Implementation Guide: Marketing Cloud

Salesforce, Summer ’25

’25

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Contents

Manage Your Marketing App

Salesforce admins, 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.

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

Getting Started with Marketing Cloud Setup

To get started with Marketing Cloud, complete some basic settings, then continue through the required and recommended steps. The time it takes to complete setup depends on the features that you want to use.

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

Note: If you want to set up Marketing Cloud only for sending email, check out the Marketing Cloud Quick Start Guides.

Prepare for Setup

Before you start, make sure that you have the necessary roles and permissions. Most tasks require a Salesforce admin with the Marketing Cloud admin permission set and Data Cloud admin permission set. See Manage Permission Set Assignments and User Permissions in Marketing Cloud.

Salesforce admin	A Salesforce admin has permissions to complete tasks in Salesforce Setup, which you can access by clicking ⚙ 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 admin must install data kits and deploy data streams. 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.

Access the Setup Assistant

The Marketing Cloud setup assistant guides you through the required and recommended tasks in Marketing Cloud. To access the setup assistant page, click ⚙. From the Quick Find box, enter `Marketing Cloud`. Then, under Assisted Setup, select **Assistant Home**.

The setup assistant home page includes three sections: Basic Settings, Required Setup, and Additional Settings. Each section shows you how many steps are left based on the checkboxes that you select as you complete the tasks on each page.

You can also track your progress with the Marketing Cloud Setup checklist.

Before you can access all the required and additional settings, you must first go to Basic Settings and enable Marketing Cloud.

Enable Marketing Cloud

Estimated time: Up to 15 minutes

On the Basic Settings page, review the list of required tasks to enable Marketing Cloud. Most of these tasks begin when you purchase Marketing Cloud. After each task is complete, click to enable Marketing Cloud and start the automated process of connecting the necessary content and privacy tools.

If you run into issues, here are some troubleshooting notes for each task.

Note: To succesfully complete all of the prerequisites, you must first enable Data Cloud.

Step	Troubleshooting notes
Enable Data Cloud	In the App Launcher, search for and select **Data Cloud**. Click ⚙ to access Data Cloud Setup and enable it. A Data Cloud admin is required to complete this process.
Create a Salesforce CRM connector	In Data Cloud Setup, open the Connectors page, and click **New**. Select Salesforce CRM and follow the prompts. A Data Cloud admin is required to complete this process.
Add a default email channel	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.
Add 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.
Select a data space	Every active data space that's configured in Data Cloud appears in the dropdown, including the default data space. To learn more about data spaces, including how to create a new data space, see Manage Data Spaces.
Other	If the content management or privacy tools aren't created, contact Salesforce Customer Support.

Complete the Basic Settings and Continue Setup

Estimated time: Variable

After you enable Marketing Cloud, the most important thing to do next is install the data kits and configure your identity resolution rulesets. These tasks are on the same Basic Settings page where you enabled Marketing Cloud.

The remaining pages of Marketing Cloud setup provide you with shortcuts to other required tasks, such as authenticating an email domain for sending and setting up reporting features.

Setup also includes recommended tasks to help you make the most of Marketing Cloud, like activating AI features or customizing your domain.

Configure Your Marketing Data

One of the things that makes Marketing Cloud so powerful is its relationship to Data Cloud. To prepare your Salesforce org for Marketing Cloud, install and deploy the data kits that include the data model objects (DMOs) that support marketing assets. Then, use identity resolution rulesets to organize and unify your data.

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

This table lists the data kits that you must install and deploy to get started. The Setup label is used in Marketing Cloud setup, and the package names appear on the installation and data stream deployment pages.

For complete instructions, see Install and Deploy Data for Marketing Cloud.

Setup Label	Package Name	Details
Marketing Setup Objects Data Kit	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.
WhatsApp Channel Data Kit	UnifiedWhatsAppPackage	Contains a MessagingEventsWhatsApp-WhatsAppEngagement data stream. This data kit is only required when using the WhatsApp add-on.
Sales	—	Contains data streams for accounts, leads, and contacts. Access the installation page for this data kit in Data Cloud Setup.

Install and Deploy Data Streams for Marketing Cloud

Data kits and packages contain the objects, fields, and data connections that make Marketing Cloud work. After you install the data kits, most of the related data streams are deployed. In some cases, you manually deploy the data streams in Data Cloud.

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

User Permissions Needed	
To install data kits and packages:	Salesforce Admin profile OR View Setup and Configuration AND Download App Exchange Packages

User Permissions Needed	
To deploy data streams:	Data Cloud Admin permission set

Install or Update Data Kits

To begin the data configuration process, install the data kits and packages listed on the Basic Settings page of setup.

Data streams consume Data Cloud credits based on the amount of batch data being processed. See Data Cloud Billable Usage Types.

1. From Setup, in the Quick Find box, enter `Basic`.
2. Under Marketing Setup, click **Basic Settings**.
3. In the Install Marketing Data Kits section, click **Install** or **Update**.

   If you're installing for the first time, the listed data kits are installed and their related CRM and ingestion data streams are deployed. If you're updating, the data kits with changes are reinstalled and only the related CRM data streams are deployed. If ingestion data streams are updated, manually redeploy them.

The status of each data kit and its related data streams is shown, so you can confirm that they're installed and deployed successfully. This process takes a few minutes.

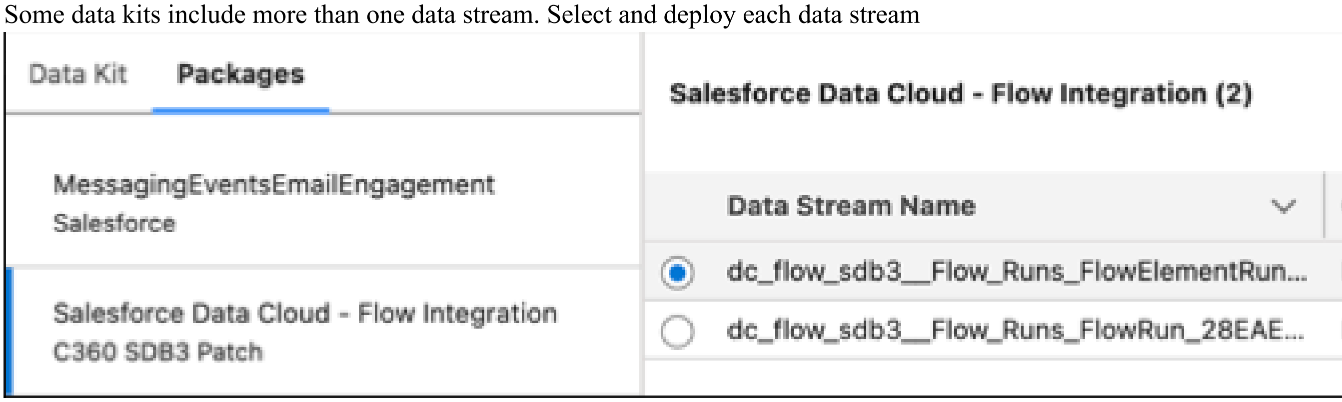
Manually Deploy the Updated Data Streams

Installing the data kits adds the objects and fields that store marketing data. When you deploy the data streams, the data that you capture is available to your marketing tools and processes. Most of the required marketing data streams are automatically deployed, but a Data Cloud admin must manually deploy updates to the marketing ingestion data streams.

The data stream names and field values are predefined by the package and can't be changed.

1. From the App Launcher, find and select Data Cloud.
2. Repeat these steps for each updated ingestion data stream in the MessagingEventsSMS, MessagingEventsWhatsApp-WhatsAppEngagement, Salesforce Data Cloud - Flow Integration, MessagingEventsEmailEngagement, or UnifiedMessagingConsent data kit.
   a) On the Data Streams tab, click **New**.
   b) Select **Installed Data Kits and Packages** and click **Next**.
   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 and click **Next**.

