Customer 360 Audiences Implementation Guide

Salesforce, Spring ’21

@salesforcedocs
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CONTENTS

WELCOME TO CUSTOMER 360 AUDIENCES

Customer 360 Audiences is a self-service customer data platform (CDP) where you can create personalized audience segments to power your marketing.

Who This Guide Is For

This guide is for admins, business users, developers, and partners to implement Customer 360 Audiences.

Before You Start

Before implementing Customer 360 Audiences ensure that you complete the following.

- Identify project stakeholders.
- Identify data sources.
  - Ensure that you have proper permissions and credentials to these data sources.
    - Marketing Cloud
    - Sales and Service Cloud
    - AWS (S3)
- Identify Customer 360 Audiences users.
  - List each user's role and their needed permission set.
- Document business requirements
  - Confirm your data and data model requirements (standard, custom, hybrid).
  - Determine identity resolution rules needs for creating unified profiles.

Customer 360 Audiences Prerequisites

- Marketing Cloud admin and admin roles assigned to your user in a Marketing Cloud Enterprise parent account.
  - Access to business units to obtain data
  - Access to business units to publish segment to
- Admin or owner permission to change write permissions on the AWS directory.

Document Goals

The goal of this implementation guide is to explain the steps to configure a Customer 360 Audiences org to begin using it for marketing segmentation.

This guide shows users how to:

- Prepare for implementation

- Configure Customer 360 Audiences
- Create profiles and users
- Connect data sources
- Ingest data through a cloud storage data stream
- Map data to a data model
- Create an activation channel
- Create a segment
- Activate and publish an audience segment

Customer 360 Audiences Use Case

Northern Trail Outfitters (NTO) is eager to use Customer 360 Audiences. They discuss the project and identify the following stakeholders and Customer 360 Audience users.

Let’s review each user and their responsibilities.

Marketing manager, Isabelle Givens—Manages the overall segmentation strategy and identifies the target campaigns. Isabelle also creates and maintains reports and dashboards, including the Customer 360 Audiences homepage dashboard.

Admin, Pia Larson—Responsible for the setup of the application, user provisioning, and assigning permission sets within the system. Pia has access to Salesforce Sales and Service Clouds in addition to other integrated systems within the core cloud platform. The admin executes day-to-day configuration, support, maintenance and improvement, and performs regular internal system audits.

Data-aware specialist, Warren Mehta—Manages the data model defined by the marketing manager and marketing specialist. Warren creates and manages data streams and harmonizes those data streams into a cohesive data model to be used to build effective segments.

Marketing specialist, Michele Hansley—execution focused role responsible for creating, managing, and publishing segments as directed by Isabelle, the marketing manager.

NTO Requirements

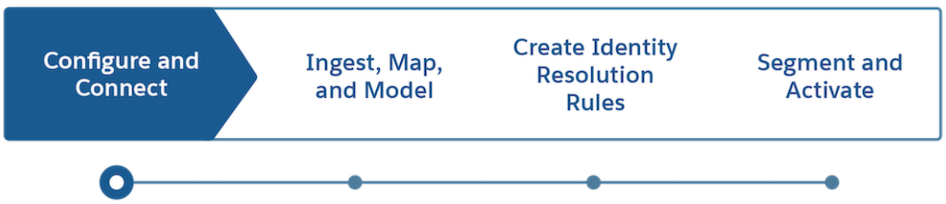
NTO has the following initial requirements:

- Ingest data from its AWS (S3) account.
- Activate published segments to its US Retail Business Unit in Marketing Cloud.
- Build a segment for loyalty customers who prefer camping that can be used in a loyalty rewards campaign in Marketing Cloud Journey Builder.

Overview of Customer 360 Audiences Implementation Steps

There are several implementation steps to complete to set up your new Customer 360 Audiences org.

Let's review these steps, along with the roles responsible to complete them.



Configure and Connect

The Customer 360 Audiences admin updates the permission set, provisions the Customer 360 Audiences account, creates users, and establishes connections with data sources.

Ingest, Map, and Model

Data drives Customer 360 Audiences functionality. These steps are essential to set up the marketer for success in creating segments.

- Import your data set from Marketing Cloud, Sales and Service Cloud, or Cloud Storage (AWS S3) in its original form, or "as-is".
- Extend your original source schema or blueprint if desired through formula fields. Formula fields allow you to cleanse or derive more fields so that your data is in an optimal format for segmentation and content personalization.
- Save the original source fields and the optional formula fields to collectively define your data source object (DSO).
- Harmonize your preserved source schema into a cohesive, source-agnostic view, by mapping your DSO to a data model object. Select a standard data model object informed by the Cloud Information Model or create your own.
- Ensure that relationships between data model objects are defined. Tie all objects back directly or indirectly to an entity that can be used in segmentation.

  Note: The starter data bundles available for Marketing Cloud Email Studio, MobileConnect, and MobilePush are designed to give you fast time-to-value. With the starter bundles, data source objects are created and mapped to the data model automatically.

Create Identity Resolution Rules

Identity Resolution is a key feature of Customer 360 Audiences because it helps organizations identify customers and create a Unified Profile of each customer.

Segment and Activate

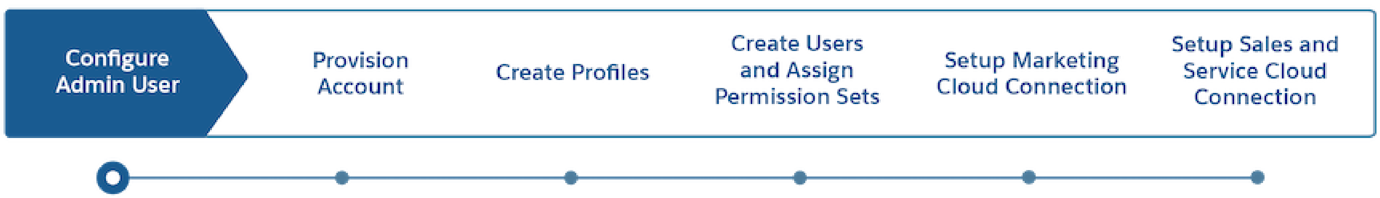
These steps are the ongoing responsibilities of the marketing manager and marketing specialist.

- Create your activation targets. Determine where you want to send your segmented data to be used. For example, in Marketing Cloud, s3, or another Salesforce org.
- Segment your data. Create flexible audience segments using easy drag functionality.
- Publish and activate your segment.
- Market to your customers. Take those segments and delight your customers with timely marketing experiences. Use your audience segments as an entry source in Journey Builder.

Follow along with the Northern Trail Outfitters team as they complete each of these implementation steps.

Configure and Connect

Implementation steps for the admin to complete to set up Customer 360 Audiences.



Use Case: Pia Larson is the Northern Trail Outfitters (NTO) Enterprise Architect. Pia also has credentials and access to Marketing Cloud, S3, and for Customer 360 Audiences. Pia received an email notification that NTO's account is ready to provision. With the NTO business requirements handy, Pia is ready to get started.

