

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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- ✓ Go further with Apex code
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- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs



Sign up for your Developer Edition


A free Salesforce Platform environment with Agentforce and Data Cloud

First name	Last name
<input type="text"/>	<input type="text"/>
Job title	Work email
<input type="text"/>	<input type="text"/>
Company	Country/Region
<input type="text"/>	<input type="text" value="India"/>

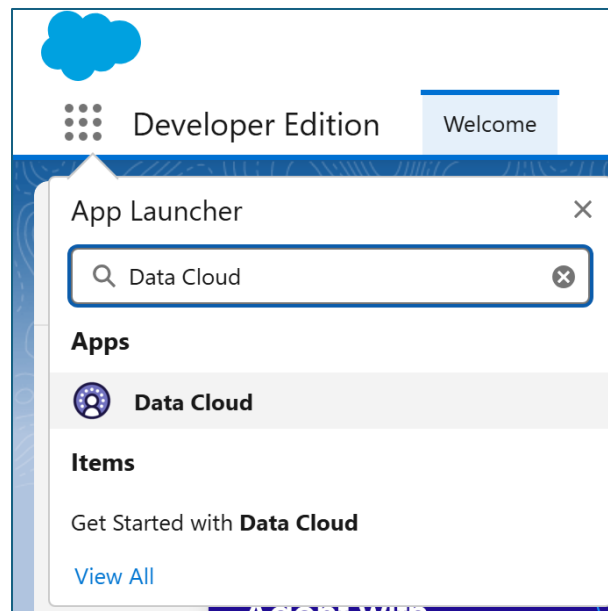
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the [Main Services Agreement – Developer Services and Salesforce Program Agreement](#). I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

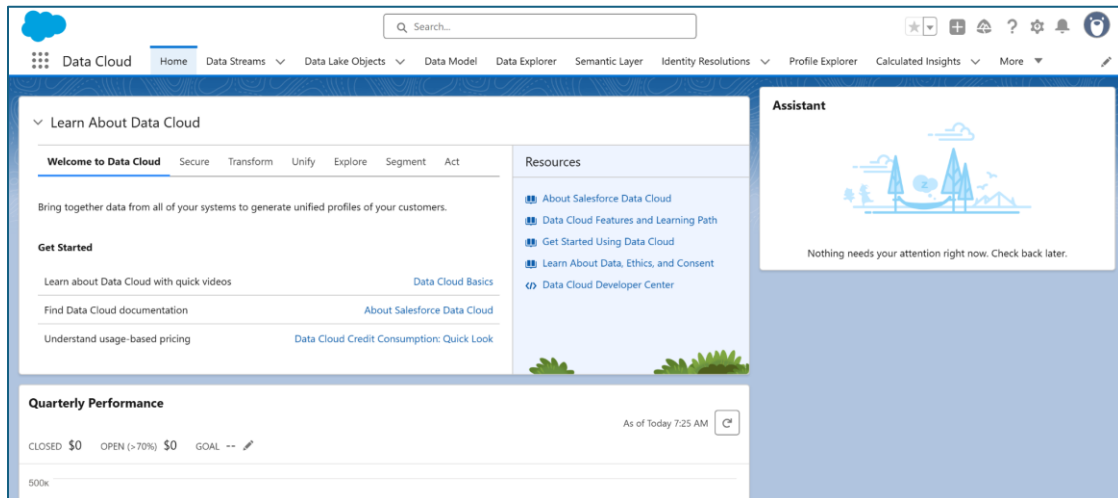
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2. Click the **App Launcher** (grid icon, top left).
3. Search for **Data Cloud** and select the **Data Cloud app**.



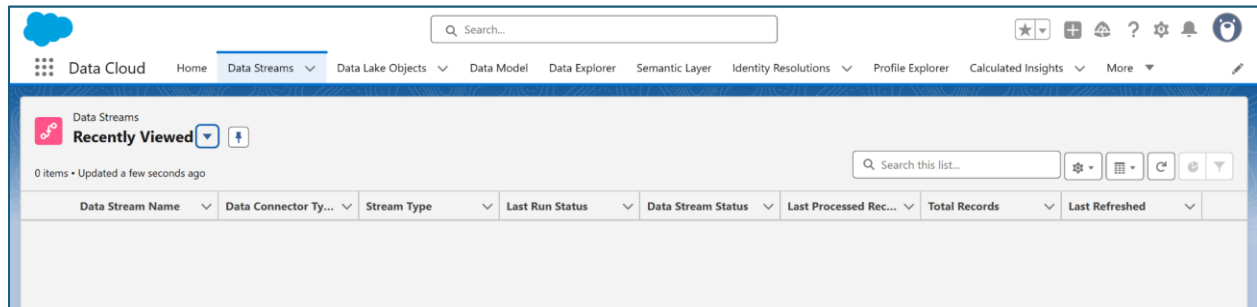
Step 2: Explore the Data Cloud Workspace Tabs



