

US Bank - AJO Orchestrated Campaign...

US Bank - AJO Orchestrated Campaigns Lab - April 26

1. Orchestrated Campaigns

1.1. Access

1.2. Lab Resources

1.3. Data Foundation

1.3.1. Relational Based XDM

1.3.2. Data Ingestion

1.4. Campaign Workflows

1.4.1. Build a Workflow

1.4.2. Scheduling, Debugging, Testing

1. Orchestrated Campaigns

Agenda:

AJO Orchestrated Campaigns – Hands-on Lab Agenda

Intros, User Access and Lab Overview | 20 min

Intro & login	Adobe team introduction. Participants to log in to demo environment and confirm access
Lab use case	Adobe provides an industry-centric marketing use case to outline common challenges & opportunities and how Adobe Journey Optimizer Orchestrated Campaigns will solve and/or improve brand objectives

Understand Core Capabilities | 30 min

On-demand audiences	Query audiences in real-time to build campaign workflows and leverage them across email, SMS, push, and DM.
Multi-entity segmentation & sending	- Go beyond person-based campaigns—use entities like product catalogs, store locations, or service data to target with precision. - Support multi-level sending, where one message is sent per Profile and per associated secondary entity.
Pre-send visibility & precision	Get exact segmentation counts and full campaign scope before launch, ensuring accuracy and confidence.
Multi-step campaign workflows	Design multi-steps campaigns from daily messages to complex campaigns like seasonal promotions or major product launches.

Learn How to Build | 130 min

Relational data model	How to create a relational XDM schema and relate to different entities
Data ingestion	How to ingest information into different relational XDM datasets
Activation workflows	- How to query from a secondary entity (Like, bookings, purchases, products) to formulate a person-based campaign - How to query from a primary entity like a recipient and enrich their activation delivery with information from secondary entities.

AJO Orchestrated Campaigns – Hands-on Lab Agenda

- Learn some of the most used orchestration workflow nodes (Like build audience, splits, forks, joins)

TOTAL HoL TIME: 3 hours, 10-15 min breaks included throughout session

1.1. Access

Accessing the Experience platform

- Use Chrome or Firefox.
- **Sign-out from all Adobe instances** that might be open.
- Do **NOT** use your own credentials to access the demo instance for this lab. Instead, you'll use specific credentials provided in this document.