      Some data kits include more than one data stream. Select and deploy each data stream



   f) Review the fields that you're adding, click **Next**, and click **Deploy**.

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.

Configure Identity Resolution Rulesets 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.

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

User Permissions Needed	
To create an identity resolution ruleset:	Data Cloud Admin permission set

Identity resolution rulesets consume Data Cloud credits, which impacts billing. We recommend having only one active ruleset for the Individual object, and one active ruleset for the Account object. Maintaining two rulesets per object increases the amount that you're billed for identity resolution. See Data Cloud Billable Usage Types.

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.

Generate a Ruleset for the Individual Object

When you generate a ruleset for the Individual object, it uses Normalized Email as a match rule.

1. From Setup, in the Quick Find box, enter `Basic`, and select **Basic Settings**.
2. Scroll to the Identity Resolution Rulesets section.
3. In the Unified Individual section, click **Generate Ruleset**.
4. Review the confirmation details and click **Generate**.
5. Confirm that your new ruleset is published.
   a) Go to the Identity Resolutions tab, and then find the ruleset you generated.
   b) Confirm that the ruleset status is published.
6. To get the most out of Identity Resolution, add the recommended rules to the Identity Resolution ruleset.

Configure a Custom Ruleset for the Individual or Account Object

You can manually configure a custom ruleset for the Account object and for the Individual object. A custom ruleset creates unified records that meet your specific business needs/specifications.

1. Create a ruleset. If you have a ruleset to use, skip this step.
   a) On the Identity Resolutions tab, click **New**.
   b) Select **Create New Ruleset**, and then click **Next**.
   c) Select the data space that you use for marketing, and then select **Account** or **Individual** for the Primary Data Model Object.
   d) Enter an ID for the ruleset, and then click **Next**.

      This 4-character ID is appended to the API name to distinguish between rulesets.
   e) Name the ruleset and save your work.
2. From the identity resolution record, create custom rules.
   a) In the Match Rules section, click **Configure**.
   b) Follow the prompts to define the rules that unify related records.
   c) If your ruleset is for the Individual object, add the recommended rules to the ruleset. If your ruleset is for the Account object, skip this step.
3. Define which object to use for personalization.
   a) From Setup, in the Quick Find box, enter `Basic`, and select **Basic Settings**.
   b) In the Create an Identity Resolution Ruleset section, select the Unified Individual or Unified Account object related to your ruleset.

Add Recommended Rules to Your Identity Resolution Ruleset

To get the most out of Identity Resolution, we recommend adding two custom rules to the Individual object ruleset. First, add a rule to match exact values when a lead converts to a contact. If you use web tracking on Marketing Cloud landing pages or a connected external site, add a rule that attributes activity to the correct unified individual.

1. Go to the Identity Resolutions tab, and then open the ruleset that you created for the Individual object.
2. Under Match Rules, click **Edit**, and then click **Next**.
3. Click **Add Match Rule**.
4. Click **Custom Rule**, and then click **Next**.
5. Name your rule. For example, "Lead to Contact" or "Device Visitor Identification."
6. Select the match criteria.
   a) For Data Model Object, select **Identity Match**.
   b) For Field, select **Identity Match Type**.
   c) For Match Method, select **Exact**.
7. Under Advanced Settings, click **Configure**, and then enter the Identity Match Type for the first custom rule.
   - For lead to contact conversion, enter `lead-to-contact`.
   - For web tracking attribution, enter `device-to-known`.
8. Click **Back To Basic Settings**, and then click **Next**.
9. To add the second rule, repeat steps 3 through 8 and use the remaining Identity Match Type.
10. Save your work.

Manage User Access

Add users and assign roles and permissions to make sure your team can access the necessary tools to complete their work in Marketing Cloud.

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

Assign Permission Sets for Marketing Cloud

You can create users and assign permissions after setting up the data streams. 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.

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

User permissions needed	
To assign permission sets:	Assign Permission Sets system permission OR Marketing Cloud Admin permission set

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.

Turn On the Privacy Preference Manager Tab for Users

Before a user can edit the default email preference page or access Preference Manager tools, turn on the Privacy Preference Manager tab in Marketing Cloud. Edit the Standard User Profile to make the tab Default On.

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

User Permissions Needed	
To edit the preference page:	Modify All Data OR Marketing Cloud Admin permission set

1. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.
2. Select **Profiles**, and then edit the **Standard User** profile.
3. In the Tab Settings section, find the Privacy Preference Manager tab and select **Default On**.
4. Save your work.

Repeat these steps for other user profiles as needed.

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.

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

User permissions needed	
To add contributors to a workspace:	Content Admin role

These contributor roles are available.

- Content Admin: Users who have this role can manage users and sharing settings, create and publish all content in a CMS workspace, and assign a default brand to a marketing workspace.
- Content Manager: Users who have this role can create and publish all content in a CMS workspace and assign a default brand to a marketing 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 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.

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

User permissions needed	
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

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**.

Set Up Identity-Licensed Users in Marketing Cloud

Identity-licensed users can access Marketing Cloud using Salesforce single sign-on. You can assign Identity-licensed users most of the same permissions as Marketing Cloud Managers, including full access to campaigns, segments, flows, and shared Analytics reports. Clone the Identity-licensed user profile and customize the permissions for Marketing Cloud, then assign the profile to new users.

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

User Permissions Needed	
To add users:	Manage Internal Users
To create and edit profiles:	Manage Profiles and Permission Sets

Note: Identity-licensed users can't access Marketing Cloud setup or Opportunity Influence settings in Salesforce Setup.

Configure an Identity Profile for Marketing

1. From Setup, in the Quick Find box, enter `Profiles` and then select **Profiles**.
2. Find the Identity User profile, and then click **Clone**.
3. Enter a profile name and save your changes.
4. In Tab Settings, change the visibility to Default On for these tabs: Analytics, Briefs, Campaigns, Consent, Contacts, Content, Flows, Home, Leads, and Segments.
5. Customize page layouts and permissions as needed.
6. Save your changes.
7. Repeat steps 1-6 to create additional Identity User profiles for marketing.

Create an Identity-Licensed User for Marketing

1. From Setup, in the Quick Find box, enter `Users` and then select **Users**.

2. Click **New User**.
3. In the User License dropdown, select **Identity**.
4. In the Profile dropdown, select the identity user profile you configured for marketing.
5. Save your changes.
6. Add the necessary permissions to access marketing manager tools and Marketing Performance dashboards.
   a) In Permission Set Assignments, click **Edit Assignments**.
   b) Add two permission sets: the Marketing Cloud Manager and Tableau Next Included App Business User.
7. To add more Identity-licensed users for marketing, repeat steps 1-6.

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.

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

User permissions needed	
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

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 for email.
   a) From Setup, in the Quick Find box, enter `Channels`, and then select **Email**.
   b) Review the consent validation settings for promotional and transactional email messages.
3. To use custom communication subscriptions for your marketing channels, see Create a Communication Subscription.
4. To create a consent import, see Import Consent Data.
5. To customize the banner that asks page visitors for consent to track web activity, see Activity Tracking in Marketing Cloud.

By default, the email preference page includes the default marketing communication subscription. To add or remove subscriptions, see Edit the Email Preference Page.

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.

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** or **Advanced** Edition, and in **Starter** and **Pro Suite** Editions. Your edition determines the options that you have.

