

salesforce

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# Implementation Guide: Marketing Cloud Growth

Salesforce, Summer '24

'24





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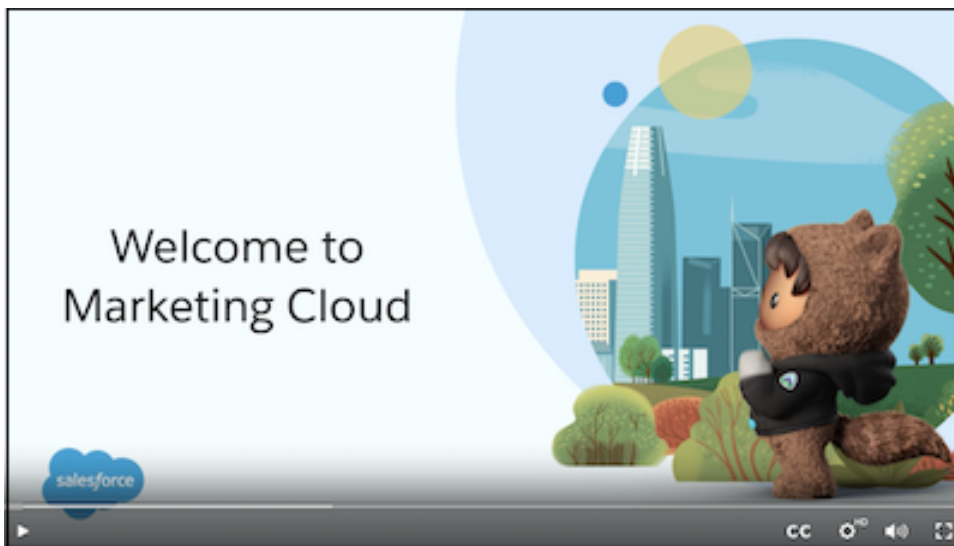


# MARKETING CLOUD

Marketing Cloud brings the power of the platform to your team's marketing efforts. You can integrate multiple data sources with Data Cloud, build content with Digital Experiences, power complex customer journeys with Flow Builder, and optimize with Einstein along the way.

## EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition



Dive into Marketing Cloud with videos.

- [Welcome to Marketing Cloud Growth](#)
- [Quick Tips Playlist: Editing Emails](#)
- [Quick Tips: Add Elements to a Campaign Flow](#)
- [Quick Tips: Replacing Segments in a Campaign Flow](#)



Use Trailhead to build and test your skills.

- [Email Marketing Use Cases](#) for Marketing Cloud and Salesforce Starter



Say hello to the world of developer documentation.

- [Marketing Cloud Growth Developer Guide](#)



Drive successful outcomes with Salesforce resources.

- [Marketing Setup Implementation Guide](#)

- [Setup Checklist](#)

Marketing Cloud is a new offering from Salesforce. For information about other Marketing Cloud products, see these articles.

- [Marketing Cloud Account Engagement](#) (Pardot)
- [Marketing Cloud Engagement](#) (Marketing Cloud)
- [Marketing Cloud Personalization](#) (Interaction Studio)
- [Marketing Cloud Intelligence](#) (Datorama)

### [Manage Your Marketing App](#)

Salesforce admins, Data Cloud admins, and marketing admins have a role to play in configuring and managing Marketing Cloud. Before you get started, determine whether these admin roles roll up to a single user or if many people are involved.

### [Increase Productivity with AI](#)

In Marketing Cloud, predictive and generative AI tools from Einstein help you improve work outcomes and day-to-day productivity.

### [Helpful References](#)

Reference lists and tables are available to help you learn terminology, identify available options, troubleshoot issues, and other admin tasks.

## Manage Your Marketing App

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Salesforce admins, Data Cloud admins, and marketing admins have a role to play in configuring and managing Marketing Cloud. Before you get started, determine whether these admin roles roll up to a single user or if many people are involved.

### [Who's Involved in Marketing Cloud Setup](#)

Because Marketing Cloud uses different parts of the Salesforce ecosystem, it's important to gather the right people before you get started. At minimum, you need a Salesforce admin and a Data Cloud admin. You can also choose to assign a marketing admin.

### [Getting Started with Marketing Cloud Setup](#)

Setting up Marketing Cloud includes a few phases: Basic Settings, Channels, and Reporting and Optimization. The time it takes to complete depends on the features that you want to use.

### [Required Setup for Marketing Cloud](#)

Before you begin customizing the Salesforce experience, you must complete several important tasks, such as installing data kits and verifying settings that support compliance with consent regulations.

### [Recommended Setup for Marketing Cloud](#)

In addition to the required settings, setup includes recommended tasks to customize Marketing Cloud to meet the needs of your business.

### [Create and Publish a Brand in Marketing Cloud Growth](#)

Each brand that you create is stored in your content workspace and is available for marketers to select when they create content. If you save your brand in a workspace that's shared with another workspace, you can apply the brand to an email or landing page in the shared workspace.

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

## Who's Involved in Marketing Cloud Setup

Because Marketing Cloud uses different parts of the Salesforce ecosystem, it's important to gather the right people before you get started. At minimum, you need a Salesforce admin and a Data Cloud admin. You can also choose to assign a marketing admin.

### Salesforce Admin

A Salesforce admin has permissions to complete tasks in Salesforce Setup, which you can access by clicking the  on any page.

### Data Cloud Admin

A Data Cloud admin has permissions in Data Cloud Setup and on other data modeling objects.

To add this critical infrastructure to your org, a Marketing Cloud admin must install data kits and deploy data streams. Data Cloud admins also configure identity resolution and people scoring rules.

### Marketing Admin

A marketing admin is any user with the Marketing Cloud Admin permission set. Users with this permission can configure most settings on Salesforce Setup pages and publish and activate campaigns and segments.

#### EDITIONS


Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

## Getting Started with Marketing Cloud Setup

Setting up Marketing Cloud includes a few phases: Basic Settings, Channels, and Reporting and Optimization. The time it takes to complete depends on the features that you want to use.

### Prepare for Setup

Before you start, make sure that you have the necessary roles and permissions to complete Marketing Cloud Growth setup. See [Who's Involved in Marketing Cloud Growth Setup](#) on page 3.

To access Marketing Cloud Growth Setup, click . From the Quick Find box, enter *Assistant* and then select **Assistant Home**.

For an overview of each setup phase, check out this video.

 [Watch a video](#)

You can also download the [Marketing Cloud Growth Setup checklist](#) to track your progress along the way.

#### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition


## Verify the Prerequisites

Estimated time: Up to 15 minutes

On the Basic Settings page, under Prerequisites, confirm that you have the basic requirements to set up Marketing Cloud. Data Cloud must be enabled, and you need a Salesforce CRM connector and a default email channel. These tasks are initiated when you purchase Marketing Cloud Growth and must be completed before you can access the rest of setup.

When all prerequisites are complete, click **Enable Marketing Cloud** to start the automated process of connecting the necessary content and privacy tools, which can take a few minutes.

If you run into issues, here are some troubleshooting steps.

- If Data Cloud isn't enabled—A Data Cloud admin must enable Data Cloud. In the App Launcher, search for and select **Data Cloud**. Click  to access Data Cloud Setup and enable it.
- If the Salesforce CRM connector isn't created—A Data Cloud admin must create the Salesforce CRM connector. In Data Cloud Setup, open the Connectors page, and click **New**. Select **Salesforce CRM**, and follow the prompts.

- If the default email channel isn't created—The default email channel in Salesforce CMS is where marketing emails are stored. An admin can't create this channel. Contact Salesforce Customer Support for help.
- If you haven't added data protection details to records—From Setup, in the Quick Find box, enter *Data Protection and Privacy*, and then select **Data Protection and Privacy**. Select the option to make data privacy data protection details available in records.
- If the content management or privacy tools aren't created—Contact Salesforce Customer Support.

## Continue Setup

Estimated time: Variable

After you complete the prerequisites, add and configure the data model objects (DMOs) that support marketing assets. In the Basic Settings section, go to the Marketing Data tab to start the next set of required steps.

Other required tasks, such as adding users, installing analytics packages, and configuring DKIM authentication, appear throughout the Setup pages. The time to complete these tasks depends on the number of users and your access to DKIM setup. See [Required Setup for Marketing Cloud Growth](#) on page 4.

Setup also includes recommended tasks to help you make the most of Marketing Cloud, like activating Einstein features or customizing your domain. See [Recommended Setup for Marketing Cloud Growth](#) on page 20.

## Required Setup for Marketing Cloud

Before you begin customizing the Salesforce experience, you must complete several important tasks, such as installing data kits and verifying settings that support compliance with consent regulations.

### [Preparing Your Marketing Cloud Org](#)

One of the things that makes Marketing Cloud so powerful is its relationship to Data Cloud. When you install and deploy data kits and packages, you add and configure the data model objects (DMOs) that support marketing assets, performance metrics, and regulatory data. Each data kit contains a collection of data bundles, objects, fields, and other settings that make Marketing Cloud work. Each package has its own related setup tasks.

### [Ensure Compliance with Consent Settings](#)

Marketing Cloud can help you stay in compliance with regulatory bodies and provide your customers with their preferred experience. These tools help you organize contact details, communication subscriptions, and preference forms.

### [Activity Tracking in Marketing Cloud](#)

Track visitor activities and engagement across your marketing web pages. Use the data to create more targeted segments and inform your marketing strategy. You can track activity on landing pages hosted by Marketing Cloud and on external websites.

### [Configure Required Email Settings](#)

To send emails with Marketing Cloud, you must verify at least one sender email address, provide a physical address to include in your email, and configure DKIM (DomainKeys Identified Mail) authentication.

### [Set Up SMS Messages in Marketing Cloud](#)

When you have the SMS messaging add-on, you can create and send SMS messages from Marketing Cloud. Before you can start sending, your business must request and register one or more codes. Short codes and long codes are the numbers associated with incoming and outgoing messages. The registration process can take several weeks, so make sure to plan ahead.

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition



## Preparing Your Marketing Cloud Org

One of the things that makes Marketing Cloud so powerful is its relationship to Data Cloud. When you install and deploy data kits and packages, you add and configure the data model objects (DMOs) that support marketing assets, performance metrics, and regulatory data. Each data kit contains a collection of data bundles, objects, fields, and other settings that make Marketing Cloud work. Each package has its own related setup tasks.

This table lists the data kits that you must install to use Marketing Cloud. The Setup label is used in Marketing Cloud Growth setup, and the package names appear on the installation and data stream deployment pages. See [Install and Deploy Data for Marketing Cloud Growth](#) on page 8.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Setup Label	Package Name	Install	Deploy	Details
Marketing Setup Objects Data Kit	Marketing Cloud Consent Objects	✓	✓	Contains two data bundles, MarketingSetup_General and SMSAddOn_General. The SMS bundle is required only when using the SMS add-on.
Consent Objects Data Kit	UnifiedMessagingConsent	✓	✓	Contains ConsentAuditTrail and MessagingConsent data streams.
Flows Integration Data Kit	Salesforce Data Cloud - Flow Integration	✓	✓	Contains the Flows data bundle and two Flow Run data streams that work with the Ingestion API.
Email Channel Data Kit	MessagingEventsEmailEngagement	✓	✓	Contains a MessagingEventsEmail data stream.
SMS Channel Data Kit	MessagingEventsSms	✓	✓	Contains a MessagingEventsSMS data stream. This data kit is only required when using the SMS add-on.
Sales	—	✓	✓	Contains data streams for accounts, leads, and contacts. Access the

Setup Label	Package Name	Install	Deploy	Details
				installation page for this data kit in Data Cloud Setup.
Marketing Engagement Analytics	UMA Analytics	✓	—	This package contains Analytics folders for dashboards and reports. You can add users to each folder on the Analytics tab.
Flow Reports Analytics	Salesforce Data Cloud - Flow Reports	✓	—	This package contains Analytics folders for dashboards and reports. You can add users to each folder on the Analytics tab.
SMS Analytics	UMA Analytics (SMS)	✓	—	This package contains Analytics folders for dashboards and reports. You can add users to each folder on the Analytics tab.  This package is available only when using the SMS add-on.
Landing Pages and Forms Analytics	Marketing Analytics - Landing Pages and Forms	✓	—	This package contains Analytics folders for dashboards and reports. You can add users to each folder on the Analytics tab.  Before you install this package, add Data Cloud integrations to the default Marketing Landing Pages site.

