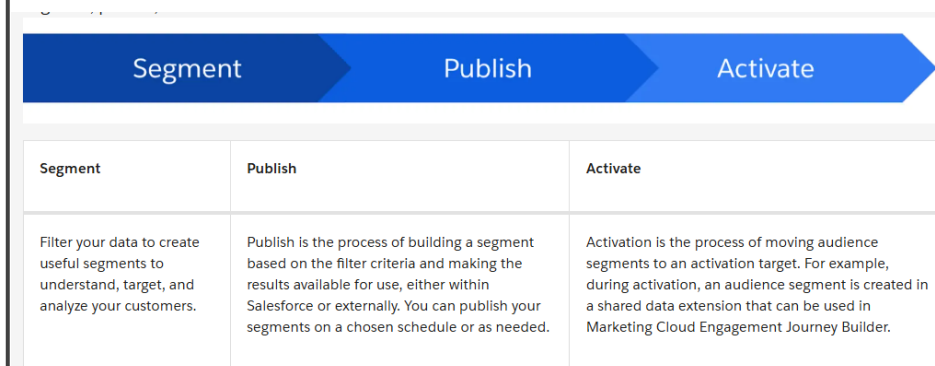
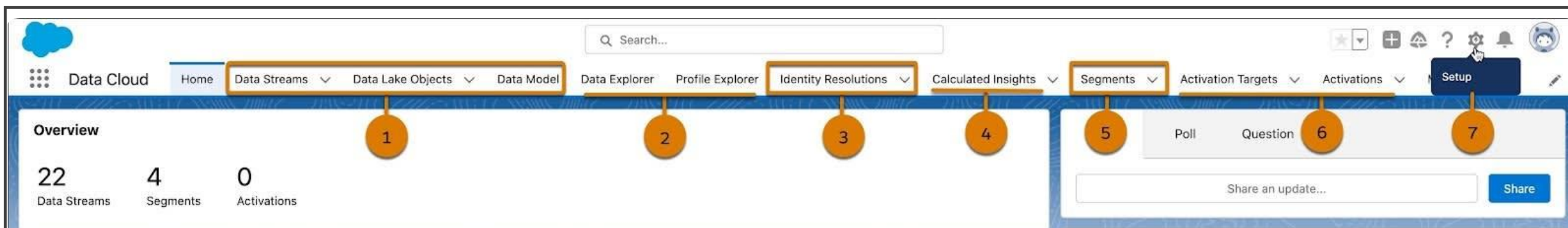


Salesforce Data Cloud

For Public Sector Solutions



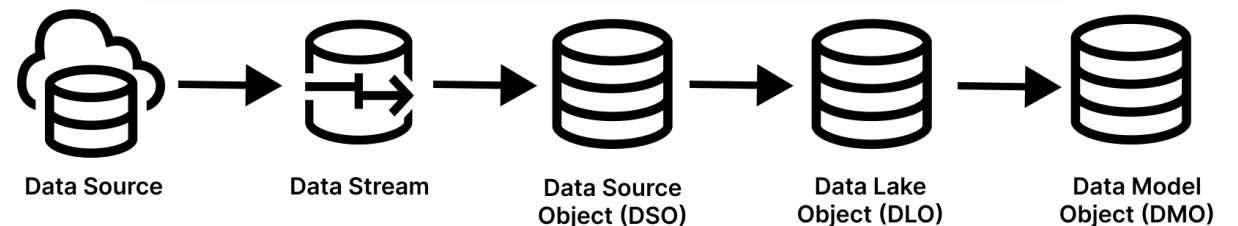
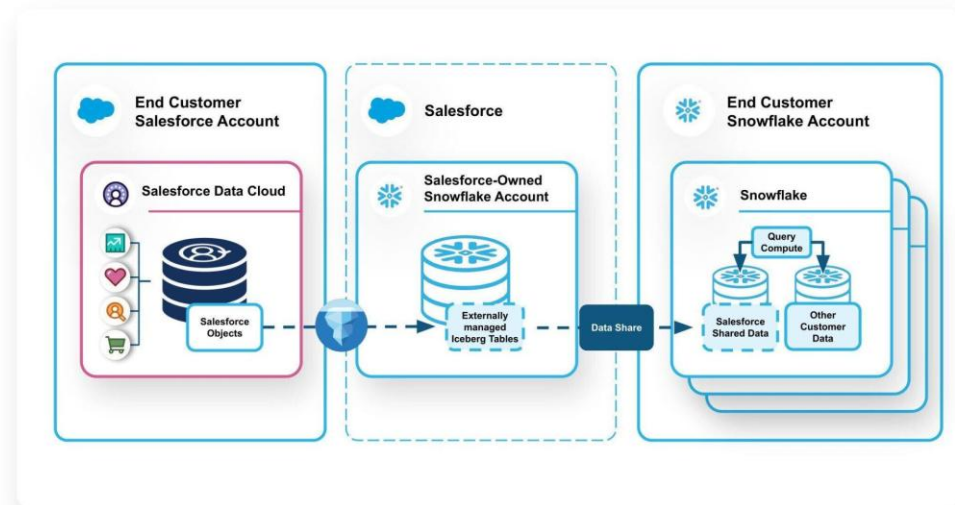
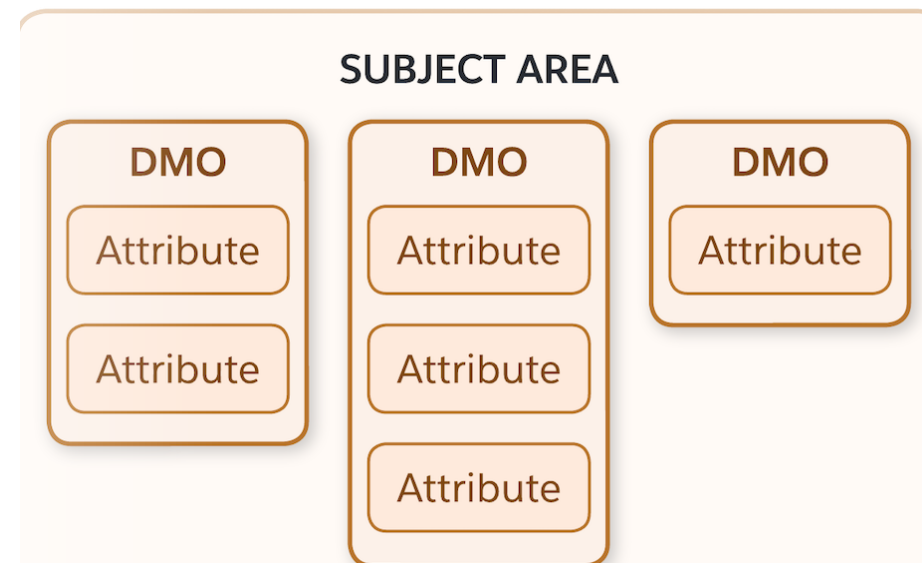


