Implementation Guide: Marketing Cloud Next

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Manage Your Marketing App

Salesforce admins, marketing admins, and admins for Data 360 have a role to play in configuring and managing Marketing Cloud Next. Before you get started, determine whether one user fills these admin roles or if many people are involved.

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- Getting Started with Marketing Cloud Next Setup

To get started with Marketing Cloud Next, 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.

- Configure Your Marketing Data

One of the things that makes Marketing Cloud Next so powerful is its relationship to Data 360. To prepare your Salesforce org, 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.

- 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 Next.

- Set Up Channels in Marketing Cloud Next

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

- Ensure Compliance with Consent Settings

Marketing Cloud Next 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.

- Configure Web Tracking for Marketing

Track visitor activities and engagement across your marketing landing pages and external sites. Use the data to create more targeted segments and inform your marketing strategy.

- Set Up Reporting in Marketing Cloud Next

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

- Score People and Accounts in Marketing Cloud Next

Score leads, contacts, prospects, and accounts based on how engaged they are with your marketing efforts, how closely they resemble your ideal customer, or 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.

- Enable AI Features in Marketing Cloud Next

Marketing Cloud Next 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 that best fit the needs of your business.

- Recommended Page Customization

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

- Set Up a Sandbox in Marketing Cloud Next

A sandbox is a copy of your Salesforce org that you can use for development, testing, and training without compromising the data and apps in your production org. Marketing Cloud Next supports every sandbox type: Developer, Developer Pro, Partial Copy, and Full Copy.

- Helpful Resources

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

Getting Started with Marketing Cloud Next Setup

To get started with Marketing Cloud Next, 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.

View supported editions.

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

Note: If you are a Marketing Cloud Engagement user transitioning to Marketing Cloud Next, see Get Started with Marketing Cloud Next for Engagement.

Prepare for Setup

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

Salesforce admin (System Administrator profile)	A Salesforce admin has permissions to complete tasks in Salesforce Setup, which you can access by clicking on any page.
Data Cloud Architect	A Data Cloud Architect has permissions in Data 360 Setup and on other data modeling objects. To add this critical infrastructure to your org, a Marketing Cloud Next admin must install data kits and deploy data streams. These 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 Next setup assistant guides you through the required and recommended tasks. 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 Setup checklist.

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

Enable Marketing Cloud Next

Estimated time: Up to 15 minutes

On the Basic Settings page, review the list of required tasks. Most of these tasks begin automatically when Salesforce adds functionality to your org. After each task is complete, click to enable Marketing Cloud Next, and then start the automated process of connecting the necessary content and privacy tools.

To successfully complete all of the prerequisites, you must first enable Data 360. If you run into issues, here are some troubleshooting notes for each task.

Step	**Troubleshooting notes**
Enable Data 360	In the App Launcher, search for and select **Data 360**. Click to access Data 360 Setup and enable it. A Data Cloud Architect is required to complete this process.
Create a Salesforce CRM connector	In Data 360 Setup, open the Connectors page, and click **New**. Select Salesforce CRM and follow the prompts. A Data Cloud Architect 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 360 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.

Note: To use these content tools with Government Cloud, manually enable the content delivery network. See Marketing Cloud Next in Government Cloud.

Complete the Basic Settings and Continue Setup

Estimated time: Variable

Next, install the data kits and configure your identity resolution rulesets. These tasks are on the same Basic Settings page where you enabled Marketing Cloud Next.

The remaining pages of 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 Next, like activating AI features or customizing your domain.

Configure Your Marketing Data

One of the things that makes Marketing Cloud Next so powerful is its relationship to Data 360. To prepare your Salesforce org, 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.

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

For complete instructions, see Install and Deploy Data.

Setup Label	Package Name	Details
Marketing Setup Objects Data Kit	Marketing Cloud Consent Objects	Contains two data bundles, MarketingSetup_General and SMSAddOn_General. The SMS bundle is required only when using the SMS add-on.
Consent Objects Data Kit	UnifiedMessagingConsent	Contains ConsentAuditTrail and MessagingConsent data streams.
Flows Integration Data Kit	Salesforce Data 360 - 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 360 Setup.

- Deploy Data Kits for Marketing Cloud Next

Data kits contain the objects, fields, and data connections that make Marketing Cloud Next work. Marketing data kits are required for all Marketing Cloud Next users, but the sales data kit is optional based on how you manage your CRM data.

- Configure Identity Resolution Rulesets for Marketing Cloud Next

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 360 can organize related and duplicate data into unified individual records that marketers can use to target audiences.

Deploy Data Kits for Marketing Cloud Next

Data kits contain the objects, fields, and data connections that make Marketing Cloud Next work. Marketing data kits are required for all Marketing Cloud Next users, but the sales data kit is optional based on how you manage your CRM data.

View supported editions.

User Permissions Needed	
To deploy data kits in setup:	System Administrator profile AND Data Cloud Architect AND Marketing Cloud Admin permission sets
To deploy data streams manually:	Data Cloud Architect permission set

Here are some things to consider before you deploy data kits in Marketing Cloud Next.

- Before you deploy data kits, make sure that each step in the Enable Marketing Cloud section is complete. You can resolve some issues on your own, but some errors require that you contact Salesforce Customer Support. See Setting Up Your Marketing App.
- Data streams consume Data 360 credits based on the amount of batch data that's processed. See Data 360 Billable Usage Types.
- If you're setting up Marketing Cloud Next in a Data 360 One companion org, the data kits are deployed in the home org.
- When an update is available for a data kit, we notify you to return to the Basic Settings page and redeploy it.

Deploy or Update Required Marketing Data Kits

You can quickly deploy or update all the required marketing data kits with one click. If you're deploying for the first time, the CRM and ingestion data streams for all the listed data kits are deployed in Data 360. If you're updating, the data kits with changes are redeployed.

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

The status of each data kit and its related data streams is shown, so you can confirm that they're deployed successfully. This process takes a few minutes. To learn how to deploy a data stream manually, see Manually Deploy the Updated Data Streams.

Deploy or Update the Sales Data Kit

The optional Sales data kit ingests Salesforce CRM data from your accounts, contacts, leads, and opportunities. It's the fastest path to building Identity Resolution rulesets and enabling features that track engagement, because it saves you from mapping those objects yourself.

If you manage customer identity outside of Salesforce, or want more control over which CRM data to bring into Data 360, you can skip deploying the sales data kit. If you don't deploy the sales data kit, certain features like reporting dashboards require extra configuration. Opportunity Influence requires the sales data kit.

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

The page shows the status of the sales data kit, so you can confirm that it deployed successfully.

Configure Identity Resolution Rulesets for Marketing Cloud Next

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 360 can organize related and duplicate data into unified individual records that marketers can use to target audiences.

View supported editions.

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

Identity resolution rulesets consume Data 360 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 360 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 360.

Generate a Ruleset for the Individual Object

When you generate a ruleset for the Individual object, it uses Normalized Email, Lead to Contact, and Device to Known as match rules. Lead to Contact prevents duplication when leads become contacts, and Device to Known matches web visitors to known profiles.

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.

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.
      If your ruleset is for the Individual object, add the recommended rules to the ruleset.
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 the Individual Object 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 Next landing pages or a connected external site, add a rule that attributes activity to the correct unified individual. If you generate a ruleset for the Individual object after the Winter '26 release, these rules are included by default.

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 Next.

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

- Assign Permission Sets for Marketing Cloud Next

After you set up data streams, create users and assign permissions. To make sure that users have access to the right objects and features, use the Marketing Cloud Admin or Marketing Cloud Manager permission sets. You can assign permission sets to individual users or assign them in bulk.

- Turn On the Privacy Preference Manager Tab for Marketers

To allow users to edit the default email preference page or to access Preference Manager tools in the Marketing app, turn on the Privacy Preference Manager tab. Edit the Standard User Profile to make the tab Default On.

- Add Workspace Contributors to Marketing Cloud Next

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

- Add Site Contributors to Marketing Cloud Next

To let users preview landing pages in Marketing Cloud Next 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.

- Set Up Identity-Licensed Users in Marketing Cloud Next

Identity-licensed users can access Marketing Cloud Next using Salesforce single sign-on. You can assign Identity-licensed users 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 Next, and then assign the profile to new users.

Assign Permission Sets for Marketing Cloud Next

After you set up data streams, create users and assign permissions. To make sure that users have access to the right objects and features, use the Marketing Cloud Admin or Marketing Cloud Manager permission sets. You can assign permission sets to individual users or assign them in bulk.

View supported editions.

User Permissions Needed	
To assign permission sets:	Assign Permission Sets system permission OR Marketing Cloud Admin permission set

Assign Permissions to a Single User

You can add or remove permission set assignments from an individual user profile.

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**.
   - To assign a permission set, select it under Available Permission Sets, and then click **Add**.
   - To remove a permission set assignment, select it under Enabled Permission Sets, and then click **Remove**.
4. Save the permission set assignment.

Assign Permissions in Bulk
Assign the same permission sets to multiple users from the Permission Sets page in Setup.