### [Install and Deploy Data Streams for Marketing Cloud](#)

Several data kits are required to support Marketing Cloud. For most data kits, you install the data kit package and then a Data Cloud admin can create and deploy its related data streams.

### [Assign Permission Sets for Marketing Cloud](#)

You can create users and assign permissions after setting up the data streams or wait to complete additional customizations. To ensure that users have access to the right objects and features, we recommend using the default Marketing Cloud Admin or Marketing Cloud Manager permission sets.

### [Add Workspace Contributors to Marketing Cloud](#)

When marketers create content in Marketing Cloud, they use Digital Experiences tools, which require a different set of permissions. Choose a contributor role for each user who needs access to manage or create marketing content, such as emails and forms.

### [Add Site Contributors to Marketing Cloud](#)

To let users preview landing pages in Marketing Cloud as authenticated users, add contributors to the Marketing Landing Pages site. Assign the Viewer role to each contributor. Site contributors must also be site members.

### [Create an Identity Resolution Ruleset for Marketing Cloud](#)

Identity resolution is a critical step to organizing and unifying your data. Usually, when your data originates from many systems, it's modeled and labeled differently in each place. Identity resolution rulesets define the relationships among data model objects (DMOs) and their fields. After you configure these rules, Data Cloud can organize related and duplicate data into unified individual records that marketers can use to target audiences.

## Install and Deploy Data Streams for Marketing Cloud

Several data kits are required to support Marketing Cloud. For most data kits, you install the data kit package and then a Data Cloud admin can create and deploy its related data streams.

### Install the Data Kits

Data kits and packages contain the objects, fields, and settings that make Marketing Cloud work. To begin the data configuration process, install the data kits and packages listed in the Basic Settings section of Marketing Cloud Setup.

1. Install the Marketing data kits.
  - a. From Setup, in the Quick Find box, enter *Basic*. Under Marketing Setup, click **Basic Settings**.
  - b. Click **Marketing Data**.
  - c. In the Install Marketing Data Kits section, next to the first data kit in the list, click **Install**.
  - d. On the install page, select **Install for All Users**, and then click **Install**.
  - e. Repeat these steps to install the other data kits.
2. Install the Sales data kit.
  - a. From Setup, in the Quick Find box, enter *CRM*. Under Data Cloud Configuration, click **Salesforce CRM**.
  - b. Next to Sales Cloud, click , and select **Install**.
  - c. Install the data kit for all users.
 

The SMS Channel Integration data kit is required only for orgs with the SMS add-on.

Next, deploy the data streams for each data kit.

### Deploy the Required Data Streams

Installing the data kits added the objects and fields that store marketing data. To make the data that you capture available to your marketing tools and processes, set up data streams in Data Cloud. The data streams are already defined in the package. You only need to deploy them.

Initiating data streams counts toward [Data Cloud usage](#).

1. From the App Launcher, find and select Data Cloud.
2. Deploy the data streams. Repeat this step for these CRM data bundles: Sales, Flows, MarketingSetup\_General, and SMSAddOn-General.
  - a. On the Data Streams tab, click **New**.
  - b. Select **Salesforce CRM**.
  - c. Select the Salesforce org that you're working with, and click **Data Bundles**.

#### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

#### USER PERMISSIONS

To install data kits and packages:

- View Setup and Configuration

OR

Salesforce Admin profile

OR

Marketing Cloud Admin permission set

To deploy data streams:

- Marketing Cloud Admin permission set

OR

Marketing Cloud Manager permission set

To add Digital Experiences integrations:

- Content Admin role

To customize the Analytics tab:

- Marketing Cloud Admin permission set

OR

Marketing Cloud Manager permission set

Select a Salesforce org and a Data Bundle or Object to create a new data stream.

\*Salesforce Org  
Company ABC

Data Bundles All Objects

**Standard Data Bundles (2)**

- Sales  
3 Objects - Created by Salesforce
- Service  
23 Objects - Created by Salesforce

**Custom Data Bundles (3)**

- Flows  
3 Objects
- MarketingSetup\_General  
7 Objects
- SMSAddOn\_General  
2 Objects

- d. Make sure that the default data space is selected.  
The data stream name and other field values are predefined by the package and can't be changed.
  - e. Review the configuration, and then click **Deploy**.
3. Deploy the remaining data streams. Repeat these steps for each data stream in the MessagingEventsEmailEngagement, MessagingEventsSMS, Salesforce Data Cloud - Flow Integration, and UnifiedMessagingConsent data kits.
    - a. On the Data Streams tab, click **New**.
    - b. Select **Installed Data Kits and Packages**.
    - c. Select the default data space.
    - d. On the Installed Packages tab, select one of the packages that you installed.
    - e. Select a data stream from the list.  
Some data kits include more than one data stream. Select and deploy each data stream individually.

Data Kit	Packages						
MessagingEventsEmailEngagement Salesforce	<p><b>Salesforce Data Cloud - Flow Integration (2)</b></p> <table border="1"> <thead> <tr> <th>Data Stream Name</th> <th>Connector type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> dc_flow_sdb3__Flow_Runs_FlowElementRun...</td> <td>Ingestion API</td> </tr> <tr> <td><input type="radio"/> dc_flow_sdb3__Flow_Runs_FlowRun_28EAE...</td> <td>Ingestion API</td> </tr> </tbody> </table>	Data Stream Name	Connector type	<input checked="" type="radio"/> dc_flow_sdb3__Flow_Runs_FlowElementRun...	Ingestion API	<input type="radio"/> dc_flow_sdb3__Flow_Runs_FlowRun_28EAE...	Ingestion API
Data Stream Name	Connector type						
<input checked="" type="radio"/> dc_flow_sdb3__Flow_Runs_FlowElementRun...	Ingestion API						
<input type="radio"/> dc_flow_sdb3__Flow_Runs_FlowRun_28EAE...	Ingestion API						
Salesforce Data Cloud - Flow Integration C360 SDB3 Patch							

- f. Review the fields that you're adding, and click **Deploy**.  
The data stream name and other field values are predefined by the package and can't be changed.

As you deploy data streams, they're removed from the package list. When every Marketing Cloud package shows an empty list, you're done with this step. After you create all the data streams, configure your analytics data.

## Install and Connect Analytics Objects

After the data streams are deployed, you can install the analytics packages and add users to analytics folders. Then, head to Digital Experiences to finalize the data connection.

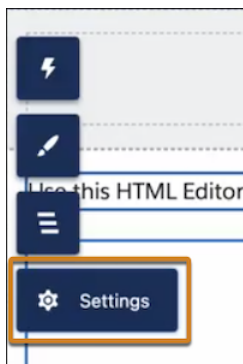
You can assign access to the analytics folder by user or group. For each assignment, choose either Viewer, Editor, or Manager permissions. Apply permissions for these folders.

- Email Engagement Dashboard
  - Email Engagement Reports
  - Flow Reports
  - Forms Engagement Dashboards
  - Forms Engagement Reports
  - Landing Page Engagement Dashboards
  - Landing Page Engagement Reports
  - SMS UMA Dashboards
  - UMA SMS Reports
1. From Setup, in the Quick Find box, enter *Reporting*. Under Marketing Setup, click **Reporting and Optimization**.
  2. Click **Campaign Analytics**.
  3. From the Install Analytics Packages section, install the Marketing Engagement Analytics package for all users.
  4. (Optional) If you're using the SMS add-on, repeat these steps for the SMS Analytics package.
  5. (Optional) Configure tracking and analytics for the default Marketing Landing Pages site.

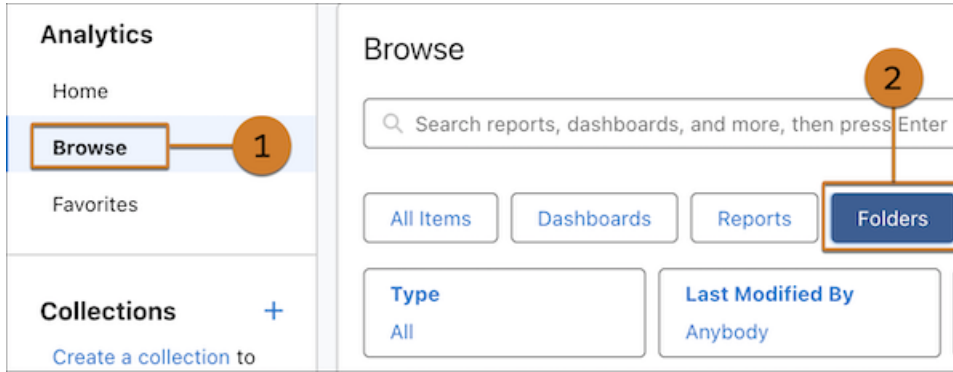
- a. From Setup, in the Quick Find box, enter *All Sites*. Under Digital Experiences, click **All Sites**.
- b. Next to Marketing Landing Pages, select **Builder**.

Landing pages in Marketing Cloud are served using the Sites framework. This site operates behind the scenes—don't add content to it.

- c. Click **Settings** and select **Integrations**.



- d. On the Data Cloud tile, click **Add to Site**.
  - e. (Optional) To collect engagement metrics and consent for tracking on landing pages, add the Data Cloud Web Tracking Consent Banner integration. Then, click **Publish**.  
If you don't need to track consent, skip this step and see [Activity Tracking for Landing Pages](#) on page 14.
  - f. From Setup, go to **Reporting and Optimization > Campaign Analytics** and install the [Landing Pages and Forms Analytics package](#) for all users.
6. From the Marketing Cloud app, make folders available to users.
    - a. On the Analytics tab, click **Browse** (1), and select **Folders** (2).



- b. For each report or dashboard folder, click  and select **Share**.
- c. For Entire Organization, set the access to Viewer.
- d. To add other users or groups, such as Editors or Managers, search for them in the Name field, and then apply the correct role.
- e. Save the changes.

Now that you've installed, deployed, and connected the necessary data, you can move on to other required setup steps.

To avoid data processing issues, preserve field visibility for the Data Cloud Salesforce Connector permission set. Visibility can change when you delete a field, change the permissions on a field, or change the API name for a custom field.

## Assign Permission Sets for Marketing Cloud

You can create users and assign permissions after setting up the data streams or wait to complete additional customizations. To ensure that users have access to the right objects and features, we recommend using the default Marketing Cloud Admin or Marketing Cloud Manager permission sets.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it under Available Permission Sets, and then click **Add**.
5. To remove a permission set assignment, select it under Enabled Permission Sets, and then click **Remove**.
6. Save the permission set assignment.

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets system permission
- OR
- Marketing Cloud Admin permission set

## Add Workspace Contributors to Marketing Cloud

When marketers create content in Marketing Cloud, they use Digital Experiences tools, which require a different set of permissions. Choose a contributor role for each user who needs access to manage or create marketing content, such as emails and forms.

Three contributor roles are available.

### Content Admin


Users who have this role can manage users and sharing settings, and can create and publish all content in a CMS workspace.

### Content Manager

Users who have this role can create and publish all content in a CMS workspace.

### Content Author

Users who have this role can view, edit, and create all content in a CMS workspace.

1. In Marketing Cloud, go to the Content tab and open your workspace.
2. Click  and select **Contributors**.
3. On the Contributors page, click **Add Contributors**.
4. Search for users or public groups.
5. Next to the users or public groups that you want to add, click **+**.
6. Click **Next**.
7. For each user or public group, assign a contributor role.
8. Click **Finish**.

