

Data Cloud Certified Consultant Prep



Data Cloud: Overview



More Data Than Ever





Data Cloud

A trusted hyperscale data engine
inside Salesforce

Integrates natively with Salesforce metadata

Power AI with unified CRM & engagement data

Open ecosystem of data lakes & models



2.4T+
average records
processed
per month

How Data Cloud Works

Data Systems

CRM



Cloud Storage



Data Lakes & Warehouses



Mobile & Web

APIs & SDKs

Legacy Systems

Connect at Hyperscale

Out-of-the-Box Connectors

MuleSoft Anypoint Platform

Bring Your Own Lake

Data Bundles

Streaming & Batch Data Ingestion

Streaming & Batch Data Transforms

Harmonize

Data Spaces

Data Models

Data Mapping

Identity Resolution

Data Graphs

Activate

Calculated Insights

Segmentation

Automations

Analytics

Open Access

Bring Your Own Lake
First-Party
Advertising
AppExchange
MuleSoft

Grounded AI

Segment Generation

Einstein Copilot Studio

Google Vertex AI Amazon
SageMaker



Data Cloud Does Two Things



It Makes Each Cloud & Industry Better

A screenshot of a Salesforce dashboard for Lauren Bailey. The dashboard includes a customer profile card with basic information like ID, email, phone, address, and loyalty tier. Below the card are two main sections: "Engagement History" and "Engagement Over Time". The "Engagement Over Time" chart shows a significant increase in engagement from August to August, with a peak around April. To the right of the chart is a sidebar with "Propensity to Buy" information, showing a score of 82, leading causes (Attended Webinar, CDP, Disaster Recovery Demo Request), and ways to improve (AE readout = True, New Project Created). At the bottom, there's a "Calculated Insights" section showing lifetime value (\$24,780).

...by connecting otherwise impossible data to Salesforce that enables entirely new use-cases and ways to use each cloud.

It Enables Trusted Generative AI

A screenshot of a Salesforce dashboard titled "Seller Home" with the message "Good morning. Let's get selling!". The dashboard features several circular KPIs: "\$470K Total Pipeline" (green), "23 Accounts" (red), "12 Upcoming Activity" (green), and "9 Upcoming Activity" (green). Below these are sections for "Close Deals" (opportunities owned by me closing this quarter) and "Plan My Accounts" (accounts owned by me). On the right side, the Einstein AI interface is shown, with a message from "Einstein" asking for help with search, summarize records, and draft emails. It also shows a "Cases" table with one entry: ID 0001031, Name Critical shipment is delayed, Status Escalated, Account Global Media, Contact Leanne Tomlin. A sidebar on the right says "Enter your input here...".

...by safely grounding an LLM in all company data while preserving data governance and security controls.

“

AI without Data is
pointless...

Data without AI is
worthless...





Partner Opportunities with Data Cloud



Customers Won't Ask For a 'Data Cloud'

When you hear customers
say these things 

We want to **increase agent productivity** by giving them quicker access to customer data 

Our **sales teams is bogged down by bad data** and it's hurting their productivity 

Our executives need to see the entire business across **multiple orgs** 

We just merged and need to **consolidate our Salesforce orgs** 

We need to **leverage data across our enterprise to forecast better** 

We need to **provide more personalized customer experiences** 

We want to **increase efficiency by using AI and automation** to improve employee's jobs 

We want **access to all the engagement data** to trigger **incredible real-time experiences** for customers 