- **Data Streams, Data Lake Objects, and Data Model** (1) tabs provide insight into your selected data model and connected data sources that are created by the user with the data aware specialist permission set.
- **Data Explorer** and **Profile Explorer** (2) are data-viewing tools, allowing you to view your ingested and unified profile data, respectively.
- **Identity Resolutions** (3) is where your team creates match and reconciliation rules to unify individual records.
- **Calculated Insights** (4) are predefined and calculated metrics that can help you build segments.
- As a marketer, the **Segments** (5) tab is where you create your filtered audience segments.
- **Activation Targets** and **Activations** (6) are used to manage where segments get exported, for example Marketing Cloud Engagement.
- Finally, the **Setup** (7) gear is where admins manage account settings.

Data Cloud Segments

Data Model Object

- The Customer 360 Data Model is the standard data model
- **Data Model Object (DMO)**
 - A data model object is a grouping or way to organize data from data streams, insights, and other sources. DMOs can be standard or can be custom, based on business need. Common standard DMOs include sales orders, party identification, email engagement, and so on.
- **Attribute**
 - An attribute, also called a field, is a specific piece of data found in a DMO, for example, a customer's first name. This is similar to a data extension field in Marketing Cloud Engagement.
- **Foreign Key**
 - A foreign key is a common link found between data sources that builds data relationships—for example, a customer ID number.



Customer 360 Data Model

Customer 360



Unified Profiles and Data Segmentation

- Data Cloud harmonizes customer data across multiple systems into unified profiles.
- Unified profiles in Data Cloud link data from multiple sources into a single profile based on user-configured identity resolution rules within a **ruleset**.
 - Rulesets consists of mapping data to a standardized set of objects and fields. Once the map is completed, Admins will use an identity resolution ruleset with match and reconciliation rules. Finally, Data Cloud finds relationships between data based on these rules. If the same data exists in multiple places, profiles are linked together.
- Identity resolution rules tell Data Cloud how to find relationships between data to create the unified individual.
- **Unified Profiles as Key Rings:** key rings links keys (or data in our case) together, such as your house key and your car key. A key ring doesn't turn all your keys into the same key or choose a 'best' key'. It organizes them into a single object that you can grab with ease (portability, scalability, transferable).