## Add Site Contributors to Marketing Cloud

To let users preview landing pages in Marketing Cloud as authenticated users, add contributors to the Marketing Landing Pages site. Assign the Viewer role to each contributor. Site contributors must also be site members.

When you add site contributors, you choose from a list of users who are site members. Before adding site contributors, see [Add Members to Your Experience Cloud Site](#).

1. From Setup, in the Quick Find box, enter *All Sites*, and then select **All Sites** under Digital Experiences.
2. Next to Marketing Landing Pages, select **Workspaces** from the Action column.
3. Select the **Administration** workspace.
4. To add contributors, select **Contributors > Add Contributors**.
5. Next to the users that you want to add, click **+**, and then click **Next**.
6. For each user, assign the Viewer role.
7. Click **Finish**.

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To add contributors to a workspace:

- Content Admin role

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To add contributors to a site:

- Salesforce Admin profile
- OR
- Be a site member
- AND
- View Setup and Configuration
- AND
- Create and Set Up Experiences



## Create an Identity Resolution Ruleset for Marketing Cloud

Identity resolution is a critical step to organizing and unifying your data. Usually, when your data originates from many systems, it's modeled and labeled differently in each place. Identity resolution rulesets define the relationships among data model objects (DMOs) and their fields. After you configure these rules, Data Cloud can organize related and duplicate data into unified individual records that marketers can use to target audiences.

We recommend creating only one identity resolution ruleset for your Marketing Cloud data. You can create multiple reconciliation rules inside your ruleset.

1. In Marketing Cloud, on the Identity Resolutions tab, click **New**.
2. Select the default data space, and select **Individual** for the Primary Data Model Object.
3. Name the ruleset and save it.
4. On the identity resolution record, in the Match Rules section, click **Configure**.
5. Follow the prompts to create rules that determine when to unify related records.
6. Define which Unified Individual object to use for personalization.
  - a. From Setup, in the Quick Find box, enter *Basic*, and select **Basic Settings**.
  - b. On the Marketing Data tab, in the Create an Identity Resolution Ruleset section, select the Unified Individual object associated with your ruleset.

You can do more with identity resolution, such as create defaults or troubleshoot warnings. For details about fuzzy matching and other ruleset information, see Salesforce Help for Data Cloud.

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

## Ensure Compliance with Consent Settings

Marketing Cloud can help you stay in compliance with regulatory bodies and provide your customers with their preferred experience. These tools help you organize contact details, communication subscriptions, and preference forms.

A default Marketing communication subscription is available. To organize consent records by channel or content types, create at least one communication subscription.

If you manage consent in another platform, you can disable consent checks in Marketing Cloud, but you must affirm responsibility for any compliance-related issues that arise.

### 1. Verify your physical address.

This physical address is the primary address that's used in other parts of Salesforce. If you edit it, those changes appear in other locations.

- a. From Setup, in the Quick Find box, enter *Company*, and then select **Company Information**.
- b. Review or edit the address field.

### 2. Set consent validation preferences.

- a. From Setup, in the Quick Find box, enter *Channels*, and then select **Channels** under Marketing Setup.
- b. On the Messaging Consent tab, review the consent checks for email and SMS.

### 3. To use custom communication subscriptions for your marketing channels, see [Create a Communication Subscription](#) on page 23.

### 4. To create a consent import, see [Import Consent Data](#) on page 24.

### 5. To customize the banner that asks page visitors for consent to track web activity, see [Track Engagement Activity for Landing Pages](#) on page 16.

By default, the email preference page includes the default marketing communication subscription. To add or remove subscriptions, see [Edit the Email Preference Page](#) on page 23.

## Activity Tracking in Marketing Cloud

Track visitor activities and engagement across your marketing web pages. Use the data to create more targeted segments and inform your marketing strategy. You can track activity on landing pages hosted by Marketing Cloud and on external websites.

### [Considerations for Activity Tracking](#)

When working with Marketing Cloud activity tracking, keep these considerations in mind.

### [Tracking Cookies in Marketing Cloud](#)

Marketing Cloud uses cookies to identify page visitors and track their activities. When setting a tracking cookie, a unique identifier is stored for each page visitor, but Salesforce doesn't store personally identifying information. Cookies are set on the root domain, such as [www.salesforce.com](http://www.salesforce.com).

### [Track Activity on Landing Pages](#)

Track visitor activities on your Marketing Cloud landing pages. To protect the privacy of your landing page visitors, use the default consent banner to collect consent to track. You're responsible for complying with privacy laws and regulations applicable to your business.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To manage settings in Salesforce Setup:

- View Setup and Configuration

OR

Salesforce Admin profile

OR

Marketing Cloud Admin permission set

To manage consent:

- Marketing Cloud Admin

OR

Marketing Cloud Manager permission set

### Track Activity on External Sites

Track visitor activities on web pages hosted outside of Marketing Cloud, such as your company website. To protect the privacy of your site visitors, use the default consent banner to collect consent to track. You're responsible for complying with privacy laws and regulations applicable to your business.

## Considerations for Activity Tracking

When working with Marketing Cloud activity tracking, keep these considerations in mind.

- You're responsible for complying with privacy laws and regulations applicable to your business. To protect the privacy of site visitors, use the default consent banner on landing pages and external sites, but you can choose not to collect consent to track.
- Marketing Cloud landing pages are served using the Digital Experiences Sites framework. The default Marketing Landing Pages site operates behind the scenes. Don't add content to it.
- The tracked metrics for Marketing Cloud landing pages and external sites are page views and form submissions.
- If consent to track is required, each visitor's first page view isn't recorded because it occurs before they provide consent.
- To track activity on a landing page, add the Data Cloud integration to the default Marketing Landing Pages site. If you're using the default consent banner for web tracking, also add the Data Cloud Web Tracking Consent Banner integration.
- When you set up tracking to collect consent, the default consent banner is used for both Marketing Cloud landing pages and external websites.
- To track activity on a landing page that uses a custom domain, add a custom URL for that domain in Setup and define the path as `/lp`.

### EDITIONS

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## Tracking Cookies in Marketing Cloud

Marketing Cloud uses cookies to identify page visitors and track their activities. When setting a tracking cookie, a unique identifier is stored for each page visitor, but Salesforce doesn't store personally identifying information. Cookies are set on the root domain, such as `www.salesforce.com`.

Cookie Name	Duration	Classification	Details
<code>guest_uid_essential_&lt;15-char SiteID&gt;</code>	365 days	Not required	This cookie is no longer used, but is set when someone visits a landing page or tracked site.
<code>_sfid_\${domainHash}</code>	730 days	Not required	When someone visits a landing page, the <code>_sfid_\${domainHash}</code> cookie is set and creates a unique ID for that visitor.
<code>sfmc_consent</code>	365 days	Required	The <code>sfmc_consent</code> cookie is set when a visitor opts in or out of tracking from the consent banner. If a

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Cookie Name	Duration	Classification	Details
			visitor opts in, the value is set to True, and the visitor is tracked. If the visitor opts out or ignores the consent banner, the value is set to False, and the visitor isn't tracked.

## Track Activity on Landing Pages

Track visitor activities on your Marketing Cloud landing pages. To protect the privacy of your landing page visitors, use the default consent banner to collect consent to track. You're responsible for complying with privacy laws and regulations applicable to your business.

### [Track Landing Page Activity with a Consent Banner](#)

To protect the privacy of your landing page visitors, use the default web banner to collect consent for tracking. You can customize the web banner style in Setup, or use the default styles. Then, publish the banner to your Marketing Landing Pages site in Digital Experiences.

### [Track Activity Without a Consent Banner](#)

To protect the privacy of your landing page visitors, use the default web banner to collect consent for tracking. If needed, you can track activity without collecting consent by publishing a code snippet to your landing pages. You're responsible for complying with privacy laws and regulations applicable to your business.

## Track Landing Page Activity with a Consent Banner

To protect the privacy of your landing page visitors, use the default web banner to collect consent for tracking. You can customize the web banner style in Setup, or use the default styles. Then, publish the banner to your Marketing Landing Pages site in Digital Experiences.

To track activity on a landing page that uses a custom domain, add a custom URL for that domain in Setup and define the path as `/lp`.

- From Setup, in the Quick Find box, enter *Web Tracking*, and then select **Web Tracking Setup**.
- To customize the banner, edit the default text and enter a link to your company privacy policy. Use the style fields to customize the banner's position, fonts, and colors.
- Add the banner integration to your landing pages.
  - From Setup, in the Quick Find box, enter *All Sites*, and select **All Sites** under Digital Experiences.
  - Next to Marketing Landing Pages, select **Builder**.  
Landing pages in Marketing Cloud use the Sites framework. This site operates behind the scenes. Don't add content to it.
  - Click **Settings** and select **Integrations**.

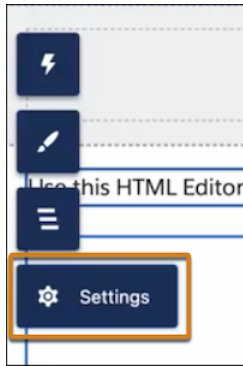
### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To customize the tracking consent banner:

- Modify All Data OR Marketing Cloud Admin permission set



- d. On the Data Cloud integration, click **Add to Site**, and enable it.
- e. On the Data Cloud Web Tracking Consent Banner integration, click **Add to Site**, and enable it.
- f. To apply the banner and styles to your landing pages, click **Publish**.

After publishing, if you change the banner text or style settings, publish the banner again in Digital Experiences. To test the banner on a real page, create and view a landing page in a web browser.

## Track Activity Without a Consent Banner

To protect the privacy of your landing page visitors, use the default web banner to collect consent for tracking. If needed, you can track activity without collecting consent by publishing a code snippet to your landing pages. You're responsible for complying with privacy laws and regulations applicable to your business.

1. From Setup, in the Quick Find box, enter *All Sites*, and then select **All Sites** under Digital Experiences.
2. Next to Marketing Landing Pages, select **Builder** from the Action column.
3. Set the Experience Builder security level to Relaxed CSP.
  - a. Click **Settings**, and then select **Security & Privacy**.
  - b. Click the Security Level dropdown menu and select **Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts**.
4. Click **Settings**, and then select **Integrations**.
5. Find the Data Cloud integration, click **Add to Site**, and enable it.  
Don't install the Web Tracking Consent Banner for Data Cloud integration.
6. Click **Settings**, and then click **Advanced**.
7. Click **Edit Head Markup**. Copy this code and paste it into the Head Markup code block:

```
<script>
document.dispatchEvent (
  new CustomEvent('experience_interaction', {
    bubbles: true,
    composed: true,
    detail: {
      name: 'set-consent',
      value: true,
    },
  },
```

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To customize the tracking consent banner:

- Modify All Data OR Marketing Cloud Admin permission set

```

    ))
  );
</script>

```

8. Save your work.
9. To begin tracking activity, click **Publish**.

To verify that the tracking connector and the data streams are set up, go to Data Cloud and review the Website Engagement object in Data Explorer. It can take up to 15 minutes for activity data to appear.

## Track Activity on External Sites

Track visitor activities on web pages hosted outside of Marketing Cloud, such as your company website. To protect the privacy of your site visitors, use the default consent banner to collect consent to track. You're responsible for complying with privacy laws and regulations applicable to your business.