Explore each tab:

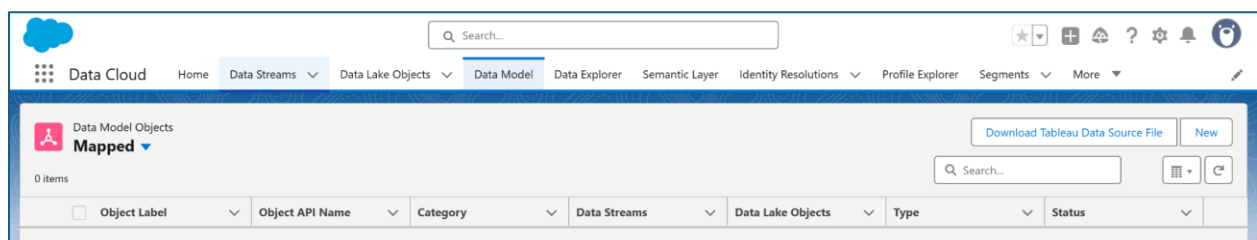
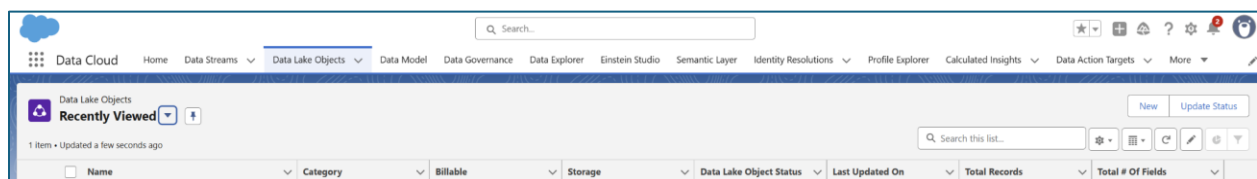
- **Data Streams**
 - Check if any default sample streams (like CRM Starter Bundle) exist.

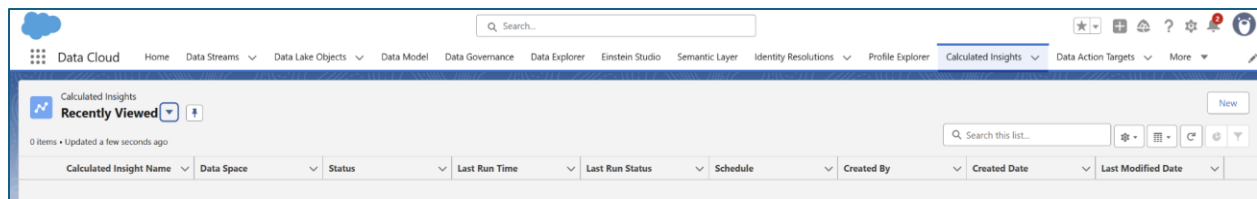
- Note that data streams bring data from CRM, web, or external systems into the Data Cloud.



- **Data Model**

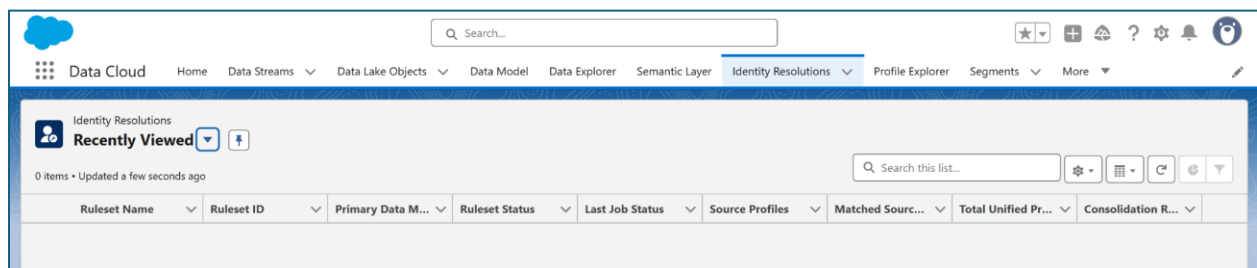
- Review the **Data Lake Objects (DLOs)**, **Data Model Objects (DMOs)**, and **Calculated Insight Objects (CIOs)**.
- DLO → stores raw ingested data.
- DMO → standardized representation (customer, account, engagement, etc.).
- CIO → insights/aggregations based on data.





