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# Contact Builder Implementation Guide

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# CONTACT BUILDER IMPLEMENTATION GUIDE

The Contact Builder app provides access to contact data in your account and to the relationships designed to help you use that data. Use Contact Builder to manage, consolidate, organize, and link data from all Marketing Cloud apps and external sources.

## Who This Guide Is For

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This guide is for Marketing Cloud admins, partners, and developers to implement Contact Builder and configure specific features.

## Before You Start

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Contact Builder is available in all editions of Marketing Cloud. However, Email Studio does not leverage the contact model.

## Set Up Contact Builder

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Review this information and follow these steps to set up Contact Builder in your Marketing Cloud account.

## Contact Builder in Marketing Cloud Engagement

The Contact Builder app provides access to contact data contained within your account and the relationships designed to help you use that data. Use Contact Builder to manage, consolidate, organize, and link data from all Marketing Cloud Engagement apps and external sources.

- Enterprise resource planning (ERP) systems
- Customer relationship management (CRM) systems
- Point-Of-Sale (POS) systems

Contact Builder provides a single view of a customer that displays their interactions with your brand. You can use the collected information to personalize customer conversations at any size in any channel. That single view of the customer can contain the mobile number necessary to send SMS messages, the email address to send email messages, and the mobile device identification used for sending push messages. All associated address, subscription, and tracking information associated with activities and journeys relate back to that single contact record.

Contact Builder provides several tools used to manage contact data for use in building 1:1 relationships.

- Contacts Configuration—Determine how Contact Builder processes imported contact information.
- Data Designer—Define information about your contacts and relate that data directly to the contact record by linking data extensions.
- Data Extensions—Create and manage the data extensions that hold contact information.
- Imports—Create the processes that move contact information into your data extensions.
- Data Sources—Visualize where your contact data originates and assign attributes to those sources.

## Journey and Contact Data

Journey data preserves the state of a contact's data at the moment an entry event fires, facilitating the use of that data throughout a journey. Contact data captures the data values in the event source data extension at the time when Journey Builder evaluates it. Both are uniquely useful in journey creation.

Journey Data	Contact Data
Initial data value about a customer.	Current data value about a customer.
Provides attributes in the state they were in when the contact entered the journey.	Provides attributes in the state they are in when evaluation occurs after the entry event has fired.
Comprised of event data and activity data.	
Use when a contact is likely to exist in a journey more than once simultaneously.	
Use for comparison when a data value is expected to change.	

For some customer journeys, it's useful to filter against the initial data about a customer. That data value often qualifies the customer to enter the journey, even if it later changes. For example, the journey data about a customer shows that the first purchase was decaffeinated coffee. Even if the customer doesn't purchase that coffee again, you can use that data as a filter in a journey to market a new coffee.

For other journeys, it's necessary to filter against the most recent customer data. For example, the contact data about a customer shows a purchase of a new regular coffee flavor. This information is useful to filter against in a journey to market a sale on that flavor.

Journey data is the information about a contact that is brought in when the contact enters a journey. It's like a snapshot of the contact's attribute data at the moment the contact is added to the journey. Contact data is updated as the journey goes on, but journey data is not. Use the different types of data to present before- and after-data points in personalization strings or to detect changes in an attribute. You can use both journey data and contact data when filtering in entry events as well as decision splits and message personalization. Events can either be journey-specific or shared. Create a shared event in Entry Source Administration and use it in one or more journeys. The journey-specific event must be used in the journey within which it's configured.

## Create a Population in Contact Builder

Create a population in Marketing Cloud Engagement Contact Builder.

1. From Contact Builder, open Data Designer.
2. Click the arrow next to Create Attribute Group and select **Create Population**.
3. Follow the prompts to select a data extension in Contact Builder.


Use a data extension with a primary key value and link to the contact record on the Contact ID or Contact Key attribute. A population requires a 1:1 relationship. You can't link a data extension set as a population to an attribute set.

## Create an Attribute

Follow these steps to create an attribute in Contact Builder.

Create an attribute either directly on the contact record or within an attribute group.


