Lab Exercise 11 — Create Calculated Insights Using Data Cloud

Objective

By the end of this hands-on, learners will:

- Use the **Calculated Insights Builder**.
- Write and preview a simple SQL aggregation.
- Activate an Insight and use it in Segmentation.

Step-by-Step Salesforce UI Procedure

Step 1 – Navigate to Calculated Insights

1. In the **Data Cloud** app → open **Insights** → **Calculated Insights**.

2. Click **New Calculated Insight** (top right).

Step 2 – Define Insight Properties

1. Enter:

    - **Name:** `Total Engagements per Customer`
    - **Description:** *Sum of engagement events for each customer.*
    - **Primary Object:** `Engagement Event`
    - **Output Object:** `Individual` (Customer Profile).

2. Click **Next**.

Step 3 – Define Query Logic

If you're using the **Visual Builder:**

1. Choose **Group By Field:** `IndividualId`

2. **Measure:** Count of Engagement Events (`EventId`)

3. Add a filter:

- **EngagementDate:** is within last 90 days.

4. Click **Preview** to validate the output.

If you're using **SQL Editor**, enter:

```
SELECT
   IndividualId,
   COUNT(EventId) AS TotalEngagements
FROM Engagement_Event
WHERE EngagementDate >= LAST_N_DAYS(90)
GROUP BY IndividualId
```

5. Click **Validate Query** → **Preview** results.

Step 4 – Save and Activate the Insight

1. Click **Save & Activate**.
2. Wait for status = **Active**.
3. You can now use this Calculated Insight in segments.

Step 5 – Use Calculated Insight in a Segment

1. Open **Segments** → **New Segment**.
2. Use your DMO: `Individual`.
3. Add filter:
   - **Field:** `TotalEngagements` (Calculated Insight).
   - **Operator:** >
   - **Value:** 5
4. Preview and Activate the segment.

Result: You've created a Calculated Insight and used it as a segment condition.