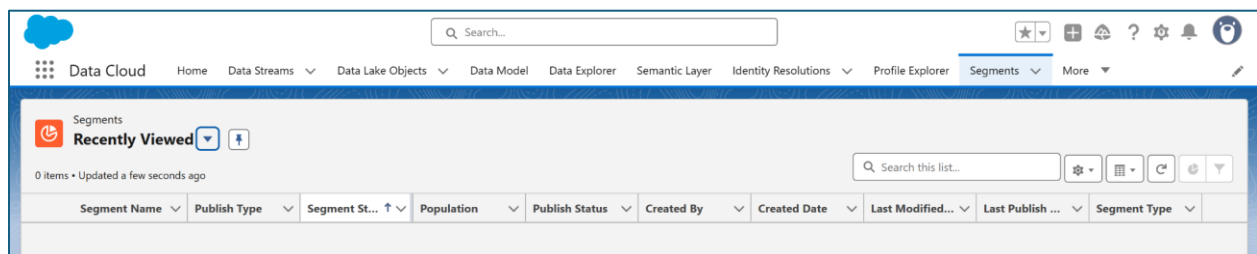
• Identity

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



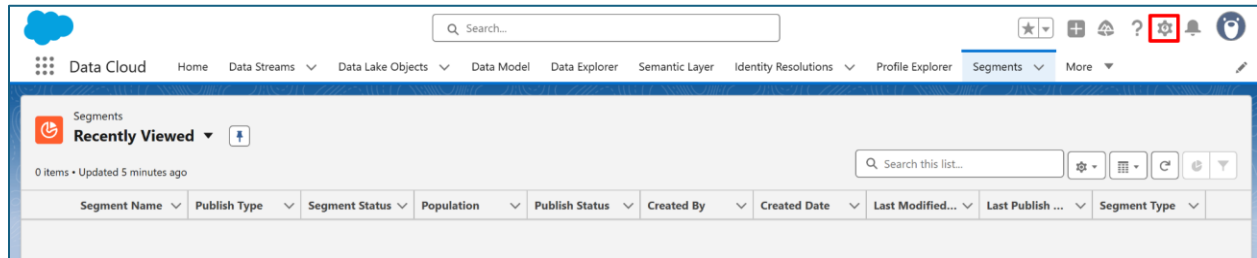
• Segments & Insights

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