Hands-on Lab URLs

<https://experience.adobe.com/> Experience Cloud Home Page

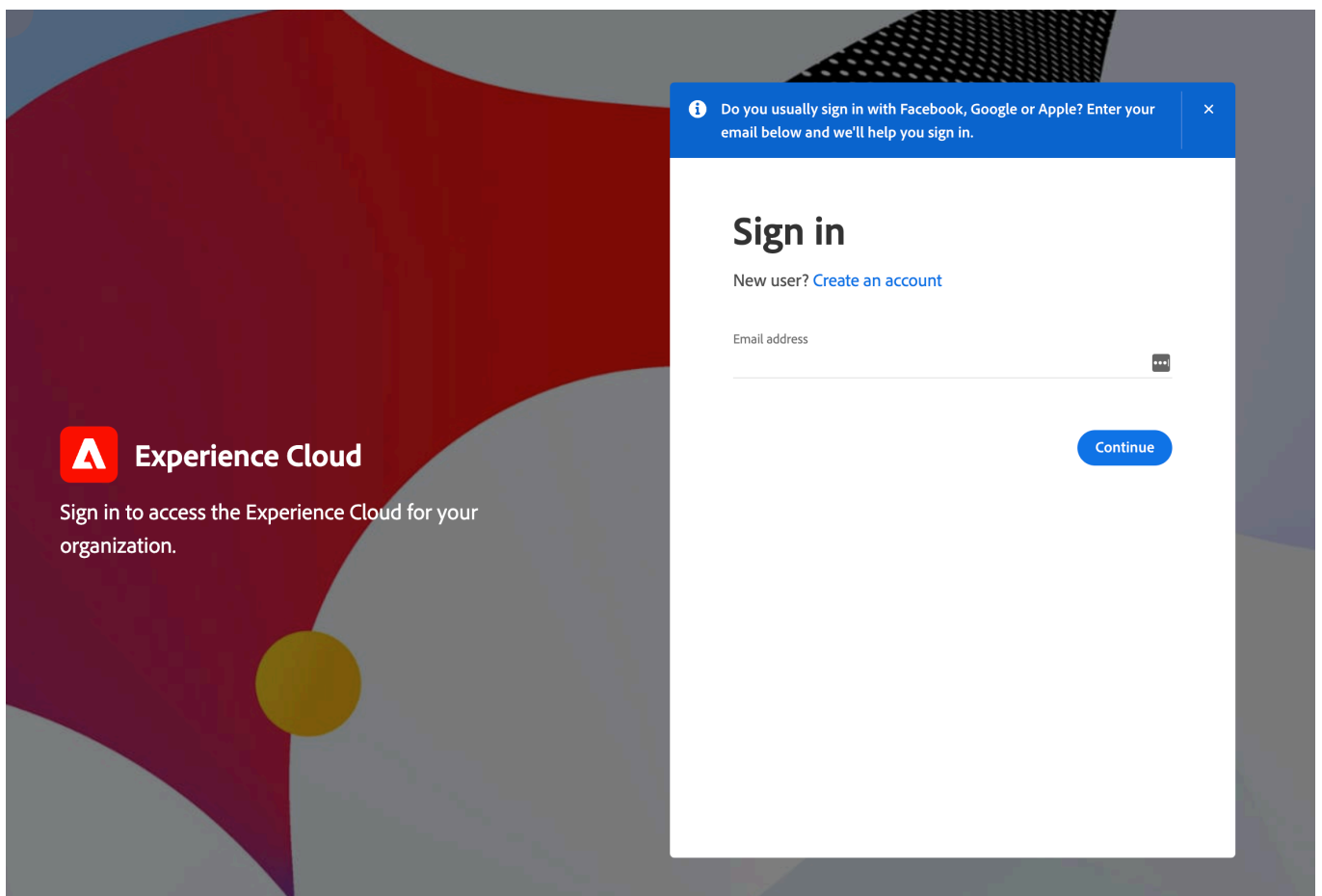
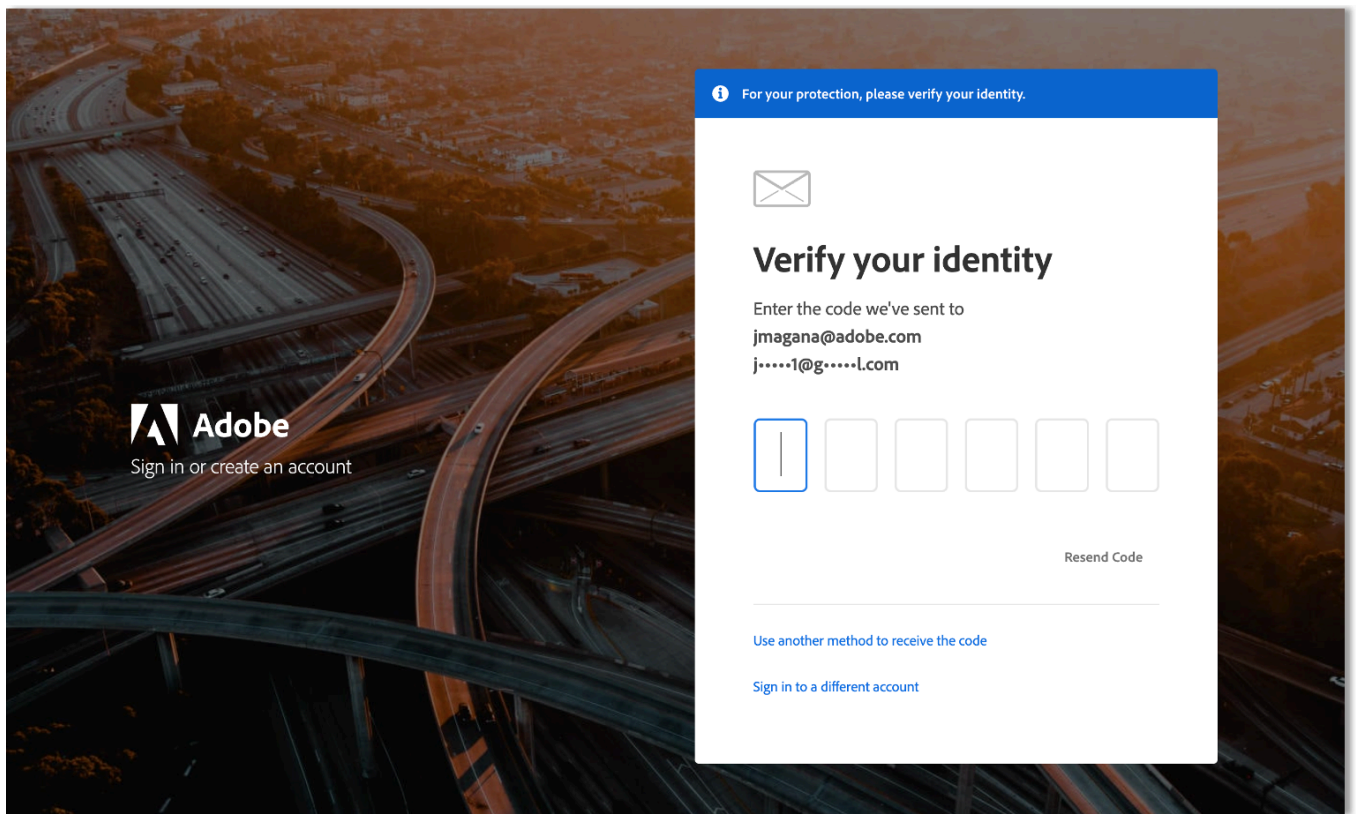
<https://platform.adobe.com/> Opens Experience Platform Directly

Your user information

Password:

- ⚠ If asked to send a verification code, please proceed. You should see a screen like this. Please give a few minutes and we will provide you the verification code via the chat per your username as assigned on the credentials table above.

Do not enter your mobile number, if prompted.