Here are the configuration and connection steps that Pia, the Customer 360 Audiences admin, must complete.

- Configure Customer 360 Admin User
- Provision Customer 360 Audiences Instance
- Create Profiles
- Create Users and Assign Permission Sets
- Setup Marketing Cloud Connection
- Setup Sales and Service Cloud Connection

Configure a Customer 360 Audiences Admin User
After you purchase Customer 360 Audiences, you receive an admin email with login information. Follow these steps to set up your user with the proper permissions.

Provision Customer 360 Audiences Instance
Make sure to complete the Customer 360 Audiences provisioning process. The first time you log in, you receive a URL link to sign in and reset your password.

Create Customer 360 Audiences User Profiles
Create user profiles for the Customer 360 Audiences user roles. These roles are for: Customer 360 Audiences Marketing Manager, Customer 360 Audiences Marketing Specialist, and Customer 360 Audiences Data-Aware Specialist.

Create Users and Assign Customer 360 Audiences Permission Sets

Create users and change your permission sets in your Salesforce org to prepare Customer 360 Audiences users.

Set Up Marketing Cloud Connection

After you create your Customer 360 Audiences instance, you can control the scope of data ingestion and activation from Marketing Cloud and other sources. Before integrating Marketing Cloud with Customer 360 Audiences, make sure your Marketing Cloud user's default business unit is set to the Enterprise ID (EID). You also can set up your data sources to tell Customer 360 Audiences where to ingest in from for data mapping and segments.

Set Up CRM Connection

After you create your Customer 360 Audiences instance, control the scope of data ingestion and activation from Salesforce CRM.

Set Up Mobile and Web Application Connection

After you create your Customer 360 Audiences instance, control the scope of data ingestion and activation from Mobile and Web applications.

Enable Data Explorer Permissions

The Customer 360 Audiences Administrator must enable Data Explorer in the Setup application for it to be accessible by other users.

Configure a Customer 360 Audiences Admin User

After you purchase Customer 360 Audiences, you receive an admin email with login information. Follow these steps to set up your user with the proper permissions.

1. Log in to your Salesforce Customer 360 Audiences instance with the link provided in your admin email.
2. Reset your password when prompted on-screen.
3. From Setup, in the Quick Find box, enter `users`, and then click **Users.**
4. From the user screen, click your username.
5. From your user page, under Permission Set Assignments click **Edit Assignments**.
6. Select the Customer 360 Audiences Admin permission set and click the **Add** arrow icon.
7. Save your changes.

Provision Customer 360 Audiences Instance

Make sure to complete the Customer 360 Audiences provisioning process. The first time you log in, you receive a URL link to sign in and reset your password.

1. Log in to your Salesforce Customer 360 Audiences instance with the link provided in your admin email.
2. Navigate to the Setup gear.
3. Click **Audiences**.

   Note: If you don't see this option, either refresh your page or log out and back in with your admin user credentials.

4. Click **Get Started**. The setup can take a few minutes to complete.

Your Customer 360 Audiences instance is successfully set up.

Create Customer 360 Audiences User Profiles

Create user profiles for the Customer 360 Audiences user roles. These roles are for: Customer 360 Audiences Marketing Manager, Customer 360 Audiences Marketing Specialist, and Customer 360 Audiences Data-Aware Specialist.

1. From Setup, in the Quick Find box, enter `profile`, and then select **Profiles**.
2. Locate the Identity User and click **Clone**.
3. In the Profile Name field, enter the profile name. For example, Customer 360 Audiences Marketing Manager.
4. Save your work.
5. Click **Edit** on the newly created profile page.
6. Under Custom App Settings, select the radio button to make the Audiences app appear as the user's Default home page.
7. Save your changes.

Create Users and Assign Customer 360 Audiences Permission Sets

Create users and change your permission sets in your Salesforce org to prepare Customer 360 Audiences users.

1. From Setup, in the Quick find box, enter `users` .
2. Click **Users**.
3. From the user screen, click **New User**.
4. Fill out the required General Information for your user:
   a. Last Name
   b. Alias: This field is auto generated but can be updated.
   c. Email
   d. Username: Username must be in the form of an email address (for example, john@acme.com)
   e. Nickname: Display name for users in online communities.
   f. Role: Keep as None Specified.
   g. User License: Identity Profile: Select the associated profile for that user from the profiles you created.
   h. Email Encoding
5. Fill out the required Locale Settings information for your user:
   a. Time Zone
   b. Locale
   c. Language
6. Fill out the required Approver Settings information for your user:
   a. Receive Approval Request Emails
7. Save your work.
8. From the user screen, click **Edit Assignments** under Permission Set Assignments.
9. Assign the appropriate permission set to that user.
10. Save your changes.

Set Up Marketing Cloud Connection

After you create your Customer 360 Audiences instance, you can control the scope of data ingestion and activation from Marketing Cloud and other sources. Before integrating Marketing Cloud with Customer 360 Audiences, make sure your Marketing Cloud user's default business unit is set to the Enterprise ID (EID). You also can set up your data sources to tell Customer 360 Audiences where to ingest in from for data mapping and segments.

Customer 360 Audiences only supports Marketing Cloud Enterprise 2.0 account connections.

1. Click **Audiences Setup** under the Setup gear.
2. Under Configuration, click **Marketing Cloud**.
3. Note: Customer 360 Audiences only supports Marketing Cloud Enterprise 2.0 accounts.

   To provide your Marketing Cloud credentials for authentication, click **Manage**.
4. Enter the Marketing Cloud username and password.

   Note: We recommend using a dedicated Marketing Cloud user account for integration with Customer 360 Audiences. Work with your Marketing Cloud administrator to create an account for this purpose. The dedicated user account must have Administrator and Marketing Cloud Administrator roles. The account's default business units (BUs) must be the Enterprise-level account and have access to the desired business units.
5. To enable the channels to ingest into Customer 360 Audiences, click **Manage**. If you don't want to ingest data from Marketing Cloud, click **Skip**.
6. You see the channels that are available in the connected Marketing Cloud instance highlighted. To enable the highlighted channels for ingest using the Audiences Starter Bundles, click **Start**.
7. You see three data bundle sources: Email, MobileConnect, and MobilePush. Data bundles allow you to quickly and easily create multiple data streams to ingest system-owned data from Marketing Cloud. You can manually add more data extensions afterward.

   Note: Customer 360 Audiences creates a set of automations and automation activities in Marketing Cloud Automation Studio to support data ingest. These automations transfer data between the two products. Don't alter or edit these activities.
8. To select which business units to ingest data from, click **Manage**.
9. Use the arrows to add or remove business units in Selected Business Units (BUs). The top-level business unit is preselected and can't be deselected because all subscriber data for the email channel is at that level.
10. Click **Save**.
11. To select which business units to activate segments to, click **Manage**.
12. Use the arrows to add or remove business units in Selected Business Units (BUs).

    Note: You can select any number or combination of business units independent of the BUs selected for ingest to activating segments from Audiences.

Set Up CRM Connection

After you create your Customer 360 Audiences instance, control the scope of data ingestion and activation from Salesforce CRM.