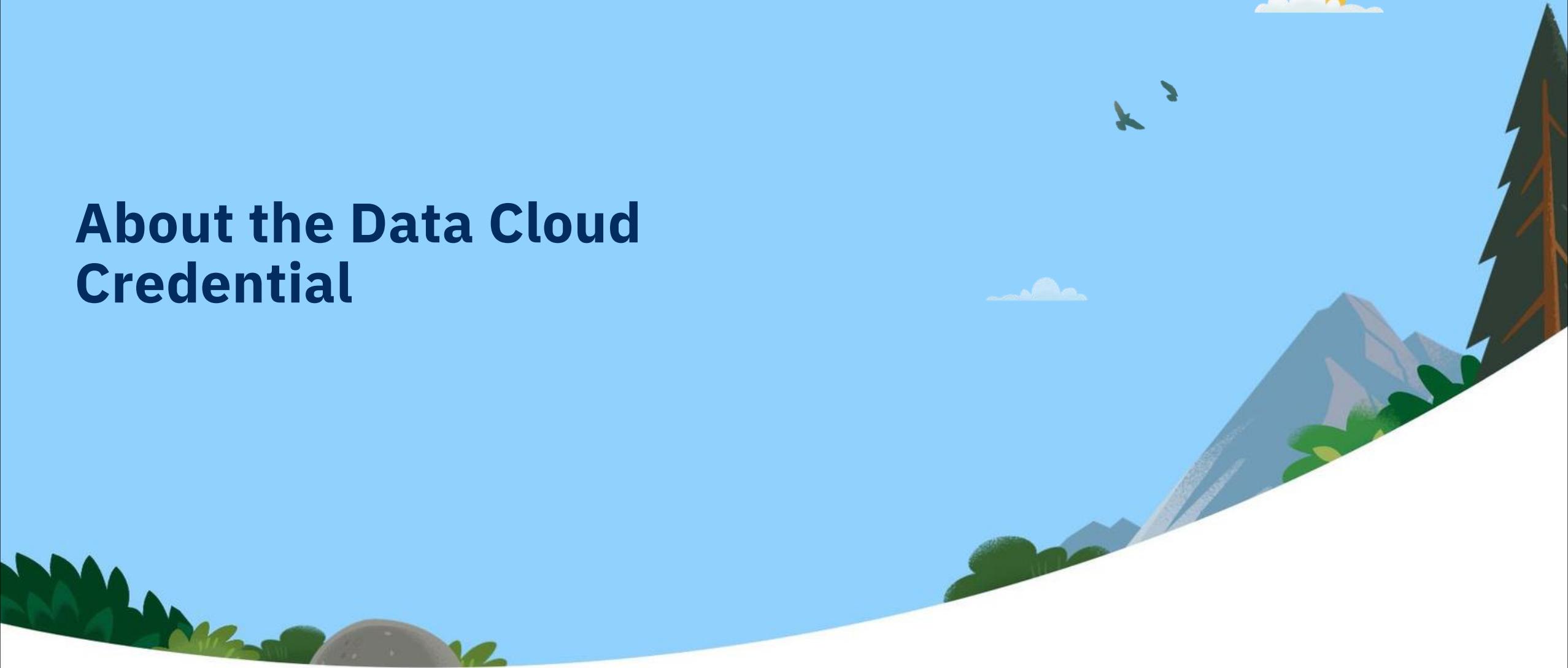
We need to get to a **single view of our customer** and their data 

We need **more intelligent insights to help our sales team know where to focus their time** to increase revenue and productivity 

We need to **improve productivity by automating** processes across orgs 



About the Data Cloud Credential





Salesforce Certified Data Cloud Consultant

Total Question
60

Allotted Time
105 min

Passing Score
62 %



Who should take the Data Cloud Consultant Exam?

