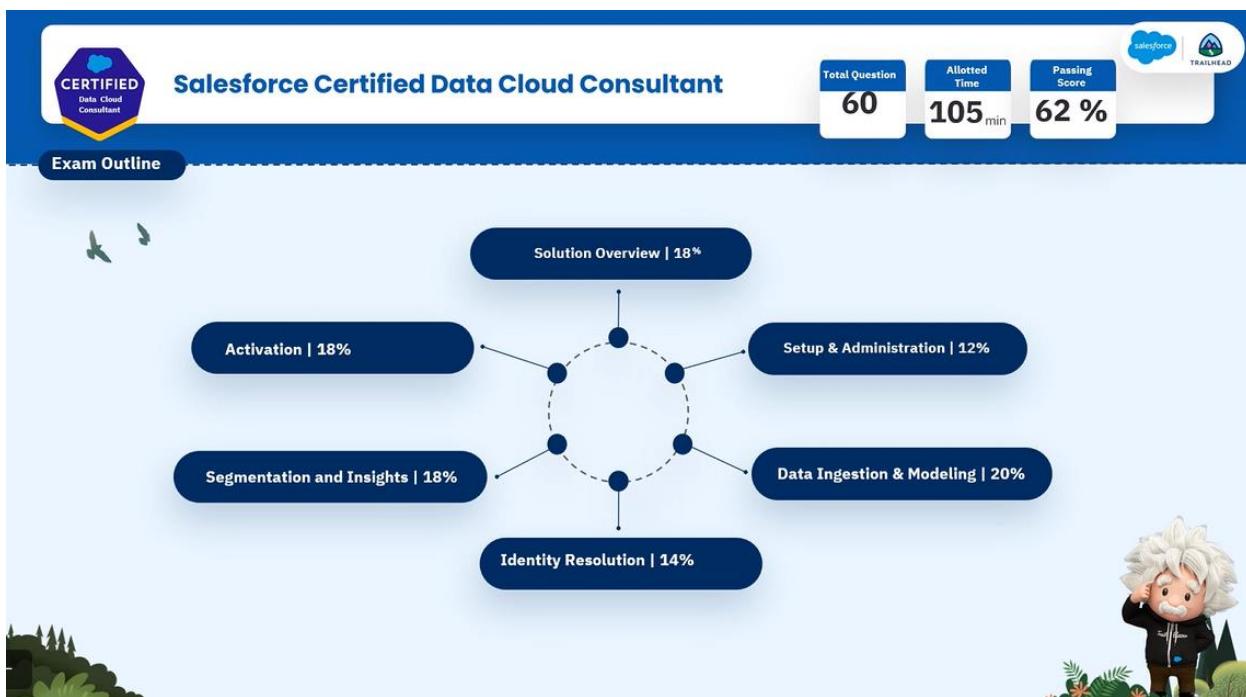
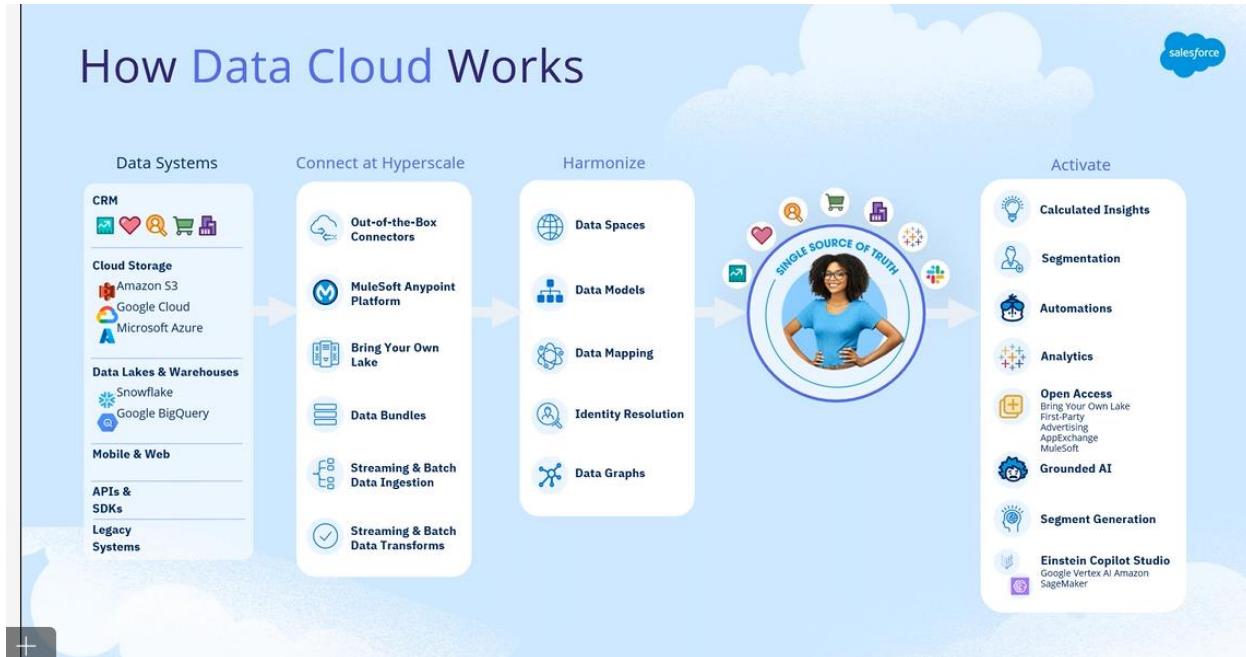


How Data Cloud Works



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

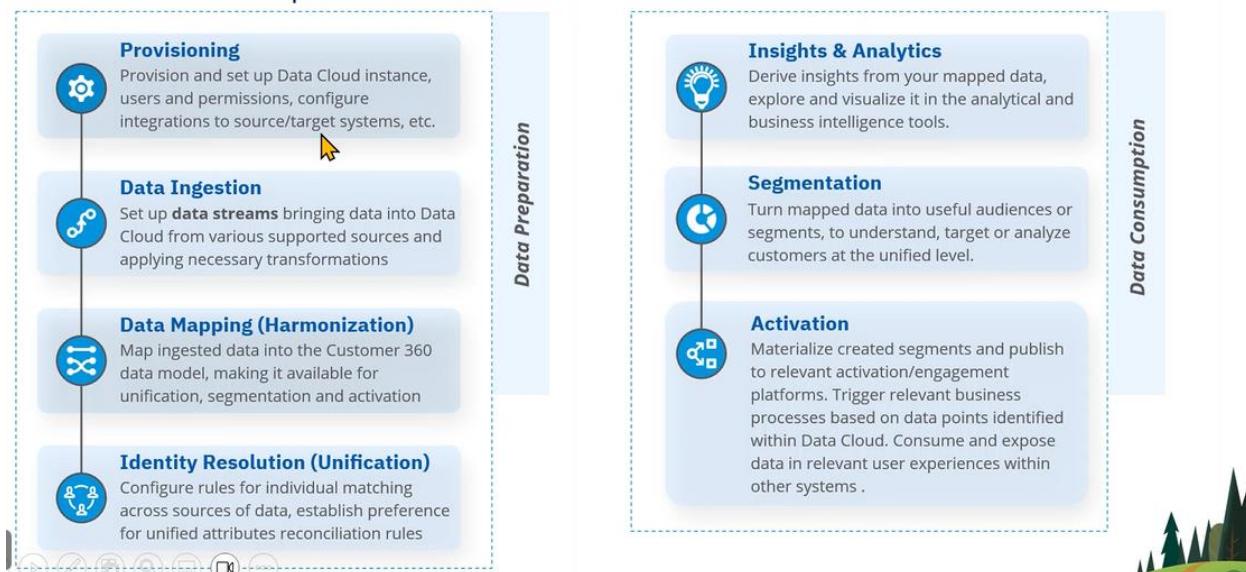
Data cleansing
Master data management
Golden Record
Data governance
Backup and disaster recovery
Business Intelligence platform

Pre-work courses: [Capabilities & Use Cases](#)

The Big Picture: Implementation Themes



Related to the components of Data Cloud



Data Cloud set-up

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

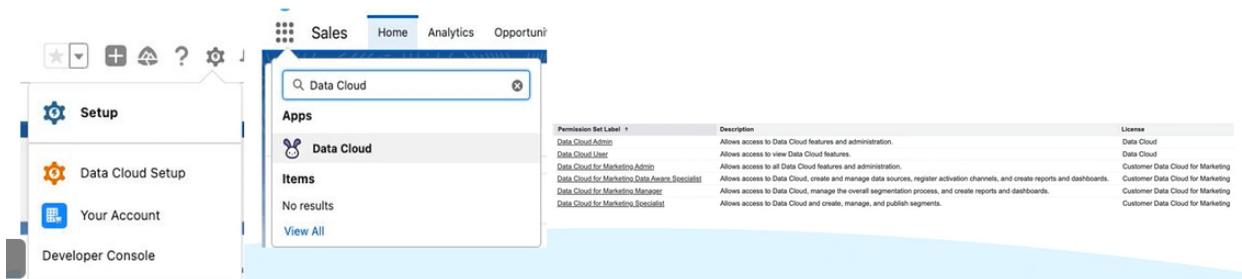
Considerations around workflow, data governance, org administration, security models, integrations and others also influence a customer's decision on where CDP should be deployed



Data Cloud: 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



Data Cloud Initial Configuration Steps

EXAM TIP

salesforce

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.

Demo

Setup Your Instance



salesforce

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



DC Developer Edition Org Signup:

<https://www.salesforce.com/form/developer-signup/?d=pb>

Developer Edition with Agentforce and Data Cloud - Salesforce.com

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

<https://www.salesforce.com/form/developer-signup/?d=pb>

apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

First name: Monish ✓ Last name: Aditya ✓

Job title: Instructor ✓ Work email: monish.aditya@y.

Company: Accenture ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

Sign Me Up

User name:

Swatishalini2024942@agentforce.com

[Free Trial - Salesforce IN](#)

[Thank you — your trial is on the way - Salesforce IN](#)

Loggedin: [Home | Salesforce](#)

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected. A search bar at the top right contains 'permis'. The main content area is titled 'Allow modification for date fields' under 'PERMISSION SET 'ALLOW MODIFICATION FOR DATE FIELDS' > MANAGE ASSIGNMENTS'. It displays an 'Assignment Summary' table with one row for 'Swati Shalini' assigned to 'Salesforce'. A success message 'Success' is shown at the bottom right. A 'Done' button is at the bottom right of the main content.

The screenshot shows the Salesforce Setup interface with 'Users' selected in the sidebar. The main content area is titled 'Users' and shows 'No records to display'. Below it is a section for 'Authentication Settings for External Systems' with a 'New' button and 'Authentication Settings for External Systems Help'. Another section below is 'Login History' with a table showing two logins from '6/15/2025, 10:03:33 PM PDT' and '6/15/2025, 9:49:47 PM PDT'. A download link 'Download login history for last six months, including logins from outside the website, such as API logins. (Excel_csv file)' is provided. At the bottom is a section for 'User Provisioning Accounts' with 'No records to display'.

SETUP

Users

User
Swati Shalini

Permission Set Assignments [5+] | Permission Set Assignments Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [5+] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [2+] | User Provisioning Accounts [0]

User Detail

Edit Sharing Change Password View Summary

	Name	Role
Name	Swati Shalini	
Alias	swa	User License
Email	swatishalini2024@gmail.com [Verified]	Profile
Username	swatishalini2024942@agentforce.com	Active
Nickname	User17500493102378858009	Marketing User
Title		Offline User
Company	Accenture	Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User

Click Get Started



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
---	--	---



Cloud icon

Search Setup

Home Object Manager

Developer Tools

SALESFORCE INTEGRATIONS

- Data Cloud One
- Salesforce CRM
- Marketing
- Commerce Cloud

EXTERNAL INTEGRATIONS

- External Activation Platforms
- Snowflake
- Websites & Mobile Apps
- Ingestion API
- Other Connectors
- Private Connect

Welcome to Data Cloud

Harness the power of Data Cloud to unify all your company's data into a holistic view of each customer. Data Cloud consolidates data from all your source systems into Customer 360 profiles to help you understand your customers, empower your teams, and drive business decisions. Use Data Cloud's unified profile data to drive automation and analytics, personalize engagements, and power trusted AI.

Data Cloud Guidance

Learn About Data Cloud

Salesforce Data Cloud

Data Streams

Recently Viewed

0 items • Updated a few seconds ago

New Delete Data Stream Update Status

Search this list...

Data Stream Name Data Connecto... Stream Type Last Run Status Data Stream St... Last Processed ... Total Records Last Refreshed

You haven't viewed any Data Streams recently.
Try switching list views.

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.

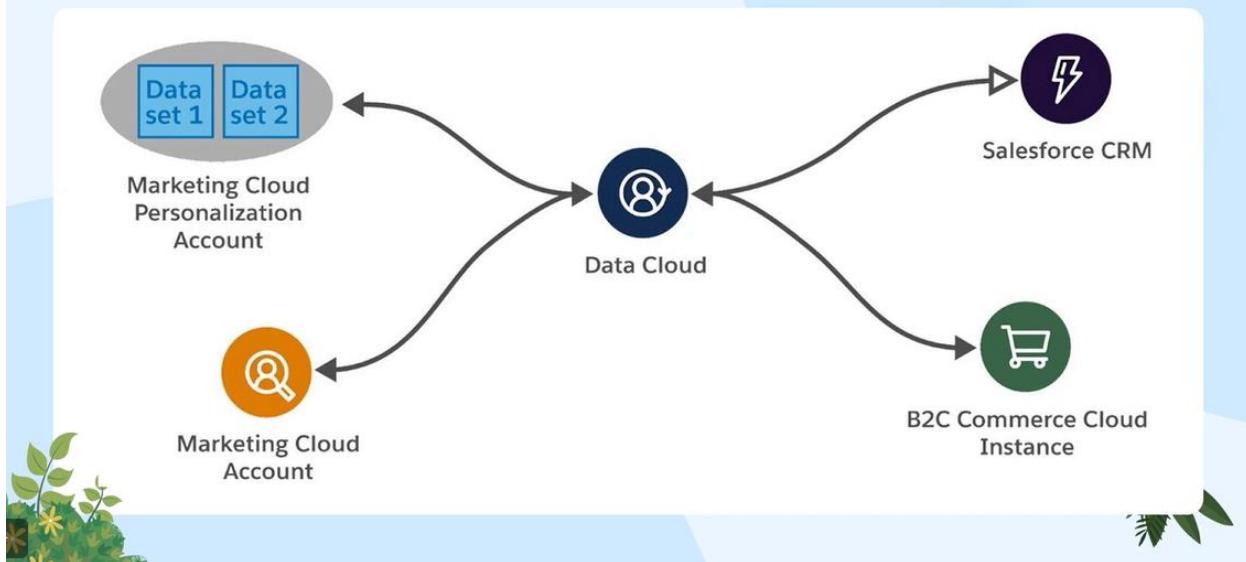
- Amazon S3: Retrieve a file from Amazon Simple Storage Service
- Google Cloud Storage: Retrieve a file from Google Cloud Storage.
- MuleSoft Anypoint Platform: Use Ingestion API to bring in data from the MuleSoft Anypoint Platform. [Learn More in MuleSoft](#)

A large blue circle highlights the MuleSoft Anypoint Platform connector.

Data Cloud Topology

EXAM TIP

salesforce



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.

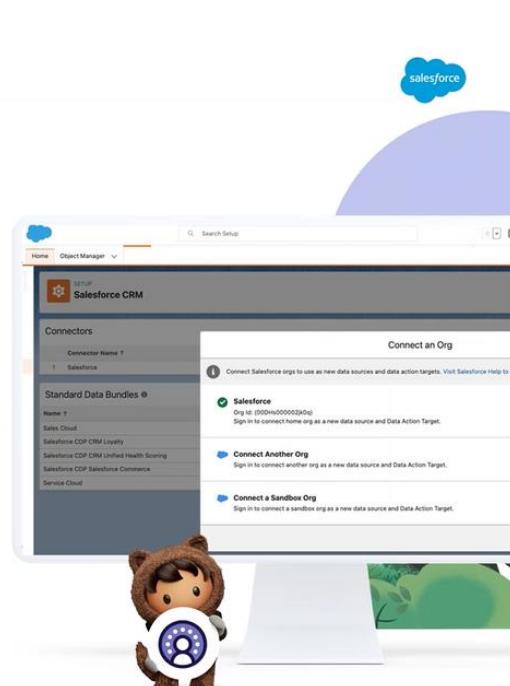
- Sales Cloud
- Service Cloud
- Salesforce Loyalty
- Salesforce Unified Health Scoring
- Salesforce B2C Commerce
- Salesforce Marketing Cloud
- Salesforce Marketing Cloud Personalization

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



CRM org 1



Salesforce DC Org 1

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.



CRM org 1



Salesforce DC Org 1

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

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



CRM org 1



Salesforce DC Org 1

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 the Salesforce Data Cloud Setup interface. On the left, there's a sidebar with categories like Feature Manager, Admin Tools, Developer Tools, SALESFORCE INTEGRATIONS (Data Cloud One, Salesforce CRM, Marketing, Commerce Cloud), and EXTERNAL INTEGRATIONS (External Activation Platforms, Snowflake, Websites & Mobile Apps, Ingestion API, Other Connectors, Private Connect). A yellow circle highlights the 'Other Connectors' link. The main area is titled 'Salesforce CRM' and shows 'Standard Connections' with one entry: Accenture (Alias: Home, Status: Active, Last Updated: May 19, 2025, 09:38 PM, Org Id: 00DgK000003aNAr). Below that is 'Standard Data Bundles' with entries for Sales Cloud, Salesforce CDP CRM Loyalty, Salesforce CDP CRM Unified Health Scoring, Salesforce CDP Salesforce Commerce, and Service Cloud. A yellow circle highlights the 'New' button in the top right corner.