User Permissions Needed	
To create communication subscriptions:	Marketing Cloud Manager OR Marketing Cloud Admin permission set

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 or WhatsApp as a channel, select at least one sender code or channel number.
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 a Default Preference Page in Marketing Cloud

Marketing Cloud comes with default preference pages for email, SMS, and WhatsApp. Preference pages are visible to subscribers when they click the Preference Manager link in a marketing message. The default marketing communication subscription is included on the page, but you can add or remove subscriptions as needed. Preference pages are customized for each recipient.

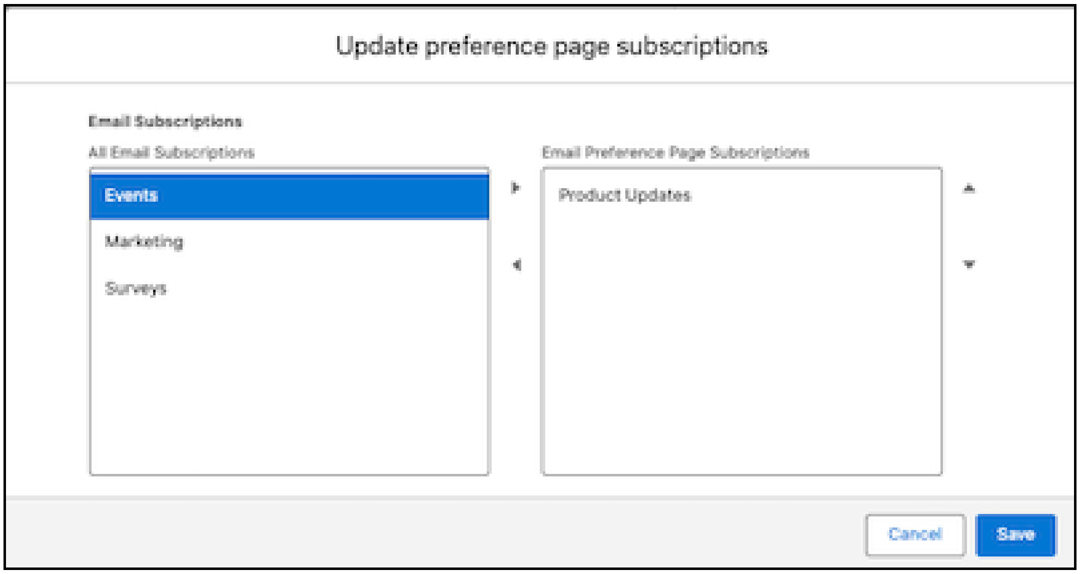
Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** or **Advanced** Edition

User Permissions Needed	
To edit the preference page:	Marketing Cloud Manager OR Marketing Cloud Admin permission set

When you save changes to a preference page, the page is immediately published and visible to your subscribers.

1. From the Consent page, select **Preference Pages and Subscriptions**.
2. For the email, SMS, or WhatsApp 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.

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 a message.

Certain merge field links, such as the Preference Manager and Unsubscribe links, aren't functional when you preview an email, SMS, or WhatsApp message. You can review default preference pages on the Consent tab.

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.

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** or **Advanced** Edition, and in **Starter** and **Pro Suite** Editions. Your edition determines the options that you have.

User Permissions Needed	
To create a consent import:	Marketing Cloud Admin OR Marketing Cloud Manager permission set

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**.

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.

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** or **Advanced** Edition, and in **Starter** and **Pro Suite** Editions. Your edition determines the options that you have.

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.

To update the consent status for existing leads and contacts, import consent data from the Consent tab.

To create new leads and contacts and include consent data, import from the Leads or Contacts tab and use the consent values `OptIn` and `OptOut`.

Review these other considerations before you import consent data.

- 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.

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 one of these supported DateTime datatypes.

- `yyyy-MM-dd HH:mm:ss.SSSZ`
- `MM/dd/yyyy HH:mm:ss`
- `MM/DD/YYYY`
- `yyyy-MM-dd`
- `M/DD/YYYY`

This table breaks down the format for DateTime datatypes.

Letter Code	Date or Time Component	Example
yyyy-MM-dd	Date in year-month-day format	2023-05-01
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 and WhatsApp File Guidelines

When formatting a CSV to import consent data for SMS or WhatsApp 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.

Set Up Channels in Marketing Cloud

Marketing Cloud supports a multichannel marketing strategy that includes email, landing pages, SMS, and WhatsApp. Learn how to configure the required settings for each channel.

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

Configure Required Email Settings

To send emails with Marketing Cloud, you must authenticate a domain for sending, verify at least one sender email address, and provide a physical address to include in your email. In some cases, such as upgrading from Starter or Pro Suite, you also transfer email sending capabilities to Marketing Cloud.

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

User permissions needed	
To modify organization-wide addresses:	Modify All Data OR Marketing Cloud Admin permission set

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. Work with your IT administrator to configure DKIM settings that add a recognized digital signature to your emails and can improve your deliverability.

   Note: In some cases, such as upgrading from Starter or Pro Suite, the email authenticated domains page guides you through the process of transferring your sending activities to . Before you complete the transfer, pause your active campaigns. After you complete the transfer, resume the paused campaigns that you want to continue.

2. 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. See Authenticate a From Address for Unified Messaging.

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

   To maintain regulatory compliance, all marketing and transactional emails must include a physical address.

   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.

Authenticate a Domain for Unified Messaging

To send email messages, authenticate a sending domain and verify From email addresses.

Make sure that you have access to the relevant DNS information. Work with your internal IT team to implement the necessary DNS configuration, including configuring the appropriate DNS and DMARC records.It can take up to 48 hours for DNS changes to take effect.

Available in: Lightning Experience
Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** and **Advanced** Editions
Not supported in Government Cloud Plus

1. From Setup, in the Quick Find box, enter `Authenticated Domains`, and then select **Authenticated Domains**.
2. Click **Add Domain**.
3. Review the prerequisites and click **Continue**.
4. Enter the subdomain information that you want to use for sending, and then click **Submit**.
5. Configure your DNS records with your domain registrar.

   Note: When you configure a subdomain, include any subdomain information in your CNAME records. For example, if your subdomain value is `mktg.example.com` and your Name column includes the value `s1-e360-000000000000000._domainkey`, then your CNAME record must contain a mktg value of `s1-e360-000000000000000._domainkey.mktg.example.com`.

6. Verify that you've completed the DNS record upload and click **Verify Domain**.

After you complete authentication for a domain, the status becomes Active and the domain is ready to use for sending.

Note: Marketing Cloud email messages that you send from an authenticated domain automatically pass the DomainKeys Identified Mail (DKIM) and Sender Policy Framework (SPF) authentication methods.

Authenticate a From Address for Unified Messaging

Add an authenticated From address using an authenticated domain when sending messages from a Unified Messaging email channel. This address appears in the From section of all emails sent from this channel.

Available in: Lightning Experience
Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** and **Advanced** Editions
Not supported in Government Cloud Plus

1. From Setup, in the Quick Find box, enter `Authenticated From Addresses`, and then select **Authenticated From Addresses**.
2. Click **Add From Addresses**.
3. Enter a Display Name value.

   The Display Name is who the email appears to be sent from.

4. Enter the username portion of the address, and then select an authenticated domain.

   The username is the part of the email address that comes before the @, such as username@example.com.
5. Save your changes.

After the process is complete, your From address is ready for use.

Configure Reply Mail Management for a Unified Messaging Domain

Automatically reply to incoming email messages, delete unwanted responses, and forward messages to a specific inbox to review later.

Available in: Lightning Experience
Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** and **Advanced** Editions
Not supported in Government Cloud Plus

1. From Setup, in the Quick Find box, enter `Authenticated Domains`, and then select **Authenticated Domains**.
2. Click the dropdown next to the domain you want to use and select **See Details**.
3. Select **Reply Mail Management**.
4. Choose whether to delete automatic replies and out-of-office messages automatically.
5. Choose whether to forward other responses to a specific inbox, then choose the email address to receive the messages.

