

Lab Exercise 1 – Getting Started & Org Setup

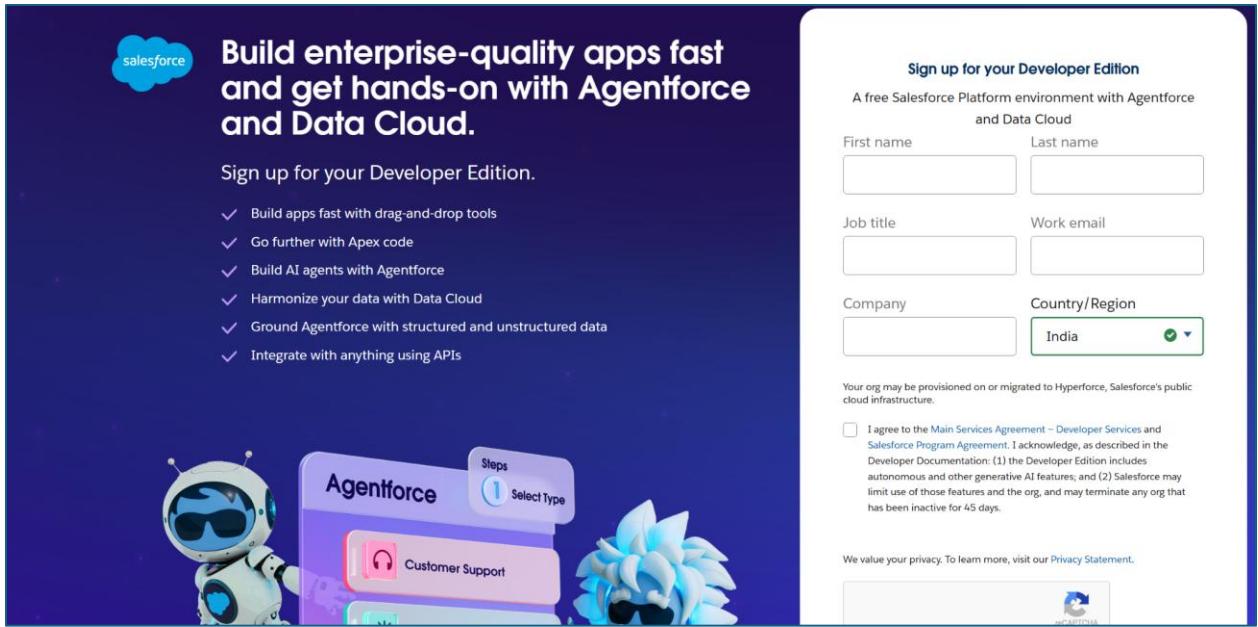
Objective

By the end of this exercise, you will:

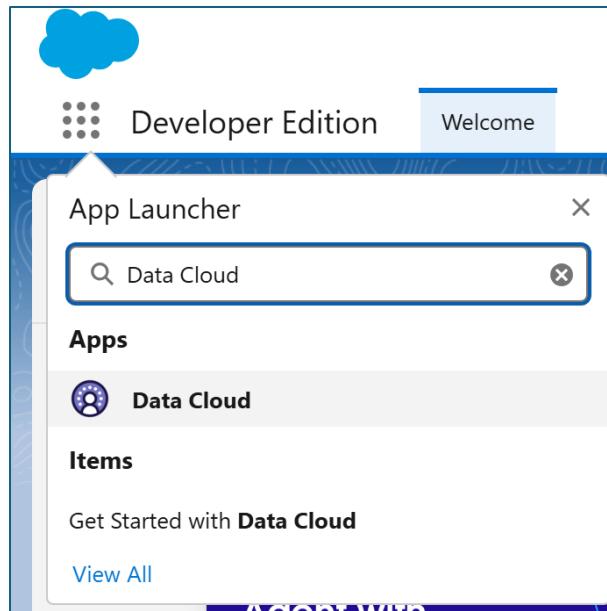
- Explore the **Data Cloud workspace**.
- Enable and validate **sample data**.
- Understand how to navigate **Data Explorer**.
- Create a **Permission Set** and compare it with profile-based access.