If you're asked to add in any additional data or to add a mobile number as part of your sign-in, **please ignore these prompts** and if allowed skip or otherwise ignore or complete

the step with the defaults. If you have problems logging in, alert your presenter immediately.

After Successful Login

Adobe Experience Cloud

Search Experience Cloud (36+)

adobe-demo-americas-275

Good morning, Juan!

Recents

NAME	TYPE	STATUS	CREATED BY	MODIFIED ON
Demo System - Event Dataset for Website (Global v1)	Dataset	-	33b84e8-cf71-4278-a558-8b738dfb397...	June 28, 2023
DG - Scenario 1 - Triggered Offer	Journey	Draft	Rishabh Vinod	June 28, 2023
DG - Scenario 2 - Cross Channel Journey	Journey	Draft	Rishabh Vinod	June 28, 2023
DG - Scenario 5 - Coupon Personalization	Journey	Draft	Rishabh Vinod	June 28, 2023
Web Events Dataset v0	Dataset	-	15f4d217-7297-4605-be5d-d2c0ba4dc43...	June 27, 2023

Show more

Quick access

View all

Admin (Beta)

Audience Manager

Experience Manager Assets

Privacy UI

Admin Console

Customer Journey Analytics

Experience Platform

Software Distribution

Analytics

Data Collection

Journey Optimizer

System Status

App Builder Catalog

Experience Manager

Permissions

Target

1.2. Lab Resources

Lab Recording, Resources & Survey

Your post-lab page for content, recording, helpful links to product documentation, and our survey.

Adobe Experience Platform Documentation

[Experience League Documentation](#)

Orientation Presentation

 [US Bank - AJOCO_HOL - APR 2026 HOL.pdf](#)



Orientation Recording

2:55:11

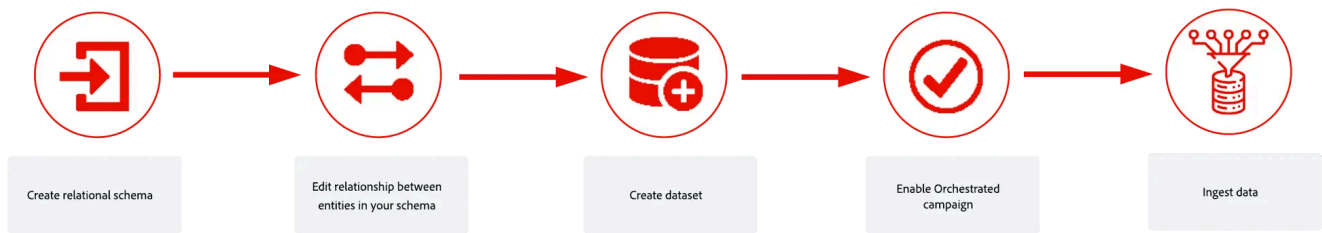
Lab Survey

<https://forms.microsoft.com/r/0CkJZgmvVT>

**US Bank - Adobe Journey
Optimizer Orchestrated Campaign
Lab - April 15, 2026**



1.3. Data Foundation



A **Relational-based schema** is the formal definition of the model-based data model.

It specifies:

- The set of tables
- The columns in each table
- The constraints
- The relationships across tables

Organizing schemas or tables in a model-based data model is about structuring your data into multiple tables. Ensure each table stores one type of entity/schemas.

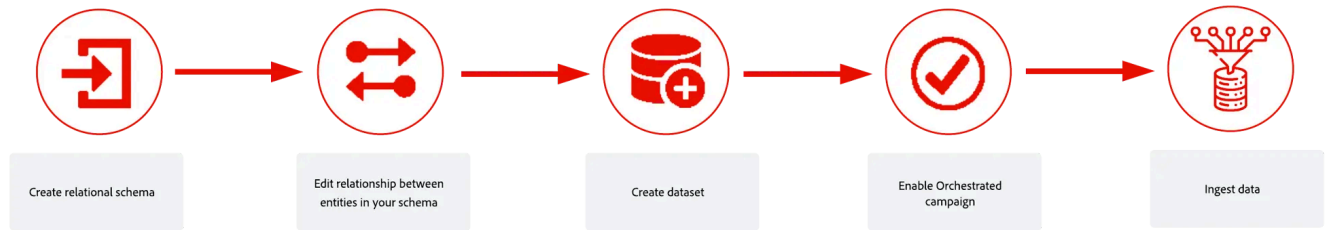
There are 2 ways to create a **Relational-based schema**. We will only cover the fastest way which is using a DDL file. If you are interested on how to create manually, then visit this [page](#). Otherwise, check the steps below to see how straight forward it is from a Data Management perspective.



Data Ingestion for the most part remains the same for AJOCO. The following Sources are supported for use with Orchestrated campaigns:

Type	Source
Cloud Storage	<u>Amazon S3</u>
	<u>Google Cloud Storage</u>
	<u>SFTP</u>
Cloud Data Warehouses	
	<u>Snowflake</u>
	<u>Google BigQuery</u>
	<u>Data Landing Zone</u>
	<u>Azure Databricks</u>
File-Based Uploads	
	<u>Local File Upload</u>

1.3.1. Relational Based XDM



✓ Lab Material

Sample DDL

You can either download the file or copy the contents and save it in a note pad (notepad++, notes, textEdit, etc) with the extension .ddl.