1. From Setup, in the Quick Find box, enter `Permission`, and then select **Permission Sets**.
2. Select a permission set, and then click Manage Assignments.
3. Click **Add Assignments**.
4. Select users to assign the permission set to, and then click **Assign**.

Turn On the Privacy Preference Manager Tab for Marketers

To allow users to edit the default email preference page or to access Preference Manager tools in the Marketing app, turn on the Privacy Preference Manager tab. Edit the Standard User Profile to make the tab Default On.

View supported editions.

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 Next

When marketers create content in Marketing Cloud Next, 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.

View supported editions.

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 the Marketing app, go to the Content tab and open your workspace.
2. Click ⚙, and then 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 Next

To let users preview landing pages in Marketing Cloud Next 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.

View supported editions.

User permissions needed	
To add contributors to a site:	System Administrator 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. Only Salesforce admins can add themselves as site contributors.

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 Next

Identity-licensed users can access Marketing Cloud Next using Salesforce single sign-on. You can assign Identity-licensed users 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 Next, and then assign the profile to new users.

View supported editions.

User Permissions Needed	
To add users:	Manage Internal Users

User Permissions Needed	
To create and edit profiles:	Manage Profiles and Permission Sets

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 Intelligence 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.

Set Up Channels in Marketing Cloud Next

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

View supported editions.

- Configure Required Email Settings

To send emails, 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 can transfer email sending capabilities to Marketing Cloud Next.

- 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.

- Set Up SMS Messages in Marketing Cloud Next

When you have the SMS messaging add-on, you can create and send SMS messages from Marketing Cloud Next. 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.

- Set Up WhatsApp in Marketing Cloud Next

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

- Set Up Mobile App Messaging in Marketing Cloud Next

In Marketing Cloud Next, you can use segments and Flow Builder to send timely, personalized notifications to users of your apps. To start sending mobile app messages, add and configure your app in Setup.

- Set Up Custom Mobile App Events in Marketing Cloud Next

Track user behavioral interactions like button clicks, screen views, or purchases within your mobile app.

Configure Required Email Settings

To send emails, 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 can transfer email sending capabilities to Marketing Cloud Next.

View supported editions.

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 Marketing Cloud Next. 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.

A complete physical address, including an alphanumeric value in the State field, must be included in every marketing email that you send. If your business address doesn't use a state, region, or province name, insert a placeholder. For orgs that use a region picklist, add a placeholder to the picklist first, and then select the placeholder from the dropdown menu.

- 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.

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 for Service Cloud AND Enterprise and Unlimited Editions with Marketing Cloud Next **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 for Service Cloud AND Enterprise and Unlimited Editions with Marketing Cloud Next **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 Next

When you have the SMS messaging add-on, you can create and send SMS messages from Marketing Cloud Next. 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.

View supported editions.

These requests include all the information that you must 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 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

In the United States and Canada, you can now procure short codes by using the self-service procurement process. 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 Next

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

View supported editions.

Note: WhatsApp messaging isn't supported in Government Cloud. See Marketing Cloud Next in Government Cloud.

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.
   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 Intelligence to get metrics about your new channel.
- Begin crafting WhatsApp campaign content.

Set Up Mobile App Messaging in Marketing Cloud Next

In Marketing Cloud Next, you can use segments and Flow Builder to send timely, personalized notifications to users of your apps. To start sending mobile app messages, add and configure your app in Setup.

View supported editions.

The Your Apps page in Setup shows the apps that are associated with your account. This table describes the information shown for each app.

Label	Description
Application Name	The name associated with the app.
Sending Services	The mobile app notification services that are configured for the app. Possible values are iOS and Android.
Status	Indicates whether the app is active. An app becomes active when at least one sending service is configured. You can only send messages through an active app.
Active Users	The number of active users of the app who have opted in to receive messages.
Created	The date when the app was added to your account.
Created By	The name of the user who added the app to your account.
Last Modified	The date when the app was last modified.

Add Your App

1. In Setup, go to **Unified Messaging** > **Mobile App** > **Your Applications**.
2. Click **Add Application**.
3. On the Add Application window, click **Next**.
4. For **Application Name**, enter a name.
5. Click **Next**.

After you create the app, configure at least one sending service.

Configure iOS Settings

If your application has a version that runs on Apple iOS, configure the settings for Apple Push Notification service (APNs).

1. On the Sending Services tab, expand the iOS section.
2. For Environment Type, choose whether to use a **Production** or **Sandbox** environment.
3. For Key Type, choose whether to use an **APNS p8 Auth Key** or an **APNS p12 Auth Key**.
4. Click Upload Files, and then upload your APNs certificate file.
5. For Key ID, enter your key ID.
   For more information about finding your key ID, see *Apple Developer*: Get a key identifier.

6. For Team ID, enter your team ID.

   To find your Team ID, sign in to your Apple Developer account and click **Membership details**.
7. For Bundle ID, enter the bundle ID associated with your app. The bundle ID is an alphanumeric string that uses reverse DNS notation, such as `com.northerntrailoutfitters.app`.
8. Save your changes.

Configure Android Settings

If your application has a version that runs on Android devices, configure the settings for Firebase Cloud Messaging (FCM).

1. On the Sending Services tab, expand the Android section.
2. Click **Upload Files**, and then upload your Firebase Developer certificate.
3. Save your changes.

(Optional) Configure Category Names for iOS Carousels

If you plan to use create carousel messages for iOS devices, specify a category name. Specifying your category names helps ensure that your messages render correctly. When you create a carousel message template, you provide the category name.

1. On the Categories tab, for iOS Carousel Category Name, enter a unique name.
2. Save your changes.

Test Your App's Configuration

After you create an app in Setup and add the Engagement SDK to your app, perform a test to make sure that the app is properly configured.

1. On the Your Apps page in Setup, from the list of apps, select an app to test.
2. On the Test tab, for **Select Identifier**, select the type of identifier to use to send a test message. Choose from these options:
   - **System Token**: Send a message to a recipient based on their unique, device-generated token.
   - **Device ID**: Send a message to a specific device based on its unique device ID.
   - **Individual ID**: Send a message to a subscriber based on their Unified Individual ID in Marketing Cloud Next.
3. Specify the unique ID for the type of identifier you selected.
   - If you selected System Token, select the operating system of the target device, and then enter the token in the **System Token** field.
   - If you selected Device ID, enter the target device ID in the **Device ID** field.
   - If you selected Individual ID, enter the target device ID in the **Individual ID** field.
4. Click **Test Configuration**.

The Results section on the right side of the page indicates whether the test was successful. If the test fails, verify that you provided the correct credentials for the push notification services.

Turn On Flash Sending

Turn on flash sending to send notifications to your users' screens for their immediate attention. Flash sending functions at scale with minimum delay.

1. On the Your Apps page in Setup, from the list of apps, select an app.
2. Enable flash sending.

Create Custom Attributes

Custom attributes are data fields defined for a specific mobile app. Use them to store app-specific data and define audiences for flash sending. Once activated, you can't edit or delete them.

1. On the Your Apps page in Setup, from the list of apps, select an app.
2. On the **Custom Attributes** tab, click **New Attribute**
3. Enter a field label to show on displays, page layouts, reports, and list views.
4. Specify a field API name that's unique across all mobile apps.
5. Enter a length for the associated data type.

   All custom attributes use the Text data type.
6. To save the attribute without activating it, click **Save.** To make the attribute available, click **Activate.**

Activation can take a few minutes, and you can activate only one attribute at a time. To check the status, click the refresh icon.

Define Audiences for Flash Sending

Send flash messages to specific mobile devices using audiences based on custom attributes. Create your attributes first, then enable flash sending to publish an audience. You can't edit published audiences, but you can deactivate or delete them.

1. On the Your Apps page in Setup, from the list of apps, select an app.
2. On the Flash Sending tab, in the Audiences section, click **New Audience.**
3. Enter a unique audience name.
4. Select a custom attribute.
5. Specify the value that a device's custom attribute matches to be included in the audience.
6. To save the audience without publishing it, click **Save as Draft.** To publish the audience so that marketers can use it, click **Save & Publish.**

Marketers can select a published audience in a flow when they configure a flash message.

Configure In-App Message Display Limit

Restrict the number of in-app messages to show across campaigns and flows in a session. This restriction ensures a positive user experience and maximizes the effectiveness of each message.

1. On the Your Apps page in Setup, from the list of apps, select an app.
2. On the In-App Messaging tab, enable the display limit.
3. Enter the maximum number of messages to show in a session.
4. Enter the minimum time between messages and its time unit.
5. Save your changes.

Set Up Custom Mobile App Events in Marketing Cloud Next

Track user behavioral interactions like button clicks, screen views, or purchases within your mobile app.

View supported editions.

Note:

Custom mobile app events aren't supported in Government Cloud. See Marketing Cloud Next in Government Cloud.

Custom mobile app events are available only in Marketing Cloud Next instances hosted in Germany and the United States. If you aren't sure which region your instance is hosted in, contact your account executive.

The Your Events page in Setup shows the custom mobile app events that are associated with your account. This table describes the information shown for each event.

