



AJO Foundations Bootcamp

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1. Overview

What You Can Expect to Learn!

Explore Adobe Journey Optimizer's architecture, journey orchestration, orchestrated campaigns, decisioning, and real-time customer profiles. Through lectures, labs, and use case-driven exercises, you'll gain hands-on experience building experiences, validating outcomes, and using inbound/outbound channels for personalized engagement. Created by Adobe's lead solution architects from the product engineering team, this session offers direct insight into implementation best practices.

Key Topics

- Adobe Journey Optimizer Architecture & Capabilities
- The data stores of Adobe Journey Optimizer
- Orchestrated Campaigns Technical Building Blocks
- Journey's Technical Building Blocks
- Edge Profile and Edge Decisioning

2. Postman Setup

2.1. Postman Installation

Objective

By the end of this lab, you will be able to install Postman, configure a basic workspace and environment so that you can make subsequent api calls needed by future labs.

Postman is required for various labs in this course. Even if you have already installed Postman, you will need to complete this lab to ensure that you have the Environment Files and API Collection installed and properly set up.

Install Postman

Navigate to the Postman website and either download the Postman app or utilize the Web Version → <https://www.postman.com/download/>

Download Postman

Download the app to quickly get started using the Postman API Platform. Or, if you prefer a browser experience, you can try the new web version of Postman.

The Postman app

The ever-improving Postman app (a new release every week) gives you a full-featured Postman experience.

Windows 64-bit

By downloading and using Postman, I agree to the [Privacy Policy](#) and [Terms](#).

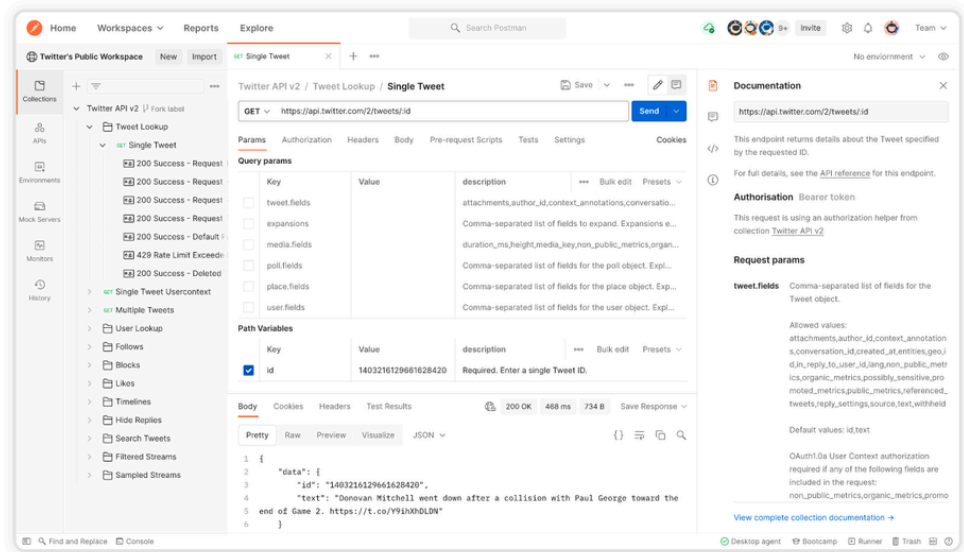
[Release Notes](#) · [Product Roadmap](#)

Not your OS? Download for Mac ([Intel Chip](#) / [Apple Chip](#)) or Linux ([x64](#))

Postman on the web

You can now access Postman through your web browser. Simply create a free Postman account, and you're in.

[Try the Web Version](#)



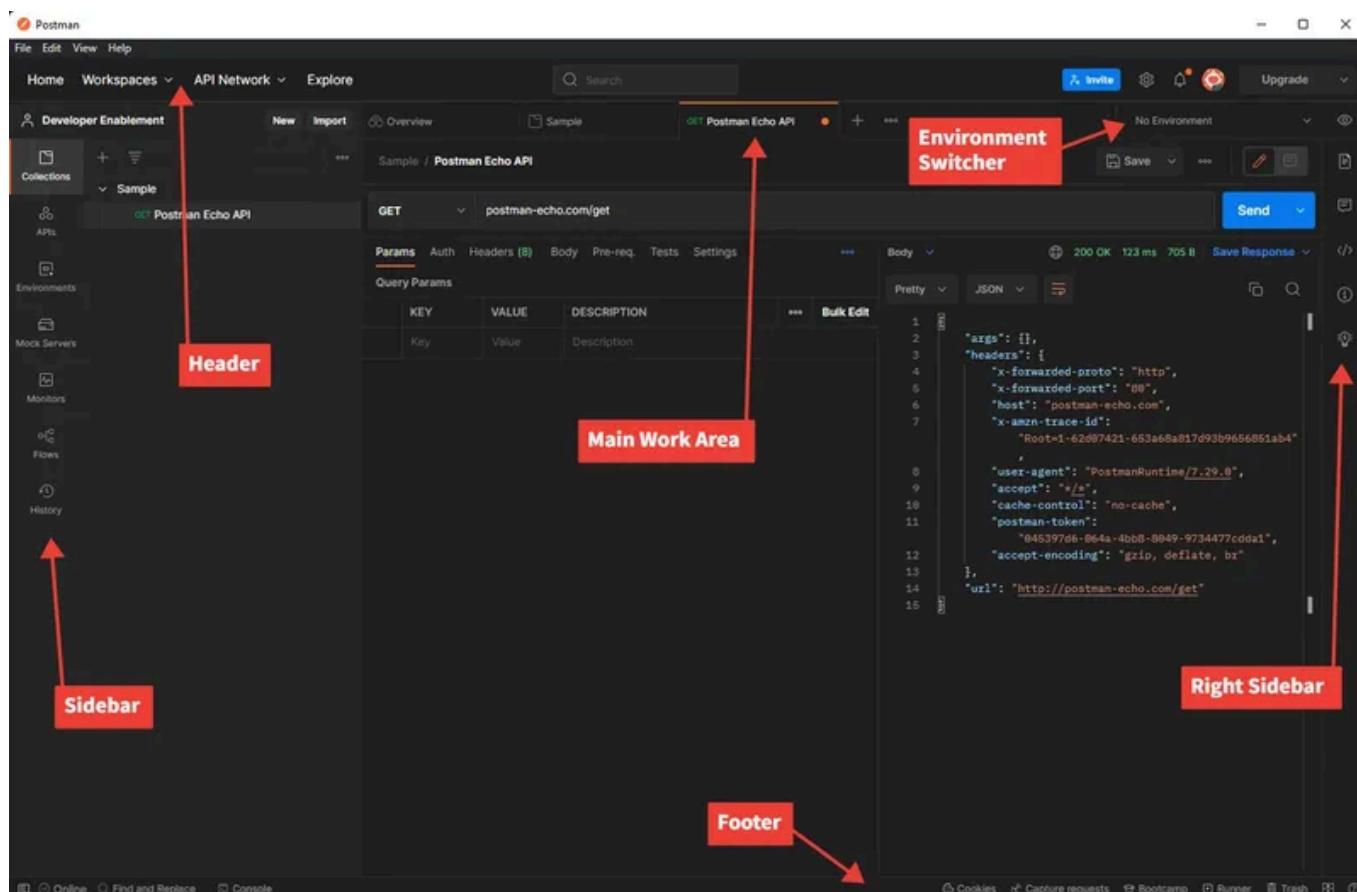
Create a Postman Workspace (Optional)

If you are *new to Postman* and this is your first installation, then you don't need to create a new workspace. On first launch, choose to continue without signing in, and you'll be using the lightweight client that doesn't require a workspace.

If you are *already familiar with Postman* and have it installed, then you likely were already signed in and have several workspaces. If this is the case, we'd recommend you create a new workspace for this *bootcamp*. Instructions can be found on the [Postman Website](#).

Postman Interface

Open Postman and quickly familiarize yourself with a few areas of the application. For the purposes of working with Experience Platform, we really only need to focus on a few key areas of the application.



Postman Interface

Sidebar

The sidebar is what allows you to navigate quickly across the different Postman elements. During the labs, you will only use the two items below:

Collections - groups of saved requests that can be imported from an external location or created by yourself.

Environments - a set of variables that you can reference in your Postman requests. In Experience Platform, you can think of Postman Environments as synonymous with Adobe Sandboxes within an IMS Org. We will use the Environment's function in Postman

Header

Workspaces - enable you to organize your work into various groupings (i.e. projects, teams, etc.)

Main work area

The main work area is where you will perform the majority of your work when working in Postman. All API requests are exposed in a specific tab within the main work area.

Right sidebar - provides additional access to tools based on the current tab selected.

Examples are documentation for the request, comments, and code snippets, to name a few features.

Environment selector - allows you to quickly switch between different environments to access pre-configured variables when working with APIs. When working with Experience Platform, you will leverage this when working with a specific AEP Sandbox within your assigned IMS org.

Footer

At the very bottom of the Postman application, you will find a set of functions that allow you to quickly see the logs for the calls you made, quick access to find and replace, and various other functions.

Recap

You should now have Postman installed and understand some basics of the UI

2.2. Import Environment File

Objective

On this page, you will import the Postman Environment File. This file contains a number of global variables that will be utilized within various API calls you will make during other labs throughout the bootcamp.

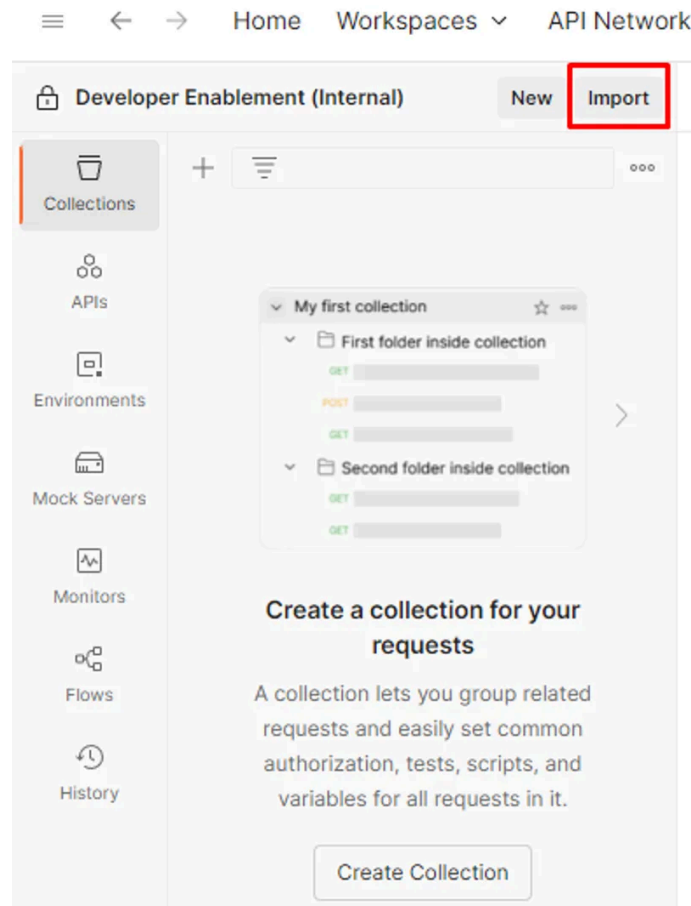
Import Environment File

1. Download the **AJO Bootcamp.postman_environment.json** file:

 [AJO Bootcamp.postman_environment.json](#)

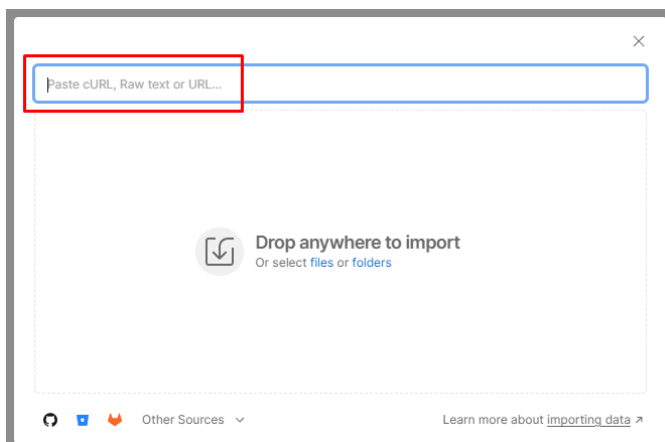


1. Launch Postman on your local machine.
2. If necessary, switch to the Workspace you are using for these labs (if you're using Workspace at all) and click on the **Import** button.

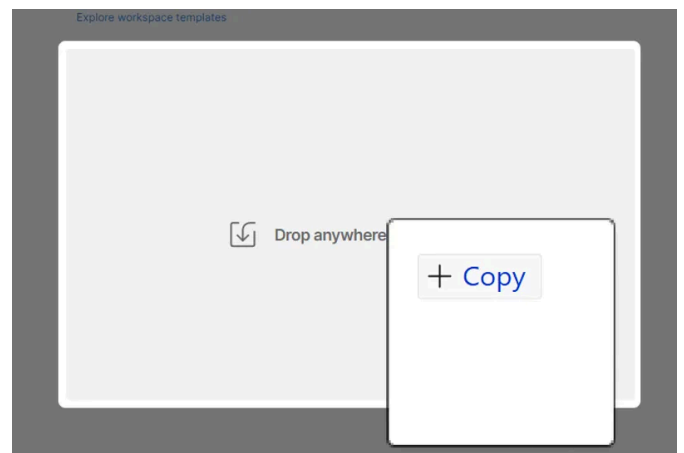


Postman begin import

3. Paste the local URL of the **AJO Bootcamp.postman_environment.json** file into the import modal text box or drop it into the import dialog box. This should trigger an automatic import

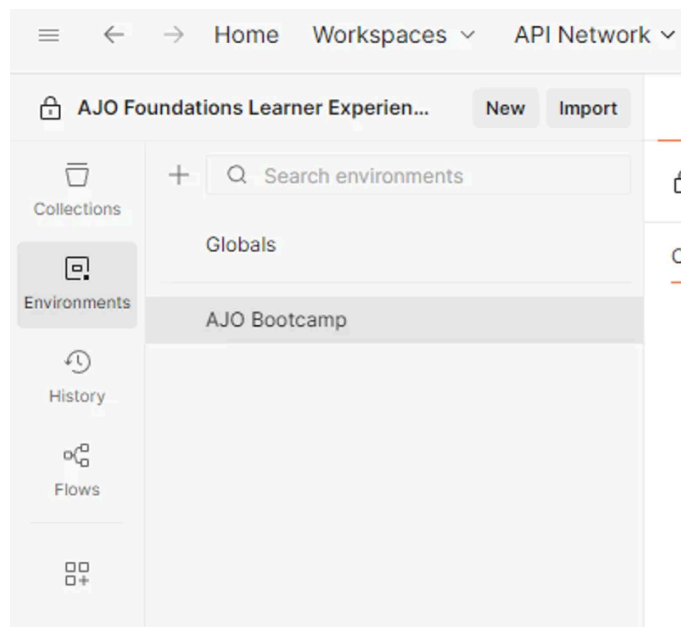


Postman import via URL



Postman import via drag and drop

4. Once imported, validate that the environment exists by clicking on the **Environments** tab in the left sidebar. You should see that the AJO Bootcamp environment is now available to you.



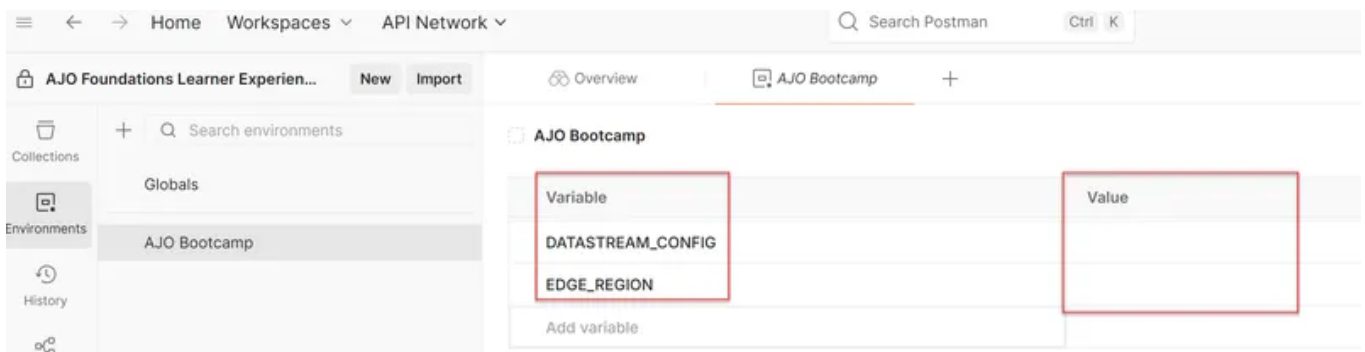
Validate environment import

Set Environment Variables

Postman was designed for testing and interacting with APIs. However, we're using it to simulate AEP Web SDK hits from a browser or for server-side real-time data collection calls. While these are still API calls in the strictest sense of the term, they aren't typical API calls that require things like authorization tokens in the header. The environment variables in these labs are mainly used for variables in URL paths (with one being used in a header).

You will need to reference the **sandbox-assignment.pdf** file that was sent to you earlier to get one of the values required for your environment file

1. If necessary, click on the **Environments** tab in the left sidebar of Postman
2. Click on the **AJO Bootcamp** environment file. You should see some values that you need to fill in



Verify postman variables in environments

3. Skip the `DATASTREAM_CONFIG` value for now. You will create a datastream configuration in a later lab.
4. Update the **EDGE_REGION** field with the region code that is closest to where we are physically located for this bootcamp, using the table below as a look-up.

Region	Region Code
Western US	or2
Eastern US	va6
Europe	irl1
Australia	aus3
Japan	jpn3
Asia	spg3

When done, your environment file should look similar to this:



The screenshot shows the Postman environment configuration for a workspace named 'AJO Bootcamp'. It displays a table with two columns: 'Variable' and 'Value'. The first row shows 'DATASTREAM_CONFIG' with an empty value field. The second row shows 'EDGE_REGION' with the value 'or2'. A third row with the text 'Add variable' is visible at the bottom of the table.

AJO Bootcamp	
Variable	Value
DATASTREAM_CONFIG	
EDGE_REGION	or2
Add variable	

Verify Postman region variable

6. You now need to save your environment variables; however, there is no save button in the Postman UI. You will need to use the Windows or Mac hot keys for saving (ctrl+s on Windows, for example). You will know your changes have been saved when you see a **Changes saved** message in the lower-right-hand side of the Postman UI:

 Changes saved



 Runner  Start Proxy  Cookies  Vault  Trash  ? 

Verify changes saved

Congratulations! You have completed your Postman Environment file

2.3. Import API Collection

Objective

In this step you will be importing the API collection which contains all the various requests you will need to make throughout the bootcamp. This API requests in this file are reliant on the environment file you just imported.

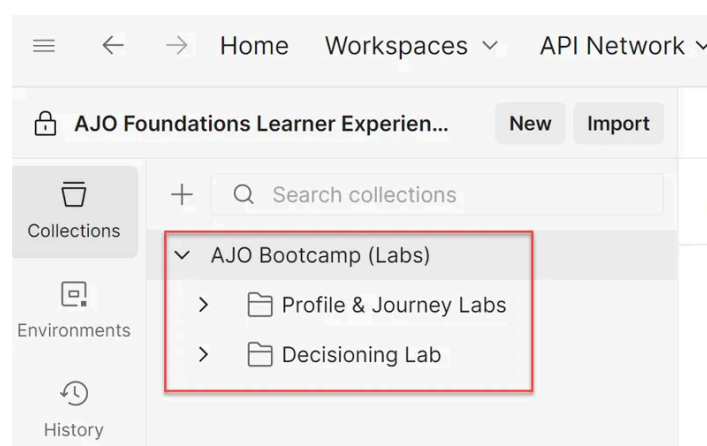
Import Request Collection

1. Download the **AJO Bootcamp (Labs).postman_collection.json** file:

 [AJO Bootcamp \(Labs\).postman_collectio...](#)



2. Like before, click on the **Import** button.
3. Paste the local URL of the **AJO Bootcamp (Labs).postman_collection.json** file into the import modal text box or drop it into the import dialog box. This should trigger an automatic import.
4. After the import process is complete, click on **Collections** in the left navbar, expand the **AJO Bootcamp (Labs)** folder, and you should see the newly imported collection



verify postman collection import

Congratulations! You have successfully imported the bootcamp's Postman Collection

Validate Environment Variables

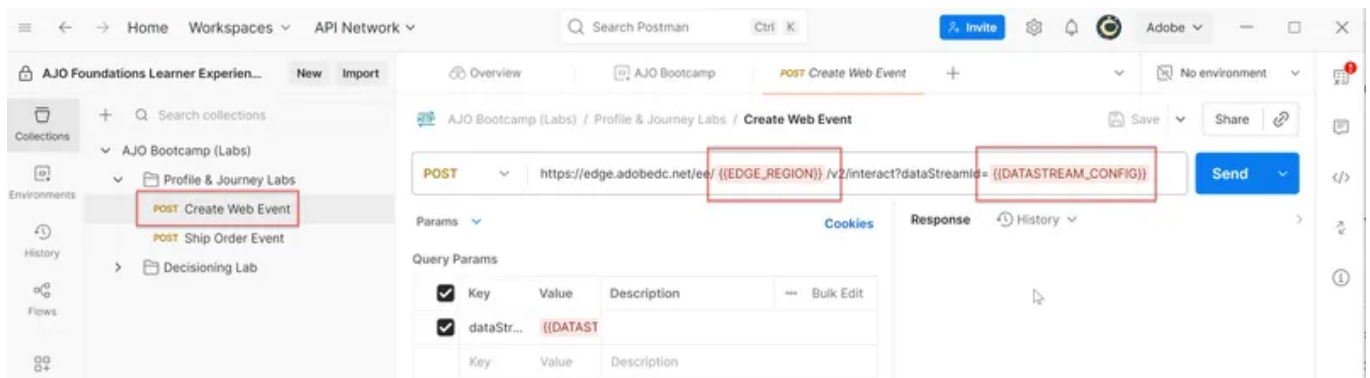
The collection you imported contains all the necessary API calls you will need for labs throughout the bootcamp. Each lab is organized into a specific folder with its own set of requests.

Details about each folder can be found below:

- **Profile & Journey Labs** - Contains a set of requests for sending in a Web Event and an event that simulates and shipping confirmation event.
- **Decisioning Labs** - Contains requests for 3 visitors that mimic the top and bottom page calls that would typically be found on a AEP Web SDK- tagged site.

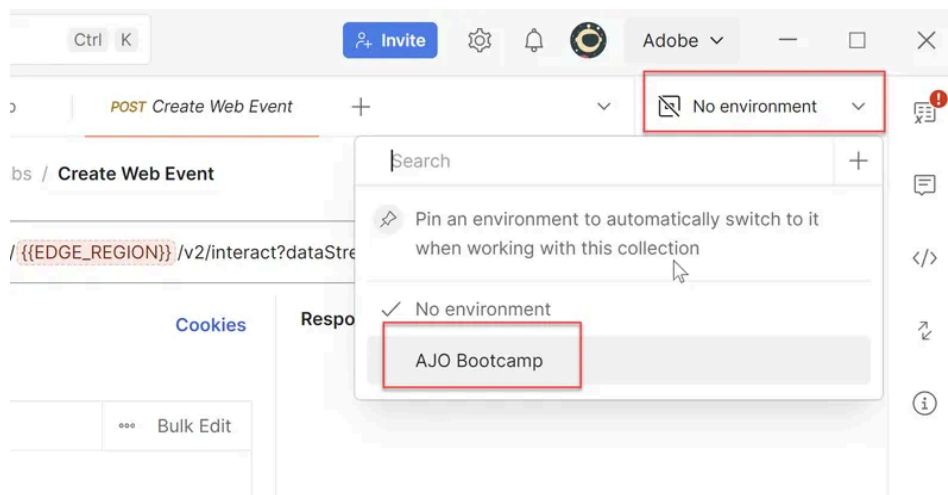
To ensure that the environment and collection are functioning correctly together, please follow these steps.