Step 1: Log in & Open Data Cloud

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



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



Step 2: Explore the Data Cloud Workspace Tabs

A screenshot of the Data Cloud workspace. The top navigation bar includes the Data Cloud icon, "Home" (which is active), "Data Streams", "Data Lake Objects", "Data Model", "Data Explorer", "Semantic Layer", "Identity Resolutions", "Profile Explorer", "Calculated Insights", "More", and a "New" button. The main content area has several sections: "Learn About Data Cloud" with links to "Welcome to Data Cloud", "Secure", "Transform", "Unify", "Explore", "Segment", "Act", and "About Data Cloud Basics"; "Get Started" with links to "Learn about Data Cloud with quick videos", "Find Data Cloud documentation", "Understand usage-based pricing", and "About Salesforce Data Cloud"; "Quarterly Performance" with metrics like "CLOSED \$0", "OPEN (>70%) \$0", "GOAL --", and "500k"; and an "Assistant" sidebar with a cartoon illustration of a landscape and the message "Nothing needs your attention right now. Check back later."

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.

● 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.

The screenshot shows the Data Cloud interface with the 'Calculated Insights' tab selected. The top navigation bar includes links for Home, Data Streams, Data Lake Objects, Data Model, Data Governance, Data Explorer, Einstein Studio, Semantic Layer, Identity Resolutions, Profile Explorer, Calculated Insights, Data Action Targets, and More. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Recently Viewed' and displays a table with columns for Calculated Insight Name, Data Space, Status, Last Run Time, Last Run Status, Schedule, Created By, Created Date, and Last Modified Date. A message indicates '0 items • Updated a few seconds ago'. There is also a 'Search this list...' field and a set of filter and sort icons.

- **Identity**

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

The screenshot shows the Data Cloud interface with the 'Identity Resolutions' tab selected. The top navigation bar includes links for Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Semantic Layer, Identity Resolutions, Profile Explorer, Segments, and More. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Recently Viewed' and displays a table with columns for Ruleset Name, Ruleset ID, Primary Data M..., Ruleset Status, Last Job Status, Source Profiles, Matched Sourc..., Total Unified Pr..., and Consolidation R... . A message indicates '0 items • Updated a few seconds ago'. There is also a 'Search this list...' field and a set of filter and sort icons.

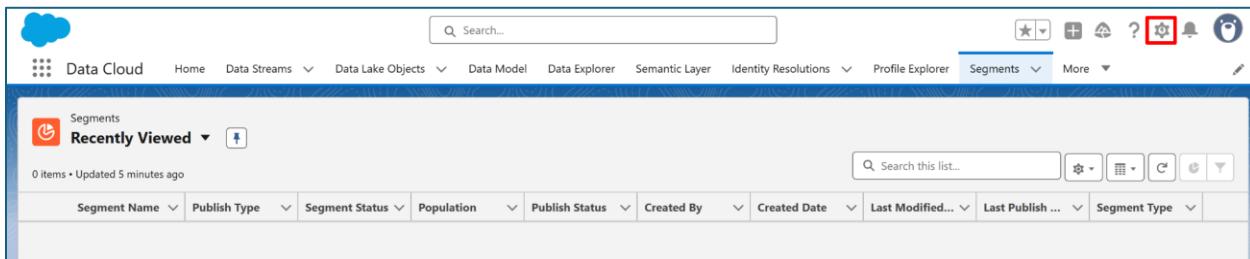
- **Segments & Insights**

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

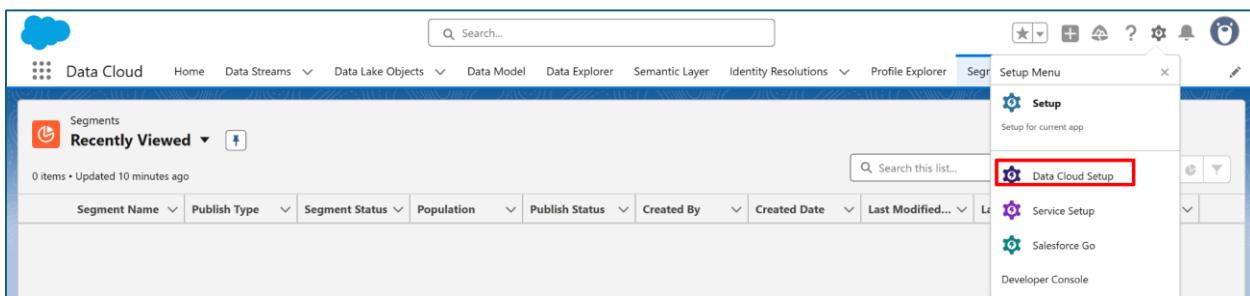
The screenshot shows the Data Cloud interface with the 'Segments' tab selected. The top navigation bar includes links for Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Semantic Layer, Identity Resolutions, Profile Explorer, Segments, and More. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Recently Viewed' and displays a table with columns for Segment Name, Publish Type, Segment St..., Population, Publish Status, Created By, Created Date, Last Modified..., Last Publish ..., and Segment Type. A message indicates '0 items • Updated a few seconds ago'. There is also a 'Search this list...' field and a set of filter and sort icons.