   If you don't specify an email address, incoming messages are logged and deleted.
6. Save your changes.

After you enable this feature, RMM evaluates all manual replies. If a reply includes any of these terms in the first 200 characters of the email body, the email address that sent the reply is unsubscribed.

- unsub
- unsubscribe
- opt-out
- remove
- stop

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.

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

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.

Set Up WhatsApp in Marketing Cloud

Reach a global audience with personalized conversational messages that can include text, audio, video, and other rich content.

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

1. From Setup, in the Quick Find box, enter `Your`, and then select **Your Numbers**.
2. Install the required managed packages for consent and engagement. See Manage WhatsApp Consent in Unified Messaging.
3. Create or connect a WhatsApp Business Account. See Connect Your WhatsApp Business Account.
4. Review or update your consent validation settings in Marketing Cloud.
   a) From Setup, in the Quick Find box, enter `Channels`, and then select **WhatsApp**.
   b) Choose whether to check consent on a communication subscription before sending promotional and transactional messages.

After you connect your WhatsApp Business Account to Salesforce, you can:

- Create communication subscriptions to store consent for WhatsApp messages.
- Import consent data.
- Set up Marketing Performance to get metrics about your new channel.
- Begin crafting WhatsApp campaign content.

Configure Web 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.

Content Type	Requirements
Marketing Cloud Landing Pages with consent banner	• Data Cloud integration • Data Cloud Web Tracking Consent Banner integration • Banner design settings
Marketing Cloud Landing Pages without consent banner	• Data Cloud integration • Relaxed CSP security level for Landing Pages site • Event tracking code in Landing Pages site head markup
External Pages with consent banner	• External Tracking data kit • Website connector • Banner design settings • Snippet in external page source

Content Type	Requirements
External Pages without consent banner	• External Tracking data kit • Website connector • Snippet in external page source

Considerations for Activity Tracking

To configure activity tracking, you must integrate and connect Data Cloud and the default Marketing Cloud Landing Pages site. Before you enable activity tracking, review other considerations, compliance details, and cookie information.

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

Compliance

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.

If consent to track is required, each visitor’s first page view isn't recorded because it occurs before they provide consent.

Implementation

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 default consent banner is used for both landing pages and external websites. Settings and styles apply everywhere the banner is used.

Tracked Data

After you configure web tracking, these activities are tracked.

- Page views
- Form submissions
- Link clicks
- Button clicks

Tracking Cookie Reference

Marketing Cloud uses cookies to identify landing page visitors and track activities. When Marketing Cloud sets a tracking cookie, a unique identifier is stored for each landing page visitor but we do not store personally identifying information.

On Salesforce-hosted domains, tracking cookies are set at the subdomain level such as example.my-salesforce.com. If you use a custom domain, tracking cookies are set at the root domain level and allow you to track activity on all subdomains of the root domain.

Cookie Name	Duration	Classification	Details
guest_uuid_essential_<15-char SiteID>	365 days	Not required	This cookie is no longer used, but is set when someone visits a landing page or tracked site.

Cookie Name	Duration	Classification	Details
sfid${domainHash}	730 days	Not required	When someone visits a landing page, the _sfid_ ${domainHash} cookie is set and creates a unique ID for that visitor.
sfmc_consent	365 days	Required	The sfmc_consent cookie is set when a visitor opts in or out of tracking from the consent banner. If a 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

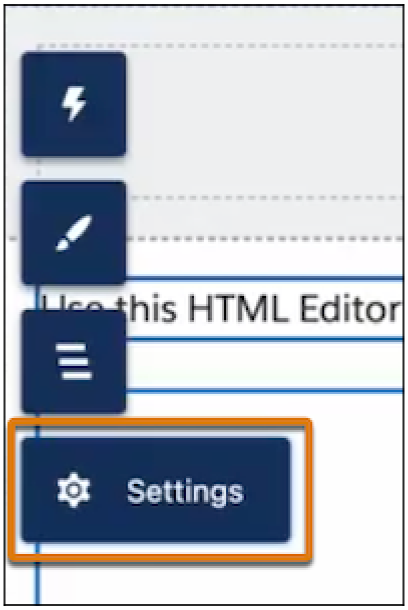
Track visitor activities on your Marketing Cloud landing pages. To protect the privacy of your landing page visitors, use the default consent banner to collect consent to track. You're responsible for complying with privacy laws and regulations applicable to your business.

Track Activity with Consent Banner

To collect consent for tracking, enable and customize the consent web banner. 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`.

1. From Setup, in the Quick Find box, enter `Web Tracking`, and then select **Web Tracking Setup**.
2. 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.

3. Add the banner integration to your landing pages.
    a) From Setup, in the Quick Find box, enter `All Sites`, and select **All Sites** under Digital Experiences.
    b) Next to Marketing Landing Pages, select **Builder**.
    Landing pages in use 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 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.

Enable Tracking Without Consent Banner

To track activity without collecting consent, you can publish a code snippet to your landing pages.

