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# Account Engagement: Data Cloud Integration Implementation Guide

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# USE DATA CLOUD SEGMENTS IN ACCOUNT ENGAGEMENT

Connect Account Engagement with Data Cloud for Marketing to create dynamic lists that you can use to personalize marketing assets. Harness customer data from all interactions that contacts have with your company.

Here's an overview of what's required to set up the integration. Depending on your org structure, it's possible you need a Data Cloud Marketing Manager or Specialist, a Salesforce admin, and an Account Engagement admin.

- In Data Cloud, select an Account Engagement business unit to connect.
- In Data Cloud, add and map the prospect data to Data Cloud DMOs.
- In Data Cloud, create a segment to use in a dynamic list in Account Engagement.
- In Account Engagement, create a dynamic list based on your Data Cloud segment.

## [Considerations for Using the Account Engagement and Data Cloud Integration](#)

When integrating Data Cloud with Account Engagement, keep these considerations in mind.

### [Connect Account Engagement Business Units to Data Cloud](#)

Connect an Account Engagement business unit to Data Cloud. After you connect a business unit, you can use Data Cloud segments in dynamic lists.

### [Add Additional Account Engagement Fields to Salesforce CRM Data Streams](#)

This integration requires you to add the Account Engagement Integration ID custom field to the data model object (DMO), and map the Contact or Lead ID to that field. To use additional Account Engagement fields in Data Cloud, update the Data Cloud Salesforce Connector permission set and add the fields to the data streams.

### [Map Data Streams to Data Model Objects](#)

When Account Engagement fields are added to the data streams, you can map them to Data Cloud Data Model Objects to be used in segments.

### [Create a Segment in Data Cloud](#)

Create a segment in Data Cloud using Account Engagement data.

### [Create Dynamic Lists From Data Cloud Segments](#)

After you add the custom field to the data model object (DMO), and map your fields, you can create a dynamic list in Account Engagement to pull in Data Cloud your segment.

## Considerations for Using the Account Engagement and Data Cloud Integration

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When integrating Data Cloud with Account Engagement, keep these considerations in mind.

- You can use Data Cloud segments in Account Engagement business units that are connected to Data Cloud via the Account Engagement Setup page in Data Cloud Setup.
- You can connect only Account Engagement business units that are associated with your Data Cloud Home Org.
- To use the integration, you must have both Account Engagement and Data Cloud connected to the same Salesforce org.

### EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Account Engagement

- This integration requires you to add the Account Engagement Integration ID custom field to the data model object (DMO), and map the Contact ID or Lead ID to that field. You can also map additional Account Engagement fields to the DMO you're segmenting on.
- Data Cloud segments and Account Engagement dynamic lists update automatically based on criteria. We recommend monitoring your segments and dynamic lists over time so you can adjust your criteria as needed.
- An activation target isn't required when you create a segment in Data Cloud for Account Engagement. The warning that displays when you publish without an activation target doesn't apply if the segment is for Account Engagement.
- You can have up to five dynamic lists based on Data Cloud segments and up to one million prospects per list.
- Only published segments are available to use with dynamic lists in Account Engagement.
- A segment can be connected to only one dynamic list at a time.
- After a Data Cloud segment is refreshed, it can take up to an hour for a dynamic list to update in Account Engagement.
- A new dynamic list can take up to 3 hours to populate the first time it's connected to a Data Cloud segment.

## Connect Account Engagement Business Units to Data Cloud

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Connect an Account Engagement business unit to Data Cloud. After you connect a business unit, you can use Data Cloud segments in dynamic lists.

1. From Setup, in the Quick Find box, enter *Data Cloud Setup*.
2. Under Configurations, select **Account Engagement**.
3. Click **Get Started**.
4. Add the Account Engagement business units that you want to connect to Data Cloud to the Selected Business Unit column, and then click **Done**.

You can also add or remove business units later.

### EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Account Engagement


### USER PERMISSIONS

To configure Data Cloud:

- Customer Data Cloud Admin

## Add Additional Account Engagement Fields to Salesforce CRM Data Streams

This integration requires you to add the Account Engagement Integration ID custom field to the data model object (DMO), and map the Contact or Lead ID to that field. To use additional Account Engagement fields in Data Cloud, update the Data Cloud Salesforce Connector permission set and add the fields to the data streams.