 [campaign_file.ddl](#)



```
-- =====
-- CAMPAIGN_MEMBERSHIP_FILE
-- Ad-hoc campaign history / suppression file for OC
-- (external offers history, non-Adobe)
-- =====

CREATE TABLE CAMPAIGN_MEMBERSHIP (
    CustomerID    VARCHAR(64)    NOT NULL, -- logical FK -> CUSTOMER_FILE.CustomerID
    CampaignID    VARCHAR(64)    NOT NULL, -- e.g. 'BUSINESS_CHECKING_OFFER'
    Channel       VARCHAR(64)    , -- 'EMAIL', 'DIRECT_MAIL', etc.
    SendDate      DATE           NOT NULL, -- date of the send

    -- Version column (required) for OC version descriptor
    LastModified  TIMESTAMP      NOT NULL,

    -- Composite PK: same customer can be in multiple campaigns and dates
    CONSTRAINT PK_CAMPAIGN_MEMBERSHIP_FILE
        PRIMARY KEY (CustomerID, CampaignID, SendDate)
);
```

✓ Exercise

Upload Your DDL

- Under **Data Management**, click **Schemas**.
- Click **Create Schema**
- Select the option **Relational Schema**
- Select the option **Upload DDL File**
- Drag and Drop your DDL File, Click **Next**

Create a relational schema

Select an option to create a relational schema *

☐
**Create manually**
Build schema by manually adding fields

☒
**Upload DDL file**
Import a DDL file to define an entity relationship diagram and create schemas

 [View all DDL import jobs](#)

Choose files

Entities and Fields to Import

We are creating a flat table with a Primary Key without relatable entities or identity namespaces (we will connect this data to a profile during our campaign workflow). However, we must do a few things here:

- Add your initials to the dataset name so every participant has a different table of their own. "CAMPAIGN_MEMBERSHIP_INITIALS"
- Select the **LastModified** as the version column.
- Click Done.

Select entities and fields to import 1 table, 26 columns selected Cancel Done

Selected tables
Each selected table will create a schema containing selected columns. Configure each schema and its columns.

uct_bookings_u99
26 of 26 columns selected

Schema properties
Schema name * Description
Column selection
Select columns that you want to import as fields into your schema

SQL column	SQL Type	Relationship	Field label	Type	Identity	Field type	Version ID	Key
X bookingNu...	STRING	0	bookingNumber	String		☒ Required	☐ Versioning	☒ Primary key
X version	NUMBER (38, 0)	0	version	Integer		☒ Required	☒ Versioning	☐ Primary key
X emailAddress	STRING	0	emailAddress	String	Email	☒ Required	☐ Versioning	☐ Primary key
X firstName	STRING	0	firstName	String		☐ Required	☐ Versioning	☐ Primary key
X lastName	STRING	0	lastName	String		☐ Required	☐ Versioning	☐ Primary key
X productLine	STRING	0	productLine	String		☐ Required	☐ Versioning	☐ Primary key

1.3.2. Data Ingestion



✓ Lab Material

You can either download the file or copy the contents and save it in a note pad (notepad++, notes, textEdit, etc) with the extension .csv.