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,
```

```
            },
        })
    );
</script>
```

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

Track Activity on External Sites

Track visitor activities on web pages hosted outside of , 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.

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

User Permissions Needed	
To configure external tracking:	Marketing Cloud Admin permission set AND Data Cloud Admin permission set

Important: The steps on this page walk you through how to set up external tracking for the first time. If you set up external tracking before Summer '25, follow the steps in this Knowledge Article to update your configuration.

1. From Setup, in the Quick Find box, enter `Web Tracking`, and then select **Web Tracking Setup**.
2. In the Track on External Sites section, click **Install Data Kit**, and then use the Admins Only option to install the External Tracking data kit.
3. In the Create Website Connector section, enter a name for the connector, and then click **Create**.
4. Deploy the Behavioral Events and Identity data streams.
   a) In the Deploy Data Streams section, click **Go To Data Streams**, and then click **New**.
   b) In the Other Sources section, click **Installed Data Kits & Packages**.
   c) On the Data Kits tab, click **External Tracking**, select all the bundles, and then click **Next**.
   d) For the Connector Type, select **Website**.
   e) Review the stream's details, click **Next**, and then deploy the data streams.
   f) Click **Save & Close**.
5. Select the Behavioral Events data stream that you just created, and then click **Review**.
6. Map these fields:

   To filter the fields, enter `utm` in the search fields.

   - cdp_sys_utm_campaign to UTM Campaign
   - cdp_sys_utm_content to UTM Content
   - cdp_sys_utm_id to UTM Id
   - cdp_sys_utm_medium to UTM Medium
   - cdp_sys_utm_source to UTM Source
   - cdp_sys_utm_source_platform to UTM Source Platform
   - cdp_sys_utm_term to UTM Term
7. Click **Save & Close**

8. Deploy the MarketingStreamingAppConfig data stream.
   a) Create another data stream using the connected source Salesforce CRM.
   b) In the Custom Data Bundles section, select the **MarketingStreamingAppConfig** bundle, and then click **Next**.
   c) On the Data Kits tab, click **MarketingStreamingAppConfig**, select all bundles, and then click **Next**.
   d) Confirm the details and then deploy the data stream.
9. On the Web Tracking Setup page, in the Manage Website Connectors section, select the new connector and a related campaign, and then save your changes.
10. Add the connector script to your website.
    a) From Setup, in the Quick Find box, enter `Website`, and then select **Websites & Mobile Apps**.
    b) Open the website connector you created.
    c) In the Integration Guide section, copy the URL in the Script field, and then add it to your website's head tag as the first step in enabling data collection.

To verify that the tracking is set up correctly, refresh the website connector detail page and confirm that the status is In Use.

Apply and Customize the Consent Banner

On external pages, you can add a banner that asks visitors for consent to track their engagement. You're responsible for complying with privacy laws and regulations applicable to your business.

1. 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.
2. In the External Websites section, activate the toggle next to Require Consent to Track.
3. Save your work.

You can edit the banner settings at any time, and the updates apply to your external page via the Script code. To view recent changes, refresh the external page.

Set Up Reporting in Marketing Cloud

To get detailed reporting insights and embedded dashboards for your campaigns, install the Marketing Performance app. Marketing Cloud also includes preconfigured reports and dashboards that you can customize on the Analytics page.

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

Install and Connect Analytics Objects

Install the analytics packages and add users to analytics folders. Then, head to Digital Experiences to finalize the data connection.

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

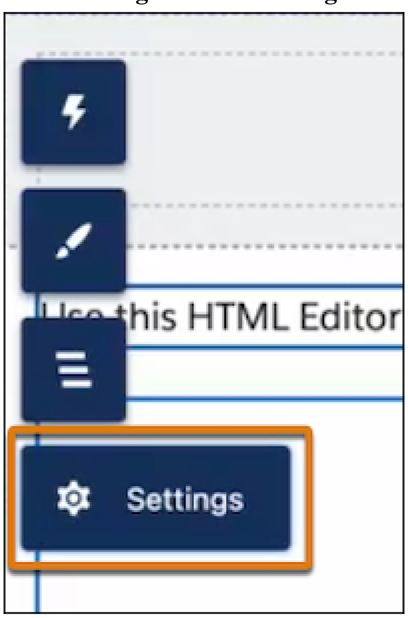
User Permissions Needed	
To install data kits and packages:	View Setup and Configuration OR Salesforce Admin profile OR Marketing Cloud Admin permission set

User Permissions Needed	
To deploy data streams:	Data Cloud Admin 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

Before you install the analytics packages, make sure to install and deploy the required marketing data kits.

1. From Setup, in the Quick Find box, enter `Marketing Cloud`. Under Reporting and Optimization, select **Analytics**.
2. From the Analytics Packages section, install the Marketing Engagement Analytics package for all users.
3. (Optional) If you're using the SMS add-on, repeat these steps for the SMS Analytics package.
4. (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**.

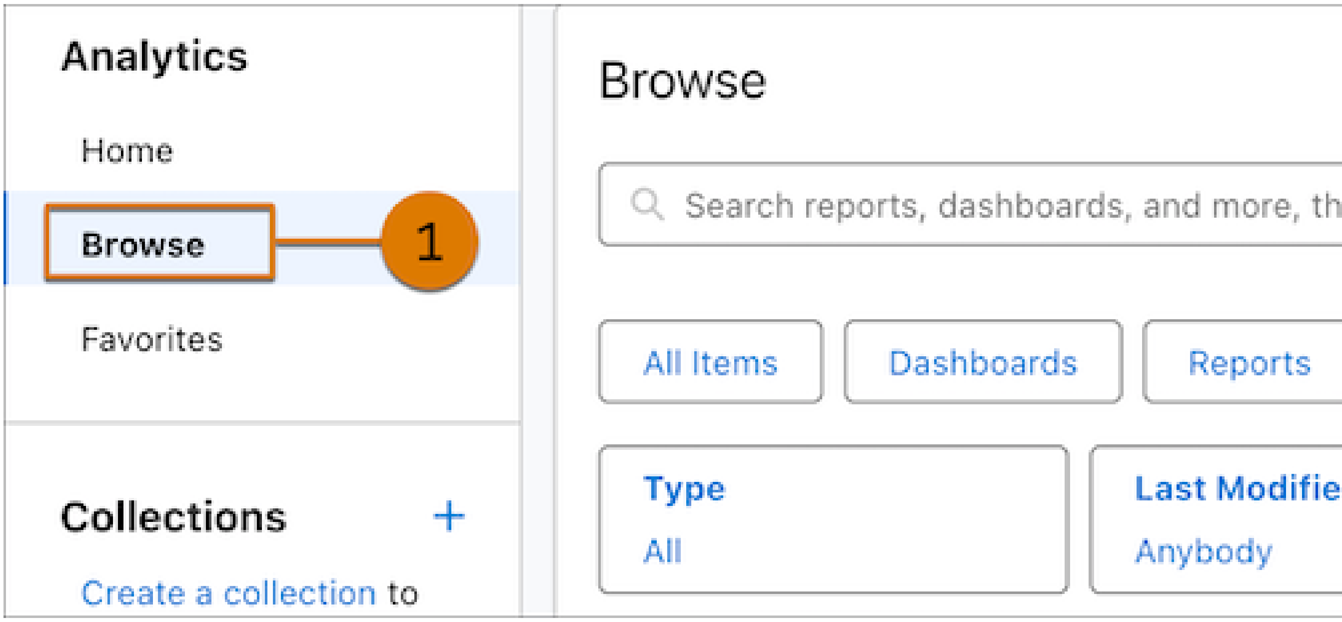
   Landing pages in are served using the Sites framework. This site operates behind the scenes—don't add content to it.
   c) Click **Settings** and select **Integrations**.



   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, in the site toolbar, click **Publish**.

   If you don't need to track consent, skip this step and see Activity Tracking for Landing Pages.
   f) From Setup, in the Quick Find box, enter `Marketing Cloud`. Under Reporting and Optimization, select **Analytics**.
   g) Install the Landing Pages and Forms Analytics package for all users.

5. From the 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.

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.

Set Up Marketing Performance

Marketing Performance uses Data Cloud and to present detailed metrics about your campaigns and content. Get embedded reporting in your campaign records, and access a comprehensive dashboard with insights and trends about your overall marketing efforts.

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

User Permissions Needed	
To enable Marketing Performance:	Data Cloud Admin and Marketing Cloud Admin permission sets
To view Marketing Performance dashboards:	Tableau Einstein Included App Business User permission set

Note: Using the Marketing Performance feature consumes Data Cloud credits, which can increase your bill. Learn more about the billing impact of Data Cloud-powered features.

1. From Setup, in the Quick Find box, enter `Marketing Performance` and click **Marketing Performance**.
2. Confirm that you have these prerequisites:
   a) Make sure that you've installed the required Marketing data kits.
   b) To personalize marketing content with data, set up Personalization.
   c) To include web tracking data in reports, such as custom tracked link activity, configure web tracking.

3. In the Install Marketing Performance section, click **Install**.

   To start the install, you must have both the Data Cloud Admin and Marketing Cloud Admin permission sets. You can monitor the install progress on the new Marketing Performance tab. To view the success or failure messages associated with your install, under Monitoring, click the Event name.
4. Assign the Tableau Einstein Included App Business User permission set to any users who require access to Marketing Performance data. See Assign Permission Sets for Marketing Cloud Growth.
5. In the Marketing app, go to the Marketing Performance tab to view the main dashboard and confirm that your install is complete.

   To learn more about Marketing Performance dashboards, see Measure Success in Marketing Cloud.

Set Up Analytics Reports and Dashboards

Marketing analytics packages include pre-configured dashboards and folders with reporting data about your marketing efforts.

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

This table lists the main analytics packages that you install to access reporting tools. The Setup label is used in setup, and the package names appear on the installation and data stream deployment pages.

Setup Label	Package Name	Details
Marketing Engagement Analytics	Marketing Analytics	This package contains these Analytics folders for dashboards and reports: • Email Engagement Dashboard • Email Engagement Dashboard V2 • Email Engagement Reports • Email Engagement Reports V2 Both dashboards are dynamic, and you can add users to each folder on the Analytics tab.