Click New

Select amazon S3

The screenshot shows the 'New Amazon S3 Source' configuration dialog. It has two main sections: 'Authentication Details' and 'Connection Details'. Under 'Authentication Details', there are two options: 'Access Key/Secret Based' (selected) and 'Identity Provider Based'. The 'Access Key/Secret Based' section requires entering 'AWS access key' and 'AWS secret access key'. Under 'Connection Details', it requires 'Bucket Name' (Enter Bucket Name) and 'Parent Directory' (Enter Parent Directory, default is '/'). There are 'Test Connection' and 'Save' buttons at the bottom. A yellow circle highlights the 'Enter connection name...' field, which is currently empty.

Let's See Data Cloud in Action



The screenshot shows the Data Cloud Setup Home page in a web browser. The URL in the address bar is `orgfarm-50c38b528a-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home`. The browser toolbar includes various icons for productivity tools like PDI, MeetingRoom, Shuttles, GFT, MyTe, AllSec, PLC, SeatBook, Acc Updation.xlsx, Teams, D2L, draw.io, OverDrive, Magzter, and Mail.

The main content area features a large blue banner with the text: "Harness the power of Data Cloud to unify all your company's data into a holistic view of each customer. Data Cloud consolidates data from all your source systems into Customer 360 profiles to help you understand your customers, empower your teams, and drive business decisions. Use Data Cloud's unified profile data to drive automation and analytics, personalize engagements, and power trusted AI." Below the banner is a section titled "Learn About Data Cloud" with a sub-section "Your Home Org Details". It states: "Your Data Cloud instance is live and connected to your home org." A table provides details: **Home Org ID**: 00DgK000003aNAr; **Home Org Instance**: CDP2-AWS-PROD8-CACENTRAL1; **Tenant Endpoint**: g-ztgylbgzstc9jsrmfswmmbsm0.c360a.salesforce.com; **Data Spaces**: 1; **Connections**: 1. At the bottom, there is a section titled "Set Up Data Cloud".

 Data Cloud Setup

Home Object Manager ▾

Quick Find

Data Cloud Setup Home

USER MANAGEMENT

Permission Sets

Users

SETUP Data Cloud Setup

Create ▾

Welcome to Data Cloud

Harness the power of Data Cloud to unify all your company's data into a holistic view of each customer. Data Cloud consolidates data from all your source systems into Customer 360 profiles to help you understand your customers, empower your teams, and drive business decisions. Use Data Cloud's unified profile data to drive automation and analytics, personalize engagements, and power trusted AI.

Data Cloud Guidance



Learn About Data Cloud

Check credit consumption Open Digital Wallet

Data Cloud Setup Home

USER MANAGEMENT

Permission Sets

Users

Set Up Data Cloud

Lay the groundwork to get started.

Set Up Your Data Cloud Instance

This process runs automatically. You can navigate away while it's in progress.

Automated Steps

Just a heads-up... X

We're setting up your metadata. This could take a few minutes.

Initializing the Customer 360 Data Model

Making sure everything is ready to go

Clicked Get Started

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**

The screenshot shows the Salesforce Data Cloud Setup interface. On the left, there's a sidebar with navigation links for Feature Management, Salesforce Integrations (Data Cloud One, Salesforce CRM, Marketing, Commerce Cloud), and External Integrations (External Activation Platforms, Snowflake, Websites & Mobile Apps, Ingestion API). The main content area has tabs for SETUP and Object Manager, with SETUP selected. Under SETUP, the "Salesforce CRM" tab is active. It displays two tables: "Standard Connections" and "Standard Data Bundles".

Standard Connections

Connection Name	Alias	Connection Status	Last Updated	Org Id
Salesforce - Home Org	Home	Active	May 19, 2025, 09:38 PM	00DgK000003aNAr

Standard Data Bundles

Name	Installed Version	Latest Version
Sales Cloud	--	1.3
Salesforce CDP CRM Loyalty	--	1.7
Salesforce CDP CRM Unified Health Scoring	--	1.3
Salesforce CDP Salesforce Commerce	--	1.11
Service Cloud	--	6.0

Install Service Cloud
By CDP CRM 1

Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Service Cloud	CDP CRM 1	Spring 2022	1.2

Search Setup

Home Object Manager

Quick Find

Data Cloud Setup

Installed Packages

Help for this Page

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce Standard Data Model	Salesforce	1.93	ssot	5/19/2025, 9:28 AM		0	0	0	Not Passed
Description	This package contains the Standard Data Model derived from the Cloud Information Model used in Customer 360 Audiences and SSOT.									
Uninstall	CDPAdvertising	Salesforce	3.14	cdpacvstrgptmr	5/19/2025, 9:07 AM	✓	0	0	0	Passed
Uninstall	ServiceCloud	CDP CRM 1	1.2	cdp_crm_dk2	6/15/2025, 11:02 PM		0	0	0	Passed

Uninstalled Packages

Visit AppExchange »

The screenshot shows the Salesforce CRM Setup interface. On the left, a sidebar menu includes options like Data Cloud Setup Home, USER MANAGEMENT (Permission Sets, Users), FEATURE MANAGEMENT (Data Spaces, Feature Manager, Admin Tools, Developer Tools), SALESFORCE INTEGRATIONS (Data Cloud One, Salesforce CRM, Marketing), and a section for recently viewed items. The main content area is titled "Salesforce CRM" and displays two tables: "Standard Connections" and "Standard Data Bundles".

Standard Connections

Connection Name	Alias	Connection Status	Last Updated	Org Id
Salesforce - Home Org	Home	Active	May 19, 2025, 09:38 PM	00DgK000003aNAr

Standard Data Bundles

Name	Installed Version	Latest Version
Sales Cloud	--	1.3
Salesforce CDP CRM Loyalty	--	1.7
Salesforce CDP CRM Unified Health Scoring	--	1.3
Salesforce CDP Salesforce Commerce	--	1.11
Service Cloud	1.2	6.0

This screenshot shows the same Salesforce CRM Setup interface as the first one, but with a different view of the "Standard Data Bundles" table. The table now highlights the "Service Cloud" row, which has been selected.

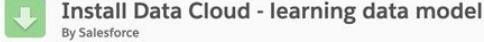
Name	Installed Version	Latest Version
Sales Cloud	--	1.3
Salesforce CDP CRM Loyalty	--	1.7
Salesforce CDP CRM Unified Health Scoring	--	1.3
Salesforce CDP Salesforce Commerce	--	1.11
Service Cloud	1.2	6.0

i.e.g. something like <https://mydc-dev-ed.lightning.force.com/packaging/installPackage.apexp?p0=04tDm000000yOj>

ii.where mydc-dev-ed.lightning.force.com is the top level domain of my org

b. Alternatively you can also click on this link and login with your org credentials:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tDm000000yOj&isdt=p=p1>

2. Choose Install For Admin Only option and install the package:



Recently Viewed | Data Stream > Install Package

orgfarm-50c38b528a-dev-ed.develop.lightning.force.com/packagingSetupUI/iP Landing.app?apvId=04tDm000000yOj

⚠ What if existing component names conflict with ones in this package?

Do not install.
 Rename conflicting components in package.


Install for Admins Only


Install for All Users


Install for Specific Profiles...

 Install Cancel

App Name	Publisher	Version Name	Version Number
Data Cloud - learning data model	Salesforce	Spring 2023 - Apr 19	1.4

Description
Follow instructions in this guide to complete data initialization in your org.

Install Data Cloud - learning data model

By Salesforce

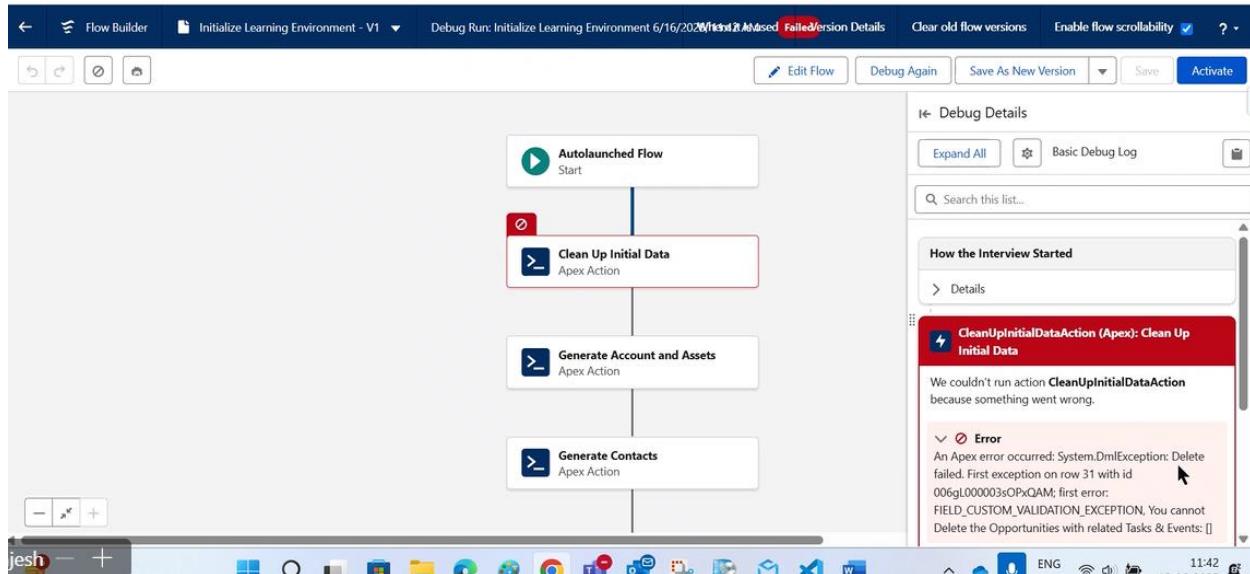
Installing and granting access to admins Only...

App Name	Publisher	Version Name	Version Number
Data Cloud - learning data model	Salesforce	Spring 2023 - Apr 19	1.4

Description
Follow instructions in this guide to complete data initialization in your org.

Additional Details View Components

The screenshot shows the Salesforce Flow Builder interface. The top navigation bar includes links for PD1, MeetingRoom, Shuttles, GFT, MyTe, AllSec, PLC, SeatBook, Acc Updation.xlsx, Teams, D2L, draw.io, OverDrive, Magzter, Mail, and a Help icon. The current tab is 'Flow Builder' with the title 'Initialize Learning Environment - V1'. The flow itself is titled 'Autolaunched Flow' and starts with a 'Start' action. It then branches into three parallel steps: 'Clean Up Initial Data', 'Generate Account and Assets', and 'Generate Contacts', each using an 'Apex Action' component. The flow ends with a final 'Apex Action' step. The status bar at the bottom indicates the flow was last saved on 6/16/2025, 11:36 AM, and shows buttons for Run, Debug, Save As New Version, Save, and Activate. A yellow cursor arrow points to the 'Run' button.



Recently Viewed | Rentals | Sale | Installed Packages | Salesforce | Flows | Salesforce | Initialize Learning Environment

Vehicle Rentals Rentals Bookings Contacts Rental Preferences Cases Accounts

Recently Viewed

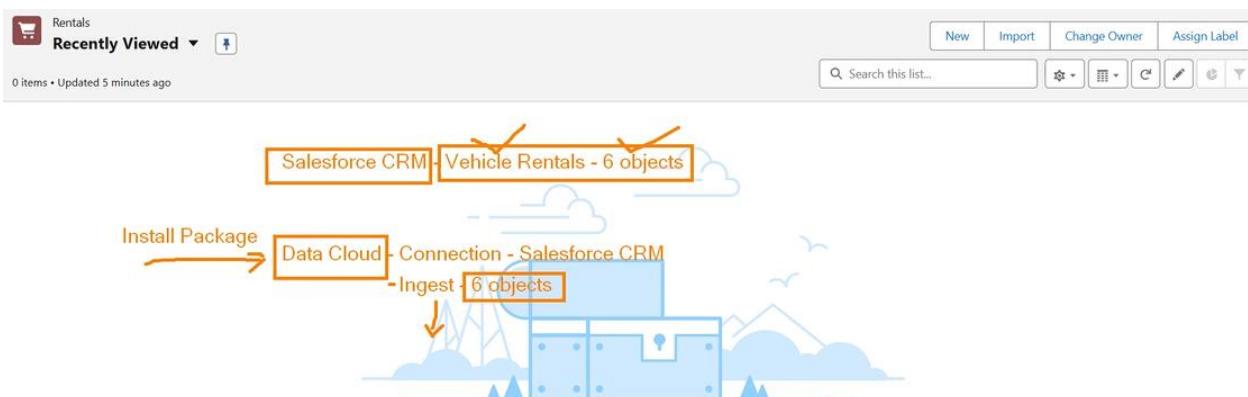
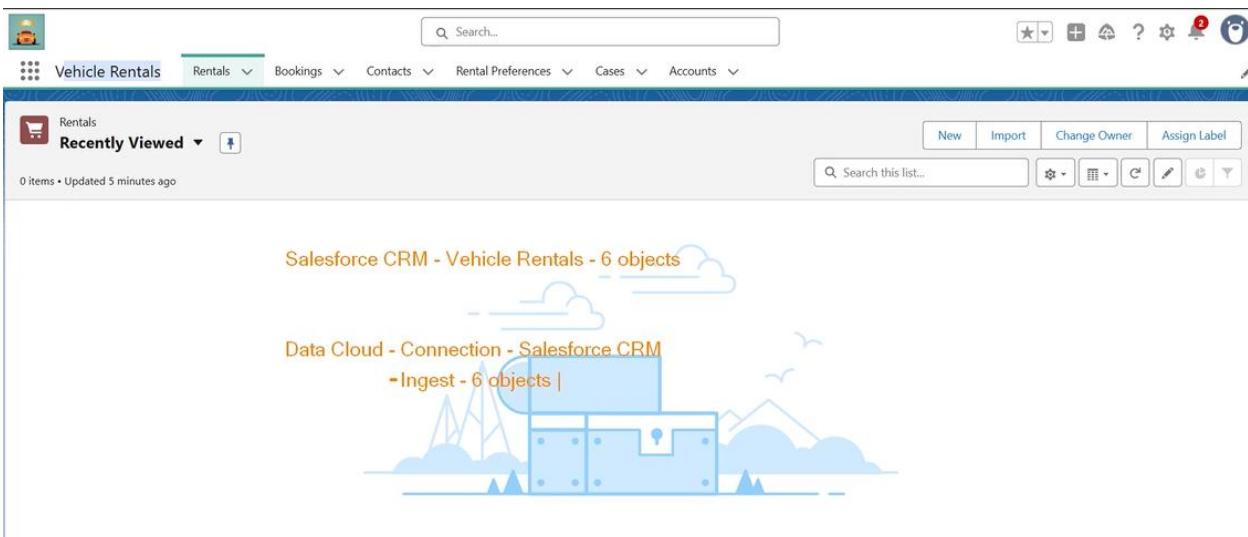
Salesfo

Nothing to see here

MK khan, Mujeeb
But I think it'll take some time for me to understand it, yeah.

MA Aditya, Monish
Once you go through you'll get an idea because we have external CRM systems for external CRM systems you can load the data so you have your external Salesforce CRM so Salesforce CRM

Vehicle Rentals		Rentals	Bookings	Contacts	Rental Preferences	Cases	Accounts										
								New	Import	Change Owner	Printable View	Assign Label					
								<input type="text" value="Search this list..."/> Search Grid Form Print Export Filter									
22 items • Sorted by Rental ID • Updated an hour ago																	
<input type="checkbox"/> Rental ID ↑																	
1	<input type="checkbox"/>	R-202506-0022															
2	<input type="checkbox"/>	R-202506-0023															
3	<input type="checkbox"/>	R-202506-0024															
4	<input type="checkbox"/>	R-202506-0025															
5	<input type="checkbox"/>	R-202506-0026															
6	<input type="checkbox"/>	R-202506-0027															
7	<input type="checkbox"/>	R-202506-0028															
8	<input type="checkbox"/>	R-202506-0029															
9	<input type="checkbox"/>	R-202506-0030															
10	<input type="checkbox"/>	R-202506-0031															
11	<input type="checkbox"/>	R-202506-0032															



monish.aditya@accenture.com

Create Amazon S3 account steps:

https://signin.aws.amazon.com/signup?request_type=register

Sign-up & Singn In, reset password

The screenshot shows the AWS Console Home page for the eu-north-1 region. The top navigation bar includes the AWS logo, a search bar, and user information for nitin.munjani@gmail.com. The main content area has two main sections: 'Recently visited' (empty) and 'Applications'. The 'Applications' section shows 0 items, with a 'Create application' button. It includes a 'Select Region' dropdown set to 'eu-north-1 (Current Region)', a search bar, and a table header for 'Name', 'Description', 'Region', and 'Orig'. A message at the bottom states 'The data couldn't be retrieved. Try again later.' Below the sections are links for 'View all services' and 'Go to myApplications'. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

<https://portal.aws.amazon.com/billing/signup/incomplete>

Complete sign-up

Thanks for signing up for Amazon Web Services. If we have directed you to this page, then you have not finished registering. Make sure you have done the following:

- 1 Provided all required information during sign-up. This includes adding a payment method, completing identity verification, and selecting a support plan.
- 2 Responded to any additional information we have requested by email. Check your spam and junk email folders to make sure you have not missed any such requests.
- 3 Verified your [credit card information](#). We might temporarily hold up to \$1 USD (or an equivalent amount in local currency) as a pending transaction for 3-5 days to verify your identity. This is an authorization, and you might need to contact your card issuer to approve it.