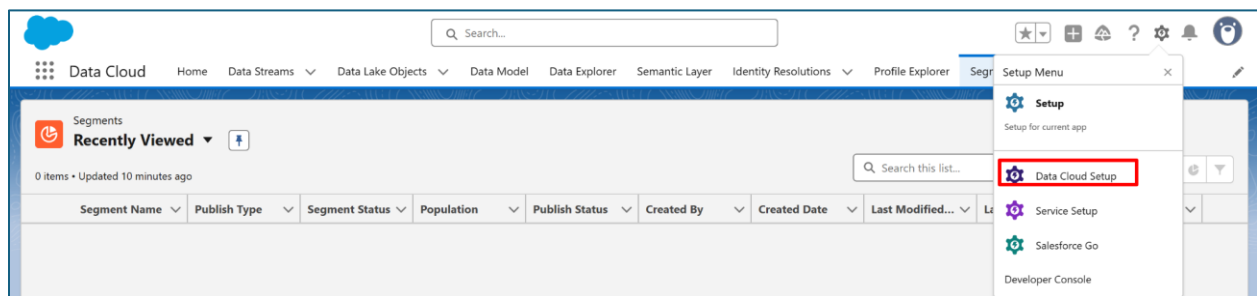


Step 3: Initialize Data Cloud

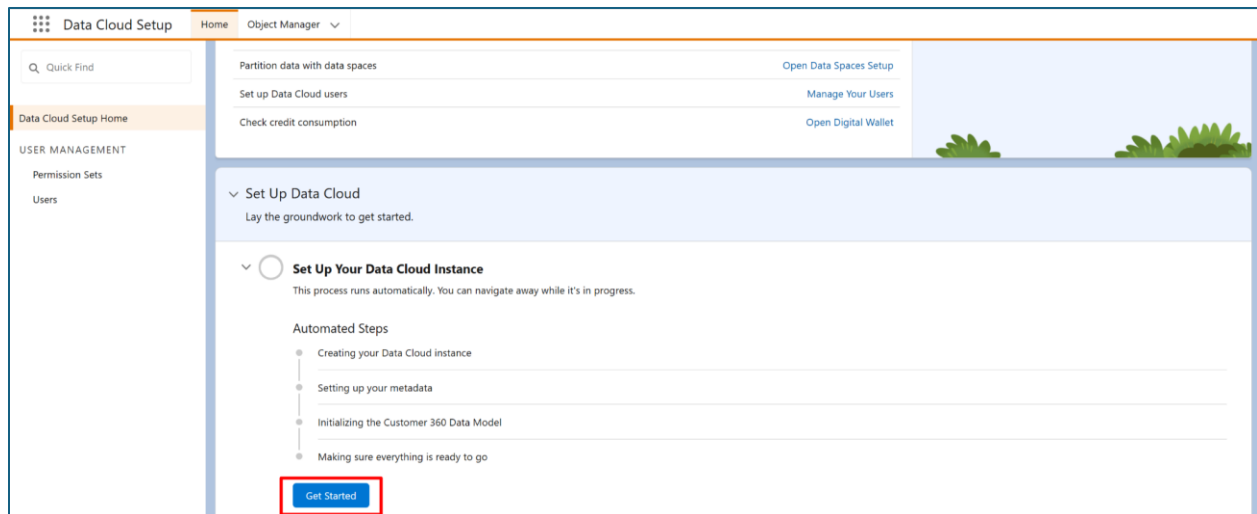
1. Navigate to **Setup** (gear icon → Setup).



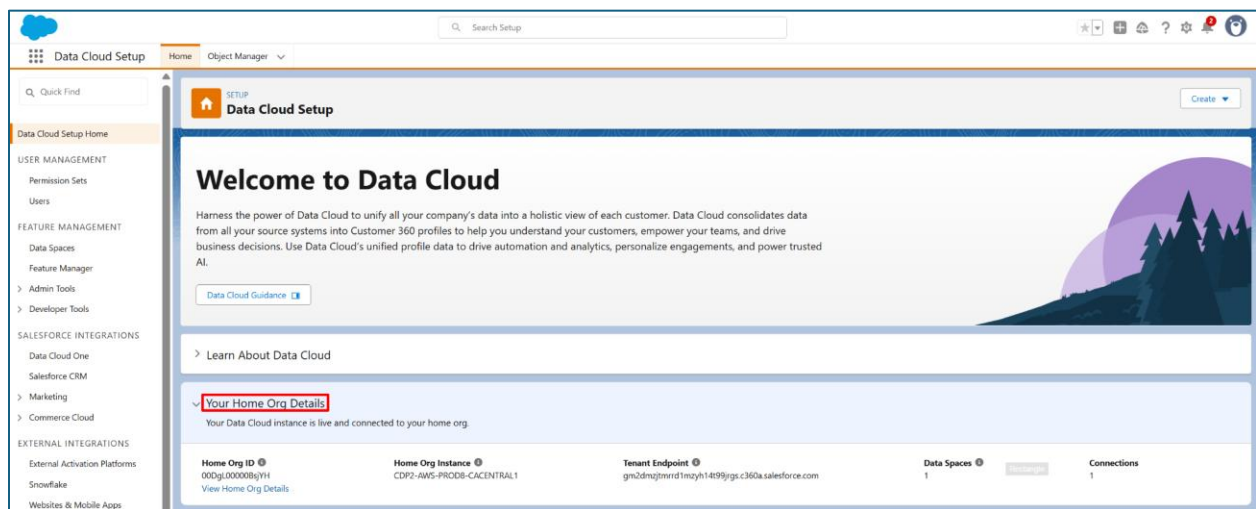
2. From **Setup**, search for **Data Cloud Setup**.