1. In the Salesforce org that has Customer 360 Audiences provisioned, click Setup, and select **Audiences Setup**.
2. Select **Sales & Service Cloud**.
3. To connect a Salesforce org to Customer 360 Audiences, click **New**. You can connect the Salesforce org that has Customer 360 Audiences provisioned, or you can **Connect Another Org** (external orgs).

4. To connect your Salesforce orgs to Customer 360 Audiences, click **Connect**. If connecting an external Salesforce org, enter your user credentials to establish the connection with Customer 360 Audiences.
5. After you connect your Salesforce org, you can view the connection details.
   a. Connector Name: The name of the Salesforce org that is connected to Customer 360 Audiences.
   b. Connector Type: Identifies the name of the data connection type.
   c. Status: Shows the org's status.
   d. Org Id: The Salesforce org Id connected to Customer 360 Audiences.
   e. Updated: The date and timestamp of when the Salesforce org was connected to Customer 360 Audiences.
6. Your Sales and Service Cloud org is now connected.

   Note: API access is required for Salesforce orgs to use Customer 360 Audiences. Before connecting your Salesforce org, ensure it has API access enabled.

Setting User Permissions to Connect an External Salesforce Org
For a non-Admin user to connect an external Salesforce org to Customer 360 Audiences, they must have the proper user permissions assigned by the Admin account.

Setting User Permissions to Connect an External Salesforce Org

For a non-Admin user to connect an external Salesforce org to Customer 360 Audiences, they must have the proper user permissions assigned by the Admin account.

1. Log into the Salesforce org to Customer 360 Audiences as an Admin user.
2. Click **Setup**.
3. In the Quick Find field, search for and open Permission Sets.
4. To create a permission set, click **New**.
5. In the Label field, enter a name for the permission set. For example, `ManageC360AConnections.`
6. Click **Save**.
7. Scroll down to System, and click **System Permissions**.
8. Search for Connect Org to Customer 360 Audiences, and click to enable.
9. Search for Manage Users, and click to enable.
10. Click **Save**.
11. When the Permission Changes Confirmation dialog appears, click **Save**.
12. Click **Manage Assignments.**
13. Click Add Assignments, and select the desired user.
14. Click **Assign**.
15. Your user now has the appropriate access to connect their external Salesforce org to Customer 360 Audiences.

Set Up Mobile and Web Application Connection

After you create your Customer 360 Audiences instance, control the scope of data ingestion and activation from Mobile and Web applications.

EDITIONS

Available in: Lightning Experience

1. In a Salesforce org that has Customer 360 Audiences provisioned, from Setup, in the Quick Find box, enter `Audiences setup`, then select **Websites & Mobile Apps**, and then Click **New**.
2. Populate your App Name and select the connector type, either a website or mobile app.

   Note: If you need to adjust your app name or connector type at any time after creation, click **Edit**.

3. To select a JSON file from your computer for the schema, click **Upload Files**. You can also drag the file onto the dashboard.
4. You can now preview your JSON schema. Confirm that all events and fields are populated accordingly, and then save your work..
5. You can view all created event types for this schema. Compare it with your JSON schema file for accuracy.

Your schema is created. To make changes to your schema at any point, click **Update Schema**.

Tenant Specific Endpoint
The Tenant Specific Endpoint is a system-generated code in Customer 360 Audiences that is used when creating data streams.

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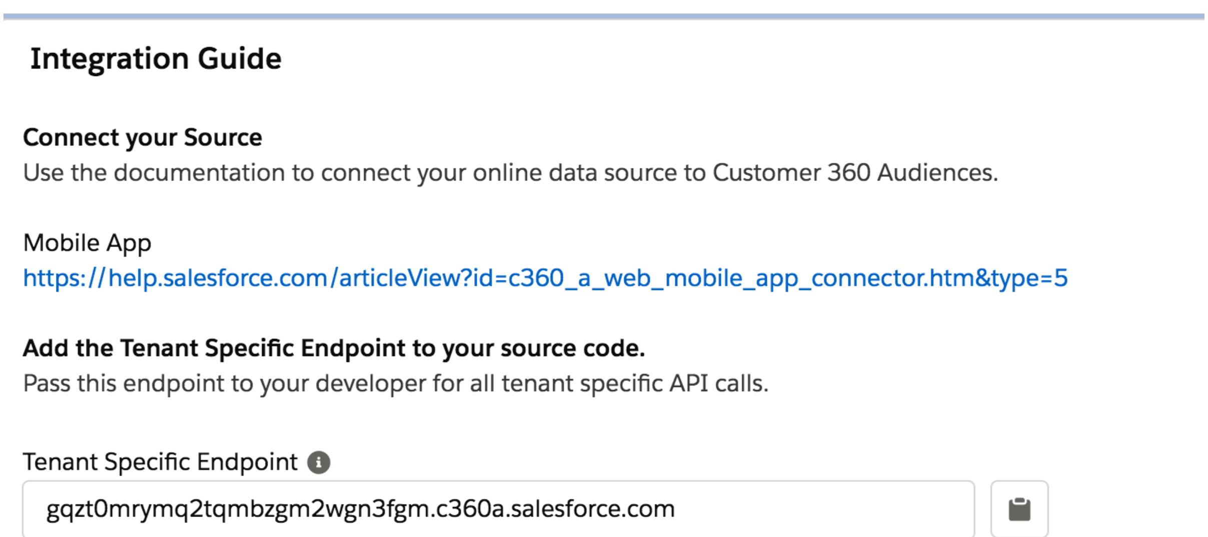
EDITIONS

Available in: Lightning Experience

Your Tenant Specific Endpoint is auto-generated when setting up a Mobile or Web app connection. The Tenant Specific Endpoint is used when creating a data stream from the created mobile or web application.



Enable Data Explorer Permissions

The Customer 360 Audiences Administrator must enable Data Explorer in the Setup application for it to be accessible by other users.

Log in to your Customer 360 Setup application to enable Data Explorer. The system applies these permissions by default:

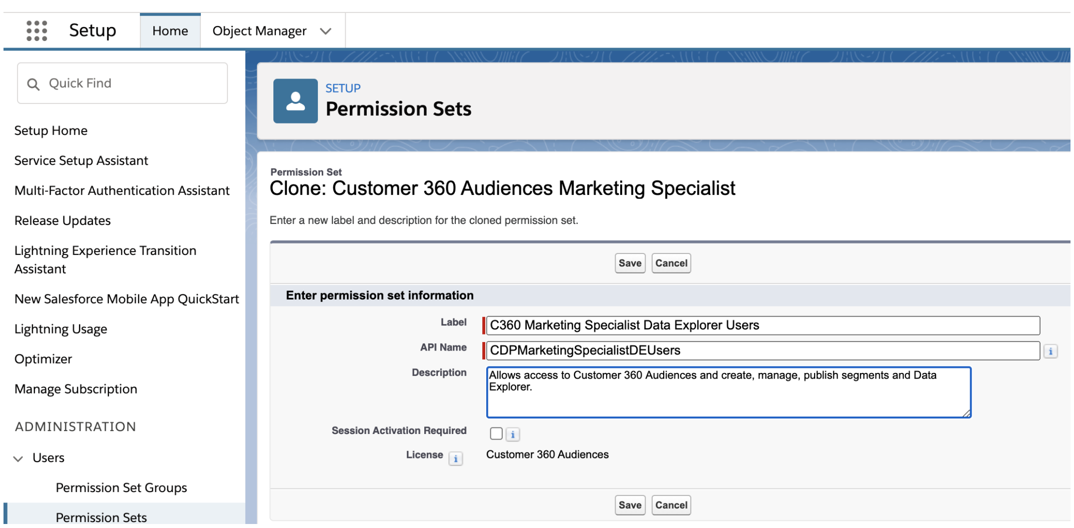
Permission Set	Data Explorer Access
Customer 360 Audiences Admin	Enabled
Customer 360 Audiences Data Aware Specialist	Enabled
Customer 360 Audiences Marketing Manager	Restricted
Customer 360 Audiences Marketing Specialist	Restricted

EDITIONS

Available in: Lightning Experience

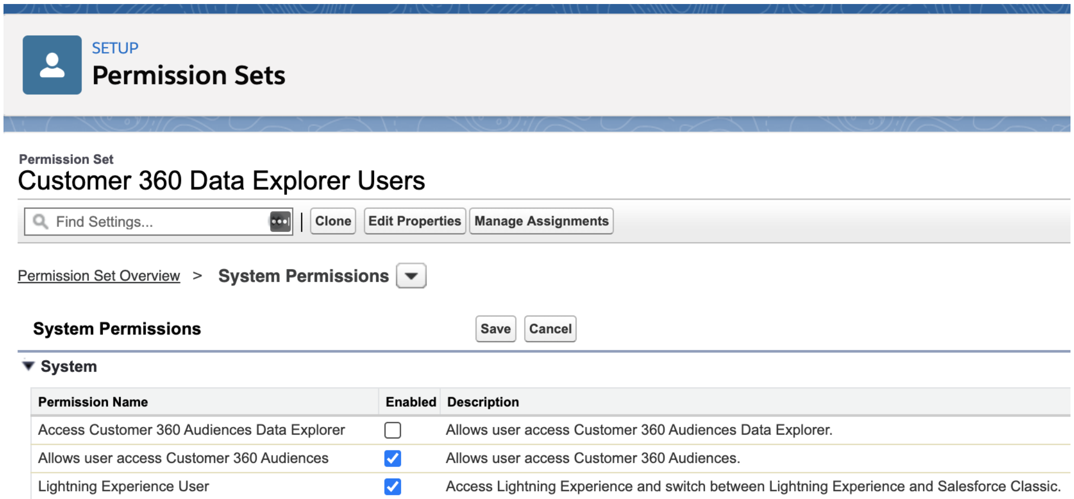
To enable for any restricted permission set:

1. Log in as the Administrator.
2. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.



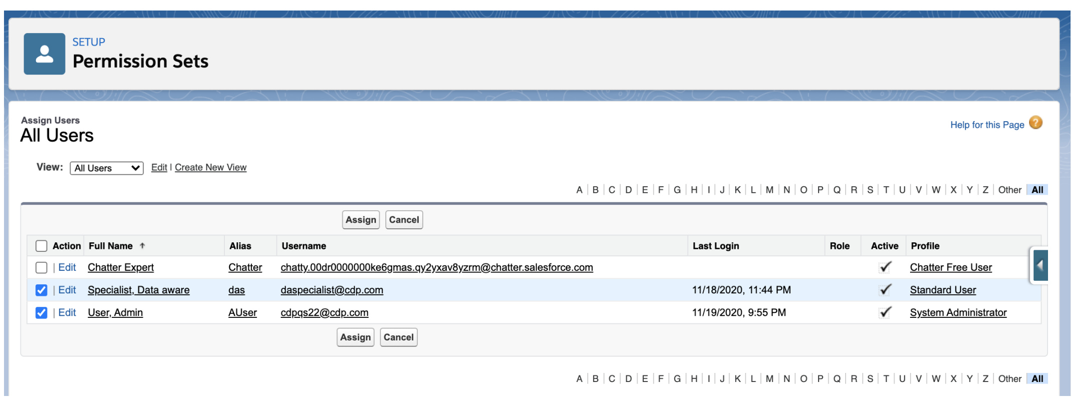
3. Clone one of the existing restricted C360 Audiences permission sets.
4. Add a name, for example, `C360 Marketing Specialist Data Explorer Users`, and add an API name for the permission set.
5. Save your changes.
6. Click **System Permissions** at the bottom of the page.
7. To grant access to Data Explorer, click **Edit**.

8. Save your work.



9. Click **Manage Assignments**, then click **Add Assignment** and add the users who you want to enable Data Explorer for.

Note: You can only add users that have a Customer 360 Audiences license.



10. Refresh the Customer 360 Audiences home page to see the Data Explorer tab.

Custom Data Explorer Permissions
The Customer 360 Administrator can remove data explorer permissions or assign custom permissions based on user roles.

Custom Data Explorer Permissions

The Customer 360 Administrator can remove data explorer permissions or assign custom permissions based on user roles.

To restrict users who have Data Explorer enabled by default, clone an enabled permission set in Customer 360 Audiences. Edit the system permissions, remove the Data explorer permission, and assign the users as needed.

EDITIONS

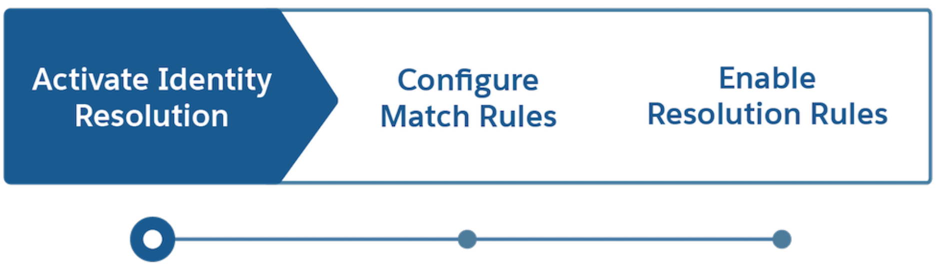
Available in: Lightning Experience

If you want to create a custom permission set that allows access to a user from multiple permission sets:

1. Create a permission set, for example, `CDP Data Explorer Users`.
2. Select the Customer 360 Audiences license.
3. Save the new permission.
4. Navigate to System Permissions, click **Edit**.
5. Enable the Data Explorer permission.
6. After it's saved, click **Manage Assignments** and add users you want Data Explorer to be enabled for.

Ingest, Map, and Model

Implementation steps for the data-aware specialist to complete data ingestion and modeling.



Use Case: Warren Mehta, the Northern Trail Outfitters (NTO) IT specialist, is named the Customer 360 Audiences data-aware specialist. First Warren creates a data stream with S3 to ingest data into Customer 360. Then Warren maps that data to a data model.