CAMPAIGN_MEMBERSHIP_FILE.csv



CustomerID, CampaignID, Channel, Date, LastModified

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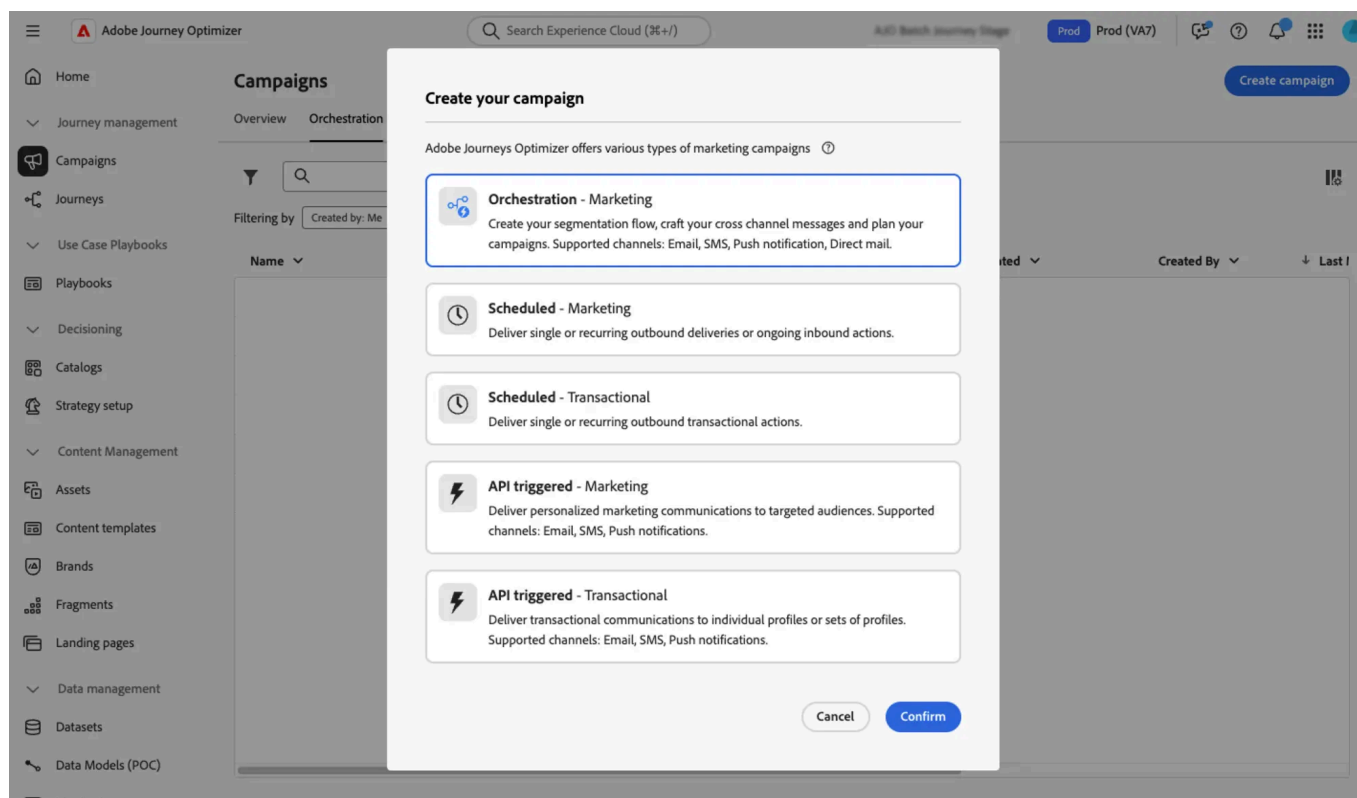
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✓ Exercise

Configure a Data Flow

- Go to **Sources** under **Catalog** from the **Navigation**.
- In the catalog: Search for **Local File Upload**
- Click **Add Data**
- Click the **toggle** under **Change data Capture**
- Select the **dataset** you created under your initials
- Click Next
- Drag and Drop **your csv** file. Click Next. Click Finish.

1.4. Campaign Workflows

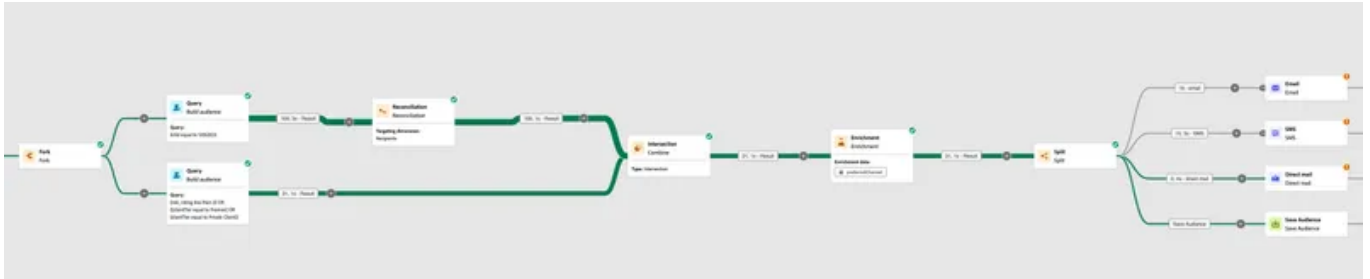


- Under Journey Management, click **Campaigns**
- Click **Create** campaign
- Select Orchestration - Marketing, and click **confirm**
- Type campaign name **AJOCOLAB-U#**, click **Save**

Activity Nodes

Orchestrated campaign activities in Adobe Journey Optimizer empower you to design seamless, data-driven marketing journeys that connect with your audience at the right time and through the right channels. By combining targeting, channel, and flow control activities, you can define precise audience segments, personalize messages, and automate complex workflows. Whether you're building audiences, synchronizing campaign branches, or adding delays for perfect timing, these activities work together to streamline your campaign execution. With tools like Enrichment for data enhancement or Split for audience segmentation, you'll have a flexible toolkit to create meaningful, impactful customer experiences. More information about [Activities](#).

1.4.1. Build a Workflow



✓ Lab Use Case

Target business customers who have a business card but not a business checking account

- Identify all business customers that have a business credit card and do not have a checking account **(Customer and Account Dimensions have been defined)**
- Suppress all business customers who have received a business checking offer in the past 6 months. This status is determined from the campaign history logs stored in the cloud. **(Your Campaign File Dimension's column: Date and CampaignIDs)**
- Stratify customers based on their credit card usage. Create multiple "cells" or sub-audiences based on the card usage stratifications. **(This is indicated by the Account Dimension's column: CardUsageBand)**
- Create 10% holdouts for each "cell"
- Integrate data and send emails monthly based on each of the "cells". **(Emails will be executed outside of AJO.)**

✓ Exercise

Add a Fork

1. Click on the **Plus Sign Icon** in the canvas
2. Select **Fork** under flow control (Label: Checking Campaign)
3. Add a **Build Audience node** to **both** paths
 1. **Top** Build Audience Node **Label: Account and Customer**
 2. **Bottom** Build Audience Node **Label: Suppression Audience**