Flow Reports Analytics	Salesforce Data Cloud - Flow Reports	This package contains these Analytics folders for dashboards and reports: • Flow Reports You can add users to each folder on the Analytics tab.
SMS Analytics	Marketing Analytics - SMS	This package contains these Analytics folders for dashboards and reports: • SMS UMA Dashboards • SMS UMA Reports This package is available only when using the SMS add-on.

Setup Label	Package Name	Details
Landing Pages and Forms Analytics	Marketing Analytics - Landing Pages and Forms	This package contains these Analytics folders for dashboards and reports: • Forms Engagement Dashboards • Forms Engagement Reports • Landing Page Engagement Dashboards • Landing Page Engagement Reports Before you install this package, add Data Cloud integrations to the default Marketing Landing Pages site.

Customize the Analytics Page

To help users find and interact with reports and dashboards, create collections and filters.

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

User Permissions Needed	
To customize the Analytics tab:	Marketing Cloud Admin permission set OR Marketing Cloud Manager permission set

1. To simplify how users find reports and dashboards, create a collection on the Analytics tab.
   a) In , open the Analytics tab.
   b) In the Collections widget, click +, and give the collection a name.
   c) Search and select the reports and dashboards to include in the collection.
2. To further customize the dashboards, add filters.
   a) From the Analytics tab, open a dashboard, and then click + **Filter** in the toolbar.
   b) Select a field to filter, and give the filter a name.
   c) Add filter values as needed. When you finish, click **Apply**.
   d) To save the filter, click **Add**, and then save the dashboard.

Score People and Accounts in Marketing Cloud

Score leads, contacts, prospects, and accounts based on how engaged they are with your marketing efforts, how closely they resemble your ideal customer, and optionally, how likely an account is to buy from you. Customize default scoring rules and decide how engagement and fit scores factor into the overall marketing scores for individuals and accounts. Use the scores to build segments and create targeted content.

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

For an overview of scoring in Marketing Cloud, check out this video.

Considerations for Scoring in Marketing Cloud

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

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

- 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 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 exact attribute values and use the correct capitalization style. For example, to specify an unsubscribe from an email, you must enter "UNSUBSCRIBE".
- To make sure attribute values are exact, enable value suggestions for Text data type fields. See Edit Data Model Object Properties.
- 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.
- You can have up to 30 engagement rules and 30 fit rules.
- You can have up to 10 conditions per rule. Each condition that is nested in a condition group counts toward this limit.
- Each person's engagement and fit scores are a simple sum of points. However, the overall marketing score is normalized to provide a number from 0 to 100.

Configure Scoring Rules in Marketing Cloud

To begin scoring leads, contacts, prospects, and accounts, select unified individual and account objects to score on. Then, customize scoring rules for engagement, fit, and, for accounts, intent to buy. You can use default scoring rules or customize them. You can also add or delete rules, and create complex rules with multiple conditions.

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

User Permissions Needed	
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

To see a walkthrough of scoring rule setup, check out this video:

Create Unified Identity Rulesets

Before setting up Scoring Rules, first create Identity Resolution Rulesets for Individuals and Accounts.

Set Up Engagement and Fit Scoring Rules

1. From Setup, in the Quick Find box, enter `Marketing Cloud`, and select **Reporting and Optimization** > **Customer Engagement**.
2. Next to Customize Scoring Rules, click **Enable Scoring** and turn on all scoring features.
3. After Scoring is enabled, click **Go to Scoring Setup**.

4. On the **People** tab, in the Unified Individual Object section, click **Select Object**, select an object to score on, and save your work.

   Leads, contacts, and prospects receive scores based on their unified profiles.
5. In the Overall Score section, decide how to weigh engagement and fit to create an aggregate marketing score for each person.
6. Select the **Accounts** tab.
   a) (Optional) Enable intent scoring, change the score ratio to equal 100%, and click **Save**.

   If you enable account intent scoring, republish the scoring rules.

Review the default scoring rules. You can edit the default rules, or create your own custom engagement and fit rules for Unified Individuals.

Create a Custom Scoring Rule

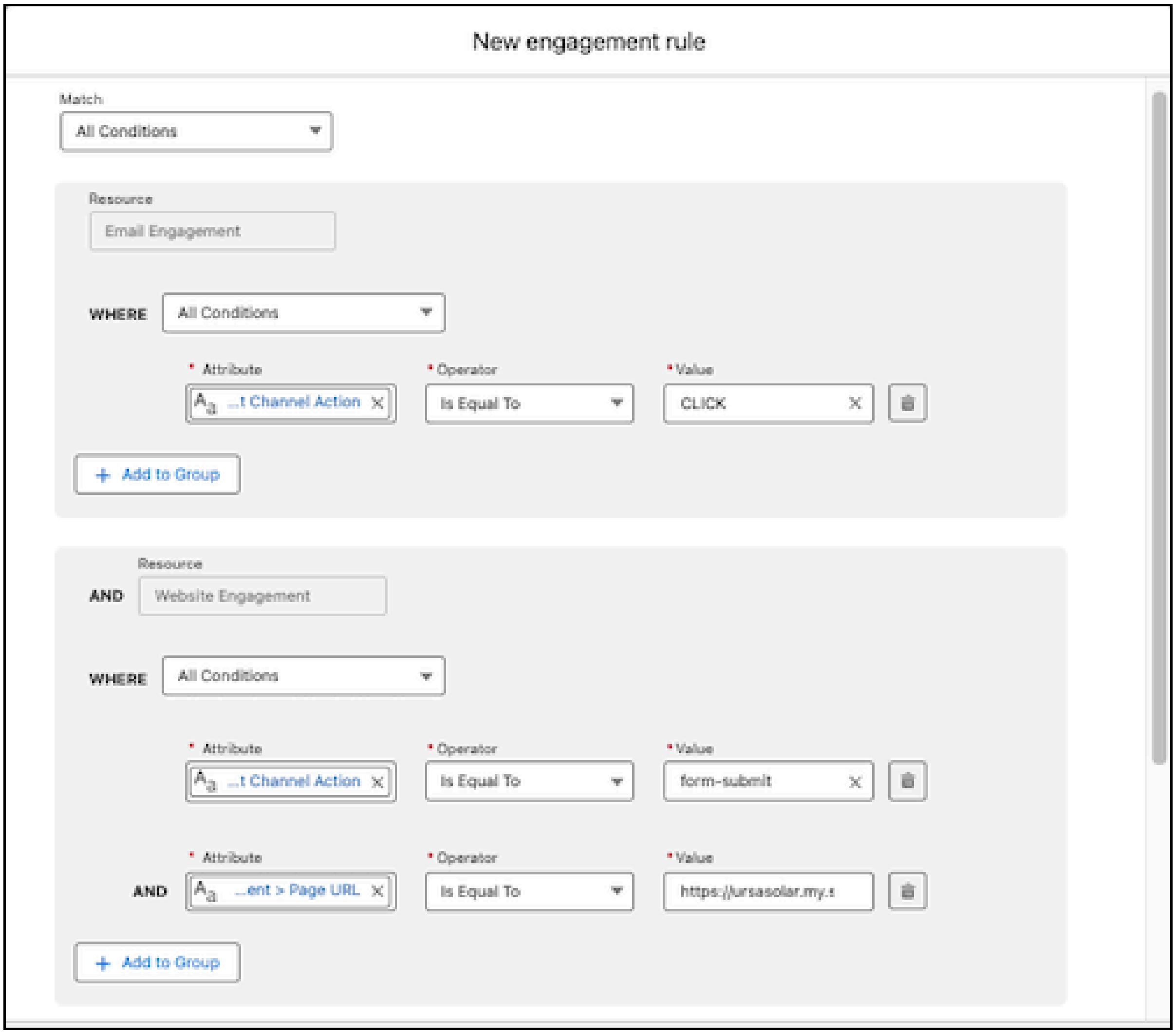
You can create custom rules to fit your needs. When you create a rule, each attribute represents a record field and the value is the data you're interested in. For example, Engagement Channel Action is an attribute, and CLICK is a value.

1. From the Scoring Rules page, create an engagement or fit rule.
2. On the Match dropdown menu, select the logic for your rule.

   You can apply the rule based on any or all of the conditions that you specify.
3. Use the dropdowns for Attribute, Operator, and Value to complete the first condition for your rule.

   Enter the exact attribute value and use correct capitalization. To make sure attribute values are exact, we recommend enabling value suggestion for Text data type fields that you reference most often. See Edit Data Model Object Properties.
4. To add a top-level condition, click **Add Condition**.

5. Add more conditions as needed. To create a condition group, click **Add to Group**.



6. Enter the number of points to add or subtract when someone meets the rule conditions.
7. When you're ready, click **Done**.

To start scoring your leads, contacts, prospects, and accounts, publish the rules. Scores are immediately applied to records related to the unified individual and unified account objects selected and can be used to build segments.

To show scores on lead and contact pages, add the Data Cloud Profile Insights component to your page layouts. Account scores can't be added to account pages.

Activate AI Features in Marketing Cloud

Marketing Cloud includes features that use generative AI and predictive AI to save time and improve your key performance indicators (KPIs). These features aren’t dependent on each other, so you can choose the features the best fit the needs of your business.

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

User Permissions Needed	
To enable AI features, including Agentforce	Marketing Cloud Admin permission set

Get Started with Briefs and Campaigns

To jump-start a new marketing effort, AI can draft a campaign brief, a campaign, and campaign components. AI can also suggest a relevant segment. When you use AI, the security of your business and customer data is protected by the Einstein Trust Layer.

1. Set up generative AI in Salesforce. To get started, see Generative AI Quickstart Guide.
2. Enable Marketing Cloud features and agents.
   a) In Setup, search for `Einstein for Marketing`.
   b) On the Reporting and Optimization tab, turn on each feature that you want to use.
3. Turn on Einstein Segment Creation.
   a) In Setup, search for `Features`, and select **Feature Manager**.
   b) Enable Einstein Segment Creation.

After you turn on these features, they're immediately available. Add the marketing-specific topics and associated standard actions in Agent Builder.

Enable Marketing-Specific Topics and Standard Actions in Agent Builder

Einstein uses several marketing-specific standard actions organized into topics to create briefs, campaigns, and campaign components. Enable these options after you enable Einstein generative AI and Agentforce.

1. In the Marketing Campaigns topic, make sure that these standard actions are in the topic. If not, add the actions to the topic.
   - Marketing Cloud: Draft a Campaign Brief
   - Marketing Cloud: Save Campaign Brief
   - Marketing Cloud: Create a Campaign from a Brief
   - Marketing Cloud: Save Campaign