Here are the ingest, map, and modeling steps that the Customer 360 Audiences data-aware specialist must complete.

- Ingest data from a cloud storage data stream
  - Clean data source as needed using a formula field
- Map imported source data to the data model
  - Verify that all required fields have been mapped
- Define relationships between data model objects

Create a Cloud Storage Data Stream
Create a data stream to begin the flow of data from a cloud storage source.

Data Mapping
After creating your data streams, you must associate your data source objects (DSOs) to data model objects (DMOs). Only mapped fields and objects with relationships can be used for Segmentation and Activation.

Create a Cloud Storage Data Stream

Create a data stream to begin the flow of data from a cloud storage source.

1. Navigate to the Data Streams tab.
2. Click **New**.

3. Select the Cloud Storage data source.
4. Provide credentials to an S3 bucket and configure source details:
   a. *S3 Bucket Name*: Specific public cloud storage resource in AWS
   b. *S3 Access Key*: Programmatic username for API access to AWS
   c. *S3 Secret Key*: Programmatic password for API access to AWS
   d. *Directory*: Path name, or folder hierarchy, leading to a file's physical location. If no path is specified, the system defaults to the root directory.
   e. *File Name*: The file name that must be retrieved within the specified directory. If no file is specified, the system chooses the first file found. After creating your stream, it will retrieve all the files found in the directory.
   f. *Source*: External system where data is sourced. Multiple data streams can have the same Source.
   g. *Object Label*: Display name of the object storing the data set. The Object Label must be unique.
   h. *Object API Name*: API name of the object storing the data. The Object API Name must be unique with no spaces.
5. Complete Object Details:
   a. *Category*: For time series data, such as transactional or engagement events, choose Engagement. Otherwise, choose Profile. View the Profile and Engagement Categories section for details.
   b. *Event Date & Time Field*: The event creation date. This field is applicable only for Engagement Category data streams.
   c. *Primary Key*: Indicates which raw data field uniquely identifies a row. If the key definition spans multiple columns, create a composite key by adding a formula field and declaring the derived field as primary.
   d. *Organization Unit Identifier*: Indicates which data field corresponds to the business unit. If no business unit designation exists in the raw data, one can be hardcoded or derived by using a formula field. This field is optional.
6. Review and optionally edit the fields identified in the table.
   a. *Header Label*: Displays the column headers as they exist in the raw data. This label can't be changed.
   b. *Field Label*: Defaults to the header label, but is editable. The field label acts as the display name for a data stream field.
   c. *Field API Name*: Defaults to the header label, but is editable. The field API name acts as the programmatic reference for a field within a data stream. Field names can only contain underscores and alphanumeric characters. A field name must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
   d. *Formula Field*: This column shows a check mark for any derived fields. A derived field is a field with no header label, or a field that didn't exist in the raw data.
   e. *Data Type*: Supported Data Types include Number, Text, and Date. If you want a different data type, create a formula field with the data type, and then reference the field in the syntax editor with no other formula transformation. View the Formula Expression Library section for details.
7. Add new formula fields if needed. View the Formula Expression Library and Formula Expression Use Cases for more information.
   a. *Field Label*: The field label acts as the display name for a data stream field.
   b. *Field API Name*: The field API name acts as the programmatic reference for a data stream field.
   c. *Formula Return Type*: The data type corresponding to the newly derived field. Options include Number, Text, and Date.
8. Fill in deployment details.
   a. *Data Stream Name*: Defaults to Object Label, but can be edited.

b. *Extract Settings*: Only required for Marketing Cloud Data Extension configurations. Corresponds to the mechanism to extract data from Marketing Cloud. For example, does the export include data available for all time, or must the export be based on a high water mark corresponding to a field in the raw data? View the Extract Settings section for details.

c. *Refresh Modes*: Method for incoming data to affect existing data in the table. Options include Upsert and Full Refresh.

d. *Refresh Source*: The physical location where data can be retrieved from. Options include Marketing Cloud and AWS S3. These sources can't be changed.

e. *Schedule*: Frequency and timing of new data retrieval. View the Data Stream Schedule section for details.

Data Mapping

After creating your data streams, you must associate your data source objects (DSOs) to data model objects (DMOs). Only mapped fields and objects with relationships can be used for Segmentation and Activation.

On the Data Stream detail page or after deploying your data streams, click **Start Data Mapping**.

On the Data Streams mapping canvas, you can see both your DSOs and target DMOs. To map one to another, click the name of a DSSO and connect it to the desired DMO. For example, you can map the DSO firstname to the target First Name field using this method.

Required Data Mappings

When mapping your party area data, complete the required fields and relationships to successfully use Identity Resolution, Segmentation, and Activation.

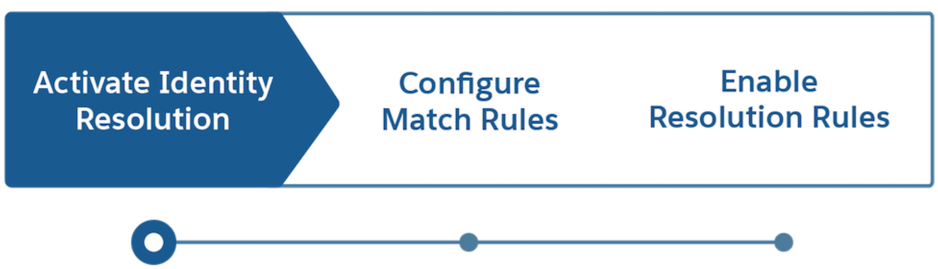
The Individual object and either a Contact Point or the Party Identification object must be mapped in Data Streams to successfully use Identity Resolution, Segmentation, and Activation.

Entity	Fields	Relationship
Individual	ID	
Contact Point Email	ContactPointId PartyId EmailAddress	ContactPointEmail (PartyId) (Many) --> Individual (Id) (One)
Contact Point Phone	ContactPointId (key) PartyId TelephoneNumber PhoneCountryCode FormattedE164PhoneNumber	ContactPointPhone (PartyId) (Many) --> Individual (Id) (One)
Contact Point Address	ContactPointId (key) PartyId	ContactPointAddress (PartyId) (Many) --> Individual (Id) (One)

Entity	Fields	Relationship
	StreetID CityID (City Name) StateName (State Province Name) CountryID (Country Name)	
Contact Point Social	ContactPointId (key) PartyId SocialHandleId	ContactPointSocial (PartyId) (Many) --> Individual (Id) (One)

Create Identity Resolution Rules

Implementation steps for the admin and the data-aware specialist to create identity resolution rules.



Use Case: Before any segments can be created, Northern Trail Outfitters (NTO) must implement Identity Resolution Rules to create a unified profile for customers. Identity resolution rules help reduce duplicate records by matching individuals found in various data sources. Pia, the admin, activates Identity Resolution rules in Customer 360 Audiences Setup. Next Warren, the data-aware specialist, configures the match and resolution rules.

Here are the ingest, map, and modeling steps that Pia and Warren must complete.

