



Account Engagement: Data Cloud Integration Implementation Guide

Salesforce, Spring '24



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USE DATA CLOUD SEGMENTS IN ACCOUNT ENGAGEMENT

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

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

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

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

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

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

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

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

When Account Engagement fields are added to the data streams, you can map them to Data Cloud Data Model Objects (DMO) to use in segments.

[Create a Segment in Data Cloud](#)

Create a segment in Data Cloud using Account Engagement data.

[Create a Dynamic List from a Data Cloud Segment](#)

After you add the custom field to the Data Model Object (DMO) and map your fields, you can create a dynamic list in Account Engagement to pull in your Data Cloud segment. You can have up to five dynamic lists per business unit and up to one million prospects per list.

Connect Account Engagement Business Units to Data Cloud

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

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

You can only connect the business units that are associated with your Data Cloud Salesforce org. You can also add or remove business units later.

EDITIONS

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

USER PERMISSIONS

To configure Data Cloud:

- Customer Data Cloud Admin

Add Additional Account Engagement Fields to Salesforce CRM Data Streams

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

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

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

EDITIONS

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

USER PERMISSIONS

To configure Data Cloud and edit Data Streams:

- Data Cloud Data Aware Specialist

To edit permission sets:

- Salesforce Admin

Map Data Streams to Data Model Objects

When Account Engagement fields are added to the data streams, you can map them to Data Cloud Data Model Objects (DMO) to use in segments.

A Data Cloud Data Aware Specialist performs these steps.

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

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

5. To create a mapping connection, select the DLO field to map and click the related DMO field. A confirmation appears with an arrow connecting the fields.
6. To pull Data Cloud segment membership into Account Engagement, create a custom field in your DMO with these values and map the Contact ID to that field.
 - a. Name: Account Engagement Integration ID
 - b. Field API Name: Account_Engagement_Integration_ID
 - c. Data Type: Text
7. Save your work.
8. Repeat these steps for the Lead data stream.

SEE ALSO:

[Data Mapping](#)

Create a Segment in Data Cloud

Create a segment in Data Cloud using Account Engagement data.

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

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

1. In Data Cloud, click **Segments**.
2. Click **New**.

An activation target isn't required when you create a segment in Data Cloud for Account Engagement. The warning that displays when you publish without an activation target doesn't apply if the segment is for Account Engagement.

3. From the Data Space dropdown, select the default data space.
You can use only the Data Cloud segments in your default Data Space.

EDITIONS

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

USER PERMISSIONS

To map Account Engagement to Data Cloud:

- Data Cloud Data Aware Specialist

USER PERMISSIONS

To create segments in Data Cloud:

- Data Cloud Marketing Manager OR Data Cloud Marketing Specialist

4. From the Segment On dropdown, select the DMO that your segment is built on.
5. Give your segment a unique name that's easily identifiable, and click **Next**.
6. Choose a Publish Type, and schedule when to publish your segment to the activation targets.
We recommend selecting **Don't Refresh** until you have defined rules for your segment.
7. Click **Save**.
8. Drag attributes from the library onto the segment canvas to set filter criteria for your segment.
You can place each attribute in its own container or combine it with other attributes in the same container to create an AND or an OR relationship between the attributes.
9. Save your work.
10. On the segment details page, click **Edit Properties** to set a publish schedule for your segment or click the dropdown menu and select **Publish Now**.
Only published segments are available to use in Account Engagement dynamic lists.

Create a Dynamic List from a Data Cloud Segment

After you add the custom field to the Data Model Object (DMO) and map your fields, you can create a dynamic list in Account Engagement to pull in your Data Cloud segment. You can have up to five dynamic lists per business unit and up to one million prospects per list.

1. Open the Lists page.
 - In Account Engagement, select **Marketing > Segmentation > Lists**.
 - In the Lightning app, select **Prospects**, and then **Segmentation > Segmentation Lists**.
2. Click **+ Add List**, and name the list. We recommend using a similar name as the Data Cloud segment you connect the dynamic list to.
We recommend using a similar name as the Data Cloud segment that you're connecting the dynamic list to.
3. Select **Dynamic List**.
4. From the Dynamic List Type dropdown, select **Data Cloud segment**.
5. From the Data Cloud Segment dropdown, select a Data Cloud segment from the default data space.
In Account Engagement, you can use only published segments with a dynamic list. You can connect a segment to only one dynamic list per business unit at a time.
 - Only published segments are available to use with dynamic lists in Account Engagement.
 - A segment can be connected to only one dynamic list per business unit at a time.
6. Click **Create List**.

A new dynamic list can take up to 3 hours to populate the first time it's connected to a Data Cloud segment. A dynamic list can take up to 1 hour to update after a Data Cloud segment is refreshed.

EDITIONS

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

USER PERMISSIONS

To add segments to a dynamic list in Account Engagement:

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

Data Cloud segments and Account Engagement dynamic lists update automatically based on criteria. We recommend monitoring your segments and dynamic lists over time so that you can adjust your criteria as needed.

SEE ALSO:

[Create a Dynamic List](#)