Marketing Cloud Customer Data Platform: Admin Implementation Guide

Salesforce, Summer '22

@salesforcedocs

Last updated: July 21, 2022

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SALESFORCE CDP IMPLEMENTATION

Follow the implementation steps to configure your Salesforce CDP instance.

Who This Guide Is For

This guide is for admins to implement and configure Salesforce CDP.

Document Goals

The goal of this implementation guide is to explain the steps to set up a Salesforce CDP org using an example use case from Northern Trail Outfitters (NTO).

Note: PDF guides are updated regularly, so check the date of any downloaded and saved guides before beginning your implementation.

Overview of Salesforce CDP Implementation Steps
To set up a new Salesforce CDP org, there are several implementation steps to complete.

Customer Data Platform Use Case
Northern Trail Outfitters (NTO) is eager to use Marketing Cloud Customer Data Platform to help build more personalized marketing campaigns based on data from multiple sources.

Configure
Let's review the implementation steps admin completes to configure Salesforce CDP.

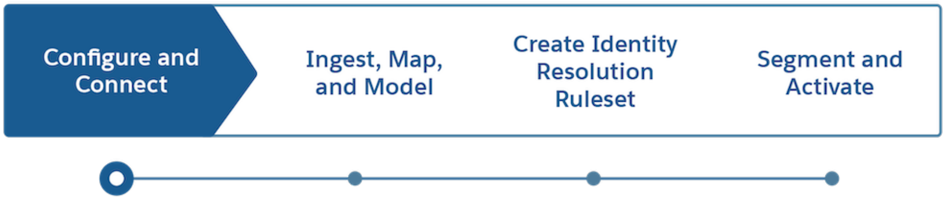
Connect
With the configuration steps complete, let's review Pia's remaining tasks.

Summary
Let's review Pia's completed implementation steps.

Overview of Salesforce CDP Implementation Steps

To set up a new Salesforce CDP org, there are several implementation steps to complete.

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



Configure and Connect

The Salesforce CDP admin updates the permission set, provisions the Salesforce CDP account, creates users, and establishes connections with data sources.

Ingest, Map, and Model

Data drives Salesforce CDP functionality. These steps for the data-aware specialist to complete are essential to set up the marketer for success in creating segments.

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

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

Create Identity Resolution Rulesets

Identity Resolution is a key feature of Salesforce CDP because it helps organizations identify customers and create a Unified Profile of each customer. The data-aware specialist follows these steps.

- Create a ruleset.
- Configure matching rules.
- Select reconciliation rules.

Segment and Activate

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

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

Customer Data Platform Use Case

Northern Trail Outfitters (NTO) is eager to use Marketing Cloud Customer Data Platform to help build more personalized marketing campaigns based on data from multiple sources.

NTO Users

The NTO team identifies these Customer Data Platform users and their responsibilities.

Marketing manager, Isabelle Givens—Manages the overall segmentation strategy and identifies the target campaigns.

Admin, Pia Larson—Configures Customer Data Platform, provisions users, and assigns permission sets within the system. Has access to Salesforce Sales and Service Clouds in addition to other integrated systems within the core cloud platform. Also executes day-to-day configuration, support, maintenance, and regular system audits.

Data aware specialist, Warren Mehta—Manages the data model defined by the marketing manager and marketing specialist. Creates and manages data streams, and harmonizes those data streams into a cohesive data model to be used to build effective segments. Creates identity resolution rulesets and assists with any API development needed for NTO. The data-aware specialist also assists with creating SQL-based calculated insights.

Marketing specialist, Michele Hansley—Creates, manages, and publishes segments.