It might take up to 24 hours to fully activate your AWS services. If you can't access your services after that time, contact support.

[Complete your AWS registration](#)



[aws](#)

About AWS Contact Us Support English My Account Sign In to the Console

Amazon Q Products Solutions Pricing Documentation Learn Partner Network AWS Marketplace Customer Enablement Events Explore More Q



Congratulations!

Thank you for signing up with AWS.

We are activating your account, which should take a few minutes. You will receive an email when this is complete.

[Go to the AWS Management Console](#)

[Sign up for another account](#) or [Contact Sales](#)



After AWS S3 account set-up and uploading ecommerce-data \\, to get secret key; further steps

DataCloud@25

AWS:
adityamonish@gmail.com
DataCloud@25

Access Key Id:
AKIA54WIGEFAFJIDQVSR

Secret Access Key:
7g0V8jrl/i2dbC+n22vibOoLzZOQKAO2sIEKDj3

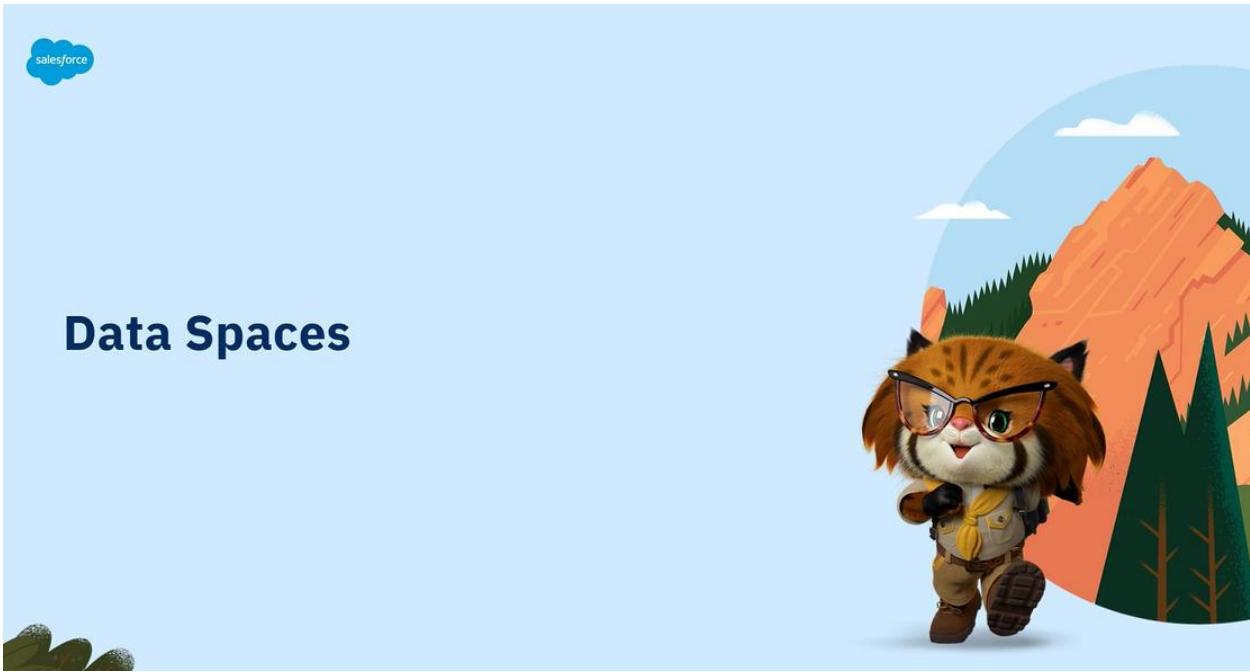
Bucket Name:
monishawsbucket

I

Prepare Your Data

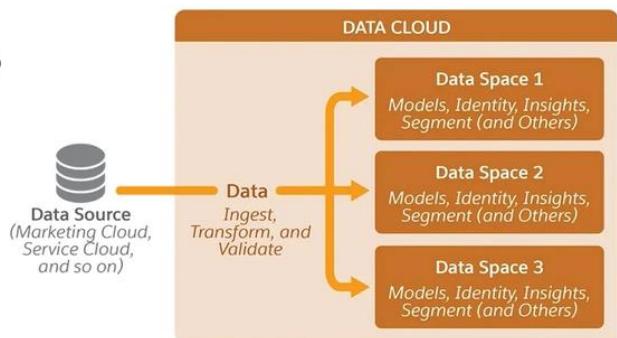


- 1. Update Connection Name as Salesforce – Home Org**
- 2. Service Cloud Bundle Package Installation**
- 3. Salesforce CRM Data – Install Learning Package**
- 4. Initialize data using Flow & Verify Data**
- 5. Create Amazon S3 account**
- 6. Upload files to S3 bucket within folder ecommerce-data**



Data Spaces

- **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**.



Requires add-on license; limit of 50 data spaces

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 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

India

USA

Data Space API Name: default
Status: ACTIVE

Data Lake Objects

Data Lake Object Name	Object Type	Filters	Data Lake Object Status
Static Currency Rates Home	Data Lake Object	No filters applied	ACTIVE

Data Space API Name: default
Status: ACTIVE

Data Lake Objects

Data Lake Object Name	Object Type	Filters	Data Lake Object Status
Static Currency Rates Home	Data Lake Object	No filters applied	ACTIVE

Munjani, Nitin
Sorry.

Aditya, Monish

So here you need to understand that the data space is going to be linked with all the data streams and you'll be able to use it for data ingestion and finally unification everything

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

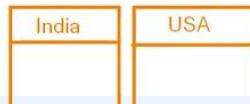
Single Data Cloud for multiple brands, regions, departments etc

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 Spaces in Data Cloud



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

When to use Data Spaces

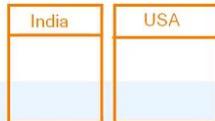
Single Data Cloud for multiple brands, regions, departments etc

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



separate.



Aditya, Monish

USA Related records because I have to do the unification at the global level, I'm going to do the unification.



Aditya, Monish

That is my main scenario if I'm going to do that if I'm going to use the UN

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

Default India region USA region

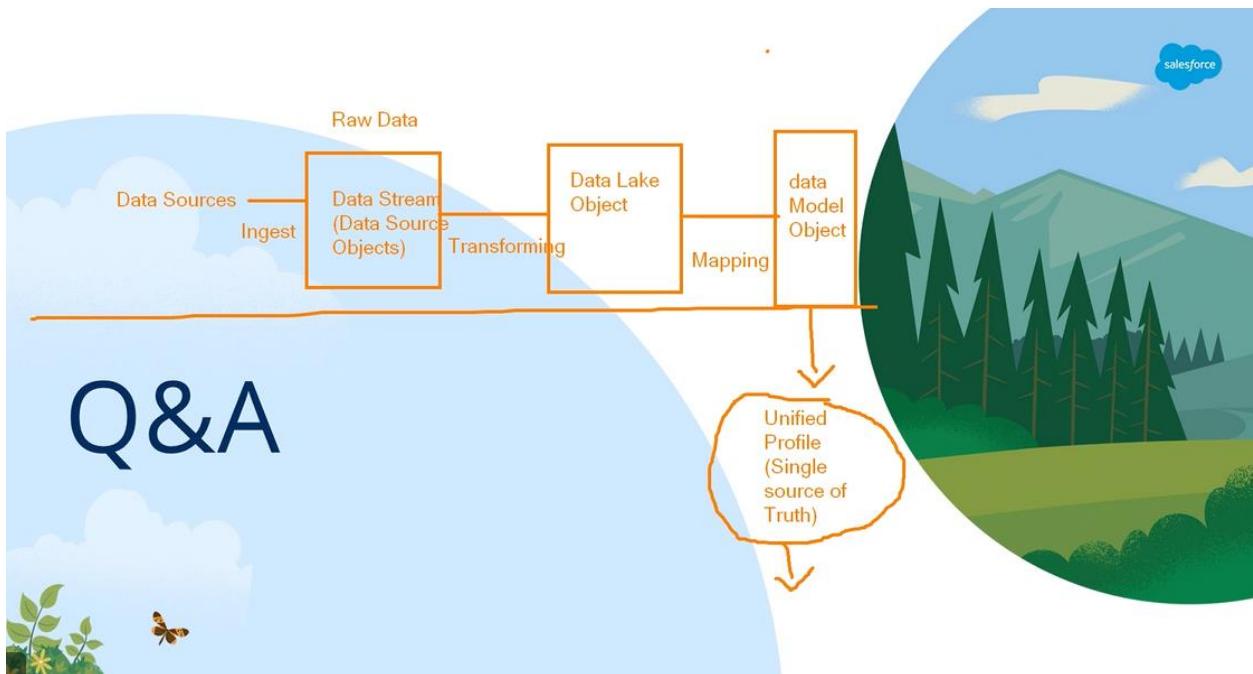
When to NOT use Data Spaces

Cross brand/region data unification is the main scenario

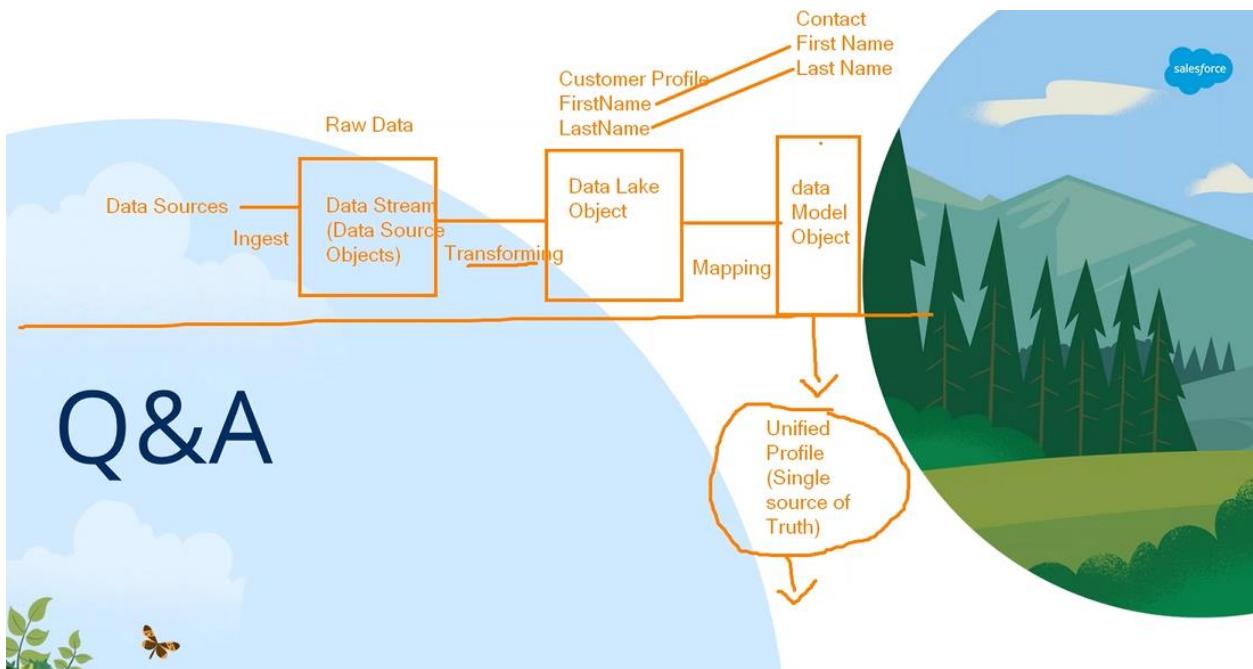
Data Spaces are NOT a Data residency solution

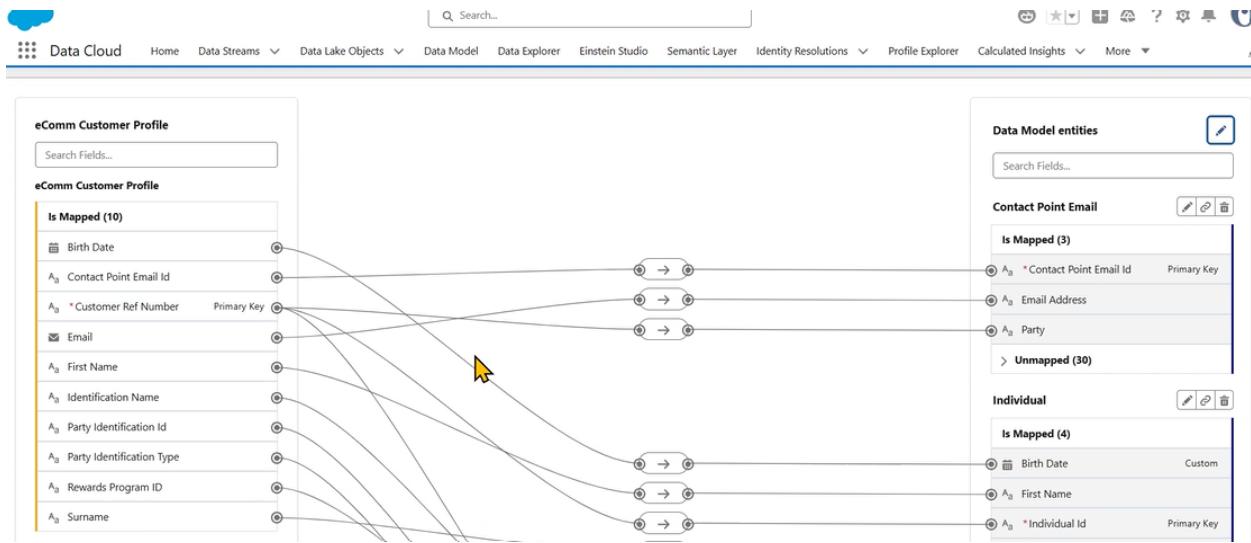
Amazon Global





Segmentation -> Activation





Data Migration is below and it's different from data mapping or DMO



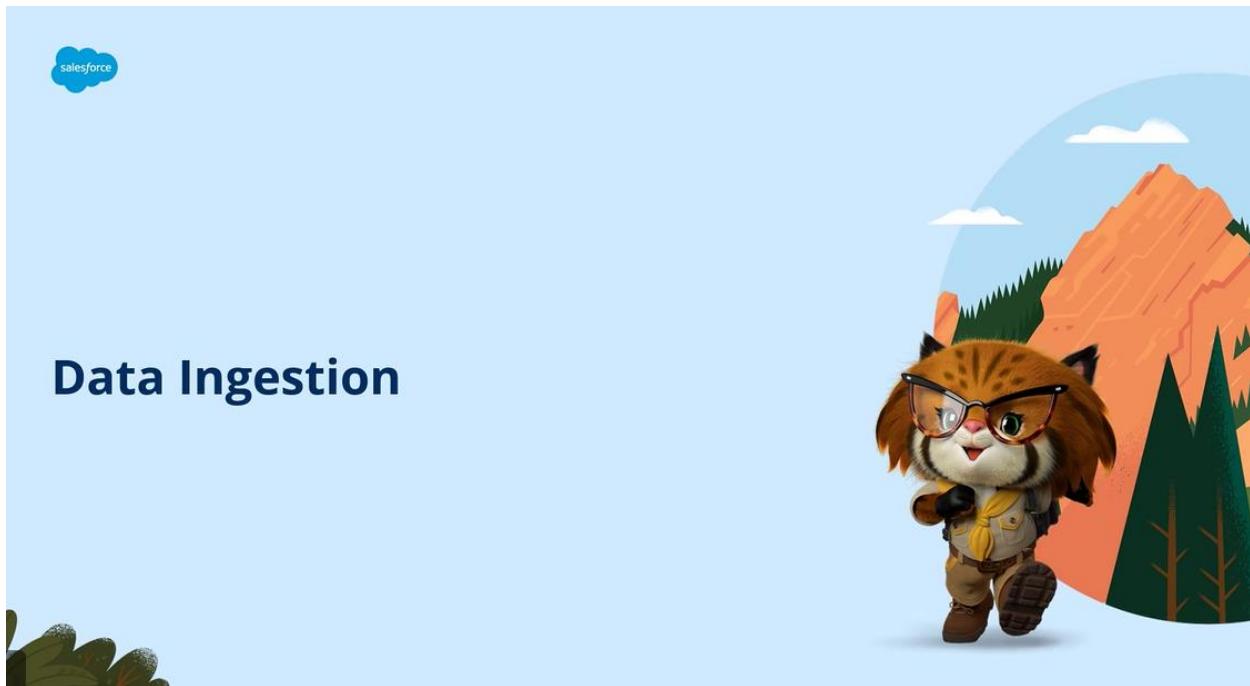
Key Data Mapping Considerations:

Data Type	Source Field (Legacy System)	Destination Field (Salesforce)	Special Notes
Customer Name	Customer_Name	Account.Name	Ensure no abbreviations are used
Order History	Order_History	Opportunity.StageHistory	Map order stages to Salesforce

4. Choose the Right Migration Tools

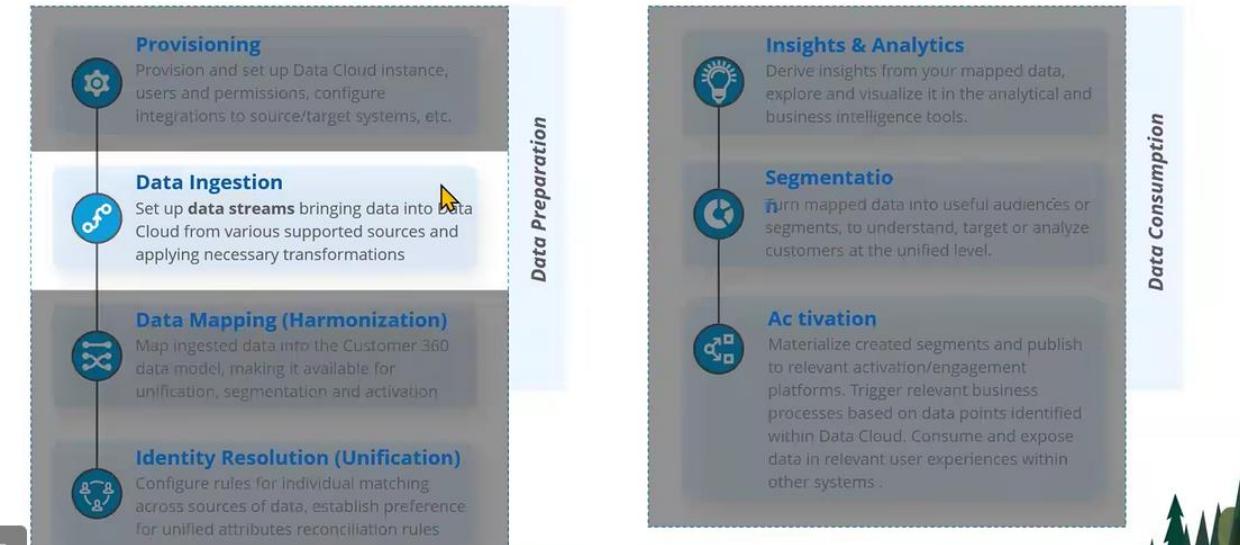
Choosing the right tools for your migration is critical. The tool you choose depends on the volume of data, the complexity of your data model, and your business needs.