Label	Description
Event Name	The name of the event.
Description	The description of the event.
Application	The app associated with the event.
Attributes	The number of attributes associated with the event.
Status	Indicates whether the event is active.
Created	The date when the event was added to your account.
Created By	The name of the user who added the event to your account.
Last Modified	The date when the event was last modified.
Last Modified By	The user who last modified the event.

Create a Custom App Event
Marketers can stream the event in real time from a mobile app via the unified Marketing Cloud SDK. Leverage this data in Data 360 for segmentation and deeper insights, or in Flow Builder to create personalized customer journeys.

You can't delete attributes after you activate your event, so make sure to review them first.

You can't delete an active event. You can deactivate it if you don't want to use it anymore, but you can still reuse its attributes in other events, and reactivate it later.

Each custom event name and attribute is case-sensitive. Make sure to use the exact case at all times, from creation and tracking via the SDK to referring the data in Data 360 and using the event in scenarios like display triggers in in-app messages.

The custom event data is stored in the Device Application Engagement data management object (DMO) in Data 360. Each new attribute creates a new field in the DMO. The maximum number of unique attributes per org is 800, so reuse existing attributes across multiple events instead of creating new ones. For example, most events use attributes like Name and User ID.

1. In Setup, go to **Unified Messaging** > **Mobile App** > **Your Events**.
2. Click **New Event**.
3. On the New Event window, enter an internal name and description for the event.
4. For Application, select the app associated with the event.
5. Add attributes to the event.
   - To create an attribute, click **New Attribute**. Enter the attribute name and select a data type for the attribute. Choose whether the attribute requires a value.
   - To add existing attributes, click **Add from Existing**. Select attributes and click **Add**.
6. Click **Save & Continue**.
7. To start tracking events, click **Activate**.

Ensure Compliance with Consent Settings

Marketing Cloud Next 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.

View supported editions.

User permissions needed	
To manage settings in Salesforce Setup:	View Setup and Configuration OR System Administrator 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 Next, 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.

By default, the email preference page includes the default marketing communication subscription. See Preference Pages in Marketing Cloud Next.

- Create a Communication Subscription in Marketing Cloud Next

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, SMS, and RCS. Subscribers must give consent to receive promotional messages from each channel type.

- Turn On Custom Preference Pages

If you enabled Marketing Cloud Next before April 2026, turn on custom preference pages. If you enabled Marketing Cloud Next after April 2026, you have this functionality by default.

- Import Consent Data to Marketing Cloud Next

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

- Formatting Marketing Consent Import Files

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

Create a Communication Subscription in Marketing Cloud Next

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, SMS, and RCS. Subscribers must give consent to receive promotional messages from each channel type.

View supported editions.

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. For RCS, select at least one RCS agent.
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.

Turn On Custom Preference Pages

If you enabled Marketing Cloud Next before April 2026, turn on custom preference pages. If you enabled Marketing Cloud Next after April 2026, you have this functionality by default.

View supported editions.

User Permissions Needed	
To turn on custom preference pages:	Modify All Data OR Marketing Cloud Admin permission set

Before you turn on Custom Preference Pages, review these considerations:

- This change is permanent and can’t be undone.
- When you turn on custom preference pages, the legacy default preference pages no longer work. For each of your channels, Salesforce creates published default pages with the same subscriptions as your legacy pages. If you use a legacy default page URL anywhere, remove or update it.
- After you turn on custom preference pages, you can edit preference pages from the Consent tab or from the Content tab.

1. In Setup, search and select **Marketing Features**, and then select **Preference Page Customization**.
2. Turn on **Custom Preference Pages**.

After you turn on the functionality, you can customize any default pages that were created for you, or create new custom pages for each messaging channel that you use.

Import Consent Data to Marketing Cloud Next

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

View supported editions.

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

Before you import consent data, make sure that each person's contact points, such as email and phone number, already exist in Marketing Cloud Next. A consent import adds and updates consent information for existing contact points, but it doesn'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. For SMS consent imports, enter the Sender Code that you plan to use with the subscription. For RCS consent imports, select the RCS agent.
4. Select a consent status to apply to all of the items in your import, and then click **Next**.
5. Upload your CSV, and then click **Next**.

   Note: For each contact point, make sure that the consent date in the CSV file is later than the existing consent date. The importer ignores all incoming consent dates that occur before the existing consent dates.
6. On the preview step, review the sample fields from your file.
7. 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 the import completes, 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 360.

Formatting Marketing Consent Import Files

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

View supported editions.

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 as the first column and the date of consent as the second column. 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, including the use of capital or lowercase letters.

- `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 the UTC timezone	Z OR *blank* OR +0000

Important:

When you use an import to update a record, you can't change the consent date to a value that occurs before the consent date for the existing record. If the consent date in the update occurs before the consent date for the existing record, the updated date is ignored.

Email File Guidelines

When you format a CSV file 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`.
- Email addresses 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, an E.164-formatted United States or Canadian phone number looks like this: `+12065550123`.
- Spaces, dashes, underscores, and parentheses are automatically removed from phone numbers.
- Phone numbers can only include numerals.

Configure Web Tracking for Marketing

Track visitor activities and engagement across your marketing landing pages and external sites. Use the data to create more targeted segments and inform your marketing strategy.

Content Type	Requirements
Marketing landing pages with a consent banner	• Data Cloud integration • Data Cloud Web Tracking Consent Banner integration • Consent banner created in Salesforce CMS
Marketing landing pages without a 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 a consent banner	• External Tracking data kit • Website connector • Consent banner created in Salesforce CMS • Webpage embed code in external page source

Content Type	Requirements
External pages without a consent banner*	• External Tracking data kit • Website connector • Webpage embed code in external page source • Event tracking code in external site page head markup

Note: If you use a third-party consent management platform such as OneTrust, use the External Pages without a Consent Banner configuration. These platforms aren't supported by Salesforce and you're responsible for complying with privacy laws and regulations that apply to your business.

- Considerations for Activity Tracking

Before you turn on activity tracking, review considerations, compliance details, and cookie information.

- Track Activity on Marketing Landing Pages

To track visitor activities on your marketing landing pages, install the required integration on the default Marketing Landing Pages site. To protect the privacy of your landing page visitors, collect their consent to track with a custom consent banner that you design in Salesforce CMS. You’re responsible for complying with privacy laws and regulations applicable to your business.

- Track Activity on External Sites

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

Considerations for Activity Tracking

Before you turn on activity tracking, review considerations, compliance details, and cookie information.

View supported editions.

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. You can choose not to collect consent to track.

If you require consent to track, we don't record each visitor’s first page view because it occurs before they provide consent.

Implementation

Landing pages are served using the Experience Cloud Sites framework. The default Marketing Landing Pages site operates behind the scenes. Don’t add content to it.

You design consent banners in Salesforce CMS. All marketing landing pages use the same consent banner. You can use different consent banners across external websites.

Tracked Data

After you configure web tracking, these activities are tracked.

- Page views
- Form submissions
- Link clicks

- Button clicks

Identity Stitching

Identity stitching links a visitor's anonymous web activity to a known profile. When someone visits a tracked landing page or external site, we use tracking cookies to record their activity. Cookies store a unique identifier for each visitor but don't store personally identifying information. Interactions, such as page views and clicks, are attributed to the anonymous individual ID.

When a visitor identifies themselves by submitting a form or clicking a tracked link, identity resolution rules create a connection between the known individual, such as a lead or contact, and the anonymous visitor activity. It can take up to 24 hours to connect visitor activity to a known individual.

Tracking Cookie Reference

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.

To make sure that activity is tracked, set up your website to use first-party tracking by aligning all of your web pages and Salesforce content under your root domain. Industry standards are moving away from third-party cookie tracking, and we recommend using first-party domain alignment.

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.
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	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 Marketing Landing Pages

To track visitor activities on your marketing landing pages, install the required integration on the default Marketing Landing Pages site. To protect the privacy of your landing page visitors, collect their consent to track with a custom consent banner that you design in Salesforce CMS. You're responsible for complying with privacy laws and regulations applicable to your business.

View supported editions.

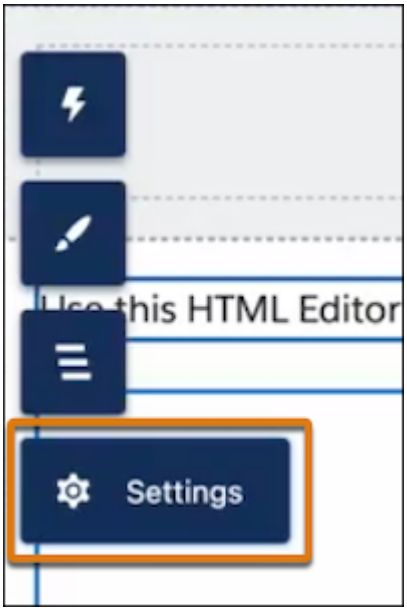
User Permissions Needed	
To configure external tracking:	Marketing Cloud Admin permission set

User Permissions Needed	
To create and publish a consent banner:	Marketing Cloud Manager permission set AND a CMS workspace contributor role of content admin or content manager

Track Activity with a Consent Banner

First, design a banner in Salesforce CMS to use on all marketing landing pages. Then, select the banner in Setup and add the required integrations to your Marketing Landing Pages site. 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. Create and publish a consent banner in Salesforce CMS.
2. Select the consent banner to use on landing pages.
   a) From Setup, in the Quick Find box, enter `Landing Pages`, and select **Landing Page Tracking**.
   a) In the banner section, click **Select Banner**.
   a) Select a banner and save your work.
3. Add the required integrations to your Marketing Landing Pages site in Digital Experiences.
   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**.
   Marketing landing pages use the Experience Cloud 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 you selected to your landing pages, click **Publish**.