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





Salesforce Certified Data Cloud Consultant

Total Question

60

Allotted Time

105 min

Passing Score

62 %



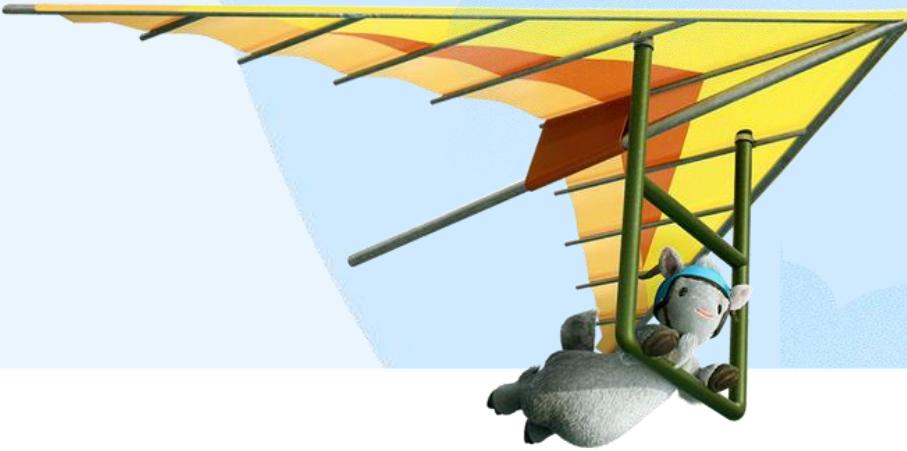
Exam Outline





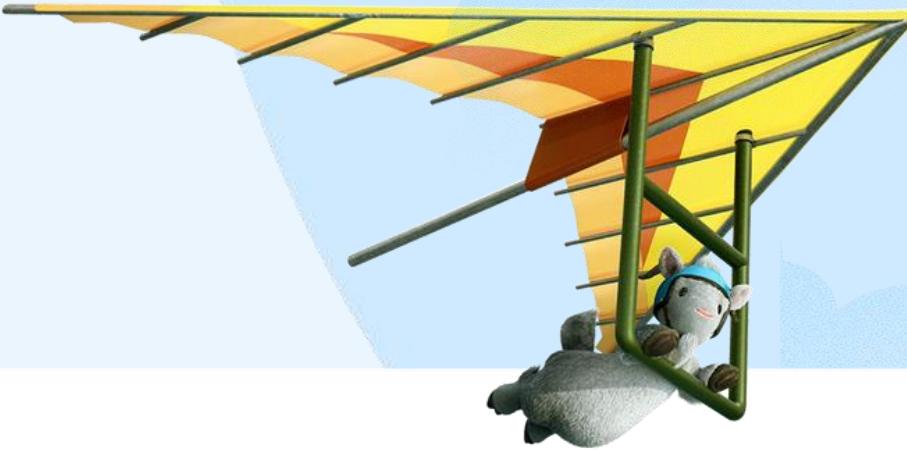
Data Cloud: Solution Overview





Question: ***What do you believe is the number one value of
Salesforce?***





Question: ***What do you believe is the number one value of
Salesforce?***

TRUST



Data Ethics

Data ethics are moral guidelines governing the gathering, protection, use, and sharing of data and how it affects individuals. This is particularly important for personal data.

- Use and Collect Individual Information Appropriately
- Provide Clear Exchange of Value for Data
- Treat Sensitive Data Carefully
- Collect and Use Only What's Necessary
- Choose Partners Carefully



Why Use Data Cloud



What it Does

- Harmonizes disparate data
- Unifies profiles with related data
- Build insights on unified profiles
- Segment harmonized data
- Activate data to drive relevant experiences

Value

Connect, Ingest, Federate

Unify all your customer data at scale, from any source, with out-of-the-box connectors

Harmonize, Unify, Predict

Anticipate customer needs and preferences with unified profiles that adapt to their activity in real time.

Understand and Act

Empower teams to create intelligent, automated experiences across the Customer 360 with unified data.

What it's NOT

- Data cleansing
- Master data management
- Golden Record
- Data governance
- Backup and disaster recovery
- Business Intelligence platform