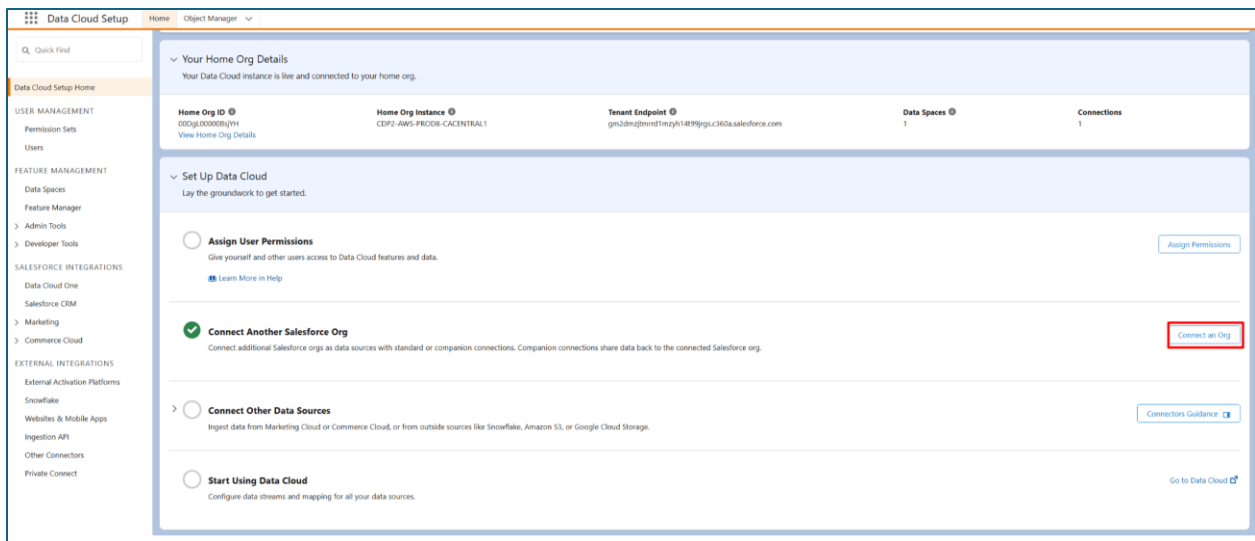
3. Under **Setup Data Cloud**, click **Get Started**. Click **Get Started**.
 - This initializes Data Cloud in your Developer Edition.
 - Creating your Data Cloud instance.
 - Setting up your metadata.
 - Initializing the **Customer 360 Data Model**.
 - Making sure everything is ready to go.



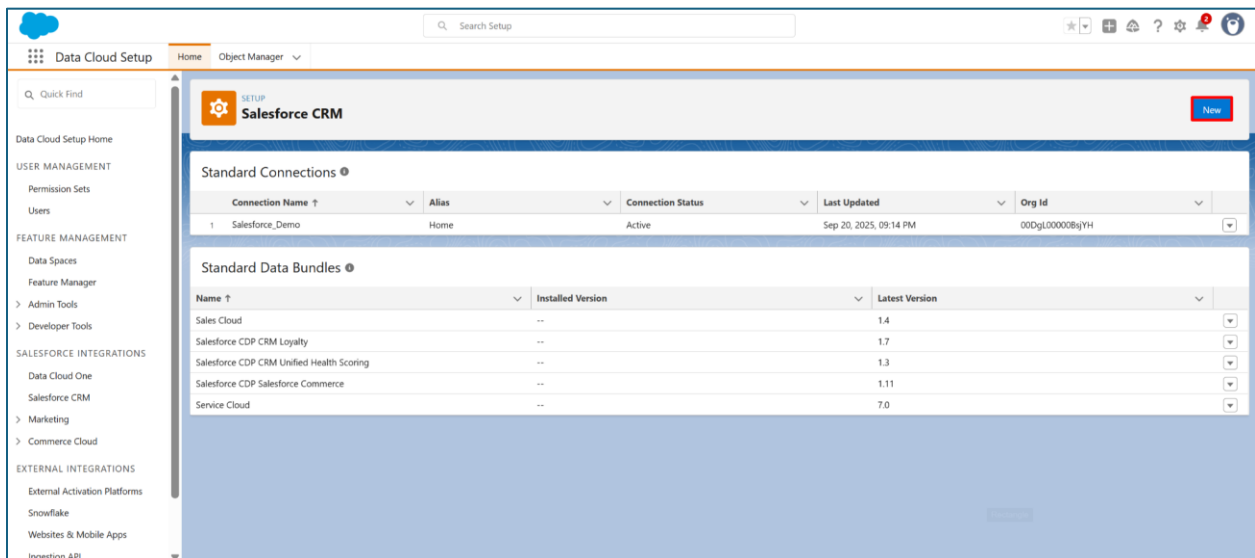
4. Wait for a few minutes; records will begin to appear in Data Cloud.
5. Confirm under **Your Home Org Details** that the Data Cloud instance is live.