- Activate Identity Resolution
- Configure Match Rules
- Enable Resolution Rules

Identity Resolution
With the Customer 360 Audience Identity Resolution feature, you can combine profile, behavioral, and transactional data from disparate data sources into a Unified Profile of your customer. Identity Resolution uses matching and reconciliation to retain the most relevant and comprehensive data set for each Unified Profile.

What Is a Unified Individual?
The Unified Individual is an important concept to understand when using Customer 360 Audiences.

Match Rules
Learn how to use and configure Match Rules in Customer 360 Audiences.

Reconciliation Rules

Learn about Reconciliation Rules in Customer 360 Audiences.

Identity Resolution Deletion

Use the Customer 360 Audience Identity Resolution delete feature to delete all Identity Resolution data and stop future processing.

Identity Resolution

With the Customer 360 Audience Identity Resolution feature, you can combine profile, behavioral, and transactional data from disparate data sources into a Unified Profile of your customer. Identity Resolution uses matching and reconciliation to retain the most relevant and comprehensive data set for each Unified Profile.

Before enabling Identity Resolution, complete your Data Services mappings to the Cloud Information model. Match rules can be configured after the related mappings are complete. To start using Identity Resolution, navigate to the Audiences Setup Gear, click **Identity Resolution**, and then **Get Started**.

Activate and Deactivate Identity Resolution

When creating your Identity Resolution rules for the first time, your process is inactive. To make changes, click **Edit Criteria**.

Click **Publish** after making any changes to Identity Resolution to ensure that the most recent version of your Match and Reconciliation Rules are used across Customer 360 Audiences.

What Is a Unified Individual?

EDITIONS

Available in: Lightning Experience

The Unified Individual is an important concept to understand when using Customer 360 Audiences.

A Unified Individual object contains the profile information, for example, First Name, of the unified customer record and is automatically created by the Identity Resolution engine in Customer 360 Audiences. Unification is determined based on Identity Resolution's Match Rules and Profile data stored in the Unified Individual object is selected by the system based on Reconciliation Rules.

Customer 360 Audiences also automatically creates Unified Contact Point objects which aggregate contact points from different data sources, such as Salesforce Clouds or external systems.

Customer 360 Audiences processes records from each ingested data source to populate Individual objects. These Individual objects are related to the customer's behavioral, engagement, and transaction data. When Customer 360 Audiences creates the Unified Individual object, it links to the source Individual objects and related information for the source Individual records is available as a unified customer record.

PartyIdentification Object

Learn more about the requirements for using the Exact Party ID Match Rule in Customer 360 Audiences that must be fulfilled in data mapping.

PartyIdentification Object

Learn more about the requirements for using the Exact Party ID Match Rule in Customer 360 Audiences that must be fulfilled in data mapping.

To be included in the Exact Party ID Match Rule, data streams must be mapped to the PartyIdentification object. The following fields must be successfully mapped:

- **Identification Number**: This ID is compared for Identity Resolution.

- **Identification Name**: This required field is used to specify the name of the ID space, for example: Customer ID, LinkedIn URL.
- **Party Identification Type**: This required field is used to specify an extra level of organization. This field is required for mapping, but optional for use in Match. For example, a Customer ID could have further classification such as CRM ID, MDM ID.
- **Party ID**: This ID is the same as the one used in the Individual object.
- **Identification ID**: This ID is any unique ID.

Also, a relationship must be set up between the PartyIdentification object.Party ID and Individual.Individual ID.

Match Rules

Learn how to use and configure Match Rules in Customer 360 Audiences.

You can use Match Rules to link multiple records into a unified customer profile. Match Rules let you specify the conditions where unification is applied.

To create Match Rules, click **Configure**.

Configure Match Rules

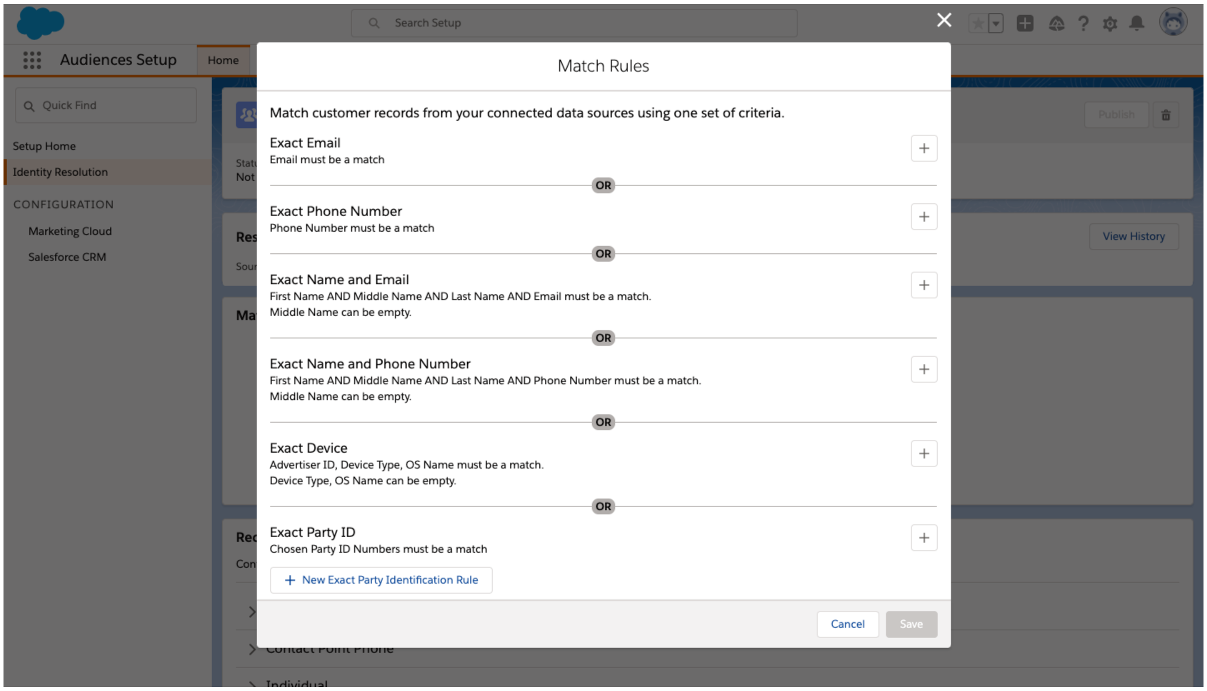
Different fixed match rule combinations are available. You can use any subset of these rules, and you can mix and match them to meet your needs.