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



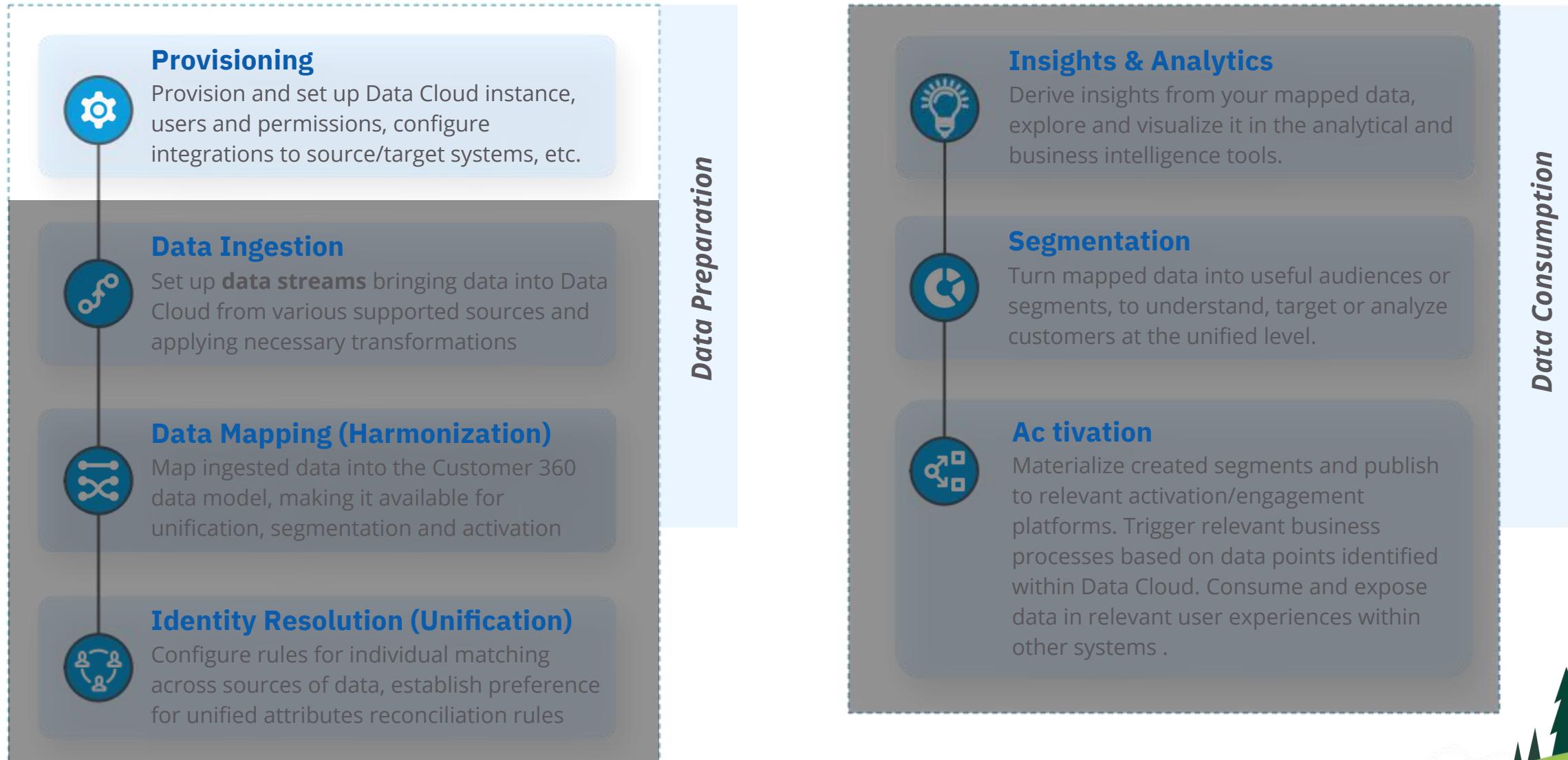


Data Cloud: Setup



The Big Picture: Implementation Themes

Related to the components of Data Cloud



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



Separate Data Cloud Home Org

Data Cloud can be provisioned in a new Salesforce Core Platform Org that exists

as a **system of reference**, with connections to any number of data orgs

(e.g. Sales, Service Clouds).

Using a Data Org for Data Cloud Home

Data Orgs are any new or existing Salesforce Core Platform Org that exists as a **system of record**, managing and *mastering* customer data (e.g. Sales, Service Clouds).

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: Provisioning



Data Cloud: Admin & Provisioning



- Set up Data Cloud Admin by assigning one of following permission sets to an existing admin user:
 - **Data Cloud Admin** (*Data Cloud Permission Set License*)
 - **Data Cloud Marketing Admin** (*Customer Data Cloud for Marketing Permission Set License*)
- As Data Cloud Admin, Provision/Enable Data Cloud by clicking on **Data Cloud Setup**
- **Data Cloud User** can only **VIEW** Data Cloud features

A screenshot of the Salesforce interface. On the left, there's a sidebar with icons for Setup, Data Cloud Setup, Your Account, and Developer Console. The main area shows a search bar with 'Data Cloud' typed in, a list of apps under 'Apps' (including 'Data Cloud' which is highlighted), and a list of items under 'Items' (No results). To the right, there's a table of permission sets with their descriptions and licenses.

Permission Set Label	Description	License
Data Cloud Admin	Allows access to Data Cloud features and administration.	Data Cloud
Data Cloud User	Allows access to view Data Cloud features.	Data Cloud
Data Cloud for Marketing Admin	Allows access to all Data Cloud features and administration.	Customer Data Cloud for Marketing
Data Cloud for Marketing Data Aware Specialist	Allows access to Data Cloud, create and manage data sources, register activation channels, and create reports and dashboards.	Customer Data Cloud for Marketing
Data Cloud for Marketing Manager	Allows access to Data Cloud, manage the overall segmentation process, and create reports and dashboards.	Customer Data Cloud for Marketing
Data Cloud for Marketing Specialist	Allows access to Data Cloud and create, manage, and publish segments.	Customer Data Cloud for Marketing

Data Cloud: User Management



- To manage Data Cloud Users and their permissions, you must be a Data Cloud Admin and have a Salesforce administrator profile or permission set that grants access to Salesforce Setup.
- Standard Data Cloud Permission Sets, highly recommended to use these Permission Sets instead of creating custom Permission Sets
- To expose Salesforce objects to Data cloud, user should have **READ and VIEW ALL** permission