Migration Tool	Ideal For	Key Features
Salesforce Data Loader	Small to medium data sets	Supports CSV imports, up to 5 million records per batch
MuleSoft	Complex data migrations involving multiple systems	API-led integration, real-time and batch data migration



The Big Picture: Implementation Themes

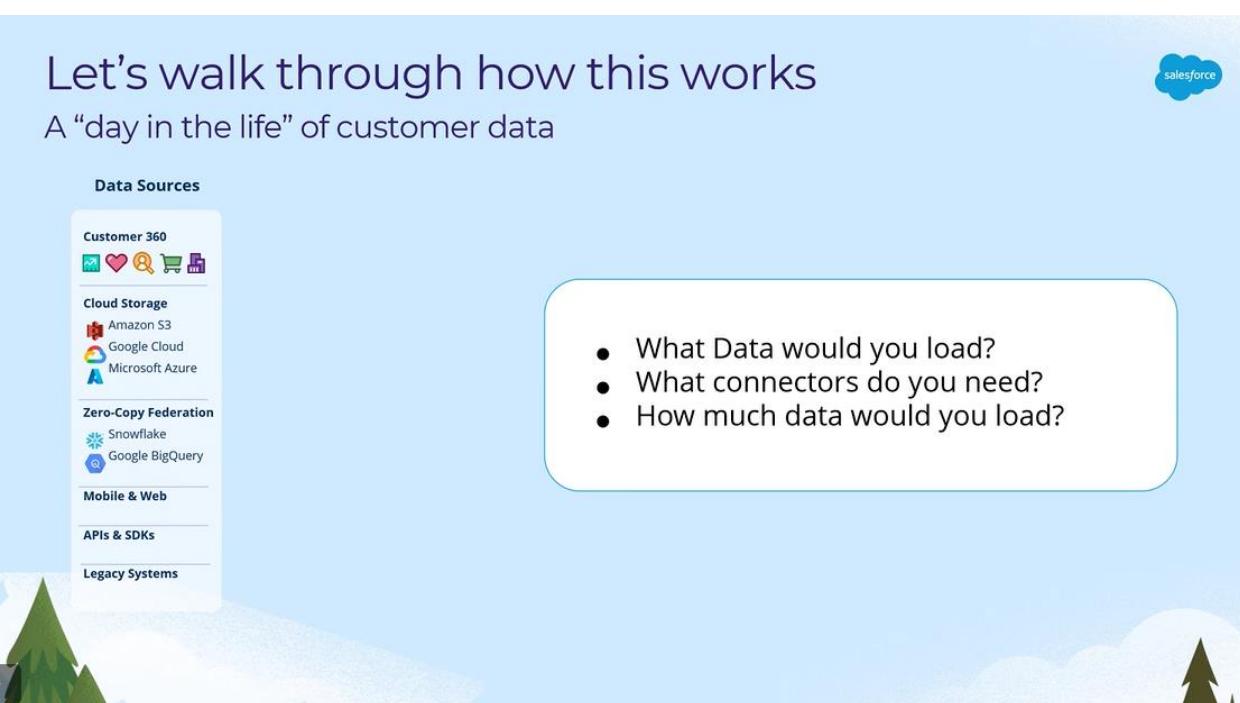
Related to the components of Data Cloud



Let's walk through how this works

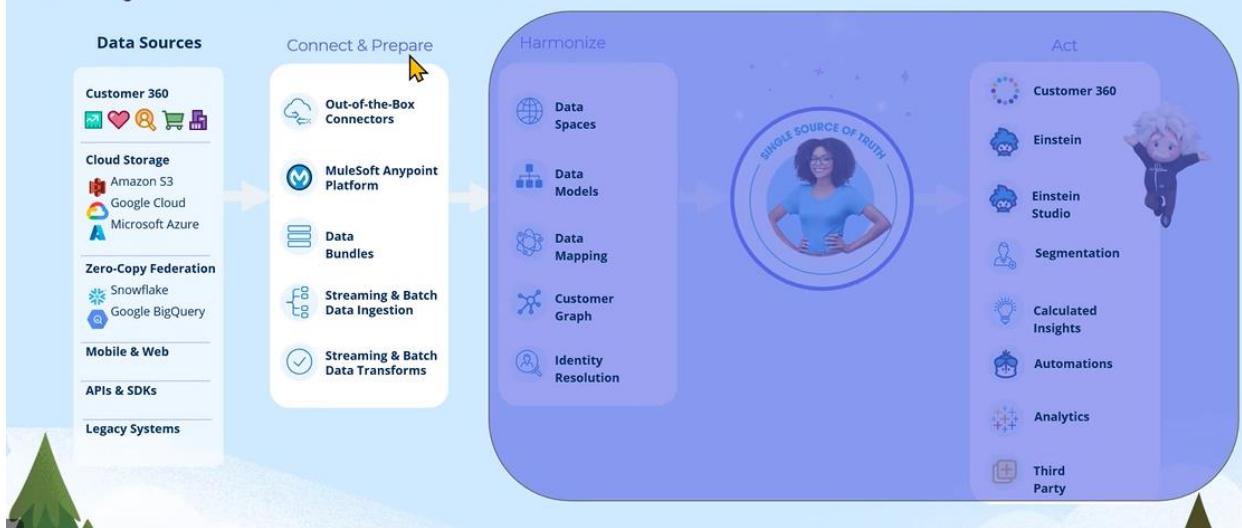


A “day in the life” of customer data



Let's walk through how this works

A “day in the life” of customer data

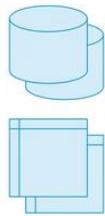


Data Ingestion Flow Overview



Data Streams:

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



Data Spaces:

Partitions of your prepared data and its utilized components

Data Source Objects (DSOs):
Original, ingested data



Formulas

Ways to perform minor adjustments at the time of ingestion

Bulk / Streaming Transformation

Ways to perform major joins / filters / transformations on DLOs

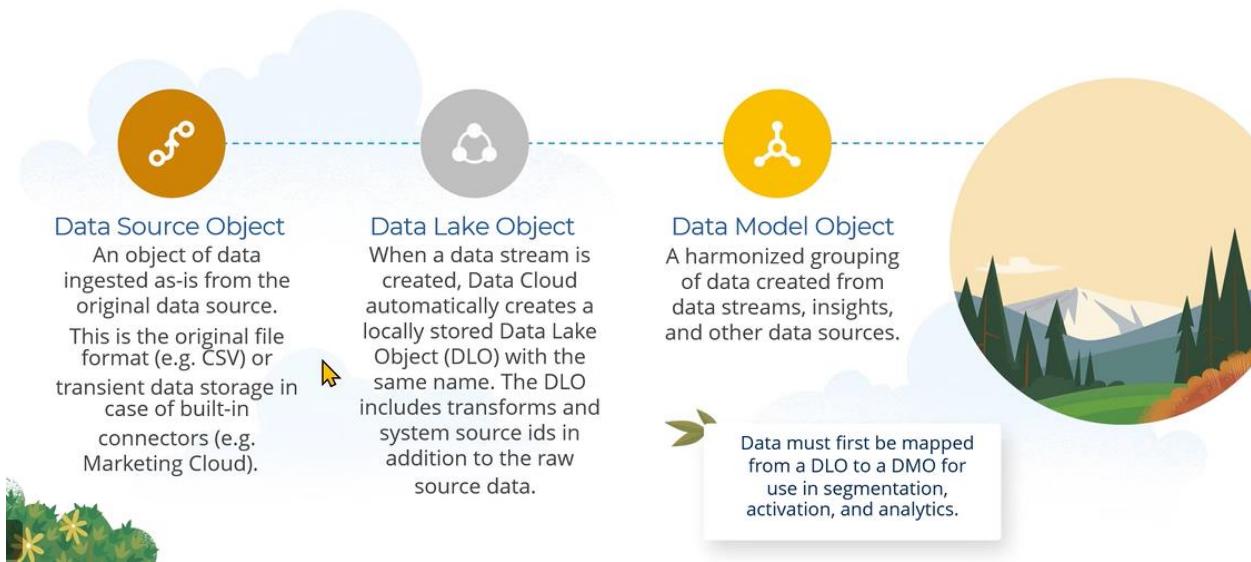
Data Lake Objects (DLOs):
Source data hydrated with transformations



Data Model Objects (DMOs):
Either materialized or views on top of the Data Lake Objects.



Data Cloud Objects



Data Streams & Sources



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
- 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
- Installed Data Kits & Pack...: Import data streams from preconfigured data kits and packages
- Mulesoft Anypoint Exchange: Access these pre-built connectors and more from Mulesoft Anypoint Exchange. Learn more ↗
- Adobe Marketo: Adobe Marketo
- Amazon Lambda: Amazon Lambda
- Amazon EC2: Amazon EC2
- Amazon RDS: Amazon RDS
- Amazon Kinesis: Amazon Kinesis
- Amazon S3: Amazon S3

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 not related to either 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

Boolean

Possible values are 'true', 'false', and blank.

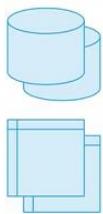
Fields with boolean data type can't be used as primary keys, record modified fields, and internal organization fields.

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

Data Ingestion Flow Overview

Data Streams:

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



Data Spaces:

Partitions of your prepared data and its utilized components



Data Source Objects (DSOs):
Original, ingested data

Formulas

Ways to perform minor adjustments at the time of ingestion



Data Lake Objects (DLOs):
Source data hydrated with transformations



Data Model Objects (DMOs):
Either materialized or views on top of the Data Lake Objects.

Bulk / Streaming Transformation

Ways to perform major joins / filters / transformations on DLOs



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.

Demo

Field Label	Field API Name	Data Type
Title	Title	Text
System Modstamp	SystemModstamp	DateTime (yy)
Salutation	Salutation	Text
Reports To ID	ReportsToID	Text
Photo URL	PhotoUrl	Text
Business Phone	BusinessPhone	Text
Owner ID	OwnerId	Text
Other Street	OtherStreet	Text
Other State/Province Code	OtherStateCode	Text

New Data Stream

Data Cloud creates a data lake object (DLO) to store data from each Salesforce object in the data stream. Select an object to configure details for its related DLO. After saving the data stream, you can't change these configurations.

Service Objects

Contact Fields (67)

Standard Fields (63) Custom Fields (4) Formula Fields (0)

Field Name	Field Label	Field API Name	Data Type
External ID	External ID	External_ID_c	Text
Languages	Languages	Languages_c	Text
Level	Level	Level_c	Text
RAVG Retail Membership Number	RAVG Loyalty ID	RAVG_Retail_Membership_Number_c	Text

Previous Next

THIS IS NOT WE ARE NOT MAKING AT THE CRM LEVEL.

Aditya, Monish
We are not making this at the CRM. We are doing it at the data cloud only for data cloud purpose.

Aditya, Monish
We are changing this field label always keep in mind

New Data Stream

The object's category impacts how you can map it to data model objects. After saving the data stream, you can't change the category. [Learn More](#)

Data Cloud creates a data lake object (DLO) to store data from each Salesforce object in the data stream. Select an object to configure details for its related DLO. After saving the data stream, you can't change these configurations.

Booking_c Details

* Data Lake Object Label: Booking_c_Home
* Data Lake Object API Name: Booking_c_Home
* Data Stream Name: Booking_c_Home

* Object Category: **Engagement** 

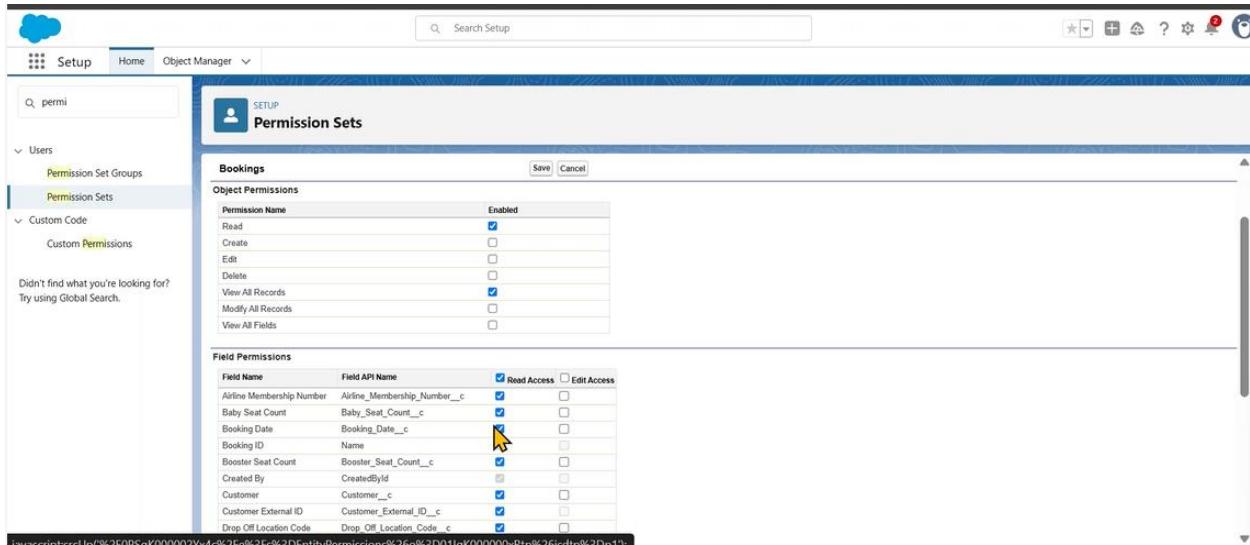
* Primary Key: Record ID

Fields selected: System Modstamp, Owner ID, Booking ID, Last Viewed Date

Required Field Name Field Label Field API Name Data Type

System Modstamp	System Modstamp	SystemModstamp	Date
Owner ID	Owner ID	OwnerId	Text
Booking ID	Booking ID	Name	Text
Last Viewed Date	Last Viewed Date	LastViewedDate	Date

Previous Next



power trusted AI.

Data Cloud Guidance



> Learn About Data Cloud

✓ Your Home Org Details

Your Data Cloud instance is live and connected to your home org.

Home Org ID

00DgL0000057CBF

[View Home Org Details](#)

Home Org Instance

CDP2-AWS-PROD8-CACENTRAL1

Tenant Endpoint

gm3w0yl0gq3wky3dmjstsmdbmq.c360a.salesforce.com

Data Spaces

1

Connections

1

✓ Set Up Data Cloud

Lay the groundwork to get started.

Go to App launcher – data cloud then Go to data stream

Welcome to Data Cloud

Secure Transform Unify More

Bring together data from all of your systems to generate unified profiles of your customers.

Get Started

Learn about Data Cloud with quick videos Data Cloud Basics

Find Data Cloud documentation About Salesforce Data Cloud

Understand usage-based pricing Data Cloud Credit Consumption: Quick Look

Quarterly Performance

CLOSED \$0 OPEN (>70%) \$0 GOAL --

As of Today 2:31 AM

Resources

- About Salesforce Data Cloud
- Data Cloud Features and Learning Path
- Get Started Using Data Cloud
- Learn About Data, Ethics, and Consent
- Data Cloud Developer Center

Assistant

Nothing needs your attention right now. Check back later.