1. If necessary, click on **Collections** in the left rail and then expand the **Profiles & Journey Labs** folder.
2. Click on the **Create Web Event** request, and you should see that environment variables are **red**



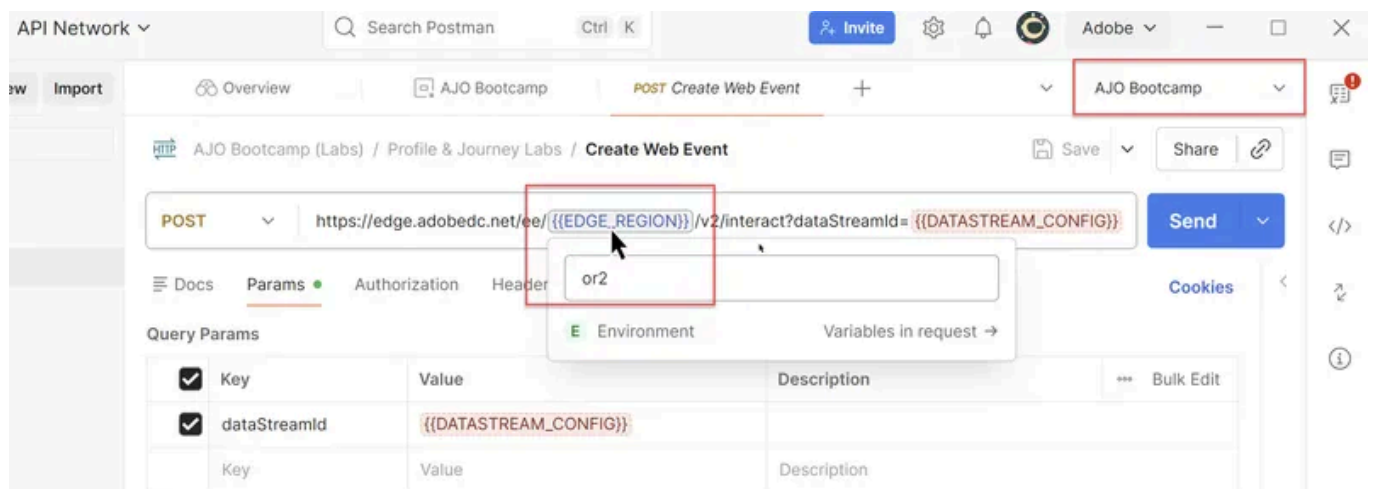
Verify postman environment variables are red

3. Click on the **Environment Dropdown** in the upper-right corner and choose the **AJO Bootcamp** environment.



Select correct Postman environment

- With the proper environment selected, you should see that the EDGE_REGION variable now turns a lighter blue color. This indicates that the variable now has a value for the selected environment. The DATASTREAM_CONFIG variable will stay red because you haven't created the datastream yet, so you don't have a value for that environment variable yet. Hovering over the EDGE_REGION will show you what the value of the environment value is.



Verify Postman environment works with collection

Recap

You should now have the Environment and Collection files imported and know how to use them.

3. Data Stores

3.1. Profile in Action

Pre-Requisites

The below labs must have been completed before starting this lab

- [Postman Installation](#)

If you have not completed these labs please do so now before continuing.

Learning Objectives

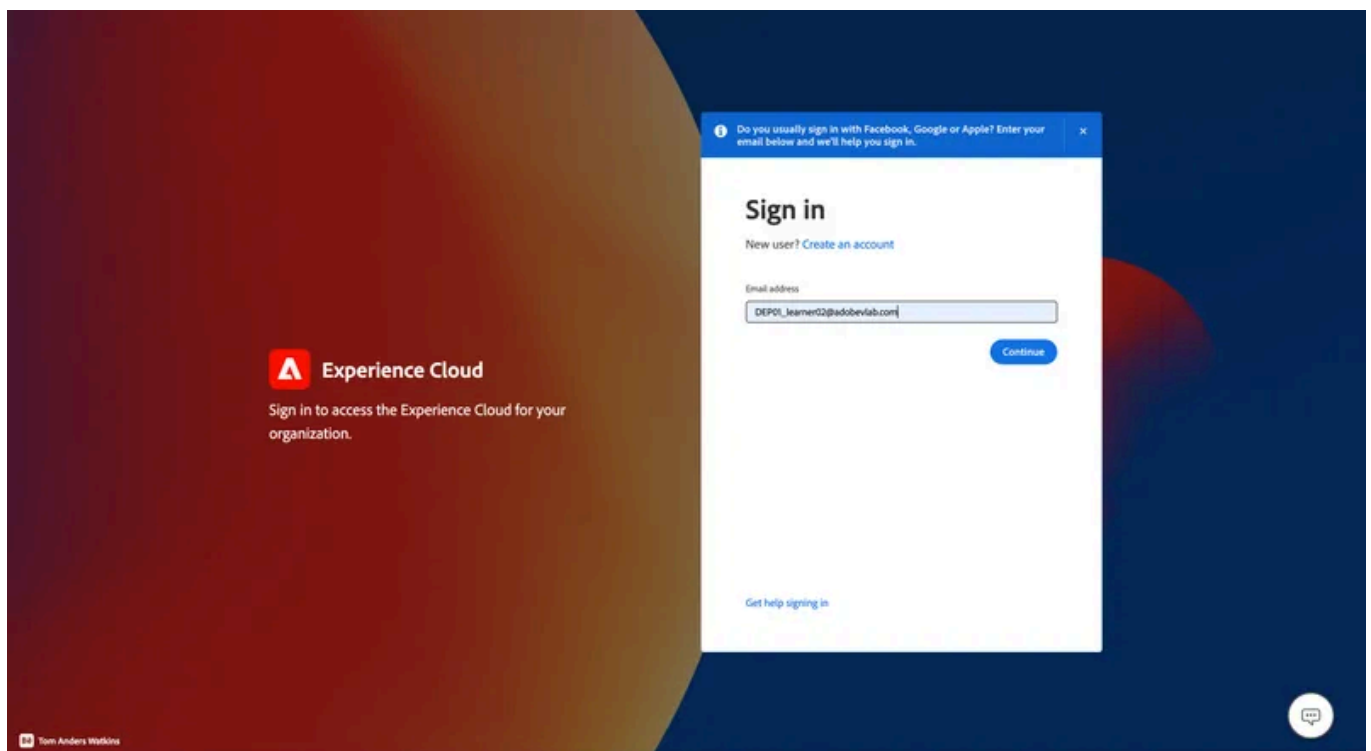
In this exercise, we will simulate a Web Page visit from an Edge source to Adobe Experience Platform. What should you walk away with after taking this Lab?

- Create and configure a datastream in Adobe Experience Platform
- Send a test web event to the Edge Network using Postman
- Validate profile creation and segment qualification in Real-Time Profile
- Confirm the profile exists on Edge but not yet in the Profile Snapshot dataset
- Verify the event was stored in the Data Lake

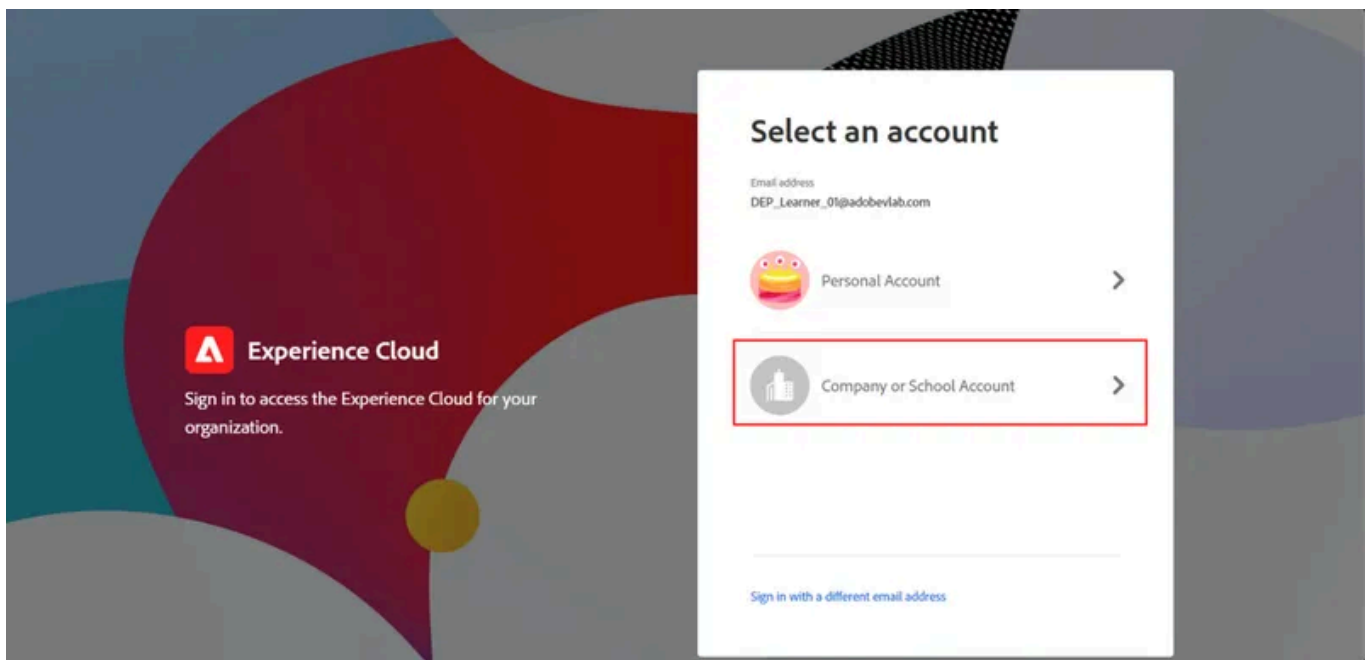
3.1.1. Login & Browse

Login via UI

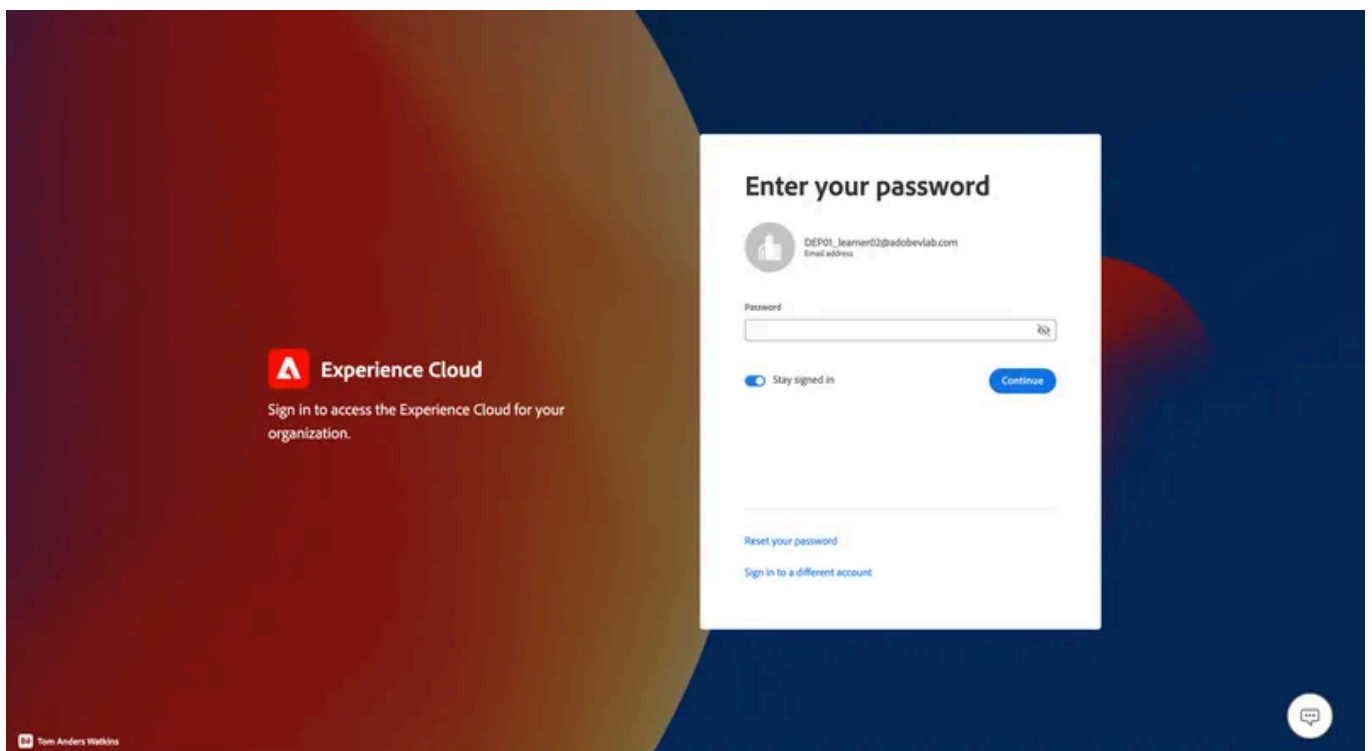
1. Navigate to <https://experience.adobe.com> in your browser.
2. Login using the credentials found in the **Sandbox Assignments PDF** that was emailed to you.
 - **Use the Learner Account** email and password
3. On the **Select an account** screen choose the **Company or School Account**.



Adobe Login page



Adobe Login with prompt for profile selection

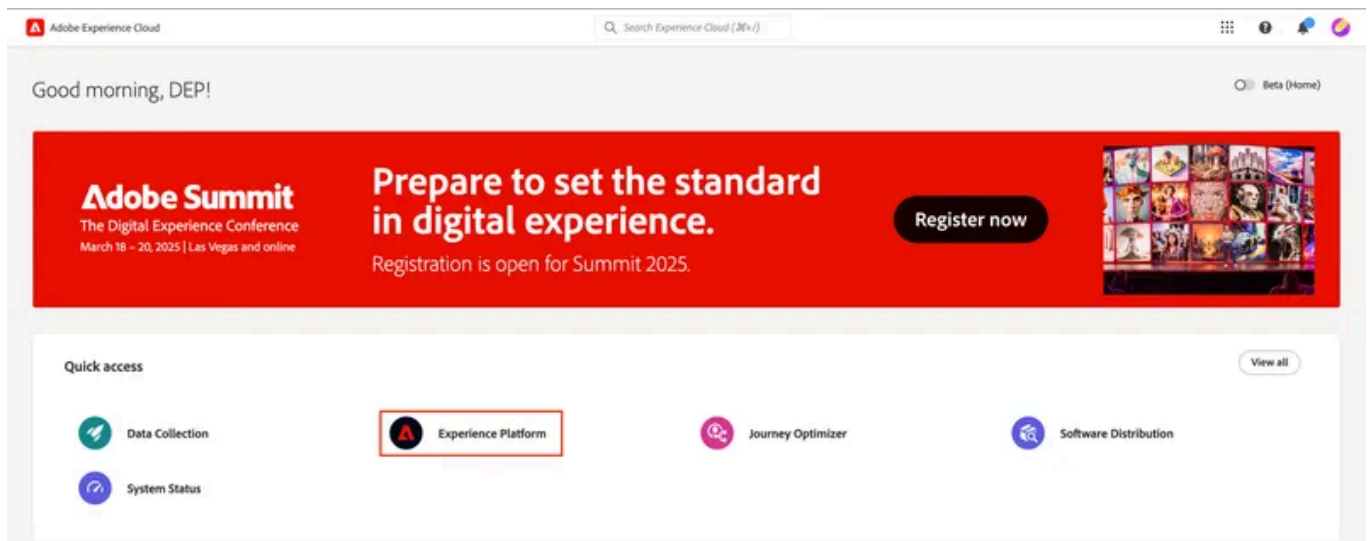


Adobe Password page

Launch Experience Platform

Click on the Experience Platform icon from the quick access panel to access your bootcamp sandbox

You may not see this screen and be launched directly into the Experience Platform. If so skip this step.



Quick access for the Experience Platform

3.1.2. Create Datastream

Learning Objective

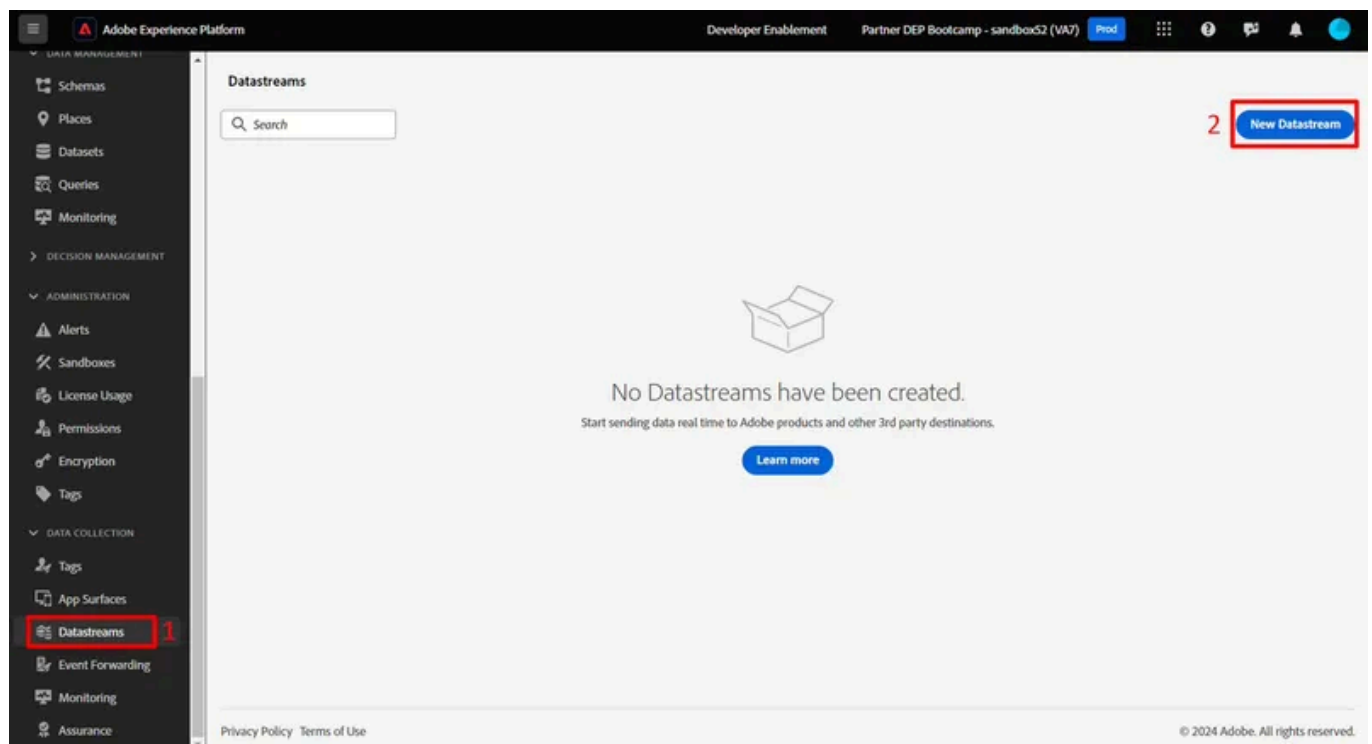
Create and configure a datastream with the required services to enable Edge event processing.

A Datastream defines which services that will utilize it.

- When sending data to the Edge you specify which Datastream to use
- Data sent to these Datastreams can then take action according to the service configured
 - Adobe Experience Platform

Create a New Datastream

1. In the left rail under **Data Collection** click on **Datastreams**
2. Then click on **New Datastream** to create one



Configure Datastream

Configure the datastream with following information:

1. Name → **Datastream SB + <sandbox name>** (i.e Datastream SB01)
2. Mapping Schema → **dep: Web**
3. Toggle **on** all the options under **Geolocation and Network Lookup** if you want to capture this info.
4. Click on the **Save** button when done

Do not click on Save and Add Mapping. If you accidentally do, just cancel out

Datastreams > **New Datastream**

Configure | Select data | Mapping

Cancel | **Save** | Save and Add Mapping

1 Name (required)
Datastream SB02

Description
Enter description

2 Mapping Schema
dep: Web

3 GEOLOCATION AND NETWORK LOOKUP

Geo Lookup ⓘ

- ☒ Country
- ☒ Postal Code
- ☒ Latitude
- ☒ State/Province
- ☒ DMA
- ☒ Longitude
- ☒ City

Network Lookup ⓘ

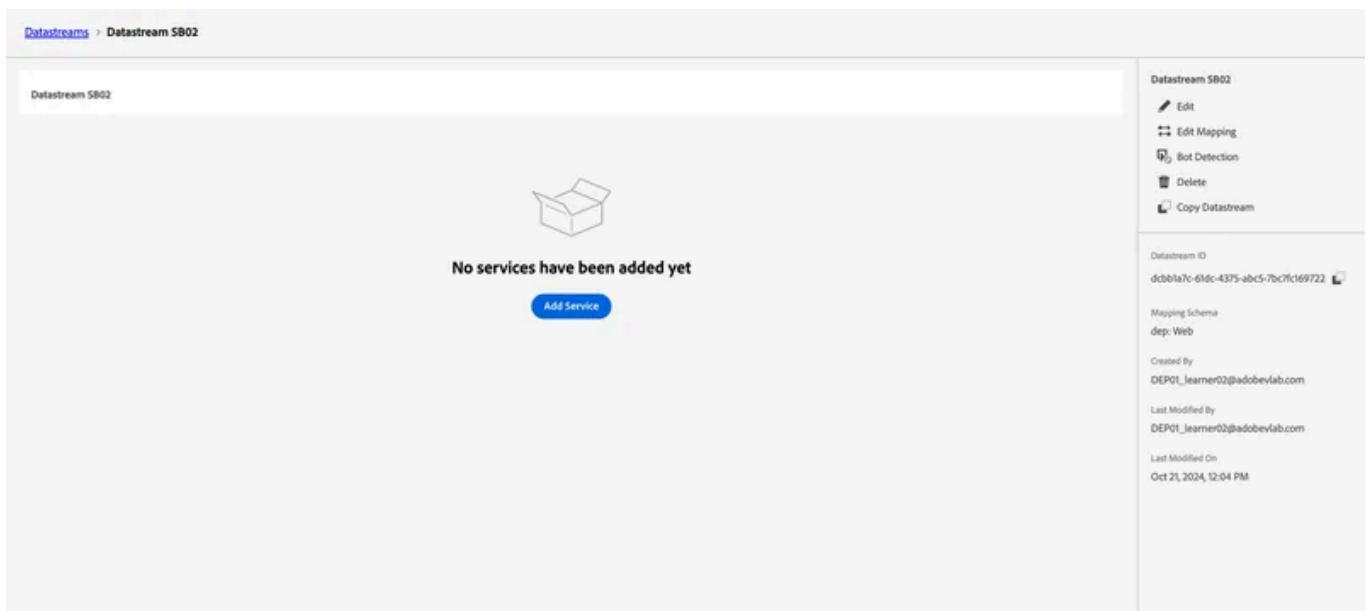
- ☒ Mobile Carrier
- ☐ Connection Type
- ☒ Domain
- ☒ ISP

> DEVICE LOOKUP ⓘ

> ADVANCED OPTIONS

Configure the datastream

After you save your datastream you will see the following screen:

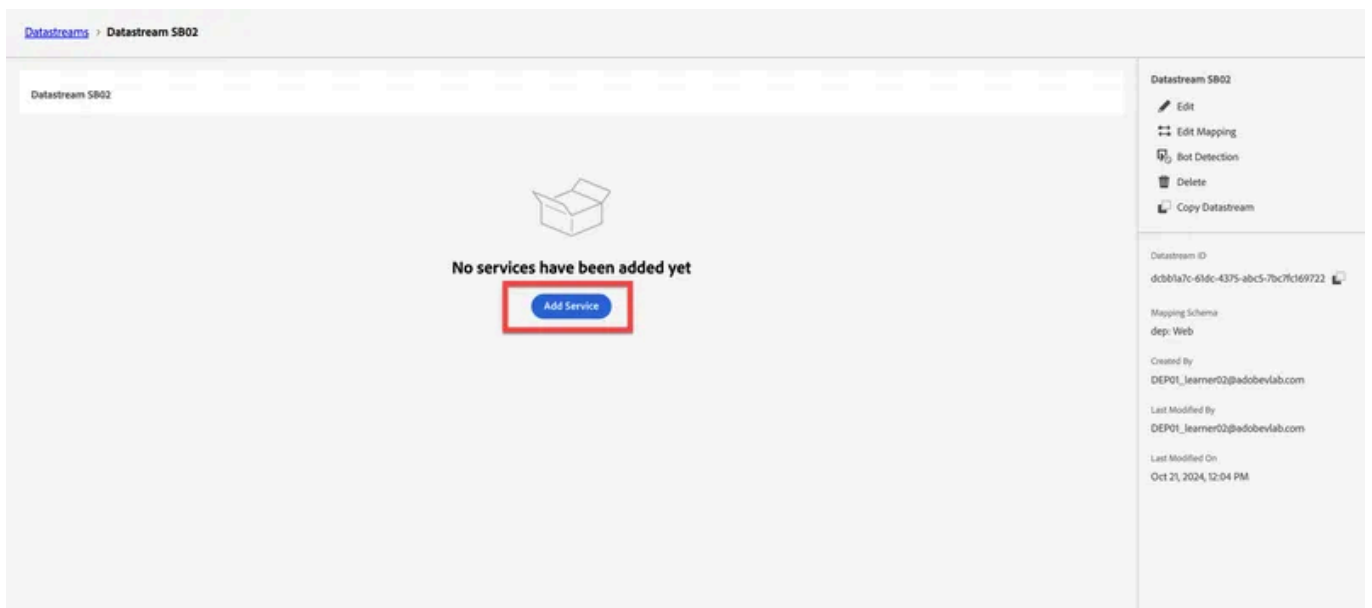


Datastream created final screen

Add Adobe Experience Platform Service

This will allow us to send data to the Hub and land in a dataset for data received by this Datastream.