Permission Set Label ↑	Description	License
Data Cloud Admin	Allows access to Data Cloud features and administration.	Data Cloud
Data Cloud User	Allows access to view Data Cloud features.	Data Cloud
Data Cloud for Marketing Admin	Allows access to all Data Cloud features and administration.	Customer Data Cloud for Marketing
Data Cloud for Marketing Data Aware Specialist	Allows access to Data Cloud, create and manage data sources, register activation channels, and create reports and dashboards.	Customer Data Cloud for Marketing
Data Cloud for Marketing Manager	Allows access to Data Cloud, manage the overall segmentation process, and create reports and dashboards.	Customer Data Cloud for Marketing
Data Cloud for Marketing Specialist	Allows access to Data Cloud and create, manage, and publish segments.	Customer Data Cloud for Marketing

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.

5

Proceed with Implementation

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



Let's See Data Cloud in Action



**DEMO
TIME|**



Setup Your Instance



- 1. Create Data Cloud Developer Edition org**
- 2. Assign User Permissions**
- 3. Configure Additional Permissions**
- 4. Provision Your Instance**





Data Cloud: Topology



Data Sources Connectors



Connected Sources

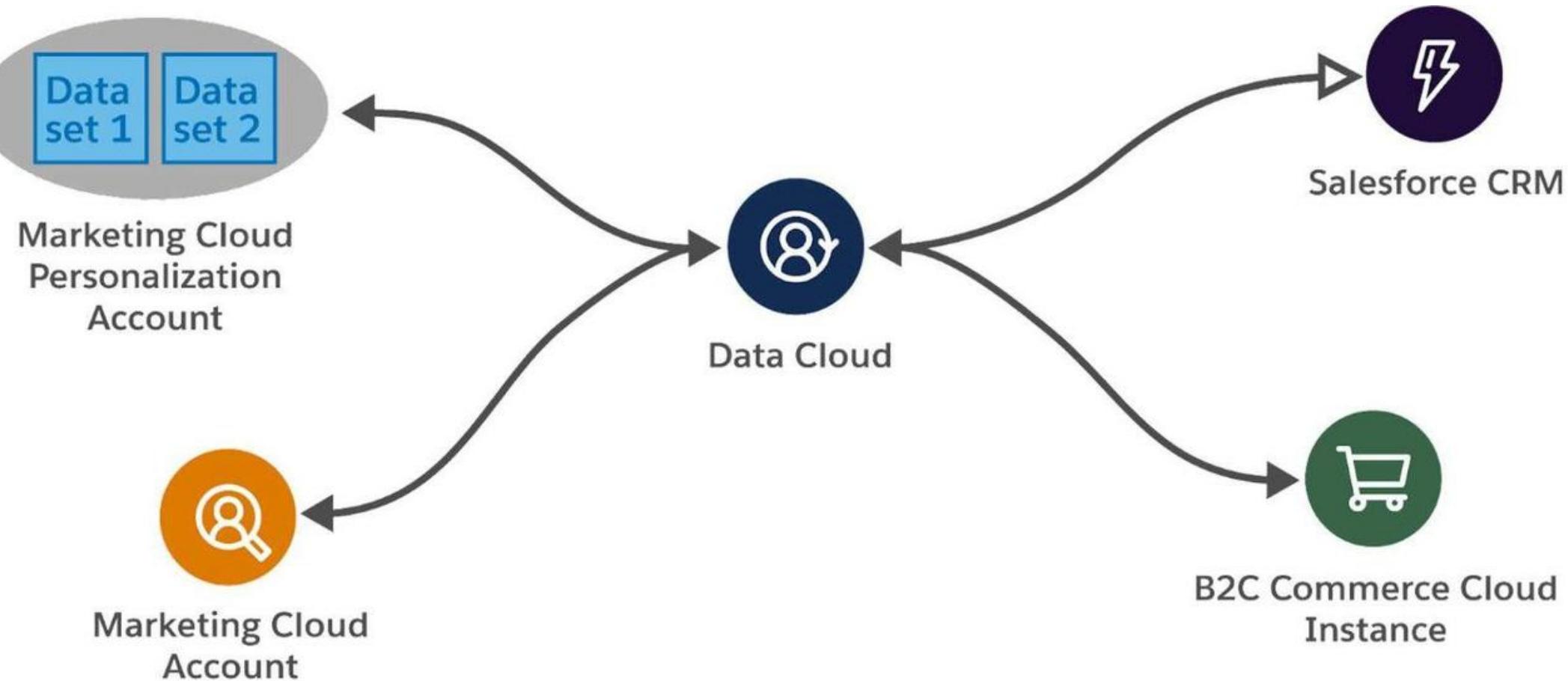
 Marketing Cloud Starter data bundles and Data Extensions	 Salesforce CRM Import objects from Salesforce CRM	 B2C Commerce Import objects from B2C Commerce	 Mobile App Import events from iOS and Android applications
 Website Import events from your connected websites.	 Ingestion API Stream and/or bulk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

