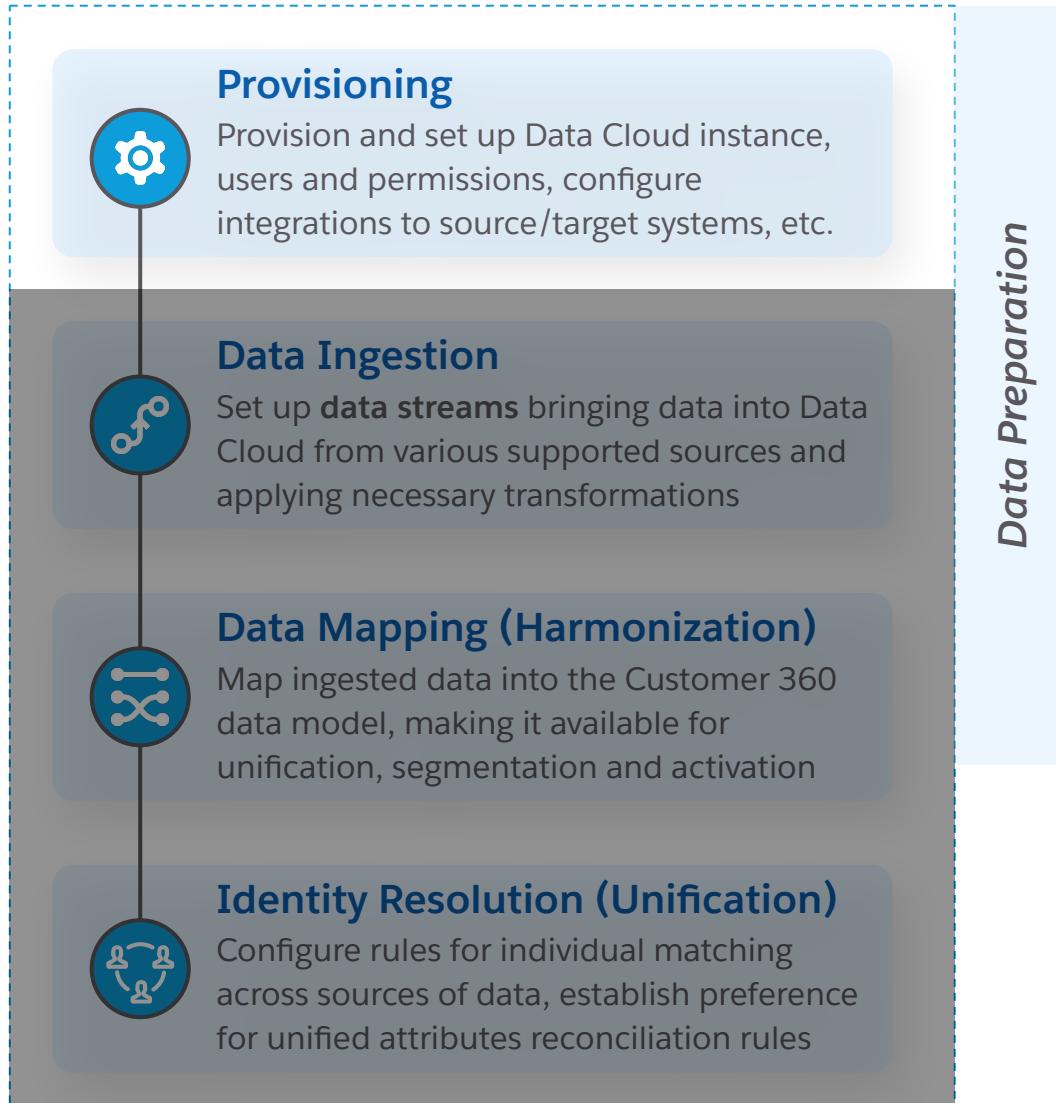


Data Cloud: Provisioning & Setup



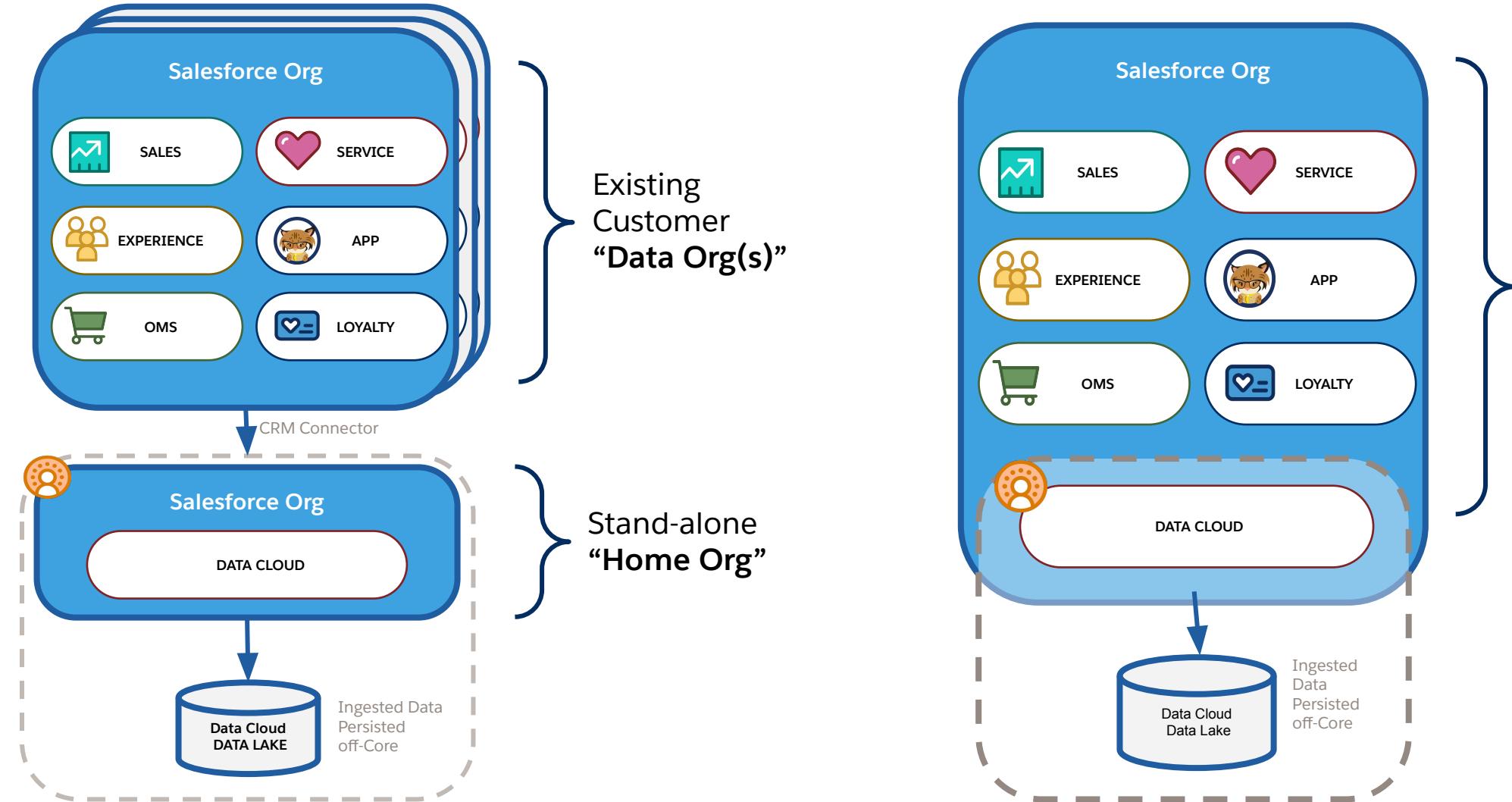
The Big Picture: Implementation Themes

Related to the components of Data Cloud



Data Consumption

Data Cloud can sit in either of the orgs!



Deploying Data Cloud in its own Standalone Org vs. Existing Data Org



Standalone Data Cloud Org

Data Cloud can be provisioned in a new Salesforce Core Platform Org that exists as a **standalone** system of reference, with *connections* to any number of connected orgs. Other orgs must retrieve Data Cloud's data via APIs.

Data Cloud Added to Existing Org

Data Cloud can be provisioned into an existing org, acting as an **integrated** system of reference, extending its data and capabilities to the org in which it's deployed as well as any number of other connected orgs which can retrieve data via APIs.

Most OOTB DC *exposed-to-Salesforce* features only exist in the DC's Home Org

Considerations around workflow, data governance, org administration, security models, integrations and others also influence a customer's decision on where CDP should be deployed

Data Cloud Initial Configuration Steps



1

Update Admin User

Add the *Data Cloud Admin* or *Data Cloud Marketing Admin* permission set to a System Administrator

2

Provision Data Cloud App

Navigate to Setup gear and click **Data Cloud Setup** then click **Get Started**

3

Create Profiles

Create Profile(s) for Data Cloud users by cloning the standard Identity User profile. Select the **Data Cloud** as default under **Custom App Settings**.

4

Add Users and Permission Sets

Create Data Cloud users and assign appropriate [permission sets](#). Apply the appropriate Object / Field visibility to the Data Cloud Salesforce Connector permission set.

5

Proceed with Implementation

Work with your implementation partner to setup data connections, ingest data, configure identity resolution, calculated insights, segments and activation targets.

Data Cloud Permission Sets



Data Cloud Admin

Access all functionality
Responsible for the setup of the application, user provisioning, and assigning permission sets within the system

Data Cloud for Marketing Manager

Manage the overall segmentation strategy, including creating activation targets and activations.

Data Cloud for Marketing Admin

Another permission set similar to Admin, can administer Segmentation and Activation

Data Cloud User

View Data Cloud Features

Data Cloud for Marketing Data Aware Specialist

Map data to the data model and create data streams, identity resolution rulesets, and calculated insights.