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

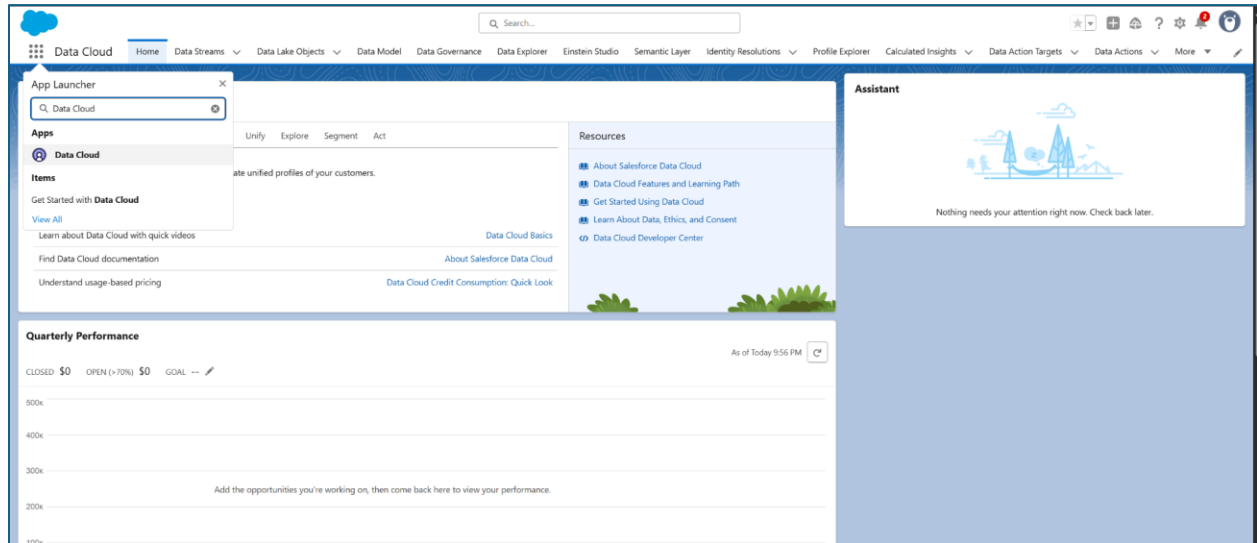


7. Here you can see all the orgs that we already connected to.



Step 4: Verify / Create Data Streams

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



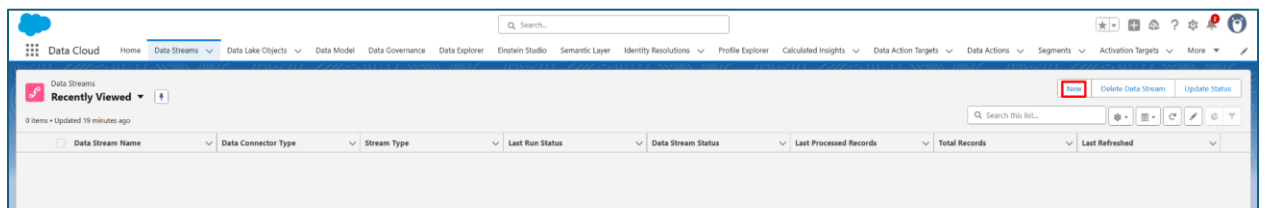
2. Go to the **Data Streams** tab.

Case A: Sample Streams are auto-provisioned

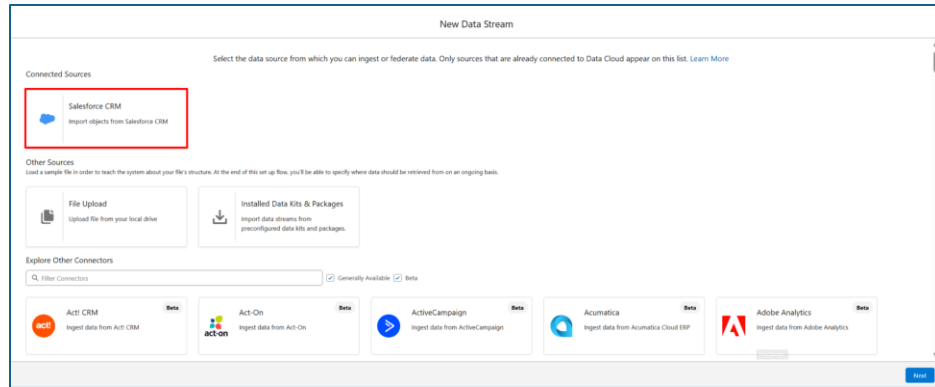
- You'll see pre-loaded streams such as the **Salesforce CRM Starter Bundle**.
- Check their status in **Run History** and confirm records exist.