Data Cloud Topology



Data Cloud - OOTB Connectors



Salesforce Clouds

- CRM
- Marketing Cloud
- B2C Commerce
- Marketing Cloud Personalization

Connectors & Integrations

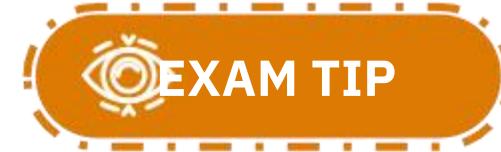
- Amazon S3
- Google File Storage
- SFTP Connector
- Azure Storage
- PostgreSQL
- Meta Ads
- Google Ads
- Amazon Kinesis

API and Mobile

- Web SDK
- Mobile SDK
- Ingestion APIs

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 Personalization

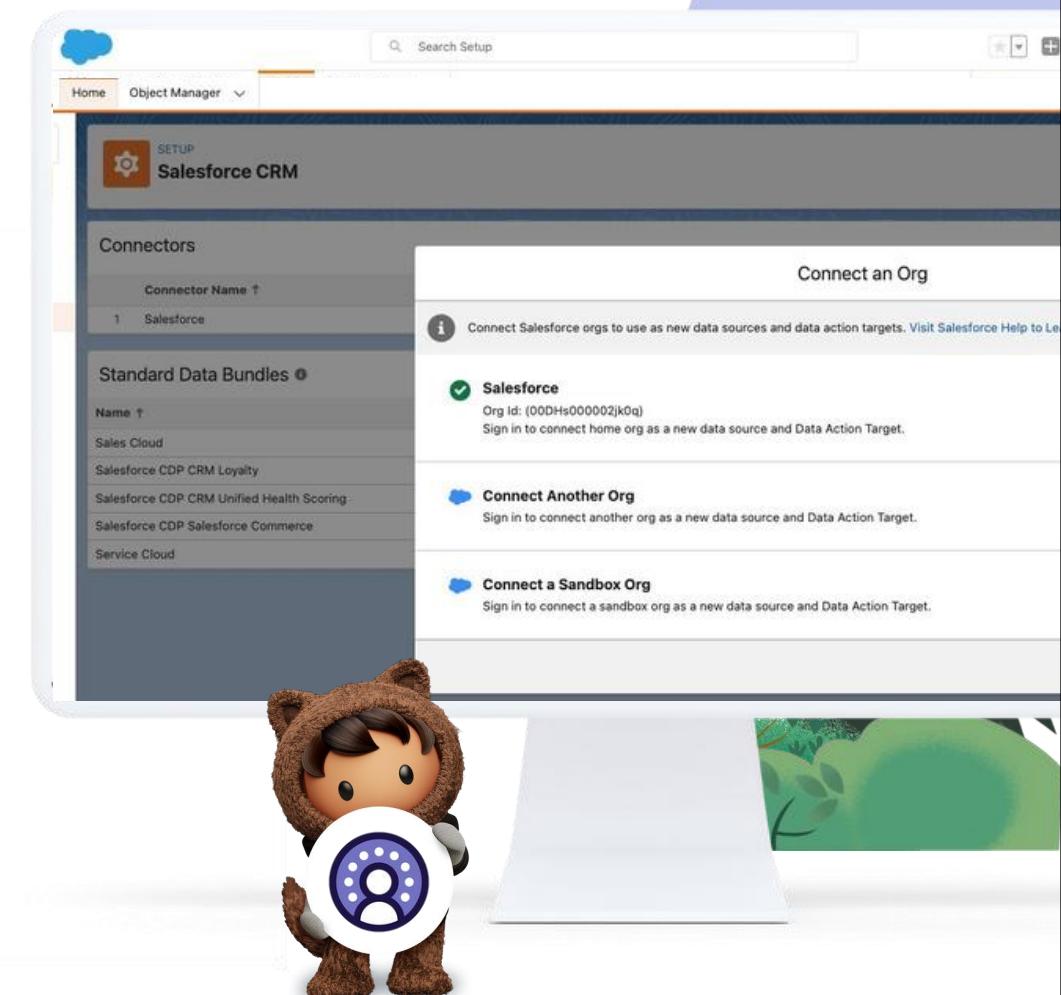
Salesforce CRM Connector



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.