   - Marketing Cloud: Campaign Summary
2. In the Content Creation topic, make sure that the Marketing Cloud: Draft Content and Create Section with Content standard actions are in the topic. If not, follow these steps to add the action to the topic.
3. Add the Marketing Campaigns and Content Creation topics from the Asset Library using these steps.

To ground your results, enter your company's brand identity and select a default tone in the branding section of the content builder.

Optimize Email Send Times

Einstein Send Time Optimization is a predictive AI feature that uses historical data to help you send emails on the days and times when your customers are most likely to open them. To use this feature in Marketing Cloud Growth Edition, you must opt in to the Global Data Model for Einstein. In Marketing Cloud Advanced Edition, you can enable global models or disable them to opt out.

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 .
2. From Setup, in the Quick Find box, enter `Send Time`, and select **Einstein Send Time Optimization (STO) with Global Models**.
3. Review the global model information, and click **Enable**.

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

For more information about data, review the Einstein Send Time Optimization Model Card.

You can build and use a data graph to capture, automate, and personalize Einstein Send Time Optimization scores for your flows.

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 disable this feature, your engagement metrics are more likely to include bot activity.

For more information about data, review the Einstein Metrics Guard model card.

Increase Customer Engagement with Einstein Engagement Scoring

Einstein Engagement Scoring is a predictive AI feature that uses historical data to assign individual contact-level scores to determine the most efficient way to message recipients to increase customer engagement. This feature is available only in Marketing Cloud Advanced edition.

1. Verify that you have an identity resolution ruleset that uses Individual as the primary data model object.
2. From Setup, in the Quick Find box, enter `Scoring`, and select **Einstein Engagement Scoring**.
3. Review the information, and click **Enable**.

Einstein Engagement Scoring needs some time to gather data and build a model that's specific to your campaign. If you disable this feature, Einstein doesn't score new contacts, but previously scored contact data remains available.

For more information about data, review the Einstein Engagement Scoring model card.

Using Einstein Engagement Scoring with the Einstein Decision element in a flow requires configuration of a data graph. In the configuration pane of the Einstein Decision element, select any of the data graph fields as the Resource in a condition.

Analyze Behavioral Data with Einstein Engagement Frequency

Einstein Engagement Frequency is a predictive AI feature that aggregates behavior data to determine how frequently to contact customers and improve the likelihood of customer engagement. This feature is available only in Marketing Cloud Advanced edition.

1. Verify that you have an identity resolution ruleset that uses Individual as the primary data model object.
2. From Setup, in the Quick Find box, enter `Frequency`, and select **Einstein Engagement Frequency**.
3. Review the information, and click **Enable**.

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

For more information about data, review the Einstein Engagement Frequency model card.

Using Einstein Engagement Frequency with the Einstein Decision element in a flow requires configuration of a data graph. In the configuration pane of the Einstein Decision element, select any of the data graph fields as the Resource in a condition.

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.

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

For more information, see Create and Configure Lightning Experience Record Pages.

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

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

Configure this component for each score that you want to show: Marketing Engagement Score, Marketing Fit Score, and Overall Marketing Score. Select these values for each component.

- 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 OR Marketing Fit Score OR Overall Marketing Score

For the Measure field, use the value for the calculated insight you selected.

- Marketing Engagement Score: Engagement__Score__c
- Marketing Fit Score: Fit_Score__c
- Overall Marketing Score: People_Score__c

Helpful Resources

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

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

Campaigns and Flows

Resource	GROWTH EDITION	ADVANCED EDITION
Total active flows	500 simultaneously active flows	750 simultaneously active flows
Total saved flows	50,000 saved flows	50,000 saved flows

Resource	GROWTH EDITION	ADVANCED EDITION
Versions per flow	50 versions	50 versions

Segments

For more information about limits that apply to segments, see Data Cloud Limits and Guidelines.

Play a video: Data Cloud Credits Estimation

Content and Messaging

For the latest information about message credits and rates, review Multipliers for Salesforce Message Credits. This chart shows credits based on a yearly contract, but the total number of credits depends on the actual contract length. You can use credits at any time over the course of your contract.

SMS credits aren't included with any edition, but can be purchased as an add-on.

Resource	GROWTH EDITION	ADVANCED EDITION
Salesforce Message Credits - Email	180,000 credits per year	360,000 credits per year
CMS storage	10 GB plus 2 GB per user	10 GB plus 2 GB per user

Scoring and Data

Resource	GROWTH EDITION	ADVANCED EDITION
Fit scoring rules	30 rules	30 rules
Engagement scoring rules	30 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.

Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** or **Advanced** 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, Agentforce Admin, Prompt Template Manager, and full control on campaigns, segments, and flows.
Marketing Cloud Manager	Full control to manage campaigns, segments, and campaign (non-admin) flows, and access to use Agentforce and Prompt Templates.

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 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, generate, 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.

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

Flow Permissions in

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 Path Experiment Element to Flows	Allow users without the Manage Flow user permission to add the Path Experiment 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.

Name	Description
Add Transform Element to Flows	Allow users without the Manage Flow user permission to add the Transform 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 Element to 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.
Can Marketing User Debug Marketing Flows	Allow Marketing Cloud users to debug flows.
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 Automation Event-Triggered Flows	Allow users without the Manage Flow user permission to create, edit, and delete automation event-triggered flows in the Automation or Marketing apps.
Create or Modify Flows with Data Graph Event Triggers	Allow users without the Manage Flow user permission to create, edit, and delete automation event-triggered flows with data graph change triggers 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.
Delete Flows	Allow users without the Manage Flow user permission to delete flows in the Automation or Marketing apps.
Run Flows	Allow users in the org to run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.
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

Name	Related Cloud or Feature
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
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.

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

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

Domain Setting	Usage	Description	Setup Location
My Domain	App URL and login pages	My Domain allows you to showcase your company's brand with a custom subdomain name in your Salesforce org login and application URLs.	**Salesforce Setup** > **Company Settings** > **My Domain**