1. Click the blue **Add Service** button found in the middle of the screen



1. Configure the following items:
 - **Service** → Adobe Experience Platform
 - **Event Dataset** → dep: Web
 - **Profile Dataset** → dep: Customer Account

- **Select Checkbox** → Offer Decisioning
- **Select Checkbox** → Adobe Journey Optimizer

2. When done click **Save**

> Add Service Cancel Save

Service (required)
Adobe Experience Platform

☒ Enabled

Event Dataset *
dep: Web Profile enabled: Yes Identity enabled: Yes ×

☐ Primary

Add Event Dataset

Profile Dataset
dep: Customer Account

☐ Primary

☒ Offer Decisioning

☐ Edge Segmentation

☐ Personalization Destinations

☒ Adobe Journey Optimizer

You should the service now added to your datastream

Datastreams > Datastream SB52

Datastream SB52

Service Name

Status

Adobe Experience Platform

Enabled

...

+ Add Service

Edit

Edit Mapping

Bot Detection

Delete

Copy Datastream

Datastream ID

082387ac-a23a-4b6a-b6b5-d552aadc3276

Event Schema

dep: Web

Created By

eknee@adobe.com

Last Modified By

eknee@adobe.com

Last Modified On

Jul 15, 2024, 2:56 PM

Adobe Experience Platform Service added in datastream

Copy and **save** the **Datastream ID** to your local computer (we will use it later in Postman)

[Datastreams](#) > Instructor Datastream

Instructor Datastream

Service Name

Status

Adobe Experience Platform

Enabled

...

+ Add Service

Edit

Edit Mapping

Bot Detection

Delete

Copy Datastream

Datastream ID

9f058bbd-3965-473b-8967-a6dea0ea0648

Mapping Schema

dep: Web

Created By

damiller@adobe.com

Last Modified By

damiller@adobe.com

Last Modified On

Sep 18, 2024, 5:30 AM

Dataflow

[View Dataflow](#)

Recap

You should have a functioning datastream with Adobe Experience Platform service configured

3.1.3. Send an Edge Web Event

Learning Objective

Send a simulated web event to the Adobe Edge Network using the API.

To simulate a web page being loaded and sent to the AEP Edge, we are going to send in a Postman call to the Datastream we created.

This will send in an event with no OAuth Token. Ensure you have Postman open on your machine to perform this lab.

Because we are not passing in an authenticated token, we will not get back any attributes.

Lab Expectations

1. Experience Event to hit the Edge
2. Datastream configuration
3. Datastream configuration to use AEP Service
 1. Edge Audience to run
 2. Send Event to the Hub
4. Postman Response to include Edge Audience (but no attributes)
5. Profile Store to receive event and add an Event Profile Fragment
6. Identity Store to add a relationship
7. Dataset to receive data and store in Data Lake

Update Postman Environment Variable

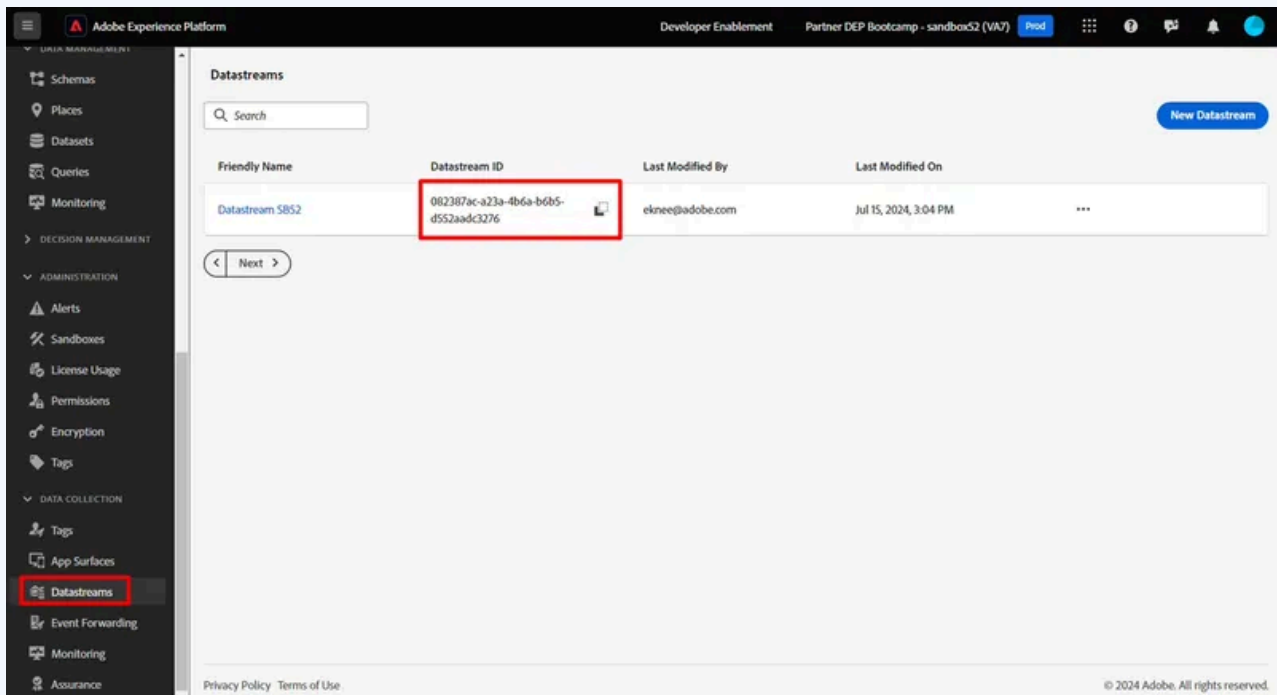
Before you can execute the API request you need to add the datastream ID to the Postman variable environment. Start by gathering the following values:

Gather the Datastream ID

1. You should already have the **Datastream ID**

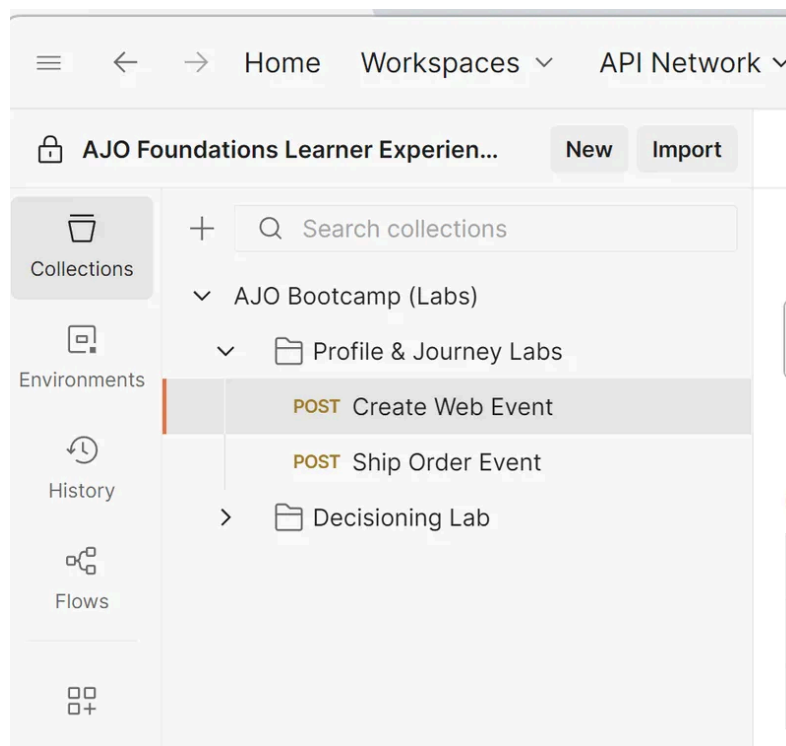
If you lost the Datastream ID

1. In the left rail click on **Datastreams** (under the Data Collection heading)
2. Select your Datastream and copy the **Datastream ID** value



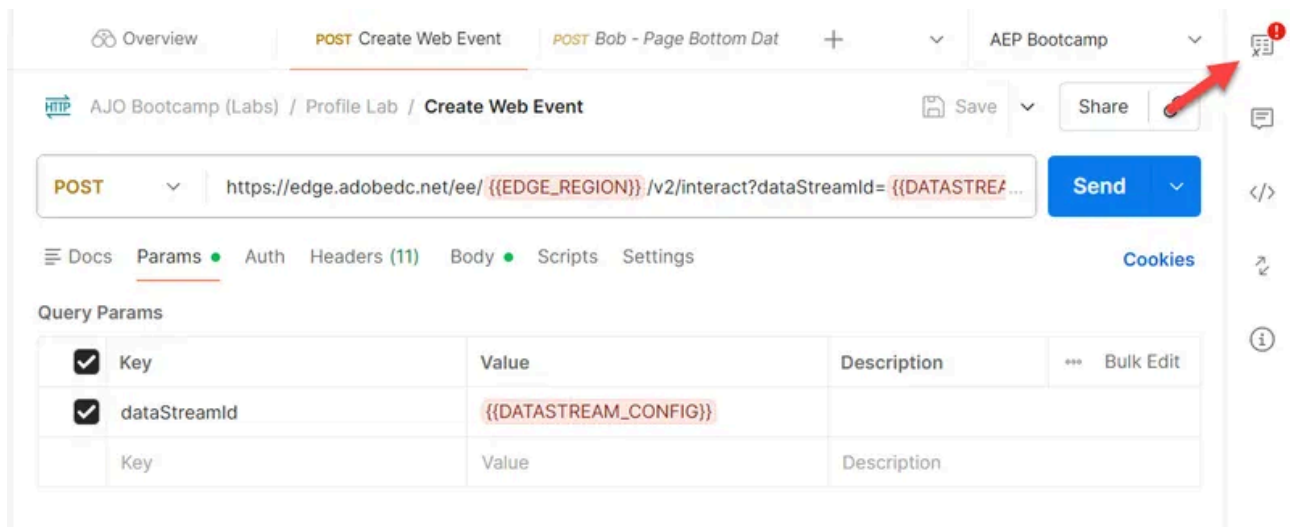
Navigate to the Call

1. **Postman Left Sidebar** → Collections
2. **Collection** → AJO Bootcamp (Labs)
3. **Folder** → Profile & Journey Labs
4. **API Request** → Create Web Event

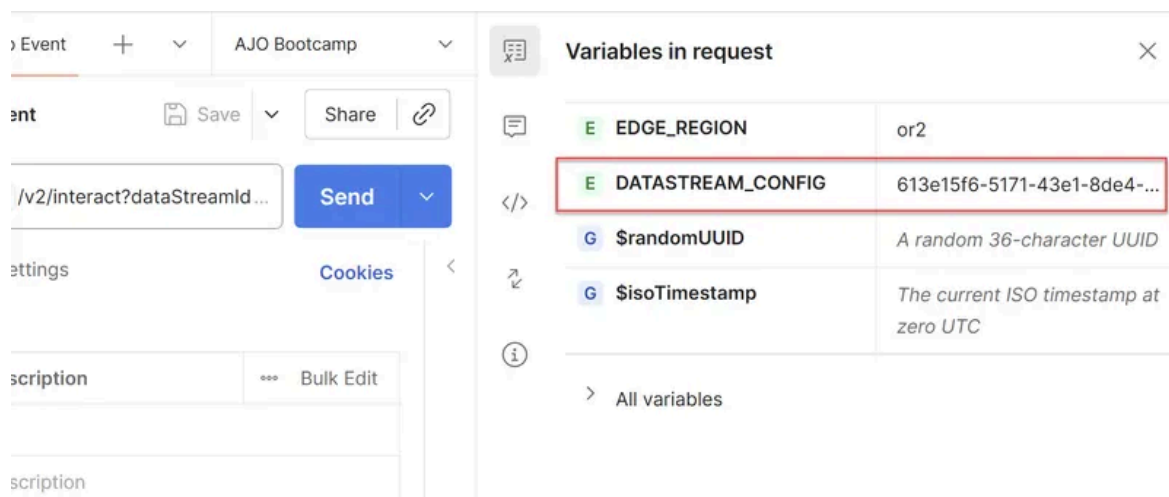


Update DATASTREAM_CONFIG variable.

1. Click on **Variables in Request** in the top right

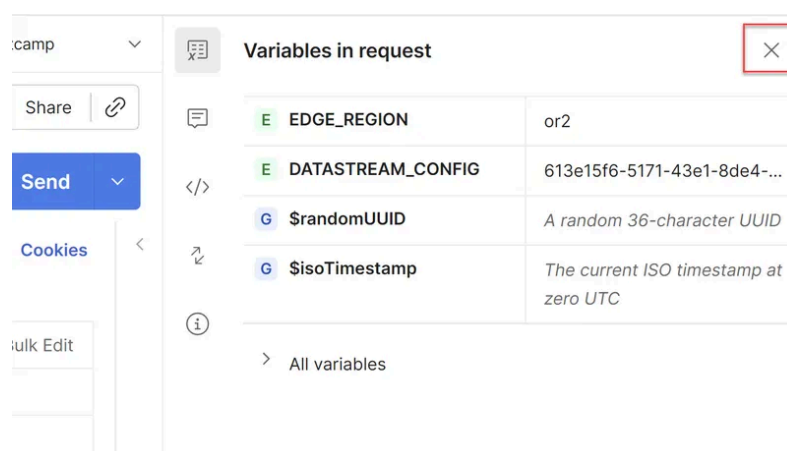


2. Update the **DATASTREAM_CONFIG** Value with the **datastream ID** from the first step on the page.

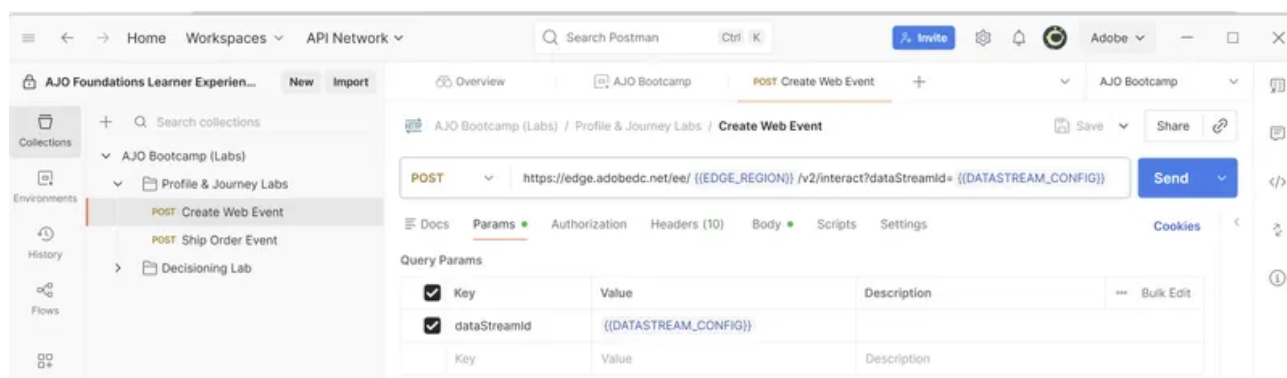


3. **Save** your update (ctrl+s or command+s)

4. Click the 'X' in the upper right corner of the environment sidebar to close the sidebar



5. The **Create Web Event** request should now be ready to send since all of the variables are now blue and have a value in the environment.



Execute the API

Execute your request by clicking the **Send** button.

Response will look something like this:

```
1 {
2   "requestId": "7ded94f7-754e-4b36-995b-91e0d80dbfe0-304b4d3ef46d40b8",
3   "handle": [
4     {
5       "payload": [],
6       "type": "activation:pull",
7       "eventIndex": 0
8     },
9     {
10      "payload": [
11        {
12          "scope": "Target",
13          "hint": "35",
14          "ttlSeconds": 1800
15        },
16        {
17          "scope": "AAM",
18          "hint": "9",
19          "ttlSeconds": 1800
20        },
21        {
22          "scope": "EdgeNetwork",
23          "hint": "or2",
24          "ttlSeconds": 1800
25        }
26      ],
27      "type": "locationHint:result"
28    },
29    {
30      "payload": [
31        {
32          "key": "kndctr_8D161E2767A982F80A495CD6_AdobeOrg_identity",
33          "value": "CiY4MzI4NDYyNDM9MTc1NjU4NzcyODI4MTA5NjQ2MjU8MTg8OTczMlIQCPmIyVXgMhg8KgNPUjIwA_AB-aLK9eAy",
34          "maxAge": 34128000
35        },
36        {
37          "key": "kndctr_8D161E2767A982F80A495CD6_AdobeOrg_cluster",
38          "value": "or2",
39          "maxAge": 1800
40        }
41      ]
42    }
43  ]
44 }
```

What you should see coming back in the response are these core things:

- A 200 OK response means the data was successfully sent and accepted by the Edge Network

Recap

The event has been successfully sent to and accepted by the Edge Network

3.1.4. Validate Profile on Hub

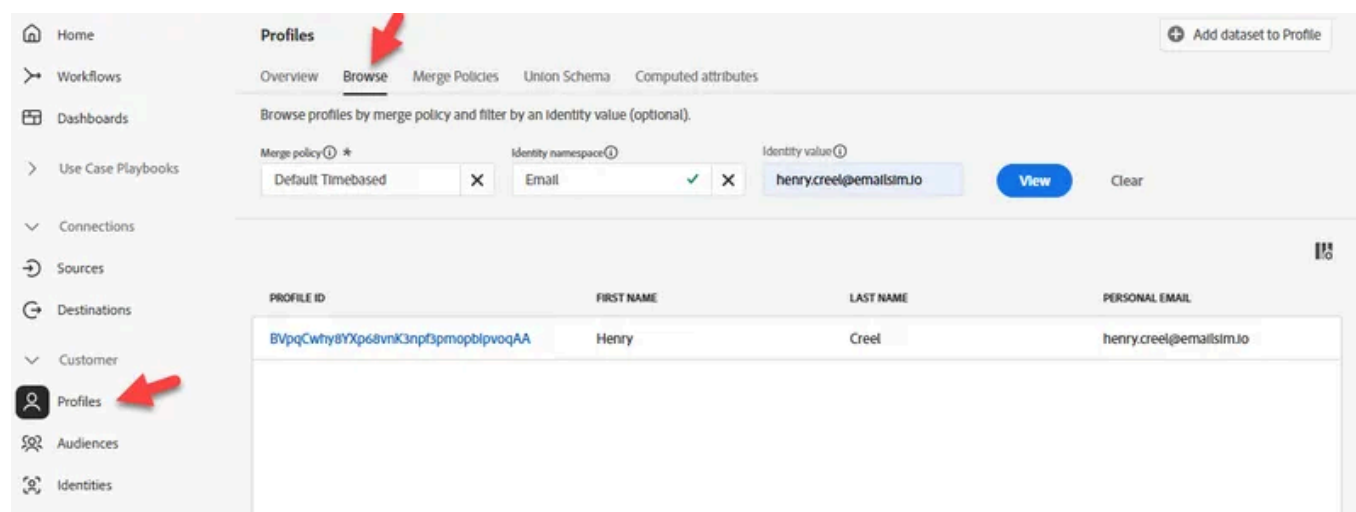
Learning Objective

Verify that the event resulted in a profile update and segment qualification in Real-Time Profile on the Hub.

Lookup the Profile on Hub

In Adobe Experience Platform lookup the profile you just sent in from the event you just sent into the Edge Network.

1. Navigate to **Customer** → **Profiles** → **Browse** to perform the lookup using the following information:
 - **Merge policy** → Default Timebased
 - **Identity Namespace** → Email
 - **Identity Value** → henry.creel@emailsim.io
2. Click **View** to lookup up the profile



The screenshot shows the Adobe Experience Platform Profiles interface. The left sidebar contains navigation links: Home, Workflows, Dashboards, Use Case Playbooks, Connections, Sources, Destinations, Customer, Profiles, Audiences, and Identities. The 'Profiles' link is highlighted with a red arrow. The main content area is titled 'Profiles' and has tabs for Overview, Browse, Merge Policies, Union Schema, and Computed attributes. The 'Browse' tab is active, showing a search interface with the following filters: Merge policy (Default Timebased), Identity namespace (Email), and Identity value (henry.creel@emailsim.io). A red arrow points to the 'Browse' tab. A 'View' button is visible next to the search filters. Below the search filters, a table displays the search results. The table has columns for PROFILE ID, FIRST NAME, LAST NAME, and PERSONAL EMAIL. The first row shows the profile ID BVpqCwhy8YXp68vniK3npt3pmopbipvoqAA, first name Henry, last name Creel, and personal email henry.creel@emailsim.io.

PROFILE ID	FIRST NAME	LAST NAME	PERSONAL EMAIL
BVpqCwhy8YXp68vniK3npt3pmopbipvoqAA	Henry	Creel	henry.creel@emailsim.io

Validate Profile on Hub

3. Click on the **Profile ID** to open the profile
4. Click on the **Attributes** tab first and the **Hub** radio button to see the **Hub Profile**

Profiles > Profile G9jzDAFBZYT94YwULw

Detail **Attributes** Accounts Opportunities Source records Events Audience membership

Profile using merge policy Default Timebased Last modified time: 06/27/2025, 9:43 PM

Q

Hub Edge View JSON

ATTRIBUTE	DISPLAY NAME	VALUE	↑ PATH
acqSource	Account Acquisition Source	InStore	_dep.account.acqSource
endDate	Account End Date	2022-01-20T13:15:32.000Z	_dep.account.endDate

Validate Events

5. Click on **Events** in the top nav and you can see the event you just sent in

Profiles > Profile BVpqCwhy8YXp68vnK3npf3pmopblpvoqAA

Detail Attributes Accounts Opportunities Source records **Events** Audience membership

Profile using merge policy Default Timebased Last modified time: 12/22/2025, 2:25 PM

web.webpagedetails.pageViews
12/22/2025, 2:25 PM View all

ATTRIBUTE	DISPLAY NAME	VALUE	↑ PATH
eventType	Event Type	web.webpagedetails.pageViews	eventType
timestamp	Timestamp	2025-12-22T22:25:05.854Z	timestamp
_id	Identifier	75a0e421-d042-4af9-8557-53327b41a854	_id
name	Name	iPhone 17	web.webPageDetails.name

Validate Segments

Via JSON

6. Click on the **Attributes** header and View **JSON**

Profiles > Profile BVpqCwhvznXqXnlXvpqHXv3XqfnKJg

Detail **Attributes** Accounts Opportunities Source records Events Audience membership

Profile using merge policy Default Timebased Last modified time: 09/12/2025, 8:02 AM

Q

Hub Edge View JSON

ATTRIBUTE	DISPLAY NAME	VALUE	↑ PATH
acqSource	Account Acquisition Source	web	_dep.account.acqSource

7. Find **segmentMembership**. It should look like this (your IDs will be different)

```
"segmentMembership": {  
  "ups": {  
    "ce0b8386-ef2a-4244-8ad0-1a72d6494181": {  
      "status": "realized",  
      "lastQualificationTime": "2025-12-15T23:11:49Z"  
    },  
    "8ce516fe-920a-4f9d-b92b-0403890a8491": {  
      "status": "realized",  
      "lastQualificationTime": "2025-12-12T15:01:01Z"  
    }  
  }  
}
```

How to read segmentMembership?

<https://experienceleague.adobe.com/en/docs/experience-platform/xdm/field-groups/profile/segmentation>

ups: This is the map key for different kinds of audiences supported by AEP. The ups key contains audiences created by the Rule Builder. Other audiences will be contained in other keys (e.g. AAM).

lastQualificationTime A timestamp of the last time this profile qualified for the segment

status

realized: The profile qualifies for the segment.

exited: The profile is exiting the segment as part of the current request.

Via UI

8. An easier way to validate the Profile has qualified for the Audiences is by looking at the **Audience Membership** tab (you should see at least these):

- dep: Any Event Streaming (within the hour)

- dep: Any Event Edge (within the hour)

Profiles > Profile BVRqzwVuzXWpopZXq_mnaG3v3KJg

DetailAttributesAccountsOpportunitiesSource recordsEventsAudience membership

AUDIENCE NAME	DESCRIPTION	MERGE POLICY
dep: Any Event Streaming (within the ...	dep: Any Event Streaming (within the ...	Default Timebased
dep: Any Event Edge (within the hour)	dep: Any Event Edge (within the hour)	Default Timebased

Why no Batch Audience?

You should not see **dep: Any Event Batch (within the day)** qualified for since we streamed in data and batch evaluation happens once a day.

Recap

A profile exists on the Hub and is qualified for the expected audience.