1. To access data extensions you create, follow the directions in this step.
  - a. Click the Data Extensions tab.

- b. To edit and click the data extension name, navigate to the data extension.
2. To access data extensions or tables created by the system, such as MobileConnect Demographics or MobilePush Demographics, follow the directions in this step.
  - a. On the Data Designer page, click the attribute group containing the data extension or table to edit.
  - b. Click **View & Edit**.
  - c. Hover over the name of the data extension or table.
  - d. Click the  icon.
    3. Click **Create Attribute**.
    4. Enter a descriptive name for your attribute in the Attribute Name field.
    5. Select the data type for the attribute in the Data Type dropdown menu.
    6. To encrypt the data in the attribute, choose the Encrypt Data checkbox. After you add records to this attribute, you can't change the encryption setting.
    7. For text attributes, you can select different options to mask the values presented in the text. Choose the checkbox under the Type dropdown menu and select your masking options.
      - Mask all characters
      - Mask all except for first word
      - Mask all except for last character
      - Mask all except for last 4 characters
      - Mask all except for last word
    8. To assign a default value to an attribute, enter that value in the Default Value field. The default value must match the data type for the attribute.
    9. Select whether the attribute must contain a value for the contact using the **Required** and **Not Required** buttons.
    10. Click **Complete**.

## Data Extension Linking in Contact Builder

Link data extensions in Contact Builder to relate data in existing data extensions to either the contact record or another data extension. Start your process by linking at least one data extension to a contact record.

- Contact Builder prompts you to select a data extension to link to the contact record.
- Your available data extensions appear in the modal. Select the data extension you wish to link.
- With this step, you create your data model in an attribute group. To most effectively organize your data, select and link all data extensions that contain information about the specified topic.

 **Tip:** The word 'Contact' is a reserved word. As a result, you can't link a data extension called 'Contact' to an attribute group in Data Designer.

 **Tip:** Data Designer doesn't support linking data extensions with non-GSM characters.

## Select Cardinality

When linking data extensions, you must select the cardinality of the relationship. You can specify one-to-one, many-to-one, or many-to-many relationships. These relationships define how attributes within the data extensions relate to each other.

## Link Attributes

Link attributes by selecting an attribute from the contact record and the data extension to link. You must select attributes with the same data type, but you don't have to select attributes with the same name.

After you link at least one data extension to the contact record, link all data extensions related to the attribute group. You can link subsequent data extensions to the contact record or to other data extensions to build complex relationships.

- To view and edit relationships between data extensions, hover over the link icon.
- to link and edit your data extensions, hover over the slide-out menu. You can also remove the data extension from the data model without deleting the data extension.

You can also use events to bring behavioral information into Contact Builder. This information can help you segment and better target marketing activities toward your contacts.

## Data Source Creation in Contact Builder

Data Sources establish where the data contained within Contact Builder originates. You can assign attributes to these data sources and view precisely how data enters your account and how you can best use that data.

Contact Builder includes synchronized and custom data sources. Synchronized data sources enable access to data from other Salesforce clouds. Custom data sources help you identify other external sources of data.

Use the Data Extension screen to access and manage data extensions within Contact Builder.

## Data Import

You can import contact data into Marketing Cloud Engagement. You can also save and reuse import definitions that bring information into Contact Builder.

To ensure compliance with corporate privacy policies and government regulations, you can choose to mask or encrypt data. Masking prevents data from displaying to other Engagement users. Encryption encrypts all data stored in Engagement.

Contact your account executive for more information about enabling these features.

## Contact Builder Access

A Marketing Cloud Engagement admin can restrict which Marketing Cloud Engagement users can access Contact Builder.

Modify the user permissions for each user to determine their level of access.

- Access—User can access the Contact Builder app
- View All Contacts—User can view contact information in Contact Builder
- Delete Contacts—User can delete contact records from Contact Builder
- Administer Contact Data Model—User can change data relationships for attributes groups and other entities in Contact Builder



## Contact Deletion in Contact Builder

To remove contact information from Marketing Cloud Engagement for any reason, including compliance regulations, delete contacts from Contact Builder. This feature applies only to contacts in Email Studio - All subscribers, MobileConnect, MobilePush, and Contact Builder.

### Enablement

Enable Contact Delete for your account in the Contact Configuration section of Contact Builder. For Enterprise 2.0 accounts, enablement occurs at the parent account level for the entire organization.

When enabled, this feature operates differently for different types of tenants.

- Enterprise 2.0 accounts require deletions to originate from the parent account.
- Lock-and-Publish accounts isolate deletions to that account, no matter which accounts exist in the larger structure.
- On-Your-Behalf accounts require deletions to originate in the parent account and cascade to child accounts.
- Agency and Agency Client accounts isolate deletions to that account, no matter which accounts exist in the larger structure.


All contact deletion processes are final, and Engagement can't restore deleted contact information.

### Process

The process includes a 2-day default period where Contact Builder suppresses contact information from showing in channel apps such as Email or MobileConnect. You can change the length of this time period in your account. The information remains in your account, but you can't view contact records or access it for send activities. After the period elapses, we delete contact information for deleted contacts from lists and sendable data extensions. This process doesn't apply to any non-sendable data extensions not included in a population via Data Designer. You're responsible for deleting applicable information from those sources on your own.