Case B: No Streams are provisioned

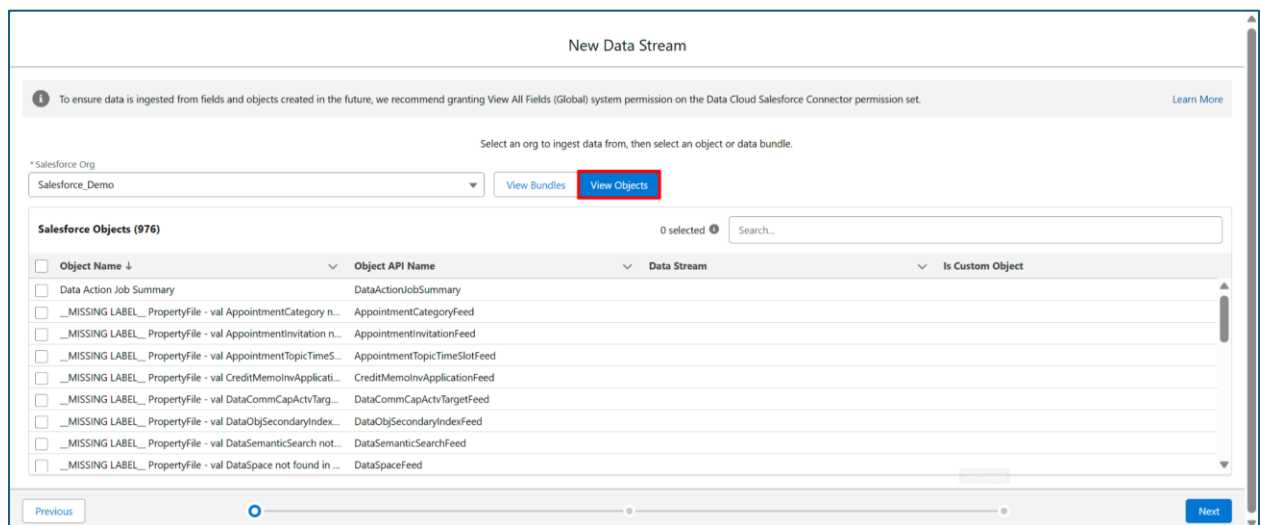
- Click **New Data Stream**.



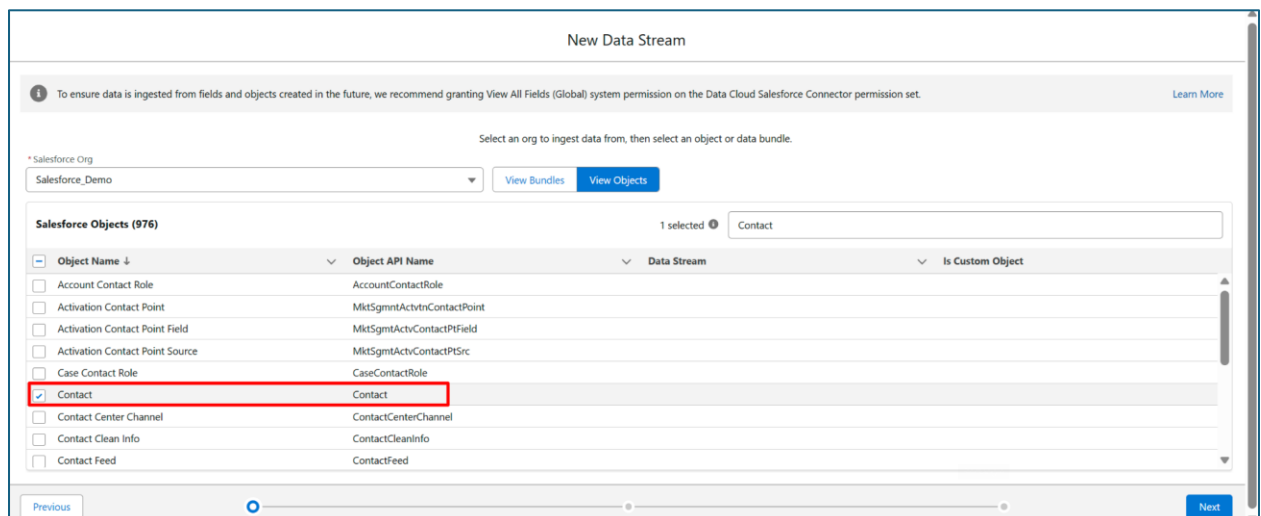
- Select **Salesforce CRM** as the source.



