

News, Discussions, Questions & Ideas on Tableau Accelerators: <https://sfdc.co/Accelerators-Forum>

The Salesforce Data Cloud Identity Resolution Accelerator turns your data into a digestible series of charts to help you explore how Identity Resolution in Salesforce Data Cloud is working for your business. See a snapshot of your ingested sources, how they contribute to unified profiles, how unified profiles are composed, and a few common scenarios to explore to see how matching rules and/or data quality may be affecting your Identity Resolution results.

Monitor and improve KPIs

- **Number of Email Addresses:** The average number of Email Addresses that match the rules for each Unified Profile created
- **Number of First Names:** The average number of First Names that match the rules for each Unified Profile created
- **Number of Last Names:** The average number of Last Names that match the rules for each Unified Profile created
- **Number of Phone Numbers:** The average number of Phone Numbers that match the rules for each Unified Profile created
- **Number of Source Profiles:** The number of Profiles in the Source Objects that will be processed
- **Number of Source Objects:** The number of Source Objects: Each data source is made of Source Objects: it can be Email table, User table, Orders table,...
- **Number of Sources:** The number of data sources from which data will be consolidated to create a unified profile
- **Number of Unified Profiles:** Number of unified customer profile records that the ruleset job created

Getting Started Steps

1. Ensure the Tableau has been provisioned access to pull data from Salesforce Data Cloud. There is great documentation on how to do this on Salesforce Data Cloud [Help site \(https://help.salesforce.com/s/articleView?id=sfdc360_a_tableau_connector.htm&type=5\)](https://help.salesforce.com/s/articleView?id=sfdc360_a_tableau_connector.htm&type=5)
2. Download the Tableau Workbook using the Download button in the upper right portion of this page. The workbook will be downloaded with a set of demo data and you will need to make a few updates for the workbook to use your data.
3. Open the downloaded workbook. It should be named **Salesforce Data Cloud Identity Resolution.twbx**
4. Once you have opened the workbook, click on the Data Source tab in the lower left corner of the Tableau dashboard.
5. At this point, you will be asked to Authenticate into your Salesforce Data Cloud account. Please follow the instructions and log in to Salesforce Data Cloud for Tableau to establish a connection.
6. Next you will need to update this Data Source: **Unified Profiles**

Answer key business questions

- What volume of Source Profiles was ingested?
- How were Unified Profiles composed?
- Do the reconciliation rules result in expected outcome?

Required attributes

- ssot__Id__c (*string*): Unique identifier of the Source record
- ssot__Id__c (*string*): Unique identifier of the Unified Profile
- ssot__BirthDate__c (ssot__individual) (*date*): Birth date of the Source Profile
- ssot__BirthDate__c (*date*): Birth date of the Unified Profile
- ssot__EmailAddress__c (ssot__contactpoint) (*string*): Email Address of the Source Profile
- ssot__EmailAddress__c (*string*): Email of the Unifed Profile
- ssot__TelephoneNumber__c (ssot__contactpoint1) (*string*): Phone Number of the Source Profile
- ssot__FormattedE164PhoneNumber__c (*string*): Phone Numbers of the Unified Profile
- ssot__FirstName__c (ssot__individual) (*string*): First Name of the Source Profile
- ssot__FirstName__c (*string*): First Name of the Unified Profile
- ssot__LastName__c (ssot__individual) (*string*): Last Name of the Source Profile
- ssot__LastName__c (*string*): Last Name of the Unified Profile
- ssot__GenderId__c (ssot__individual) (*string*): Gender of the Source Profile
- ssot__GenderId__c (*string*): Gender of the Unified Profile
- ssot__DatasourceId__c (*string*): Unique identifier of the Datasource
- ssot__DataSourceObjectId__c (*string*): Unique identifier of the Datasource Object
- SourceRecordId__c (*string*): Unique identifier of the Source record
- UnifiedRecordId__c (*string*): Unique identifier of the Unified record
- **Table Name** (*string*): Name of the ruleset

7. To update the Unified Profiles you need to first click Edit in the upper right portion of the page. The workbook has a filter that was set for performance reasons that needs to be removed.
8. After you click Edit, a popup window will appear and there will be a filter that is set. The filter that comes as a preset needs to be deleted. Click on the filter and then Remove.
9. Once you have removed the filter, please click Refresh in the upper right portion of the page.
Note: Depending on the amount of data in your Salesforce Data Cloud account this process could take 10+ minutes
10. Once you have made the necessary updates and Tableau has imported the necessary data from your Salesforce Data Cloud account, go back to the *Identity Resolution Summary* tab and the workbook will refresh and show your data.
Note: The refresh of the workbook can take a few minutes depending on the amount of data in your Salesforce Data Cloud account