Recap: Ingestion

Steps for Configuring Data Streams

- 1. Select Data Source**
Choose previously connected or authenticate new data source (cloud storage)
- 2. Select Data Source Object (Dataset)**
Choose starting bundle or select object or specify filename
- 3. Define Data Stream Properties**
Name source, set label, developer name and data category
- 4. Confirm Data Source Object Schema**
Verify fields and data types, set primary key
- 5. Apply Transforms Data & Space**
Optionally add formula fields to cleanse your source data or derive new fields and assign to a data space
Note: Data spaces are not currently mentioned in PLC
- 6. Configure Updates to Data Source Object**
Configure refresh mode and set the schedule

Harmonizing Details

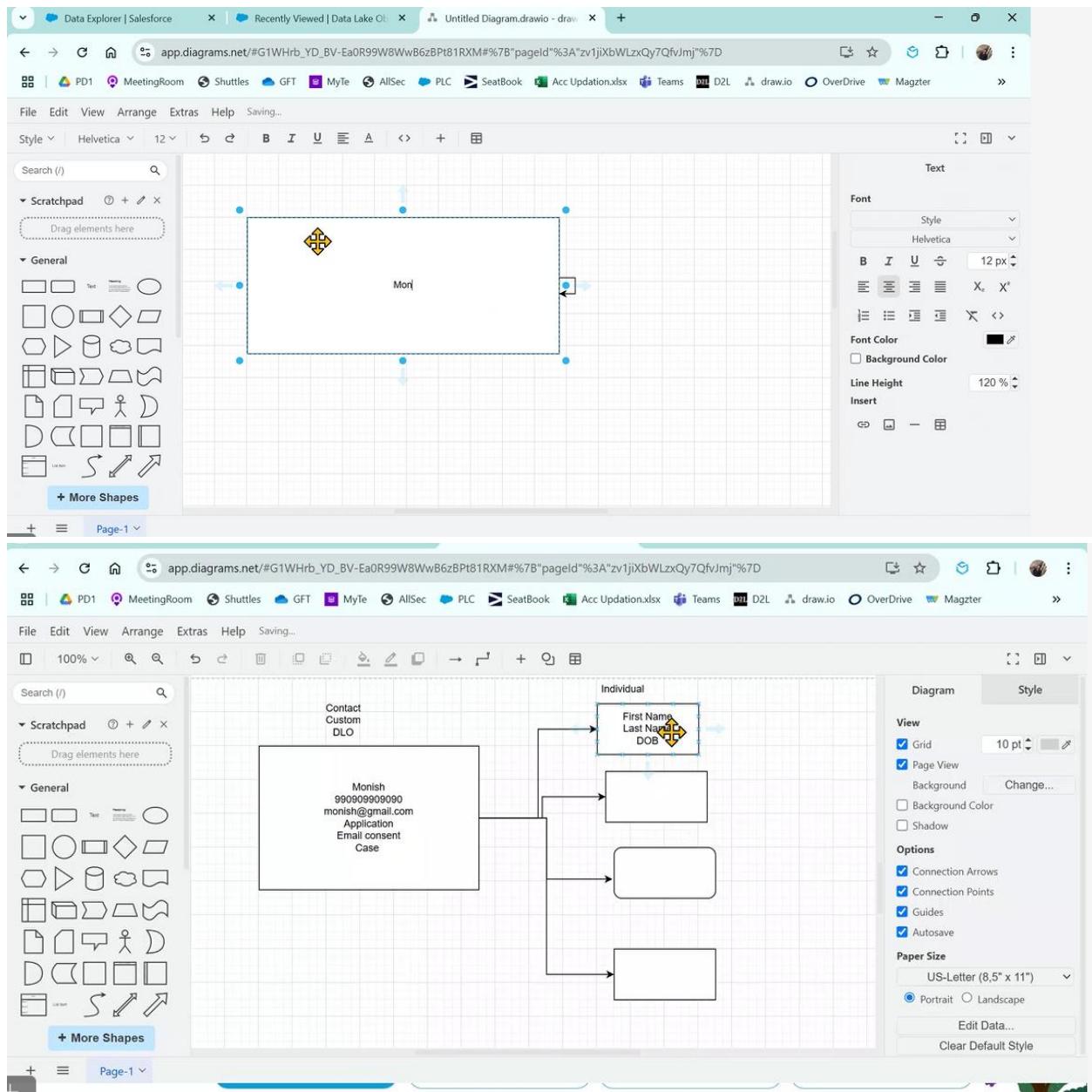
Developing a complete view of profile and engagement data across systems



Salesforce

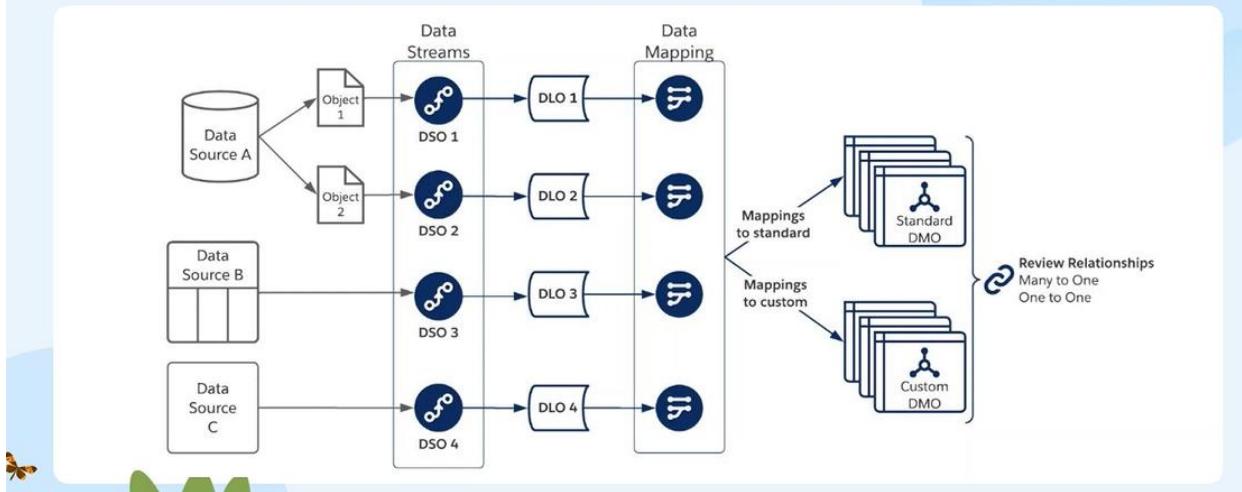
Marketing Cloud





Data Modeling

End-to-End Sequence



Two Physical Objects, One Semantic Object



Your Source: **Web Orders**

Your 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

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

SalesOrder_Id

Your Source: **Offline Sales**

Your Object: **Offline_Sales_Order_Header**



Two Physical Objects, One Semantic Object



Your Source: **Web Orders**

Your 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
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

SalesOrder. Id

Your Source: **Offline Sales**

Your Object: **Offline_Sales_Order_Header**



Required Mappings

These Objects Enable Unification and Activation Processes

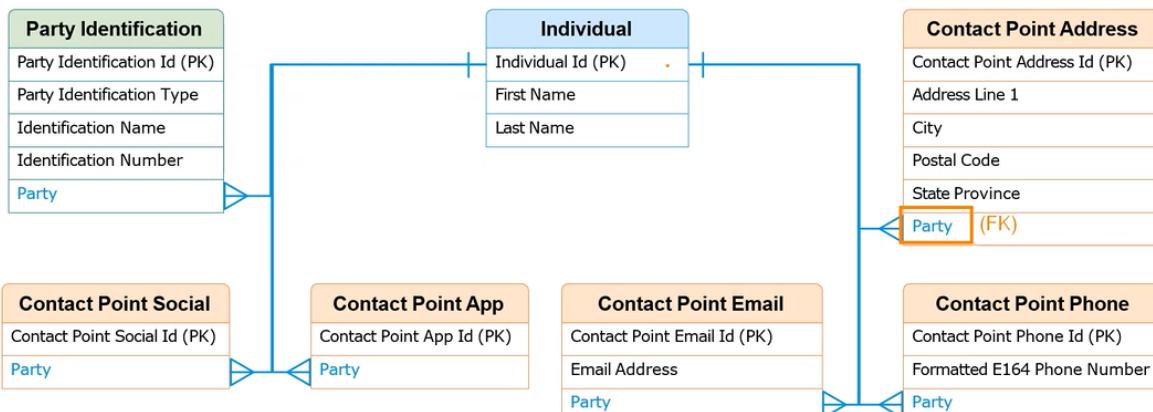


Diagram icons: Create, Edit, Delete, Search, Print, Copy, Paste



Data Transformations

Lakehouse Data progresses from bronze -> silver -> gold



Data Transformations

- Data is logically organized as 4 parts
- Data Source Objects** - the original data sources. This is the customer's original file format (e.g. CSV) or transient data storage in case of built-in connectors. (e.g. Marketing cloud)
- Data Lake Objects** - the data that is transformed and actually stored in the lake. This is generally stored as Parquet files.
- Data Spaces** - Once your data has been ingested, it is assigned to a Data Space that acts as a partition, allowing you greater control over how your data is organized
- Data Model Objects** - These are either materialized or views on top of the Data Lake Objects. These can be Customer 360 DMO or materialized ones such as Unified Individual, Computed Insights, transformations etc.



- Multi Format (Json, csv, parquet, orc)
- Multi Sourced - Cloud Storage, Mulesoft, Kafka
- Schema Preserving
- Virtual BYOL Tables
- Schema enforced
- Parquet formatted Iceberg Tables
- Hydrated by transformations
- Typed (Profile Vs Engagement)
- Materialized Tables
- Salesforce Data come direct into Lake Objects
- Semantic Mapping establishes DLO to DMO
- Can be optionally materialized
- Insights, Unified Profiles are DMOs
- Simplified Curated Data to Powers Business Applications

Screenshot of the Salesforce ApexCSIPage interface showing a query execution:

URL: orgfarm-50c38b528a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

ssot__Individual_dlm@11:47 AM [ssot__Individual_dlm@11:47 AM [Booking__c@12:11 PM]

```
ELECT Customer__c FROM Booking__c
```

Query Results - Total Rows: 8

Customer__c
X03gK000003MMQQA0
X03gK000003MPTQAO
X03gK000003MMIQA0
X03gK000003MMIQAK
X03gK000003MNEQAK
X03gK000003MNEQAO
X03gK000003MPNEQAO
X03gK000003MNSQAO

Query Grid: Save Rows | Insert Row | Delete Row | Refresh Grid | Access in Salesforce: Create New | Open Detail Page | Edit Page

Logs | Tests | Checkpoints | **Query Editor** | View State | Progress | Problems | History

```
ELECT Customer__c FROM Booking__c
```

Any query errors will appear here...

History

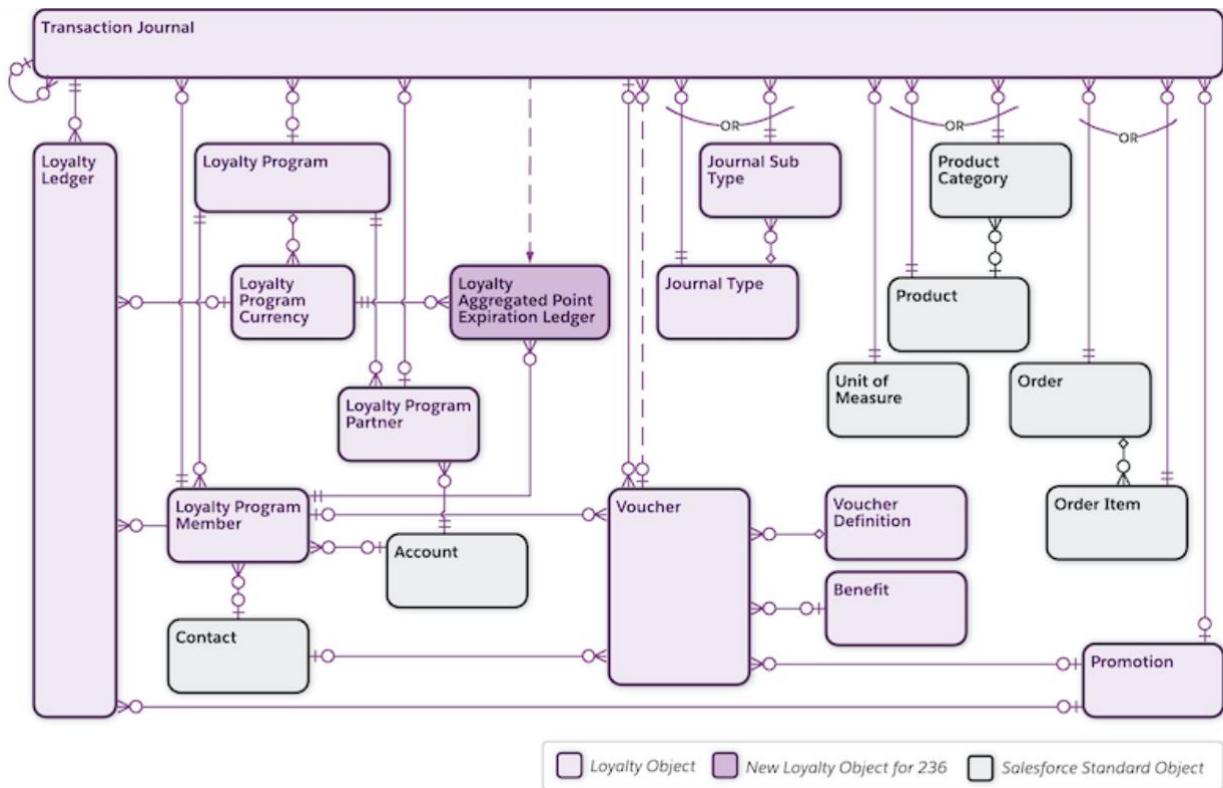
Executed

```
SELECT ssot__BirthDate__c, ssot__CreatedDate__c, ssot__D...
```

```
SELECT ssot__BirthDate__c, ssot__CreatedDate__c, ssot__D...
```

```
SELECT Customer__c FROM Booking__c
```

Execute | Use Tooling API



[Loyalty Management Data Model](#) | [Loyalty Management Developer Guide](#) | [Salesforce Developers](#)

Add New Attribute

The screenshot shows the 'Add New Attribute' dialog box over a Data Lake Objects interface. The dialog has fields for 'Field Label' (Party Individual), 'Field API Name' (Party_Individual), 'Data Type' (Number), and an unchecked 'Enable Value Suggestion' option. Buttons include 'Close', 'Save & Close', and 'Save'. Below the dialog, a table lists fields like Email Bounced Reason, Salutation, Mailing Zip/Postal Code, and Mailing City, each with a search bar to the right.

Email Bounced Reason	A _a	↔	Search data model object field
Salutation	A _a	↔	Search data model object field
Mailing Zip/Postal Code	A _a	↔	Search data model object field
Mailing City	A _a	↔	Search data model object field

The screenshot shows the 'Data Model' selection interface for 'Account Contact'. It includes a search bar, a 'Select data model object' button, and a table of fields (Email Bounced Reason, Salutation, Mailing Zip/Postal Code, Mailing City) with corresponding search bars to the right. A success message at the top states 'Successfully added new custom field: Party_Individual.'

Email Bounced Reason	A _a	↔	Search data model object field
Salutation	A _a	↔	Search data model object field
Mailing Zip/Postal Code	A _a	↔	Search data model object field
Mailing City	A _a	↔	Search data model object field

The screenshot shows the Data Cloud interface with the following details:

- Header:** Data Cloud, Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Einstein Studio, Semantic Layer, Identity Resolutions, More.
- Toolbar:** Search bar, navigation icons (star, plus, question, gear, refresh, etc.).
- Modal:** A green success message box with a checkmark icon and the text "Successfully added mappings." is displayed.
- Form Fields:** Data Space dropdown set to "default". Buttons for Close, Save & Close, and Save (circled in red).
- Section:** Contact_Home
- Data Model:** Account Contact
- Search:** Select data model object, search icon, edit, copy, delete.
- Contact_Home (62) List:**

Email Bounced Reason	A _a
Salutation	A _a
Mailing Zip/Postal Code	A _a
Mailing City	A _a
- Target Field:** New Custom Field
- Mapping Rows:** Four rows showing field pairs:

From Field	To Field
Email Bounced Reason	Search data model object field
Salutation	Search data model object field
Mailing Zip/Postal Code	Search data model object field
Mailing City	Search data model object field

The screenshot shows the Data Cloud interface with the following details:

- Header:** Data Cloud, Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Einstein Studio, Semantic Layer, Identity Resolutions, More.
- Toolbar:** Search bar, navigation icons.
- Modal:** A modal window showing view options: Table View (selected, highlighted with yellow), Visual View, Close, Save & Close, and Save (circled in red).
- Form Fields:** Data Space dropdown set to "default".
- Section:** Contact_Home
- Data Model:** Account Contact
- Search:** Select data model object, search icon, edit, copy, delete.
- Contact_Home (62) List:**

Email Bounced Reason	A _a
Salutation	A _a
Mailing Zip/Postal Code	A _a
Mailing City	A _a
- Target Field:** New Custom Field
- Mapping Rows:** Four rows showing field pairs (same as the first screenshot):

From Field	To Field
Email Bounced Reason	Search data model object field
Salutation	Search data model object field
Mailing Zip/Postal Code	Search data model object field
Mailing City	Search data model object field

TYPO

The screenshot shows the Data Cloud interface with the 'Data Model' tab selected. On the left, there's a 'Contact_Home' section with a 'Owner' field. On the right, under 'Data Model entities', there's a 'Party' section. A modal window is open, displaying the message: 'Cannot map: source and target data types should be same.' This indicates that the 'Owner' field (which is likely a string or ID type) cannot be mapped to the 'Party' entity (which is likely a more complex object type).