1. From Setup, in the Quick Find box, enter *Web Tracking*, and then select **Web Tracking Setup**.
2. (Optional) To track with consent, customize the consent banner.
  - a. Keep or change the default banner text, and enter a link to your company privacy policy.
  - b. Customize the banner's position, fonts, and colors.
  - c. Save your work.
3. Install the Web Tracking data kit using the Admins Only option.
4. Create your website connector, and deploy data streams.
  - a. From the App Launcher, find and select **Data Cloud**.
  - b. Select **Data Streams**, and then click **New**.
  - c. Click **Installed Data Kits & Packages**, select all bundles, and click **Next**.
  - d. Click **New Connector** and enter a name for your connector, such as My Company Website. For the Connector Type, select **Website**.
  - e. Save your work, and then click **Next**.
  - f. Review your data stream fields, click **Next**, and then click **Deploy**.
5. From Setup, in the Quick Find box, enter *Web Tracking*, and then select **Web Tracking Setup**.
6. In the External Tracking Code section, copy the sitemap code. To track without collecting consent, from the Consent Option dropdown menu, select **Track without Consent**.
7. Add the external tracking code to the site map.
  - a. From Data Cloud Setup, in the Quick Find box, enter *Websites & Mobile Apps*, and then select **Websites & Mobile Apps**.
  - b. Select the website connector that you created.
  - c. In the Sitemap section, click **Upload Sitemap**, paste in the sitemap code, and save your work.
8. In the Integration Guide section, copy the Content Delivery Network Script. Work with your developer to add the script to the source code for your website.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS


To customize the tracking consent banner:

- Modify All Data OR Marketing Cloud Admin permission set

To verify that the tracking is set up correctly, review your website connector in Data Cloud Setup and confirm that the status is In Use.

## Configure Required Email Settings

To send emails with Marketing Cloud, you must verify at least one sender email address, provide a physical address to include in your email, and configure DKIM (DomainKeys Identified Mail) authentication.

 **Note:** We recommend using a subdomain of your root domain for marketing sends. This best practice improves the deliverability of your sends and protects the reputation of your domain. Make sure that your subdomain has an inbox available to receive the authentication verification email for the subdomain.

### 1. Verify an email address for the From field.

Verified sender email addresses are listed in the From field selector of an email campaign. Marketers can select the email address that they want to use for each email that they create.

- a. From Setup, in the Quick Find box, enter *Address*, and then select **Organization-Wide Addresses**.
- b. Click **Add**.
- c. Enter the email address and display name to use for email messages.
- d. To let marketers select the email address when creating emails, select the User Selection purpose.
- e. Add the System Administrator and Standard User profiles.
- f. To further control who can select the email address when creating emails, add permission sets.

### 2. Add or update the physical address inserted by the Physical Address merge tag.

This information helps you maintain regulatory compliance for marketing and transactional emails.

- a. From Setup, in the Quick Find box, enter *Company*, and then select **Company Information**.
- b. In the Organization Detail section, review or edit the Address details.
- c. Save your changes.

### 3. Work with your IT administrator to [configure DKIM settings](#) that add a recognized digital signature to your emails and can improve your deliverability.

#### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

#### USER PERMISSIONS

To modify organization-wide addresses:

- Modify All Data

OR

Marketing Cloud Admin permission set

## Set Up SMS Messages in Marketing Cloud

When you have the SMS messaging add-on, you can create and send SMS messages from Marketing Cloud. Before you can start sending, your business must request and register one or more codes. Short codes and long codes are the numbers associated with incoming and outgoing messages. The registration process can take several weeks, so make sure to plan ahead.

These requests include all the information you need to create the necessary opt-in, opt-out, and help keywords and meet legal requirements.

### Long Codes

To set up an SMS channel requires requesting the code to send your SMS messages, including any brands or campaigns used as part of your sends. You can request a 10-digit long code in the United States.

10-digit long codes require an associated brand and campaign in order to send messages. You can't port an existing 10-digit long code. To use a 10-digit long code in the United States, complete three requests.

- [Brand Request](#)
- [Campaign Request](#)
- [Code Request](#)

### Short Codes

It's possible to request a new US or Canadian short code or port an existing short code into your account. US and Canadian short codes don't require associated brands or campaigns.

You can register short codes with a [Salesforce Services agreement](#) or a [Mobile Approved Partner](#).

## Recommended Setup for Marketing Cloud

In addition to the required settings, setup includes recommended tasks to customize Marketing Cloud to meet the needs of your business.

### [Comply with Privacy Regulations](#)

Stay in compliance with privacy and consent regulations that apply to your business with Marketing Cloud consent management tools. Use the default marketing communication subscription to collect and track consent data, or create your own custom subscriptions. A built-in email preference page makes it easy for email subscribers to manage their own communication preferences.

### [Score People Based on Engagement and Fit in Marketing Cloud](#)

Score leads and contacts based on how engaged they are with your marketing efforts and how closely they resemble your ideal customer. You can customize the default scoring rules and decide how engagement and fit scores factor into the overall marketing score for a lead or contact. Use the engagement, fit, and overall marketing scores to build segments and create targeted content.

#### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition and the Salesforce Message Credits - SMS add-on

#### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition and the Salesforce Message Credits - SMS add-on



### [Page Customization in Marketing Cloud](#)

To help marketers find related information on frequently used pages, add components to Lightning record pages. A Salesforce or marketing admin can access the Lightning App Builder from the Setup menu on any record page or from the Object Manager.

### [Activate Einstein Features in Marketing Cloud](#)

Marketing Cloud includes features that use generative AI and predictive AI to save time and improve your KPIs. When you use Einstein, the security of your business and customer data is protected by the Einstein Trust Layer. Choose which Einstein features can help your business. These features aren't dependent on each other, so you can enable them separately.

## Comply with Privacy Regulations

Stay in compliance with privacy and consent regulations that apply to your business with Marketing Cloud consent management tools. Use the default marketing communication subscription to collect and track consent data, or create your own custom subscriptions. A built-in email preference page makes it easy for email subscribers to manage their own communication preferences.

### [Understanding Consent Concepts in Marketing Cloud](#)

Review the tools and concepts in Marketing Cloud that can help you collect and store consent data. You can collect consent for multiple engagement channels with communication subscriptions. Email is included by default and SMS is available as a paid add-on.

### [Create a Communication Subscription in Marketing Cloud](#)

Create a communication subscription for each category of marketing content that you send, such as product updates. For each subscription that you create, add marketing channels, such as email and SMS. Subscribers must give consent to receive promotional messages from each channel type.

### [Edit the Email Preference Page in Marketing Cloud](#)

Marketing Cloud comes with a default email preference page that's visible to subscribers when they click the Preference Manager link in an email. The default marketing communication subscription is included on the page, but you can add or remove subscriptions as needed. The preference page is customized per recipient and isn't available online via a URL.

### [Import Consent Data to Marketing Cloud](#)

If you collect consent data outside of Marketing Cloud, import it as a CSV. Each import corresponds to a single marketing channel, communication subscription, and consent status.

### [Formatting Marketing Consent Import Files](#)

Before you import consent data into Marketing Cloud, ensure that your import file is saved as a CSV and that the columns and values are formatted correctly.

## Understanding Consent Concepts in Marketing Cloud

Review the tools and concepts in Marketing Cloud that can help you collect and store consent data. You can collect consent for multiple engagement channels with communication subscriptions. Email is included by default and SMS is available as a paid add-on.

### Channel Type

A channel type is a specific marketing channel, such as email or SMS. Each communication subscription includes at least one channel type. When someone subscribes to marketing messages, they must give consent for each channel type. For example, someone could opt in to receive SMS text messages about annual sales, but not subscribe to receive those emails.

#### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

## Communication Subscription

A communication subscription is the kind of marketing content someone signs up to receive, such as product updates. Subscriptions can store consent for one or more marketing channels, such as email. You have access to an editable default marketing communication subscription. You can create additional communication subscriptions as needed.

## Consent Check

A consent check requires you to select a communication subscription when you send a message and ensures that each recipient is opted in before sending to them. Consent is required when you send a promotional email and any type of SMS message. Consent checks for transactional emails are disabled by default.

Marketing admins can edit consent check settings in Salesforce Setup.

## Contact Point

A contact point is the contact information required to consent to a marketing subscription and channel, such as an email address or phone number. A Unified Individual can be associated with multiple contact points. For example, someone could have two different phone numbers on their Unified Individual record. When you send a message that requires a consent check, the consent object is reviewed for the contact points for each Unified Individual in your segment. Only opted-in contact points associated with the Unified Individual receive the message.

## Email Preference Page

An email preference page is where subscribers can manage their own communication preferences when they click the Preference Center link in an email. After they click the Preference Center link, they can select which communication subscriptions they want to receive emails for. For example, someone can opt into product update emails and also opt in to your weekly newsletter.

## Unified Individual

A Unified Individual record consolidates multiple lead or contact records that appear to be the same individual based on identity resolution rules that you set. These rules are how a contact point, such as a phone number, is associated with a Unified Individual. Consent is tied to the contact point value, as opposed to the Unified Individual record itself.

## Consent Objects

We recommend managing consent objects, records, and preference pages from the Consent tab. However, if your org requires more customization, you can also manage consent object records and Data Cloud preference pages directly in Preference Manager. There are four objects that come together to store consent data:

- Communication Subscription
- Engagement Channel Type
- Communication Subscription Channel Type
- Communication Subscription Consent

## Create a Communication Subscription in Marketing Cloud

Create a communication subscription for each category of marketing content that you send, such as product updates. For each subscription that you create, add marketing channels, such as email and SMS. Subscribers must give consent to receive promotional messages from each channel type.

1. From the Consent page, select **Preference Pages and Subscriptions**, and then click **New Subscription**.
2. Enter a name for the subscription, such as Product Updates.
3. Select at least one channel.
4. If you selected SMS as a channel, select at least one sender code.
5. Save your work.

After you save, you can import consent data to the communication subscription and send messages to subscribers. You can also add email subscriptions to the email preference page.

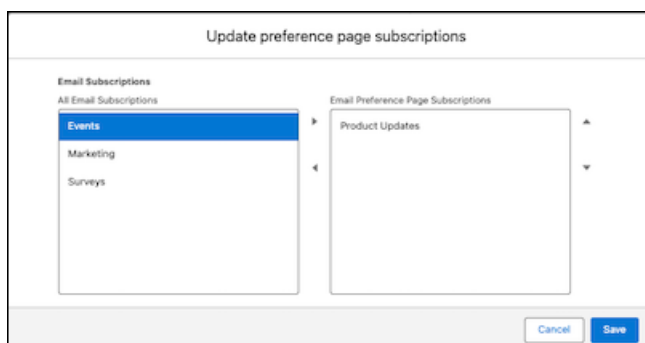
## Edit the Email Preference Page in Marketing Cloud

Marketing Cloud comes with a default email preference page that's visible to subscribers when they click the Preference Manager link in an email. The default marketing communication subscription is included on the page, but you can add or remove subscriptions as needed. The preference page is customized per recipient and isn't available online via a URL.

You can create a custom preference page in Preference Manager. First, create a [consent template with Data Cloud](#). Then, use the template to [create a preference form](#). The Preference Manager merge field doesn't work with custom preference pages.

When you save changes to the email preference page, it's immediately published and visible to your subscribers.

1. From the Consent page, select **Preference Pages and Subscriptions**.
2. For the email preference page, click **Edit Form**.
3. Select a communication subscription and use the arrows to move that subscription on or off the preference page.



4. Review your changes and then save your work.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To create communication subscriptions:

- Marketing Cloud Manager
- OR
- Marketing Cloud Admin permission set

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To edit the preference page:

- Marketing Cloud Manager
- OR
- Marketing Cloud Admin permission set


After you save, the changes are published to your preference page and subscribers can view the updated page when they click the Preference Manager link in an email. To review the live preference page, click **View Page**.

## Import Consent Data to Marketing Cloud

If you collect consent data outside of Marketing Cloud, import it as a CSV. Each import corresponds to a single marketing channel, communication subscription, and consent status.

Before you import consent data, make sure the contact points exist in Marketing Cloud. A consent import can update consent information for existing contact points, but it can't create new leads or contacts or update other fields.

1. From the Consent page, select **Consent Imports**, and then click **Import**.
2. Select a channel and a communication subscription.
3. Select a consent status to apply to all of the items in your import, and then click **Next**.
4. Upload your CSV, and then click **Next**.
5. On the preview step, review the sample fields from your file.
6. To complete your import, click **Import**.