- **Exact Email:** Use this option to unify records that have the same email address. This option automatically includes all Individual records that have email addresses mapped during data mapping.
- **Exact Phone Number:** Use this option to unify records that have the same phone number. This option automatically includes all Individual records that have phone numbers mapped during data mapping. Make sure to standardize phone numbers to the same format while creating data streams.
- **Exact Name and Email:** Use this option to unify records that have the same name and the same email address. This option automatically includes all Individual records that have names and email addresses mapped during data mapping. The first and last names are automatically included in the comparison. If mapped to the data stream, the middle name can be included.
- **Exact Address:** Use this option to unify records that have the same mailing address. This option automatically includes all Individual records that have mailing addresses mapped during data modeling
- **Exact Name and Phone Number:** Use this option to unify records that have the same name and the same phone number. This option automatically includes all Individual records that have names and phone numbers mapped during data mapping.
- **Exact Device:** Exact Device Match lets Identity Resolution detect matches across profiles created on the same device. You can unify records created by multiple apps owned by one customer, unify records across apps and offline files like media logs, and unify records across apps and Mobile Push campaigns when Advertiser ID is available. The matching algorithm compares Advertiser IDs (Apple's IDFA or Android's AAID) to determine a match. You're able to also include Device Type and operating system Name as further match criteria.

  Note: The Device object in the Data Model must be mapped successfully to enable this match rule.

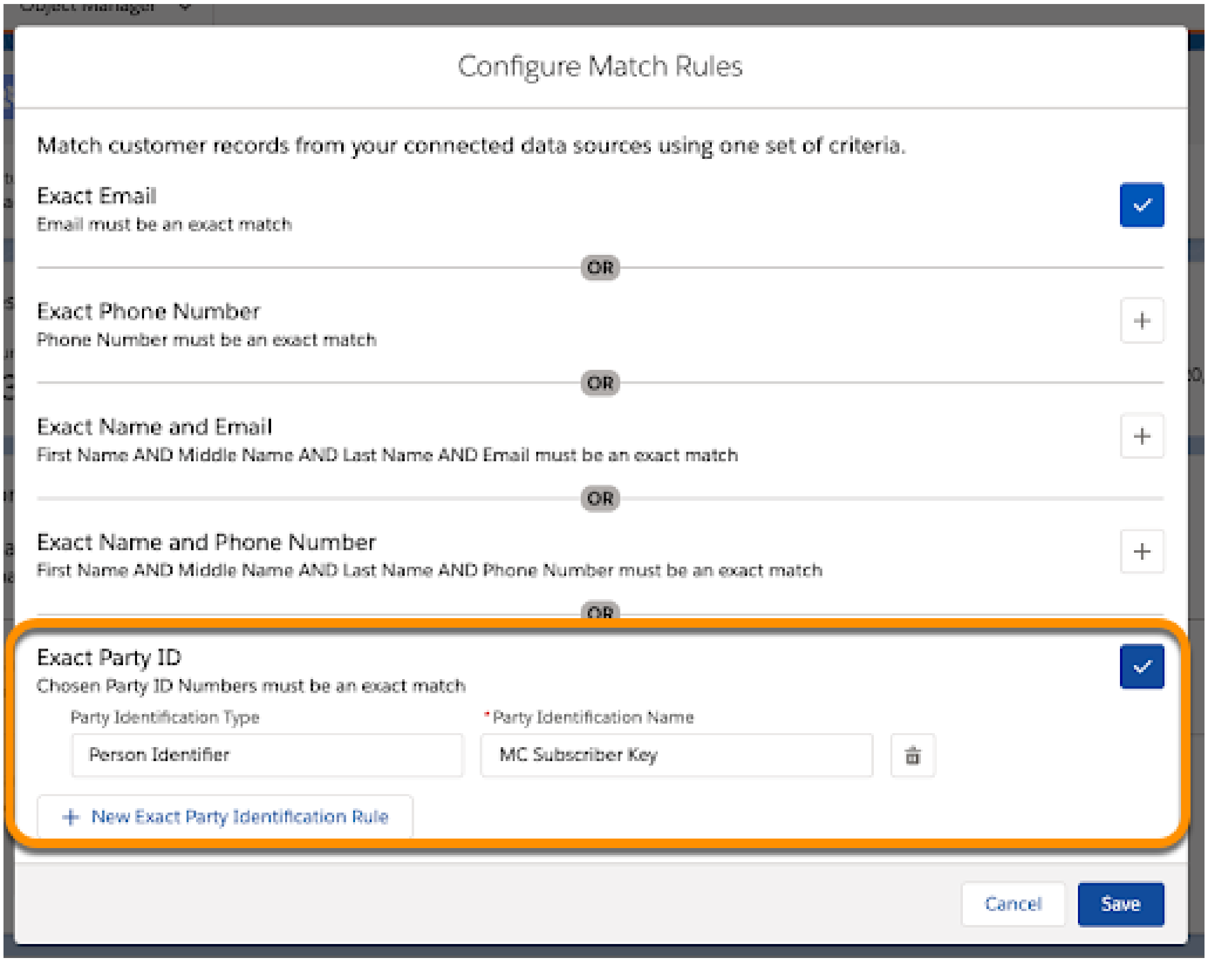
- **Exact Party ID:** Use this option to unify records based on external identifiers such as customer IDs. This option supports specification of Names and Types that can be used to prevent false matches across independent ID spaces. To be included in this option, data streams must also include mapping to the PartyIdentification object.

When finished selecting your rules, save your changes.



Marketing Cloud Unified Individual

Because Marketing Cloud data bundles represent subscriber data across Email Studio, MobileConnect, and MobilePush, multiple Individual records can be created from the source information. To ensure these records are appropriately joined in CDP as a single, unified profile, configure an Exact Party ID in Identity Resolution.



Reconciliation Rules

Learn about Reconciliation Rules in Customer 360 Audiences.

Reconciliation rules determine how to select profile attributes in the Unified Profile. Unlike behavioral, transaction and engagement data, profile data such as Name can't have multiple values.

Reconciliation Rule	Definition
Last Updated	This rule specifies that the most recently updated value must be selected for inclusion in the Unified Profile.
Most Occurring	This rule specifies that the most frequently occurring value must be selected for inclusion in the Unified Profile.
Source Sequence	This rule allows you to sort your data sources in order of most to least preferred for inclusion in the Unified Profile.

Reconciliation rules can also be specified to determine how the lineage of duplicate contact points is stored.

Example: If the same email address is available from two data sources, the Unified Profile stores a single email address and attributes it to one of the two sources.

Example: If the First Name field for a record shows Samantha and Sam and your chosen reconciliation rule is Last Updated, the more recently value updated is included in the Unified Profile.

Enable or Disable Reconciliation Rules
Learn how to enable or disable Reconciliation Rules in Customer 360 Audiences.

Enable or Disable Reconciliation Rules

Learn how to enable or disable Reconciliation Rules in Customer 360 Audiences.

The reconciliation rules default to the Last Updated rule. This default can be changed at the field level individually or at the object level by clicking the pencil icon.

1. To set Reconciliation Rules, click your desired field under the Individual or Contact Point header.
2. To turn off the default setting for an object, select **Disable**.

   Note: This option is only available at the object level.

3. Click **Save**.
4. From the dropdown menu, choose your desired reconciliation rule. You can also choose to ignore empty values,if you would like empty fields in your data to be ignored.
5. Click **Save**.

Example: For example, to change the entire Individual group, click the Default Rule: Last Updated pencil icon under Individual. As another example, only change the Email field, expand the Individual object, and click Email.