Build Audience Queries

1. Click back on Build Audience Node and Label it: **Business Account No Checking**
 1. **Click** the **Folder Icon** under Targeting Dimension
 2. Select your **CUSTOMER_RECIPIENTS**
 3. Click the button **Edit Audience**
 4. Click **Add Select or save filter**
 5. Click **Select predefined filter**
 6. Select **BUSINESS_CARD_NO_CHECKING**, click confirm
 7. **Confirm** and exit to Canvas

Build audience 



Label

Business Accounts No Checking 

Audience

Targeting dimension *

CUSTOMER_RECIPIENTS  

 Edit audience

(ACCOUNTS_FILE Exist such as (AccountType equal to BUSINESS_CARD) AND (AccountStatus equal to OPEN)) AND (ACCOUNTS_FILE Do not exist such as (AccountType equal to BUSINESS_CHECKING) AND (AccountStatus equal to OPEN))

If the audience is empty

☐ Generate an outbound transition

1. Click back on **Suppression Audience** (Label It: **Previous Campaign Activity**)
 1. **Click** on the **Folder Icon** Under Targeting Dimension
 2. Select your CAMPAIGN_MEMBERSHIP_INITIALS Dimension
 3. **Click** the button **Edit Audience**
 4. Click **Add Condition**
 5. The criteria should be (**CampaignID equal to BUSINESS_CHECKING_OFFER**)
AND (SendDate greater than or equal to 6 months ago)

6. Click **Calculate**

7. **Confirm** and exit to Canvas

Build audience ?



Label

Previous Campaign Activity 

Audience

Targeting dimension *

PAST_CAMPAIGN_ACTIVITY... 

 Edit audience

(CampaignID equal to
BUSINESS_CHECKING_OFFER) AND (SendDate
greater than or equal to 6 months ago)

If the audience is empty

☐ Generate an outbound transition

Add Enrichment

- **On the Top Path**
 - Select a **Enrichment** node and Label: **Customer Accounts**
 - Select primary set **Business Account No Checking**
 - Click on **Add Enrichment data**
 - Click on **Targeting dimension**
 - Click on **ACCOUNTS_FILE**
 - Select **Last4AcctNum**
 - click **confirm**

- **Lines to retrieve must be 1**
- Click on Add Attribute
- Select **CardUsageBand**
- **Confirm**
- Click on Add Attribute
- Select AccountType
- **confirm**

ACCOUNTS_FILE (target/ACCOUNTS_FILE)

Label

ACCOUNTS_FILE

Alias

ACCOUNTS_FILE

Select how the data is collected

Collect data



Lines to retrieve (Columns to create)

1

Attributes

+ Add attribute

Attribute 1

Last4AcctNum (@Last...



Label

Last4AcctNum

Alias



Attribute 2

CardUsageBand (@Ca...



Label

CardUsageBand

Alias



Attribute 3

AccountType (@Acco...



Label

AccountType



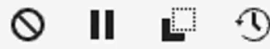
Account type

Alias

Add a Combine Node

- On the **Top Path**, click the **plus sign**
- **Add a Combine Node**
- Select **Exclusion**
- Make sure both Sets to join are checked (Previous Campaign Activity and Customer Accounts)
- Primary Set: **Customer Accounts**
- Click **Add a rule**
- Select **Join**
- Excluded Set (**Previous Campaign Activity**)
- Click **Source** and select **CustomerID**
- Click **Destination** and select **CustomerID**

Combine ?



Label

Exclusion



Combine type

Exclusion

Sets to join ?

☒ Previous Campaign Activity (Result)

☒ Customer Accounts (Result)

Primary set

Customer Accounts



Exclusion rules ?

+ Add a rule

Joins



Excluded set

Previous Campaign Activity



+ Add join

Source

CustomerID (@Custo...



Destination

CustomerID (@Custo...



☐ Generate complement ?

Add a Split

- Click on the plus sign, next to your Exclusion node.
- Select the **Split Node and Label: Control/Target Selection**
- **Add** a total of **3 Segments** (Labels: USAGE_HI_CONTROL, USAGE_MED_CONTROL, USAGE_LO_CONTROL)
- USAGE_HI_CONTROL:
 - Click **Create Filter**
 - Click **Add Condition**
 - Select **cardUsageBand equal to HIGH**
 - Enable Limit
 - Limit Size: 10 Percent
- Repeat the steps above but for USAGE_MED_CONTROL and USAGE_LO_CONTROL but **cardUsageBand** equals **MEDIUM** and **LOW** respectively.
- Once done, select: **Generate complement and Label Target Audience**
- Click Start/Resume

Split ?



Label

Control/Target Selection

i

Segment ?

+

Add segment

> USAGE_HIGH_Control   

> USAGE_MEDIUM_C...   

> USAGE_LOW_Control   

☒ **Generate complement** ?

You cannot deactivate a transition linked to subsequent activities. To deactivate the "Generate complement", please delete the subsequent activity.