 **Example:** Lyn wants to import a list of consent data for the communication subscription Product Updates. She has data for both SMS and email. To import all of her consent data, Lyn creates four import files:

- One for people who opted into emails
- One for people who opted out of emails
- One for people who opted into SMS messages
- One for people who opted out of SMS messages

After an import is complete, we send a notification email to the user who imported the file. It can still take some additional time to sync updated consent statuses to Data Cloud.

## Formatting Marketing Consent Import Files

Before you import consent data into Marketing Cloud, ensure that your import file is saved as a CSV and that the columns and values are formatted correctly.

### General Guidelines

- Each file you import corresponds to one communication subscription, one channel, and one consent status. For example, complete one import for people who opted into your weekly email newsletter subscription and another import for people who opted out of that subscription.
- Each import file must include a contact point value and the date of consent. A contact point value is either an email address or a phone number.
- Consent is tied to the contact point. A contact point is associated with a Unified Individual based on the identity resolution ruleset in your org.
- Consent imports update the status and date of consent for each contact point in the import file. To create or update leads or contacts, import from the Leads or Contacts tab.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To create a consent import:

- Marketing Cloud Admin
- OR
- Marketing Cloud Manager permission set

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

## Formatting the Date of Consent

When you import consent data, the system maps the data in your import file to the correct DMOs and converts timestamps based on time zone. To ensure that the system maps the date that you captured consent correctly, you must format each date entry as a DateTime datatype.

`yyyy-MM-ddTHH:mm:ss.SSSZ`

This table breaks down the format for the DateTime datatype.

Letter Code	Date or Time Component	Example
yyyy-MM-dd	Date in year-month-day format	2023-05-01
T	Literal separator for the date and the timestamp	T
HH:mm:ss:SSS	Timestamp in hour-minute-second-millisecond and format based on a 24-hour clock	14:30:00:000
Z	Represents UTC offset timezone where Z defaults to -800	Z OR -800

## Email File Guidelines

When formatting a CSV to import email consent data, keep these guidelines in mind.

- The file must include a column for email addresses and a separate column for recording the date of consent.
- Each email must be a valid and complete email address. For example,

```
lyn@ursasolar.com
```

- Emails can't include special characters.

## SMS File Guidelines

When formatting a CSV to import consent data for SMS messages, keep these guidelines in mind.

- The file must include a column for phone numbers and a separate column for recording the date of consent.
- For each entry, you must include a country code and the complete phone number. Phone numbers are validated based on [ITU E.164 standards](#). For example, a United States phone number with the country code looks like this:

```
+1-555-555-5555
```

- Spaces, dashes, underscores, and parentheses are automatically removed from phone numbers.
- Phone numbers can't include letters or special characters.

## Score People Based on Engagement and Fit in Marketing Cloud

Score leads and contacts based on how engaged they are with your marketing efforts and how closely they resemble your ideal customer. You can customize the default scoring rules and decide how engagement and fit scores factor into the overall marketing score for a lead or contact. Use the engagement, fit, and overall marketing scores to build segments and create targeted content.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### Add a Scoring Component to a Record Page

An admin can add the Data Cloud Profile Insights component to lead and contact record pages in the Lightning App Builder. Add the component for each score that you want to display: Overall Marketing Score, Marketing Engagement Score, and Marketing Fit Score. See [Page Customization in Marketing Cloud](#).

### Share Scores with Your Sales Team

After you make scoring components available, let your sales team know. Sales teams can use lead scores to help decide which leads are the most likely to convert and which have the highest potential value.

### Use Scores to Create a Segment

Target audiences more precisely by including scores in your marketing segments. For example, create a segment of people you know are likely to engage with your content, and target them with specific content. You can also use scores to target people who aren't engaged but are a good fit for your business. Send them content to encourage engagement, such as a promo code or special event invite. See [Target Audience with Marketing Cloud](#).

#### [Considerations for People Scoring in Marketing Cloud](#)

When working with scoring in Marketing Cloud, keep these considerations in mind.

#### [Available Attributes for Engagement Scoring Rules](#)

When you configure scoring rules, you can use data from the attributes available for each of the engagement objects: Email Engagement, Message Engagement, and Website Engagement. Use this reference to supply the correct value for standard attributes commonly used in scoring.

#### [Configure Scoring Rules in Marketing Cloud](#)

To begin scoring leads and contacts, select a unified individual object to score on. Then, customize scoring rules for engagement and fit. You can use the default scoring rules or edit them. You can also add or delete rules.

## Considerations for People Scoring in Marketing Cloud

When working with scoring in Marketing Cloud, keep these considerations in mind.

- Before you publish scoring rules for the first time, you can edit the rules and save them as drafts. After you publish your rules for the first time, you must publish them again to save any further changes.
- After you publish scoring rules, records are scored retroactively on any relevant data stored in Data Cloud.
- If you change the scoring object, it can take some time to process your scoring rules and apply them to records related to the new object.
- When you customize or add a rule, enter the value for fields exactly and use the correct capitalization style. For example, to specify an unsubscribe from an email, you must enter "UNSUBSCRIBE".

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

- You can have up to 30 engagement rules and 30 fit rules.
- Each person's engagement and fit scores are a simple sum of points. However, the overall marketing score is normalized to provide a number between 0 and 100.

## Available Attributes for Engagement Scoring Rules

When you configure scoring rules, you can use data from the attributes available for each of the engagement objects: Email Engagement, Message Engagement, and Website Engagement. Use this reference to supply the correct value for standard attributes commonly used in scoring.

The values you specify must be exact and are case-sensitive. Many attribute values are unique to your org or are variable depending on the lead or contact. For example, SMS short codes or a person's email address. To determine the correct values for those types of attributes, review your data model objects in Data Explorer.

### EDITIONS


Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Object	Attribute	Values
Email Engagement	Engagement Channel Action	<ul style="list-style-type: none"> <li>• CLICK</li> <li>• UNSUBSCRIBE</li> </ul>
Website Engagement	Engagement Channel Action	<ul style="list-style-type: none"> <li>• form-submit</li> <li>• anchor-click</li> <li>• button-click</li> <li>• search</li> </ul>
Message Engagement	Engagement Channel Action	<ul style="list-style-type: none"> <li>• CLICK</li> <li>• SUBSCRIBE</li> <li>• UNSUBSCRIBE</li> </ul>

## Configure Scoring Rules in Marketing Cloud

To begin scoring leads and contacts, select a unified individual object to score on. Then, customize scoring rules for engagement and fit. You can use the default scoring rules or edit them. You can also add or delete rules.

Before you publish scoring rules for the first time, you can edit the rules and save them as drafts. After you publish your rules for the first time, you must publish them again to save any further changes.

1. From Setup, in the Quick Find box, enter *scoring*, and select **Scoring Rules**.
2. In the Unified Individual Object section, click **Select Object**, select an object to score on, and save your work.  
Records related to the object that you select receive scores.
3. In the Overall Score section, decide how to weigh engagement and fit into an aggregate marketing score for each person.
4. Review the default scoring rules. To edit a rule, click the  icon, or create an engagement or fit rule.
5. Configure your rule using the dropdown menus, and decide how many points to adjust the score by when someone meets the rule conditions.  
Attributes are fields, and values are the data that you're interested in. For example, Engagement Channel Action is an attribute, and CLICK is a value.
6. Click **Add Rule**.

After you publish your scoring rules, they're immediately applied to records related to the unified individual object that you selected. Next, add scoring components to lead and contact pages, and use scores to build segments.

## Page Customization in Marketing Cloud

To help marketers find related information on frequently used pages, add components to Lightning record pages. A Salesforce or marketing admin can access the Lightning App Builder from the Setup menu on any record page or from the Object Manager.

For more information, see [Create and Configure Lightning Experience Record Pages](#).

Lightning Component	Description	Available on...
Marketing Consent Status	A list of subscriptions and consent values	Lead, Contact, and Person Account records
Data Cloud Profile Engagement	A numerical score that indicates someone's level of engagement	Lead and Contact records
Data Cloud Profile Insights	A table of engagement metrics from automations and messaging channels	Lead and Contact records

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### USER PERMISSIONS

To manage and publish scoring rules:

- Configure Marketing Cloud Scoring Rules

AND

One of these permission sets:

- Data Cloud Admin
- Data Cloud for Marketing Admin
- Data Cloud Aware Specialist

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition



## Data Cloud Profile Engagement Settings

To configure the engagement component, select these values for each field.

- Match On: Lead ID or Contact ID (or a custom field that stores the Unified Individual ID)
- Data Space: default
- Unified Individual DMO: Unified Individual
- Unified Individual Link: Unified Link Individual

Lastly, select one or more Engagement DMOs. Flow Runs are related to campaigns, and Messaging Engagement refers to SMS messaging.

## Data Cloud Profile Insights Settings

To configure this scoring component, select these values for each field.

- Match On: Lead ID or Contact ID (or a custom field that stores the Unified Individual ID)
- Data Space: default
- Unified Individual DMO: Unified Individual
- Unified Individual Link: Unified Link Individual
- Calculated Insight: Marketing Engagement Score
- Measure: Engagement\_\_Score\_\_c

## Activate Einstein Features in Marketing Cloud

Marketing Cloud includes features that use generative AI and predictive AI to save time and improve your KPIs. When you use Einstein, the security of your business and customer data is protected by the Einstein Trust Layer. Choose which Einstein features can help your business. These features aren't dependent on each other, so you can enable them separately.

### Get Started Quickly with Campaign Briefs

To jump-start a new marketing effort, Einstein can draft a campaign brief and suggest a relevant segment. To use this Einstein Co-Create feature in Marketing Cloud, you enable settings for generative AI and in Data Cloud.

1. [Enable Einstein generative AI](#).
2. To turn on Einstein Segment Creation, search *Features*, select **Feature Manager**, and enable the feature.
3. To turn on Einstein campaign briefs, search *Create*, select **Co-create with Einstein**, and click **Activate**.

After you turn on these features, they're immediately available.

### Optimize Email Send Times

Einstein Send Time Optimization (STO) is a predictive AI feature that optimizes your email sends based on historical data that indicates when individuals are most likely to open them. To use this feature, your org must opt in to the Global Data Model for Einstein.

1. Verify that you have an identity resolution ruleset that uses Individual as the primary data model object.  
This ruleset must be one of the first two identity resolution rulesets that you create for Marketing Cloud.
2. From Setup, in the Quick Find box, enter *Send Time*, and select **Einstein Send Time Optimization (STO) with Global Models**.

#### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

#### USER PERMISSIONS

To enable Einstein features:

- Marketing Cloud Admin permission set

3. Review the global model information, and click **Activate**.

STO needs some time to gather data and build a model that's specific to your data. To check on the STO model status, return to the setup page. If you deactivate this feature, new messages can't use it, but existing email sends still include optimized send times.

For more information about data, review [the STO Model Card](#) on page 34.

## Filter Non-Human Clicks from Your Report

Einstein Metrics Guard uses predictive AI to filter bot activity from your org's engagement metrics. It removes most clicks and opens generated by security scanner bots without filtering out legitimate visitor activity.

1. From Setup, in the Quick Find box, enter *Messaging*.
2. Under Email, select **Email Feature Settings**.
3. Turn on the feature.

If you deactivate this feature, your engagement metrics are more likely to include bot activity.

## Create and Publish a Brand in Marketing Cloud Growth

Each brand that you create is stored in your content workspace and is available for marketers to select when they create content. If you save your brand in a workspace that's shared with another workspace, you can apply the brand to an email or landing page in the shared workspace.

1. From your marketing workspace, click **Add**.
2. Select **Content > Brand**, and then click **Create**.
3. Give your brand a title and specify your company's colors and other styles. Optionally, further customize the colors for your button styles.  
As you adjust the brand values, your style changes appear in the preview panel. To switch between desktop and mobile views, use the dropdown menu in the navigation bar.
4. Publish the brand.
  - Open the brand's page, and click **Publish**.
  - In your content workspace, find the brand and click **Publish**.
  - When creating content, assign the brand to an email or landing page, and publish the content.