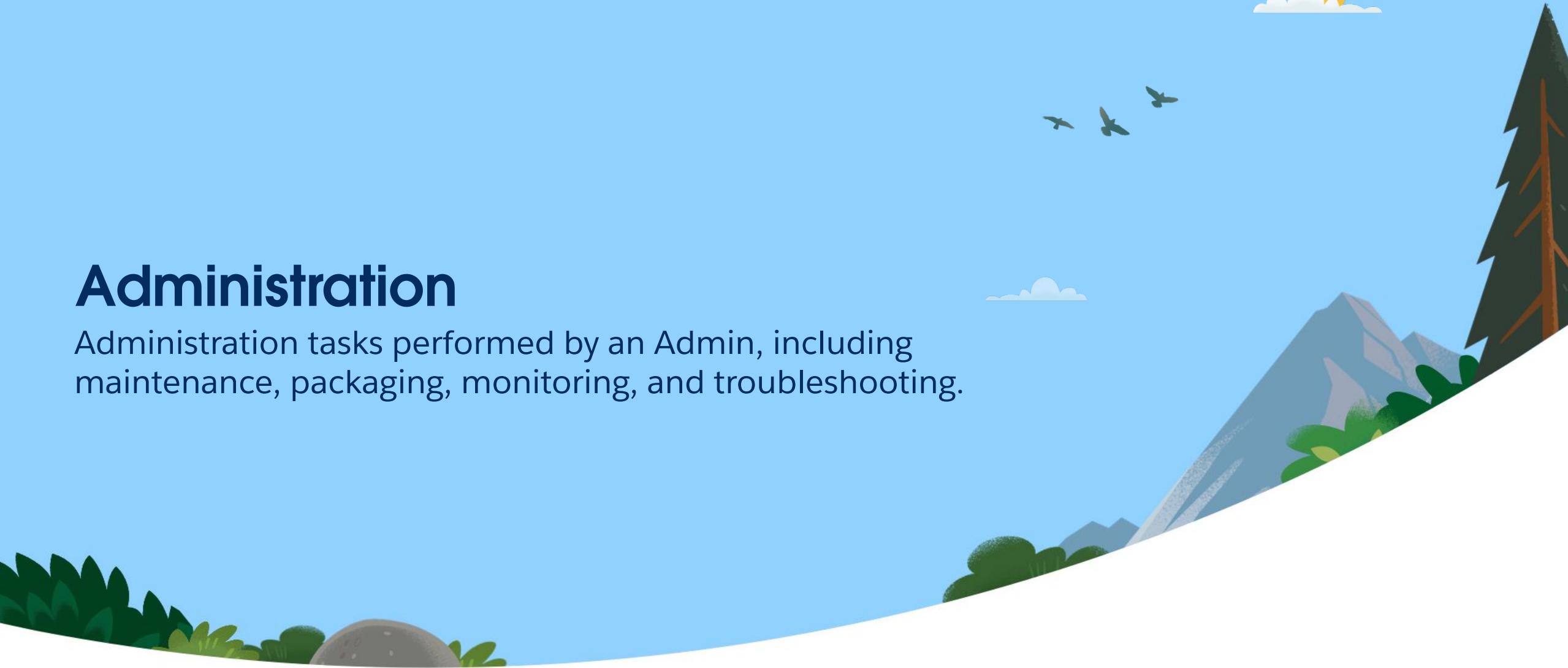
Data Cloud for Marketing Specialist

Create segments



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

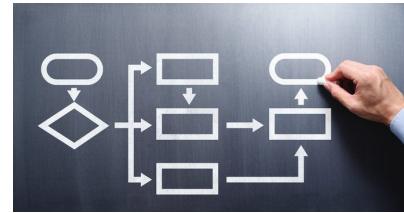
“

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

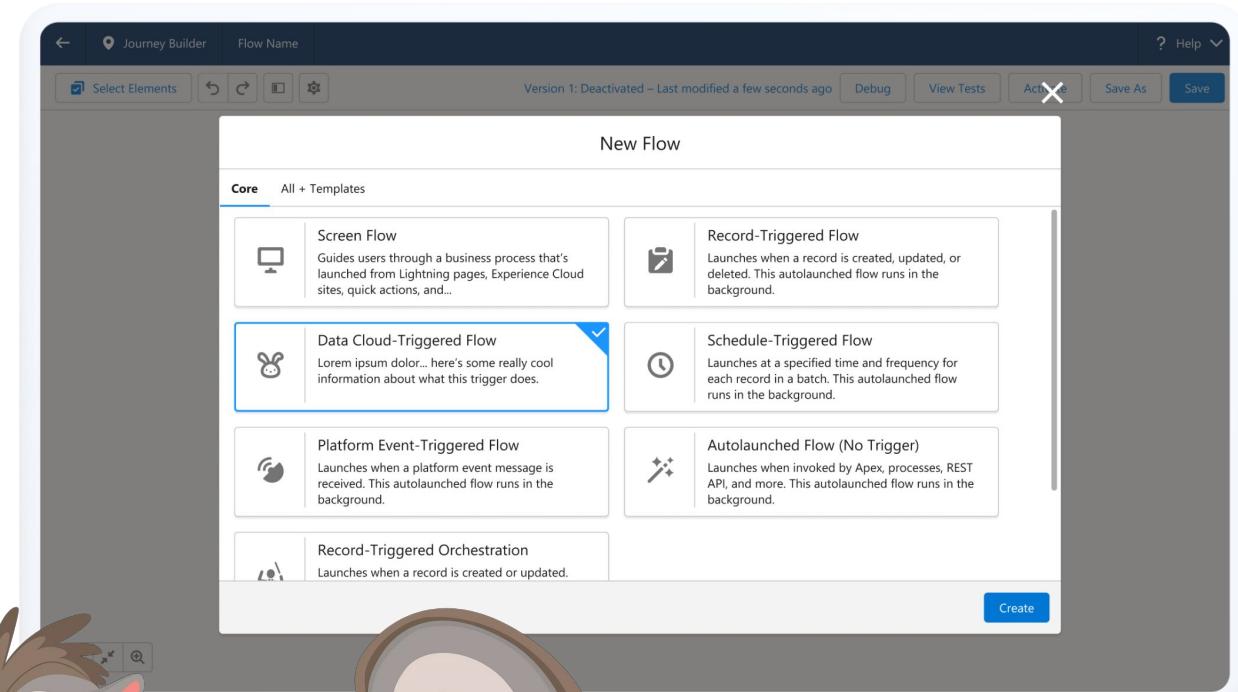
Data Cloud Triggered Flows

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)

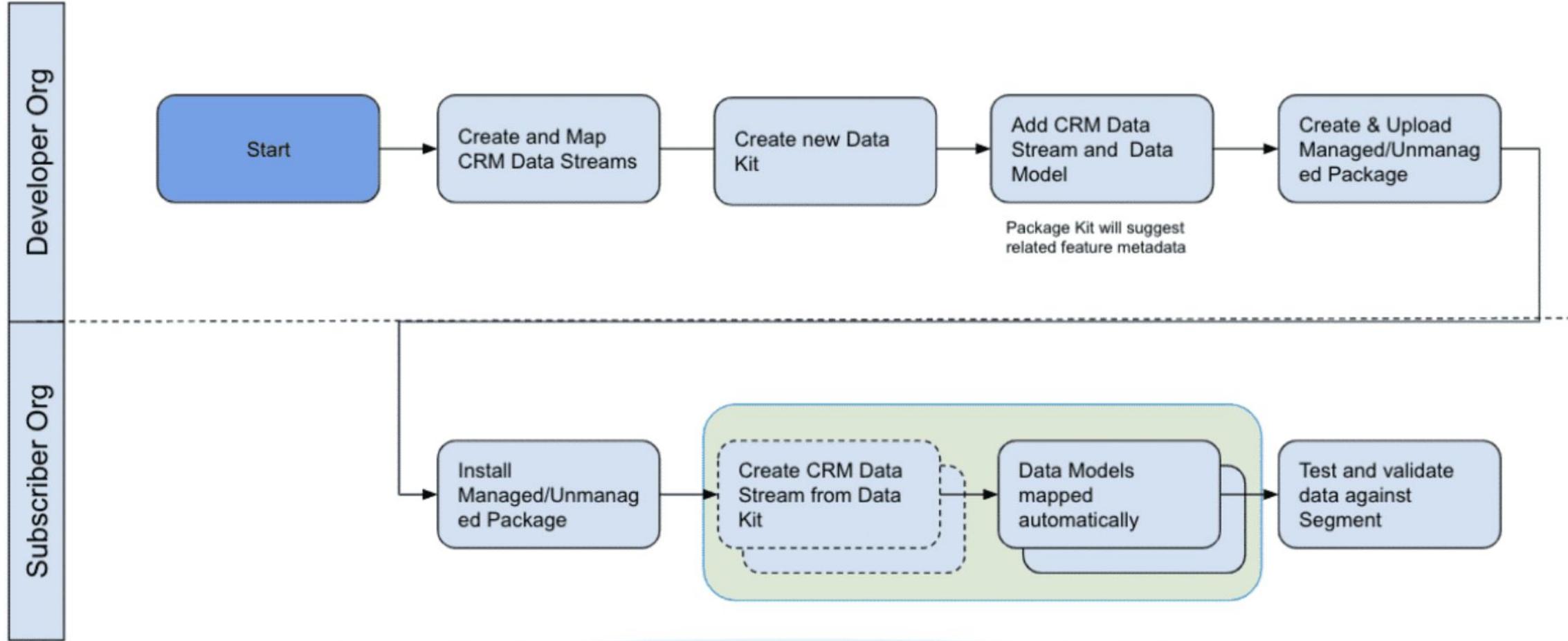
- Data Cloud is built on top of Salesforce and uses the same packaging framework
- Supports packaging of Data Streams, Data Models, Calculated Insights, Data Shares

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



Data Sources Connectors



Connected Sources

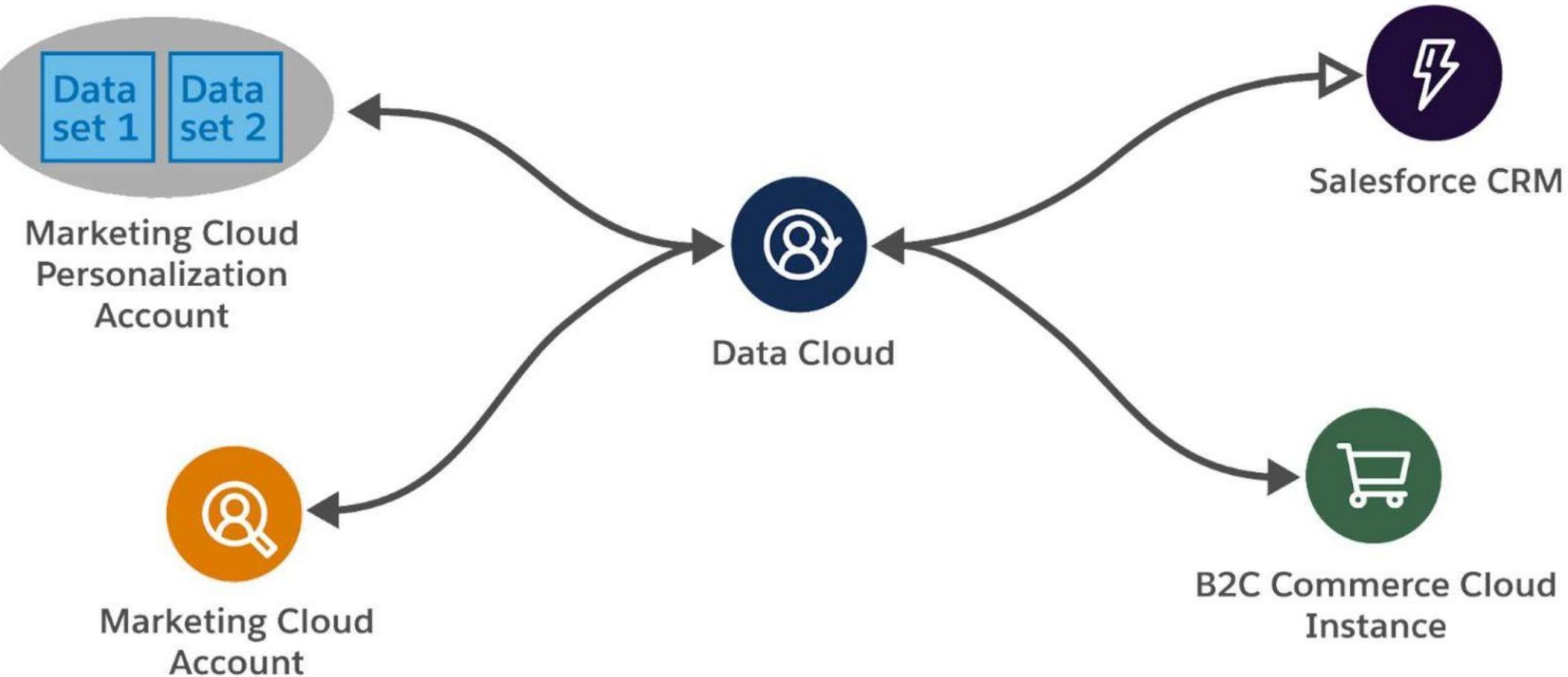
 Marketing Cloud Starter data bundles and Data Extensions	 Salesforce CRM Import objects from Salesforce CRM	 B2C Commerce Import objects from B2C Commerce	 Mobile App Import events from iOS and Android applications
 Website Import events from your connected websites.	 Ingestion API Stream and/or bulk upload data from external sources	 Interaction Studio Marketing Cloud Interaction Studio Bundle	

Other Sources

Load a sample file in order to teach the system about your file's structure. At the end of this set up flow, you'll be able to specify where data should be retrieved from on an ongoing basis.