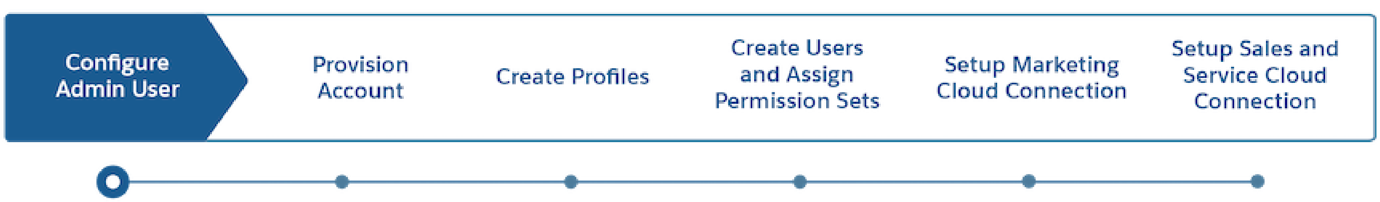
NTO Requirements

NTO has these initial requirements:

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

Configure

Let’s review the implementation steps admin completes to configure Salesforce CDP.



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

Here are the configuration and connection steps that the Salesforce CDP admin, must complete.

- Configure Salesforce CDP Admin User.

- Provision Salesforce CDP Instance.
- Create Profiles.
- Create Users and Assign Permission Sets.
- Set Up Marketing Cloud Connection.
- Set Up Sales and Service Cloud Connection.

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

Set Up Your Salesforce CDP Account
Prepare your Salesforce CDP account for data ingestion, modeling, segmentation, and activation by following the administrator steps.

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

Create Users and Assign Salesforce CDP Permission Sets
Create users and change your permission sets in your Salesforce org to prepare Salesforce CDP users.

Configure a Salesforce CDP Admin User

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

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

Set Up Your Salesforce CDP Account

EDITIONS

Available in: Lightning Experience

Prepare your Salesforce CDP account for data ingestion, modeling, segmentation, and activation by following the administrator steps.

After purchasing Salesforce CDP, you'll receive either an org verification email including your administrator login credentials and link, or an email from your account team with your credentials. Use the link or credentials to log in.

1. Click your org verification email link or the link in the email from your account team.
2. Assign Salesforce CDP Permission Sets.
3. Provision Salesforce CDP.

4. Continue setting up users following Create Users and Assign Salesforce CDP Permission Sets on page 5.

Your Salesforce CDP account is created and ready for use.

Create Salesforce CDP User Profiles

Create user profiles for the Salesforce CDP user roles. These roles are for: Salesforce CDP Marketing Manager, Salesforce CDP Marketing Specialist, and Salesforce CDP Data-Aware Specialist.

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

Create Users and Assign Salesforce CDP Permission Sets

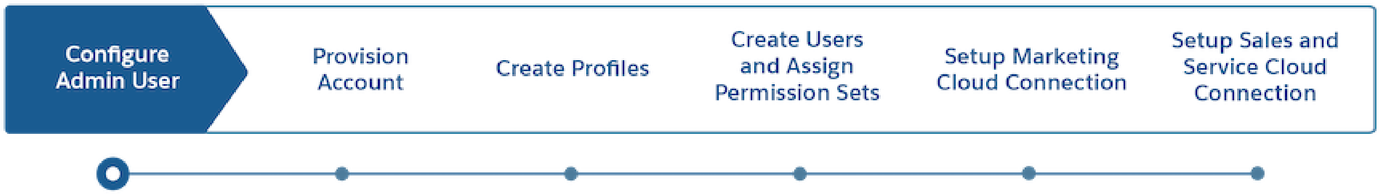
Create users and change your permission sets in your Salesforce org to prepare Salesforce CDP users.

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

8. From the user screen, click **Edit Assignments** under Permission Set Assignments.
9. Assign the appropriate permission set to that user.
10. Save your changes.

Connect

With the configuration steps complete, let's review Pia's remaining tasks.