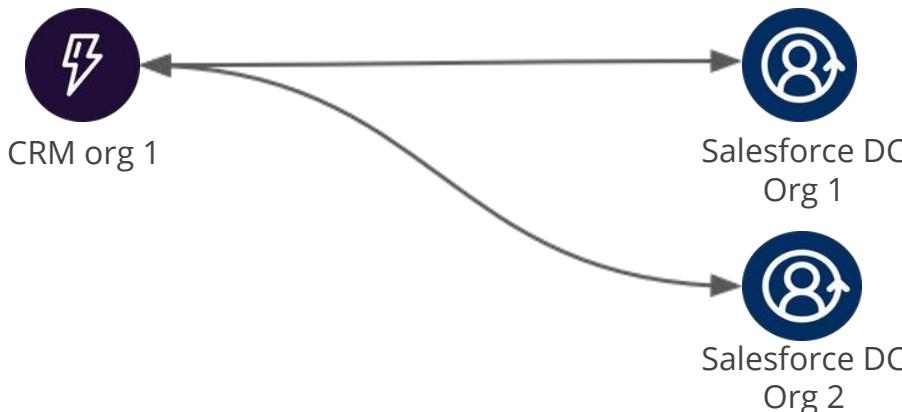


CRM - Data Cloud Topology



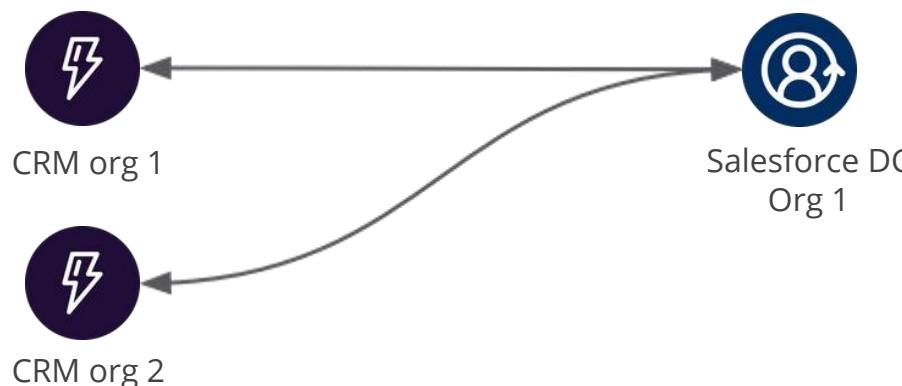
1 CRM org to 1 DC Org
(1:1)

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.



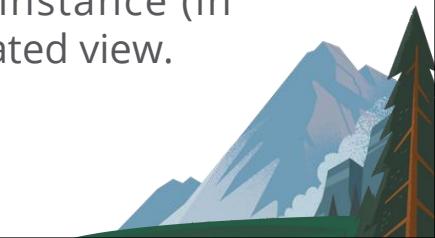
1 CRM org to Multiple
DC Orgs (1:n)

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



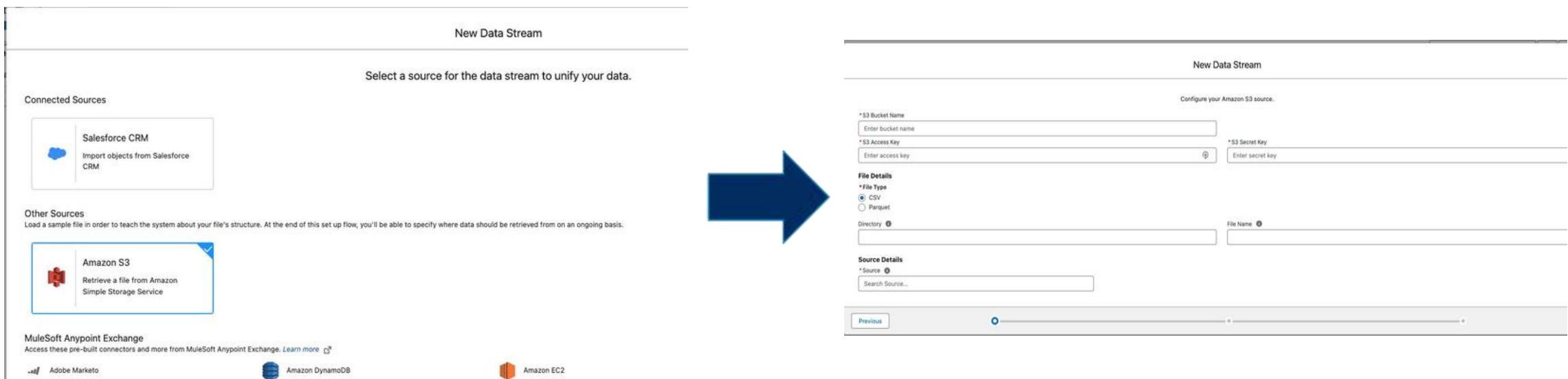
Multiple CRM orgs to
a single DC Org (n:1)