Step 3: Initialize Data Cloud

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

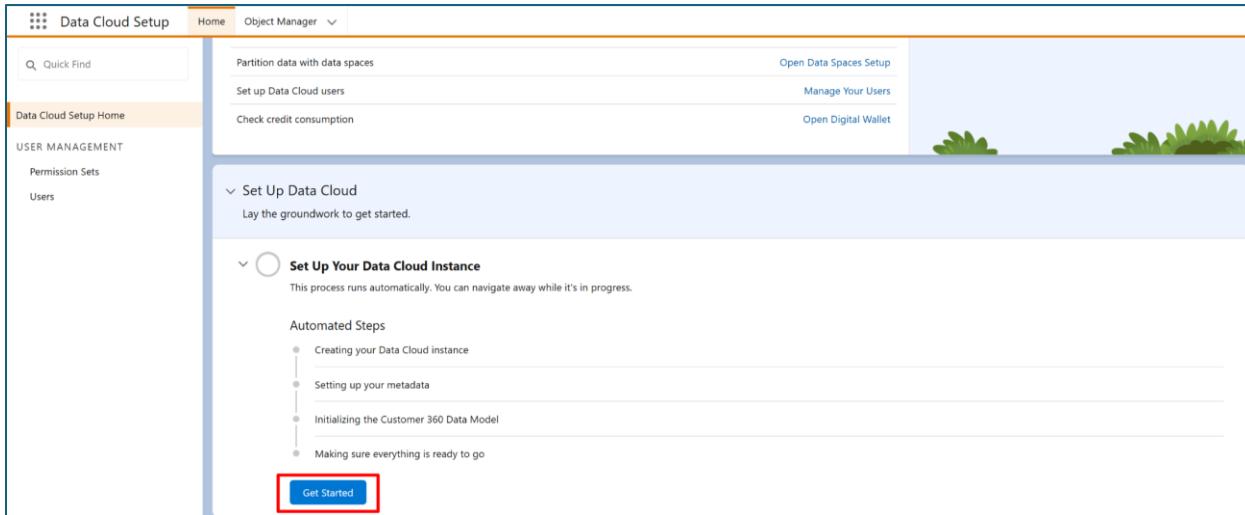


2. From **Setup**, search for **Data Cloud Setup**.

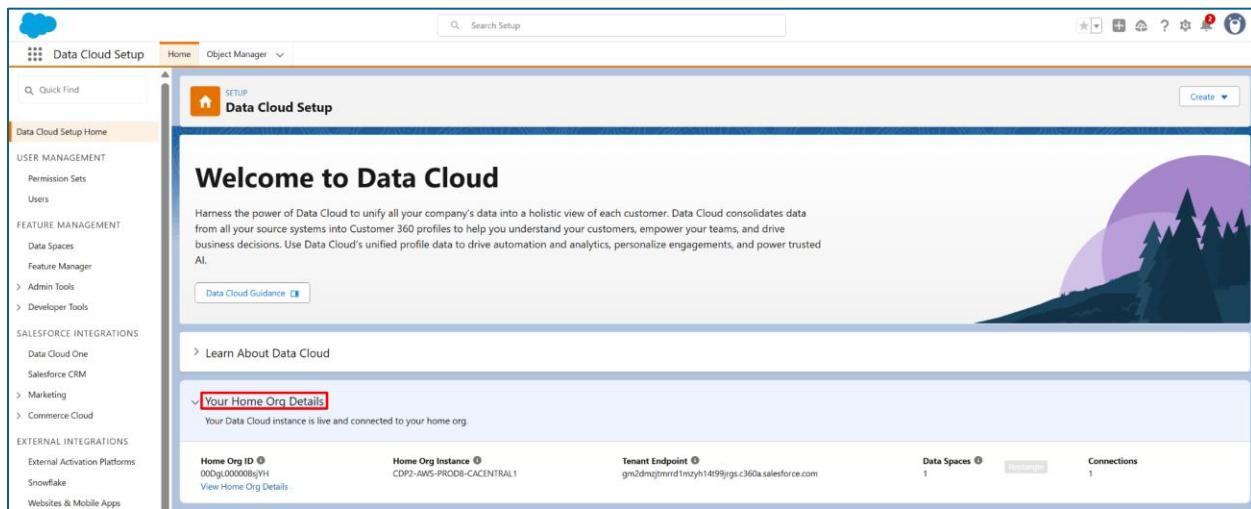


3. Under **Setup Data Cloud**, click **Get Started**. Click **Get Started**.

- 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.



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



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

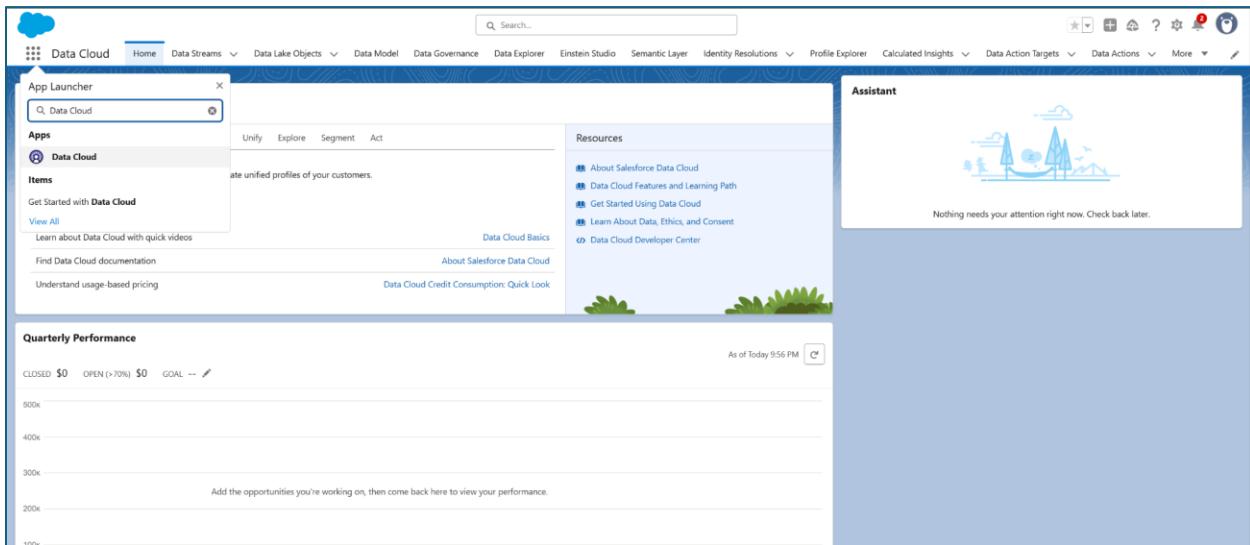
The screenshot shows the 'Data Cloud Setup' page. On the left, there's a sidebar with navigation links like 'Data Cloud Setup Home', 'USER MANAGEMENT', 'FEATURE MANAGEMENT', 'SALESFORCE INTEGRATIONS', and 'EXTERNAL INTEGRATIONS'. The main content area has a section titled 'Your Home Org Details' with details: Home Org ID (00Dg00000BjYH), Home Org Instance (CDP2-AWS-PROD8-CACENTRAL1), Tenant Endpoint (gm2dmzjlmnd1mzyh1499rgsc360a.salesforce.com), Data Spaces (1), and Connections (1). Below this, there are four steps: 'Set Up Data Cloud' (Lay the groundwork to get started), 'Assign User Permissions' (Give yourself and other users access to Data Cloud features and data), 'Connect Another Salesforce Org' (Connect additional Salesforce orgs as data sources with standard or companion connections. Companion connections share data back to the connected Salesforce org), and 'Connect Other Data Sources' (Ingest data from Marketing Cloud or Commerce Cloud, or from outside sources like Snowflake, Amazon S3, or Google Cloud Storage). A red box highlights the 'Connect Another Salesforce Org' button.