Any time you make changes to the banner, publish the Marketing Landing Pages site again in Experience Cloud. To test the banner on a real page, create a landing page and view it in a web browser.

Enable Tracking Without a 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 Salesforce, such as your company website. To protect the privacy of your site visitors, use a consent banner to collect consent to track. You're responsible for complying with privacy laws and regulations applicable to your business.

View supported editions.

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

- If you're setting up external tracking for the first time, create a website connector, and then create embed code that you add to your external site.
- If you've set up external tracking before Winter '26, update your external tracking configuration.
- Create a consent banner in Salesforce CMS for tracking activity on your website.

Create External Tracking Configuration

First, create a website connector that collects activity data from your external site. Then, create the embed code to add to your external site and associate it with your website connector, a consent banner, and a campaign.

Important: In most cases, you can reuse the same website connector for multiple embed codes. However, if you're a Data Cloud One user, create and use a unique website connector for each org that has web tracking enabled.

1. Create a website connector.
   a) From Setup, in the Quick Find box, enter `Web Tracking`, and then select **Website Connectors**.
   b) Click **New**.
   c) Name the website connector and click **Create**.
2. Create the embed code.
   a) From Setup, in the Quick Find box, enter `Web Tracking`, and then select **Webpage Embed Codes**.
   b) Click **New**.
   c) Name the embed code and select a website connector.
   d) In the Configure Tracking Settings section, click **Select Banner**.
      If you use a third-party consent management platform such as OneTrust, skip this step. These platforms aren't supported by Salesforce and you're responsible for complying with privacy laws and regulations that apply to your business.
   e) Select a banner and save your work.
   f) Select a campaign to associate with the engagement data.
   g) Click **Create**.
3. To turn on data collection on your website, copy the embed code and add it to your website's head tag.

To track activity without collecting consent, don't select a banner in Salesforce Setup. Instead, add this code snippet to your external website before the embed code:

```
<script>
    document.addEventListener("consentbannerready",() => {
        const consent = {
            provider: "Salesforce Marketing Cloud",
            purpose: "Tracking",
            status: "Opt In"
        };

        window.getSalesforceInteractions().init({
            consents: [consent],
        }).then(() => {
            window.getSalesforceInteractions().initSitemap({pageTypes: []});
        });
    });
</script>
```

Update External Tracking Configuration

If you set up external tracking before Winter '26, update your external tracking configuration to access the latest feature updates. Copy the web tracking script, and replace the existing script on your website.

Important: If you don't see your connectors and you created them before Summer '25, contact Salesforce Customer Support to regain access to your website connectors with required updates.

1. From the Website Connectors page, configure your web tracking connector.

2. Copy the embed code and replace the existing code in your webpage's head tag.

   Note: For accurate reporting of your website data, replace the script on your website.
3. Save your changes.

Set Up Reporting in Marketing Cloud Next

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

View supported editions.

- 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.

- Set Up Marketing Performance Intelligence

Set up Tableau Next to unify marketing data and analytics with Data 360, Tableau Next, and the Marketing Semantic Data Model. Use embedded reports and comprehensive dashboards to analyze campaign and content performance, track marketing goals, understand customer journeys, and identify opportunities to improve ROI.

- Set Up Analytics Reports and Dashboards

Marketing analytics packages include preconfigured dashboards and folders with reporting data about your marketing efforts.

- Customize the Analytics Page

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

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.

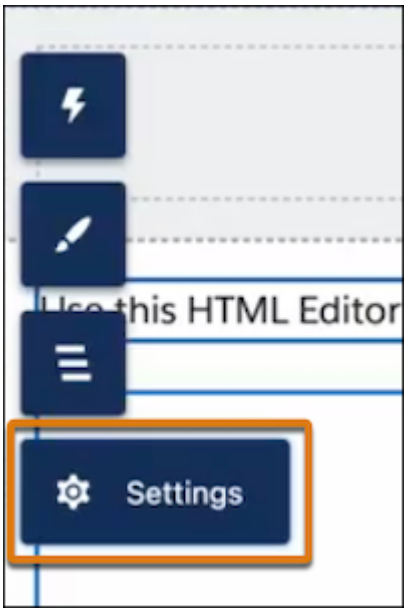
View supported editions.

User Permissions Needed	
To install data kits and packages:	View Setup and Configuration OR System Administrator profile OR Marketing Cloud Admin permission set
To deploy data streams:	Data Cloud Architect 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.

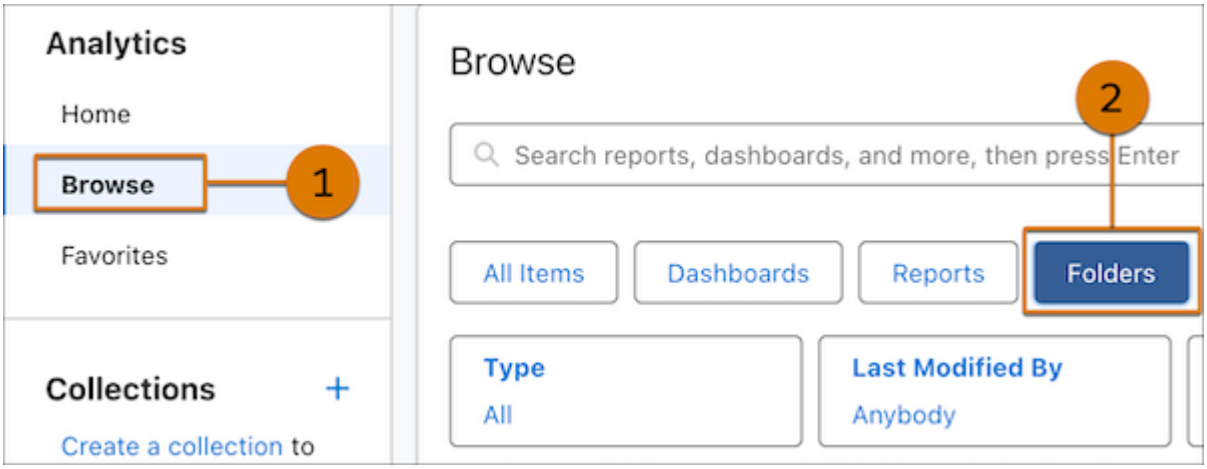
Also, confirm that Enable the Unified Experience for Analytics Home is turned on in your org. This setting controls access to the Analytics tab, where the installed dashboards, reports, and folders appear.

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 Marketing Cloud Next are served using the Data 360 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 360 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 Marketing 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 360 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 Intelligence

Set up Tableau Next to unify marketing data and analytics with Data 360, Tableau Next, and the Marketing Semantic Data Model. Use embedded reports and comprehensive dashboards to analyze campaign and content performance, track marketing goals, understand customer journeys, and identify opportunities to improve ROI.

View supported editions.

User Permissions Needed	
To turn on Marketing Performance Intelligence:	Data Cloud Architect and Marketing Cloud Admin permission sets
To view Marketing Performance Intelligence dashboards:	Tableau Next Included App Business User permission set AND Marketing Cloud Manager

Note:

Marketing Performance is now Marketing Performance Intelligence.

If you installed Marketing Performance before Winter ’26, update the app. Remove the current version, and then reinstall the latest version. See Get the Latest Marketing Performance Intelligence Dashboard.

Note:

Using the Marketing Performance Intelligence app consumes Data 360 credits, which can increase your bill. Learn more about the billing impact of Data 360-powered features.

Install Marketing Performance Intelligence

Set up Marketing Performance Intelligence for the first time with Data 360 integration, data kits, and analytics workspace.

1. From Setup, in the Quick Find box, enter `Marketing Performance Intelligence`, and click **Marketing Performance Intelligence**.
2. Confirm that you have these prerequisites:
   a) Make sure that you've installed the required Marketing data kits.
   b) Deploy the Sales Data Kit. To avoid deploying the full kit, manually map these fields to the data model object (DMO) in Data Cloud.

DMO	Fields
Contact Point Email	• Email Latest Bounce Date Time • Email Latest Bounce Reason Text

   c) To personalize marketing content with data, set up Personalization.
   d) To include web tracking data in reports, such as custom tracked link activity, configure web tracking.
   e) To view embedded analytics for Flow elements, install Flow Performance.
3. In the Install Marketing Performance Intelligence section, click **Install**.
   To start the installation, you must have both the Data Cloud Architect and Marketing Cloud Admin permission sets. Monitor the progress of the installation on the Marketing Performance Intelligence tab. To view the success or failure messages associated with your install, under Monitoring, click the event name.
4. In the Assign Marketing Performance Intelligence Permissions section, click **Go to Permission Set**. Assign the **Tableau Next Included App Business User** and the **Marketing Cloud Manager** permission sets to any users who require access to Marketing Performance Intelligence data.
   See Assign Marketing Permission Sets.
5. In the Marketing app, check the Data Management and Marketing Analytics tabs to confirm that your data and dashboards are available.