The screenshot shows the 'Email' configuration page in Marketing Cloud. At the top, there's a header 'Email' and a sub-header 'Add an email that you can use in marketing campaigns.' Below this are two tabs: 'Settings' and 'Style'. The 'Settings' tab is active. A 'Brand' field is highlighted with an orange box, containing a 'Select Brand' button. Below it are several required fields: 'Title' (with value 'Capricorn Coffee Springtime Sale'), 'Description' (with value 'Email for our springtime coffee special'), 'Message Purpose' (a dropdown menu set to 'Promotional'), and 'Subject Line' (with value 'Sail into spring with Capricorn Coffee'). Each of these fields has an 'Add Merge Field' button below it. At the bottom, there is a 'Preheader' field (with value 'New flavors and old favorites to welcome each spring day') and another 'Add Merge Field' button.

If necessary, a marketer can customize text styles, colors, or other content elements for an individual email or landing page. Those style changes apply only to that content.

## Increase Productivity with AI

In Marketing Cloud, predictive and generative AI tools from Einstein help you improve work outcomes and day-to-day productivity.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Feature	Description	Accessible from...
Einstein Co-Create	A generative AI feature that drafts marketing materials based on conversational prompts provided by a marketer. Must be enabled in Salesforce Setup.	<ul style="list-style-type: none"> <li>Campaigns</li> <li>Email subject lines, preheaders, and body copy</li> <li>Segments</li> </ul>
Einstein Metrics Guard	A predictive AI feature that filters out opens and clicks from standard engagement reports. Must be enabled in Salesforce Setup. <a href="#">Acceptable Use for Einstein Metrics Guard</a> on page 32	Emails
Einstein Send Time Optimization	A predictive AI feature that identifies the ideal time to send an email based on individual recipients' email engagement history, and then delivers emails at that time. Must be	Emails

Feature	Description	Accessible from...
	enabled in Salesforce Setup. <a href="#">Acceptable Use for Einstein Send Time Optimization</a> on page 34	

#### [Model Card: Einstein Metrics Guard](#)

In Marketing Cloud, Einstein Metrics Guard analyzes how open events are calculated and the likelihood that each open event is real.

#### [Model Card: Einstein Send Time Optimization](#)

In Marketing Cloud, Einstein Send Time Optimization analyzes the optimal time to send a message to an individual to maximize the probability of the individual engaging with the message.

## Model Card: Einstein Metrics Guard

In Marketing Cloud, Einstein Metrics Guard analyzes how open events are calculated and the likelihood that each open event is real.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### Model Details

The Einstein Metrics Guard model analyzes message open and click likelihood using training algorithms, parameters, fairness constraints, features, and other applied approaches.

#### Person or Organization

Salesforce Marketing Cloud Growth Edition

#### Model Data and Version

- February 2024
- Minor changes can occur throughout the release.
- Major changes are communicated via release notes.

#### Model Types

Time-series analysis, predictive modeling

#### General Information

For each email open and click event, Einstein Metrics Guard assigns a confidence score that assesses human-initiated real opens or clicks. The score ranges from 0% to 100%. Higher scores represent higher confidence that the open or click is real. Lower scores represent a higher chance that the open or click event is machine-generated.

The model analyzes an individual's historical engagement events and patterns to predict the chance that an open or click is real. The model monitors behavior changes using event association and attribution. The most recent behavior changes and engagement patterns are weighted more heavily when building the predictions.

Compared to a standard filtering-based approach, Einstein Metrics Guard reduces the risk of false positive and false negative results and minimizes information loss.

### Intended Use

The Einstein Metrics Guard model is intended for these use cases. Anything else is out of scope and not recommended.

- The model provides a layer of information that helps Einstein calculate how trustworthy each email open is. Einstein Metrics Guard is in place in response to mail privacy protection implemented by some email client providers. Einstein can build more accurate models and provide better recommendations.
- Events that score poorly aren't included in marketing statistics, and aren't used to trigger follow-up actions.

## Relevant Factors

These factors are associated with the Einstein Metrics Guard model.

### Model Input

The engagement history includes these values.

- Email sends, bounces, and engagement events including opens, clicks, unsubscribes, spam complaints, and associated timestamps
- Data and metadata about customer sending patterns, including how campaigns are executed

The engagement history that Einstein Metrics Guard analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic data
- Specific content in an email template or rendered email body

### Model Output

To measure the likelihood that an open is real, the model produces a probabilistic metric score for each open event. The messaging service uses the score to filter out low-scoring activity.

### Environment

The model is trained and deployed in the Salesforce Marketing Cloud environment.

## Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the model quality. Performance measures include data such as model mean absolute error score.


## Training Data

Einstein Metrics Guard is trained using a global model of in-house data and outsourced data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. Each version of the model uses the global model data with optimized sample weights customized for each customer.

## Ethical Considerations

Review the ethical factors associated with the Einstein Metrics Guard model in Marketing Cloud. To avoid bias and other ethical risks, the model doesn't include demographic data.

As you interpret your data, be aware of making assumptions based on the scores generated. Scenarios with potential adverse outcomes can occur in certain circumstances.

 **Example:** The model predicts low engagement so you choose not to send a marketing communication to a set of customers. If the prediction was erroneous, there could be a negative impact to excluding some of those customers from access to benefits or opportunities.

## Model Card: Einstein Send Time Optimization

In Marketing Cloud, Einstein Send Time Optimization analyzes the optimal time to send a message to an individual to maximize the probability of the individual engaging with the message.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### Model Details

The Marketing Cloud Einstein Send Time Optimization model maximizes customer engagement using optimal send times for email content using these training algorithms, parameters, fairness constraints, features, and other applied approaches.

#### Person or Organization

Salesforce Marketing Cloud Growth Edition

#### Model Data and Version

- February 2024
- Minor changes can occur throughout the release
- Major changes are communicated via release notes.

#### Model Type

Recommendation and prediction, latent factor matrix factorization

#### Supported Channels

Currently only email is supported.

#### General Information

Einstein Send Time Optimization is the Salesforce solution to maximize the engagement rate of email sends based on the send time.

The model chooses the optimal time to send an email to an individual that maximizes the probability of the individual engaging with the message. Because customer sending patterns vary greatly, we developed parameter sets that are suited for different patterns. During training, a parameter selector determines the chosen set for a particular business.

Einstein Send Time Optimization uses global model data to train the model. Contributed data is anonymized and aggregated at both the business unit and contact levels before being used in local orgs. In this way, the global model can be used without sharing personal data, such as email addresses, between customer business units. When you enable Einstein Send Time Optimization, you automatically are opted-in to use global models.

Einstein Send Time Optimization analyzes the past 90 days of email engagement history.

### Intended Use

The primary intended use for the Einstein Send Time Optimization model is for marketing professionals to increase effectiveness in their email marketing campaigns and maximize customer engagement. Anything else is out of scope and not recommended. For example, reducing overall send latency for reservation booking emails isn't an intended use case.

### Relevant Factors

These factors are associated with the Einstein Send Time Optimization model.

#### Model Input

The engagement history includes these values.

- Email sends, bounces, and engagement events including opens, clicks, unsubscribes, spam complaints, and associated timestamps

- Data and metadata about customer sending patterns, including how campaigns are executed

The engagement history that Einstein Send Time Optimization analyzes excludes these factors.

- Data purchased or collected from third parties
- Demographic data
- Specific content in an email template or rendered email body
- Transactional emails, such as purchase confirmations, password resets, and others

Environment

The model is trained and deployed in the Salesforce Marketing Cloud environment.

## Metrics

Einstein evaluates and monitors model performance metrics to ensure and improve the model quality. Customers are responsible for monitoring the model's accuracy.

Model Performance Measures

Aggregated model performance metrics are gathered to monitor, ensure, and improve the quality of the model. Model performance metrics include the spread and sparsity of input metrics and the correlation of output scores to historical observations. All metrics are aggregated and anonymized.

## Training Data

Einstein Send Time Optimization is trained using a global model of in-house data and outsourced data. Data from one Salesforce customer doesn't affect the behavior for another Salesforce customer. Each version of the model uses the global model data with optimized sample weights customized for each customer.

## Ethical Considerations

To avoid bias and other ethical risks, the Einstein STO model doesn't include demographic data.

## Refresh Cadence

Einstein Send Time Optimization scores and models for email are updated approximately weekly. The refresh cadence varies by one to several days based on a customer's individual business unit.

## Helpful References

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Reference lists and tables are available to help you learn terminology, identify available options, troubleshoot issues, and other admin tasks.

### [Allocations and Limits in Marketing Cloud](#)

Some Marketing Cloud features have limits that impact how much of something you can store or how frequently you can do certain tasks.

### [User Permissions in Marketing Cloud](#)

Marketing Cloud comes with two permission sets: Marketing Cloud Admin and Marketing Cloud Manager. Many individual permissions are available for managing access more granularly throughout the app. The permissions list can help you build a custom permission set or troubleshoot access issues.

### [Domain Settings in Marketing Cloud](#)

Depending on your business needs, you can configure one or more domains to handle different jobs. You can choose My Domain to use a Salesforce subdomain or configure your own custom domain for hosting content. You can also create a tracking domain if you plan to use SMS messaging. Configuring DKIM (DomainKeys Identified Mail) authentication for sending emails is required.

### [Authenticate a Domain for Unified Messaging](#)

Use an authenticated domain to efficiently verify all your From addresses. Before you can send email messages using Unified Messaging, authenticate your sending domain. To authenticate, make sure that you have access to the relevant DNS information. Work with your internal IT team to implement the necessary DNS configuration.

### [Fuzzy and Exact Match Methods](#)

Match rule methods determine how source data is transformed for comparison during matching. Changing the match method on a field typically changes the consolidation rate based on that field.

### [Create and Configure Lightning Experience Record Pages](#)

Use the Lightning App Builder to add, remove, or reorder components on a record page to give users a customized view for each object's records.

### [Reporting in Marketing Cloud](#)

Engagement metrics are available on people records and on the Analytics page. For the best experience, work with an admin to add scoring components to lead, contact, and person account records, or to create report collections in Analytics.

## Allocations and Limits in Marketing Cloud

Some Marketing Cloud features have limits that impact how much of something you can store or how frequently you can do certain tasks.

### Campaigns and Flows

Resource	Limit
Total active flows	500 simultaneously active flows
Total saved flows	50,000 saved flows
Versions per flow	50 versions
Einstein co-create actions of all types	20,000 actions per year

### Segments

For more information about limits that apply to segments, see [Data Cloud Limits and Guidelines](#).

#### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition



## Content and Messaging

Resource	Limit
Email send entitlements	15,000 sends per month
CMS storage	10 GB plus 2 GB per user

## Scoring and Data

Resource	Limit
Fit scoring rules	30 rules
Engagement scoring rules	30 rules

## User Permissions in Marketing Cloud

Marketing Cloud comes with two permission sets: Marketing Cloud Admin and Marketing Cloud Manager. Many individual permissions are available for managing access more granularly throughout the app. The permissions list can help you build a custom permission set or troubleshoot access issues.

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

### Permission Sets

Assign permission sets on the Permission Sets page in Salesforce Setup. These permission sets are based on a standard user profile.

Name	Description
Marketing Cloud Admin	Access to Salesforce Setup, Data Cloud Setup, and full control on campaigns, segments, and flows.
Marketing Cloud Manager	Full control to manage campaigns, segments, and campaign (non-admin) flows.

## General Marketing Permissions

These permissions are available in the App Permissions list for a permission set.

Name	Description
Access the Marketing App	Access to the Marketing app in Lightning Experience.
Allows user access segments	Access to the Segments tab in the Marketing app.
Configure Marketing Cloud Scoring Rules	Review and publish lead scoring rules.
Manage Campaigns	Create, edit, and delete permissions on campaigns.

## CMS Content Roles

These roles are assigned on the Administration pages in sites and workspaces.

Name	Description
Viewer	View content published on the Marketing Landing Pages site.
Content Admin	Full access to all content in a workspace, contributor, and sharing management for a workspace.
Content Manager	Full access to all content in a workspace.
Content Author	Create, edit, and view content in a workspace.