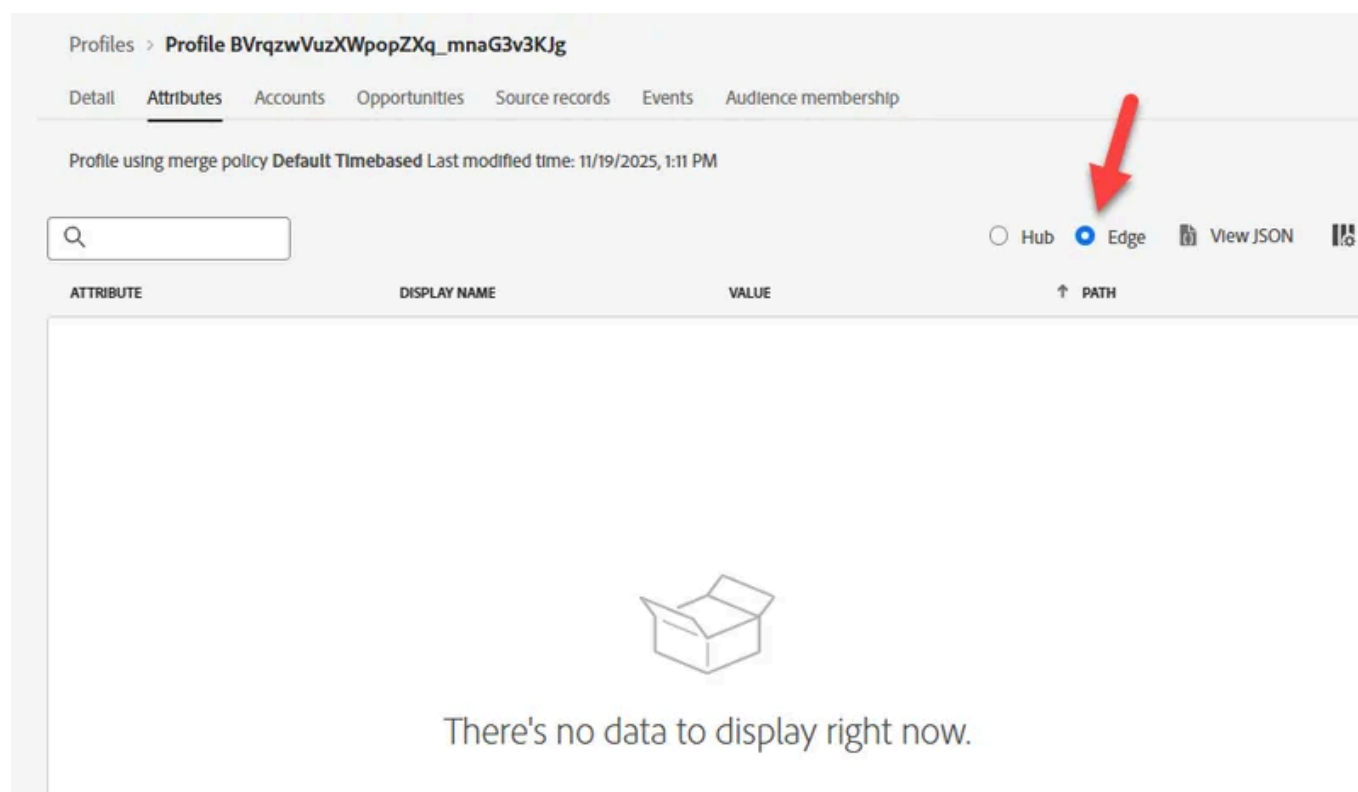
3.1.5. Validate Profile on Edge

Learning Objective

Confirm that the profile does not exist on the Edge network profile store.

Validate Profile on Edge

1. Click on the **Attributes** tab and the **Edge** radio button to see the Edge Profile



It is possible you may see a "stripped down" version of the profile that consists of only the identities depending on how much time has passed.

2. Click on the Audience Membership tab. It will be **blank**.

Profiles > Profile BVRqzwVuzXWpopZXq_mnaG3v3KJg

Detail Attributes Accounts Opportunities Source records Events Audience membership

Q

Hub Edge

AUDIENCE NA...	DESCRIPTION	MERGE POLICY	ORIGIN	AUDIENCE ID	LAST MODIFIED
 No audiences found					

Why no Edge Membership?

Shouldn't we have seen **dep: Any Event Edge (within the hour)** qualify?

Even though we have an audience that has an Edge evaluation, that audience does not exist on the Edge because we have no reason for it out there... yet.

If we were to use that audience (e.g. Decisioning or Destinations), then the audience rules will be pushed to the Edge and next time an event is streamed into the Edge, it will evaluate that audience.

Also, we didn't turn on Edge Segmentation Services.

Recap

The profile does not exist on the Edge (yet)

3.1.6. Validate Event on Data Lake

Learning Objective

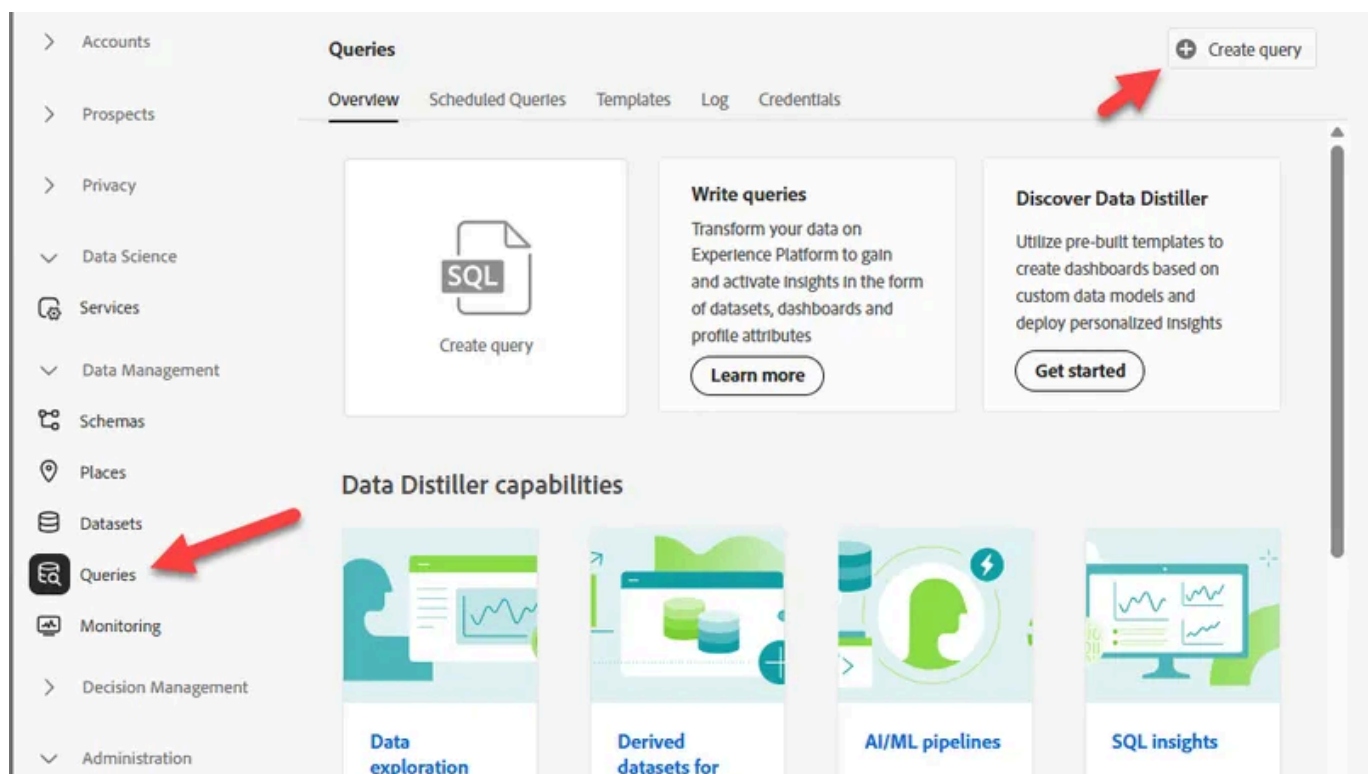
Verify that the web event was written to the Experience Platform Data Lake.

Validate Event

Eventually the data will appear in the Data Lake. **This could take up to 60 minutes.** We know the dataset is enabled for profile and thus the event will create a profile fragmentation.

You can find and query the Web dataset.

1. Go to **Queries** and **Create Query**



2. Copy this SQL and paste it into your query

```
SELECT identityMap['email'][0].id, * FROM dep_web
where identityMap['email'][0].id = 'henry.creel@emailsim.io'
```

3. Run Query

Remember: Eventually the data will appear in the Data Lake. **This could take up to 60 minutes.**

You do not need to wait for it to appear. Feel free to come back to this step and check later.

Console Query parameters Results							
IDENTITYMAP[EMAIL]	TIMESTAMP	IDENTITYMAP	WEB	_ID	ENVIRONMENT	PLACECONTEXT	EVENTTYPE
@adobe.com	11/19/2025, 9:03 PM	{ecid -> "(ambiguous,83284624341756587728281096462541849724f)", "ECID -> "(ambiguous,52287860258046788670160967091703556278f)", "email -> "(ambiguous, r@adobe.com,t)"}"	("(iPhone 17/NULL)")	f0e0c475-1ceb-44d1-bela-dd6209574fc3	("(PostmanRuntime/7.50.0)", "76.95.60.84")	("America/Los_Angeles,-480", "(92780,US-CA,Tustin", "(33.74,-117.82)", "US,803)", "2025-11-19 21:03:21.163")	web.webpagedetails.pageViews
@adobe.com	11/19/2025, 9:10 PM	{ECID -> "(ambiguous,55400432761784429290283262721159114084f)", "email -> "(ambiguous, @adobe.com,t)"}"	("(iPhone 17/NULL)")	e7f492ae-3621-4518-bcc0-789dfbca33d9	("(PostmanRuntime/7.50.0)", "76.95.60.84")	("America/Los_Angeles,-480", "(92780,US-CA,Tustin", "(33.74,-117.82)", "US,803)", "2025-11-19 21:10:30.466")	web.webpagedetails.pageViews

Recap

The event record appears in the appropriate dataset.

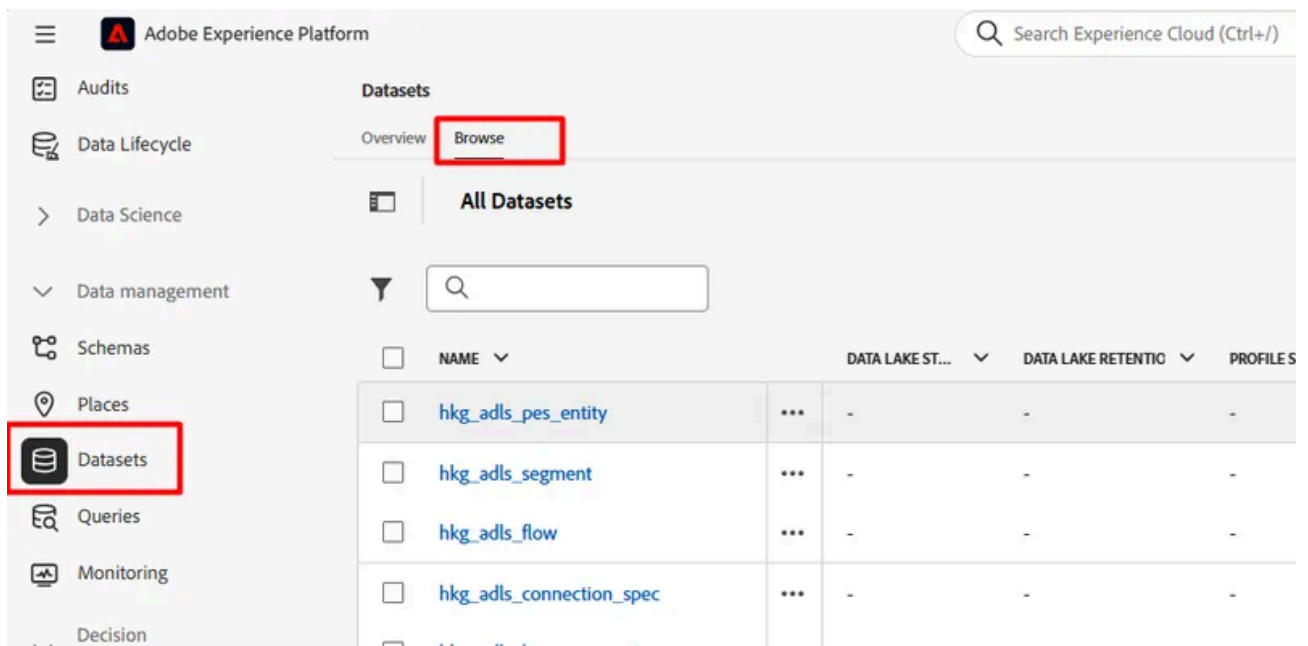
3.1.7. Validate Profile Snapshot

Learning Objective

Confirm that the profile does not yet appear in the Profile Snapshot dataset.

Use the Profile Snapshot dataset

1. In the left nav under the Data Management section click on **Datasets** and then click on the **Browse** tab found on the top rail



2. In the **search box** type `profile`, then **click on the row** with title "Profile-Snapshot...". and in the right rail **copy the table name** and paste it somewhere you can reference in the next step.

You may have to clear any filters if you don't see the "Profile-Snapshot..." dataset.

3. Navigate back to the Query editor and copy & paste the below SQL into the editor

```
select
  identityMap,
  segmentID,
  segmentMembershipUps[segmentID] ['lastQualificationTime'],
  segmentMembershipUps[segmentID] ['status'],
  current_timestamp
from
  (
    select
      identityMap,
      explode (map_keys (segmentMembership['ups'])) as segmentID,
      segmentMembership['ups'] as segmentMembershipUps
    from

  where
    map_keys (segmentMembership['ups']) is not null
  limit 100
  )
--where identityMap['email'][0].id = 'henry.creel@emailsim.io'
limit 50
```

4. Update the table name and email address as outlined below:

- **Table name:** on line 14 copy & paste the table name you have for the Profile Snapshot table between the **from** and **where**
- **Email address:** for now, on line 19 type in the same email address you used to send in your Web Event (we used henry.creel@emailsim.io, unless you changed it).
 - At the moment, we have commented this out (leave it that way). When the query runs, look for henry, you will not find it.

```

1 v select
2     identityMap,
3     segmentID,
4     segmentMembershipUps[segmentID] ['lastQualificationTime'],
5     segmentMembershipUps[segmentID] ['status'],
6     current_timestamp
7 from
8     (
9         select
10            identityMap,
11            explode (map_keys (segmentMembership['ups'])) as segmentID,
12            segmentMembership['ups'] as segmentMembershipUps
13        from
14            profile_snapshot_XXXX ←
15        where
16            map_keys (segmentMembership['ups']) is not null
17        limit 100
18    )
19 where identityMap['email'][0].id = 'some_email@emailsim.io' ←

```

1. **Run** the query by clicking on the arrow in the top left
2. The Results should be as below (but if you look for henry, you will not find him)

21 --where identityMap['email'][0].id = 'henry.creel@emailsim.io'
22 limit 20

Console

Query parameters

Results

Download

View results

	IDENTITYMAP	SEGMENTID	SEGMENTMEMBERSHIPUPS[SEGMENTID].LASTQUALIFICATIONTIME	SEGMENTMEMBERSHIPUPS[SEGMENTID].STATUS
1	[ecid -> " {(NULL,39073792316805738864595393190704534551,NULL)}"]	426b1453- 0cdc-46c9- 86d5- 539e7e3ca795	02/08/2024, 10:10 AM	exited

Why no results for Henry?

Reminder: The Profile Snapshot is a **reflection** or snapshot of what existed in Profile at a **specific point in time**. The job is run **daily** and is used for downstream purposes like AJO. Since we just streamed in this data, the Profile Snapshot does not yet have it. It will tomorrow.

Recap

Understand that snapshot datasets update on a scheduled batch process rather than immediately.

3.1.8. Summary

In this lab, you configured a datastream and sent a simulated web event to the Edge Network using Postman to observe how data flows through Adobe Experience Platform.

You validated that the event was processed by multiple platform services by confirming that a profile was created and qualified for a segment in Real-Time Profile. You also verified that the profile existed at the Edge, confirmed that the event was stored in the Data Lake, and observed that the profile had not yet appeared in the Profile Snapshot dataset due to its scheduled batch update process.

Through these steps, you demonstrated how events move through the Edge, Real-Time Profile, and Data Lake layers of Adobe Experience Platform.

IF YOU ARE READING THIS IT MEANS YOU ARE AT THE END OF THE LAB.

DO NOT PROCEED, DO NOT PASS GO, DO NOT COLLECT \$200

3.2. Relational Store in Action

Learning Objectives

- Browse schemas and view relationships
- Setup a Profile Target Dimension
- Build an Orchestrated Campaign using a variety of workflow activities
- Construct an audience using a Read Audience activity and use attributes from the Relational schema
- Test the campaign and understand the behavior when using AEP audiences in conjunction with relational schema

3.2.1. Browse Schemas

Objective

In the next set of steps you will navigate the UI to view the Schemas and their relationships. This is important to familiarize with the schemas and relationships available when you are building your campaign.

View Schemas

The Connection 5G relational data model has already been built for you. You can see the schemas for yourself by navigating to the **Schemas → Browse** page in the UI.

In the search box enter `dep-rel` to see all the schemas.

Schemas

OverviewBrowseClassesField groupsData typesRelationships

dep-rel

NAME	IDENTITIES	RELATIONSHIPS	ENABLED FOR PROFILE	CLASS	TYPE	LAST MODIFIED
dep-ret: Billing Detail	-	1	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Billing Statement	-	3	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Order	-	5	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Order Product	-	2	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Customer Address	-	1	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Customer Line	-	2	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Customer Account	-	6	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Store [Lookup]	-	1	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Product [Lookup]	-	3	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Product Type [Lookup]	-	1	Not enabled	-	Relational	11/25/2025, 3:35 PM
dep-ret: Plan [Lookup]	-	3	Not enabled	-	Relational	11/25/2025, 3:35 PM

Relational Schemas

Note the type of all the schemas is *Relational*

View Relationships Diagram

With relational XDM schemas you can easily view the entity relationship diagram (ERD) by seleting any schema and clicking on the View relationalships digram button.

Do the following:

1. Click on the **Relationships** tab and then click on the **View relationship diagram** button

SOURCE SCHEMA	DESTINATION SCHEMA	TYPE	SOURCE CLASS	DESTINATION CLASS	SOURCE FIELDS	DESTINATION FIELD
dep: Orders	dep: Plan [Lookup]	One-to-one	XDM ExperienceEvent	Plan	order_dep.plan.plan...	planID
dep: Customer Acco...	dep: Plan [Lookup]	One-to-one	XDM Individual Profile	Plan	_dep.plan.planID	planID
dep: Billing	dep: Plan [Lookup]	One-to-one	XDM ExperienceEvent	Plan	_dep.billing.planID	planID
dep: Customer Activ...	dep: Product [Lookup]	One-to-one	XDM Individual Profile	Product	_dep.activeProducts...	productID

View relationships diagram

2. Click **Select Schemas**
3. From the pop-up, select `dep-rel: Customer Account` and then click **Confirm**

NAME	CREATED	MODIFIED
☐ dep-rel: Billing Detail	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM
☐ dep-rel: Billing Statement	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM
☐ dep-rel: Order	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM
☐ dep-rel: Order Product	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM
☐ dep-rel: Customer Address	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM
☐ dep-rel: Customer Line	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM
☒ dep-rel: Customer Account	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM
☐ dep-rel: Store [Lookup]	11/14/2025, 9:29 AM	11/14/2025, 9:29 AM

Select dep-rel: Customer Account schema

4. On the ERD click the **3 dots** and select **Show related entities**

Recap

You have now seen how easy it is to navigate the Schema and Relationships UI. You can select a specific schema(s) and navigate to see the relationships to help understand and use the data in campaign orchestration.

You can read more [here](#) if you are interested.

3.2.2. Profile Target Dimension

Objective

In the next set of steps you will navigate the UI to view the Schema and setup the Identity. Next, you will setup the Profile Target Dimension, which is the entity type the campaign is targeting and reconciling with the AEP Profile for delivery.

Why This is Important

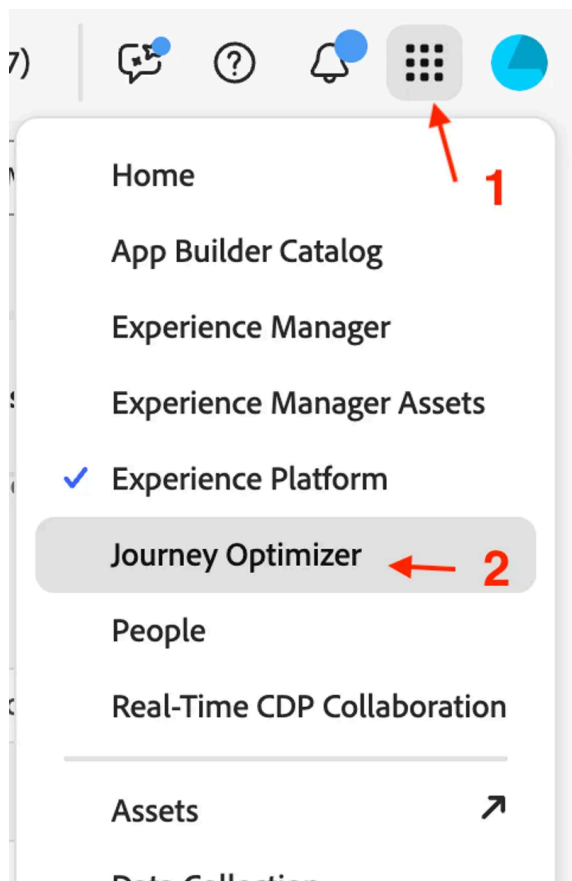
The Profile Target Dimension is used to tell Adobe Journey Optimizer how data between the Real-Time Customer Profile and Relational Store can be joined. The ingredients of this configuration are as follows:

- A relational schema
- A single field from the relational schema
- An identity namespace associated to that field

Without this configuration in place no reading or sharing of audiences can happen nor can any messages be sent out of Orchestrated Campaigns

Label the Identity

1. Click on the **Apps** icon and select **Journey Optimizer**



Navigate to Journey Optimizer

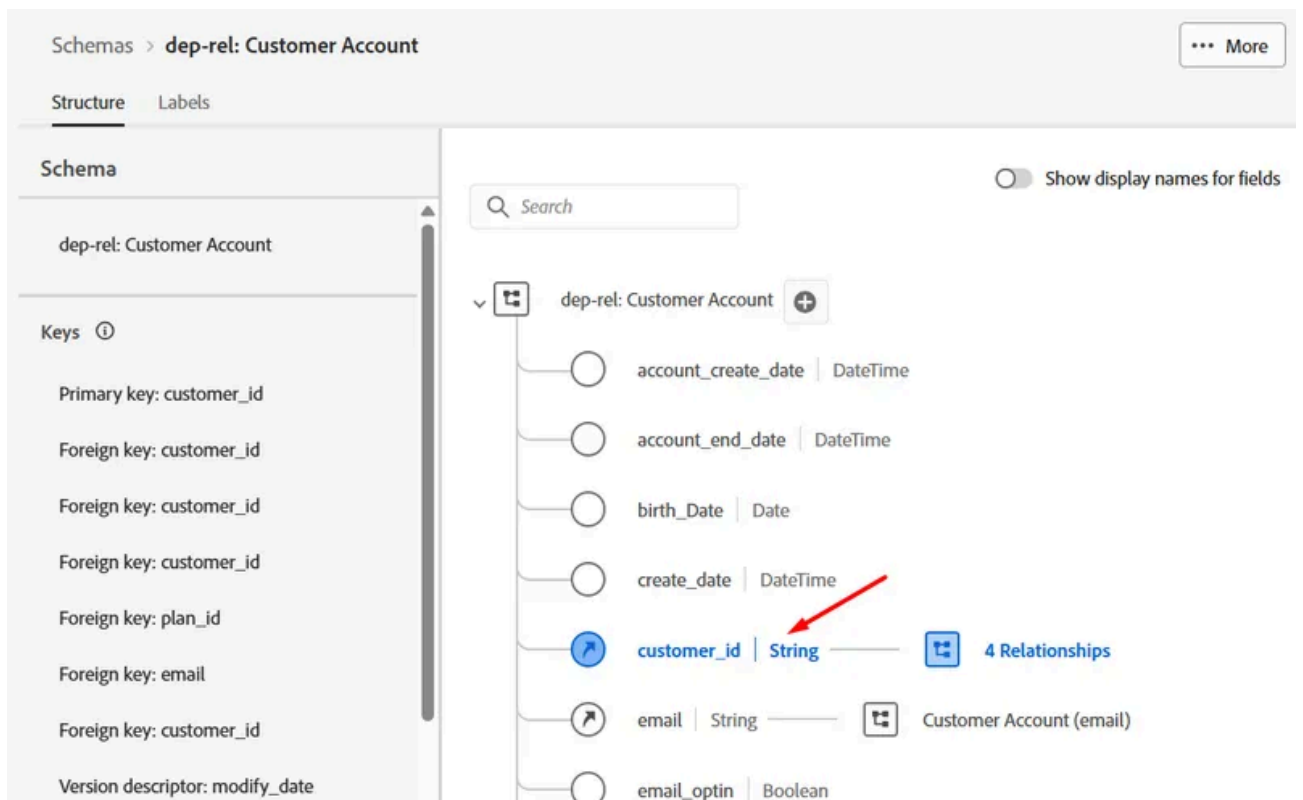
2. Click on **Schemas** under the Data Management menu and make sure you have the **Browse** tab selected.
3. Search for the schema called `dep-rel: Customer Account`

The screenshot shows the Adobe Journey Optimizer interface. On the left is a navigation sidebar with icons and labels for Home, Journey management, Campaigns, Journeys, Reports, Decision Management, Offers, Components, Use Case Playbooks, Decisioning, Catalogs, Strategy setup, Content Management, Data management, Schemas, and Datasets. The 'Schemas' item is highlighted with a red box. The main content area is titled 'Schemas' and has tabs for Overview, Browse, Classes, Field groups, Data types, and Relationships. The 'Browse' tab is selected and highlighted with a red box. Below the tabs is a search bar with a funnel icon and the text 'dep-rel: Customer Account', also highlighted with a red box. Below the search bar is a table with the following columns: NAME, IDENTITIES, RELATIONSH..., and ENABLED. The table contains one row with the name 'dep-rel: Customer Account', a dash in the identities column, the number '6' in the relationships column, and 'Not en...' in the enabled column.