   In the Marketing app, check the Data Management and Marketing Analytics tabs to confirm that your data and dashboards are available.

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

Get the Latest Marketing Performance Intelligence Dashboard

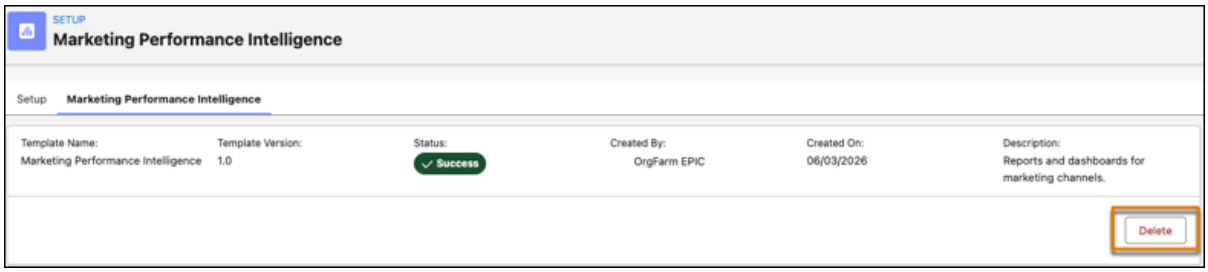
To access the latest features and dashboards, remove the current Marketing Performance Intelligence app and install the latest version. Salesforce regularly updates Marketing Performance Intelligence reports and dashboards with new features, fields, and enhancements. You can find these updates in the release notes.

Note:

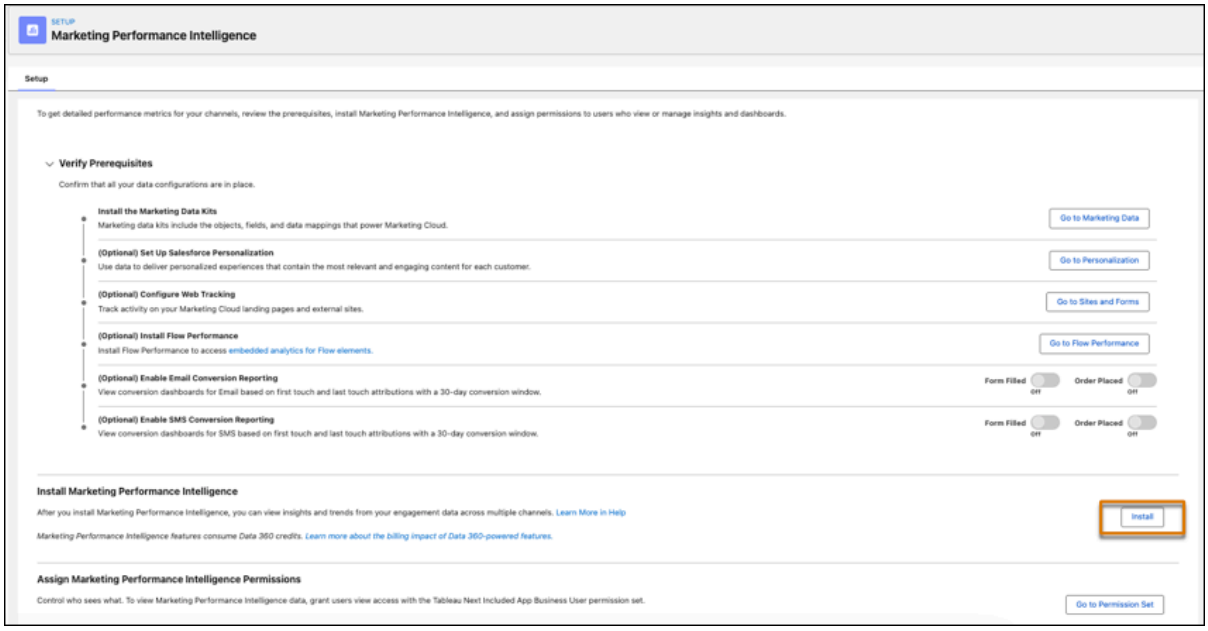
Rich Communication Services (RCS) analytics is available by default after you set up an eligible RCS channel, deploy its required data kits, and install the latest version of the Marketing Performance Intelligence app. It doesn't require an additional analytics license.

1. From Setup, in the Quick Find box, enter `Marketing Performance Intelligence`, and then click **Marketing Performance Intelligence**.
2. Go to the Marketing Performance Intelligence tab.

3. Delete the existing app.



4. Make sure that you've updated the required Marketing data kits.
5. After the data kits update and show a Deployed status, reinstall the Marketing Performance Intelligence app from the Setup tab.



6. To view the updated dashboard, open the Marketing Analytics tab in the Marketing app.

Set Up Analytics Reports and Dashboards

Marketing analytics packages include preconfigured dashboards and folders with reporting data about your marketing efforts.

View supported editions.

Note: Starting in Summer '26, Data Cloud Report analytics managed packages are available only in orgs where Marketing Cloud Next was provisioned with a default data space before Summer '26.

- Existing customers can find these packages by going to **Setup** > **Marketing Cloud** > **Reporting and Optimization** > **Analytics**.
- All other customers, including anyone in a non-default data space or business unit and new customers on Marketing Cloud Next **Growth** or **Advanced** editions, can install Marketing Performance Intelligence instead. Marketing Performance Intelligence provides an equivalent experience with an updated user interface powered by Tableau Next.

Before you install the analytics packages, confirm that the Unified Experience for Analytics Home is turned on in your org. This setting controls access to the Analytics tab, where the installed dashboards, reports, and folders appear. From Setup, in the Quick Find box, enter Reports and Dashboards Settings, and then select it. Confirm that Enable the Unified Experience for Analytics Home is selected. See Enable the Unified Experience for Analytics Home.

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

To install the Marketing Analytics package, you need at least two available dynamic dashboard licenses. If you've reached the limit, reduce the number of dynamic dashboards in use or purchase more licenses, then retry the installation. See Find the Dynamic Dashboards in my Organization.

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 360 - 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.
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 360 integrations to the default Marketing Landing Pages site.

Customize the Analytics Page

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

View supported editions.

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 Marketing Cloud Next, 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 Next

Score leads, contacts, prospects, and accounts based on how engaged they are with your marketing efforts, how closely they resemble your ideal customer, or 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.

View supported editions.

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

- Considerations for Scoring in Marketing Cloud Next

When working with scoring, keep these considerations in mind.

- Configure Scoring Models in Marketing Cloud

To begin scoring leads, contacts, prospects, and accounts, select the Unified Individual or Account object to score on. Then, create scoring models and use default scoring rules or customize them. You can also add or delete rules, and create complex rules with multiple conditions.

Considerations for Scoring in Marketing Cloud Next

When working with scoring, keep these considerations in mind.

View supported editions.

- Before you publish a scoring model for the first time, you can edit its rules and save the scoring model as a draft. Always republish a scoring rule after making any changes.
- After you publish a scoring model, records are scored retroactively on any relevant data stored in Data 360.
- If you change the scoring object, it can take some time to process your scoring models and apply their rules 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.
- An individual's engagement, fit, and overall marketing scores are normalized to provide a number from 0 to 100. For engagement and fit scores, you can also see the raw aggregate data used to calculate the normalized scores.

Configure Scoring Models in Marketing Cloud

To begin scoring leads, contacts, prospects, and accounts, select the Unified Individual or Account object to score on. Then, create scoring models and use default scoring rules or customize them. You can also add or delete rules, and create complex rules with multiple conditions.

View supported editions.

User Permissions Needed	
To manage and publish scoring models:	Configure Marketing Cloud Scoring Models AND One of these permission sets: • Data Cloud Architect • Data Cloud for Marketing Admin • Data Cloud Aware Specialist

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

Create Identity Resolution Rulesets

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

Turn On Scoring Models

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 then turn on all scoring features.
3. After Scoring is enabled, click **Go to Scoring Setup**, and create a Scoring Model.

Create a Scoring Model

To segment scores based on different needs, products, regions, or communication channels, and to manage scoring frequency, set up a scoring model. Leads, contacts, and prospects receive scores based on their unified profiles.

1. From Setup, in the Quick Find box, enter `Scoring`, select **Scoring Models**, and then click **New**.
2. Enter your Scoring Model details.
   a) Add a Model Name, and then select a business unit.
   b) Select **People**, **Account**, or both, and then click **Next**.

3. Select the **People** or **Account** tab.
4. In the Overall Score section, decide how to weigh engagement and fit.
   a) To edit the ratio, click **Edit Score Ratio**, make your adjustments, and then click **Save**.
   b) (Optional) For account scoring models, enable intent scoring, change the score ratio to equal 100%, and click **Save**.