 Amazon S3 Retrieve a file from Amazon Simple Storage Service	 Google Cloud Storage Retrieve a file from Google Cloud Storage.	 Use Ingestion API to bring in data from the MuleSoft Anypoint Platform. Learn More in MuleSoft
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Data Cloud Topology



Starter Data Bundles

Ingest data sets via Salesforce Starter Bundles

A starter data bundle imports pre-defined Objects/Datasets from a Data Source.

- Sales Cloud
- Service Cloud
- Salesforce Loyalty
- Salesforce Unified Health Scoring
- Salesforce B2C Commerce
- Salesforce Marketing Cloud
- Salesforce Marketing Cloud Personalisation



Example : Marketing Cloud Starter Data Bundles

Email

The Email Studio dataset has email engagement events such as sends, opens, clicks, bounces, complaints, unsubscribes, and Einstein Engagement Scores.

MobileConnect

The MobileConnect dataset has engagement events, such as sends, delivers, undelivers, opt-ins, and opt-outs.

MobilePush

The MobilePush dataset has engagement events, such as sends, opens, displays, undelivers, geofence entries and exits, and Einstein Engagement Scores.



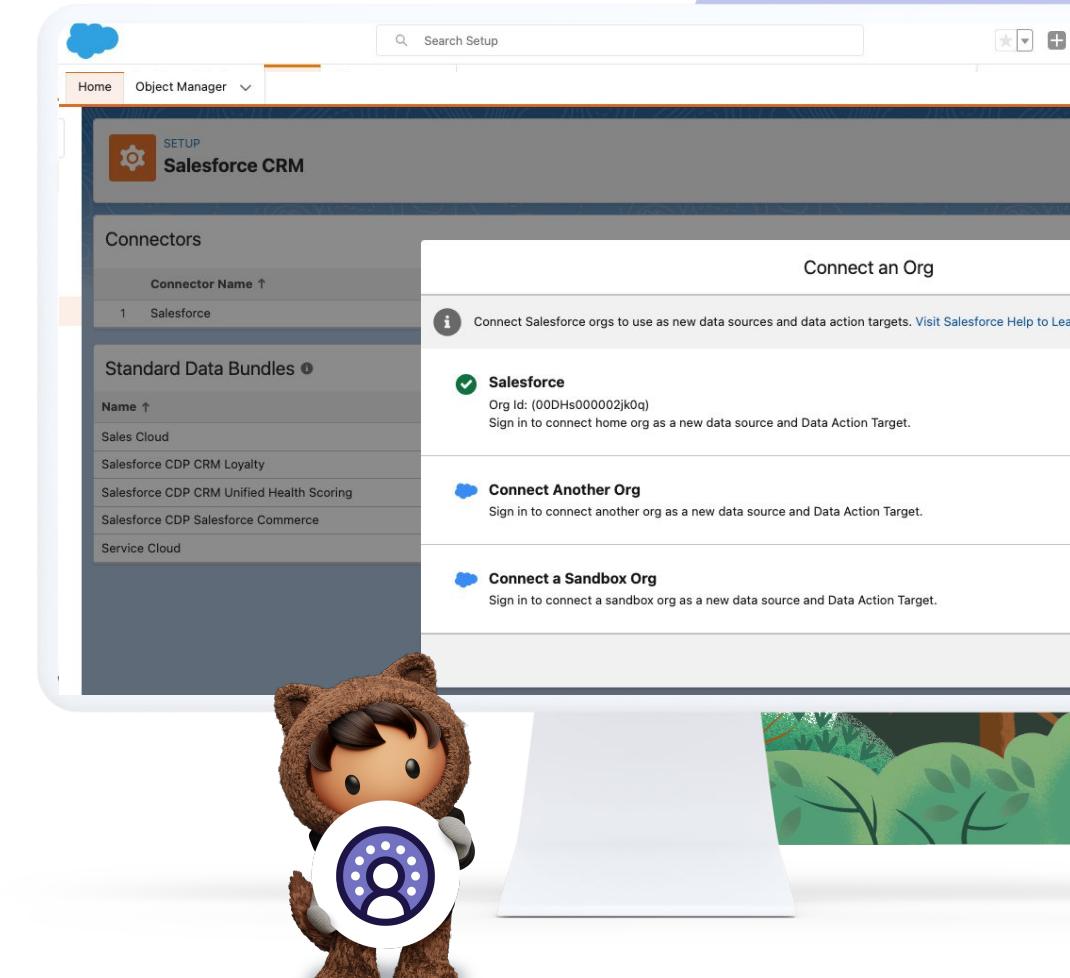
Salesforce CRM Connector



Home org: This is the org where it's installed. If the customer is using this org for Sales Cloud or Service Cloud or Loyalty Management, they may use the connector to ingest CRM data from within the Home org.

External orgs: These CRM orgs are external to the org where it's installed. Customers may connect to any production external orgs, including other orgs where it may be installed.

Sandbox orgs: These are sandbox CRM orgs that are external to the org where it's installed. Customers may connect to any sandbox external orgs.

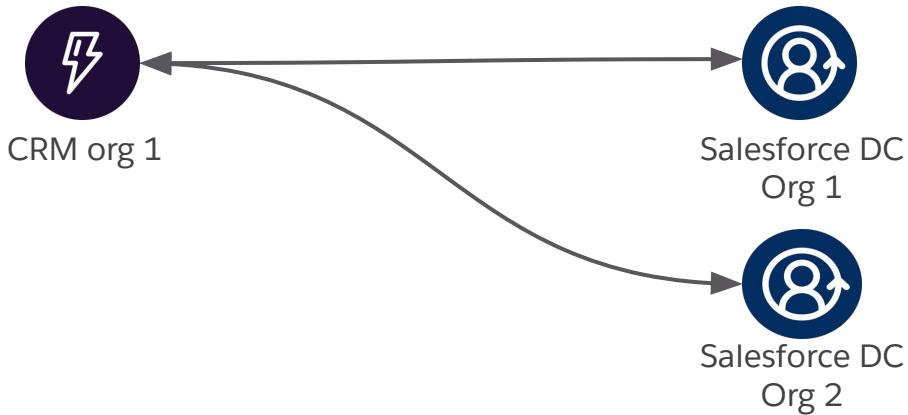


CRM - Data Cloud Topology



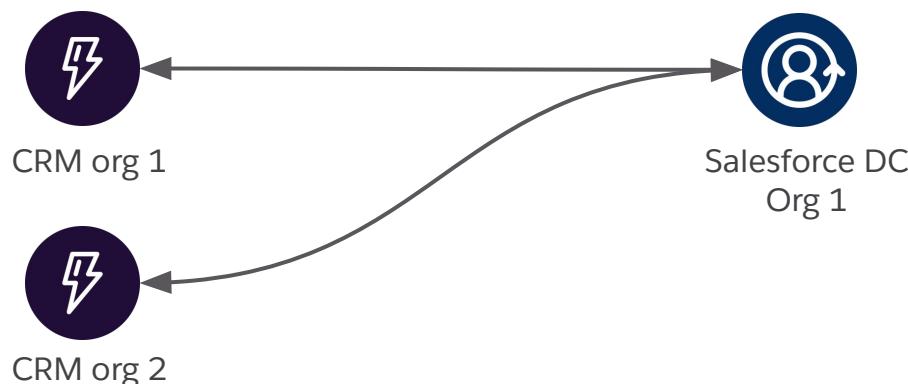
1 CRM org to 1 DC Org
(1:1)

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.



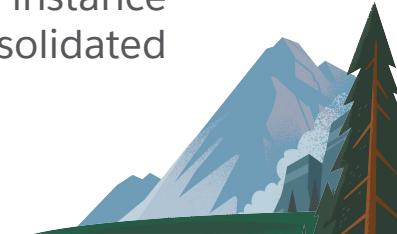
1 CRM org to Multiple
DC Orgs (1:n)

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.



Amazon S3 Connector



- Lets You ingest and activate data from and to S3 buckets
- Amazon S3 connections for data ingestion are **configured individually at the data stream level** (*No prior configuration is required by admin*)
- Single Data Cloud account can connect to multiple S3 buckets

New Data Stream

Select a source for the data stream to unify your data.

Connected Sources

- Salesforce CRM
Import objects from Salesforce CRM

Other Sources

Load a sample file in order to teach the system about your file's structure. At the end of this set up flow, you'll be able to specify where data should be retrieved from on an ongoing basis.

- Amazon S3
Retrieve a file from Amazon Simple Storage Service

MuleSoft Anypoint Exchange

Access these pre-built connectors and more from MuleSoft Anypoint Exchange. [Learn more](#)

Adobe Marketo Amazon DynamoDB Amazon EC2



New Data Stream

Configure your Amazon S3 source.

*S3 Bucket Name
Enter bucket name

*S3 Access Key
Enter access key

*S3 Secret Key
Enter secret key

File Details
*File Type
 CSV
 Parquet

Directory
File Name

Source Details
*Source
Search Source...

Previous Next



AWS: Create S3 Buckets for Ingesting/Activating Data



Salesforce

aws Services Search [Option+S] Singapore crosscloudretailworkshop

Amazon S3 X

Amazon S3 > Buckets > ravg-spring24-gaj > ecommerce-data/

ecommerce-data/

Copy S3 URI

Objects Properties

Objects (3) Info

Copy S3 URI Copy URL Download Open Delete Actions Create folder Upload

Find objects by prefix

Objects are the fundamental entities stored in Amazon S3. You can use [Amazon S3 inventory](#) to get a list of all objects in your bucket. For others to access your objects, you'll need to explicitly grant them permissions. [Learn more](#)

<input type="checkbox"/>	Name	Type	Last modified	Size	Storage class
<input type="checkbox"/>	S3 Customer Profile.csv	csv	June 23, 2024, 17:57:46 (UTC+05:30)	9.7 KB	Standard
<input type="checkbox"/>	S3 Order Headers.csv	csv	June 23, 2024, 17:57:47 (UTC+05:30)	22.7 KB	Standard
<input type="checkbox"/>	S3 Order Line Items.csv	csv	June 23, 2024, 17:57:47 (UTC+05:30)	35.3 KB	Standard

Block Public Access settings for this account

Storage Lens

- Dashboards
- Storage Lens groups
- AWS Organizations settings

Feature spotlight 7

AWS Marketplace for S3

S3 Bucket Permissions



Bucket permissions required
for ingestion:

- GetBucketLocation
- GetObject
- ListBucket

Bucket permissions required
for activation:

- DeleteObject
- GetBucketLocation
- GetObject
- ListBucket
- PutObject





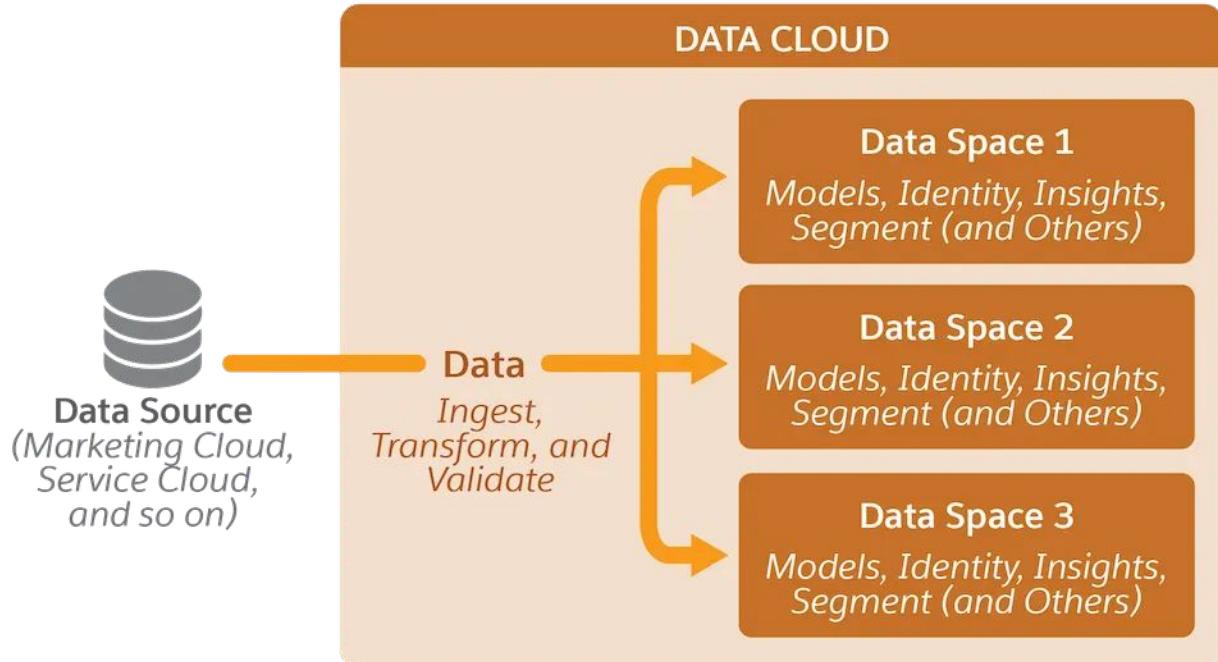
Data Spaces



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

Cross brand/region data unification is the main scenario

Data Spaces are NOT a Data residency solution





Data Ingestion & Modelling (20%)



Let's walk through how this works

A “day in the life” of customer data



Data Sources

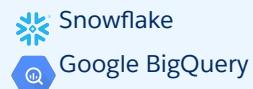
Customer 360



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

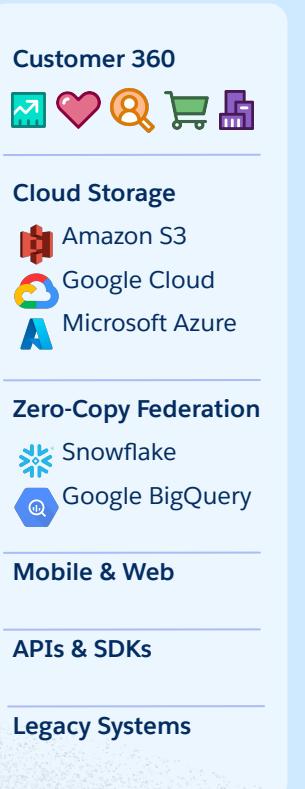


Let's walk through how this works

A “day in the life” of customer data



Data Sources



Let's walk through how this works

A “day in the life” of customer data

Data Sources

Customer 360



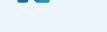
Cloud Storage



Google Cloud



Microsoft Azure



Zero-Copy Federation



Google BigQuery



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

Volume

How much data do I need?
How far back do I go?

Velocity

How quickly do I need the data?
What do my use cases require?

Veracity

How accurate is this data?
Is it ready for ingestion?

Value

Is there a true business need
that is driving this data?

Variety

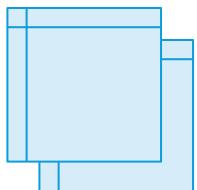
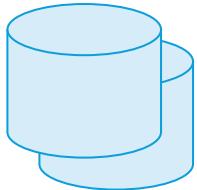
Should I go with a system of
record vs a data lake? What are
my tradeoffs?

Data Ingestion Flow Overview

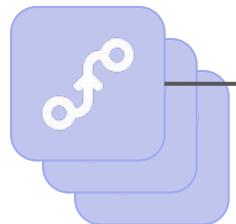


Data Streams:

Entities that can be extracted from a variety of Data Source Systems where data resides (e.g. CRM, SFMC, etc.)



Data Source Objects (DSOs):
Original, ingested data.



Data Spaces:

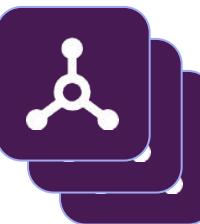
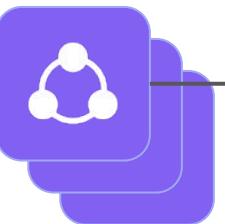
Partitions of your prepared data and its utilized components

Formulas

Ways to perform minor adjustments at the time of ingestion

Bulk / Streaming Transformation

Ways to perform major joins / filters / transformations on DLOs



Data Lake Objects (DLOs):
Data that's been formatted, transformed, categorized, & typed

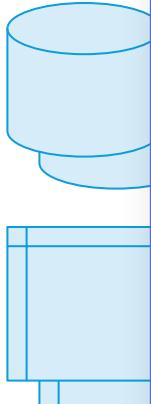
Data Model Objects (DMOs):
A conceptual object that references data from mapped DLOs.
Much like a view.

Data Ingestion Flow Overview



Data Stream

Entities that are extracted from a Data Source System where data resides (e.g. CRM, SFM)

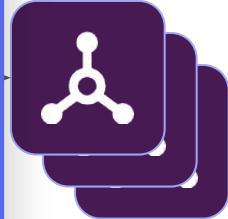


Woah, wait a second! Did you catch that?

DMOs do not contain copies of your data.

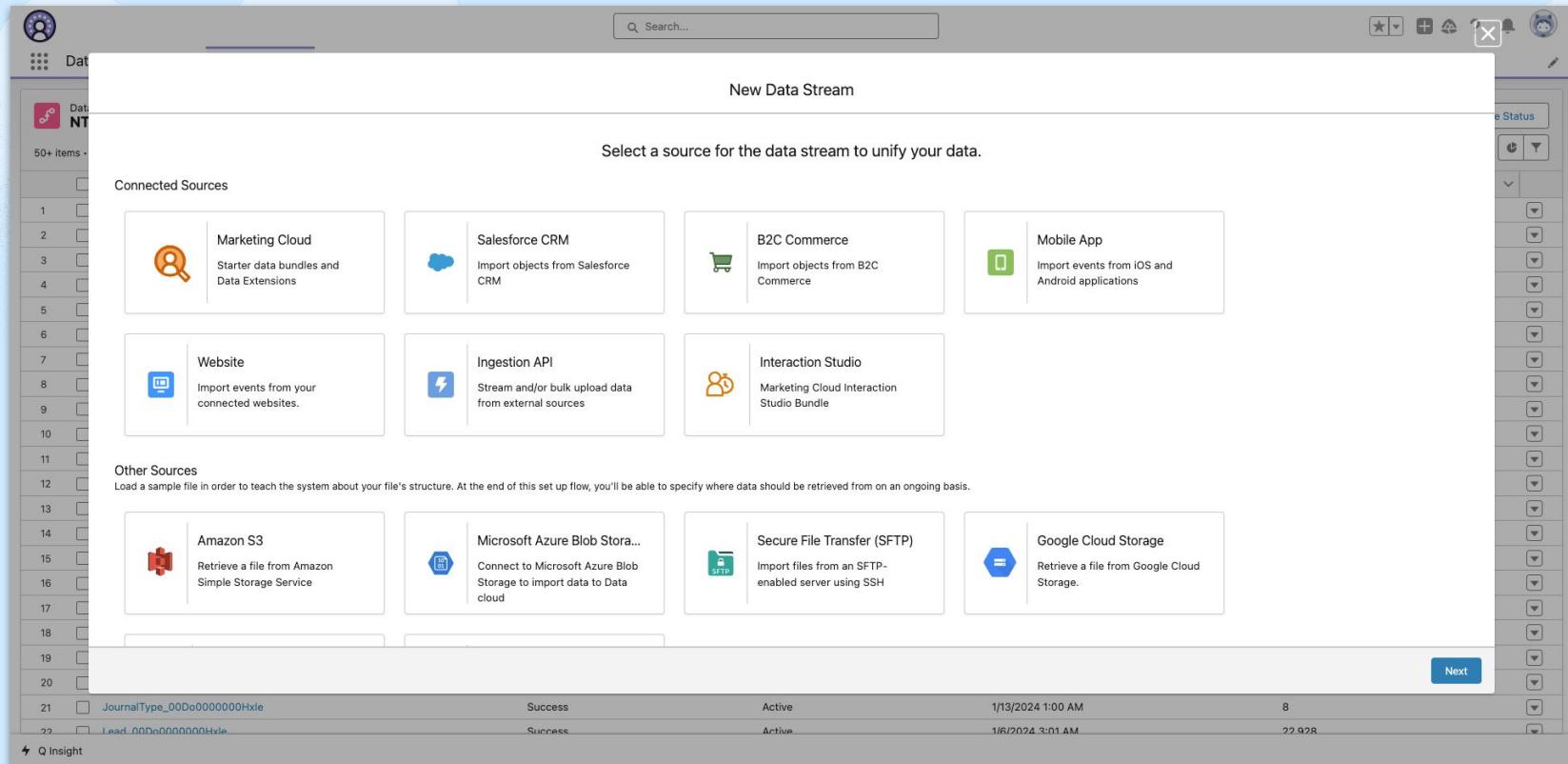
A DMOs are simply pointers (views) to the DLOs that contain the actual data.

*let's ignore the fact that curated DMOs exist right now because they aren't a typical representation of DMO principles



Data Model Objects (DMOs): conceptual objects that reference data from mapped DLOs. Much like a view.

Out-of-the-Box Connectors



New Data Stream

Select a source for the data stream to unify your data.

Connected Sources

- Marketing Cloud: Starter data bundles and Data Extensions
- Salesforce CRM: Import objects from Salesforce CRM
- B2C Commerce: Import objects from B2C Commerce
- Mobile App: Import events from iOS and Android applications
- Website: Import events from your connected websites.
- Ingestion API: Stream and/or bulk upload data from external sources
- Interaction Studio: Marketing Cloud Interaction Studio Bundle

Other Sources

Load a sample file in order to teach the system about your file's structure. At the end of this set up flow, you'll be able to specify where data should be retrieved from on an ongoing basis.

- Amazon S3: Retrieve a file from Amazon Simple Storage Service
- Microsoft Azure Blob Storage: Connect to Microsoft Azure Blob Storage to import data to Data cloud
- Secure File Transfer (SFTP): Import files from an SFTP-enabled server using SSH
- Google Cloud Storage: Retrieve a file from Google Cloud Storage.

Next

ID	Object	Status	Last Run	Run Count	
21	JournalType_00Do0000000Hxle	Success	Active	1/13/2024 1:00 AM	8
22	Lead_00D0000000Hyle	Success	Active	1/13/2024 3:01 AM	22,928

Q Insight

Reduce the amount of custom integrations and maintenance preventing marketing teams from using data in campaigns. Ingest and combine customer data with native connectivity to Salesforce apps (Marketing, Sales, Service, Commerce), pre-built integrations to cloud storage like Amazon S3, and the ability to connect to any system with MuleSoft.

Bundles

Speed up the ingestion process by including a standard list of objects, fields, with pre-built mappings to Data Cloud DMOs.