NAME	IDENTITIES	RELATIONSH...	ENABLED
dep-rel: Customer Account	-	6	Not en...

Search for schema dep-rel: Customer Account

4. Open the schema by clicking on its name and then click on the field **customer_id**



Select schema field customer_id

5. In the right rail locate the checkbox named **Identity**, **check the box** and choose the Identity namespace titled **customerID**

Choose the identity namespace customerID

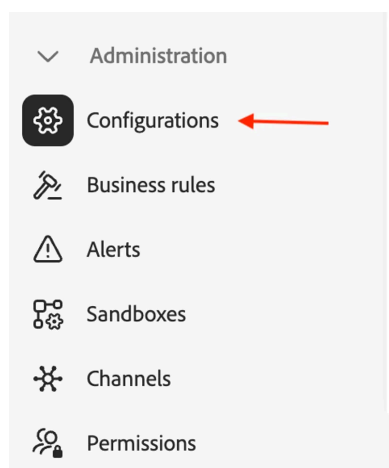
6. Click the **Save** button to save your schema. A confirmation message will show up
7. Click on **Cancel** button or the **Schemas** in the left hand rail to exit the schema UI

If you do not save the schema after adding the identity label the next set of configuration steps will not work

After Save, it takes a few minutes (under 5 mins), before it shows up on the Profile Target Dimension drop down in the next step.

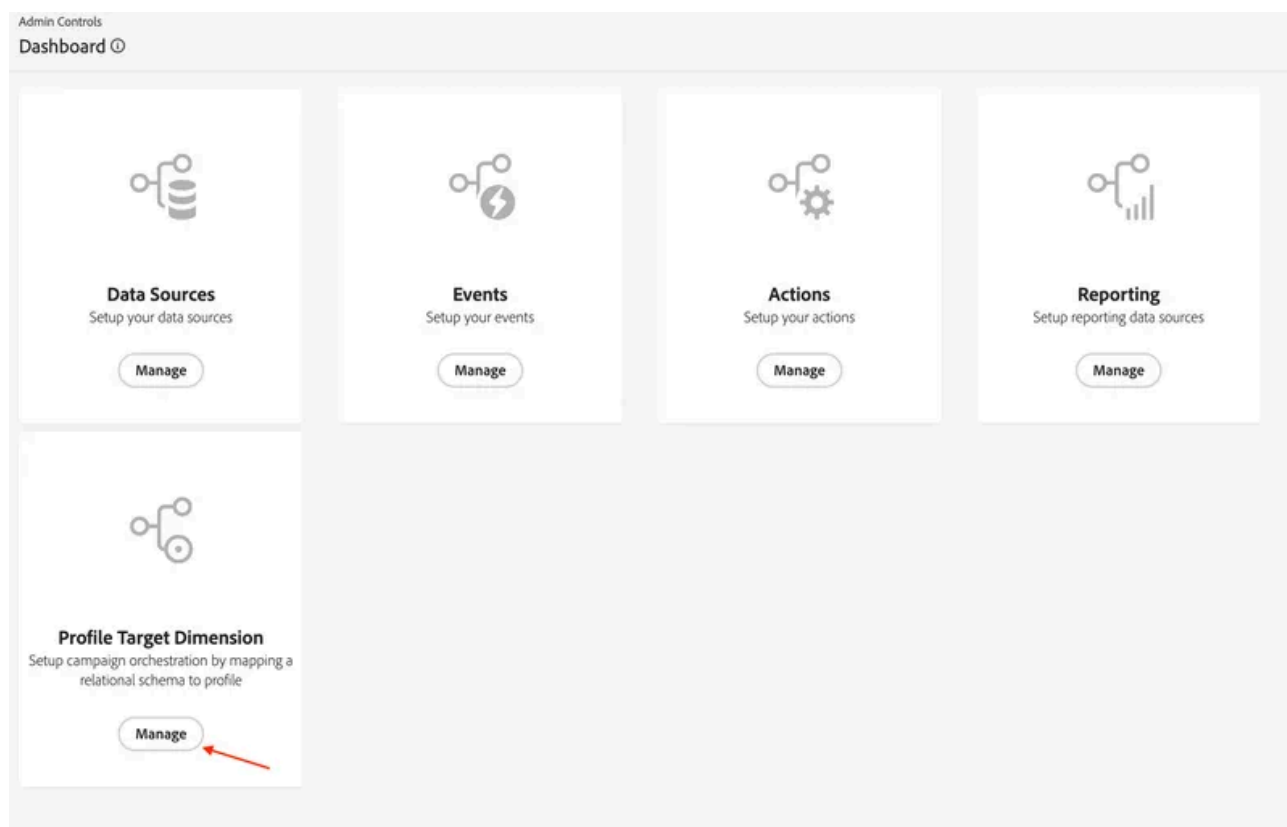
Create the Profile Target Dimension

1. Click on **Configurations** under **Administration**



Configurations

2. Select **Profile Target Dimension** and click on **Manage**



Profile Target Dimension

3. The Profile Target Dimension pane opens, click on **Create**

Profile Target Dimension

Q

Name Identity Namespace Created by + Creation date

Create

4. Select the schema **dep-rel: Customer Account** from the drop-down.

Note: It might take a few minutes for the schema to appear in this screen after marking the identity. Refresh the page and repeat the previous two steps until the schema appears.

Cancel Save

Create Profile Target Dimension

Profile target dimension is a 1:1 mapping between a profile and a relational schema. It is used to send messages on a profile while leveraging relational data.

⚠ Do not select a non people schema (e.g., purchases). You need a schema directly tied to a profile (e.g., recipients)

Schema * ⓘ

Select a schema ▼

dep-rel: Customer Account

Create Profile Target Dimension

5. For the **Identity value** select **/customer_id**

Cancel

Save

Create Profile Target Dimension

Profile target dimension is a 1:1 mapping between a profile and a relational schema. It is used to send messages on a profile while leveraging relational data.

 Do not select a non people schema (e.g., purchases). You need a schema directly tied to a profile (e.g., recipients)

Schema * ⓘ

dep-rel: Customer Account

Identity value * ⓘ

Select an identity value

/customer_id

Select Identity value

A relational schema can have many fields labeled with identities hence this being a list box.

- Click the **Save** button to create the Profile Target Dimension. You should then see the record appear.

Profile Target Dimension			
Q 1 of 1			
Name	Identity Namespace	Created by	↓ Creation date
dep-rel: Customer Account - customer_id	customerID	Chakravarthy Kalva	12/14/2025 11:36 PM

Profile Target Dimension saved

The name of the record created is a concatenation of the schema name (*dep-rel: Customer Account*) and the field labeled with the identity (*customer_id*)

Congratulations! this concludes the Profile Target Dimension creation step in the lab.

Recap

You have now seen how easy it is to navigate the Schema, mark an attribute as an Identity and create the Profile Target Dimension.

You can read more [here](#) if you are interested.

3.2.3. Read an Audience

Objective

In the next set of steps you will create a campaign to read an audience from AEP and use it along with the Profile Target Dimension created earlier. Use the Split activity to split the data based on a condition. Finally test the campaign to understand how these audiences work when used with the Relational schema.

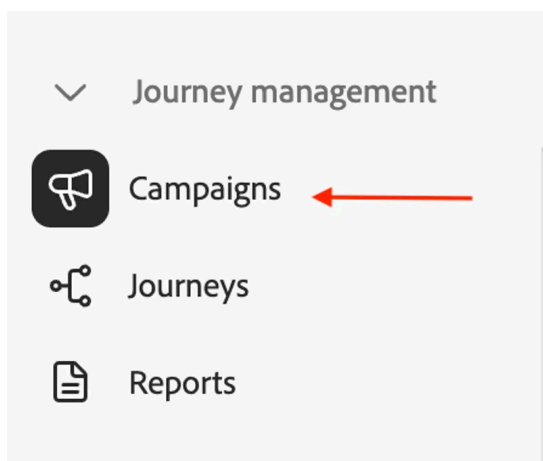
Read Audience

This lab covers using the Read audience activity in conjunction with the Relational schema for enrichment.

Orchestrated Campaign uses the Relational schema for all the activities. When using the Read audience activity, which reads the audience from AEP, a corresponding Entity (Target Dimension) should be configured to reconcile the audience with the Campaign Target Dimension.

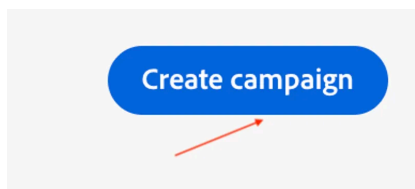
Create a Campaign

1. In the left side rail, click on **Campaigns**



Navigate to Campaigns

2. Click on **Create campaign**



Create campaign

3. Select **Orchestration - Marketing** and click on **Confirm**

Select Orchestration - Marketing

4. Provide Campaign details as follows and then click the **Save button**

- Name: **OC-RSL-ReadAudience-Test**
- Description: **RSL-Read Audience Test**

Campaign settings

Name *

OC-RSL-ReadAudience-Test ← 1

Description

RSL-Read Audience Test ← 2

Merge policy

Default Timebased ▼

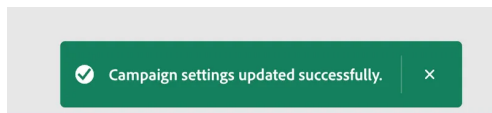
Tags

▼

Cancel Save ← 3

Campaign settings

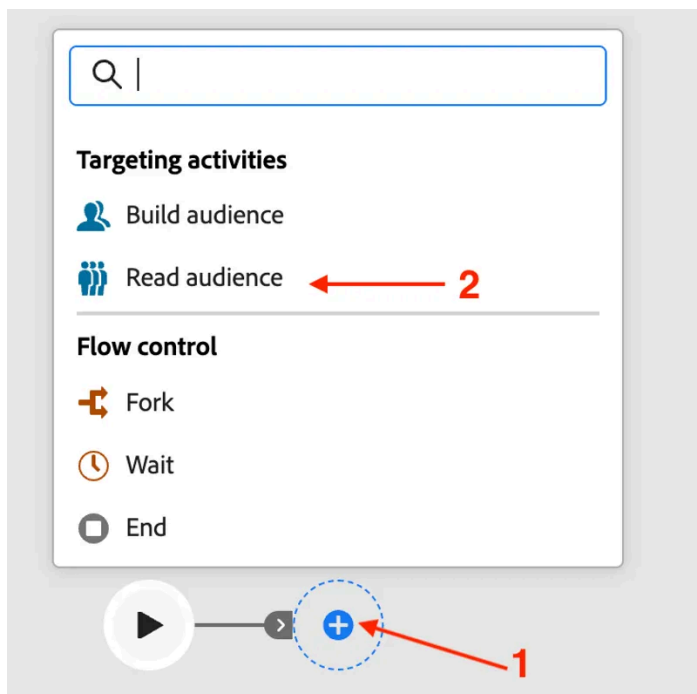
5. Wait for the confirmation message



Campaign settings updated

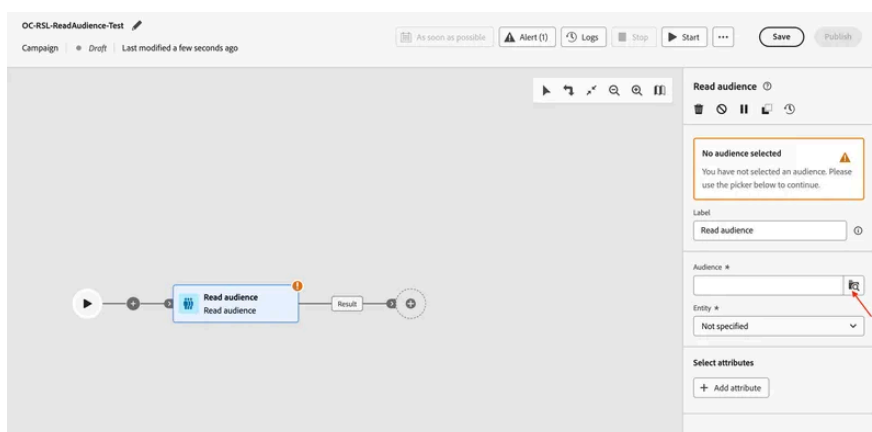
Add Read Audience Activity

1. Click on the **+** inside the canvas to open the options menu and then select **Read audience** from the **Targeting activities**



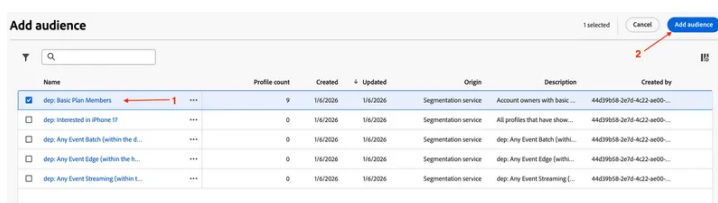
Read Audience

2. In the **Read audience** details pane, click on the Search icon for **Audience**



Specify audience

3. Select the **dep: Basic Plan Members** audience with Profile Count of **9** and click on **Add audience**



Select dep: Basic Plan Members audience

4. Next click on the drop down for **Entity** and select the `dep-re1: Customer Account - customer_id` Campaign Target Dimension

Read audience ?

🗑️ 🚫 ⏸️ 📄 ⌛

No entity selected ⚠️

You have not selected an entity. Please use the picker below to continue.

Label

dep: Basic Plan Members ⓘ

Audience *

dep: Basic Plan Members 🔍

Entity *

Not specified ▼

Not specified ✓

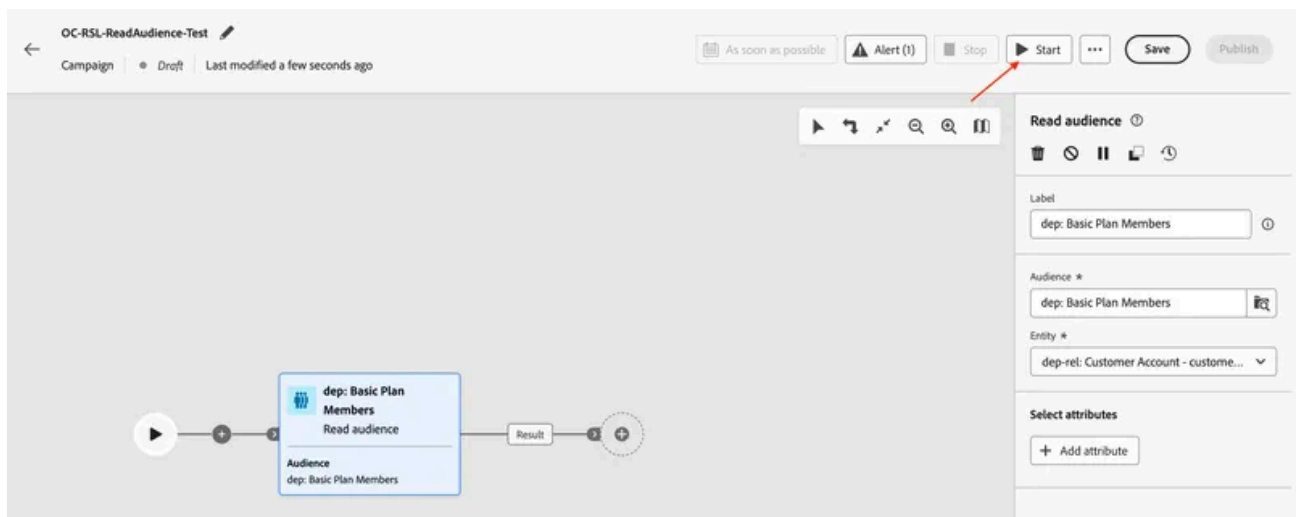
dep-rel: Customer Account - customer_id ←

Specify Entity/Target Dimension

Other attributes can also be extracted from the AEP Profile for use in the canvas using the **Add attribute** button. But for this lab, extra attributes are not required, so that step is skipped.

Test the Campaign

1. The settings for the **Read Audience** activity are filled in. Click on **Start** to run the campaign in **Test mode**

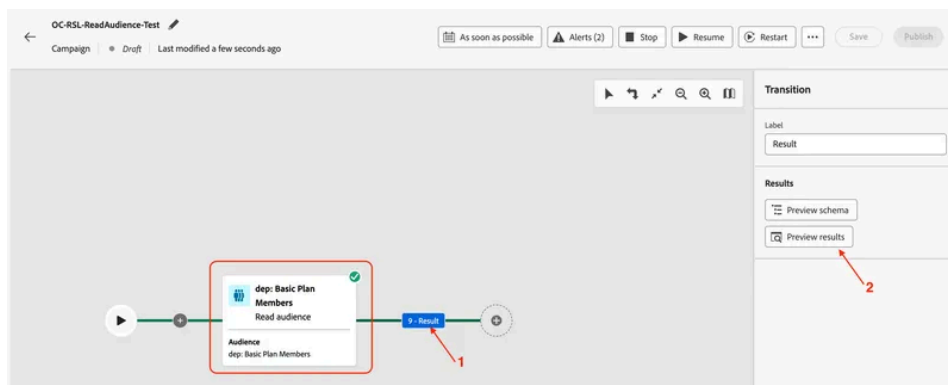


Start campaign in Test mode

This will take a few minutes to run.

Test mode permits the execution of the campaign to verify and monitor its behavior along with the results from each activity. The activities get executed sequentially through to the end of the canvas.

- The test execution starts and the results are displayed when completed. Click on the **Result** node and then Preview results to see the execution results



Review test results

- Notice that **2** (out of 9) profiles from the **Read audience** do not have a corresponding matching **Target dimension** from the relational schema (i.e. they exist in the Profile store but not the relational store). And since Orchestrated Campaign works off the Relational schema, the unmatched `customer_id` (**2**) from the **Read audience** will be dropped and only the matching ones, **7** in this case, will be usable in subsequent activities that leverages **relational data** in the campaign

Preview results Close

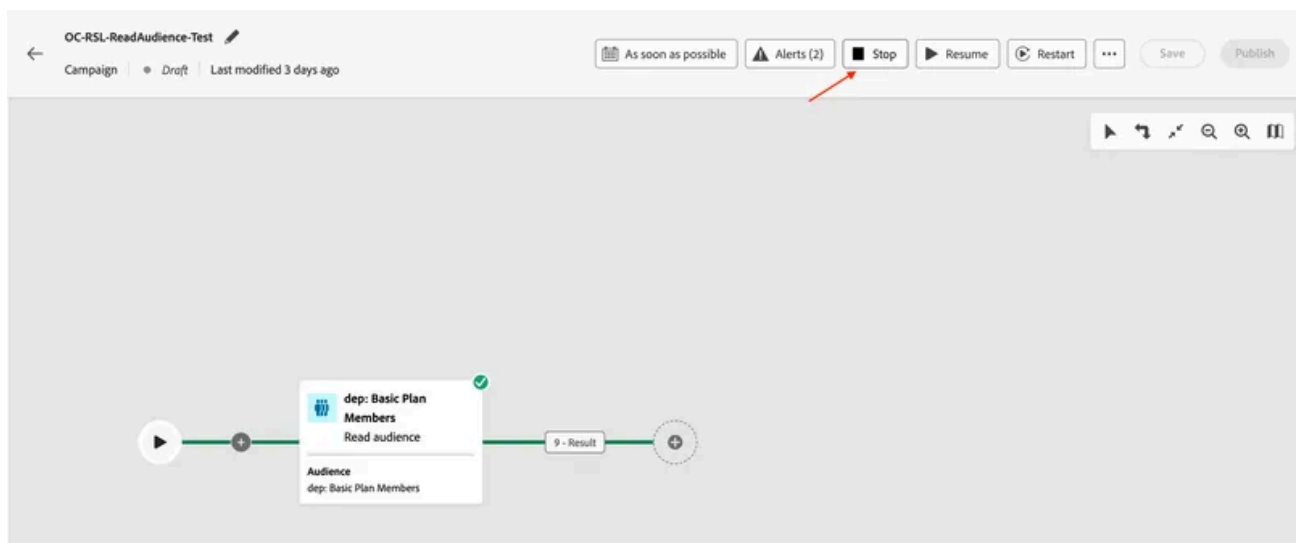
9 of 9

Targeting dimension	Customer ID
95469096	95469096
96606567	96606567
89816766	89816766
95888219	95888219
93899739	93899739
88031488	88031488
91766073	91766073
	98203520
	94341266

Missing Target Dimension

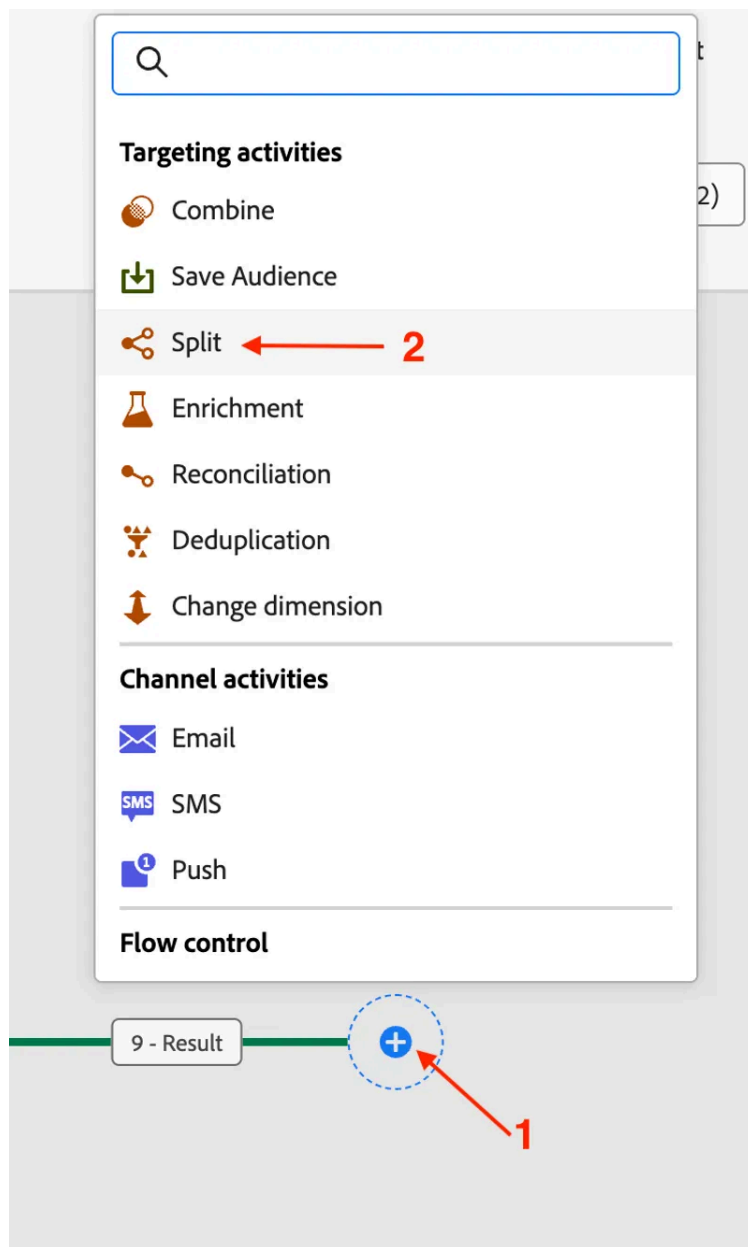
In the following steps, we will attempt to use the relational data and confirm the above statement of unmatched `customer_id` getting dropped.