Custom Domain	Landing pages	A custom domain gives further control over URLs that are visible to your customers. When you add a custom domain in , we recommend that you serve content with the Salesforce Content Delivery Network (CDN). 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`.	**Salesforce Setup** > **User Interface** > **Sites and Domains** > **Domains**
Tracking Domain	Email and SMS	A tracking domain monitors message opens and link clicks. The default tracking domain is owned by Salesforce, but you can configure a branded domain that your organization owns.	**Salesforce Setup** > **Unified Messaging** > **Email** > **Email Links**
Authentication (DKIM)	Email	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. DKIM authentication is required to send email with .	**Salesforce Setup** > **Unified Messaging** > **Branded Domain** > **Email Authenticated Domains**

Default Scoring System in Marketing Cloud

Leads, contacts, prospects, and accounts are scored based on the rules that you publish. You can use the default rules for both engagement and fit, or you can customize them to fit your needs. All engagement rules are available for the People and Accounts objects. Fit rules are available only for the object that they're listed under.

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

People Scoring

Rule Type	Condition Details	Value	Points
Engagement	Website Engagement | Engagement Channel Action | Is	error	-5
Engagement	Website Engagement | Engagement Channel Action | Is	form-submit	+10
Engagement	Website Engagement | Engagement Channel Action | Is	anchor-click	+3
Engagement	Website Engagement | Engagement Channel Action | Is	button-click	+3
Engagement	Website Engagement | Engagement Channel Action | Is	search	+3
Engagement	Website Engagement | Engagement | Engagement Channel Action | Is	page-view	+1
Engagement	Message | Engagement | Engagement Channel Action | Is	SUBSCRIBE	+5
Engagement	Message | Engagement | Engagement Channel Action | Is	CLICK	+3
Engagement	Message | Engagement | Engagement Channel Action | Is	UNSUBSCRIBE	-5
Engagement	Email | Engagement | Engagement Channel Action | Is |	CLICK	+3
Engagement	Email | Engagement | Engagement Channel Action | Is	UNSUBSCRIBE	-5
Fit	Contact Point Address | Country | Is	United States	+3

Account Scoring

Rule Type	Condition Details	Value	Points
Engagement	Account Contact | Activity Participant | Activity | Email Message | Is | Incoming | Is Equal To AND Account Contact | Activity Participant |Activity Participant Role | Is Equal To	• true • From	+50
Engagement	Party | Lead | Activity Participant | Activity | Email Message | Is | Incoming | Is Equal To AND Lead | Activity Participant | Activity Participant Role | Is Equal To	• true • From	+50
Fit	Account Type | Is Equal To	• Prospect	+30

Agents and Einstein Data Usage in

AI is built on data. When using Marketing Cloud, review this table to understand the type of data used by Marketing Cloud agents and Einstein features.

The table lists the Customer Data that is used, which is data submitted by the Customer to our services as defined in our Main Services Agreement (MSA, and the usage data that is used, which is data relating to users' interactions with Salesforce. Data submitted to an AI feature may be used to train AI models, to improve your services and features, or to develop new features that you can access without additional cost.

Product	Feature	Customer Data and Salesforce Objects Used	Generative AI MODEL Used	Global Model Used
Marketing Cloud: Growth Edition and Marketing Cloud: Advanced Edition	Agentforce	Campaign briefs, campaigns, subject lines, preheaders, and paragraphs, landing pages.	Yes	No
	Einstein Segment Creation	Segments in Data Cloud.	Yes	No
	Einstein Send Time Optimization	Engagement behavior (sends, clicks, opens, unsubscribes, spam complaints) and associated timestamps. Data and metadata about customer sending patterns and how campaigns are executed.	No	Yes (optional in Advanced Edition)

Product	Feature	Customer Data and Salesforce Objects Used	Generative AI MODEL Used	Global Model Used
	Einstein Metrics Guard	Email engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints). Data and metadata about customer sending patterns.	No	Yes
Marketing Cloud: Advanced Edition	Campaign Designer	Campaign briefs and campaigns.	Yes	No
	Einstein Engagement Scoring	Email engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints). Data, and metadata about customer sending patterns.	No	No
	Einstein Engagement Frequency	Email engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints). Data, and metadata about customer sending patterns.	No	No

Model Card: Einstein Metrics Guard

In , Einstein Metrics Guard analyzes how open events are calculated and the likelihood that each open event is real. The model focuses primarily on filtering emails through large-scale email providers that open messages before the customer opens them. Einstein Metrics Guard doesn't filter opens and clicks from email scanners on private, corporate email servers.

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

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.

Note: Customers that have Data Cloud One enabled and use Marketing Cloud Growth or Advanced edition operate from, store, and process customer data in the same location as the customer's Data Cloud home organization, without reference to companion organization locations.

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 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.

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.

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

Model Details

The 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 and Advanced Editions

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.

Note: Customers that have Data Cloud One enabled and use Marketing Cloud Growth or Advanced edition operate from, store, and process customer data in the same location as the customer's Data Cloud home organization, without reference to companion organization locations.

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 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.

Glossary

Here are the most common terms you encounter while using Marketing Cloud.

Audience	Any collection of people who can receive marketing, transactional, or operational content.
Campaign	A record that helps organize the audience, assets, and metrics for a specific marketing effort.
Campaign Flow	A container for the automated marketing activities that are related to a campaign.
Connector	A self-contained component that enables you to integrate third-party applications with Salesforce.
Consent	Indicates a person's willingness to receive promotional content from a business or organization.
Consent Status	Whether someone is opted in to receive email marketing.

Data Cloud	A platform that stores and consolidates large amounts of different data types. You can then use the data in other Salesforce apps.
Data Kit	A data kit contains specific Data Cloud objects, such as metadata, relationships, and other components, to streamline package creation and the installation process.
Data Model	A way to organize and standardize data elements and to add and edit data relationships.
Email	A content type that contains text and images and is distributed to email addresses.
Email Preference Center Page	The page where people can subscribe to and unsubscribe from your public lists.
Email Template	An email template is a reusable design that you can base new emails on. After you build a template, you can personalize the email for each recipient. You can also modify a template and limit what kind of changes users can make to the template.
Form	A content type that contains one or more fields for capturing data.
Identity Resolution	The process of matching multiple records to create a comprehensive view called a unified profile.
Identity Resolution Ruleset	The criteria used to identify and match related records, such as name or email address.
Landing Page	A content type that's hosted online and can contain text, images, or a form.
Segment	A group of unified individual IDs in Marketing Cloud that’s based on filtering rule criteria that you set.
SMS Message	A content type that contains only text and is distributed to subscriber phone numbers via the core messaging service.
Unification	The process of matching lead and contact records to create a unified individual record and make it available for segmentation.
Unified Individual	A consolidated record of multiple contact, lead, and prospect records associated with the same person.