DMO	Description	Attributes from Source Data	Attributes from Unified Individual
Individual DMO	Contains source data ingested into Data Cloud. For example, Rachel's Commerce profile in Data Cloud is an instance of an Individual DMO. You know exactly which data stream the data came from. You have no knowledge of the unified profile.	<ul style="list-style-type: none">• Individual Record ID• Data Source ID• Data Source Object• First Name• Last Name• Other ingested and mapped values	None

DMO	Description	Attributes from Source Data	Attributes from Unified Individual
Unified Link Individual DMO	The joining point between the source data and the unified individual. You can traverse data in either direction, up to the source data or down to the unified individual.	<ul style="list-style-type: none">• Individual Record ID• Data Source ID• Data Source Object	<ul style="list-style-type: none">• Unified ID
Unified Individual DMO	<p>Contains reconciled data from all linked individuals. This is not a comprehensive view, but rather a quick glance at sample values from Rachel's profile.</p> <p>No data is retained from the source profile, so you can't trace data lineage.</p>	None	<ul style="list-style-type: none">• Unified ID (listed as Individual ID)• Reconciled First Name• Reconciled Last Name• Other reconciled attributes from the individual object

Identity Resolution Rulesets

- Rulesets allow you to configure match rules and reconciliation rules about a specific object, such as individual.
- Review the data requirements to make sure your source data complies with the mapping requirements. It's easier to fix a data stream before ingestion than to update it after ingestion
- Match Methods
 - Exact:** Matching based on an exact match. No typos or alternative formats.
 - Fuzzy:** Matching based on a similar match. Typos and slightly different spelling are OK. This is only available for first name.
 - Normalized:** Matching based on the same exact info, regardless of formatting. This is available for email, phone, and address.
- Source Sequence:** This rule allows you to sort your data sources in order of most to least preferred for inclusion. It allows you to select based on your confidence in the data source. As an example, you can specify that the system use Commerce Cloud data first and S3 data last.

Match Rules

Match rules are customizable based on your business needs.

Match Rule Criteria
Add criteria for your match rule. Tell Me More

* Object: Select Object (1)
* Field: Select Attribute (2)
* Match Method: Select Match Method (3)

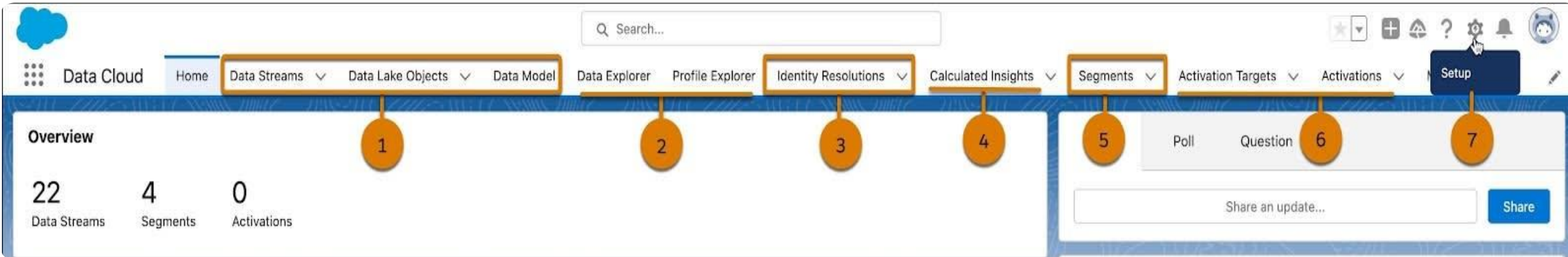
☐ Match on Blank

Add Criteria

* Match Rule Name
Custom Rule

Rule	Description
Last Updated	This rule specifies that the most recently updated value must be selected for inclusion in the unified profile. It's worth considering what data gets updated most regularly—would it be customer service data or perhaps Marketing Cloud Engagement preference data?
Most Frequent	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. Basically it allows you to select based on your confidence in the data source. As an example, you can specify that the system use Commerce Cloud data first and S3 data last.

Identity Resolutions



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Containers, Operators, and Logic

- Components of the Filter

1. Aggregation: Count, Sum Average, Max, Min

2. Operators: Date Numeric, Text, Boolean

3. Values: Is the data in question. Values are not case sensitive.

4. Logic: OR/AND

Any of these can be true = OR

All these things need to be true = AND

The screenshot shows a filter configuration interface with two filter rows. The first row is for 'Sales Order Product' with the aggregation 'Count' and the operator 'At Least' followed by the value '1'. The second row is for 'Product_Category' with the operator 'Is Equal To' and the value 'scarf'. The third row is for 'Sales Order Product' with the aggregation 'Count' and the operator 'At Least' followed by the value '1'. The fourth row is for 'Product_Description' with the operator 'Is Equal To' and the value 'yellow'. A logic container on the right is labeled 'AND'. Numbered callouts 1 through 4 point to the aggregation, operator, value, and logic container respectively. A plus icon and the text 'Add another Attribute here' are at the bottom.

1. Aggregation: Count At Least 1

2. Operators: Is Equal To scarf

3. Values: yellow

4. Logic: AND

+ Add another Attribute here