4. Click on **Stop** to stop the **Test mode** of the campaign



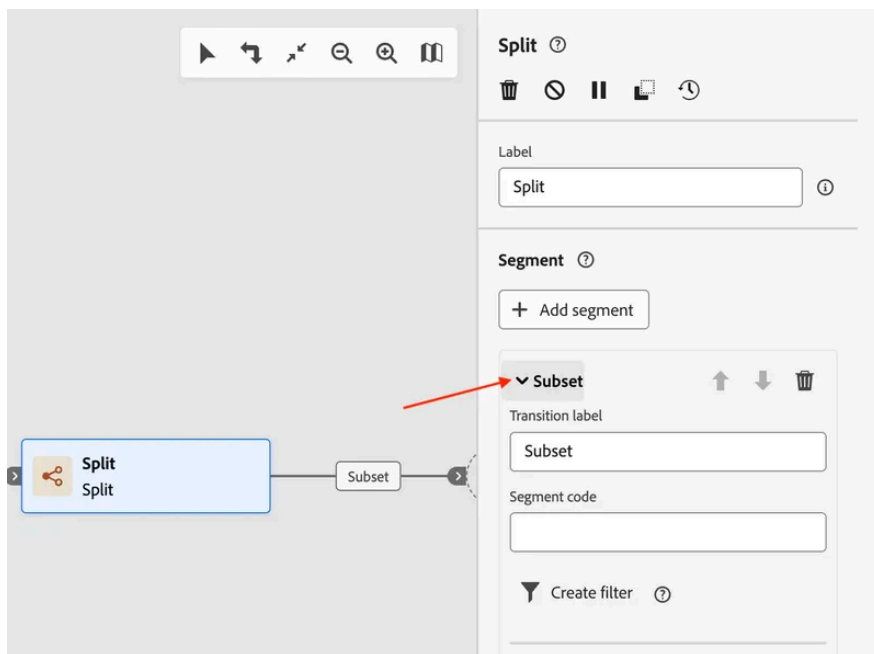
Stop test mode

5. Click on the **+** at the end of the flow and add **Split** from the **Targeting activities**



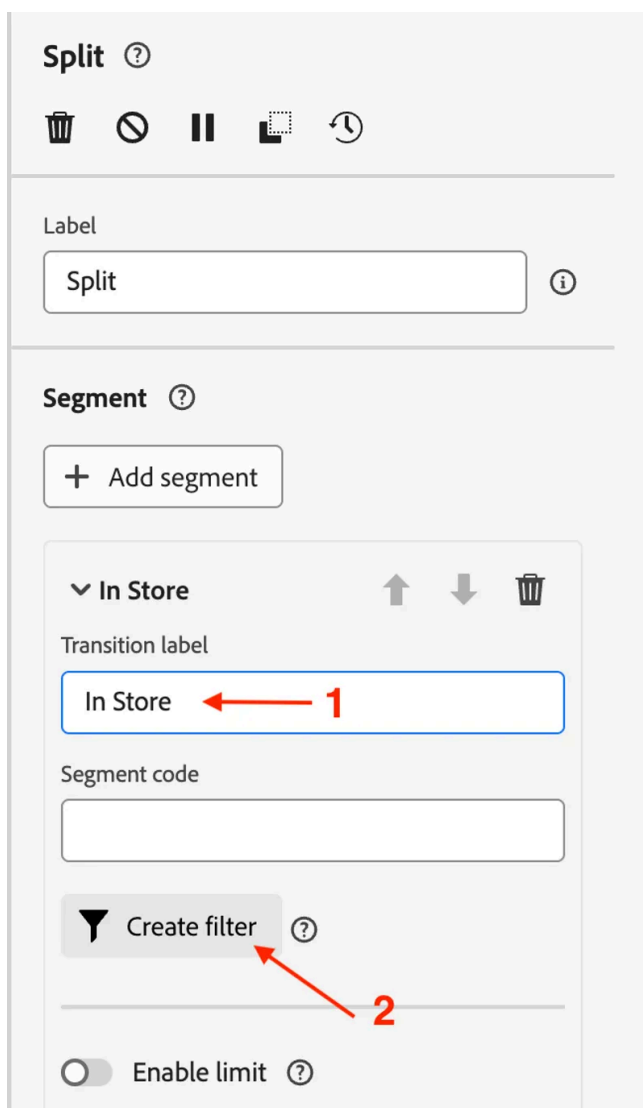
Add Split

6. In the details pane of the **Split** activity, expand the first split called **Subset**



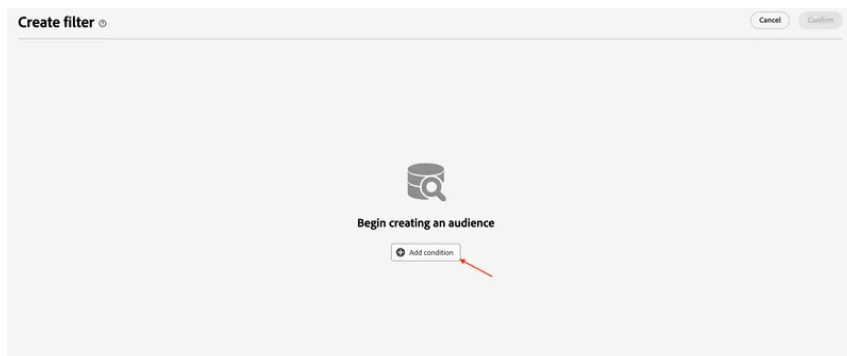
Update default Split segment

7. Rename it to **"In Store"** and click on **Create filter** to set the filter condition



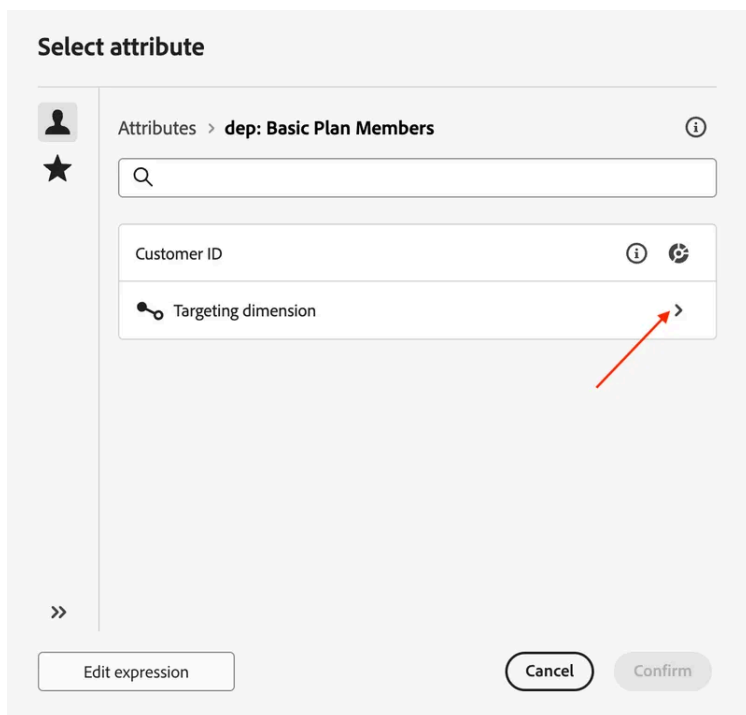
Rename segment

8. In the **Create filter** pane, click on **Add condition**



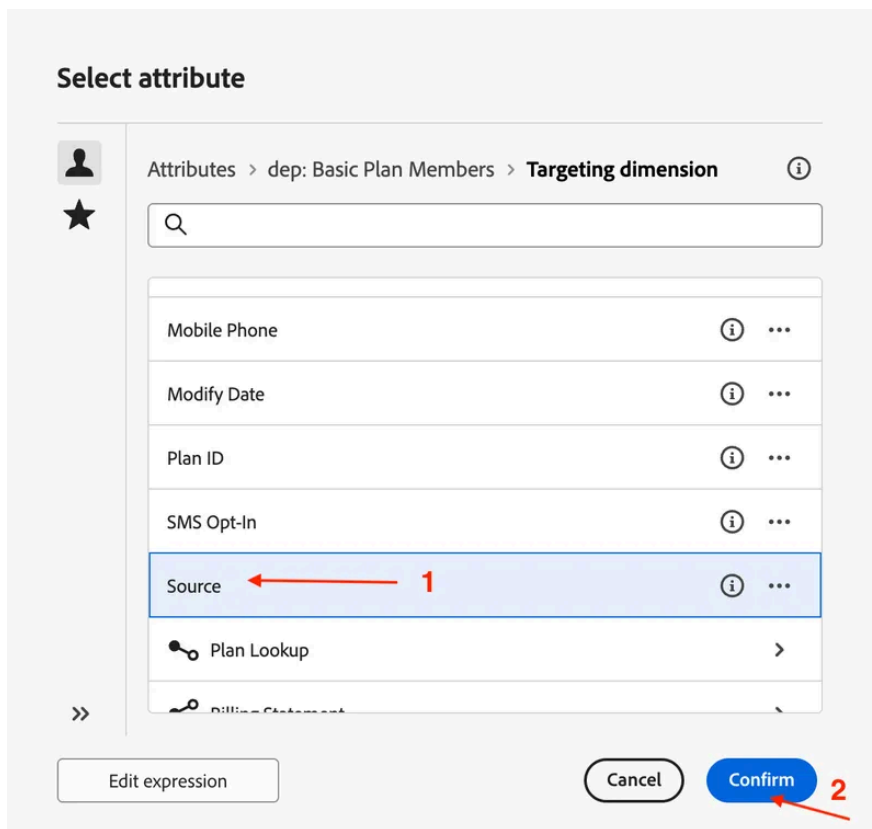
Add condition

9. Since no other attributes were extracted from the AEP Profile, the only AEP Profile attribute available here is the **Customer ID**. However, columns from the relational store corresponding to the matching Target dimension are available for setting up the filter condition. Expand the **Targeting dimension** by clicking on >



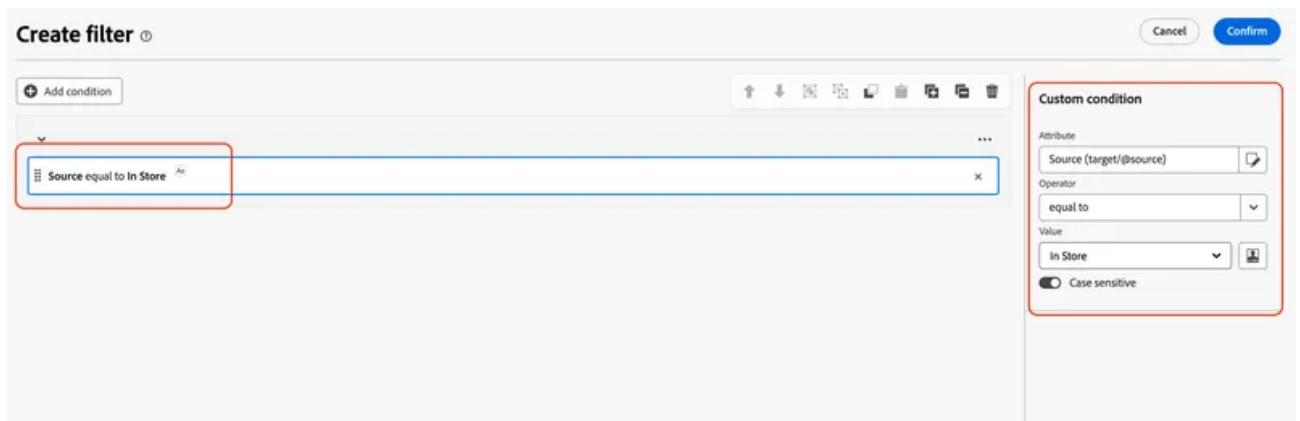
Expand Targeting dimension

10. Select **Source** from the list and click on **Confirm**



Select Source attribute

10. The distinct values for the Source column are available in the drop down. For the **Custom condition**, select "**In Store**" from the drop down and click on **Confirm** to exit



Set condition

11. Back in the details pane of the **Split** activity, the settings for the first Split are complete. Click on **Add segment** to the second split

Split ?

🗑️ ⛔ ⏸️ 📄 ⌛

Label

Split ⓘ

Segment ?

+ Add segment

▼ In Store ⬆️ ⬆️ 🗑️

Transition label

In Store

Segment code

🔍 Edit filter ⓘ ✕

Source equal to In Store

Add new segment

A new segment with the name **Result** is created

Segment ?

+ Add segment

> In Store ↑ ↓ 🗑️

▼ Not In Store ↑ ↓ 🗑️

Transition label

Not In Store ← 1

Segment code

🔍 Create filter ? 2

☐ Enable limit ?

☐ Skip empty transition ?

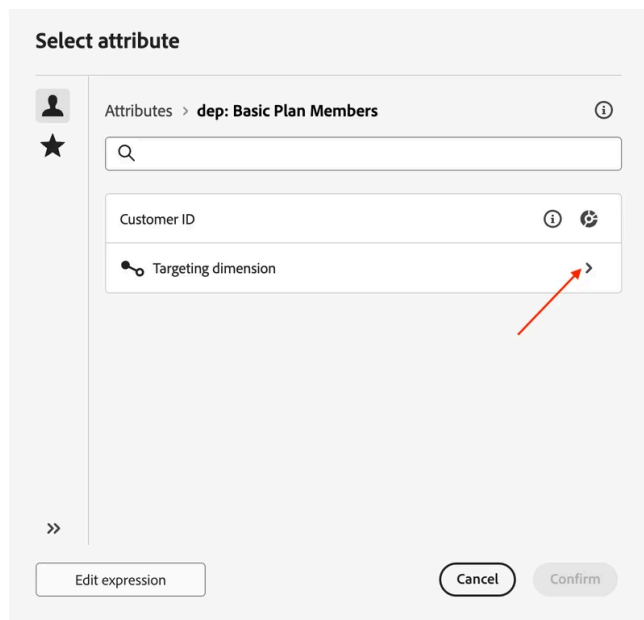
☐ Generate complement ?

☐ Enable overlapping of output populations ?

☐ Generate all subsets in the same table ?

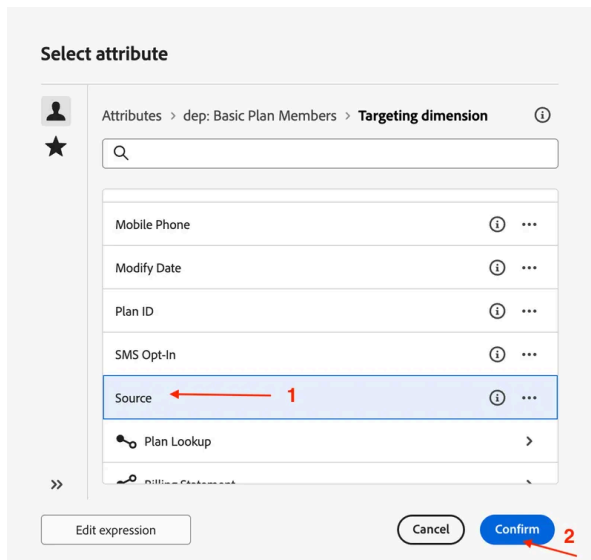
Rename segment and add filter

14. In the **Create filter** pane, click on **Add condition**. Follow the same approach as above, expand the **Targeting dimension** by clicking on >



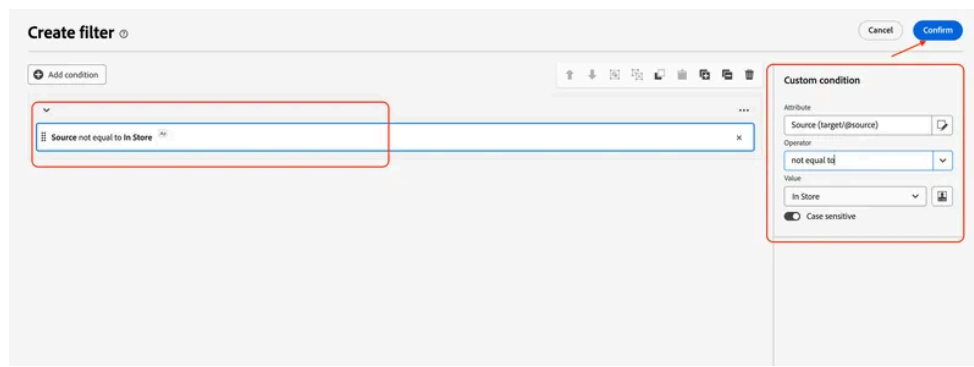
Expand Targeting dimension

Select **Source** from the list and click on **Confirm**



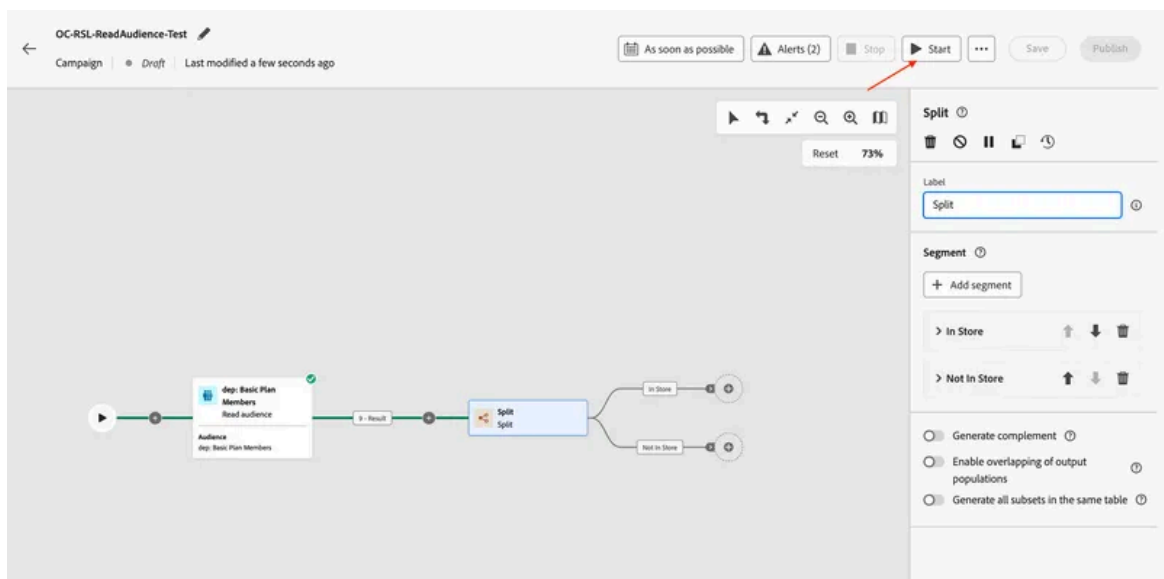
Select Source attribute

15. For the **Custom condition**, select "**In Store**" from the drop down and for the operator select "**not equal to**". Click on **Confirm** to exit



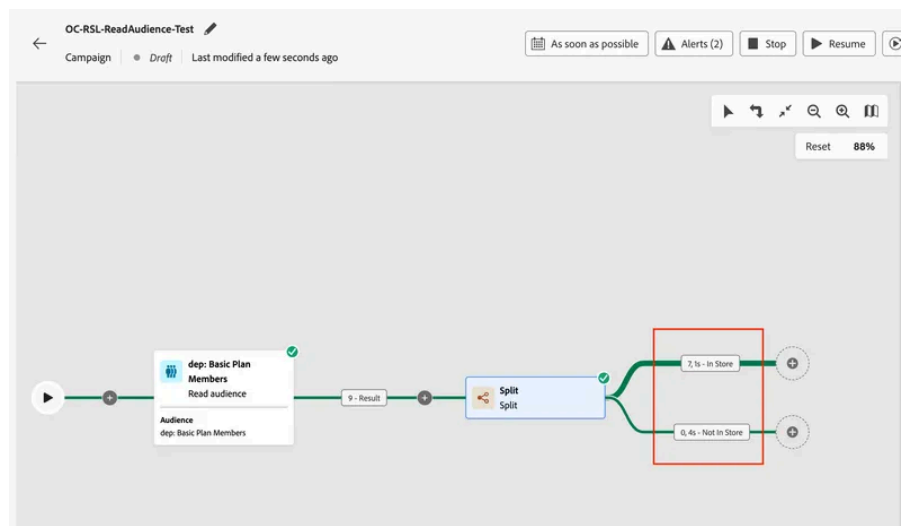
Set condition

16. Back in the details pane of the **Split** activity, the settings for the two Splits are complete. Click on **Start** to run the campaign in **Test mode**



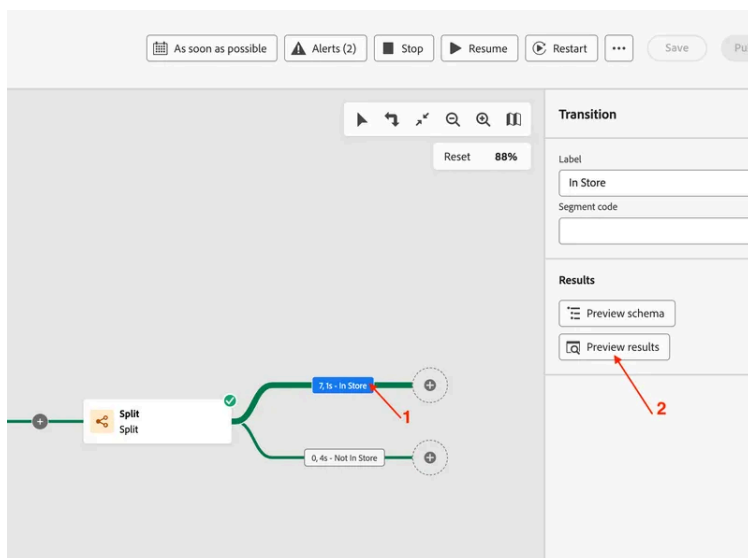
Start campaign in Test mode

17. The test execution begins and the results are displayed upon completion. Since only **7** matching Target dimension were found in the Relational schema, the same count is observed post the Split operations (**7** and **0**) as well



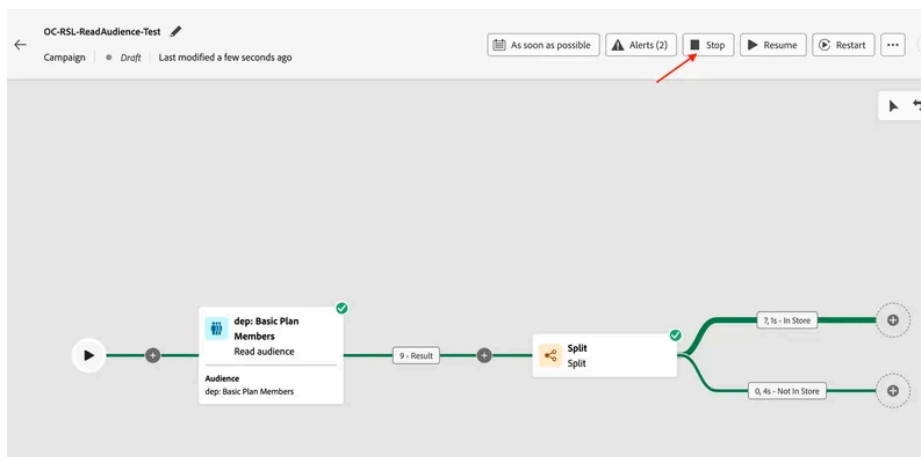
Verify counts

18. Click on each result box and **Preview results** to view the results



Preview results

19. Click on **Stop** to stop the **Test mode** of the campaign



Stop Test mode

While the Read audience showed **9** profiles. Since we built a filter on Source and the Source field exists in the Relational store, we had to join from the Profile store to the Relational store to check it. When it was joined with the Relational schema, via the Campaign Target Dimension, only a total of **7** profiles matched. These **7** matched customer ids are available for use in the following activities that attempts to use relational data. All of the **7** customer ids had `Source` set to **"In Store"**, which was evident via the Split flows.

Hence, maintaining data consistency is critical when using AEP Profiles along with their relational counterparts for enrichment.

Congratulations, this completes the lab on using the Read Audience activity with Relational schema.

Recap

You have now seen how easy it is to create a Campaign, perform a Read Audience activity along with the Profile Target Dimension to leverage the relational schema. You used the Split activity to split the audience based on a condition. Finally, the test mode helped understand that it is important to have the data consistency between the Profile and the Relational schema.

You can read more [here](#) if you are interested.

3.2.4. Summary

Through this lab you did the following activities:

- Browsed schemas and viewed relationships between schemas
- Setup a Profile Target Dimension
- Built an Orchestrated Campaign using a variety of workflow activities
- Constructed an audience using a Read Audience activity and used it along with the Relational schema attributes
- Use the test mode in campaign and understand the behavior when using AEP audiences in conjunction with relational schema

Congratulations, you now can proceed to the next lab and do that one as well!

3.3. Configure Email Channels

Learning Objectives

- Configure Email channel using AEP Profile attribute for Orchestrated Campaigns
- Configure Email channel using Relational schema attribute for Orchestrated Campaigns

The Email channels will be used in the next lab to help understand the nuances of using one configuration over the other.

