

⚙️ 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_INTELLIGENCE";
CREATE OR REPLACE SCHEMA "CHANINN_SALES_INTELLIGENCE";
USE DATABASE "CHANINN_SALES_INTELLIGENCE"; USE SC
```

▷ Run Step 1

Step 2: Create Sales Conversations Table

```
-- Create table for conversation transcripts
CREATE OR REPLACE TABLE "CHANINN_SALES_INTELLIGENCE"."CONVERSATIONS"
conversation_id VARCHAR, transcript_text TEXT,
sales_rep VARCHAR, conversation_date TIMESTAMP
);
-- 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
-- Create Cortex Search service (only if it doesn't exist)
CREATE CORTEX SEARCH SERVICE IF NOT EXISTS "CHANINN_CS"
    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_stage VARCHAR,
    sales_stage VARCHAR, win_status BOOLEAN, sales_amount DECIMAL(10,2)
-- 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 deal
        synonyms: [Transaction ID, Agreement ID, Contract ID]
      - name: CUSTOMER_NAME
        expr: CUSTOMER_NAME
        data_type: VARCHAR(16777216)
        sample_values: [TechCorp Inc, SmallBiz Solutions, Corp]
        description: The name of the customer associated with the deal
        synonyms: [client, buyer, purchaser, account holder]
      - name: SALES_STAGE
        expr: SALES_STAGE
        data_type: VARCHAR(16777216)
        sample_values: [Closed, Lost, Pending]
        description: The current stage of a sales deal
        synonyms: [deal_status, sales_phase, opportunity status]
      - name: WIN_STATUS
        expr: WIN_STATUS
        data_type: BOOLEAN
        sample_values: ['TRUE', 'FALSE']
        description: Indicates whether a sale was won or lost
        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 ...
  synonyms: [salesperson, account_manager, ...
- name: PRODUCT_LINE
  expr: PRODUCT_LINE
  data_type: VARCHAR(16777216)
  sample_values: [Enterprise Suite, Basic Packag ...
  description: This column categorizes sales items ...
  synonyms: [product family, item category, ...
time_dimensions:
- name: CLOSE_DATE
  expr: CLOSE_DATE
  data_type: DATE
  sample_values: ['2024-02-15', '2024-02-01', ...
  description: The date on which a sale was ...
  synonyms: [completion date, sale date, deal ...
measures:
- name: DEAL_VALUE
  expr: DEAL_VALUE
  data_type: FLOAT
  sample_values: ['75000', '25000', '150000', ...
  description: The total monetary value of a ...
  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