Data Cloud Connectors



Source	Connector Functionality	Features	Use Cases
CRM	<ul style="list-style-type: none">Ingest data from CRM in a few clicks through Pre-Made Bundles mapped to Data Cloud's Data Model	<ul style="list-style-type: none">Seamless Native Integration with Salesforce Proprietary APIs	<ul style="list-style-type: none">Ingest Accounts, Case, Leads, Loyalty data for segmentation.Single repository of Data across CRM & Other sources for BI
Marketing Cloud	<ul style="list-style-type: none">Ingest Data from any data extension in MC in a few clicks and any channel related data like Opens, Clicks, Bounce etc.	<ul style="list-style-type: none">Native Integration with Marketing Cloud to bring in any MC data into Data Cloud	<ul style="list-style-type: none">Ingest Email Open, Click data to identify top engagers for segmentationSurface Marketing Insights to CRM Agents
B2C Commerce Cloud	<ul style="list-style-type: none">Ingest Commerce Cloud Order Data and Related Customer and Catalog Data with OOTB Connector	<ul style="list-style-type: none">Native Integration with Marketing Cloud to bring in any Commerce data into Data Cloud	<ul style="list-style-type: none">Unify Online data from Commerce with Offline data coming from other sources to understand lifetime value of the customer.Leverage Order Data to create affinities based on previous purchasing patterns within Data Cloud

Source	Connector Functionality	Features	Use Cases
Web SDK	<ul style="list-style-type: none"> SDK/Tag to capture real-time customer events from the brand's website 	<ul style="list-style-type: none"> Unified SDK with Personalization allows Data Collection and Actionability using same tag 	<ul style="list-style-type: none"> Collect Real-Time Web Behaviour - Views, Clicks, Add to Cart, Form Submission, Watch Video etc Trigger actions based on real-time behavior on any channel - Email, SMS, Push, Sales/Service Events, External Webhooks, Slack Message, Stream to Warehouse & more
Mobile SDK	<ul style="list-style-type: none"> Mobile SDK to capture all mobile transactions, behaviors, and other events. 	<ul style="list-style-type: none"> Unified SDK with Marketing Cloud allows same SDK to capture mobile events as well as trigger personalized push, in-app messages and more Fully Integrated with Journey Builder to trigger omni-channel journeys 	<ul style="list-style-type: none"> Collect Real-Time Mobile Behaviour - Views, Clicks, Add to Cart, Form Submission, Watch Video etc Trigger actions based on real-time behavior on any channel - Email, SMS, Push, Sales/Service Events, External Webhooks, Slack Message, Stream to Warehouse & more
APIs	<ul style="list-style-type: none"> Streaming and Bulk APIs Send data from any application to Data Cloud 	<ul style="list-style-type: none"> Easily Configurable Schema Designed for High Scale, High Velocity Packaging support for re-usability 	<ul style="list-style-type: none"> Ingest Real-Time POS data from Store Ingest Weather Updates Ingest Loyalty Data Ingest External Data Sources from any system



Source	Connector Functionality	Features	Use Cases
Personalization	<ul style="list-style-type: none">All types of events are ingested in few clicks.Ingest anonymous and known data.	<ul style="list-style-type: none">Native Connector with Personalization Engine to streamline Data collection and Personalization.	<ul style="list-style-type: none">Build affinities within Data Cloud using Calculated Insights based on raw data from Personalization
Cloud File Storage (S3, GCS, Azure)	<ul style="list-style-type: none">Ingest data from any system via cloud storage bucketsImport data stored on public cloud seamlessly	<ul style="list-style-type: none">Automatic delimiter, data type, and date time pattern detectionWildcard match to accommodate date-stamped or otherwise changing file namesHigh water mark tracking to allow only reading new filesCompressed with Zip and GZ compression standards	<ul style="list-style-type: none">Ingest any and all external data sources in bulk.
Mulesoft	<ul style="list-style-type: none">Native Integration with Mulesoft to ingest data using Streaming and Bulk APIs	<ul style="list-style-type: none">Mulesoft opens an ecosystem of 300+ OOTB Native Connectors	<ul style="list-style-type: none">Ingest data from legacy systemsIngest data from External systems like POS, OMS, Snowflake, Azure and other connectors for which Data Cloud does not have ootb approach

Data Ingestion Timings



Connectors	Historical Load	Latency	Refresh Mode
Marketing Cloud	90 days	Hourly Deltas / 24 Hour Refresh	Upsert or Full Refresh
Salesforce CRM	All	10 minutes	Upsert
		Bi-weekly	Full Refresh
Cloud File Storage (S3, GCS, Azure)	None	5 minutes	Upsert or Full Refresh
B2C Commerce	30 days	Sales Order and Sales Order Customer - Hourly Others - Daily	Sales Order - Upsert All others - Full Refresh
Marketing Cloud Personalization	None	Profile - 15 minutes Events/Engagement - 2 mins	Users - Upsert All others - Insert
Ingestion API (Batch and Streaming)	None	15 minutes	Upsert
Web and Mobile SDK	None	User Profiles - Hourly Engagement - 15 minutes	
Mulesoft (using Ingestion API)	None	15 Minutes	



Data Object Type Categories



Profile

Segment-oriented data set.

A data set which contains any population you wish to segment by, or use as the starting population for a segment.



Engagement

Time-series oriented data set.

An Event Time field must be defined as part of set-up. The date field chosen for Event Time should be immutable otherwise records will be duplicated.



Other

Data sets which are related to Profile or Engagement data.

Time-series data sets which do not have an immutable date field.



Data Field Types



Text

Stores any kind of text data. It can contain both single-byte and multibyte characters that the locale supports.

Zero length strings ("") and no value are treated as empty strings.

Number

Stores numbers with a fixed scale of 18 and precision of 38.

Scale represents the number of fractional digits. Precision represents the count of digits, regardless of the location of the decimal point.

Date

Holds the calendar date without a time part or time zone.

If the incoming data record includes a time part for a field configured as type date, the time part is ignored.

DateTime

Stores an instant in time expressed as a calendar date and time of day.

A valid datetime must include the time part and time zone (following ISO-8601 standard). If time part and time zone are not included, it's inferred as 00:00:00 UTC.

See the [full list of expressions](#) by field type.

Data Field Types

Added February 2024



Email

Stores email addresses. The email data type is modeled on the text data type. You can use any valid text value for ingestion into an email data type field. Data Cloud doesn't validate the format.

Phone

Stores phone numbers. Data Cloud doesn't validate the format of the phone number. The phone data type is modeled on the text data type. Any valid text value is accepted for ingestion into a phone data type field.

URL

Stores URL values. Data Cloud doesn't parse or interpret the ingested URL value. It also doesn't validate the value for correctness. Data Cloud doesn't store any metadata related to the URL.

Percent

Holds percentage values. The percent data type is modeled on the number data type. Only valid numeric values are accepted for ingestion into a percent data type field.

Boolean

Possible values are 'true', 'false', and blank. Fields with boolean data type can't be used as primary keys, record modified fields, and internal organization fields.

See the [full list of expressions](#) by field type.



Data Transformation

Formulas & Data Transformations



Formulas



Leverage Formula Fields to Enhance or Enrich Source Data for Mapping

Primary Keys

Create needed primary keys for mapping.

Transformation Formula

```
CONCAT('SFMC_523008784_', sourceField['Email'])
```

Consider functions like CONCAT()

Set Picklist-type Values

Create fields that bucket values to simplify segmentation.

Transformation Formula

```
IF(sourceField['Spend']>=1000,'Platinum',
IF(AND(sourceField['Spend']<1000,
sourceField['Spend']>='500),'Gold',
IF(sourceField['Spend']<'500,'Silver','Unknown')))
```

Consider functions like IF(), AND(), or NOT()

Standardization

Ensure consistent data formatting for activation.

Transformation Formula

```
PROPER(sourceField['First_Name'])
```

Consider functions like PROPER() or REPLACE()

Transform Data Sources with Formula Fields

Supplemental fields can be hard-coded or derived from other fields in the data stream.

Formulas



Leverage Formula Fields to Enhance or Enrich Source Data for Mapping

Primary Keys

Create needed mapping.

Transformation Formulas

```
CONCAT('SFMC_5230',
```

Consider func



Woah, wait a second! Did you catch that?

**Formulas are only applied
when data is ingested.**

You cannot apply a formula to data that's already been ingested.

Supplemental

data
vation.

Formula

```
'First_Name'])
```

ke PROPER() or
E()

Transforming Data Sources With Formula Fields

Supplemental fields can be hard-coded or derived from other fields in the data stream.

Data Transforms



Adjust your data to suit your model or use case

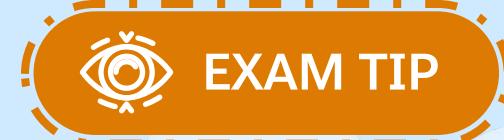
Common use cases:

- Splitting records
- Performing Aggregations
- Joining data sources
- Exploding / Collapsing Data Arrays

Id	Business Email	Personal Email
001	astro@salesforce.com	chill.astro@gmail.com
002	codey@salesforce.com	drippybear123@hotmail.com
003	appy@salesforce.com	project2501@yahoo.com



Party	Email
001	astro@salesforce.com
001	chill.astro@gmail.com
002	codey@salesforce.com
002	drippybear123@hotmail.com
003	appy@salesforce.com
003	project2501@yahoo.com



Batch Transforms

- Does a full refresh
- Repeatable process, can be scheduled or triggered manually
- Works with DLOs or DMOs as source objects
- Does not replace Calculated Insights

Streaming Transforms

- Acts on one row of data at a time
- Transforms data as it's ingested
- Works only with DLOs
- Does not replace Calculated Insights

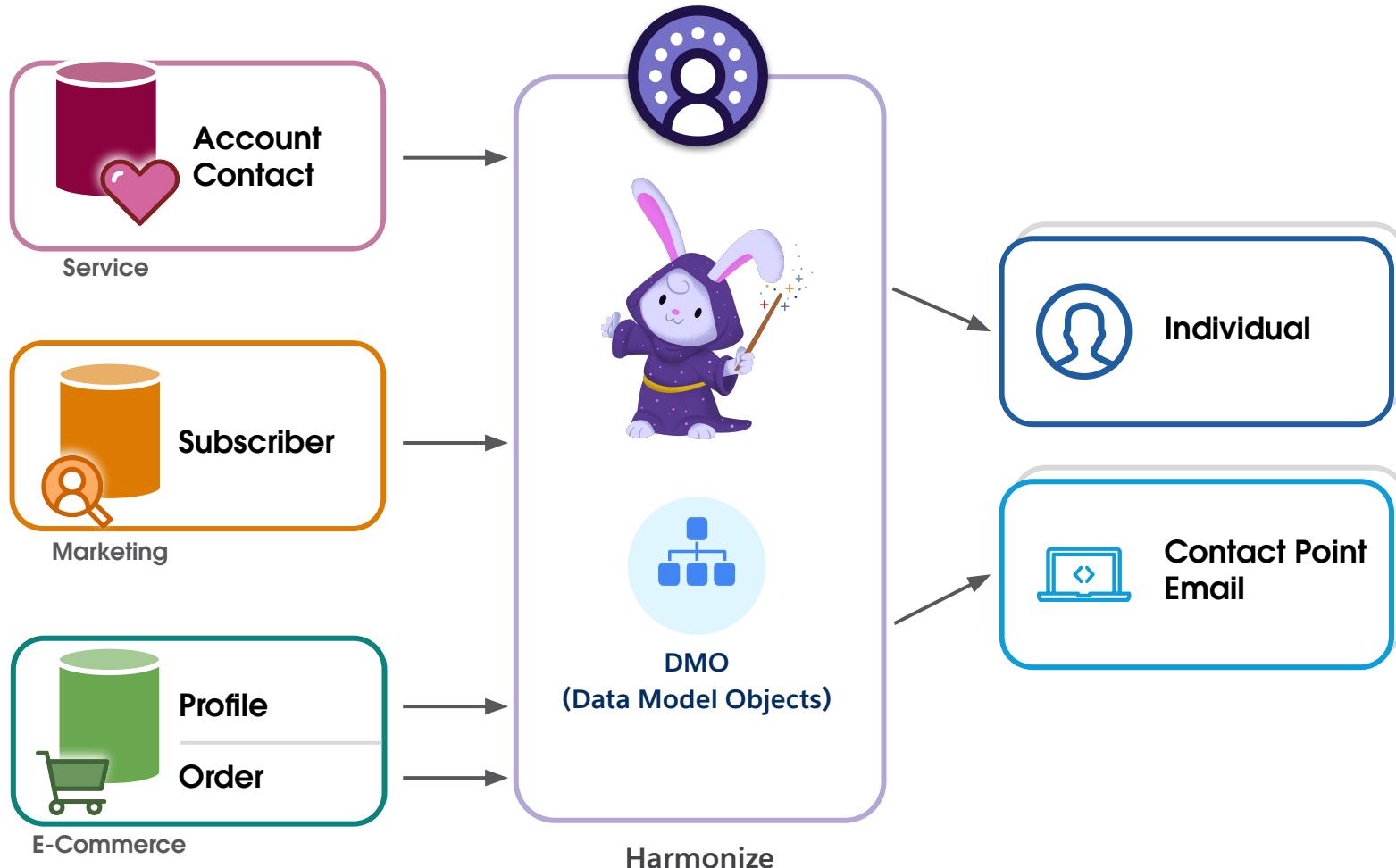
Harmonization



Data Cloud's Harmonization is like a *Universal Translator* for your multiple Data Languages