- Configure Salesforce CDP Admin User: DONE
- Provision Salesforce CDP Instance: DONE
- Create Profiles: DONE
- Create Users and Assign Permission Sets: DONE
- **Set Up Marketing Cloud Connection.**
- **Set Up Sales and Service Cloud Connection.**

Set Up Marketing Cloud Connection in Customer Data Platform
After you create your Customer Data Platform instance, you can control the scope of data ingestion and activation from Marketing Cloud and other sources. Before integrating Marketing Cloud with Customer Data Platform, make sure that your Marketing Cloud user's default business unit (BU) is set to the Enterprise ID (EID). You also can set up your data sources to tell Customer Data Platform where to pull data, also known as ingest, from for data mapping and segments. Customer Data Platform only supports Marketing Cloud Enterprise 2.0 account connections.

Set Up Salesforce CRM Connection
After you create your Customer Data Platform instance, you can set up a connection to your Salesforce CRM org. Control the scope of data ingestion, data action targets, and activation from Salesforce CRM.

Set Up Marketing Cloud Connection in Customer Data Platform

After you create your Customer Data Platform instance, you can control the scope of data ingestion and activation from Marketing Cloud and other sources. Before integrating Marketing Cloud with Customer Data Platform, make sure that your Marketing Cloud user's default business unit (BU) is set to the Enterprise ID (EID). You also can set up your data sources to tell Customer Data Platform where to pull data, also known as ingest, from for data mapping and segments. Customer Data Platform only supports Marketing Cloud Enterprise 2.0 account connections.

Note: If you set up a Marketing Cloud connection before the Spring '22 release, skip to step 13 to enable the BU aware integration between Customer Data Platform and Marketing Cloud.

1. From Setup, click **CDP Setup**.
2. Under Configuration, click **Marketing Cloud**.

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

   Note: We recommend using a dedicated Marketing Cloud user account for integration with Customer Data Platform. Work with your Marketing Cloud administrator to create the account. Administrator and Marketing Cloud Administrator user roles and permissions are required.

5. To enable the channels so that Customer Data Platform can pull in data, click **Manage** for Setup bundles to ingest into Customer Data Platform.

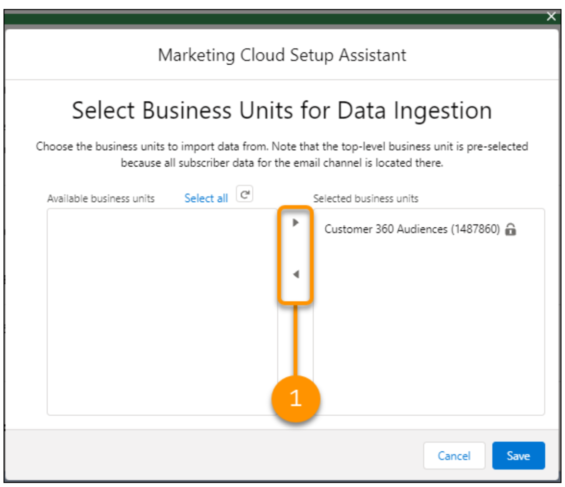
   If you don't want to ingest data from Marketing Cloud, click **Skip**.

   The available channels in the connected Marketing Cloud instance are highlighted.

6. To enable the highlighted channels so that Customer Data Platform can pull in data using the Customer Data Platform Starter Bundles, click **Start**.
7. You see three data bundle sources: Email, MobileConnect, and MobilePush. Data bundles allow you to quickly and easily create multiple data streams to ingest system-owned data from Marketing Cloud. You can manually add more data extensions afterward.

   Note: Customer Data Platform creates a set of automations and automation activities in Marketing Cloud Automation Studio to support data ingest. These automations transfer data between the two products. Don't alter or edit these activities.

8. To select which business units to ingest data from, click **Manage**.
9. From Setup, use the arrows (1) to select the business unit name to add, remove, or move.



   The top-level business unit is preselected and can't be deselected because all subscriber data for the email channel is at that level.

10. Save your changes.

    To enable business unit mapping, this step is required.

11. To select which business units to activate segments to, click **Manage**.
12. Use the arrows to add or remove business units in Selected business units.

    Note: You can select any number or combination of business units independent of the BUs selected for ingest.