 **Note:** Before you add more fields, you must create the required Salesforce CRM data streams. Use the Sales Data bundle to make the fields available for Lead and Contact objects.

1. From Setup, in the Quick Find box, enter *Permission Sets*.
2. Click the **Data Cloud Salesforce Connector** permission set and select **Object Settings**.
3. Select **Contacts** and then click **Edit**.
4. Add Read Access to the fields within the permission set, then click **Save**. Repeat this process for the Lead object.
5. In Data Cloud, on the Data Streams tab, select the **Salesforce CRM data stream** for Contacts.
6. Click **Add Source Fields**, select the fields that you want to add to your data stream, and click **Save**.
7. Repeat Steps 5 and 6 for the Lead data stream.

### EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Account Engagement

### USER PERMISSIONS

To configure Data Cloud and edit Data Streams:

- Data Cloud Data Aware Specialist

To edit permission sets:

- Salesforce Admin

## Map Data Streams to Data Model Objects

When Account Engagement fields are added to the data streams, you can map them to Data Cloud Data Model Objects to be used in segments.

A Data Cloud Data Aware Specialist performs these steps.

1. Go to the Data Streams tab.
2. Select the **Salesforce CRM data stream** for Contacts.
3. Click **Review Data Mapping**.
4. Click **Select Objects**.

The field-mapping canvas shows your source data lake objects (DLOs) on the left and the target data model objects (DMOs) on the right. You can select an object from your data model or add a custom object to your data model.

5. To create a mapping connection, select the DLO field to map and click the related DMO field. A confirmation appears with an arrow connecting the fields.
6. To pull Data Cloud segment membership into Account Engagement, create a custom field in your DMO named Account Engagement Integration ID and map the Lead or Contact ID to that field.
7. Save your work.
8. Repeat Steps 2 through 7 for the Lead data stream.

### EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Account Engagement

### USER PERMISSIONS

To map Account Engagement to Data Cloud:

- Data Cloud Data Aware Specialist

SEE ALSO:

[Data Mapping](#)

# Create a Segment in Data Cloud

Create a segment in Data Cloud using Account Engagement data.

Available with add-on license: **Segmentation and Activation**

Before you create a segment to use in Account Engagement, you must add the Account Engagement Integration ID custom field to the data model object (DMO) you're segmenting on, and map the Contact ID or Lead ID to that field.

1. In Data Cloud, click **Segments**.
2. Click **New**.
3. Click the **Segment On** dropdown menu and select the data model object (DMO) that your segment is built on.
4. Give your segment a unique name that's easily identifiable.
5. Set a schedule for your segment to publish to activation targets. We recommend selecting **Don't Refresh** until you have defined rules for your segment.
6. Click **Save**.
7. Drag attributes from the library onto the segment canvas to set filter criteria for your segment.  
Each attribute can be dragged into its own container or combined with other attributes in the same container to create an AND or an OR relationship between the attributes.
8. Save your work.
9. On the segment details page, click **Edit Properties** to set a publish schedule for your segment or click the dropdown menu and select **Publish Now**.  
Only published segments are available to use in Account Engagement dynamic lists.

## USER PERMISSIONS

To create segments in Data Cloud:

- Data Cloud Marketing Manager OR Data Cloud Marketing Specialist



## Create Dynamic Lists From Data Cloud Segments

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After you add the custom field to the data model object (DMO), and map your fields, you can create a dynamic list in Account Engagement to pull in Data Cloud your segment.

1. Open the Lists page.
  - In Account Engagement, select **Marketing > Segmentation > Lists**.
  - In the Lightning app, select **Prospects**, and then **Segmentation > Segmentation Lists**.
2. Click **+ Add List**, and name the list. We recommend using a similar name as the Data Cloud segment you connect the dynamic list to.
3. Select **Dynamic List**.
4. Click the Dynamic List Type dropdown and select **Data Cloud segment**.
5. Click the Data Cloud Segment dropdown menu and select a Data Cloud segment.
6. Click **Create List**.

SEE ALSO:

[Create a Dynamic List](#)

### EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Account Engagement

### USER PERMISSIONS

To add segments to a dynamic list in Account Engagement:

- Account Engagement Administrator or Marketing role AND Data Cloud Marketing Manager or Data Cloud Marketing Specialist