Translate your System of Record Objects & Fields into a Common Data Model



1 Systems Master Data Differently
Contact, Subscriber, Profile and Order all contain some PII that represents an Individual

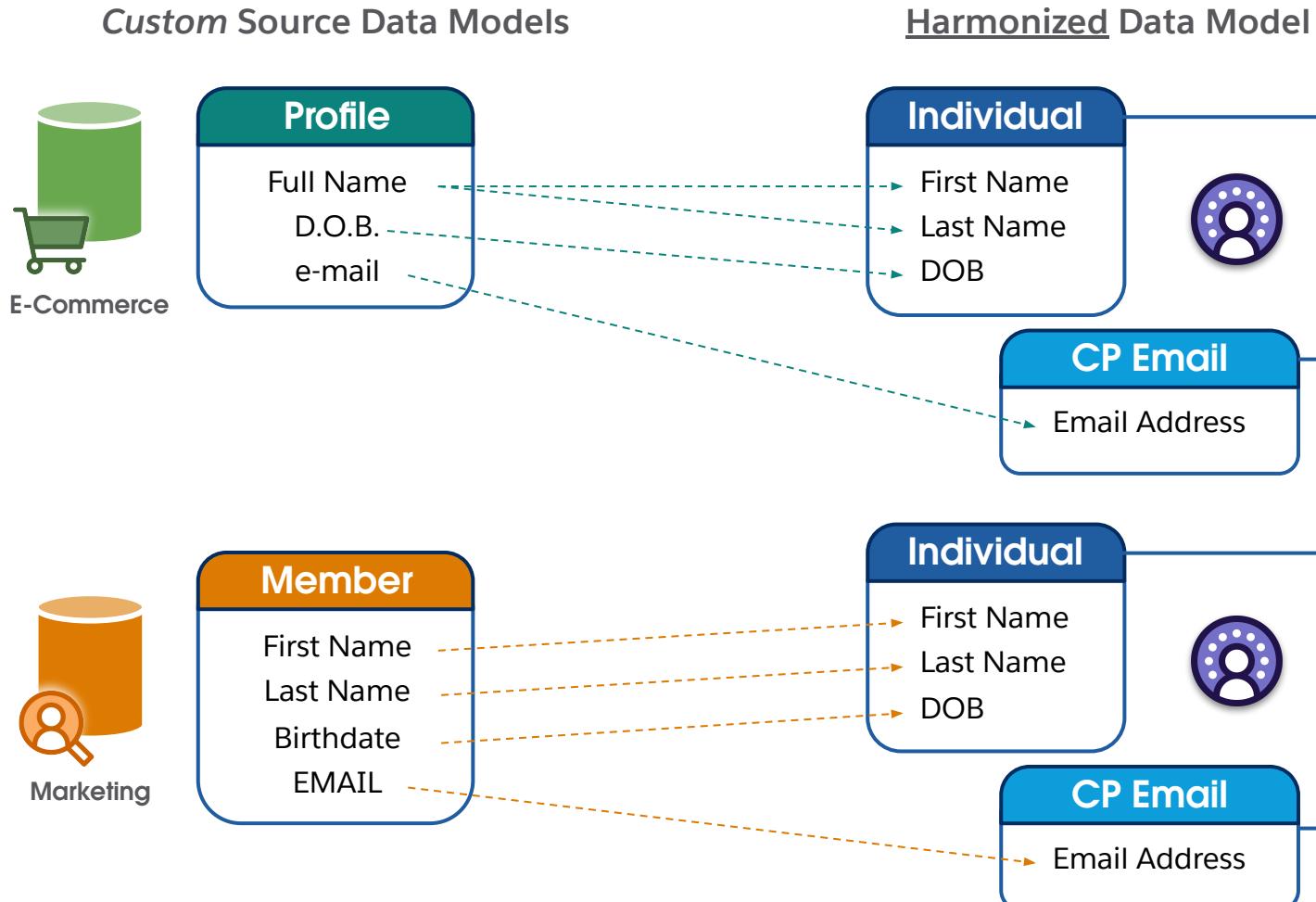
2 Data Cloud DMOs
Data Cloud comes OOTB with many Standard Data Model Objects & ability to create Custom

3 Harmonize by Mapping
Try to use consistent DMOs and fields when setting up Data Cloud for greater insights

Data Cloud's Harmonization is like a *Universal Translator*



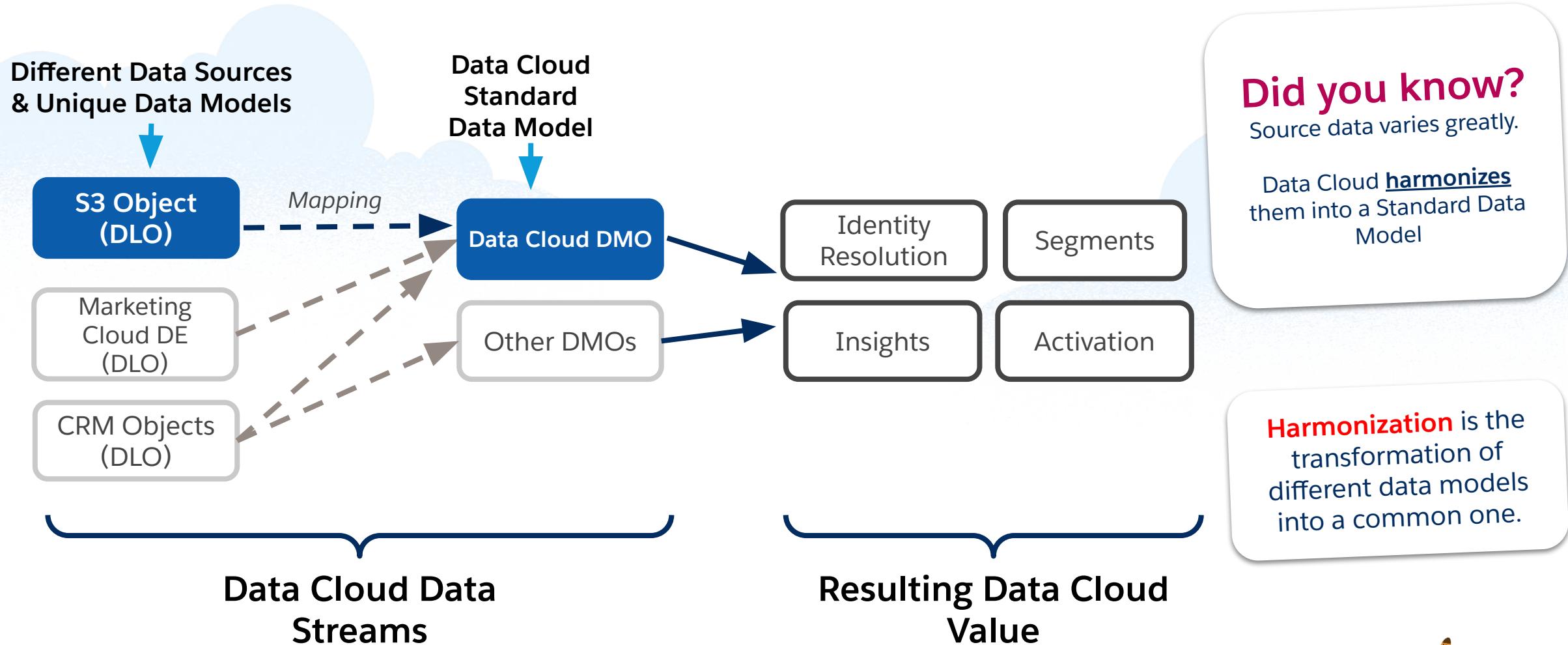
Let's look at this with Objects + Fields...



Single View of your Customer

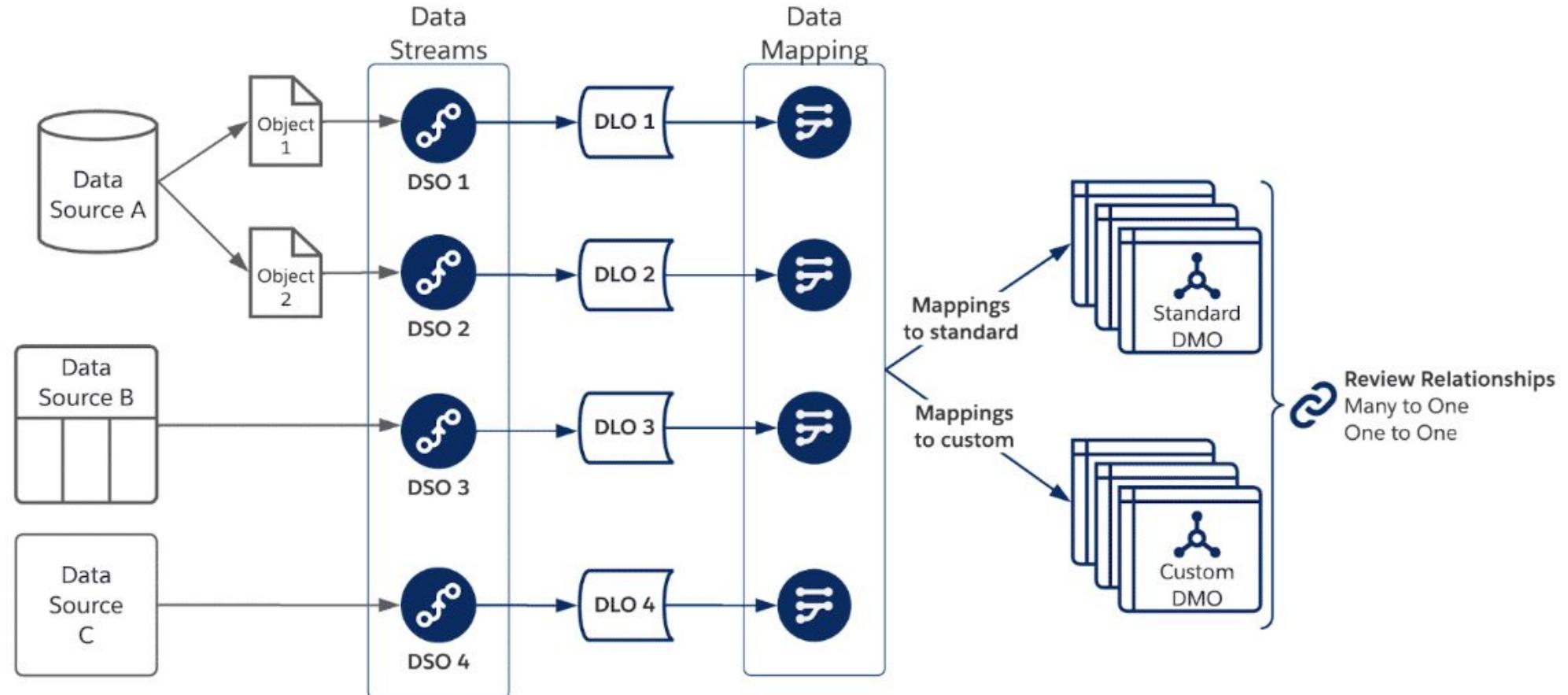
- This **enables Identity Resolution**, & creation of the Unified Profile
- Makes it possible to **find relationships between distributed customer data** from all of your systems of record
- Standardized naming conventions, field formats and relationships **provide consistency across all Data Cloud-connected data sources**
- Enables cross-data source **calculated insights** and provides foundation for **BI analyses**