   If you enable account intent scoring, republish the scoring model.
5. Review or edit the default Engagement Score Rules and Fit Score Rules, or create your own custom scoring rules for unified individuals.
6. To start scoring your leads, contacts, prospects, and accounts, click **Publish**.
7. Select the frequency schedule from the dropdown, and then click **Publish**.

   You can adjust the schedule frequency after publishing.

   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.

Create a Custom Scoring Rule

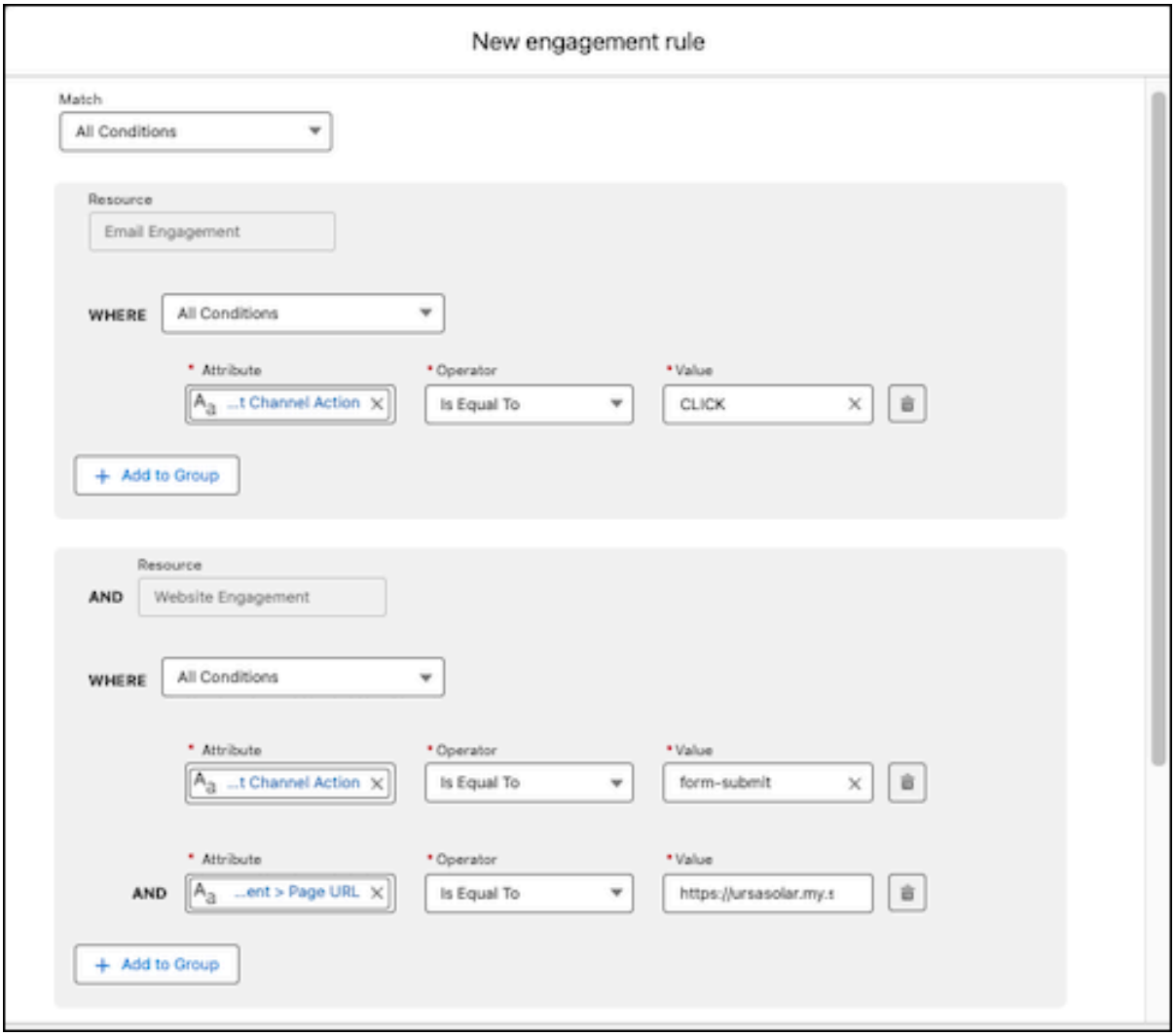
You can create custom scoring rules to fit your needs. When you create a rule, each attribute represents a record field and the value is the data you're interested in. For example, Engagement Channel Action is an attribute, and CLICK is a value.

1. From the Scoring Models page, select a scoring model.

   To add custom scoring rules, a scoring model must be in an Inactive or Draft status.
2. Under the Engagement Score Rules section or Fit Score Rules section, click **New**, and then add a Description.
3. On the Match dropdown menu, select **All conditions are met (AND)** or **Any conditions are met (ANY)** logic for your rule.
4. To complete the first condition, use the dropdowns for Attribute, Operator, and Value.

   Enter the exact attribute value including 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.

5. Add more conditions as needed.
   - To add a top-level condition, click **Add Condition**.
   - 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**.
8. To add more rules, click **New Rule**.

Edit a Scoring Schedule

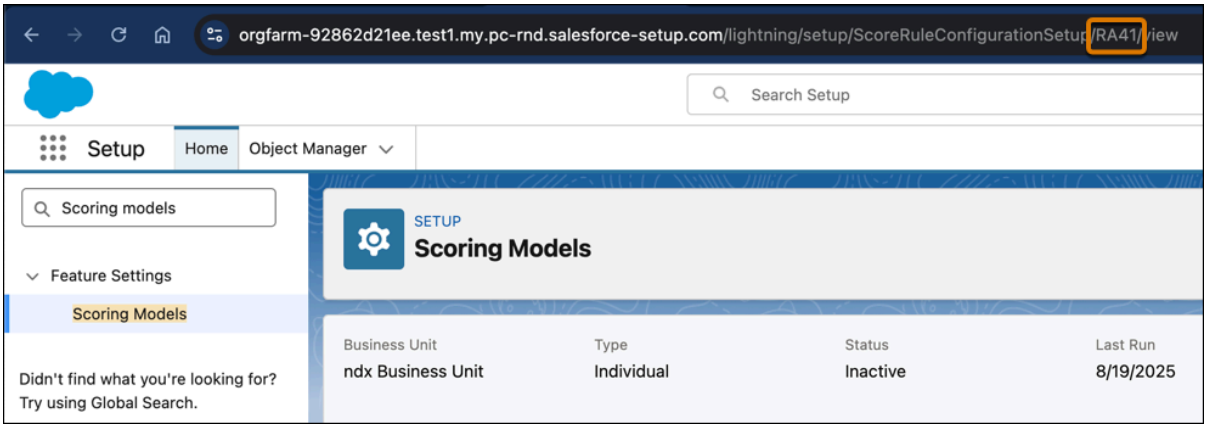
To manage consumption costs and scoring usage, you can choose how often a scoring model runs by editing its scoring schedule. You can choose from one of four different run frequencies, from every 1 hour to every 24 hours. The more often a scoring model runs, the more actionable it is, but the more credits it consumes.

1. From the Scoring Models page, click on a scoring model.
2. Click **Edit** under Schedule.
3. In the Schedule dropdown, select a run frequency for the scoring model, and then click **Save**.

4. Publish the updates.
   a) Click **Republish**.
   b) Confirm your schedule frequency selection.
   c) Click **Publish**.

Delete a Scoring Model

1. Before you delete the scoring model, remove any Calculated Insights scoring references.
   a) From Data 360, go to the **Calculated Insights** tab.
   b) The four-digit ID in parenthesis next to each Calculated Insight relates to the scoring model ID. Find the matching ID in the URL of the scoring model you want to delete.



2. Due to dependencies, you must delete any Calculated Insights related to a scoring model in this order.

   a. Overall Marketing Score

   b. Account Score

   c. Marketing Engagement Score

   d. Account Engagement Score

   e. Lead Engagement Score

   f. Contact Engagement Score

   g. Marketing Fit Score

   h. Account Fit Score

   i. Account Intent Score

   j. Individual Engagement Score

3. From the Scoring Models page, make sure the scoring model you want to delete has a status of Draft or Inactive.
   a) If the scoring model has a status of Active, click the dropdown to the right of the scoring model, and select **Deactivate**.
4. After you delete every Calculated Insight that's related to the scoring model, click the dropdown to the right of the scoring model, and then select **Delete**.

Enable AI Features in Marketing Cloud Next

Marketing Cloud Next 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 that best fit the needs of your business.

View supported editions.

User Permissions Needed	
To enable AI features, including Agentforce	Marketing Cloud Admin permission set
To access the marketing agents	Marketing Team Agent Access

Set up AI in Marketing Cloud Next

To jumpstart 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 Salesforce Foundations, which is required to enable marketing agent templates and access the latest Agentforce innovations for Salesforce Marketing apps.
2. Set up generative AI in Salesforce. See Set Up Einstein Generative AI. For guidance on deploying the Agentforce Employee Agent, see the Agentforce Implementation Guide for Employee-Facing Agents.
3. Enable the Agentforce Employee Agent and make sure that users have the required permissions.
4. Enable marketing AI features and agents.
   a) In Setup, search for `Einstein & Agentforce`.
   b) Enable all the AI features that you want to use, and set up the applicable marketing agent templates.