13. To automatically map Marketing Cloud subscriber data to the Affiliation Data Model Object (DMO), enable **Allow Profile Business Unit Mapping Data**.

Warning: Enabling **Allow Profile Business Unit Mapping Data** is permanent and can't be undone.

14. The new SFMC Subscriber BU Mapping Data Stream is created and mapped to the Affiliation DMO.

Important: Data can take up to 24 hours to appear in the Affiliation DMO. Until data is ingested into the Affiliation DMO, activations are sent to Marketing Cloud as shared data extensions. After successful ingestion, activations are sent as data extensions automatically.

Tip: Since the SFMC Subscriber BU Mapping Data Stream gets a full refresh one time a day, view the refresh history for the latest status details.

a. To map other data to the Affiliation DMO:

- Create a relationship between the Party field of the Affiliation DMO and the Individual Id field of the Individual DMO with the cardinality of ManyToOne.
- Create a data stream and map data to the Affiliation DMO.

Table 1: Affiliation DMO Fields

Field Label	Field API Label	Description	Mapping Requirements
Affiliation ID	ssot__Id__c	Unique value for each individual.	Required
Party	ssot__PartyId__c	Information about the individual. Default mapping is to the Marketing Cloud Subscriber Key field.	Required
Affiliated To	ssot__AffiliatedTo__c	Information about the business unit. For example, brand or region. Default mapping is to the Marketing Cloud MID. Tip: This field ensures activations are sent to the right business unit in Marketing Cloud.	Required
Affiliation Type	ssot__AffiliationType__c	Type or category of the affiliation. For example, product category or other granular details.	Optional

Set Up Salesforce CRM Connection

After you create your Customer Data Platform instance, you can set up a connection to your Salesforce CRM org. Control the scope of data ingestion, data action targets, and activation from Salesforce CRM.

EDITIONS

Available in: **Lightning Experience**

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

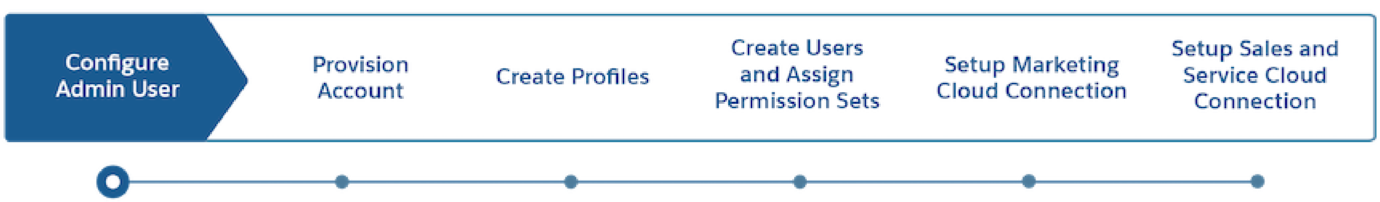
Note: If you have My Domain activated when setting up a connection between an external CRM and Salesforce CDP, you must select either **Don't redirect (recommended)** or **Redirect to the same page within the domain** from My Domain Settings.

1. In Customer Data Platform, select then **CDP Setup**.
2. Select **Salesforce CRM**.
3. To connect a Salesforce org to Customer Data Platform, click **New**. You can connect the Salesforce org that has Customer Data Platform provisioned, or you can **Connect Another Org** (external orgs).
4. To connect your Salesforce orgs to Customer Data Platform, click **Connect**. If connecting an external Salesforce org, enter your user credentials to establish the connection with Customer Data Platform.
5. After you connect your Salesforce org, you can view the connection details.
   - Connector Name: The name of the Salesforce org that is connected to Customer Data Platform.
   - Connector Type: Identifies the name of the data connection type.
   - Status: Shows the org's status.
   - Org Id: The Salesforce org Id connected to Customer Data Platform. Updated: The date and timestamp of when the Salesforce org was connected to Customer Data Platform.

   Your Salesforce org is now connected as a data source and data action target.

Summary

Let's review Pia's completed implementation steps.



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