Data Ingestion & Data Mapping are Distinct Steps



Data Modeling

End-to-End Sequence





Modeling Walkthrough

Example



Two Physical Objects, One Semantic Object



Source: Web Orders

Object: Web_Sales_Order_Header

OrderID	CustomerID	Purchase_Date	Purchase_Channel	Store_ID	Delivery_Method	Shipping_Date	Number_of_Items	Total_Amount
36058	101460170	2/21/2015 0:00	Online		Pickup	2/21/2015 0:00	1	117.7
36059	100520855	2/21/2015 0:00	Online		Shipping	2/23/2015 0:00	1	40.13
36060	101270958	2/21/2015 0:00	In-Store		Pickup	2/21/2015 0:00	1	324.21
36061	100100390	2/21/2015 0:00	Online		Shipping	2/23/2015 0:00	2	245.56
36062	100240389	2/21/2015 0:00	Online		Shipping	2/23/2015 0:00	2	110.42

Source: Offline Sales

Object: Offline_Sales_Order_Header

Order Number	Customer	Date of Purchase	Items Count	Total
36071	100140252	2/21/2015 0:00	2	331.7
36072	100840779	2/21/2015 0:00	2	204.37
36073	100060584	2/21/2015 0:00	2	95.23
36074	100130910	2/21/2015 0:00	1	64.2
36075	100440394	2/21/2015 0:00	2	92.29



Two Physical Objects, One Semantic Object



Source: Web Orders

Object: Web_Sales_Order_Header

OrderID	CustomerID	Purchase_Date	Delivery_Method	Shipping_Date	Number_of_Items	Total_Amount
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36059	100520855	2/21/2015 0:00	Shipping	2/23/2015 0:00	1	40.13
36060	101270958	2/21/2015 0:00	Pickup	2/21/2015 0:00	1	324.21
36061	100100390	2/21/2015 0:00	Shipping	2/23/2015 0:00	2	245.56
36062	100240389	2/21/2015 0:00	Shipping	2/23/2015 0:00	2	110.42

Source: Offline Sales

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36071	100140252	2/21/2015 0:00	1	2	331.7
36072	100840779	2/21/2015 0:00	2	2	204.37
36073	100060584	2/21/2015 0:00	3	2	95.23
36074	100130910	2/21/2015 0:00	4	1	64.2
36075	100440394	2/21/2015 0:00	5	2	92.29



Harmonize Data Source Objects into Data Model Object



The **web sales order** data set and the **offline sales order** data set both align well with the **sales order** data model object.

- In some cases both data sets have fields that map to the same data model attribute
- In other cases only a single data set maps to a data model attribute.

Data Lake Object Fields	Data Model Object Fields
Web_Sales_Order_Header.OrderID Offline_Sales_Order_Header.Order_Number	SalesOrder.Id
Web_Sales_Order_Header.CustomerID Offline_Sales_Order.Customer	SalesOrder.SoldtoCustomer
Web_Sales_Order_Header.Purchase_Date Offline_Sales_OrderHeader.Date_of_Purchase	SalesOrder.PurchaseOrderDate
Offline_Sales_OrderHeader.Store_ID	SalesOrder.SalesStore
Web_Sales_Order_Header.Total_Amount Offline_Sales_OrderHeader.Total	SalesOrder.GrandTotalAmount



Explore Raw Data to Determine Object Relationships



- OrderID is the common thread, or foreign key, between the two data sets
 - Looking at Web_Sales_Order_Header, we see the list of OrderIDs is unique (no repeats)
- Looking at Web_Sales_Order_Details, we see the list of OrderIDs is not unique.
 - Multiple instances of 36061 and 36062
 - More than one SKU in the order
- We can conclude that *Web_Sales_Order_Details* is **Many:1** with *Web_Sales_Order_Header*

Web_Sales_Order_Header

OrderID	CustomerID	Purchase_Date	Purchase_Channel	Store_ID	Delivery_Method	Shipping_Date	Number_of_Items	Total_Amount
36058	101460170	2/21/2015 0:00	Online		Pickup	2/21/2015 0:00	1	117.7
36059	100520855	2/21/2015 0:00	Online		Shipping	2/23/2015 0:00	1	40.13
36060	101270958	2/21/2015 0:00	In-Store		Pickup	2/21/2015 0:00	1	324.21
36061	100100390	2/21/2015 0:00	Online		Shipping	2/23/2015 0:00	2	245.56
36062	100240389	2/21/2015 0:00	Online		Shipping	2/23/2015 0:00	2	110.42

Web_Sales_Order_Details

OrderID	CustomerID	SKU	Quantity	Unit_Price	Discount	Subtotal
36058	101460170	101115	1	110	0	110
36059	100520855	102155	1	75	50	37.5
36060	101270958	104177	1	303	0	303
36061	100100390	101129	1	70	15	59.5
36061	100100390	103210	1	170	0	170
36062	100240389	103205	1	24	0	24
36062	100240389	103213	1	99	20	79.2





Assign Object Relationships in the Data Model

Understand the relationships between objects in the raw data

- Set these **relationships** accordingly in the data model layer
- Relationships are defined in the UI based on Data Model fields
- Allows multiple data sources power the same data model object

Relationship when applied to Data Model Object

Sales_Order_Product

SalesOrder

N:1

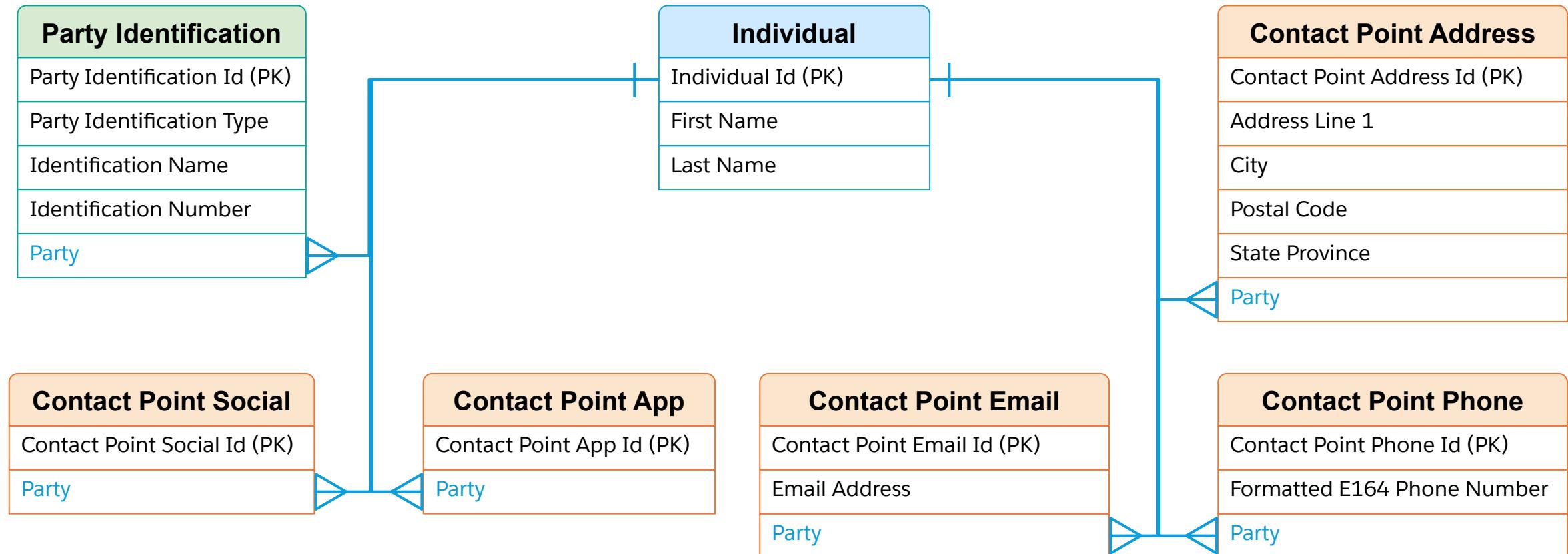
SalesOrder

Id



Required Mappings

These Objects Enable Unification and Activation Processes



Common Entities To Know

Not a comprehensive list, rather some of the commonly used entities



Engagement Subject Area

- Device Application Engagement
- Email Engagement
- Engagement Topic
- Product Browse Engagement
- Product Order Engagement
- Shopping Cart Engagement
- SMS Engagement
- Website Engagement



Sales Order Subject Area

- Sales Order
- Sales Order Product
- Sales Store
- Order Delivery Method



Product Subject Area

- Brand
- Goods Product
- Product Catalog
- Product Category



Privacy Subject Area

- Party Consent
- Contact Point Consent
- Communication Subscription Consent
- Engagement Channel Type Consent



Loyalty Subject Area

- Loyalty Program
- Loyalty Program Member
- Loyalty Tier
- Promotion
- Voucher

Look for **Customer 360 Data Model** references on
<https://architect.salesforce.com/diagrams#template-gallery>





Data Ethics & Privacy

Example





Data Subjects Rights

- **Data Deletion or Right To Be Forgotten:** Indicates the right to be forgotten, which means delete PII (Personally Identifiable Information) data and any related records.
- **Processing or Restriction of Processing:** Restricts processing of data in Data Cloud processes such as query and segmentation.
- **Data Access and Export:** Used to allow export of Data Cloud profile data.