## Consent Permissions in Marketing Cloud

These permissions are available in the System Permissions list for a permission set.

Name	Description
Edit Marketing Consent Settings	Edit the consent settings for Marketing Cloud in Salesforce Setup.
Manage Consent Banner Setup	Edit styles for the consent banner used on marketing landing pages.
Manage Preference Manager	Create, edit, and delete Preference Manager configurations.

## Content and Publishing Permissions

These permissions are available in the App Permissions list for a permission set.

Name	Description
Manage Email Content	View, create, edit, and delete email content. You can also send, preview, and test your email content with this permission.
Manage Email Messaging Setup	Create, view, edit, and delete email objects in Salesforce Setup.
Manage SMS Messaging Setup	Create, view, edit, and delete SMS objects in Salesforce Setup.
Query CMS Email Content	Prepare CMS email content for sending from campaigns and Flow Builder. Email sending also requires Create on Flow object.
Send Test Email	Send test emails from the preview and test operation via Messaging Service.
Send Test SMS	Send test SMS messages for the preview and test operation via Messaging Service.
Send Unified Messaging Email	Send email via Messaging Service.
Send Unified Messaging SMS	Send SMS via Messaging Service.
View Email Messaging Setup	View email objects in Salesforce Setup.

Name	Description
View SMS Messaging Setup	View SMS objects in Salesforce Setup.

## Flow Permissions in Marketing Cloud

These permissions are available in the App Permissions list for a permission set.

Name	Description
Activate or Deactivate Flows	Allow users without the Manage Flow user permission to activate and deactivate flows in the Automation or Marketing apps.
Add Assignment Element to Flows	Allow users without the Manage Flow user permission to add the Assignment element to flows in the Automation or Marketing apps.
Add Collection Filter Element to Flows	Allow users without the Manage Flow user permission to add the Collection Filter element to flows in the Automation or Marketing apps.
Add Collection Sort Element to Flows	Allow users without the Manage Flow user permission to add the Collection Sort element to flows in the Automation or Marketing apps.
Add Create Records Element to Flows	Allow users without the Manage Flow user permission to add the Create Records element to flows in the Automation or Marketing apps.
Add Decision Element to Flows	Allow users without the Manage Flow user permission to add the Decision element to flows in the Automation or Marketing apps.
Add Delete Records Element to Flows	Allow users without the Manage Flow user permission to add the Delete Records element to flows in the Automation or Marketing apps.
Add Get Records Element to Flows	Allow users without the Manage Flow user permission to add the Get Records element to flows in the Automation or Marketing apps.
Add Loop Element to Flows	Allow users without the Manage Flow user permission to add the Loop element to flows in the Automation or Marketing apps.
Add Subflow Element to Flows	Allow users without the Manage Flow user permission to add the Subflow element to flows in the Automation or Marketing apps.
Add Update Records Element to Flows	Allow users without the Manage Flow user permission to add the Update Records element to flows in the Automation or Marketing apps.
Add Wait Elements to Non-Setup Flows	Allow users without the Manage Flow user permission to add the Wait for Amount of Time element, the Wait Until Date element, and the Wait for Conditions element to flows in the Automation or Marketing apps.

Name	Description
Create or Edit Flows	Allow users without the Manage Flow user permission to create and edit flows in the Automation or Marketing apps.
Create or Modify Form-Triggered Flows	Allow users without the Manage Flow user permission to create, edit, and delete form-triggered flows in the Automation or Marketing apps.
Create or Modify Segment-Triggered Flows	Allow users without the Manage Flow user permission to create, edit, and delete segment-triggered flows in the Automation or Marketing apps.
View All Non-Admin Flows	Allow users without the Manage Flow or View All Data user permissions to see all flows with associated flow records in the Automation or Marketing apps, regardless of sharing settings.
View Flows	Allow users without the Manage Flow user permission to view flows shared with them in the Automation or Marketing apps.

## Objects Access

These permissions are available in the System Permissions list for a permission set.

Name	Related Cloud or Feature
Calculated Insight Fields	Data Cloud
Calculated Insight Object	Data Cloud
Calculated Insight Object Definitions	Data Cloud
Campaigns	Marketing Cloud, Sales Cloud
Communication Subscription Channel Types	Privacy Center, consent settings
Communication Subscription	Privacy Center, consent settings
Data Connections	Data Cloud
Data Connector Credentials	Data Cloud
Data Connectors for GCS	Data Cloud
Data Connectors for Interaction Studio	Data Cloud
Data Connectors for Marketing Cloud	Data Cloud
Data Connectors for S3	Data Cloud
Data Connectors for Sftp	Data Cloud
Data Connectors for Upload	Data Cloud
Data Lake Fields	Data Cloud
Data Lake Object Definitions	Data Cloud

<b>Name</b>	<b>Related Cloud or Feature</b>
Data Model Domain Capability Usage	Data Cloud
Data Model Fields	Data Cloud
Data Model Objects	Data Cloud
Data Model Relation Constraints	Data Cloud
Data Model Taxonomies	Data Cloud
Data Object Categories	Data Cloud
Data Platforms	Data Cloud
Data Source Objects	Data Cloud
Data Sources	Data Cloud
Data Source Tenants	Data Cloud
Data Space Definitions	Data Cloud
Data Spaces	Data Cloud
Data Transport Fields	Data Cloud
Data Transport Object	Data Cloud
Engagement Channel Types	Privacy Center, consent settings
External Data Connectors	Data Cloud
Field Source Target Relationships	Data Cloud
Ingestion API Data Connectors	Data Cloud
Internal Data Connectors	Data Cloud
Market Segment Definitions	Data Cloud
Mobile App Data Connectors	Data Cloud

## Domain Settings in Marketing Cloud

Depending on your business needs, you can configure one or more domains to handle different jobs. You can choose My Domain to use a Salesforce subdomain or configure your own custom domain for hosting content. You can also create a tracking domain if you plan to use SMS messaging. Configuring DKIM (DomainKeys Identified Mail) authentication for sending emails is required.

Domain Setting	Description
<a href="#">My Domain</a>	My Domain allows you to showcase your company's brand with a custom subdomain name in your Salesforce org login and application URLs.
<a href="#">Custom Domain</a>	A custom domain gives further control over URLs that are visible to your customers. When you add a custom domain in Marketing Cloud, we recommend that you serve content with the <a href="#">Salesforce Content Delivery Network (CDN)</a> . To track activity on a landing page that uses a custom domain, add a custom URL for that domain in Setup and define the path as <code>/1p</code> .
<a href="#">Authentication (DKIM)</a>	<p>DKIM is a method of email authentication that protects email recipients from messages that use spoofed email addresses. It can improve the deliverability of your emails. Because it requires you to store a unique identifier on your web domain, setting up DKIM typically requires help from your IT or web administrator.</p> <p>DKIM authentication is required to send email with Marketing Cloud.</p>
<a href="#">Tracking Domain</a>	A tracking domain monitors message opens and link clicks. The default tracking domain is owned by Salesforce, but you can also configure a domain that your organization owns.

### EDITIONS

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition and the Salesforce Message Credits - SMS add-on

## Authenticate a Domain for Unified Messaging

Use an authenticated domain to efficiently verify all your From addresses. Before you can send email messages using Unified Messaging, authenticate your sending domain. To authenticate, make sure that you have access to the relevant DNS information. Work with your internal IT team to implement the necessary DNS configuration.

Allow the DNS information to propagate before you activate your authenticated domain. Propagation can take anywhere from 24 to 48 hours to complete.

1. In Setup, in the Quick Find box, enter *Authenticated Domains*, and then select **Email Authenticated Domains**.
2. Click **Add Domain**.
3. Enter the domain that you want to use, and click **Save**.
4. Click the dropdown menu next to the domain that you added and select **Show Details**.
5. For your external DNS service, enter the CNAME records provided in Setup and save your changes.
6. In Setup, turn on your domain.

After the process is complete, your domain status is Active and is ready for use.

### EDITIONS

Available in: Lightning Experience


Unified Messaging for WhatsApp is available in **Enterprise** and **Unlimited** Editions for Marketing Cloud Engagement and Service Cloud Digital Engagement

Unified Messaging for Email and SMS is available in **Enterprise** and **Unlimited** Editions for Marketing Cloud Growth

Not supported in Government Cloud Plus

## Fuzzy and Exact Match Methods

Match rule methods determine how source data is transformed for comparison during matching. Changing the match method on a field typically changes the consolidation rate based on that field.


 **Warning:** Data is transformed for matching purposes when the Fuzzy and Exact Normalized match methods are selected. However, reformatted data is not stored in unified profiles. The format of the value stored in a unified profile is based on source data and determined by reconciliation rules.

Match methods describe the precision with which data is matched during identity resolution. The anticipated consolidation rate is lower when precision matching is required. Selecting a less precise match method typically raises the consolidation rate, but can result in undesirable matches.

Up to five match methods are available for use in creating criteria for custom match rules. The match methods available for each object and field vary. Fuzzy match methods aren't available for fields from the Account object.

- Exact
- Exact Normalized
- Fuzzy - High Precision
- Fuzzy - Medium Precision
- Fuzzy - Low Precision

You can refine custom match criteria further by allowing matches to be made between blank fields.

 **Tip:** To determine the most effective match method for your data, configure multiple rulesets with different criteria. Compare consolidation rates and decide which match method works best for your unified profiles.

## Exact Match Method

The **Exact** match method is available for all objects and fields. When this match method is used, values match regardless of case.


 **Example:** Because exact match is case-insensitive, these four source data values are an exact match:

- Maryanne
- maryanne
- MARYANNE
- MaryAnne

## Exact Normalized Match Method

The **Exact Normalized** match method is available for specific fields for the Contact Point Email, Phone, and Address objects.

When this match method is selected, source data is transformed to address issues like trailing spaces, inconsistent formatting, special characters, and more.

Object	Fields with Exact Normalized Match Method Support	Normalization Process
Individual	<ul style="list-style-type: none"> <li>• First Name</li> </ul>	<ul style="list-style-type: none"> <li>• Standardizes capitalization so matches are case-insensitive</li> </ul>
Contact Point Email	<ul style="list-style-type: none"> <li>• Email Address</li> </ul>	<ul style="list-style-type: none"> <li>• Standardizes capitalization so matches are case-insensitive</li> <li>• Removes white space from the beginning and end of email address</li> <li>• Removes non-alphanumeric characters like “” and &lt;&gt; from email address</li> </ul>
Contact Point Phone	<ul style="list-style-type: none"> <li>• Formatted E164 Phone Number</li> </ul>	<ul style="list-style-type: none"> <li>• Removes white spaces from phone number</li> <li>• Removes non-alphanumeric-characters like * and () from phone number</li> <li>• Validates phone number with <a href="#">Google's common Java, C++ and JavaScript library for parsing, formatting, and validating international phone numbers</a></li> </ul> <p> <b>Tip:</b> For data sources with phone number country codes map the Phone Country Code field in Data Streams.</p>
Contact Point Address	<ul style="list-style-type: none"> <li>• Address Line 1</li> <li>• Address Line 2</li> <li>• Address Line 3</li> <li>• State Province</li> <li>• Country</li> </ul>	<ul style="list-style-type: none"> <li>• Standardized based on country-specific rules for addresses</li> </ul>



 **Example:** These source data values are an exact normalized match:

**Table 1: Contact Point Email Object**

Source Values	Exact Normalized Email Address Field Value
<ul style="list-style-type: none"> <li>• &lt;MichelleNoris@gmail.com&gt;</li> <li>• "MichelleNoris"@gmail.com</li> <li>• michellenoris@gmail.com</li> </ul>	michellenoris@gmail.com

 **Example:** These source data values are an exact normalized match:

**Table 2: Contact Point Phone Object**

Source Values	Exact Normalized Formatted E164 Phone Number Field Value
<ul style="list-style-type: none"> <li>• +1 (650) 277-9500</li> <li>• +1 650 277-9500</li> <li>• 1 (650) 277-9500</li> </ul>	+16502779500

 **Example:** These source data values are an exact normalized match:

**Table 3: Contact Point Address Object**

Source Values	Exact Normalized Address Line 1 and Address Line 2 Field Values	Exact Normalized State Province and Country Field Values
Source 1 <ul style="list-style-type: none"> <li>• Address Line 1: 220 Laurier Avenue West</li> <li>• Address Line 2: Suite 1000</li> <li>• State Province: ON</li> <li>• Country: CA</li> </ul> Source 2 <ul style="list-style-type: none"> <li>• Address Line 1: 220 Laurier Ave W</li> <li>• Address Line 2: Ste 1000</li> <li>• State Province: Ontario</li> <li>• Country: Canada</li> </ul>	220 Laurier Ave W Ste 1000	Ontario Canada
Source 1 <ul style="list-style-type: none"> <li>• Address Line 1: 56 Abascal</li> <li>• Address Line 2: Calle de José</li> <li>• State Province: Madrid</li> </ul>	Calle De José Abascal 56	Madrid Spain

Source Values	Exact Normalized Address Line 1 and Address Line 2 Field Values	Exact Normalized State Province and Country Field Values
<ul style="list-style-type: none"> <li>Country: ES</li> </ul> Source 2 <ul style="list-style-type: none"> <li>Address Line 1: Abascal 56</li> <li>Address Line 2: Calle de José</li> <li>State Province: Madrid</li> <li>Country: Spain</li> </ul>		



**Tip:** Exact normalized matches generally lead to higher consolidation rates than exact matches. To determine the most effective match method for your data, configure multiple rulesets. Compare the consolidation rate of each ruleset and decide which works best for our data.