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



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



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) 2 selected Lead

Object Name	Object API Name	Data Stream	Is Custom Object
<input checked="" type="checkbox"/> Lead	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...

Objects
Contact
Lead

Contact Details

*Data Lake Object Label Contact_Home *Data Lake Object API Name Contact_Home *Data Stream Name Contact_Home

*Object Category Profile *Primary Key Contact ID

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

Standard Fields (69)	Custom Fields (2)	Formula Fields (0)
<input checked="" type="checkbox"/> Required		
1 <input checked="" type="checkbox"/>	Field Name	Field Label
2 <input checked="" type="checkbox"/>	Title	Title
3 <input checked="" type="checkbox"/>	System Modstamp	System Modstamp
4 <input checked="" type="checkbox"/>	Salutation	Salutation
5 <input checked="" type="checkbox"/>	Reports To ID	Reports To ID
6 <input checked="" type="checkbox"/>	Pronouns	Pronouns

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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...

Objects
Contact
Lead

Lead Details

*Data Lake Object Label Lead_Home *Data Lake Object API Name Lead_Home *Data Stream Name Lead_Home

*Object Category Profile *Primary Key Lead ID

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

Standard Fields (62)	Custom Fields (5)	Formula Fields (0)
<input checked="" type="checkbox"/> Required		
1 <input checked="" type="checkbox"/>	Field Name	Field Label
2 <input checked="" type="checkbox"/>	Website	Website
3 <input checked="" type="checkbox"/>	Title	Title
4 <input checked="" type="checkbox"/>	System Modstamp	System Modstamp
5 <input checked="" type="checkbox"/>	Street	Street
6 <input checked="" type="checkbox"/>	Status	Status

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- Click **Next** → **Deploy**.

New Data Stream

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

* Data Space: default

This bundle creates 2 data stream(s) and data lake object(s).

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 Streams

2 items • Updated a few seconds ago

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

- 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 Explorer

Objects

* Data Space: default

Object: Data Lake Object Contact_Home

Total Columns: 76

Date and time values use your time zone settings.

	Account ID	Assistant's Name	Asst. Phone	Birthdate	Business Fax	Business Phone	Buyer Attributes	cdp_sys SourceVer...	Clean Status	Contact Description
	001gl.000000GigqQAD			2/20/1956, 04:00 PM	(650) 450-8820	(650) 450-8810			Pending	
	001gl.000000GigqWQAT				(336) 222-8000	(336) 222-7000			Pending	
	001gl.000000GigqZQAT	Audrey Haynes	(212) 842-5589	12/18/1948, 05:00 PM	(212) 842-5501	(212) 842-5500			Pending	
	001gl.000000GigqZQAT	Chris Nobel	(212) 842-5428	3/27/1939, 04:00 PM	(212) 842-5501	(212) 842-5500			Pending	
	001gl.000000GigqQAD								Pending	
	001gl.000000GigqQAD			11/7/1947, 04:00 PM	(650) 867-9895	(650) 867-3450			Pending	
	001gl.000000GigqWQAT	Jean Marie	(014) 427-4465		(014) 427-4428	(014) 427-4427			Pending	
	001gl.000000GigqQAD			11/28/1953, 04:00 PM	(503) 421-7801	(503) 421-7800			Pending	
	001gl.000000GigqQAD			6/2/1967, 05:00 PM	(650) 450-8820	(650) 450-8810			Pending	
	001gl.000000GigqQAD			12/24/1951, 04:00 PM	+44 191 4956620	+44 191 4956203			Pending	
	001gl.000000GigqWQAT					(785) 241-6200			Pending	
	001gl.000000GigqWQAT			4/23/1959, 04:00 PM	(312) 596-1500	(312) 596-1000			Pending	
	001gl.000000GigqWQAT			5/25/1952, 05:00 PM	(512) 757-9000	(512) 757-6000			Pending	
	001gl.000000GigqWQAT			7/4/1961, 05:00 PM	(312) 596-1500	(312) 596-1000			Pending	
	001gl.000000GigqZQAT			1/31/1966, 04:00 PM	(212) 842-5501	(212) 842-5500			Pending	
	001gl.000000GigqZQAT	Pat Feinstein	(212) 842-5464	4/15/1957, 04:00 PM	(212) 842-5501	(212) 842-5500			Pending	



SETUP

Users

Permission Set Assignments

Edit Assignments

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