Transition label

Target Audience

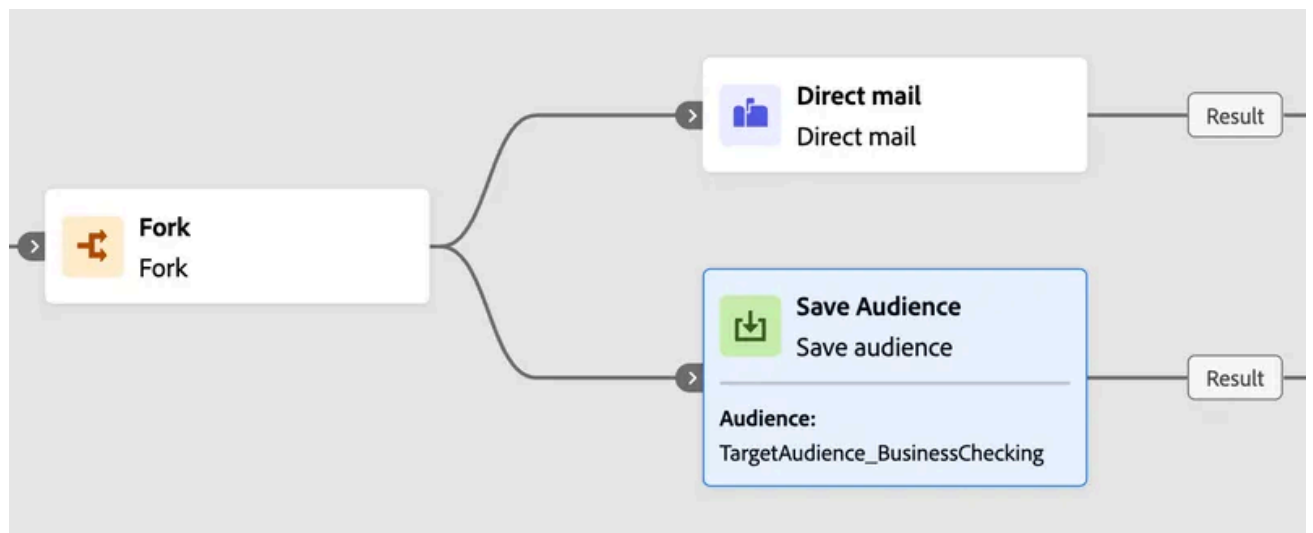
☐ **Enable overlapping of output populations** ?

☐ **Generate all subsets in the same table** ?

You cannot deactivate a transition linked to subsequent activities. To deactivate the "Generate all subsets in the same table", please delete the subsequent activity.

Add a Fork

Add a Fork node on the Target Audience path.



Add Direct Mail

- Click the plus **sign** on the first path
- Select **Direct Mail**
- Category: Transactional
- Click Edit Direct Mail

Direct mail ?



Create direct mail content

The direct mail content must be created before executing the campaign.

Label

Direct mail



Category ?

Transactional



View the content or settings of this action.



Edit direct mail



Send without confirmation

- Select the 'Direct Mail' preset under Actions
- Click 'Edit Content'

Properties
Actions
Content
Schedule

Actions

Direct mail

Direct mail channel configuration * ?

directMail-preset
▼

Select or create new channel configuration

Profile target dimension

CUSTOMER_RECIPIENTS

Edit content

Business rules

Rule set ?

▼
🗑️

- Provide a file name
- Add Data Fields :
 - CustomerName
 - EmailAddress
 - AccountType
 - CardUsageBand

* required

File Properties

Filename

BusinessCheckingTargeting

☒ Append timestamp to export filename

Notes

☐ Include notes as header
☐ Include notes as footer

Data Fields

+ Add

	Label	Data
≡	Customer Name	{{target.customer_file.CustomerName}}
≡	Email Address	{{target.customer_file.EmailAddress}}
≡	Account Type	{{target.enrichment.ACCOUNTS_FILE.AccountType}}
≡	Card Usage Band	{{target.enrichment.ACCOUNTS_FILE.CardUsageBand}}

Add Save Audience

- **Click** the plus **sign** on the second path

- Select **Save Audience**
- Audience Label: **CHECKING_CAMPAIGN - Initials**
- Select the Profile Mapping Field: **CUSTOMER_FILE - CustomerID**
- Add an Audience Mapping:
 - CustomerID
 - AccountType
 - CardUsageBand
 - Last4accNum
 - CustomerName

Save audience



Label

Save Audience



Audience label *

TargetAudience_BusinessChecking

Profile mapping field *

CUSTOMER_FILE - CustomerID



Audience mappings *

+ Add audience mapping

▼ Customer_file_CustomerID



Source audience field *

CustomerID (target/@CustomerID)