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

- Let's 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



The screenshot shows two steps of a "New Data Stream" configuration process:

Step 1: Select a source for the data stream to unify your data.

- Connected Sources:** Salesforce CRM (selected)
- Other Sources:** Amazon S3 (selected)

Step 2: 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 (selected)
- Source Details:** *Source: Search Source...

A large blue arrow points from the "Select a source" step to the "Configure your Amazon S3 source" step.



Let's See Data Cloud in Action



**DEMO
TIME|**



Prepare Your Data



- 1. Update Connection Name as Salesforce – Home Org**
- 2. Service Cloud Bundle Package Installation**
- 3. Salesforce CRM Data – Install Learning Package**
- 4. Initialize data using Flow & Verify Data**
- 5. Create Amazon S3 account**
- 6. Upload files to S3 bucket within folder ecommerce-data**



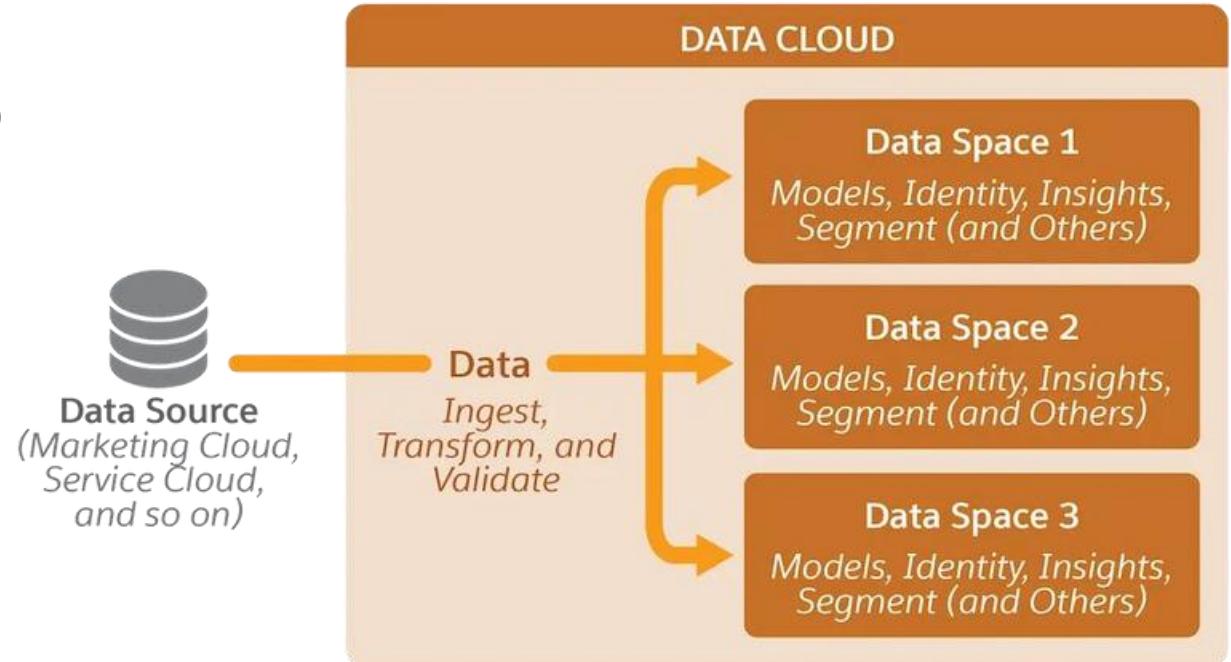
Data Spaces



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 et c

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

Q&A



salesforce

Thank you