Identity Resolution Deletion

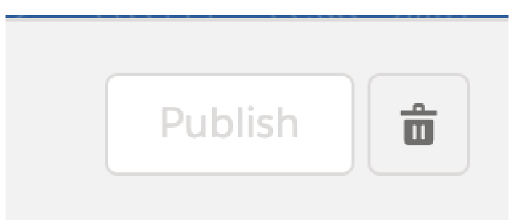
EDITIONS

Available in: Lightning Experience

Use the Customer 360 Audience Identity Resolution delete feature to delete all Identity Resolution data and stop future processing.

You can delete your reconciliation and match rules and data to stop unification of your data. This function can be used to remove all unified customer data, eliminate dependencies on data model objects, delete history of previous runs, and reset all settings in Identity Resolution.

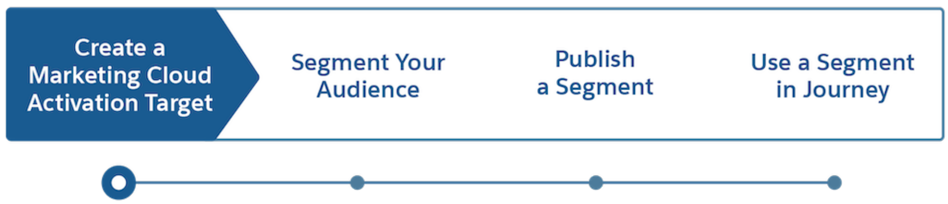
Use the trash icon in on the Identity Resolution home page to delete unification.



Warning: Deleting your unification is permanent. To edit your setup without deleting previous unification data, use the inline options to edit match and reconciliation rules.

Segment and Activate

Implementation steps for the marketing roles to begin segmenting and activating segments in Customer 360 Audiences.

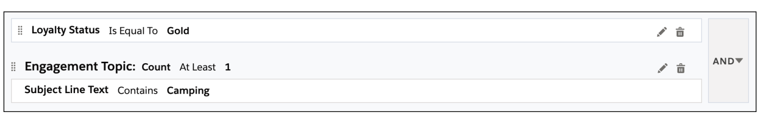


Use Case: Now that the account is set up, it's time for Northern Trail Outfitters (NTO) to create segments. First, Isabelle creates a Marketing Cloud activation target to be able to use the segment within the loyalty rewards journey. After Isabelle creates a target, Michele can build a segment. The segment is based on the following logic.

- Loyalty Status | equal to | gold

  AND

- Engagement Topic | count | at least | 1
- Subject Line Text | contains | camping



When Michele and Isabelle are happy with the segment and the associated population count, they can publish and activate that segment. After the segment appears in Marketing Cloud, Pia can update the audience of NTO's loyalty rewards journey.

Here are the segmentation and activation steps for the marketing roles to complete.

- Create a Marketing Cloud Activation Target
- Segment Your Audience
- Publish a Segment
- Use a Customer 360 Audience in Journey Builder

Create a Marketing Cloud Activation Target
Create an activation target in Customer 360 Audiences to publish segments to Marketing Cloud business units.

Segment Your Audience
Create a segment in Customer 360 Audiences to narrow your audience based on related or direct attributes.

Use a Customer 360 Audience in Journey Builder

Customer 360 Audiences are optimized for messaging using Journey Builder. You can also use Customer 360 Audiences for audience selection in Email Studio and MobileConnect. Audiences can include enriched unified individual records and new records. So it's important to consider consent management when sending.

Create a Marketing Cloud Activation Target

Create an activation target in Customer 360 Audiences to publish segments to Marketing Cloud business units.

1. Click **Activation Targets**.
2. Click **New Activation Target**.
3. Select **Marketing Cloud**.
4. Click **Next**.
5. Enter an easy to recognize and unique name.
6. Click **Next**.
7. Click the arrows between columns to add or remove which business units receive the published segments.
8. Click **Save**.

Your Marketing Cloud activation target is created.

Segment Your Audience

Create a segment in Customer 360 Audiences to narrow your audience based on related or direct attributes.

Note: Segments per Salesforce org is limited to 9,950.

1. Navigate to Segments.
2. Click **New**.
3. Fill in all desired fields under Segment Details. Segment On and Segment Name are required.
   - Segment On: Identifies the entity that your segment builds on.
   - Segment Name: Give your Segment a unique name that's easy to remember and recognize.
   - Segment Description: Provide detail about a segment's use, contents, or timeframes for later review.
4. Segment Publish Schedule determines when and how often your segment publishes to activation targets. Leave this blank for now, and fill it in after completing your segment filters.
5. Save your changes.
6. Use the dropdown arrows to expand and drag desired attributes to your Segment Canvas.
   - Direct Attributes: Each segmented entity has only one data point for a direct attribute, such as postal code or first name.
   - Related Attributes: Each segmented entity can have multiple data points for a related attribute, such as purchases, product characteristics, or email events.
7. Find Calculated Insights in the attribute library under the object referenced in the SQL. Alternatively, you can search for the Calculated Insight by name. Click the name to find the list of metrics, and then drag a metric to the segmentation canvas. Optionally, click **Add Dimension** to further aggregate your data.

   Note: Only use processed Calculated Insight in a segment.

8. Click **Done**.

Your segment is created.

Note: When linked fields contain placeholder values in your data, joined results are skewed. To prevent skewed data, remove data with placeholder values, such as Unknown or 0, before data ingestion.

Use a Customer 360 Audience in Journey Builder

Customer 360 Audiences are optimized for messaging using Journey Builder. You can also use Customer 360 Audiences for audience selection in Email Studio and MobileConnect. Audiences can include enriched unified individual records and new records. So it's important to consider consent management when sending.

When you create a journey, you select your audience in the Data Extension Entry Source in Journey Builder. To choose a Customer 360 Audience, choose your audience from the Customer 360 Segments folder that's located in the Shared Data Extensions folder.

Managing Consent

We recommend that you employ the following practices to help manage consent when you use unified Customer 360 Audiences in Journey Builder.

- Consider applying Filter Contacts criteria to limit who is included in the audience when you create the Entry Source. If it filters out many audience members, performance can be degraded.

  Note: As an alternative to using filter criteria for consent to the C360 Audience during the Data Extension Entry Source configuration, you can use a Decision Split if the SMS Activity appears later in the journey.

- When you configure an email activity to use a Customer 360 Audience, consider assigning a Publication or Suppression list for more consent management options.

Email Activities

You can configure email activities in Journey Builder that use Customer 360 Audiences as either multi-step or single send journeys.

SMS Activities

When you configure an SMS activity in Journey Builder to use a Customer 360 Audience, select **Send only to contacts who are subscribed currently** in the Delivery Options configuration step. This selection helps prevent sending to individuals who didn't opt in to receive the communication.

Push Messaging Activities

For push messaging using Customer 360 Audiences, use a multi-step journey. You can configure either a Push Notification, Inbox, or In-App Message activity to activate a MobilePush send. Consent for push messaging is managed in the MobilePush SDK.