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

Agentforce Agents and Standard Actions

Agentforce uses several marketing-specific agents and standard actions to create briefs, campaigns, campaign content, and journey selections.

After you enable generative AI and Agentforce, verify that the standard actions are there, and create any custom agents you need. For a full list of Agentforce actions, see the Standard Agent Action Reference. You can customize the standard actions, and add custom actions to the agents.

Agent Name	Associated Standard Actions
Account Discovery	• Marketing Cloud: Get Marketing Scores • Marketing Cloud: Get Recent Activities • Marketing Cloud: Summarize Conversations • Marketing Cloud: Find New Buyer Group Members

Agent Name	Associated Standard Actions
Campaign Creation	• Marketing Cloud: Draft a campaign Brief • Marketing Cloud: Refine Campaign Preview • Marketing Cloud: Save Campaign Brief • Marketing Cloud: Create a Campaign from a Brief • Marketing Cloud: Save Campaign • Identify Record by Name • Marketing Cloud: Summarize a Campaign • Marketing Cloud: Generate Campaign Insights • Marketing Cloud: Identify Business Unit
Content Builder	• Marketing Cloud: Draft Content • Marketing Cloud: Create Section with Content • Marketing Cloud: Create Section
Distributed Marketing	• Marketing Cloud: Get Distributed Marketing Email Templates • Marketing Cloud: Get Marketing Engagement Activities • Marketing Cloud: Identify Top Engaged Unified Individuals
Journey Decisioning (for Marketing Cloud Engagement+)	• Marketing Cloud: Select Journey • Marketing Cloud: Create Journey Content

See the Agentforce Marketing: Campaign Creation Onboarding Guide for information about setting up and using the campaign creation agent.

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 Next Growth Edition, opt in to the Global Data Model for Einstein. In 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 Marketing Cloud Next.
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.

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 help you increase customer engagement. It assigns individual contact-level scores to determine the most efficient way to message recipients. This feature is available only in Marketing Cloud Next 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 Next 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.

Recommended Page Customization

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

View supported editions.

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	Leads, Contacts, and Person Accounts records
Data 360 Profile Engagement	A table of engagement metrics from automations and messaging channels	Lead and Contact records
Data 360 Profile Insights	A numerical score that indicates someone's level of engagement	Lead and Contact records

Data 360 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 360 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

Set Up a Sandbox in Marketing Cloud Next

A sandbox is a copy of your Salesforce org that you can use for development, testing, and training without compromising the data and apps in your production org. Marketing Cloud Next supports every sandbox type: Developer, Developer Pro, Partial Copy, and Full Copy.

View supported editions.

User Permissions Needed	
To create a sandbox:	Manage Dev Sandboxes (Developer or Developer Pro only) OR Manage Sandboxes (all sandbox types)
To deploy Data 360 objects:	Data Cloud Architect

To use Marketing Cloud Next in a sandbox, create a sandbox org, turn on Data 360, and then set up Marketing Cloud Next the same way you would in a production org.

Before you begin, make sure that Marketing Cloud Next and Data 360 are turned on in your production org.

1. Prepare a sandbox.

   If you're using an existing sandbox, make sure that the Marketing Cloud Next licenses are in the sandbox by matching production licenses or refreshing your sandbox. Otherwise, create a sandbox.
2. Turn on Data 360 in the sandbox.

   See Create a Data 360 Sandbox.
3. Confirm that the required Data 360 connectors are active, including the Salesforce CRM connector, the Websites and Mobile Apps connector, and the Ingestion API connectors. See Check Connector Status.
4. Set up Marketing Cloud Next and applicable Unified Messaging channels.

   See Getting Started with Marketing Cloud Next Setup.
5. To test landing pages in your sandbox, publish the Marketing Landing Pages site.

   The Marketing Landing Pages site supports landing pages with Experience Cloud tools but isn't designed to contain content. Don't add content directly to this site.

   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**.

   c) Click **Publish**.
6. When you're finished testing, deploy the changes.

Helpful Resources

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

- Feature Availability by Marketing Cloud Next Edition

Marketing Cloud Next is available in Growth and Advanced editions, and requires Salesforce Enterprise or Unlimited editions. Some features are limited by edition or purchased add-on. All functionality is available in Lightning Experience only.

- Allocations and Limits in Marketing Cloud Next

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

- User Permissions in Marketing Cloud Next

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

- Domain Settings in Marketing Cloud Next

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.

- Default Scoring System in Marketing Cloud Next

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 Account object and all people objects. Fit rules are available only for the object that they're listed under.

- AI Data Usage in Marketing Cloud Next

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

- Model Card: Einstein Metrics Guard

In Marketing Cloud Next, Einstein Metrics Guard analyzes email open and click events and calculates the likelihood that each event is real. The model primarily focuses on filtering emails through large-scale email providers that open messages before the customer opens them. The model is also effective for opens and clicks from email scanners on private, corporate email servers.

- Model Card: Einstein Send Time Optimization

In Marketing Cloud Next, 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.

- Marketing Cloud Next Glossary

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

Feature Availability by Marketing Cloud Next Edition

Marketing Cloud Next is available in Growth and Advanced editions, and requires Salesforce Enterprise or Unlimited editions. Some features are limited by edition or purchased add-on. All functionality is available in Lightning Experience only.

Access from Other Marketing Apps

Next-gen features are available to customers who use Marketing Cloud Account Engagement or Marketing Cloud Engagement. To use those features, you also need a Data 360 license and the required credits to support your agentic marketing efforts. Data 360 is available through various SKUs including the no-cost Salesforce Foundations SKU.

For a list of available features and add-ons, and limits for API, content, and data, expand the comparison information on the Pricing page.

Base Edition	Next Edition	Access Details
Account Engagement Growth Edition	Marketing Cloud Next Growth Edition	Available as of Winter '25.
Account Engagement Plus, Advanced, and Premium editions	Marketing Cloud Next Advanced Edition	Available as of Winter '25
Engagement Pro edition	Marketing Cloud Next Growth Edition	Requires renewal with an add-on.
Engagement Corporate, Enterprise, and Enterprise Plus edition	Marketing Cloud Next Advanced Edition	Requires renewal with an add-on

Growth Edition

These tools and features are available in orgs with access to Marketing Cloud Next Growth Edition. Salesforce Enterprise or Unlimited edition and any Data 360 edition are also required.

Campaigns and Marketing Flows	All standard marketing flow elements, such as sending messages, updating records, and decisions. See Flow Elements for Marketers.
Content	Basic personalization Distributed Marketing and Alerts Standard marketing content types, such as email, forms, form handlers, landing pages, brand kits, and saved merge field expressions
Data and Optimization	Calculated Insights Data 360 data streams, data graphs, data mapping Segmentation Reporting and analytics
Generative AI	Campaign creation agent: campaign brief and analysis Content creation Segment creation
Predictive AI	AI Metrics Guard Email Send Time Optimization
Setup and administration	Consent management Email authentication

Advanced Edition

These tools and features are available in orgs with access to Marketing Cloud Next Advanced Edition. Salesforce Enterprise or Unlimited edition and any Data 360 edition are also required.

Campaigns and Marketing Flows	Path Experiment flow element
Mobile App Messaging	Flash notifications

	In-app notifications
	Push notifications
Generative AI	Agentic content
	Buyer Engagement agent
Predictive AI	AI Engagement Frequency
	AI Engagement Scoring
Setup and administration	Business unit support

Allocations and Limits in Marketing Cloud Next

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

View supported editions.

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
Versions per flow	50 versions	50 versions

Segments

For more information about limits that apply to segments, see Data 360 Limits and Guidelines.

To estimate your Data 360 consumption, see Data 360 Pricing Calculator.

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 Marketing Cloud Next 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

Agentic Content

When limits are met, agentic generation features are turned off for all users in the org and are unavailable in the agentic content workspace UI. Usage limits reset on the first of every month at 12:00 AM in the org's local system time. Unused allocations from the previous month don't carry over. For more information, see AI Usage Limits for Agentic Content.

Resource	GROWTH EDITION	ADVANCED EDITION
Content generation	30 per org per month	30 per org per month

Resource	GROWTH EDITION	ADVANCED EDITION
Image generation	10 per org per month	10 per org per month

Scoring and Data

Resource	GROWTH EDITION	ADVANCED EDITION
Fit scoring rules	30 rules	30 rules
Engagement scoring rules	30 rules	30 rules
Scoring models	1 model	2 models

Marketing Objects Limits

Additional Marketing Objects storage can be purchased as an add-on.

Resource	GROWTH EDITION	ADVANCED EDITION
Total Marketing Objects storage	10 GB	50 GB
Engagement scoring rules	25	100

User Permissions in Marketing Cloud Next

Marketing Cloud Next 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.

View supported editions.

First, create your users, and then assign permissions.