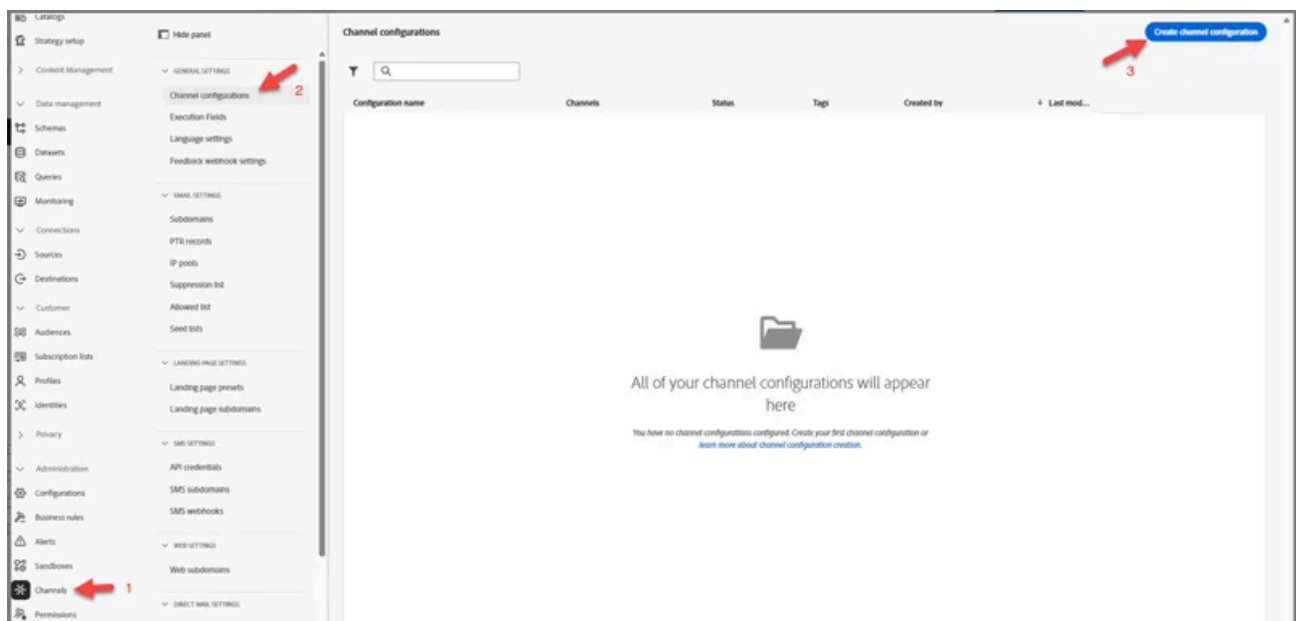
3.3.1. Configure for Profile

Objective

In the next set of steps you will create an Email Channel Configuration with both Journeys and Orchestrated Campaigns using the `personalEmail.address` AEP Profile attribute

Create Channel Configuration

1. Navigate to **Channel Configurations** found under the menu **Administration** → **Channels** → **General settings**
2. Click the **Create configuration** button



Create channel configuration

3. In the Create wizard set the following values:

- **Name:** `Profile-Email`
- **Channel:** `Email`
- **Marketing action:** `Email Targeting`

* Required

Channel configuration details [?]

When setting up a channel configuration, select the channel it applies to, and define all the technical parameters required for your sending, such as email type, sender name, mobile apps, SMS configuration, and more.

Name *

Profile-Email ← 1 ✓

Description

Access management labels

No labels selected

Select channel *

Email ← 2 ▼

Marketing action [?]

Select one or multiple marketing actions ▼

Email Targeting × ← 3

Channel configuration details

Note: On selecting Email as the channel, a new section **Email settings** shows up.

Configure Email Type

Set the **Email Type** to **Marketing**

Email settings

Email type [?]

Select one *

☒ Marketing ☐ Transactional

Email Type

Configure Subdomain

From the **Subdomain** dropdown, select **email.dep-labs.com**

Subdomain

☐ Dynamic subdomain [?]

Subdomain *

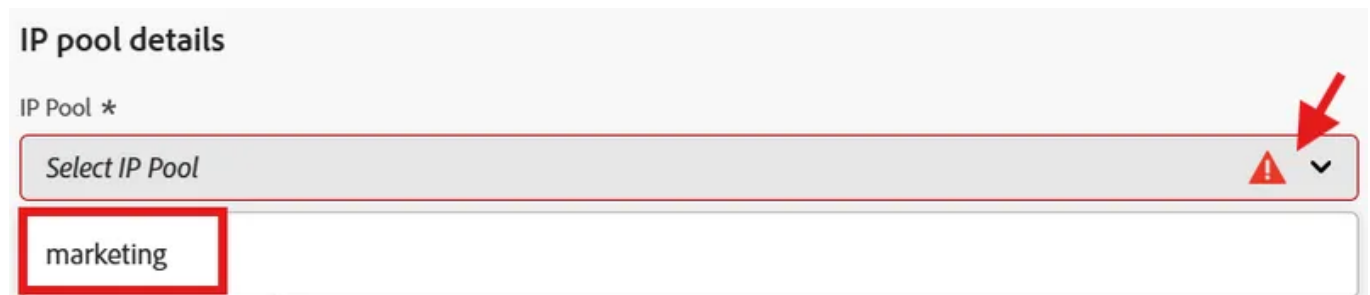
email.dep-labs.com ↘ ▼

email.dep-labs.com ✓

Configure Subdomain

Configure IP pool details

From the **IP pool** dropdown, select **marketing**



IP pool details

IP Pool *

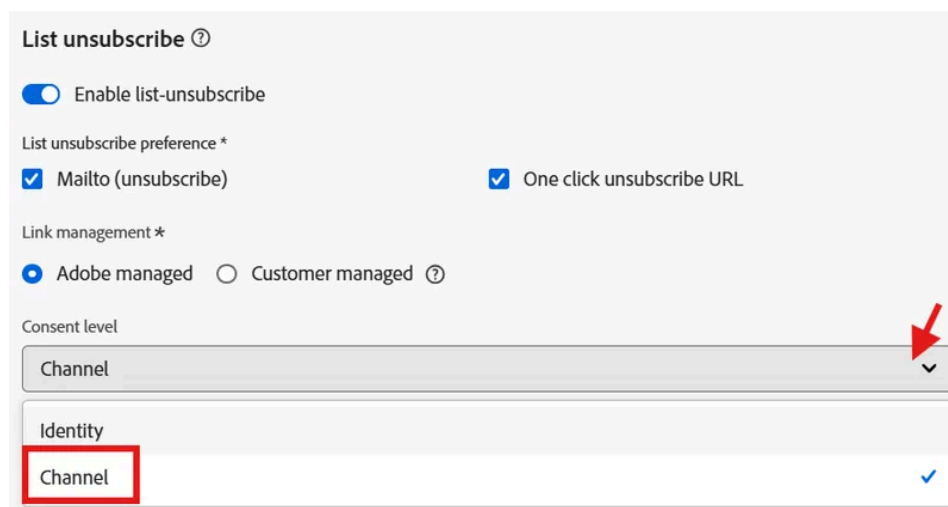
Select IP Pool

marketing

IP pool details

Configure List unsubscribe

1. Ensure that the toggle is **enabled** for list-unsubscribe
2. Under the List unsubscribe preference area make sure all the checkboxes are **checked**
3. Under Link management make sure **Adobe managed** is selected
4. For the Consent level make sure this is set to **Channel**



List unsubscribe ?

☒ Enable list-unsubscribe

List unsubscribe preference *

☒ Mailto (unsubscribe) ☒ One click unsubscribe URL

Link management *

☒ Adobe managed ☐ Customer managed ?

Consent level

Channel

Identity

Channel

Config List unsubscribe

Configure Header Parameters

1. Set the the following fields as follows:
 - **From name:** DEP Labs
 - **From email prefix:** dep
 - **Reply to name:** DEP Labs Support

- **Reply to email:** `reply@email.dep-labs.com`
- **Error email prefix:** `error`

Header parameters

From name *

DEP Labs ✓ 

From email prefix *

dep ✓ 

Email input will be suffixed by **email.dep-labs.com** to send the email

Reply to name *

DEP Labs Support ✓ 

Reply to email *

reply@email.dep-labs.com ✓ 

Error email prefix *

error ✓

Email input will be suffixed by **email.dep-labs.com** to send the email

Header parameters

Configure Bcc Email

Leave this blank

You can keep a copy of sent emails by sending them to a BCC inbox. Enter the email address of your choice so that every email sent is blind-copied to this BCC address. Note that the BCC address domain must be different from any subdomain delegated to Adobe. This feature is optional. [How to use BCC for emails](#)

Configure Email retry parameters

Leave with the default settings of **Hours** set to **84**

Configure URL tracking parameters

Leave with the default settings

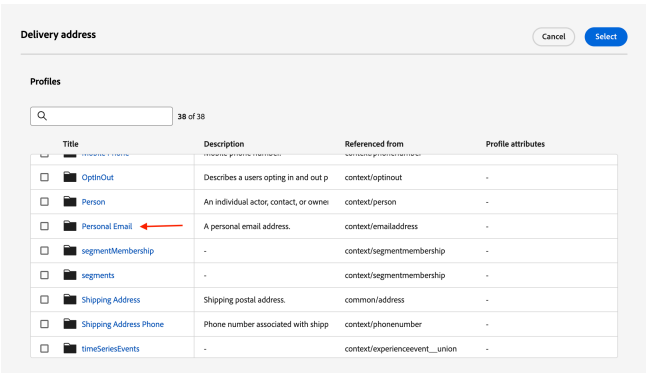
Execution Details

1. Complete the **Execution details** section. Under **Journey and Action** tab → **Execution dimension**, select **Profile** as **Source** and click on the Edit icon for **Delivery address** under the **Execution Address** section



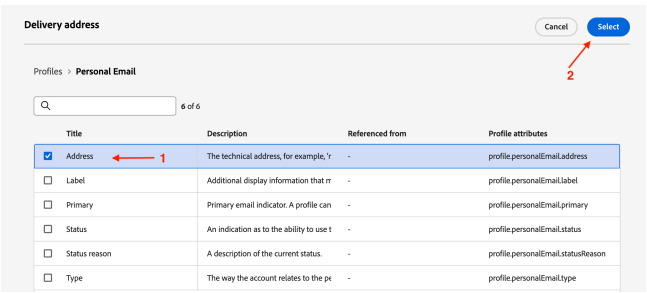
Execution details

2. Click on the folder titled **Personal Email** to open it up



Delivery address

3. Click the **checkbox** on the **Address** field then click the **Select** button



Personal Email as Delivery address

4. For **Profile**, the `personalEmail.address` is now configured as the **Delivery address** under **Execution Address** section

Execution details

Journey & Action Orchestrated campaign

Execution dimension

Deliver one message per:

☒ Profile

Execution Address ⓘ

Delivery address

personalEmail.address

Delivery address configured

5. Click on the Orchestrated campaign tab and **check** the Enabled checkbox.

Execution details

Journey & Action **Orchestrated campaign**

☒ Enabled

Orchestrated campaign configuration

6. Under the Execution dimension heading configure the following:

- **Deliver one message per:** Target Dimension
- **Profile Target Dimension:** dep-rel: Customer Account - customer_id

Execution dimension

Deliver one message per: *

☒ Target Dimension ☐ Target + Secondary Dimension

Profile Target Dimension *

Select target dimension linked to profile

dep-rel: Customer Account - customer_id

Target Dimension

7. Under Execution Address configure the following:

- **Source:** Profile
- **Delivery address:** click on the Edit icon

Execution Address ?

Source

☒ Profile ☐ Target Dimension

Delivery address



Execution Address

8. Search for and click on the **Personal Email** folder to open it

Delivery address Cancel Select

Profiles

38 of 38

Title	Description	Referenced from	Profile attributes
☐ Mobile Phone	Mobile phone number.	context/phonenummer	-
☐ OptInOut	Describes a users opting in and out p	context/optinout	-
☐ Person	An individual actor, contact, or owner	context/person	-
☐ Personal Email	A personal email address.	context/emailaddress	-
☐ segmentMembership	-	context/segmentmembership	-

Personal Email Profile attribute

9. Select the **Address** field within the Personal Email folder and click on **Select**

Delivery address Cancel Select

Profiles > **Personal Email**

6 of 6

Title	Description	Referenced from	Profile attributes
☒ Address	The technical address, for example, 'r	-	profile.personalEmail.address
☐ Label	Additional display information that r	-	profile.personalEmail.label

Personal Email as Delivery address

10. For **Orchestrated campaign**, the **dep-rel: Customer Account - customer_id** is configured as **Profile Target Dimension** for **Execution Dimension** with **Execution**

Address having a **Source** of **Profile** and `personalEmail.address` as **Delivery address**

Execution dimension

Deliver one message per: *

☒ Target Dimension ☐ Target + Secondary Dimension

Profile Target Dimension *

dep-rel: Customer Account - customer_id

Execution Address ?

Source

☒ Profile ☐ Target Dimension

Delivery address

personalEmail.address

Execution dimension configured

For Orchestrated Campaigns you will be targeting the customer account with an email so you only need to send *one message per Profile*. The Execution address you will use will come from the Profile itself (i.e. what is stored in AEP Profile under the **personalEmail.address** attribute)

Review & Save

1. Review all details again to ensure they match.
2. Scroll up and click on **Submit**.

The processing of the Email channel configuration has been observed to take up to 2hrs! Yikes!

Continue on to the next exercise while you wait for this channel configuration to process.

□ Once the Email channel configuration status is **Active**, it is ready and can now be selected directly inside **Email activities** within Orchestrated Campaigns.

Recap

You have now seen how to create an Email Channel Configuration to use the AEP Profile attribute for both Journeys and Orchestrated Campaigns.

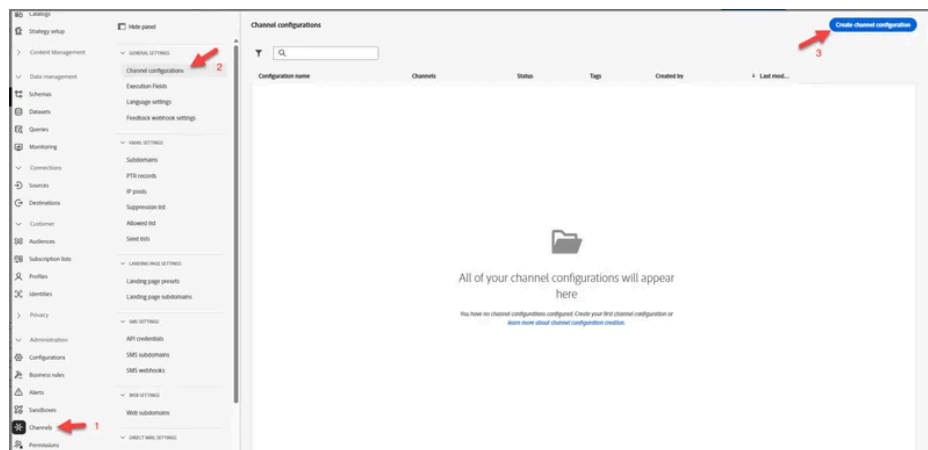
3.3.2. Configure for Relational

Objective

In the next set of steps you will create an Email Channel Configuration with **only** the Orchestrated Campaigns using the `email` attribute from the Relational schema `dep-rel: Customer Account`

Create Channel Configuration

1. Navigate to **Channel Configurations** found under the menu **Administration** → **Channels** → **General settings**
2. Click the **Create configuration** button



Create Channel configuration

3. In the Create wizard set the following values:
 - **Name:** `Relational-Email`
 - **Channel:** `Email`
 - **Marketing action:** `Email Targeting`

Channel configuration details ⓘ

* Required

When setting up a channel configuration, select the channel it applies to, and define all the technical parameters required for your sending, such as email type, sender name, mobile apps, SMS configuration, and more.

Name *

RelationalEmail ← 1 ✓

Description

Access management labels

No labels selected

Select channel *

Email ← 2 ▼

Marketing action ⓘ

Select one or multiple marketing actions ▼

Email Targeting × ← 3

Channel configuration details

On selecting Email as the channel, a new section Email settings shows up.

Configure Email Type

Set the **Email Type** to **Marketing**

Email settings

Email type ⓘ

Select one *

☒ Marketing ☐ Transactional

Email settings

Configure Subdomain

From the **Subdomain** dropdown, select **email.dep-labs.com**

Subdomain

☐ Dynamic subdomain ?

Subdomain *

email.dep-labs.com

email.dep-labs.com

Configure Subdomain

Configure IP pool details

From the **IP pool** dropdown, select **marketing**

IP pool details

IP Pool *

Select IP Pool

marketing

Configure IP pool details

Configure List unsubscribe

1. Ensure that the toggle is **enabled** for list-unsubscribe
2. Under the List unsubscribe preference area make sure all the checkboxes are **checked**
3. Under Link management make sure **Adobe managed** is selected
4. For the Consent level make sure this is set to **Channel**

List unsubscribe

☒ Enable list-unsubscribe

List unsubscribe preference *

☒ Mailto (unsubscribe)

☒ One click unsubscribe URL

Link management *

☒ Adobe managed ☐ Customer managed 

Consent level

Channel



Identity

Channel



Configure List unsubscribe

Configure Header Parameters

1. Set the the following fields as follows:

- **From name:** DEP Labs
- **From email prefix:** dep
- **Reply to name:** DEP Labs Support
- **Reply to email:** reply@email.dep-labs.com
- **Error email prefix:** error

Header parameters

From name *

DEP Labs ✓ 

From email prefix *

dep ✓ 

Email input will be suffixed by **email.dep-labs.com** to send the email

Reply to name *

DEP Labs Support ✓ 

Reply to email *

reply@email.dep-labs.com ✓ 

Error email prefix *

error ✓

Email input will be suffixed by **email.dep-labs.com** to send the email

Header parameters

Configure Bcc Email

Leave this blank

You can keep a copy of sent emails by sending them to a BCC inbox. Enter the email address of your choice so that every email sent is blind-copied to this BCC address. Note that the BCC address domain must be different from any subdomain delegated to Adobe. This feature is optional. [How to use BCC for emails](#)

Configure Email retry parameters

Leave with the default settings of **Hours** set to **84**

Configure URL tracking parameters

Leave with the default settings

Execution Details

1. In the Orchestrated campaign tab and **check** the Enabled checkbox.

Execution details

Journey & Action **Orchestrated campaign**

☒ Enabled

Configure Orchestrated campaign

2. Under Execution dimension configure the following:

- **Deliver one message per:** Target Dimension
- **Profile Target Dimension:** dep-rel: Customer Account - customer_id

Execution dimension

Deliver one message per: *

☒ Target Dimension ☐ Target + Secondary Dimension

Profile Target Dimension *

Select target dimension linked to profile

dep-rel: Customer Account - customer_id

Execution dimension

3. Under Execution Address configure the following:

- **Source:** Target Dimention
- **Delivery Address:** click on the Edit button

Execution Address ?

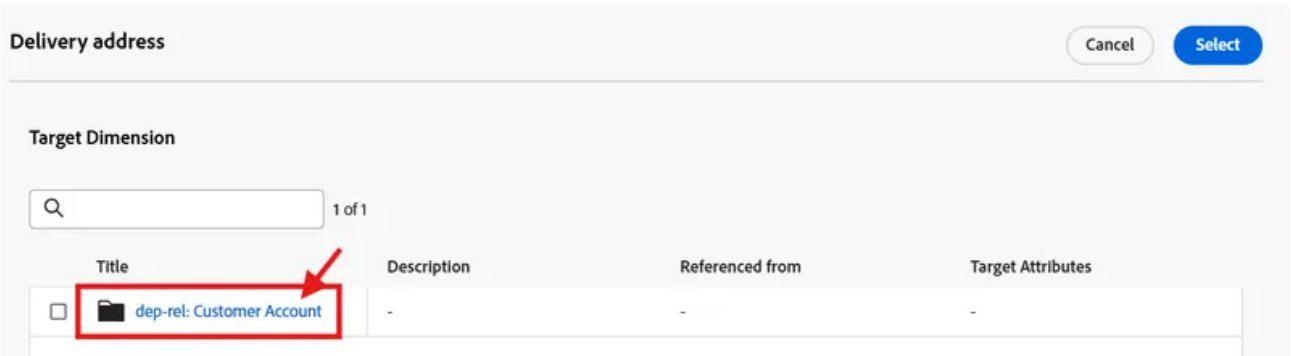
Source

☐ Profile ☒ Target Dimension

Delivery address

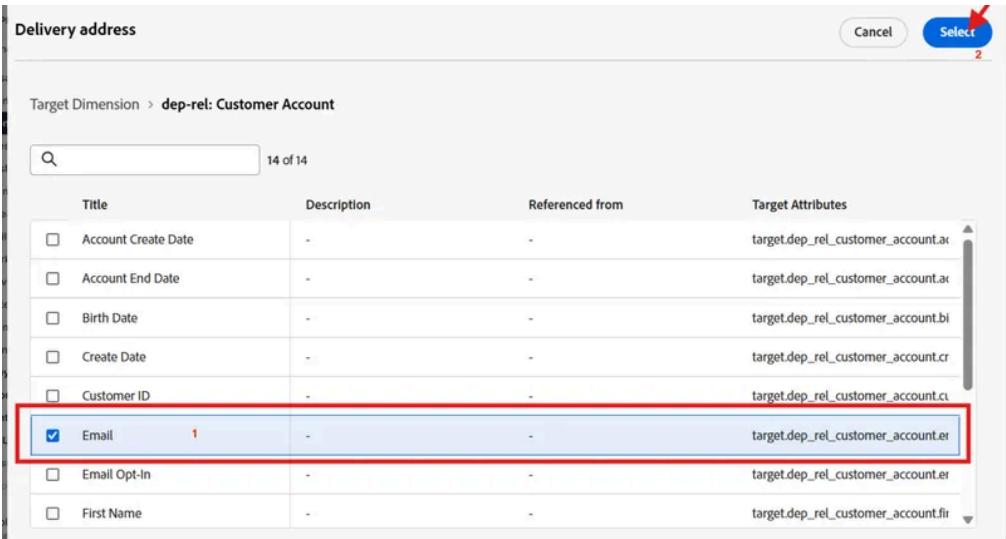
Target Dimension

4. In the pop-up, click into the folder **dep-rel: Customer Account**



Configure Delivery address

5. Select **Email** and click on the **Select** button



Email as Delivery address

6. When done your final Exectuion details should look like the below screenshot

Execution details

Journey & Action Orchestrated campaign

☒ Enabled

Execution dimension

Deliver one message per: *

☒ Target Dimension ☐ Target + Secondary Dimension

Profile Target Dimension *

dep-rel: Customer Account - customer_id

Execution Address ?

Source

☐ Profile ☒ Target Dimension

Delivery address

dep_rel_customer_account.email



Execution dimension configured

For Orchestrated Campaigns you will be targeting the customer account with an email so you only need to send one message per Target Dimension. The Execution address you will use will come from the Target Dimension itself (i.e. what is stored in the **dep-rel: Customer Account** table for **email** address)

Review & Save

1. Review all details again to ensure they match.
2. Scroll up and click **Submit**.
3. When you are done you should see two email channel configurations, both likely in a "processing" state.

The processing of the Email channel configuration has been observed to take up to 2hrs!

Recap

You have now seen how to create an Email Channel Configuration to use the Relational schema attribute for Orchestrated Campaigns.

3.3.3. Waiting for Active Status

Before you can continue to any future labs you need to make sure that both you email channel configurations are showing as **Active**

Relational-Email	...	Email	● Active
Profile-Email	...	Email	● Active

Email channel configurations showing as Active

☐ Once the Email channel configuration status is **Active** you can continue 😊

Recap

You have now seen how to create an Email Channel Configuration to use the Relational schema attribute for Orchestrated Campaigns.

4. Orchestrated Campaigns

4.1. Message Delivery in Action

Pre-Requisites

The below labs must have been completed before starting this lab

- **Data Stores -- Relational Store in Action → [Profile Target Dimension](#)**
- **Data Stores → [Configure Email Channels](#)** *(this setup step takes up to 3hrs to complete)*

If you have not completed these labs please do so now before continuing.

Learning Objectives

- Build an Orchestrated Campaign using a variety of workflow activities
- Construct an audience using the Build Audience activity
- Fork the audience to create two branches and use the Email channels, created in the previous lab, to send messages
- Test the campaign and understand the difference in behavior between the Email channels

In this lab, you will create a campaign to target "Basic" plan members and understand the difference when using different Orchestrated Campaign settings in the Email channel

configurations.

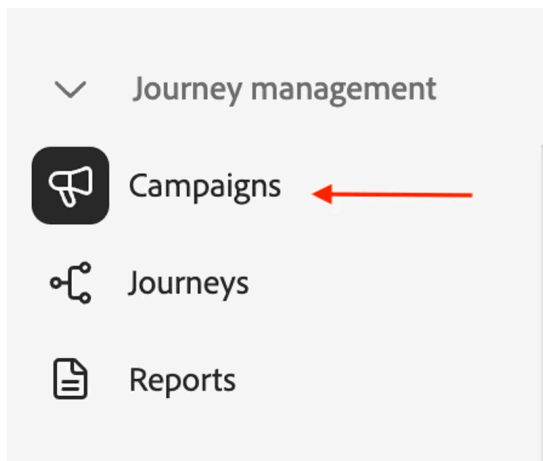
4.1.1. Create a Campaign

Objective

In the next set of steps you will start with creating an Orchestrated Campaign.

