

⚙️ Configuration

Database:

CHANINN_SALES_INTELLIG

Schema:

DATA

Agent Name:

SALES_CONVERSATION_AGI

Search Service:

SALES_CONVERSATION_SE/

These values match the agent configuration in Day 27

↺ Reset Chat

🤖 Introduction to Cortex Agents

Learn how to create Cortex Agents with Cortex Search on sales conversations.

[📄 Data Setup](#) [🔗 Create Agent](#)

Step 1: Create Database & Schema

```
-- Create database and schema (for Days 26-28)
CREATE OR REPLACE DATABASE "CHANINN_SALES_INTELLIG
CREATE OR REPLACE SCHEMA "CHANINN_SALES_INTELLIGE
USE DATABASE "CHANINN_SALES_INTELLIGENCE"; USE SCI
```

▶ Run Step 1

Step 2: Create Sales Conversations Table

```
-- Create table for conversation transcripts
CREATE OR REPLACE TABLE "CHANINN_SALES_INTELLIGENCE"
    conversation_id VARCHAR, transcript_text TEXT
    sales_rep VARCHAR, conversation_date TIMESTAM
);
-- Insert 10 comprehensive conversation transcripts
```

▶ Run Step 2

Step 3: Create Cortex Search Service

Cortex Search creates a semantic search index on your text data. This enables the agent to find relevant conversations based on meaning, not just keywords.

```
-- Enable change tracking (required for Cortex Search)
ALTER TABLE "CHANINN_SALES_INTELLIGENCE"."DATA".SALES
SET (ENABLE_CHANGE_TRACKING = TRUE);
-- Create Cortex Search service (only if it doesn't exist)
CREATE CORTEX SEARCH SERVICE IF NOT EXISTS "CHANINN_SALES_INTELLIGENCE"."CORTX_SEARCH"
ON transcript_text ATTRIBUTES customer_name, deal_id
AS (SELECT transcript_text, customer_name, deal_id
FROM "CHANINN_SALES_INTELLIGENCE"."DATA".SALES)
```

▶ Run Step 3

Step 4: Create Sales Metrics Table

Sales Metrics Table contains structured deal data that Cortex Analyst will query. This data will be used in Day 28 for natural language SQL generation.

```
-- Create sales metrics table
CREATE OR REPLACE TABLE "CHANINN_SALES_INTELLIGENCE"."SALES_METRICS"
(deal_id VARCHAR, customer_name VARCHAR, deal_value NUMERIC,
sales_stage VARCHAR, win_status BOOLEAN, sales_date DATE);
-- Insert sample sales metrics data (10 deals)
```

▶ Run Step 4

Step 5: Upload Semantic Model YAML

Semantic Model tells Cortex Analyst how to interpret your database schema. Download the YAML file and upload it to a Snowflake stage in the next step.

```
name: sales_metrics
description: Sales metrics and analytics model
tables:
  - name: SALES_METRICS
    base_table:
      database: CHANINN_SALES_INTELLIGENCE
      schema: DATA
      table: SALES_METRICS
    dimensions:
      - name: DEAL_ID
        expr: DEAL_ID
        data_type: VARCHAR(16777216)
        sample_values: [DEAL001, DEAL002, DEAL003]
        description: Unique identifier for a sales
        synonyms: [Transaction ID, Agreement ID, C
      - name: CUSTOMER_NAME
        expr: CUSTOMER_NAME
        data_type: VARCHAR(16777216)
        sample_values: [TechCorp Inc, SmallBiz So
        description: The name of the customer asso
        synonyms: [client, buyer, purchaser, acco
      - name: SALES_STAGE
        expr: SALES_STAGE
        data_type: VARCHAR(16777216)
        sample_values: [Closed, Lost, Pending]
        description: The current stage of a sales
        synonyms: [deal_status, sales_phase, oppo
      - name: WIN_STATUS
        expr: WIN_STATUS
        data_type: BOOLEAN
        sample_values: ['TRUE', 'FALSE']
        description: Indicates whether a sale was
        synonyms: [won, success, closed, converted]
```

```
- name: SALES_REP
  expr: SALES_REP
  data_type: VARCHAR(16777216)
  sample_values: [Sarah Johnson, Mike Chen,
  description: The sales representative responsible for the sale
  synonyms: [salesperson, account_manager, sales_rep]
- name: PRODUCT_LINE
  expr: PRODUCT_LINE
  data_type: VARCHAR(16777216)
  sample_values: [Enterprise Suite, Basic Package, Premium Package]
  description: This column categorizes sales into different product lines
  synonyms: [product family, item category, product type]
time_dimensions:
- name: CLOSE_DATE
  expr: CLOSE_DATE
  data_type: DATE
  sample_values: ['2024-02-15', '2024-02-01', '2024-01-15']
  description: The date on which a sale was completed
  synonyms: [completion date, sale date, deal date]
measures:
- name: DEAL_VALUE
  expr: DEAL_VALUE
  data_type: FLOAT
  sample_values: ['75000', '25000', '150000']
  description: The total monetary value of a deal
  synonyms: [revenue, sale_amount, transaction_value]
```

Download YAML

Auto-Upload to Stage

> Manual Upload Instructions (if auto-upload fails)

Step 6: Verify Complete Setup

Check if Data is Ready

✓ Day 27 data ready! (Day 28+ data optional)

Database exists

Conversations table with 10 records

☑ Cortex Search service

☑ Sales metrics table with 10 records

☑ MODELS stage

Day 26: Introduction to Cortex Agents | Create Your First Agent | 30 Days of AI with Streamlit