Correction: Check DLO data type and category then do the mapping with DMO.. If we need to create a field under DLO then go to data lakh and create a field, here in DMO you can create a field by clicking NEW.

The screenshot shows the Data Cloud interface with the 'Data Model' tab selected. On the left, there's a 'Contact_Home' section with a 'Owner' field. On the right, under 'Data Model entities', there's a 'Party' section. The 'Owner' field is now successfully mapped to the 'Party' entity, as indicated by the 'Is Mapped (2)' status in the 'Contact_Home' section. Handwritten annotations include a yellow checkmark above the 'Owner' field and green and red markings on the 'Contact_Home' section, possibly indicating specific fields or steps taken during the mapping process.

The screenshot shows the Data Cloud interface with a navigation bar at the top. On the right, there is a sidebar titled 'Add New Field' containing a list of items. One item, 'A_a Party Role', is circled in red. Below it, under 'Is Mapped (1)', is the entry 'A_a Party Individual', which is also circled in red and has a green checkmark next to it. A yellow checkmark is placed over the word 'Individual'. Other entries in the sidebar include 'Unmapped (7)', 'Add New Field', and several system-related items like 'FERPA Third-Party Disclosure' and 'Global Party'.

Created a field from data lakh

The screenshot shows the 'New Data Lake Object' creation screen. It includes fields for 'Data Lake Object Name' (containing 'SLA 2025'), 'Data Lake Object API Name' (containing 'SLA_2025'), and 'Category' (a dropdown menu with options 'Select an Option', 'Profile', 'Engagement' (highlighted with a yellow box), and 'Other'). Below these are three rows of field definitions with columns for 'Field Label', 'Field API Name', 'Data Type', 'Primary Key', and 'Record Modified Field'.

Field Label	Field API Name	Data Type	Primary Key	Record Modified Field
Data Source	DataSource	Text	<input type="checkbox"/>	<input type="checkbox"/> <input type="button"/>
Data Source Object	DataSourceObject	Text	<input type="checkbox"/>	<input type="checkbox"/> <input type="button"/>
Internal Organization	InternalOrganization	Text	<input type="checkbox"/>	<input type="checkbox"/> <input type="button"/>

[Category help line](#)

A screenshot of a software interface for creating a new Data Lake Object. The main area shows several fields defined by pairs of input boxes (e.g., 'Data Source' and 'DataSource'). A dropdown menu is open over one of these fields, listing various data types: Text, Number, DateTime, Date, Email, Phone, URL, and Percent. The 'Text' option is currently selected. A red box highlights the dropdown menu and the two input boxes it is positioned over. In the top right corner of the interface, there are standard save and cancel buttons.

Select Primary key

A screenshot of the same software interface, now showing the 'New Data Lake Object' screen. The dropdown menu has been closed, and the 'Text' type has been selected for the 'SLA 2025' field. A red checkmark is visible next to the 'Text' dropdown button, indicating it is the chosen type. The 'Save' button in the bottom right corner is highlighted with a red border.

The screenshot shows the Data Cloud interface with the following details:

- Header:** Data Cloud, Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Einstein Studio, Semantic Layer, Identity Resolutions, More.
- Notification Bar:** A green bar indicates "Data Lake Object was created." with a checkmark icon.
- Object Details:** Data Lake Object SLA 2025. Storage: Local, Category: Profile, Data Lake Object Status: Active, Last Updated On: N/A, Total Records: N/A.
- Fields Tab:** Fields, Details, Refresh History. Shows the Data Lake Object Definition with Name: SLA_2025_dll, Label: SLA 2025, Creation Type: Custom, Status: Active.
- Data Mapping:** An illustration of a sailboat on water with clouds, labeled "Data Mapping". Below it says "Data lake object not added to any data space. The data lake object has not been added to any data space yet."

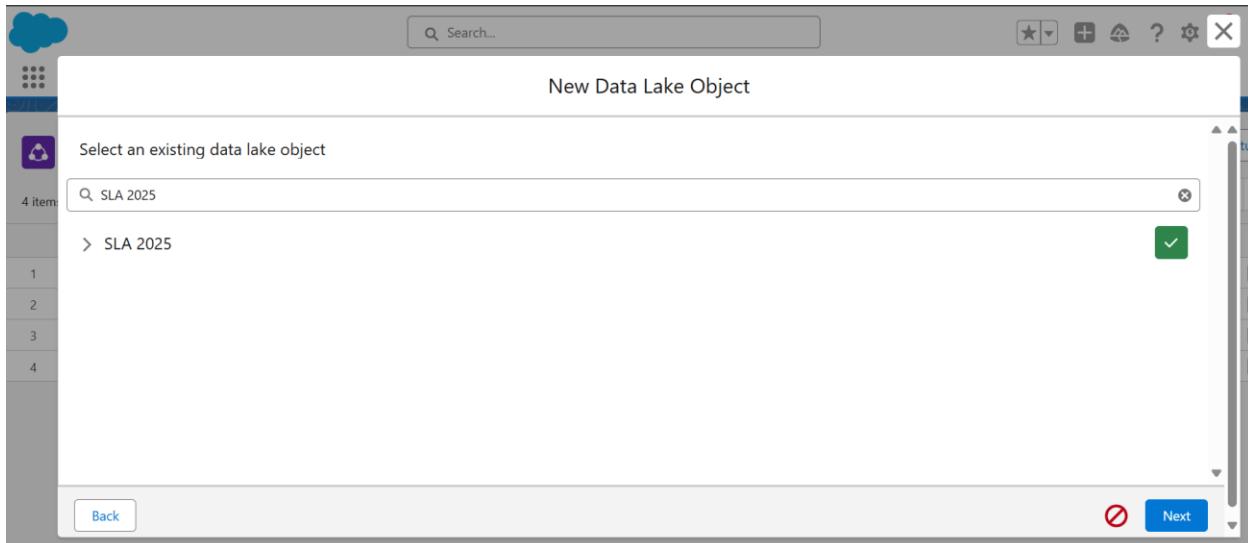
Now do mapping in DLO to DMO

The screenshot shows the Data Lake Objects list view with the following details:

- Header:** Data Lake Objects, Recently Viewed, New, Update Status.
- Search:** Search this list... with filters, sort, and search icons.
- Table:** A list of 4 items updated a few seconds ago:

	Name	Category	Billable	Storage	Data Lake O...	Last Updated On	Total Records	Total # Of F...
1	Contact_Home	Profile	Yes	Local	Active	6/17/2025, 12:35 AM	100	63
2	SLA 2025	Profile		Local	Active			6
3	Case_Home	Engagement		Local	Active	6/17/2025, 12:35 AM	5	43
4	Account_Home	Profile	Yes	Local	Active	6/17/2025, 12:35 AM	2	62

New Data lakh from existing data



Data Cloud Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer Identity Resolutions More

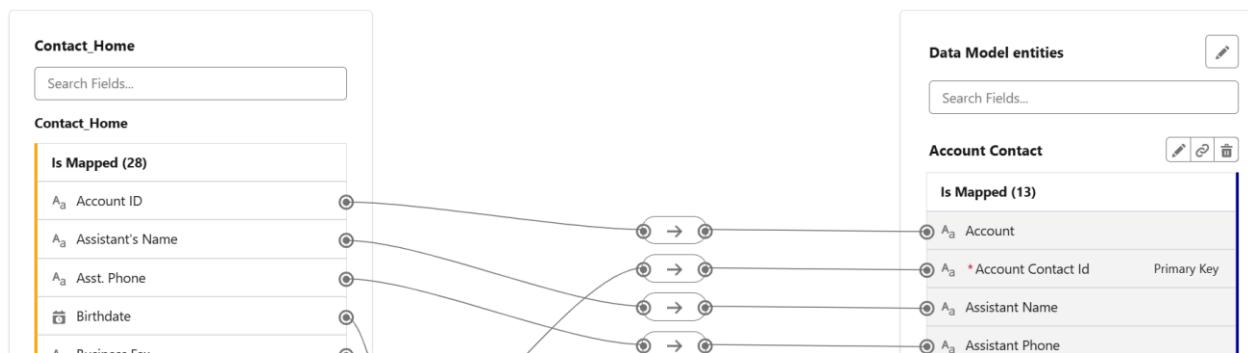
Data Lake Objects Contact_Home Mappings

Successfully added new custom field: Home_Phone.

Data Space default

Search Data Lake Objects.

Save



Contact_Home

phone

Contact_Home

In Mapped (3)

- A1_Alt Phone
- A2_Business Phone
- A3_Home Phone**
- A4_Mobile Phone
- A5_Other Phone

Data Model entities

Contact Point Phone

Account Contact

Contact Point Address

Contact Point Email

Contact Point Phone

Individual

SAVE

Data Model Objects

Mapped

8 items

	Object Label	Object API Name	Category	Data Streams	Data Lake Objects	Data Space	Type	Status
1	Account	ssot_Account_dlm	Profile	Account_Home	Account_Home	default	Standard	
2	Account Contact	ssot_AccountContact_dlm	Profile	Contact_Home	Contact_Home	default	Standard	
3	Case	ssot_Case_dlm	Engagement	Case_Home	Case_Home	default	Standard	
4	Contact Point Address	ssot_ContactPointAddress...	Other	Contact_Home, Account_Ho...	Contact_Home, Account_Ho...	default	Standard	
5	Contact Point Email	ssot_ContactPointEmail_...	Other	Contact_Home	Contact_Home	default	Standard	
6	Contact Point Phone	ssot_ContactPointPhone_...	Other	Contact_Home, Account_Ho...	Contact_Home, Account_Ho...	default	Standard	
7	Individual	ssot_Individual_dlm	Profile	Contact_Home	Contact_Home	default	Standard	
8	Static Currency Rates Home	StaticCurrencyRates_Hom...	Other	Static Currency Rates Home	Static Currency Rates Home	default	Standard	

Data Model Objects

Mapped

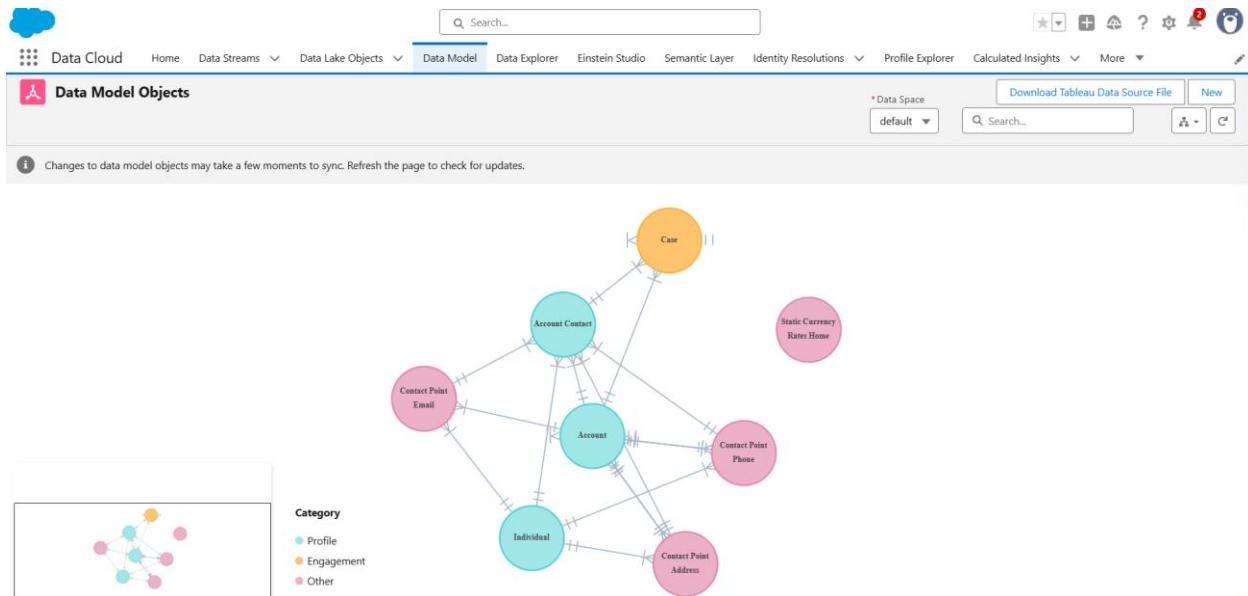
8 items

	Object Label	Object API Name	Category	Data Streams	Data Lake Objects	Data Space	Type	Status
1	Account	ssot_Account_dlm	Profile	Account_Home	Account_Home	default	Standard	
2	Account Contact	ssot_AccountContact_dlm	Profile	Contact_Home	Contact_Home	default	Standard	
3	Case	ssot_Case_dlm	Engagement	Case_Home	Case_Home	default	Standard	
4	Contact Point Address	ssot_ContactPointAddress...	Other	Contact_Home, Account_Ho...	Contact_Home, Account_Ho...	default	Standard	
5	Contact Point Email	ssot_ContactPointEmail_...	Other	Contact_Home	Contact_Home	default	Standard	
6	Contact Point Phone	ssot_ContactPointPhone_...	Other	Contact_Home, Account_Ho...	Contact_Home, Account_Ho...	default	Standard	
7	Individual	ssot_Individual_dlm	Profile	Contact_Home	Contact_Home	default	Standard	
8	Static Currency Rates Home	StaticCurrencyRates_Hom...	Other	Static Currency Rates Home	Static Currency Rates Home	default	Standard	

Display as

List

Graph



The screenshot shows the details page for the "Static Currency Rates Home" object. The top navigation bar is identical to the first screenshot. The main content area shows the following details:

- Type: Standard
- Data Space: default
- Object Status: Ready
- Mapped data streams: 0
- Mapped data lake objects: 1

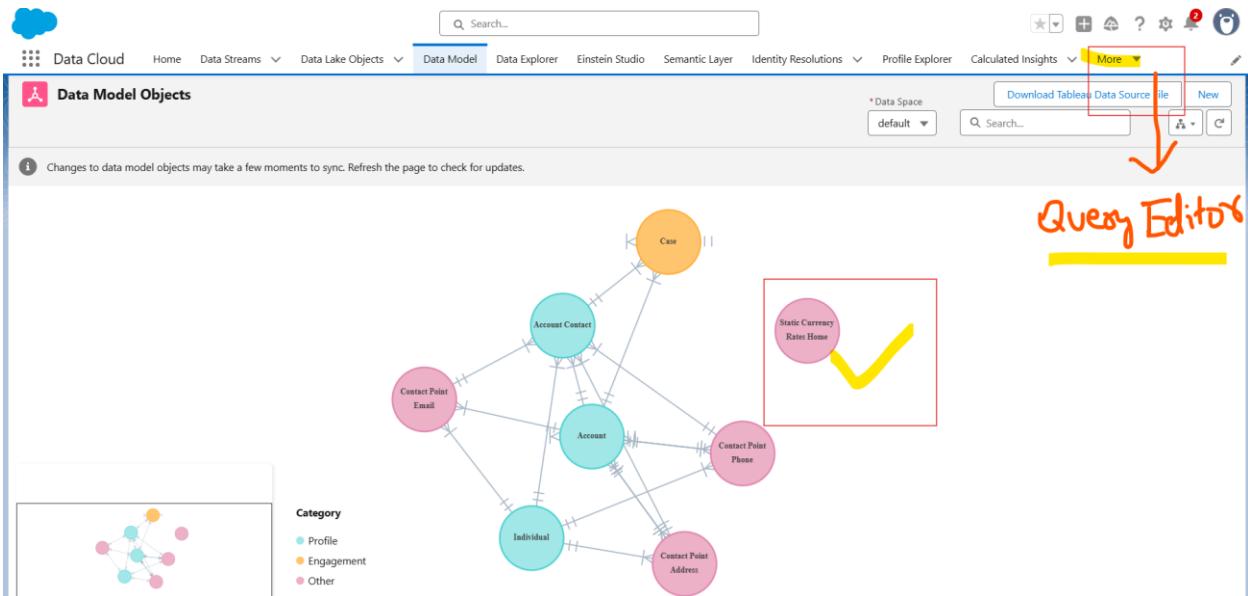
The "Details" tab is selected, showing:

- Object Label: Static Currency Rates Home
- Object API Name: StaticCurrencyRates_Home_dlm
- Category: OTHER
- Created By: Automated Process, Mon Jun 16 2025
- Mapped data streams: Static Currency Rates Home
- Object Description: (empty)

A sidebar on the right lists various actions and targets, with "Query Editor" highlighted. The URL at the bottom is <https://orgfarm-2bb037dbad-dev-ed.develop.lightning.force.com/lightning/o/DataQueryWorkspace/home>.

