# **Lab Exercise 1 – Getting Started & Org Setup**

### **Objective**

By the end of this exercise, you will:

* Explore the **Data Cloud workspace**.
* Enable and validate **sample data**.
* Understand how to navigate **Data Explorer**.
* Create a **Permission Set** and compare it with profile-based access.

### **Step 1: Log in & Open Data Cloud**

1. Log in to your **Salesforce Data Cloud Developer Edition**.

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1. Click the **App Launcher (grid icon, top left)**.
2. Search for **Data Cloud** and select the **Data Cloud app**.

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### **Step 2: Explore the Data Cloud Workspace Tabs**

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**Explore each tab:**

* **Data Streams**
  + Check if any default sample streams (like CRM Starter Bundle) exist.
  + Note that data streams bring data from CRM, web, or external systems into the Data Cloud.

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* **Data Model**
  + Review the **Data Lake Objects (DLOs)**, **Data Model Objects (DMOs)**, and **Calculated Insight Objects (CIOs)**.
  + DLO → stores raw ingested data.
  + DMO → standardized representation (customer, account, engagement, etc.).
  + CIO → insights/aggregations based on data.

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* **Identity**
  + Preview where **Identity Resolution Rulesets** will be configured in later modules.
  + This is where duplicates across systems can be merged into “Golden Records.”

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* **Segments & Insights**
  + Segments: groups of customers based on rules/criteria.
  + Insights: aggregated metrics or KPIs derived from your data.
  + Just preview—don’t create anything yet.

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### **Step 3: Initialize Data Cloud**

1. Navigate to **Setup** (gear icon → Setup).

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1. From **Setup**, search for **Data Cloud Setup.**

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1. Under **Setup Data Cloud**, click **Get Started**. Click **Get Started**.
   * This initializes Data Cloud in your Developer Edition.
     + Creating your Data Cloud instance.
     + Setting up your metadata.
     + Initializing the **Customer 360 Data Model**.
     + Making sure everything is ready to go.

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1. Wait for a few minutes; records will begin to appear in Data Cloud.
2. Confirm under **Your Home Org Details** that the Data Cloud instance is live.

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1. Click on **Connect an Org** to add Salesforce orgs as data sources

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1. Here you can see all the orgs that we already connected to.  
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### **Step 4: Verify / Create Data Streams**

1. From the **App Launcher**, search for **Data Cloud** and open the **Data Cloud app**.

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1. Go to the **Data Streams** tab.

**Case A: Sample Streams are auto-provisioned**

* You’ll see pre-loaded streams such as the **Salesforce CRM Starter Bundle**.
* Check their status in **Run History** and confirm records exist.

**Case B: No Streams are provisioned**

* Click **New Data Stream**.

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* Select **Salesforce CRM** as the source.

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* Instead of **View Bundles**, click **View Objects**.

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* Select **Contact** (and optionally **Lead**).  
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* Assign Category = **Profile** in both **Contact** and **Lead**.  
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* Click **Next → Deploy**.

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* Check the status → it should move from *Processing* to *Active*.  
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1. Navigate to the **Data Explorer** tools to check for the new sample records. This confirms that the data has been ingested and is available for use.  
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