7. Here you can see all the orgs that we already connected to.

The screenshot shows the 'Salesforce CRM' setup page under 'Standard Connections'. The sidebar on the left includes 'Data Cloud Setup Home', 'USER MANAGEMENT', 'FEATURE MANAGEMENT', 'SALESFORCE INTEGRATIONS', and 'EXTERNAL INTEGRATIONS'. The main content displays a table for 'Standard Connections' with columns: Connection Name, Alias, Connection Status, Last Updated, and Org Id. One entry is listed: 'Salesforce_Demo' (Alias: Home, Status: Active, Last Updated: Sep 20, 2025, 09:14 PM, Org Id: 00Dg00000BjYH). Below this is a section for 'Standard Data Bundles' with a table showing bundles like Sales Cloud, Salesforce CDP CRM Loyalty, etc., along with their installed and latest versions. A red box highlights the 'New' button at the top right of the connections table.

Step 4: Verify / Create Data Streams

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



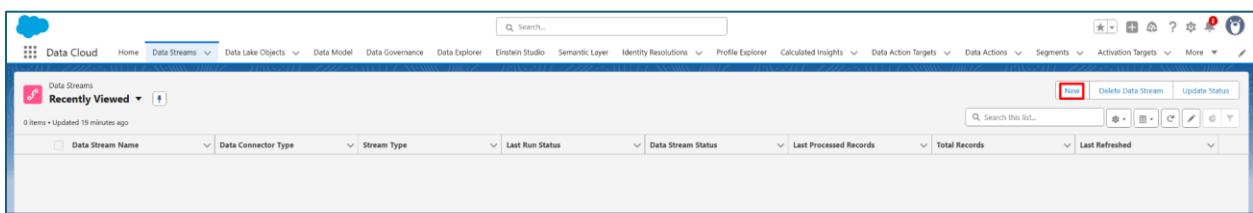
- Go to the **Data Streams** tab.

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**.



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

New Data Stream

Select the data source from which you can ingest or federate data. Only sources that are already connected to Data Cloud appear on this list. [Learn More](#)

Connected Sources

- Salesforce CRM Import objects from Salesforce CRM

Other Sources
Load a sample file in order to teach the system about your file's structure. At the end of this set up flow, you'll be able to specify where data should be retrieved from on an ongoing basis.

- File Upload upload file from your local drive
- Installed Data Kits & Packages import data streams from preconfigured data kits and packages.

Explore Other Connectors

Act! CRM Beta	Act-On Beta	ActiveCampaign Beta	Acumatica Beta	Adobe Analytics Beta
Ingest data from Act! CRM	Ingest data from Act-On	Ingest data from ActiveCampaign	Ingest data from Acumatica Cloud ERP	Ingest data from Adobe Analytics

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

New Data Stream

To ensure data is ingested from fields and objects created in the future, we recommend granting View All Fields (Global) system permission on the Data Cloud Salesforce Connector permission set. [Learn More](#)

Select an org to ingest data from, then select an object or data bundle.

* Salesforce Org Salesforce_Demo [View Bundles](#) View Objects

Salesforce Objects (976) 0 selected Search...

<input type="checkbox"/> Object Name ↓	<input type="checkbox"/> Object API Name	<input type="checkbox"/> Data Stream	<input type="checkbox"/> Is Custom Object
<input type="checkbox"/> Data Action Job Summary	DataActionJobSummary		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val AppointmentCategory n...	AppointmentCategoryFeed		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val AppointmentInvitation n...	AppointmentInvitationFeed		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val AppointmentTopicTimes...	AppointmentTopicTimeSlotFeed		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val CreditMemorandaApplcati...	CreditMemorandaApplicationFeed		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val DataCommCapActvTarg...	DataCommCapActvTargetFeed		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val DataObjSecondaryIndex...	DataObjSecondaryIndexFeed		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val DataSemanticSearch not...	DataSemanticSearchFeed		
<input type="checkbox"/> _MISSING LABEL_ Propertyfile - val DataSpace not found in ...	DataSpaceFeed		

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- Select **Contact** (and optionally **Lead**).

New Data Stream

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Select an org to ingest data from, then select an object or data bundle.