- Deletion process initiated
- Suppression period—Contact information remains in your account, but you can't view or access it
- Final deletion—Engagement removes deleted contact information from your account

 **Note:** If you delete a contact using Contact Delete in Contact Builder, we remove all contact information from all your sendable data extensions in your account. This removal includes any tracking or preference information. If this contact is added back into Contact Builder at a later time, the record receives a brand new unique ID and doesn't retain any of the previous contact record's information.

## MobileConnect and MobilePush Contact Deletion

By deleting this contact, you also delete all opt-out preferences associated with that contact. As a result, if you reintroduce this contact into Engagement, previous opt-out preferences stored for this contact aren't reinstated. If you reimport the contact, you must also import the contact's opt-out status or that information is lost. Ensure that you receive express permission to send messages to an individual before you import or reimport the contact into Engagement. Honor the individual's prior opt-outs, and confirm that your messaging complies with all applicable laws.

It's assumed that all MobilePush contact deletions are associated with a compliance deletion based on GDPR or other regulatory requirements. The MobilePush SDK and platform restrict future push notification registrations from that contact's specified mobile device. To reestablish themselves as a contact, the contact must delete and reinstall the mobile app on their device.

If a contact texts a STOP keyword on a valid code, they receive a stop confirmation message if one is configured, and their subscription status isn't changed. Prevent returning a response to STOP requests by selecting the Suppress STOP response option in the administration section in MobileConnect.

## Synchronized Data Sources Contact Deletion

For Synchronized Data Sources, delete the information from the original data source in Sales Cloud, Service Cloud, or another cloud. This action deletes the corresponding record in the Synchronized Data Extension, but it doesn't delete the contact record from Engagement.

## Contact Builder Use Case

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This use case demonstrates an effective process to set up Contact Builder in your Marketing Cloud account.

### Use Contact Data in a Journey

To use contact data in a Marketing Cloud journey, create a population and link an orders data extension.

This example uses a master subscriber data extension and an orders data extension that is common in retail settings. The master subscriber data extension contains contact information, and the orders data extension contains information related to previous and current orders made by those contacts. Both data extensions contain a CustomerID field used to identify contacts.

1. In Marketing Cloud, click **Audience Builder** and select **Contact Builder**.
2. Click **Data Designer**.
3. Click **Populations**.
4. Click **Create Population**.
5. Select the subscriber master data extension.
6. Relate the SubscriberKey field to your ContactKey field, and click **Create**.

7. Click **Data Designer**.
8. Click **Create Attribute Group**.
9. Choose a name and icon for your attribute group.
10. Click **Create**.
11. Click **Link Data Extensions**.
12. Select the population you created for the first entity. Select the orders data extension for the second entity.
13. Link the CustomerID field in the data extensions.
14. Click **Save**.

Use this data model to build out journeys and execute decision splits.

## Contact Builder Best Practices

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Contact Builder helps you maintain the contact information you use to identify individual contacts across multiple channels and personalize messaging and marketing activities. To ensure that your marketing activities function, make sure that all contact information relates to a single contact record.

### Use a Single Contact Key

Contact Builder uses a single contact key value to identify a contact within a Marketing Cloud Engagement account. This value is identical to the subscriber key in Email Studio. Use the contact key value to assign information from several communication channels, such as mobile numbers and email addresses, to a single contact record. Follow these best practices to implement a unique contact key for each contact:

- Use a unique value that doesn't relate to a specific channel. If you import a value from an external data source, use a string-based field, even if the external data source uses a number as the unique identifier. If you use your Engagement account to gather data, consider using a GUID or other generated ID in a string field as the contact key value.
- Use a contact key value that doesn't change based on customer behavior. For example, a physical address makes a poor contact key value, as it can potentially apply to several people or change frequently.
- To maintain consistent contact information and implementation, use the subscriber key value in Email Studio as your unique contact key value in Contact Builder.
- When taking your information from an external information source, use the unique identifier from that system as your contact key to ensure consistent data imports. If your unique customer identifier is a numerical value, use string-based field for the contact key when you create the data extension with information from the external data source.
- Contact key values can't contain these characters.

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## Find Consistent Information to Tie Potential Duplicate Contact Records Together

You can't merge or de-duplicate contact information in Engagement. Therefore, you can see a contact that is represented twice within the system. For example, a contact includes an email address in Email Studio and a separate device ID in MobilePush. Use another demographic value to help de-duplicate this contact via an external service or partner. Elimination of duplicate records keeps your contact count lower and reduces billing costs and maintains the integrity of a unique contact record for marketing activities.