## Fuzzy Match Methods

The **Fuzzy** match methods are available for the Individual Object First Name Field for Latin-1 (ISO-8859-1) characters.


When any of these match methods are used, matches are based on an Artificial Intelligence (AI) model trained with data from over 150 countries, 3 billion English words, and 20 million names. The AI model is built with the Bidirectional Encoder Representations from Transformers (BERT) Language Model to match common misspellings, diacritical marks, synonyms, and more. The AI model has a 0.7 confidence threshold.


To allow more control over the granularity of matching, three levels of precision are available: high, medium, and low precision.

**Table 4: Fuzzy Matching Precision Levels**

Precision Level	Description	Matching Values
Low Precision	Matches values with loose similarities.	<ul style="list-style-type: none"> <li>Lisa, Liza</li> <li>Cathi, Cathy</li> <li>Lucia, Luc</li> </ul>
Medium Precision	Matches values with the same initials, gender variants, shuffled names, and similar surnames.	<ul style="list-style-type: none"> <li>S., Sharon</li> <li>A.M., Anthony Michael</li> <li>Cathi, Cathie</li> <li>Lilian, Lilia</li> <li>Gabriel, Gabrielle</li> <li>José Andrés, Pepe</li> <li>Joey James, James Joseph</li> </ul>
High Precision	Matches values across nicknames, punctuation, international abbreviations, international alphabet characters, and cross-cultural spellings.	<ul style="list-style-type: none"> <li>Beatriz, Beatrice</li> <li>William, Bill</li> <li>Mary-Jo, MaryJo</li> <li>Håkon, Hakon</li> </ul>

Precision Level	Description	Matching Values
		<ul style="list-style-type: none"> <li>Catherine, Katherine</li> </ul>

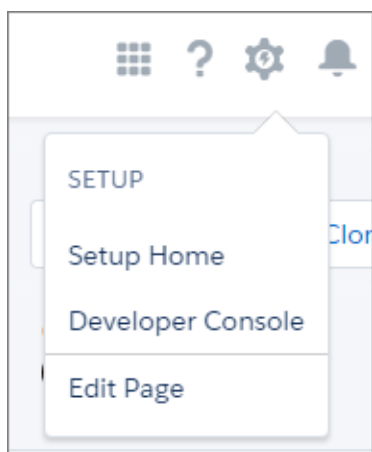
 **Note:** For non-Latin-1 characters, like Japanese, the exact match method is applied even if a fuzzy match method is selected.

 **Tip:** Fuzzy matches generally lead to higher consolidation rates than exact matches. To determine the most effective match method for your data, configure multiple rulesets with different criteria. Compare consolidation rates and decide which match method works best for your unified profiles.

## Create and Configure Lightning Experience Record Pages

Use the Lightning App Builder to add, remove, or reorder components on a record page to give users a customized view for each object's records.

1. Create a record page for Lightning Experience in one of these ways.
  - From the Setup menu on a record page, select **Edit Page**.



When you select **Edit Page** for the first time, Salesforce makes a copy of the standard page. This copy is what you edit in the Lightning App Builder. If a customized page exists and is active, selecting Edit Page opens that page to edit.

- Create a page from the Lightning App Builder list page in Setup. Enter *App Builder* in the Quick Find box, then select **Lightning App Builder**, click **New**, and step through the page creation wizard.
 

To create an empty page, select a page template. To create a page prepopulated with standard components, clone the system default page.
  - Clone an existing custom Lightning page from its detail page or from the Lightning page list in Setup.
  - Click **New Page** from the Pages list inside the Lightning App Builder.
2. In the Lightning App Builder, add, edit, or remove components to change the page's layout. Reorder components by dragging them around the canvas.
  3. In the page properties, give your customized page a unique, descriptive label.

### EDITIONS

Lightning App Builder available in: both Salesforce Classic and Lightning Experience

Lightning Home and utility bar pages available in: Lightning Experience

Lightning app and record pages available in: both the Salesforce mobile app and Lightning Experience

Email application pane pages available in: both Salesforce Classic and Lightning Experience

Available in: **Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To create and save Lightning pages in the Lightning App Builder:

- Customize Application

To get to the page properties, click **Page** from the breadcrumb at the top of the properties pane.

**4.** Save your page.

Hang on, you're not done yet! To make your customized record page available to your Lightning Experience and mobile users, you must activate it. You can activate the page from the Save dialog when you save it for the first time or later using the Activation button.

## Reporting in Marketing Cloud

Engagement metrics are available on people records and on the Analytics page. For the best experience, work with an admin to add scoring components to lead, contact, and person account records, or to create report collections in Analytics.

### EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** Edition

Reporting Type	Location	Good for...
Engagement Score	Lead and contact records	At-a-glance understanding of someone who has been engaging with your brand.
Engagement Details	Lead and contact records	Detailed understanding of someone's recent engagement activities.
Email Engagement dashboard	Analytics tab	A big-picture look at standard email marketing KPIs that you can filter by email, campaign, date range, and more.
Email Engagement reports	Analytics tab	A group of individual reports that focus on common email marketing KPIs.
SMS Engagement dashboard	Analytics tab	A big-picture look at standard SMS marketing KPIs that you can filter by email, campaign, date range, and more.
SMS Engagement report	Analytics tab	A group of individual reports that focus on common SMS marketing KPIs.
Forms Engagement dashboard	Analytics tab	A big-picture look at form KPIs that you can filter by date, public title, and more.
Forms Engagement report	Analytics tab	A group of individual reports that focus on common form KPIs.
Landing Page Engagement dashboard	Analytics tab	A big-picture look at landing page KPIs that you can filter by date, public title, and more.

Reporting Type	Location	Good for...
Landing Page Engagement report	Analytics tab	A group of individual reports that focus on common landing page KPIs.

### [Create and Edit Public Groups](#)

Create public groups to help configure your users' access to records and other features. Only administrators and delegated administrators can create and edit public groups.

### [Stay Organized with Collections](#)

Collections enable you to curate and organize your analytics in a customized way. By creating a collection, you have a personalized set of analytics that's relevant to your projects or interests. Your analytics can be drawn from different folders, and you can avoid searching different folders to access your most important analytics. In addition, collections can personalize the home page that makes it easier to find and use the information that matters most to you.

## Create and Edit Public Groups

Create public groups to help configure your users' access to records and other features. Only administrators and delegated administrators can create and edit public groups.


 **Note:** When you edit groups, roles, and territories, sharing rules are recalculated to add or remove access as needed.

Depending on the nature of your updates and your org's setup, these sharing calculations can take a while to complete. If you experience sharing evaluations or timeouts, consider deferring sharing calculations before making large-scale updates, and then restart and recalculate sharing at a later time. For more information, see [Defer Sharing Calculations](#) in Salesforce Help.


To create or edit a group:

1. From Setup, in the Quick Find box, enter *Public Groups*, and then select **Public Groups**.
2. Click **New**, or click **Edit** next to the group you want to edit.
3. For Label, enter the name used to refer to the group in any user interface pages.
4. Enter the unique Group Name used by the API and managed packages.
5. To allow automatic access to records using your role hierarchies, select **Grant Access Using Hierarchies**. When selected, any records shared with users in this group are also shared with users higher in the hierarchy.

Deselect **Grant Access Using Hierarchies** if you're creating a public group with All Internal Users as members, which optimizes performance for sharing records with groups.

 **Note:** If Grant Access Using Hierarchies is deselected, users that are higher in the role hierarchy don't receive automatic access to records shared with the public group. However, users can still receive access via the role hierarchy if the Grant Access Using Hierarchies setting is enabled on the Sharing Settings page. System Administrators and users with the View All and Modify All object permissions and the View All Data and Modify All Data system permissions can also access records they don't own.

6. From the Search dropdown, select the type of member to add. If you don't see the member you want to add, enter keywords in the search box and click **Find**.

 **Note:** For account owners to see child records owned by high-volume Experience Cloud site users, they must be members of any share groups with access to the site users' data.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create or edit a public group:

- Manage Users

7. Select members from the Available Members box, and click **Add** to add them to the group.

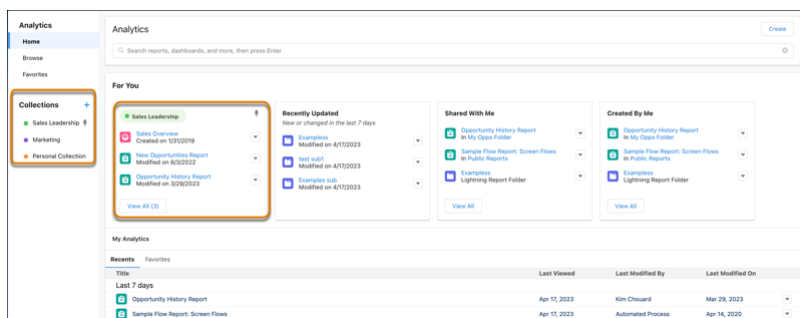
If your group contains more than 10,000 members, you can experience performance issues or group members being deleted when updating membership in Setup. To prevent these issues, adjust group membership using user access policies or the GroupMember API. You can also contact Salesforce Customer Support to enable the modified Group Setup interface.

8. Specify any delegated administration groups whose members can add or remove members from this public group. Select groups from the Available Delegated Groups box, and then click **Add**.
9. Save your changes.

## Stay Organized with Collections

Collections enable you to curate and organize your analytics in a customized way. By creating a collection, you have a personalized set of analytics that's relevant to your projects or interests. Your analytics can be drawn from different folders, and you can avoid searching different folders to access your most important analytics. In addition, collections can personalize the home page that makes it easier to find and use the information that matters most to you.

Add your items, such as those related to a project or commonly used, for immediate access. You can pin collections to your home page, hide collections, and share collections with others.



### EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Available in: Enhanced Folder Sharing

Also available with CRM Analytics, which is available for an extra cost in **Performance, Enterprise, Unlimited, and Developer** Editions.

### USER PERMISSIONS

To use collections:

- **Legacy Folder Sharing**  
Run Reports AND  
Manage  
Dashboards
- **Enhanced Folder Sharing**  
Run Reports AND  
Create and  
Customize  
Dashboards

To manage a collection with CRM Analytics items:

- Use CRM Analytics