* Salesforce Org Salesforce_Demo [View Bundles](#) View Objects

Salesforce Objects (976) 1 selected Contact

<input checked="" type="checkbox"/> Object Name ↓	<input type="checkbox"/> Object API Name	<input type="checkbox"/> Data Stream	<input type="checkbox"/> Is Custom Object
<input type="checkbox"/> Account Contact Role	AccountContactRole		
<input type="checkbox"/> Activation Contact Point	MktSgmntActvtnContactPoint		
<input type="checkbox"/> Activation Contact Point Field	MktSgmntActvtnContactPField		
<input type="checkbox"/> Activation Contact Point Source	MktSgmntActvtnContactPSrc		
<input type="checkbox"/> Case Contact Role	CaseContactRole		
<input checked="" type="checkbox"/> Contact	Contact		
<input type="checkbox"/> Contact Center Channel	ContactCenterChannel		
<input type="checkbox"/> Contact Clean Info	ContactCleanInfo		
<input type="checkbox"/> Contact Feed	ContactFeed		

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New Data Stream

To ensure data is ingested from fields and objects created in the future, we recommend granting View All Fields (Global) system permission on the Data Cloud Salesforce Connector permission set. [Learn More](#)

Select an org to ingest data from, then select an object or data bundle.

Salesforce Org: Salesforce_Demo [View Bundles](#) [View Objects](#)

Salesforce Objects (976)

Object Name	Object API Name	Data Stream	Is Custom Object
<input checked="" type="checkbox"/> Lead	Lead	2 selected	Lead
<input type="checkbox"/> Lead Clean Info	LeadCleanInfo		
<input type="checkbox"/> Lead Feed	LeadFeed		
<input type="checkbox"/> Lead Status Value	LeadStatus		

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- Assign Category = **Profile** in both **Contact** and **Lead**.

New Data Stream

The object's category impacts how you can map it to data model objects. After saving the data stream, you can't change the category. [Learn More](#)

Data Cloud creates a data lake object (DLO) to store data from each Salesforce object in the data stream. Select an object to configure details for its related DLO. After saving the data stream, you can't change these configurations.

Search... [Contact Details](#)

Objects: Contact [Lead](#)

Data Lake Object Label: Contact_Home [Data Lake Object API Name: Contact_Home](#) [Data Stream Name: Contact_Home](#)

Object Category: Profile

Contact Fields (71): 71 fields selected [Search...](#) [New Formula Field](#)

Standard Fields (69): Custom Fields (2) Formula Fields (0)

Required	Field Name	Field Label	Field API Name	Data Type
1 <input checked="" type="checkbox"/>	Title	Title	Title	Text
2 <input checked="" type="checkbox"/>	System Modstamp	System Modstamp	SystemModstamp	DateTime (yyyy-mm-dd)
3 <input checked="" type="checkbox"/>	Salutation	Salutation	Salutation	Text
4 <input checked="" type="checkbox"/>	Reports To ID	Reports To ID	ReportsTold	Text
5 <input checked="" type="checkbox"/>	Pronouns	Pronouns	Pronouns	Text

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New Data Stream

The object's category impacts how you can map it to data model objects. After saving the data stream, you can't change the category. [Learn More](#)

Data Cloud creates a data lake object (DLO) to store data from each Salesforce object in the data stream. Select an object to configure details for its related DLO. After saving the data stream, you can't change these configurations.

Search... [Lead Details](#)

Objects: Contact [Lead](#)

Data Lake Object Label: Lead_Home [Data Lake Object API Name: Lead_Home](#) [Data Stream Name: Lead_Home](#)

Object Category: Profile

Lead Fields (67): 67 fields selected [Search...](#) [New Formula Field](#)

Standard Fields (62): Custom Fields (5) Formula Fields (0)

Required	Field Name	Field Label	Field API Name	Data Type
1 <input checked="" type="checkbox"/>	Website	Website	Website	URL
2 <input checked="" type="checkbox"/>	Title	Title	Title	Text
3 <input checked="" type="checkbox"/>	System Modstamp	System Modstamp	SystemModstamp	DateTime (yyyy-mm-dd)
4 <input checked="" type="checkbox"/>	Street	Street	Street	Text
5 <input checked="" type="checkbox"/>	Status	Status	Status	Text

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- Click **Next → Deploy**.