## Understand the Difference Between All Subscribers and All Contacts Lists

The All Contacts list includes all contacts in an Engagement instance. The All Subscribers list specifically refers to subscriptions created within Email Studio. Email Studio references the All Subscribers list to prevent sends to unsubscribed email addresses. However, this action applies only to Email Studio information and activities. A contact can unsubscribe from a subscription in Email Studio and still receive messages from other apps, such as MobileConnect or MobilePush.

By default, Contact Builder uses a different demographic source of information for each channel. The different demographic attribute groups displayed in Contact Builder contain this information. However, the unique contact key value used to identify a specific contact remains consistent for all channel apps. To use a single set of demographic information for all channels, create an attribute group in Contact Builder. Use that group as the source of information for your marketing activities. Make that attribute group available to all necessary users and copy to other business units within your account.

## Understand the Contact Record Deletion Process

To honor opt-outs, we don't delete contacts in most situations. While you can delete contacts related to Email Studio from Marketing Cloud Engagement, this deletion doesn't totally remove their information from Engagement. We retain this information to ensure that the appropriate email addresses don't receive messages from which they unsubscribed.

## Change ID Number Data Type Before Linking to Contact Key

If you use a numeric value to identify individual contacts, change that data type to a string data type before linking that value to Contact Key. You can't directly link numeric values to Contact Key. For best performance, change the data type for your numeric identifiers before importing contact information into Contact Builder. Do not link numeric identifiers and the CustomerID value because this activity can cause performance issues.

## Link Attribute Groups and Populations Using Contact Key When Possible

Link attribute groups and populations using the contact key value. Don't link using an email address field when the Contact Key or Subscriber Key value is available. If you must create a link using the email address, create a text attribute containing the email address and link using that value.

## Understand the Differences Between Contact ID and Subscriber ID versus Contact Key and Subscriber Key

These system fields don't serve the same purpose in Marketing Cloud Engagement.

Most customers use a primary identifier for their customers and link their identifier to Engagement using the Engagement Contact Key or Subscriber Key value.

The Contact ID and Subscriber ID fields act as surrogate keys used by internal Engagement systems. You can see these fields in tracking extracts and system data views in Query Activities. To avoid performance issues, don't use these values for Engagement activities.

## Limit Populations to Three Entities

Use populations to create large and distinct subgroups of your contacts, then segment contact records from there. For example, a doctor's office creates populations for staff, for patients, and for vendors. If you create populations in your account, limit those populations to three or fewer to improve performance.

## Contact Delete Best Practices in Contact Builder

Apply these best practices to implement Contact Delete. All contact deletion processes are final, and Marketing Cloud Engagement can't restore deleted contact information.

- Contact Delete removes contact information across the entire enterprise for Enterprise 2.0 accounts.
  - This deletion affects all business units that share ClientID value as the MID of the account that initiated the deletion.
  - If you use multiple Enterprise 2.0 accounts, perform the Contact Delete process for each account. The deletion process requires more time to remove contact information across a large number of business units.
  - Child business units can include contact records created by triggered sends, data operations such as queries or filters, or Synchronized Data Sources. Delete those records using the child business unit MID in your request.
- Use ContactKey or ContactID values to delete contacts.
- If you linked multiple SubscriberKey or ContactKey values to a contact record, perform the Contact Delete process for all values.
- To request the status for a single contact, use an API request. For large batches of deletions, the suppression status shows for contacts when the entire batch processes.
- To improve Contact Delete performance, break your requests into at least six smaller requests, and submit each request 5 minutes apart.
- Data extension data-retention policies don't ensure regulatory compliance. Use both Contact Delete and data retention policies to help ensure full removal of data.
- We recommend setting data retention policies for a data extension when you first create it. You can apply data retention policies to new and existing data extensions. However, data extensions with more than 100 million records can't accept retroactive data retention policies.
- You can't reintroduce a contact that is in suppression or in the process of being deleted after the suppression period is over. During this time you can't perform any sends, including transactional sends, to that contact.

- To more quickly remove contact information from your account, set the suppression period length to 0. Then, the delete request is immediately eligible for processing. Deletion begins when the system has identified all the related contact data.
- The deletion process yields to other account activities, such as sending, imports, automations, and query activities. These processes take precedence over deletions. As more activities run in the account, the deletions require more time.
- The deletion process scans all sendable data extensions in an account to remove the specified contact records. To improve the speed of this process, delete any unnecessary sendable data extensions in your account.
- Export any list or data extension to a backup file before you delete anything, so that you can restart the contact delete process if there's an error.
- You can delete up to one million records.