

Lab Exercise 8 — Activation & Automation (Segments + Flows)

Objective

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

- Build a new segment using the **Visual Segment Builder**.
- Use filter criteria and preview matched profiles.
- Understand segment activation and purpose in real-world use.

Step-by-Step Salesforce UI Procedure

Step 1 – Open the Segment Builder

1. Log into your **Salesforce Data Cloud Developer Edition**.
2. Click the **App Launcher (grid icon)** → Search and open **Data Cloud**.
3. In the left panel, click **Segments**.
4. Click **New Segment** (top right).

Step 2 – Define Segment Details

1. In the creation window, enter:
 - **Segment Name:** Active Customers - Last 30 Days
 - **Description:** *Profiles with engagement events in the past month.*
 - **Data Model Object (DMO):** Select Individual (or your main profile object).
2. Click **Next** to open the **Visual Segment Builder**.

Step 3 – Add Segment Criteria

1. Click **+ Add Criteria**.
2. Choose an **Engagement Event** as the related object.
3. Define your logic:
 - **Field:** EngagementDate
 - **Operator:** is within last
 - **Value:** 30 days
4. Add another condition:
 - **Field:** EngagementType
 - **Operator:** equals
 - **Value:** Web Visit
5. Combine with **AND** operator.

Step 4 – Add Additional Filter (Optional)

- Add condition: Country equals India or LoyaltyStatus equals Gold (if available in data).

Step 5 – Preview the Segment

1. Click **Preview** in the top-right corner.
2. Salesforce will show a list of profiles that match your filter.
3. Check the **Count of Matching Profiles**.
4. Review the data in the **Segment Preview Table**.

Step 6 – Activate the Segment

1. Click **Activate Segment** (top-right).
2. In the popup:
 - **Activation Target:** Select Salesforce Org (default for DE).

- **Activation Frequency:** Manual (Developer Edition).
3. Click **Activate**.

Step 7 – Verify Activation

1. Return to **Segments** list view.
2. Locate your segment — status should change from **Draft** → **Activated**.
3. Click into it → review **Activation Summary** and **Run History** tabs.

Result: You successfully created, previewed, and activated a Data Cloud Segment.