New Data Stream

Put the finishing touches on your data stream(s).

Data Space: default

Object Name	Category	Refresh Mode	Data Space Filtering
Lead_Home	Profile	Upsert	Set Filters
Contact_Home	Profile	Upsert	Set Filters

Frequently Asked Questions

What are data space filters?
Data space filters let you determine which records from the data lake object are available in the context of a data space.

What is a refresh mode?
After the initial data ingestion, you can opt to replace only the fields for which new data was received (partial refresh) or to replace the entire record with the data received (incremental refresh). When refresh mode is incremental, existing values can be replaced by blank values.

Deploy

- Check the status → it should move from *Processing* to *Active*.

Data Cloud Home Data Streams Data Lake Objects Data Model Data Governance Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights Data Action Targets Data Actions Segments Activation Targets More

Data Streams Recently Viewed

Data Stream Name	Data Connector Type	Stream Type	Last Run Status	Data Stream Status	Last Processed Records	Total Records	Last Refreshed
Contact_Home	Salesforce CRM	Ingest	None	Active			
Lead_Home	Salesforce CRM	Ingest	None	Active			

3. 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.

Data Cloud Home Data Streams Data Lake Objects Data Model Data Governance Data Explorer Einstein Studio Semantic Layer Identity Resolutions Profile Explorer Calculated Insights Data Action Targets Data Actions Segments Activation Targets More

Data Explorer Objects

Data Space: default Object: Data Lake Object: Contact_Home Total Columns: 76

Account ID	Assistant's Name	Asst. Phone	Birthdate	Business Fax	Business Phone	Buyer Attributes	cdp_sys_SourceVer...	Clean Status	Contact Description
001g000000GiqQAD			2/20/1956, 04:00 PM	(650) 450-8820	(650) 450-8810			Pending	
001g000000GiqYQAT				(336) 222-8000	(336) 222-7000			Pending	
001g000000GiqZQAT	Audrey Haynes	(212) 842-5589	12/18/1948, 05:00 PM	(212) 842-5501	(212) 842-5500			Pending	
001g000000GiqZQAT	Chris Nobel	(212) 842-5428	3/27/1939, 04:00 PM	(212) 842-5501	(212) 842-5500			Pending	
001g000000GiqZQAD								Pending	
001g000000GiqQAD			11/7/1947, 04:00 PM	(650) 867-9895	(650) 867-3450			Pending	
001g000000GiqWQAT	Jean Marie	(014) 427-4465		(014) 427-4428	(014) 427-4427			Pending	
001g000000GiqQAD			11/28/1953, 04:00 PM	(503) 421-7801	(503) 421-7800			Pending	
001g000000GiqQAD			6/2/1967, 05:00 PM	(650) 450-8820	(650) 450-8810			Pending	
001g000000GiqZQAD			12/24/1951, 04:00 PM	+44 191 4956620	+44 191 4956203			Pending	
001g000000GiqXQAT					(785) 241-6200			Pending	
001g000000GiqYQAT			4/23/1959, 04:00 PM	(312) 596-1500	(312) 596-1000			Pending	
001g000000GiqUQAT			5/25/1952, 05:00 PM	(512) 757-9000	(512) 757-6000			Pending	
001g000000GiqYQAT			7/4/1961, 05:00 PM	(312) 596-1500	(312) 596-1000			Pending	
001g000000GiqZQAT			1/31/1966, 04:00 PM	(212) 842-5501	(212) 842-5500			Pending	
001g000000GiqZQAT	Pat Feinstein	(212) 842-5464	4/15/1957, 04:00 PM	(212) 842-5501	(212) 842-5500			Pending	

The screenshot shows the Salesforce Setup interface for managing users. At the top left is a blue square icon with a white user profile symbol. To its right, the word "SETUP" is written in blue capital letters. Below this, the word "Users" is displayed in large, bold, black capital letters. Underneath the main title, there is a sub-section header "Permission Set Assignments" followed by a "Edit Assignments" button. A table lists five permission sets, each with a "Del" link next to it. The table has two columns: "Action" and "Permission Set Name".

Action	Permission Set Name
Del	Data Cloud Architect
Del	Agentforce Default Admin
Del	Prompt Template Manager
Del	Agentforce Service Agent Configuration
Del	Service Cloud User