The screenshot shows the "Data Model Objects" page with the "Mapped" filter applied. The top navigation bar is identical to the previous screenshots. The main content area displays a table of mapped objects:

	Object Label	Object API Name	Category	Data Streams	Data Lake Objects	Data Space	Type	Status
1	Account	ssot_Account_dlm	Profile	Account_Home	Account_Home	default	Standard	Synced
2	Account Contact	ssot_AccountContact_dlm	Profile	Contact_Home	Contact_Home	default	Standard	Synced
3	Case	ssot_Case_dlm	Engagement	Case_Home	Case_Home	default	Standard	Synced
4	Contact Point Address	ssot_ContactPointAddress_dlm	Other	Contact_Home, Account_Ho...	Contact_Home, Account_Ho...	default	Standard	Synced
5	Contact Point Email	ssot_ContactPointEmail_dlm	Other	Contact_Home	Contact_Home	default	Standard	Synced
6	Contact Point Phone	ssot_ContactPointPhone_dlm	Other	Contact_Home, Account_Ho...	Contact_Home, Account_Ho...	default	Standard	Synced
7	Individual	ssot_Individual_dlm	Profile	Contact_Home	Contact_Home	default	Standard	Synced
8	Static Currency Rates Home	StaticCurrencyRates_Hom...	Other		Static Currency Rates Home	default	Standard	Synced



Static Currency Rates Home

Type: Standard | Data Space: default | Object Status: Ready | Mapped data streams: 0 | Mapped data lake objects: 1

Details

Object Label: Static Currency Rates Home
Object API Name: StaticCurrencyRates_Home_dim
Category: OTHER
Created By: Automated Process, Mon Jun 16 2025
Mapped data streams: Static Currency Rates Home
Object Description:

click

BIE

Data Model Object
Static Currency Rates Home

Type	Data Space	Object Status	Mapped data streams	Mapped data lake objects
Standard	default	Ready	0	1

Details Relationships

Object Label: Static Currency Rates Home

Object API Name: StaticCurrencyRates_Home_dlm

Category: OTHER

Created By: Automated Process, Mon Jun 16 2025

Mapped data streams:

Mapped data lake objects: Static Currency Rates Home

Object Description:

<https://orgfarm-2bb037dbad-dev-ed.develop.lightning.force.com/lightning/o/DataQueryWorkspace/home>

Data Explorer Objects

Data Space: default

Object: Data Model Object

Date and time values use your time zone settings.

Contact Point Phone Id	Data Source
View 003gL0000064D89QAE	Salesforce_Home
View 003gL0000064D8PQAU	Salesforce_Home
View 003gL0000064D8eQAE	Salesforce_Home
View 003gL0000064D8lQAE	Salesforce_Home
View 003gL0000064D8mQAE	Salesforce_Home
View 003gL0000064D8oQAE	Salesforce_Home
View 003gL0000064D9PQAU	Salesforce_Home
View 003gL0000064D8CQAU	Salesforce_Home
View 003gL0000064D92QAE	Salesforce_Home
View 003gL0000064D98QAE	Salesforce_Home
View 003gL0000064D9cQAE	Salesforce_Home
View 001gL0000095p3KQAQ	Salesforce_Home
View 001gL000009XovJQAS	Salesforce_Home
Contact	Contact
Account	Account

Copy SOQL

Copy SOQL for this Data to Your Clipboard

SOQL Query:

```
SELECT ssot__Id_c, ssot__DataSourceId_c, ssot__DataSourceObjectId_c, KQ__Id_c, KQ__PartyId_c, ssot__PartyId_c, ssot__PrimaryPhoneTypeid_c, ssot__TelephoneNumber_c FROM ssot__ContactPointPhone__dlm LIMIT 100
```

Copy

Primary Phone Type	Telephone Number
9QAE	+2999468051899
PQAU	
leQAE	
lQAE	
imQAE	
loQAE	
IPQAU	+11143191679
IQAU	
ICQAU	

Screenshot of the Data Cloud Data Explorer interface showing a list of Contact Point Phone objects.

Filter settings: Data Space (default), Object (Data Model Object), Contact Point Phone.

Table headers: Contact Point Phone Id, Key Qualifier Contact Point Ph..., Key Qualifier Party, Party, Primary Phone Type, Telephone Number.

Table data:

Contact Point Phone Id	Key Qualifier Contact Point Ph...	Key Qualifier Party	Party	Primary Phone Type	Telephone Number
View 001g000009XovJQAS			003gL0000064D8DQAU		
View 001g0000095p3KQAO			003gL0000064D8GQAU		
View 003gL0000064D8DQAU			003gL0000064D8KQAU		
View 003gL0000064D8GQAU			003gL0000064D8nQAE		
View 003gL0000064D8KQAU			003gL0000064D97QAE		
View 003gL0000064D8nQAE			003gL0000064D9LQAU		
View 003gL0000064D8GQAE			003gL0000064D9lQAE		
View 003gL0000064D97QAE			003gL0000064D92QAE		
View 003gL0000064D9LQAU			003gL0000064D99QAE		
View 003gL0000064D9lQAE			003gL0000064D92QAE	+3531605641084	
View 003gL0000064D92QAE			003gL0000064D99QAE	+867316600846	
View 003gL0000064D99QAE					

```
SELECT ssot__Id__c, KQ__Id__c, KQ__PartyId__c, ssot__PartyId__c,
ssot__PrimaryPhoneTypeId__c, ssot__TelephoneNumber__c FROM
ssot__ContactPointPhone__dlm LIMIT 100
```

Screenshot of the Data Cloud Data Explorer interface showing a list of Contact Point Phone objects. A modal window is open for copying the SOQL query.

Copy SOQL button is highlighted.

SOQL Query copied:

```
SELECT ssot__Id__c, KQ__Id__c, KQ__PartyId__c, ssot__PartyId__c, ssot__PrimaryPhoneTypeId__c, ssot__TelephoneNumber__c FROM ssot__ContactPointPhone__dlm LIMIT 100
```

The screenshot shows the Salesforce Data Explorer interface. At the top, there's a navigation bar with links like Data Cloud, Home, Data Streams, Data Lake Objects, Data Model, Data Explorer (which is selected), Einstein Studio, Semantic Layer, Identity Resolutions, Profile Explorer, Calculated Insights, and More. Below the navigation is a search bar and a toolbar with various icons. The main area is titled "Data Explorer Objects" and shows a list of "Contact Point Phone" objects. The list includes columns for Contact Point Phone Id, Key Qualifier Contact Point Ph..., Key Qualifier Party, Party, Primary Phone Type, and Telephone Number. There are 8 total columns. The data table lists multiple rows of contact point phone records, each with a checkbox and a "View" link.

Identity Resolution:

Click on Identity Resolution -> New -> Create New Ruleset -> we will go for Individual for 'Primary Data Model Object' and same to 'Match to Data Model Object' and first time 'Ruleset ID' can empty but need to mention from second n other time to identification.

Click Next

New Ruleset-Fill *Ruleset Name, Ruleset Description, check Run jobs automatically and SAVE

Ruleset saved

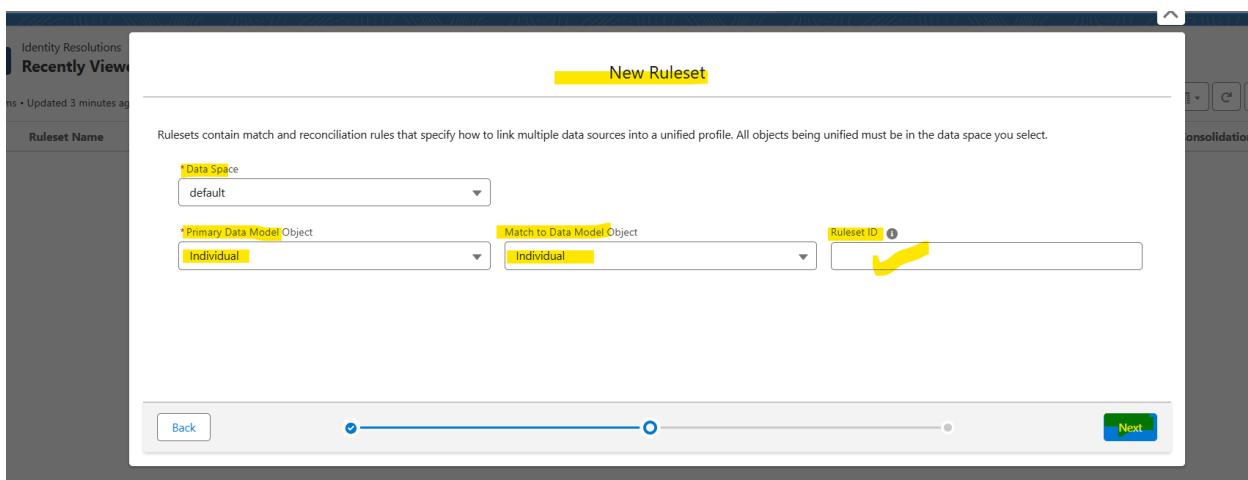
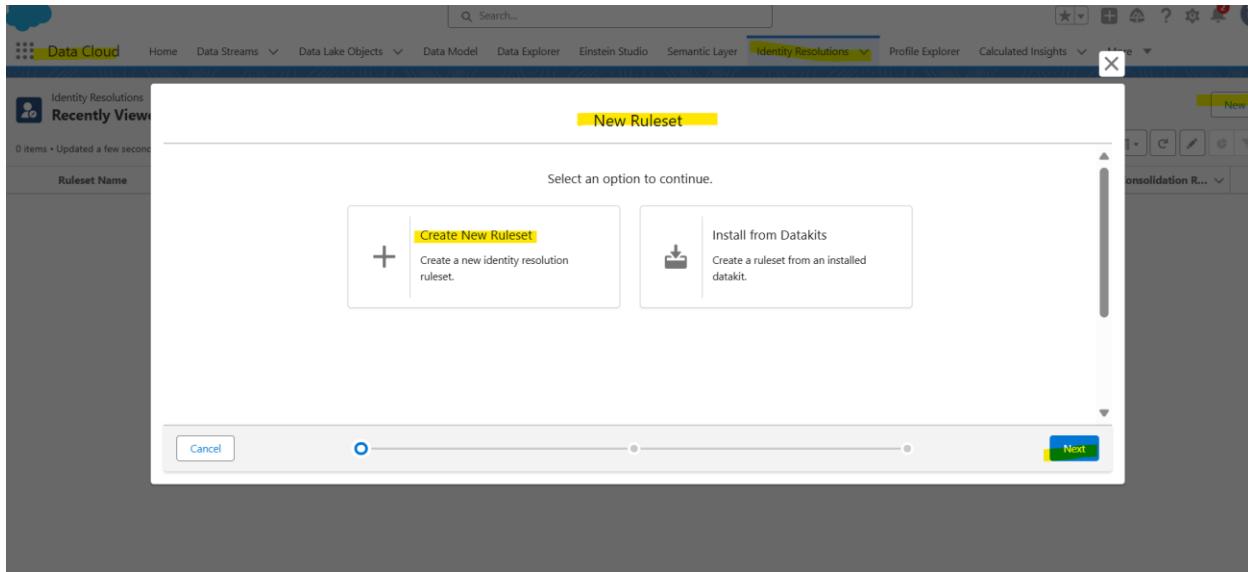
Go to main (click) -> **Configure** and Match Rule Instructions -> **Add Match Rules + Configure Match Criteria**

To check, Individual **Profiles**-> Go to **Data Explorer**:

*Data Space-default, Object:DMO & select **Individual**

RUN Ruleset

Filter and check **Total Unified Profiles**



New Ruleset

Ruleset Name: main

Ruleset Description: main ruleset with email and party identification matching rules

Run jobs automatically: Enabled

Link records with the same individual and individual FQ together using case sensitive match: Enabled

Ruleset Output Objects

Profiles created using this ruleset are stored in the following data model objects.

Data Model Object	Data Model Object API Name	Input Data Model Object
1 Unified Individual	UnifiedIndividual	Individual

Save

New Ruleset

Run jobs automatically: Enabled

Link records with the same individual and individual FQ together using case sensitive match: Enabled

Ruleset Output Objects

Profiles created using this ruleset are stored in the following data model objects.

Data Model Object	Data Model Object API Name	Input Data Model Object
1 Unified Individual	UnifiedIndividual	Individual
2 Unified Indv Contact Point Email	UnifiedContactPointEmail	Contact Point Email
3 Unified Indv Contact Point Address	UnifiedContactPointAddress	Contact Point Address
4 Unified Link Individual	IndividualIdentityLink	Individual
5 Unified Link Contact Point Email	ContactPointEmailIdentityLink	Contact Point Email
6 Unified Link Contact Point Address	ContactPointAddressIdentityLink	Contact Point Address

Save

Identity Resolution
main

Ruleset main was created.

Data Space: default Primary Data Model Object: Individual Ruleset ID: New Ruleset Status: Last Job Status: Last Job Completed:

Ruleset Properties

Match Rules

Configure your match rules to publish your ruleset.

Reconciliation Rules

Matched data sources may provide different values for a single field. Reconciliation rules specify how to select the best value to save to the unified profile. Review default rules and modify as needed. To update multiple fields, use Update Selected.

- > Contact Point Address
- > Contact Point Email
- > Individual

Resolution Summary

Total Unified Profiles: 0 / 0 Source Profiles: 0% Consolidation Rate: The amount by which source profiles were combined to produce unified profiles Known Unified Profiles: 0 Anonymous Unified Profiles: 0

Post Poll Question Share an update... Share

Cloud Data Cloud Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights More

Data Explorer Objects

Data Space: default Object: Data Model Object Total Columns: 13

Date and time values use your time zone settings.

	Birth Date	Created Date	Data Source	Data Source Obj...	First Name	Individual Id	Key Qualifier I...	Last Modified ...	Last Name	Party Individual
<input type="checkbox"/>	View 9/16/1989, 05:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Tyrone	003gL0000064D8HQAU		6/16/2025, 03:21 AM	Sylvester	
<input type="checkbox"/>	View 6/16/2025, 03:21 AM		Salesforce_Home	Contact	Virgilio	003gL0000064D8JQAU		6/16/2025, 03:21 AM	Chandler	
<input type="checkbox"/>	View 7/20/1978, 05:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Illa	003gL0000064D8pQAE		6/16/2025, 03:21 AM	Holton	
<input type="checkbox"/>	View 8/28/1968, 05:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Dorita	003gL0000064D8uQAE		6/16/2025, 03:21 AM	Valdes	
<input type="checkbox"/>	View 11/15/1960, 04:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Jourdain	003gL0000064D9NQAU		6/16/2025, 03:21 AM	Knath	
<input type="checkbox"/>	View 1/12/1990, 04:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Jocelyn	003gL0000064D88QAE		6/16/2025, 03:21 AM	Vega	
<input type="checkbox"/>	View 6/16/2025, 03:21 AM		Salesforce_Home	Contact	Alice	003gL0000064D85QAU		6/16/2025, 03:21 AM	Michael	
<input type="checkbox"/>	View 11/5/1979, 04:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Dido	003gL0000064D90QAE		6/16/2025, 03:21 AM	Saurin	
<input type="checkbox"/>	View 7/28/1980, 05:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Demetre	003gL0000064D91QAE		6/16/2025, 03:21 AM	Éanson	
<input type="checkbox"/>	View 10/6/1960, 04:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Glyn	003gL0000064D97QAU		6/16/2025, 03:21 AM	Dumingo	
<input type="checkbox"/>	View 7/11/1989, 05:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Suzie	003gL0000064D9VQAU		6/16/2025, 03:21 AM	Ingles	
<input type="checkbox"/>	View 6/7/1982, 05:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Davy	003gL0000064D9dQAE		6/16/2025, 03:21 AM	Affat	
<input type="checkbox"/>	View 7/5/1932, 04:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Azzie	003gL0000064D8AQAU		6/16/2025, 03:21 AM	Neely	
<input type="checkbox"/>	View 9/18/1951, 05:00 PM	6/16/2025, 03:21 AM	Salesforce_Home	Contact	Kip	003gL0000064D8WQAU		6/16/2025, 03:21 AM	Zimmerman	

Edit Column

Cloud Data Cloud Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights More

Data Explorer Objects

Data Space: default Object: Data Model Object Total Columns: 13

Date and time values use your time zone settings.

	Individual Id	Birth Date	First Name	Last Name	Data Source
<input type="checkbox"/>	View 003gL0000064D9CQAU	3/30/1988, 04:00 PM	Marion	Dupuis	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D9ZQAE	8/9/1973, 05:00 PM	Findley	Hakonsson	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D98QAE	5/25/1958, 05:00 PM	Adda	Scatchard	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D9cQAE	3/20/1985, 04:00 PM	Freddy	Torrijos	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D8lQAU	8/5/1957, 05:00 PM	Wallace	Harrington	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D8lQAU	7/26/1964, 05:00 PM	Ernie	Boisvert	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D9rQAE	1/3/1949, 04:00 PM	Jose	Langford	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D9fQAU	10/27/1978, 05:00 PM	Alejandrina	Elcom	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D9pQAU	2/4/1988, 04:00 PM	Rem	Byrnes	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D98QAU	2/11/1975, 04:00 PM	Lucille	Yeager	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D8bQAE	7/31/1963, 05:00 PM	Jacinda	Cho	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D98kQAE	7/26/1976, 05:00 PM	Sarita	Burnette	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D9wQAE	2/2/1983, 04:00 PM	Davine	Riddeough	Salesforce_Home
<input type="checkbox"/>	View 003gL0000064D9nQAU	7/25/1975, 05:00 PM	Pedro	Alvarez	Salesforce_Home

Cloud Data Cloud Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights More

Identity Resolutions

Recently Viewed

1 item • Updated a few seconds ago

Ruleset Name	Ruleset ID	Data Space	Primary Data Mo...	Ruleset Status	Last Job Status	Source Profiles	Matched Sourc...	Total Unified Pr...	Consolidation R...
1 main	default	Individual	New						

Data Cloud Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights More

Identity Resolution main

Data Space Primary Data Model Object Ruleset ID Ruleset Status Last Job Status Last Job Completed

Follow Update Stats Edit Run Ruleset

Ruleset Properties Details Processing History

Match Rules Configure

Configure your match rules to publish your ruleset.