Requesting Data Deletion

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

Demo

Data Ingestion & Modeling





Intro to Hands-on Exercises (Optional)



Data Cloud Learning Journey

Learning Journey Details
sfdc.co/DCCurriculum



[Data Cloud Pocket Guide](#)

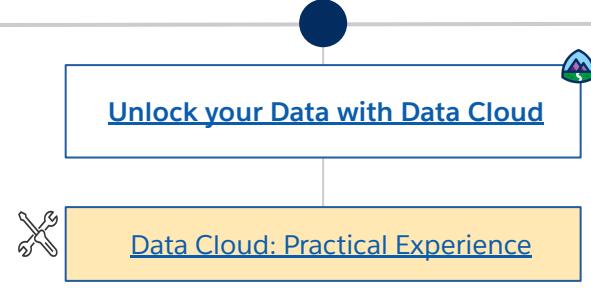
START
HERE



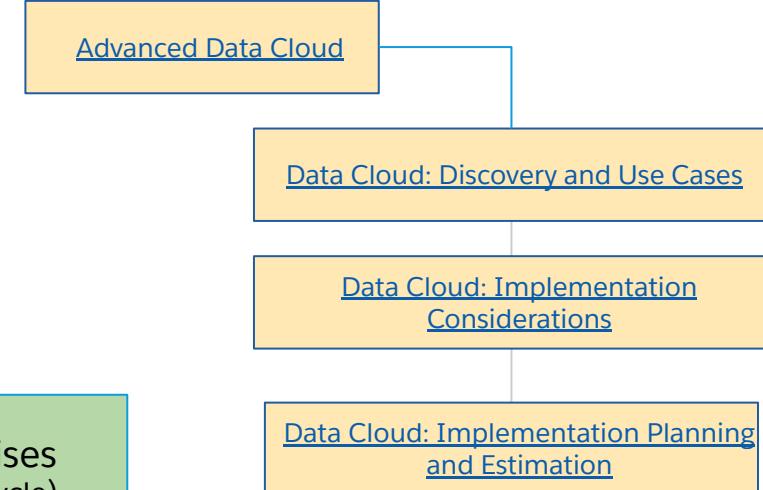
[Get Started with Salesforce CRM](#)



Begin Your Data Cloud Learning Journey



Advance Your Data Cloud Learning Journey



15 hands-on exercises
(Entire Data Cloud Lifecycle)

LEGEND

Learning Content

Business/Non-Technical
Product/Technical

Learning Tracks



Available

Blue Text

Partner Only

Yellow Box

Badge /
Credential



CERTIFIED
Associate

Hands-On



Data Cloud Trial Org

- Data Cloud Trial Org available via Partner Learning Camp (**Demo Org Tab**)
- Demo Type **DCDO** (Data Cloud Demo Org)
- Use with Data Cloud: Practical Experience Course

The screenshot shows a web page from the "Partner Learning Camp" website. At the top, there's a navigation bar with links for Home, Browse Catalog, Demo Org, Profile, Events, and Credentials. On the right side of the header, there are icons for notifications and user profile.

The main content area has a heading "Would you like to get your hands on our entire platform and see how fast you can build robust, secure, scalable apps for demos for customers, and power them with data from any source? The Simple Demo Org (SDO), Industry Demo Orgs (IDOs), and the Smartbytes Demo Org all give you the features and data you need to start showcasing the technology that quickly demonstrates value and closes deals. Powerful tools and add-ons can be used to make the demo org a compelling part of your pre-sales engagement. Please ensure you have gone through the "Fundamentals" training for the org on Partner Learning Camp prior to using it."

Below this, there's a section titled "Partner Sign-up for a DCDO Demo Org" with a sub-section about the Data Cloud Demo Org (DCDO) and its rules of engagement. It includes a link to the rules of engagement page: <https://sfdc.co/dctrialorgrope>.

On the right side of the page, there's a form for signing up:

- *Demo Type: DCDO
- First Name: Arvind
- Last Name: Raman
- Email Address: arvindraman@salesforce.com
- Company: Salesforce.Com Inc - Partner logins *
- *Username: arvindraman.ddco.Dec2023@salesforce.com
- Usernames must be unique and in the form of an email address.
- I have read and agreed to the Master Subscription Agreement

At the bottom right of the form is a "Submit" button.



Knowledge Check



Knowledge Check



Question 1:

What is an appropriate capability of Data Cloud?

1. Uniform, operable view of unified data
2. Enterprise backup and disaster recovery
3. Multi-system integration platform for APIs



Knowledge Check



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What is an appropriate capability of Data Cloud?

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Knowledge Check



Question 2:

Which standard permission sets enable generation of segments and activation of data in Data Cloud?

1. Data Cloud User & Data Aware Specialist
2. Data Cloud for Marketing Admin & Data Cloud for Marketing Manager
3. Data Cloud Admin & Data Cloud Data Aware Specialist



Knowledge Check - Answer



Question 2:

Which standard permission sets enable generation of segments and activation of data in Data Cloud?

1. Data Cloud User & Data Aware Specialist
2. **Data Cloud for Marketing Admin & Data Cloud for Marketing Manager**
3. Data Cloud Admin & Data Cloud Data Aware Specialist



Knowledge Check



Question 3:

What object permissions are required to enable data ingestion from Salesforce CRM?

1. Read & View All
2. Modify All & View All
3. Read & Edit

Knowledge Check Answer



Question 3:

What object permissions are required to enable data ingestion from Salesforce CRM?

1. **Read & View All**
2. Modify All & View All
3. Read & Edit



Knowledge Check



Question 4:

Which is a data set available to be ingested using a Marketing Cloud Starter Bundle?

1. Data Extensions
2. System Data Views
3. Email Studio

Knowledge Check - Answer



Question 4:

Which is a data set available to be ingested using a Marketing Cloud Starter Bundle?

1. Data Extensions
2. System Data Views
3. **Email Studio**



Knowledge Check



Question 5:

Data cloud is a: _____

1. Data Lake
2. Data Lakehouse
3. Data Warehouse



Knowledge Check - Answer



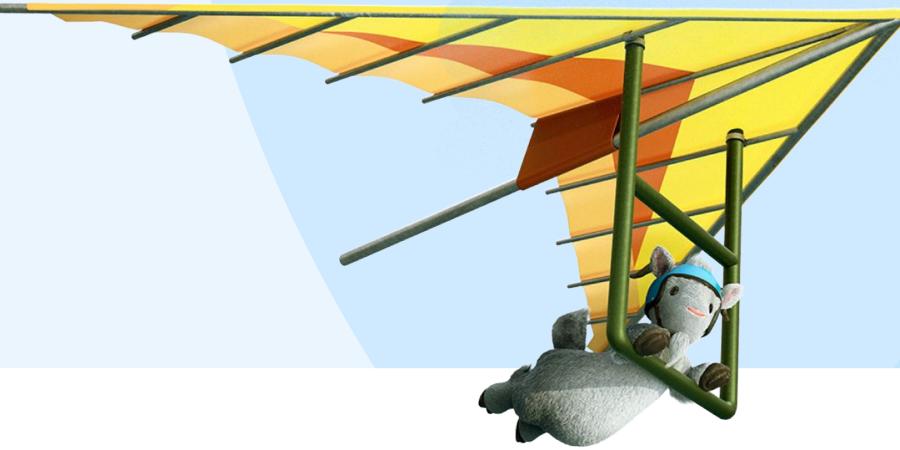
Question 5:

Data cloud is a: _____

1. Data Lake
2. **Data Lakehouse**
3. Data Warehouse



Knowledge Check



Question 6:

True or False: you can have multiple active connections to the same starter bundle.

1. True
2. False

Knowledge Check - Answer



Question 6:

True or False: you can have multiple active connections to the same starter bundle.

1. True
2. False

Knowledge Check



Question 7:

What is NOT a limitation of formula fields applied to ingested data?

1. They can only be applied to text-based field types
2. They can only be applied the first time new rows are ingested
3. They can only be applied to a single row of data at a time



Knowledge Check - Answer



Question 7:

What is NOT a limitation of formula fields applied to ingested data?

1. **They can only be applied to text-based field types**
2. They can only be applied the first time new rows are ingested
3. They can only be applied to a single row of data at a time



Knowledge Check



Question 8:

Which Data Object Type Category would you use to ingest Sales Orders?

1. Profile
2. Engagement
3. Other

Knowledge Check - Answer



Question 8:

Which Data Object Type Category would you use to ingest Sales Orders?

1. Profile
2. Engagement
3. Other



Knowledge Check



Question 9:

You can extend the Customer 360 Data Model with _____

1. only custom fields
2. only custom objects
3. both custom objects and custom fields



Knowledge Check - Answer



Question 9:

You can extend the Customer 360 Data Model with _____

1. only custom fields
2. only custom objects
3. **both custom objects and custom fields**



Knowledge Check



Question 10:

Which DMO provides ways to identify individuals and accounts by attributes such as driver's license numbers or customer IDs?

1. Party Identification
2. Unified Individual
3. Segment Membership

Knowledge Check - Answer



Question 10:

Which DMO provides ways to identify individuals and accounts by attributes, such as driver's license numbers or customer IDs?

1. **Party Identification**
2. Unified Individual
3. Segment Membership



Data Cloud Cert Prep Resources

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



Data Cloud Certification Preparation Resources

<http://sfdc.co/DCCertPrep>

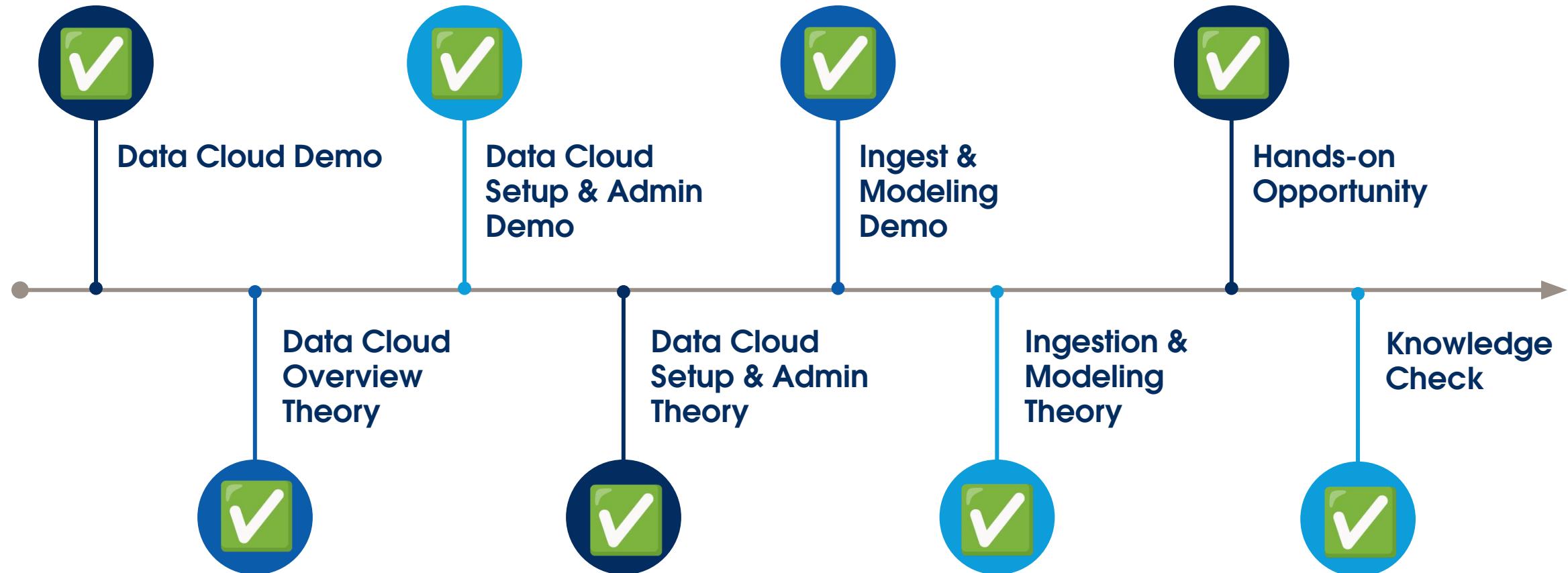
This program is a series of weekly learning cohorts designed to prepare you for taking the Data Cloud Consultant Certification exam. All details on this program including dates, registration links can be found here
<https://cloud.mail.salesforce.com/partnerdatacloud>

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

Resources

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

What have we accomplished today?



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





salesforce

Thank you