Target audience field *

Customer_file_CustomerID

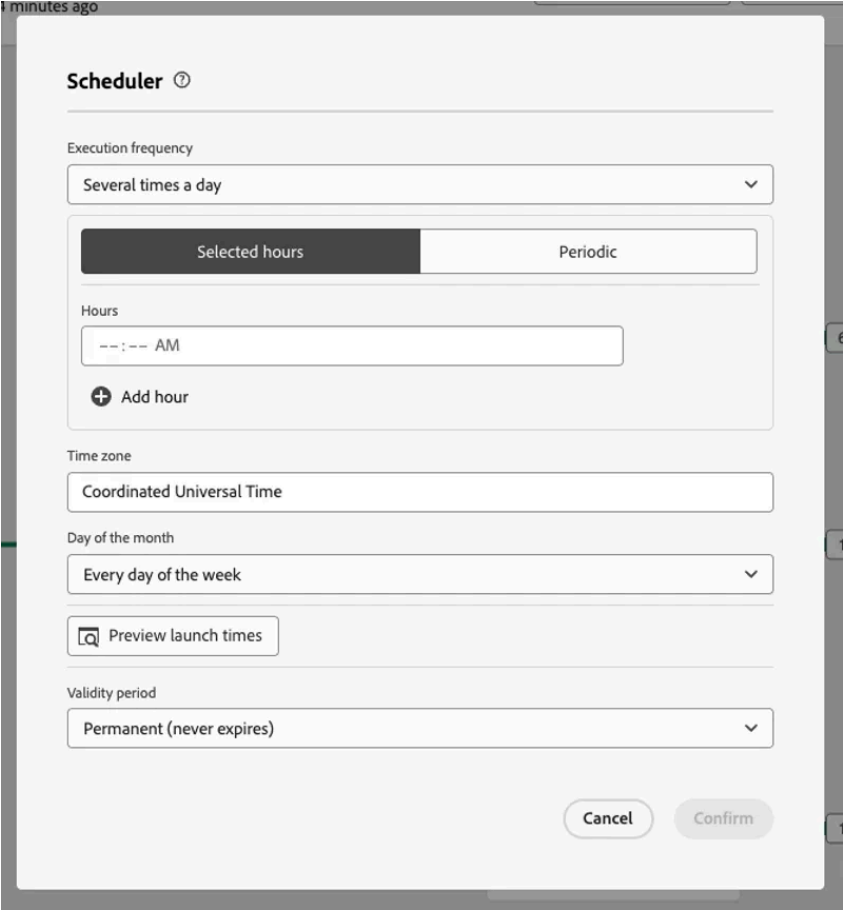
Add End Activity Nodes

- On All the other paths of our split, please click the sign plus next to them
- Add an End to each.

Congratulations, you completed the Campaign Workflow! Now, we'll add content!

1.4.2. Scheduling, Debugging, Testing

Scheduler



The screenshot shows a 'Scheduler' dialog box with the following fields and options:

- Scheduler** (title bar)
- Execution frequency**: A dropdown menu set to 'Several times a day'.
- Selected hours** and **Periodic** tabs. The 'Selected hours' tab is active.
- Hours**: A text input field containing '--:-- AM' and an '+ Add hour' button.
- Time zone**: A dropdown menu set to 'Coordinated Universal Time'.
- Day of the month**: A dropdown menu set to 'Every day of the week'.
- Preview launch times**: A button with a magnifying glass icon.
- Validity period**: A dropdown menu set to 'Permanent (never expires)'.
- Cancel** and **Confirm** buttons at the bottom right.

- Click on the scheduler icon at the top right
- Select Weekly
- Add a Start Time
- Add a Validity Period
- Click Confirm

Logs

Workflow logs and tasks

Purge history

Close

Logs

Tasks

Q

100 of many

(calculate)

Date	Log type	Activity name	Message
Today 12:40:29 PM	Info	saveDCGroup2	Campaign will not be executed in simulation mode
Today 12:40:29 PM	Info	saveDCGroup2	DACD-100000 Starting save audience activity
Today 12:40:26 PM	Info	dedup1	Executing query 'Result' (step 'Deduplication')
Today 12:40:23 PM	Info	ajoEmailCampaign1	Test mode. Waiting for user action to proceed with campaign preparation
Today 12:40:20 PM	Info	ajoEmailCampaign1	Fetching AJO Campaign '7544355f-68db-4db5-acda-da38c2371b8f' (do not validate=0, ignore missing=0)
Today 12:40:20 PM	Info	ajoEmailCampaign1	Using default merge policy '2b28c100-14c0-4023-b237-4ea75fcfae9'
Today 12:40:20 PM	Info	ajoEmailCampaign1	Running pre-export
Today 12:40:20 PM	Info	ajoEmailCampaign1	Starting campaign action (batchinstanceid='011b112f-a7e1-4fhd-9e80-b9b1d578e53.ajoEmailCampaign1' orchestratedCampaignVersionId='6ef9b4a7-e4c1-48fe...
Today 12:40:20 PM	Info	extract1	14 record(s) result from the extraction 'Complement' (step 'Split')
Today 12:40:20 PM	Info	extract1	Computing complementary set 'Complement' (step 'Split')
Today 12:40:20 PM	Info	extract1	94 record(s) result from the extraction 'Subset' (step 'Split')
Today 12:40:17 PM	Info	extract1	Executing extraction 'Subset' (step 'Split')
Today 12:40:11 PM	Info	query4	108 record(s) selected for the query 'Result' (step 'Query')
Today 12:40:10 PM	Info	query4	Executing query 'Result' (step 'Query')

- Click On the Elipsis icon, and select Logs
- Review the logs and tasks of your workflow.