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 System 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 Next

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

Name	Description
Edit Marketing Consent Settings	Edit the consent settings 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 System 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.
Manage RCS Messaging Setup	Create, view, edit, and delete RCS objects in Salesforce Setup.
Query CMS Email Content	Prepare CMS email content for sending from campaigns and Flow Builder. Email sending also requires Create on Flow object.
Send Test Email	Send test emails from the preview and test operation via Messaging Service.
Send Test SMS	Send test SMS messages for the preview and test operation via Messaging Service.
Send Unified Messaging Email	Send email via Messaging Service.
Send Unified Messaging SMS	Send SMS via Messaging Service.
View Email Messaging Setup	View email objects in Salesforce Setup.
View SMS Messaging Setup	View SMS objects in Salesforce Setup.

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

Flow Permissions in Marketing Cloud Next

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, with the exception of record-triggered flows, in the Automation or Marketing apps. Record-triggered flows require the Manage Flow permission.
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.
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.

Name	Description
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 Flows	Allow users without the Manage Flow user permission to create, edit, and delete segment 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 360
Calculated Insight Object	Data 360
Calculated Insight Object Definitions	Data 360
Campaigns	Marketing Cloud Next, Sales Cloud
Communication Subscription Channel Types	Privacy Center, consent settings
Communication Subscription	Privacy Center, consent settings
Data Connections	Data 360
Data Connector Credentials	Data 360
Data Connectors for GCS	Data 360
Data Connectors for Interaction Studio	Data 360
Data Connectors for Marketing Cloud	Data 360
Data Connectors for S3	Data 360
Data Connectors for Sftp	Data 360
Data Connectors for Upload	Data 360
Data Lake Fields	Data 360
Data Lake Object Definitions	Data 360
Data Model Domain Capability Usage	Data 360
Data Model Fields	Data 360
Data Model Objects	Data 360

Name	Related Cloud or Feature
Data Model Relation Constraints	Data 360
Data Model Taxonomies	Data 360
Data Object Categories	Data 360
Data Platforms	Data 360
Data Source Objects	Data 360
Data Sources	Data 360
Data Source Tenants	Data 360
Data Space Definitions	Data 360
Data Spaces	Data 360
Data Transport Fields	Data 360
Data Transport Object	Data 360
Engagement Channel Types	Privacy Center, consent settings
External Data Connectors	Data 360
Field Source Target Relationships	Data 360
Ingestion API Data Connectors	Data 360
Internal Data Connectors	Data 360
Market Segment Definitions	Data 360
Mobile App Data Connectors	Data 360

Domain Settings in Marketing Cloud Next

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.

View supported editions.

Default Domains

Marketing Cloud Next provides some default domains that support various content assets. This table outlines the default values that are used. Values in brackets indicate a variable that a marketing admin can configure. For further control over these URLs, you can configure custom domains for each usage type.

Usage	Domain Type	Default Values
Salesforce login URL	My Domain	[mydomain].salesforce.com After an admin configures the preferred My Domain for your org, its used in many locations.
Email Links	Tracker Domain	cdp3.tracking.e360.salesforce.com

Usage	Domain Type	Default Values
Email Images	My Domain	https://[mydomain].cdn.salesforce-experiences.com
Email Preference Center	My Domain	https://[mydomain].salesforce.com
Landing Pages	Custom Domain	https://[mydomain].cdn.salesforce-experiences.com
SMS Links	Tracker Domain, Shortener	https://[a].sfmsg.co

Email sending domains for Marketing Cloud Next aren't provided by default.

My Domain

My Domain allows you to showcase your company's brand with a custom subdomain name in your Salesforce org login, application URLs, and some other locations.

An admin can access My Domain setup pages here: **Salesforce Setup** > **Company Settings** > **My Domain** .

Tracker Domain

A tracking domain monitors opens and link clicks in emails and SMS messages. The default tracking domain is owned by Salesforce, but you can configure a branded domain that your organization manages.

This process is sometimes called link rewriting, because we "rewrite" the original URLs in your message with the tracker domain. The page loads quickly through that domain where we capture the engagement, and then forwards them to the target URL.

To use tracking, an admin must configure the domains on these pages, and then marketers can enable tracking on individual messages.

- Email: **Salesforce Setup** > **Unified Messaging** > **Email** > **Email Links**
- SMS: **Salesforce Setup** > **Unified Messaging** > **Branded Domain** > **URL Shortening Domain**

Separately, marketers can create a Marketing Tracked Link in the Content tab. These marketing links also support UTM parameters. See Create and Manage a Custom Tracked Link.

Email Sending Domain

You can use a custom domain to use for email sending, as long as you have access to the web registrar. Add the domain in Unified Messaging Setup, and then work with a IT or web administrator to apply DKIM and DMARC authentication methods to the DNS records. The authenticated sending domain is also used in your From email addresses and reply mail management.

DKIM (DomainKeys Identified Mail) 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 by defining you as a legitimate sender.

DMARC (Domain-Based Message Authentication, Reporting & Conformance) is a toolset that tells receiving message servers how to handle messages that have failed authentication checks. An admin can get started here:

- **Salesforce Setup** > **Unified Messaging** > **Email** > **Authenticated Domains**

Custom Domains

For control over the page and asset URLs that appear to customers, configure a custom domain. Then, you can use it with subdomains for various purposes throughout Marketing Cloud Next. If you configure email link tracking, SMS, and landing pages, you must authenticate a different domain or subdomain for each use case.

If you plan to use a custom domain with marketing landing pages, you must select serving content with the Salesforce Content Delivery Network (CDN) during setup. 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`.

To configure a custom domain for landing pages, visit **Salesforce Setup** > **User Interface** > **Sites and Domains** > **Domains**.

Default Scoring System in Marketing Cloud Next

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 Account object and all people objects. Fit rules are available only for the object that they're listed under.

View supported editions.

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

Rule Type	Condition Details	Value	Points
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

AI Data Usage in Marketing Cloud Next

AI is built on data. When using Marketing Cloud Next, review this table to understand the type of data used by AI 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 can 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	Uses Generative AI Model	Uses Global Model
Marketing Cloud Next: Growth and Advanced Editions	Agentforce - Campaign Creation Agent	Campaigns, Briefs, Engagement Data from Data Cloud, CMS Assets, Flows	Yes	No
	Agentforce - Content Creation Agent	Campaigns, Briefs, CMS Assets	Yes	No
	Segment Creation	Segments in Data 360	Yes	No

Product	Feature	Customer Data and Salesforce Objects Used	Uses Generative AI Model	Uses Global Model
	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 (required in Growth Edition)
	Einstein Metrics Guard	Email engagement (email sends, opens, clicks, unsubscribes, bounces, spam complaints) Data and metadata about customer sending patterns	No	Yes (required)
Marketing Cloud Next Advanced Edition	Agentforce - Journey Decisioning Agent	Journeys, subscriber content	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 Marketing Cloud Next, Einstein Metrics Guard analyzes email open and click events and calculates the likelihood that each event is real. The model primarily focuses on filtering emails through large-scale email providers that open messages before the customer opens them. The model is also effective for opens and clicks from email scanners on private, corporate email servers.

View supported editions.

Einstein Metrics Guard is available as a real-time filter on inbound email activity for Marketing Cloud Next email sends. It's also available as a calculated score on email activity from Marketing Cloud Engagement+ that's loaded into the Email Engagement DMO in Data 360. Each version addresses the same problem by using a different model.

Model Details

To analyze message opens and clicks and distinguish between bots and humans, the Einstein Metrics Guard model analyzes message opens and clicks to distinguish between bots and humans by using training algorithms, parameters, fairness constraints, features, and other applied approaches.

Person or Organization

Salesforce Marketing Cloud Next 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

Bayesian based calculation and linear regression are used for the real-time prediction service. Logistic regression and isolation forest are used for the batch prediction service.

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%. Lower scores represent higher confidence that the open or click is real. Higher 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 by using event association and attribution. When building the predictions, the most recent behavior changes and engagement patterns are weighted more heavily.

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 Next Growth or Advanced edition operate from, store, and process customer data in the same location as the customer's Data 360 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 or click 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.
- When using the real-time service that's embedded in Marketing Cloud Next sends, events that score poorly aren’t included in marketing statistics, and aren’t used to trigger follow-up actions.
- When using the batch service for Marketing Cloud Engagement+ data in Data Cloud, all events receive a predictive score for customers to analyze and use in their marketing strategy.

Relevant Factors

These factors are associated with the Einstein Metrics Guard model.

Model Input

The engagement history includes email sends and engagement events, including opens, clicks, user agent, IP subnet, and associated timestamps.

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 or click is real, the model produces a probabilistic metric score for each event. The messaging service uses the score to filter out low-scoring activity.

Environment

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

Metrics

Einstein evaluates and monitors model performance metrics to 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 Next. 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 Next, 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.

View supported editions.

Model Details

The Einstein Send Time Optimization model for Marketing Cloud Next 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 Next 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 Next Growth or Advanced edition operate from, store, and process customer data in the same location as the customer's Data 360 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 Marketing Cloud Next 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.

Marketing Cloud Next Glossary

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

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 360	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 360 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 metadata related to multiple prospect, lead, and contact records for the same person.