Reconciliation Rules

Matched data sources may provide different values for a single field. Reconciliation rules specify how to select the best value to save to the unified profile. Review default rules and modify as needed. To update multiple fields, use Update Selected.

- > Contact Point Address
- > Contact Point Email
- > Individual

Resolution Summary Warnings (3)

Total Unified Profiles 0 / 0 Source Profiles 0% Consolidation Rate The amount by which source profiles were combined to produce unified profiles Known Unified Profiles 0 The number of unified profiles made up of at least one known source profile Anonymous Unified Profiles 0 The number of unified profiles made up of only anonymous source profiles

Post Poll Question Share an update... Share

Data Cloud Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights More

Identity Resolution main

Data Space Primary Data Model Object Ruleset ID Ruleset Status Last Job Status Last Job Completed

Ruleset Properties

Match Rules Configure your match rules.

Match Rule Instructions

How to make match rules Match rules determine how source profiles are matched together into unified profiles. Profiles match if they meet all criteria within any match rule.

Match Rule Instructions

Step 1: A criterion looks for matching values within a specific field on a data model object using the selected match method.

Select an Object	Select a Field	Select a Match Method	Optional: Advanced Settings
Selected Object	Selected Field	Selected Match Method	Configure
Match criteria can be created only on certain fields in Individual, Account, or Lead objects.			
Values in this field on the object are compared using the match method.			
The match method determines how data is processed in preparation for matching. Not all methods are available for all types of data.			

Step 2: Click + Add Criteria to create additional match criteria for your match rule, then save your match rule. To expand data matching opportunities, add more match rules.

Cancel Next

Known Unified Profiles 0 / 0 Source Profiles 0% Consolidation Rate The amount by which source profiles were combined to produce unified profiles Known Unified Profiles 0 The number of unified profiles made up of at least one known source profile Anonymous Unified Profiles 0 The number of unified profiles made up of only anonymous source profiles

Post Poll Question Share an update... Share

Next

Add Match Rules

Match Rules

Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rule 1	Configure
OR	
Add Match Rule	

Frequently Asked Questions

- How many match rules should I create?**
Records can be declared a match using any one rule in your ruleset. Each match rule is a new opportunity for records to match.
- How many match criteria should I create for each rule?**
All criteria within a match rule must be met for any two records to be matched. Every time you add criteria, you raise the number of unique profiles made up of anonymous source profiles.

Click Add Match Rule:

Add Match Rules

Match Rules

Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rule Name	Fields Mapped and Match Rule Available
<input type="radio"/> Fuzzy Name and Normalized Email	✓
<input type="radio"/> Fuzzy Name and Normalized Phone	⚠
<input type="radio"/> Fuzzy Name and Normalized Address	✓
<input type="radio"/> Fuzzy Name and Normalized Phone and Normalized Email	⚠
<input type="radio"/> Custom Rule	✓

Frequently Asked Questions

- What are default match rules?**
Default match rules allow you to quickly select one of the common match rule configurations. The number and configuration of available default rules vary depending on the primary data model object you selected. [Tell Me More](#)
- How many match criteria should I create for each rule?**
All criteria within a match rule must be met for any two records to be matched.

Add Match Rules

Match Rules

Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rule Name	Fields Mapped and Match Rule Available
<input checked="" type="radio"/> Fuzzy Name and Normalized Email	✓
<input type="radio"/> Fuzzy Name and Normalized Phone	⚠
<input type="radio"/> Fuzzy Name and Normalized Address	✓
<input type="radio"/> Fuzzy Name and Normalized Phone and Normalized Email	⚠
<input type="radio"/> Custom Rule	✓

Frequently Asked Questions

- What are default match rules?**
Default match rules allow you to quickly select one of the common match rule configurations. The number and configuration of available default rules vary depending on the primary data model object you selected. [Tell Me More](#)
- How many match criteria should I create for each rule?**
All criteria within a match rule must be met for any two records to be matched.

Configure Match Criteria

Configure Match Criteria

Configure at least one match criterion. Values in the specified fields will be compared for matches.

* Match Rule Name
Fuzzy Name and Normalized Email

Data Model Object	Field	Match Method	Advanced Settings
Individual	First Name	Fuzzy - Medium Precision	Configure
Individual	Last Name	Exact	Configure
Contact Point Email	Email Address	Fuzzy - Low Precision	Configure
		✓ Fuzzy - Medium Precision	+ Add Criteria
		Fuzzy - High Precision	

Back Next

Add Match Rules

Match Rules

Select a default match rule to add to the ruleset, or configure a custom rule.

Fuzzy Name and Normalized Email

Add Match Rule

Back Save

Frequently Asked Questions

How many match rules should I create?

Records can be declared a match using any one rule in your ruleset. Each match rule is a new opportunity for records to match.

How many match criteria should I create for each rule?

All criteria within a match rule must be met for any two records to be matched. Every time you add criteria, you raise the

Add Match Rules

Add Match Rules
Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rules

Match Rule Name	Fields Mapped and Match Rule Available
<input type="radio"/> Fuzzy Name and Normalized Email	✓
<input type="radio"/> Fuzzy Name and Normalized Phone	⚠
<input type="radio"/> Fuzzy Name and Normalized Address	✓
<input type="radio"/> Fuzzy Name and Normalized Phone and Normalized Email	⚠
<input type="radio"/> Custom Rule	✓

[Back](#) [Next](#)

Frequently Asked Questions

What are default match rules?
Default match rules allow you to quickly select one of the common match rule configurations. The number and configuration of available default rules vary depending on the primary data model object you selected. [Tell Me More](#)

How many match criteria should I create for each rule?
All criteria within a match rule must be met for any two records to be matched.

Add Match Rules

Add Match Rules
Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rules

Match Rule Name	Fields Mapped and Match Rule Available
<input type="radio"/> Fuzzy Name and Normalized Email	✓
<input checked="" type="radio"/> Fuzzy Name and Normalized Phone	⚠
<input type="radio"/> Fuzzy Name and Normalized Address	✓
<input type="radio"/> Fuzzy Name and Normalized Phone and Normalized Email	⚠
<input type="radio"/> Custom Rule	✓

 We hit a snag. 

Select an active match rule. 

[Back](#) [Next](#)

Frequently Asked Questions

What are default match rules?
Default match rules allow you to quickly select one of the common match rule configurations. The number and configuration of available default rules vary depending on the primary data model object you selected. [Tell Me More](#)

Add Match Rules

Add Match Rules
Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rules

Match Rule Name	Fields Mapped and Match Rule Available
<input type="radio"/> Fuzzy Name and Normalized Email	✓
<input type="radio"/> Fuzzy Name and Normalized Phone	⚠
<input checked="" type="radio"/> Fuzzy Name and Normalized Address	✓
<input type="radio"/> Fuzzy Name and Normalized Phone and Normalized Email	⚠
<input type="radio"/> Custom Rule	✓

[Back](#) [Next](#)

Frequently Asked Questions

What are default match rules?
Default match rules allow you to quickly select one of the common match rule configurations. The number and configuration of available default rules vary depending on the primary data model object you selected. [Tell Me More](#)

How many match criteria should I create for each rule?
All criteria within a match rule must be met for any two records to be matched.

Configure Match Criteria

Fuzzy Name and Normalized Address an

Data Model Object	Field	Match Method	Advanced Settings
Individual	First Name	Fuzzy - Medium Precision	Configure Delete
Individual	Last Name	Exact	Configure Delete
Contact Point Address	Address Line 1	Exact Normalized	Configure Delete
Contact Point Address	City	Exact	Configure Delete
Contact Point Address	Country	Exact Normalized	Configure Delete

+ Add Criteria

[Back](#) [Next](#)

Configure Match Criteria

Individual	First Name	Fuzzy - Medium Precision	Configure Delete
Individual	Last Name	Exact	Configure Delete
Contact Point Address	Address Line 1	Exact Normalized	Configure Delete
Contact Point Address	City	Exact	Configure Delete
Contact Point Address	Country	Exact Normalized	Configure Delete
Select Object	Select Attribute	Select Match Method	Configure Delete
Contact Point Address			+ Add Criteria
Contact Point Email			
Individual			

[Back](#) [Next](#)

Configure Match Criteria

ail

Data Model Object	Field	Match Method	Advanced Settings
Individual	First Name	Fuzzy - Medium Precision	Configure Delete
Individual	Last Name	Exact	Configure Delete
Contact Point Address	Address Line 1	Exact Normalized	Configure Delete
Contact Point Address	City	Exact	Configure Delete
Contact Point Address	Country	Exact Normalized	Configure Delete
Individual	Birth Date	Exact	Configure Delete

+ Add Criteria

[Back](#) [Next](#)

Add Match Rules

Match Rules
Select a default match rule to add to the ruleset, or configure a custom rule.

Fuzzy Name and Normalized Email

Fuzzy Name and Normalized Address and DoB

Add Match Rule

OR

Back **Save**

Frequently Asked Questions

How many match rules should I create?
Records can be declared a match using any one rule in your ruleset. Each match rule is a new opportunity for records to match.

How many match criteria should I create for each rule?
All criteria within a match rule must be met for any two records to be matched. Every time you add criteria...you raise the

Add Match Rules

Add Match Rules
Select a default match rule to add to the ruleset, or configure a custom rule.

Match Rules

Match Rule Name	Fields Mapped and Match Rule Available
<input type="radio"/> Fuzzy Name and Normalized Email	✓
<input type="radio"/> Fuzzy Name and Normalized Phone	⚠
<input type="radio"/> Fuzzy Name and Normalized Address	✓
<input type="radio"/> Fuzzy Name and Normalized Phone and Normalized Email	⚠
<input checked="" type="radio"/> Custom Rule	✓

Back **Next**

Frequently Asked Questions

What are default match rules?
Default match rules allow you to quickly select one of the common match rule configurations. The number and configuration of available default rules vary depending on the primary data model object you selected. [Tell Me More](#)

How many match criteria should I create for each rule?
All criteria within a match rule must be met for any two records to be matched.

Configure Match Criteria

Configure at least one match criterion. Values in the specified fields will be compared for matches.

* Match Rule Name

Match Criteria

Data Model Object	Field	Match Method	Advanced Settings
Contact Point Email	Email Address	Exact Normalized	Configure Delete

Back **Next**

Configure Match Criteria

Configure at least one match criterion. Values in the specified fields will be compared for matches.

* Match Rule Name
Custom Rule

Match Criteria

Data Model Object	Field	Match Method	Advanced Settings
Contact Point Email	Email Address	Exact Normalized	Configure Delete
Individual	Birth Date	Exact	Configure Delete
Contact Point Address	City	Exact	Configure Delete

[+ Add Criteria](#)

[Cancel](#) [Next](#)

Configure Match Criteria

* Match Rule Name
Exact name and DOB

Match Criteria

Data Model Object	Field	Match Method	Advanced Settings
Individual	First Name	Exact	Configure Delete
Individual	Last Name	Exact	Configure Delete
Individual	Birth Date	Exact	Configure Delete
Contact Point Email	Email Address	Exact Normalized	Configure Delete

[+ Add Criteria](#)

[Back](#) [Next](#)

Add Match Rules

Match Rules
Select a default match rule to add to the ruleset, or configure a custom rule.

Fuzzy Name and Normalized Email [OR](#)

Fuzzy Name and Normalized Address and DoB [OR](#)

Exact name and DOB

[Add Match Rule](#)

[Back](#) [Save](#)

Frequently Asked Questions

How many match rules should I create?
Records can be declared a match using any one rule in your ruleset. Each match rule is a new opportunity for records to match.

How many match criteria should I create for each rule?
All criteria within a match rule must be met for any two records to be matched. Every time you add criteria, you raise the

Identity Resolution main

Match Rules

Fuzzy Name and Normalized Email OR Fuzzy Name and Normalized Address and DoB OR Custom Rule

Reconciliation Rules

Matched data sources may provide different values for a single field. Reconciliation rules specify how to select the best value to save to the unified profile. Review default rules and modify as needed. To update multiple fields, use Update Selected.

- > Contact Point Address
- > Contact Point Email
- > Individual

Total Unified Profiles 0 / 0 Source Profiles

Consolidation Rate 0%
The amount by which source profiles were combined to produce unified profiles

Known Unified Profiles 0
The number of unified profiles made up of at least one known source profile

Anonymous Unified Profiles 0
The number of unified profiles made up of only anonymous source profiles

Post Poll Question

Share an update... Share

Search this feed... Search

Data Cloud

Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer **Identity Resolutions** Profile Explorer Calculated Insights More

Identity Resolution main

Data Space Primary Data Model Object Ruleset ID Ruleset Status Last Job Status Last Job Completed

Data Space default Primary Data Model Object Individual Ruleset ID Published Last Job Status In Progress Last Job Completed

Ruleset Properties Details Processing History

Match Rules

Fuzzy Name and Normalized Email OR Fuzzy Name and Normalized Address and DoB OR Custom Rule

Reconciliation Rules

Matched data sources may provide different values for a single field. Reconciliation rules specify how to select the best value to save to the unified profile. Review default rules and modify as needed. To update multiple fields, use Update Selected.

- > Contact Point Address
- > Contact Point Email
- > Individual

Resolution Summary Warnings (4)

Total Unified Profiles 0 / 0 Source Profiles

Consolidation Rate 0%
The amount by which source profiles were combined to produce unified profiles

Known Unified Profiles 0
The number of unified profiles made up of at least one known source profile

Anonymous Unified Profiles 0
The number of unified profiles made up of only anonymous source profiles

Post Poll Question

Configure Match Criteria

Configure at least one match criterion. Values in the specified fields will be compared for matches.

* Match Rule Name
Exact Name & DOB

Match Criteria

Data Model Object	Field	Match Method	Advanced Settings
Select Object	Select Attribute	Select Match Method	Configure
Contact Point Address			+ Add Criteria
Contact Point Email			
Contact Point Phone			
Individual			
Party Identification			

Back Next

Now,

The screenshot shows the Data Cloud Identity Resolution main interface. At the top, there's a navigation bar with links like Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Einstein Studio, Semantic Layer, Identity Resolutions, Profile Explorer, Calculated Insights, More, and a search bar. Below the navigation is a card for the 'main' ruleset, showing details such as Data Space (default), Primary Data Model Object (Individual), Ruleset ID, Published Status, Last Job Status (In Progress), and Last Job Completed (6/17/2025, 6:03 AM). The main content area has tabs for Ruleset Properties, Details, and Processing History. Under Ruleset Properties, there's a section for Match Rules with three options: Fuzzy Name and Normalized Email, Fuzzy Name and Normalized Address and DoB, and Exact name and DOB. There's also a Reconciliation Rules section with a note about selecting the best value for unified profiles. On the right side, there's a Resolution Summary panel with metrics like Total Unified Profiles (100 / 100 Source Profiles), Consolidation Rate (0%), Known Unified Profiles (100), and Anonymous Unified Profiles (0). A 'Run Ruleset' button is visible at the bottom right of the summary panel.

EDIT Reconciliation rule:

This screenshot is similar to the previous one but with several UI elements highlighted with red circles and boxes for editing. The Match Rules section and its 'Edit' button, the Run Ruleset button in the top right, and the 'Edit' button in the Resolution Summary panel are all circled in red. The rest of the interface is identical to the first screenshot, showing the ruleset properties, reconciliation rules, and resolution summary.

Data Cloud Home Data Streams Data Lake Objects Data Model Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights More

Identity Resolution main Your ruleset job won't run because there weren't any changes to data streams, source data model objects, or the ruleset's configuration.

Data Space Primary Data Model Object Ruleset ID Ruleset Status Last Job Status Last Job Completed
default Individual Published Succeeded 6/17/2025, 6:14 AM

Ruleset Properties Details Processing History

Match Rules

Fuzzy Name and Normalized Email OR Fuzzy Name and Normalized Address and DoB OR Exact name and DOB

Reconciliation Rules

Matched data sources may provide different values for a single field. Reconciliation rules specify how to select the best value to save to the unified profile. Review default rules and modify as needed. To update multiple fields, use Update Selected.

> Contact Point Address
> Contact Point Email

Resolution Summary Warnings (3)

Total Unified Profiles 100 / 100 Source Profiles

Consolidation Rate 0%
The amount by which source profiles were combined to produce unified profiles

Known Unified Profiles 100
The number of unified profiles made up of at least one known source profile

Anonymous Unified Profiles 0
The number of unified profiles made up of only anonymous source profiles

Runruleset and update status:

Your ruleset job is running. Check back later for results.

Data Space Primary Data Model Object Ruleset ID Ruleset Status Last Job Status Last Job Completed
default Account 1 Published In Progress 6/17/2025, 6:33 AM

Ruleset Properties Details Processing History

Match Rules

⚠ Account Contact ID Rule OR Exact Business Name and Normalized Address

Reconciliation Rules

Match rule warnings (1): To improve unified profiles, add more match rule criteria. Edit Match Rules

Data mapping warnings (2): Map all required fields to create your unified profiles. Review these data lake objects.
Contact_Home
Account_Home

Your ruleset job is running. Check back later for results.

Data Space Primary Data Model Object Ruleset ID Ruleset Status Last Job Status Last Job Completed
default Account 1 Published In Progress 6/17/2025, 6:33 AM

Ruleset Properties Details Processing History

Match Rules

⚠ Account Contact ID Rule OR Exact Business Name and Normalized Address

Reconciliation Rules

Match rule warnings (1): To improve unified profiles, add more match rule criteria. Edit Match Rules

Data mapping warnings (2): Map all required fields to create your unified profiles. Review these data lake objects.
Contact_Home
Account_Home