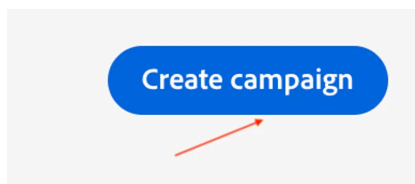
Create Campaign

1. In the left side rail, click on **Campaigns**



Campaigns

2. Click on **Create campaign**



Create campaign

3. Select **Orchestration - Marketing** and click on **Confirm**

Create your campaign

Adobe Journeys Optimizer offers various types of marketing campaigns ⓘ

 **Orchestration - Marketing**
Create your segmentation flow, craft your cross channel messages and plan your campaigns. Supported channels: Email, SMS, Push notification. ← 1

 **Scheduled - Marketing**
Deliver single or recurring outbound deliveries or ongoing inbound actions.

 **Scheduled - Transactional**
Deliver single or recurring outbound transactional actions.

 **API triggered - Marketing**
Deliver personalized marketing communications to targeted audiences. Supported channels: Email, SMS, Push notifications.

 **API triggered - Transactional**
Deliver transactional communications to individual profiles or sets of profiles. Supported channels: Email, SMS, Push notifications.

Cancel **Confirm**

2 →

Select Orchestration

4. Provide Campaign details below and then click the **Save button** when done

- **Name:** OC-MDL-Campaign-Test
- **Description:** OC Message Delivery Test

Campaign settings

Name *

OC-MDL-Campaign-Test ← 1

Description

OC Message Delivery Test ← 2

Merge policy

Default Timebased ▼

Tags

▼

Cancel **Save**

3 →

Provide Campaign details

5. Wait for the confirmation message before proceeding



Campaign settings updated successfully.



Settings updated

Recap

You created an Orchestrated Campaign with all the basic settings configured which will be used in the next set of steps.

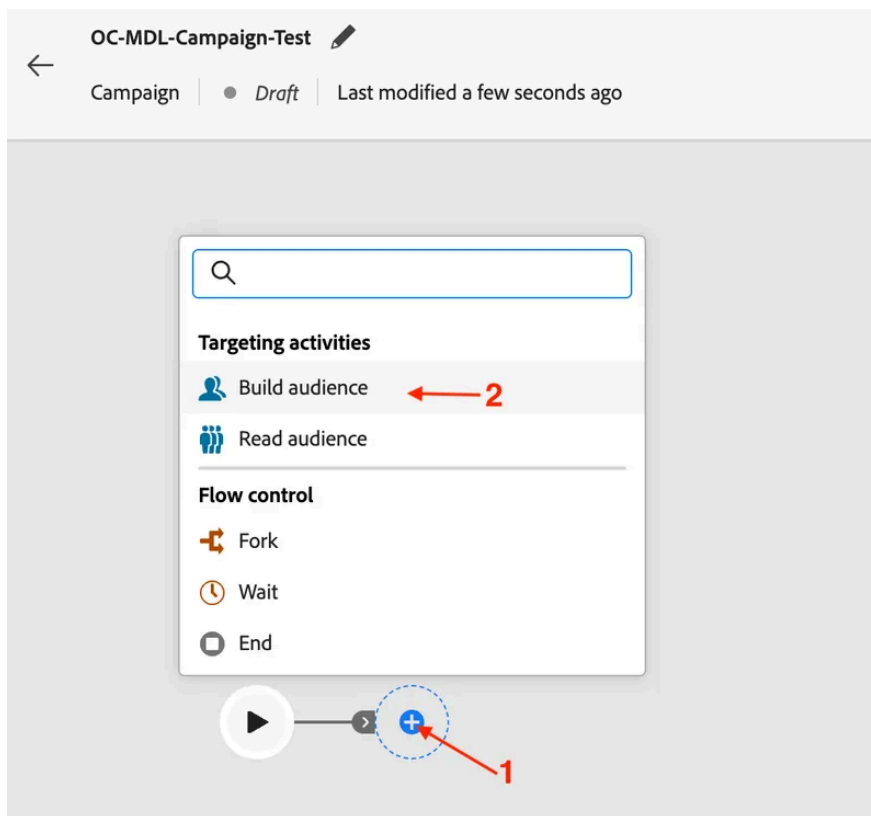
4.1.2. Build an Audience

Objective

In the next set of steps you will build an audience from the relational schema by selecting the right Targeting dimension and setting the appropriate conditions. You will also use the refresh option to check the expected number of row counts.

Build Audience

1. Once the campaign is rendered, click on the **+** within the canvas to open the options menu and then select **Build audience** from the **Targeting activities**



Build Audience

2. The **Build audience** activity opens the details pane on the right, click on the Search icon to select the **Targeting dimension**.

Build audience ?

🗑️ ⛔ ⏸️ 📄 ⌛

Label

Query ⓘ

Audience

Targeting dimension *

Recipients 🔍

Continue

If the audience is empty

☐ Generate an outbound transition

Select Targeting dimension

3. Select `dep-rel: Customer Account` from the list and click on **Confirm**

Targeting dimension

Item selected Cancel Confirm

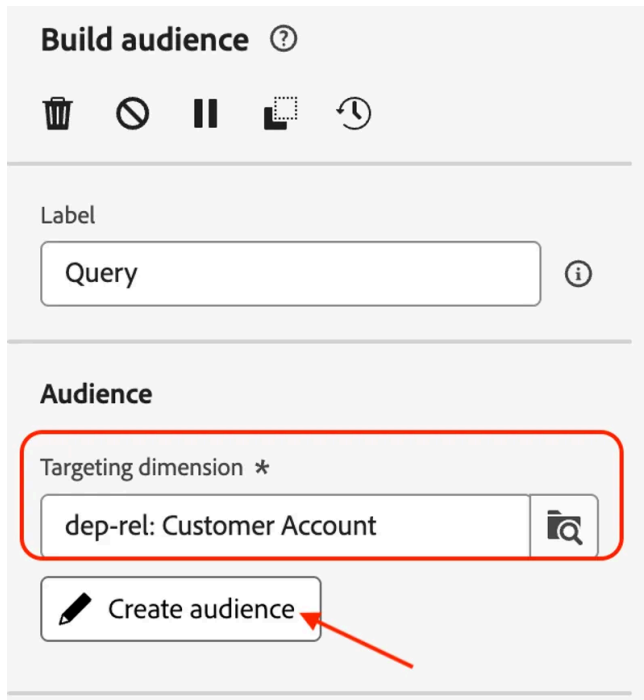
🔍 20 of 20

Schema ▾

Entity Tags
Message Feedback
Push Tracking
dep-rel: Billing Detail
dep-rel: Billing Statement
dep-rel: Customer Account ← 1
dep-rel: Customer Address

Select dep-rel: Customer Account schema

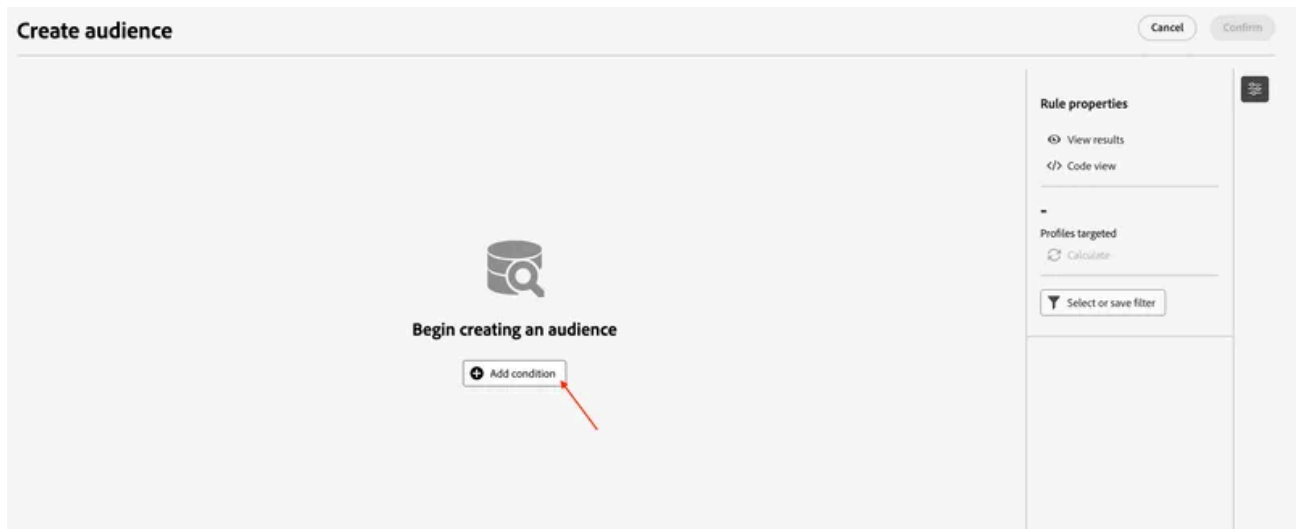
4. Once the **Targeting dimension** is configured, click on Create audience to start the process of building the audience from the relational schema



The 'Build audience' interface features a header with the title 'Build audience' and a help icon. Below the header is a toolbar with icons for deleting, disabling, pausing, cloning, and refreshing. A 'Label' section contains a text input field with the value 'Query' and an information icon. The 'Audience' section includes a 'Targeting dimension *' dropdown menu currently showing 'dep-rel: Customer Account' with a search icon. Below this is a 'Create audience' button with a pencil icon, which is highlighted by a red arrow.

Create audience

5. The Create audience details pane opens, click on **Add condition**



The 'Create audience' details pane has a title bar with 'Cancel' and 'Confirm' buttons. The main area displays a database icon and the text 'Begin creating an audience'. Below this is an 'Add condition' button with a plus icon, indicated by a red arrow. On the right side, there is a sidebar with 'Rule properties' (containing 'View results' and 'Code view' options), 'Profiles targeted' (with a 'Calculate' button), and a 'Select or save filter' button.

Add condition

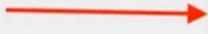
6. Scroll down and expand the `dep-rel: Plan Lookup` by clicking on the **>** next to it

Select attribute



Attributes > **dep-rel: Customer Account** 

Source 

 Plan Lookup  

 Billing Statement 

 Customer Address 

 Customer Line 

 Email Tracking 



Edit expression

Cancel

Confirm

Expand Plan Lookup

7. Select `dep-rel: Plan Name` and click on **Confirm**

Select attribute

Attributes > dep-rel: Customer Account > **Plan Lookup** ⓘ

★

Q

Last modified	ⓘ ...
Monthly Data Allowance (GB)	ⓘ ...
Monthly Line Cost	ⓘ ...
Plan ID	ⓘ ...
Plan Name ← 1	ⓘ ...
Plan Type	ⓘ ...
Unlimited Data	ⓘ ...

>>

Edit expression

Cancel Confirm 2

Select Plan Name

8. In the Custom condition panel, leave the operator as "equal to" and for Value, select Basic from the drop down.

Custom condition

Attribute

Plan Name (plan_lookup/@plan_n... ✎

Operator

equal to ▼

Value

Ultimate ▼

Ultimate ✓

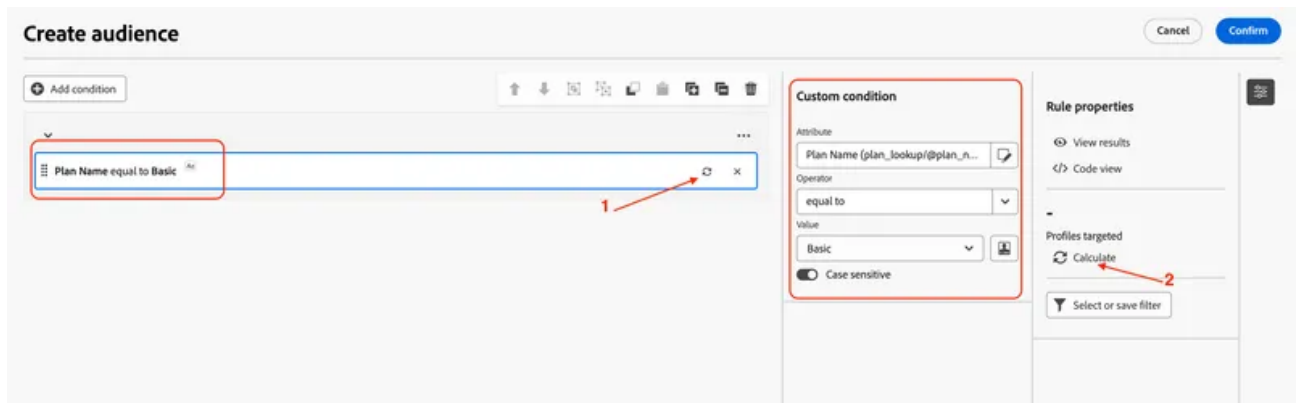
Basic ←

Pro

Plan Name equals Basic

Notice that all the distinct values available for the selected column show up in the drop down, making it easy to create the custom conditions.

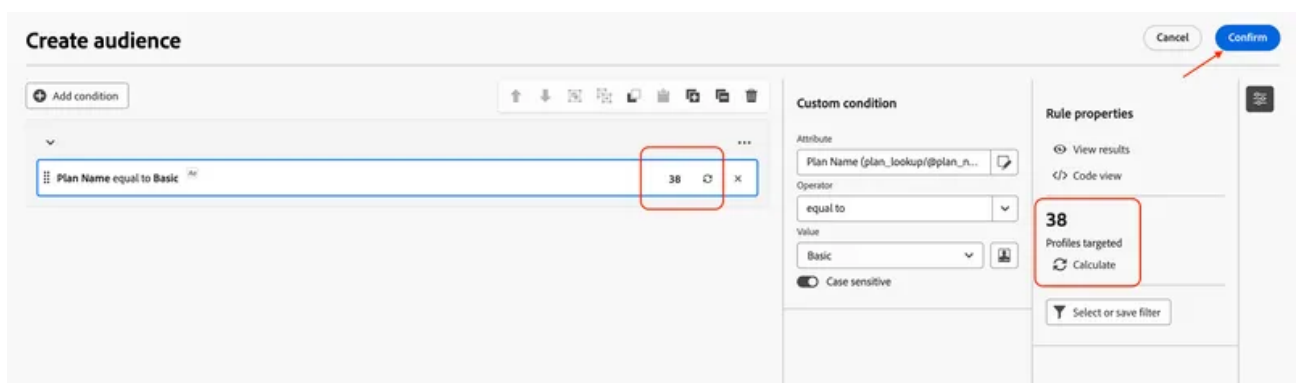
9. With the Custom condition configure, click on the Refresh icon to calculate and view the count. There are two locations to help with calculating the results



Calculate expected row counts

The Refresh operation evaluates the condition against the relational data and displays the expected results. This operation typically just takes a few seconds and is extremely useful for fine-tuning the criteria and ensuring it meets expectations.

10. The counts (**38**) indicate the number of rows in the relational store that match the specified condition. Click on **Confirm** to exit the **Create audience** pane



Confirm

There are options under the Rule properties section to get more details. Click on **View results** to see the actual results returned. Use the **Code view** option to see the query being executed.

Recap

You have now seen how easy use the Build Audience activity in the campaign by choosing the right Target dimension from the relational schema. You then added a condition to refine the audience building criteria and used the refresh option to check the expected number of rows.

You can read more [here](#) if you are interested.

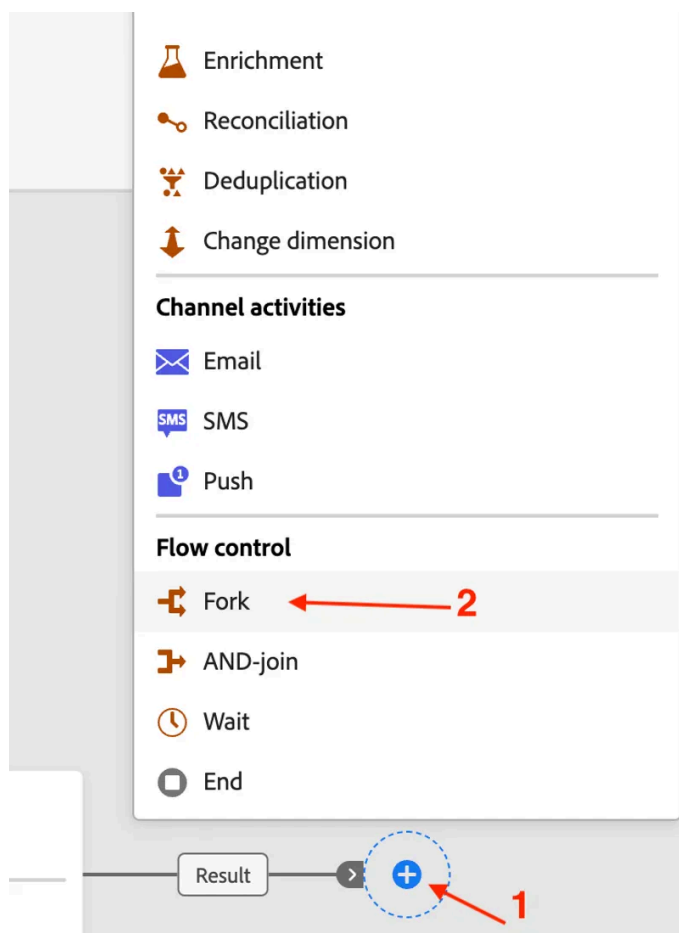
4.1.3. Add Fork Activity

Objective

In the next set of steps you will add the Fork activity to the campaign and create identical branches of the data.

Fork activity

The canvas with the configured **Build audience** is presented. Click on the **+** at the end of the flow and add a **Fork** activity from the Flow control section



Add a Fork flow control

By default a fork activity will always create two branches

Recap

You have now seen how easy use the Fork activity to the campaign canvas to create identical branches of the same data flowing in. The branches of the Fork activity will be used in the next step.

You can read more [here](#) if you are interested.

4.1.4. Add Email Activities

Objective

In the next set of steps, you will build on the campaign to add two Email activities to the two Fork activity branches. You will configure the two Email activities to use the Email channels, created previously. Finally you will also add basic Email setup (subject and body) to each of these Email activity.

Before you continue you must ensure both of your email channel configurations are showing active in their status.

Channel configurations



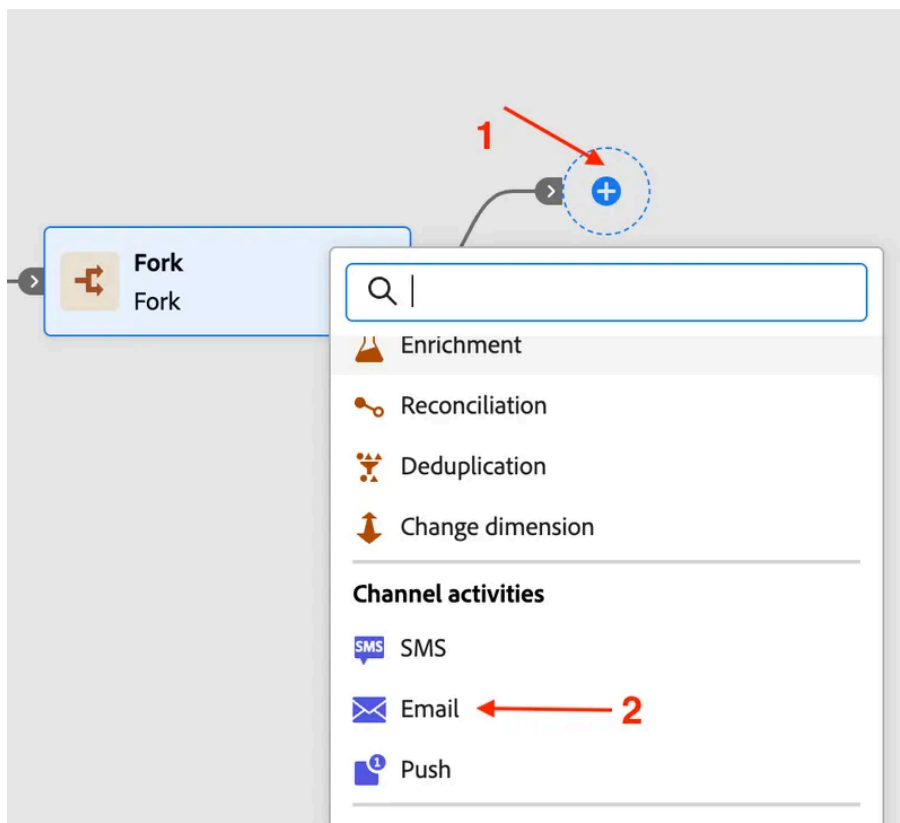
2 of 2

Configuration name		Channels	Status
Relational-Email	...	Email	● Active
Profile-Email	...	Email	● Active

Email channel configurations

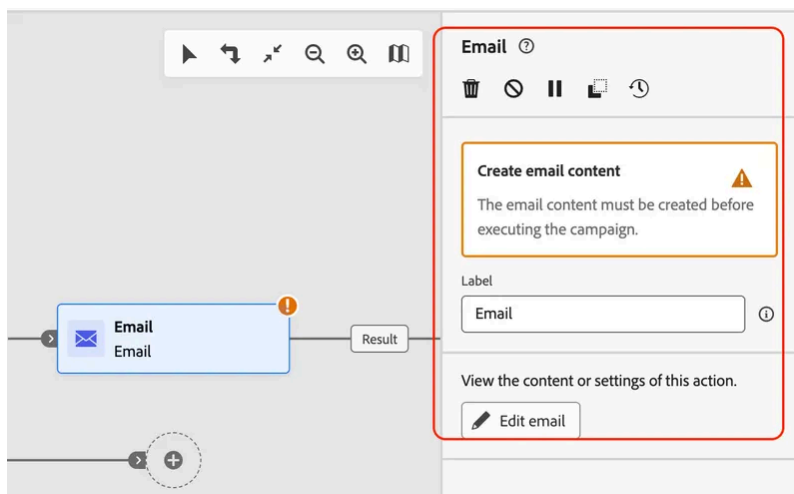
Add Top Branch Email Activity

1. Click on the + of the top flow and select **Email** from the **Channel activities**



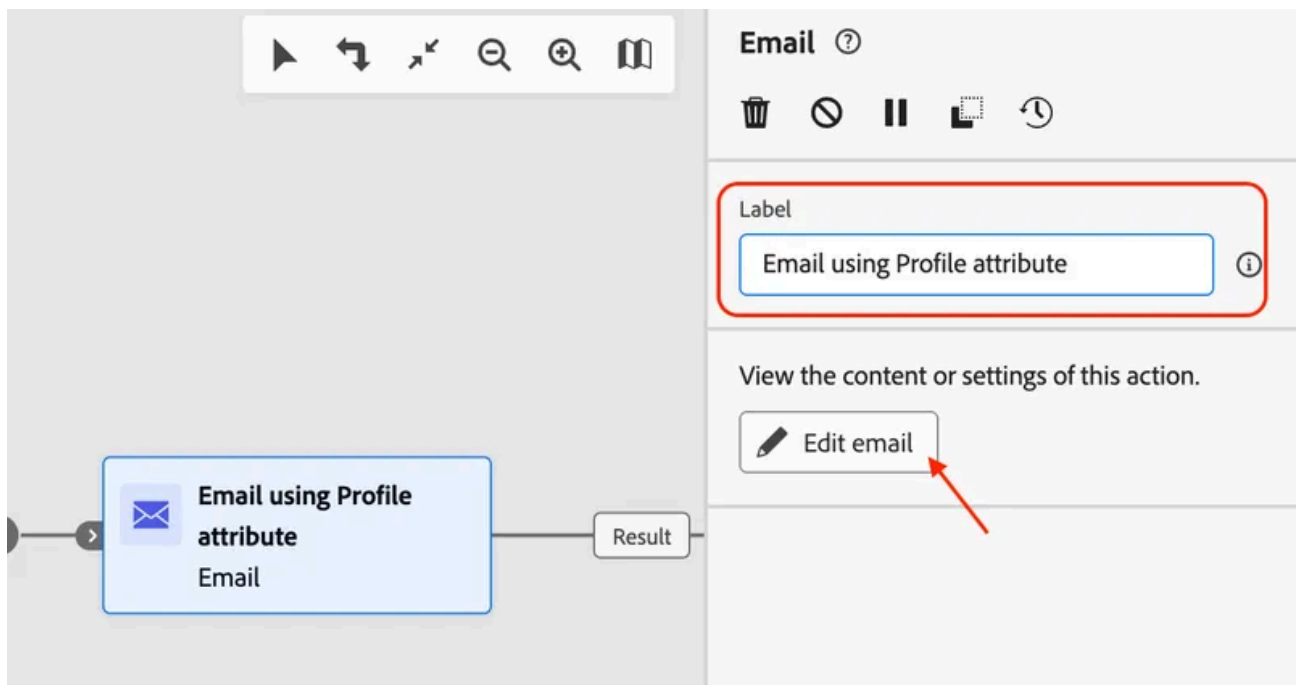
Add Email activity

The **Email** details pane opens



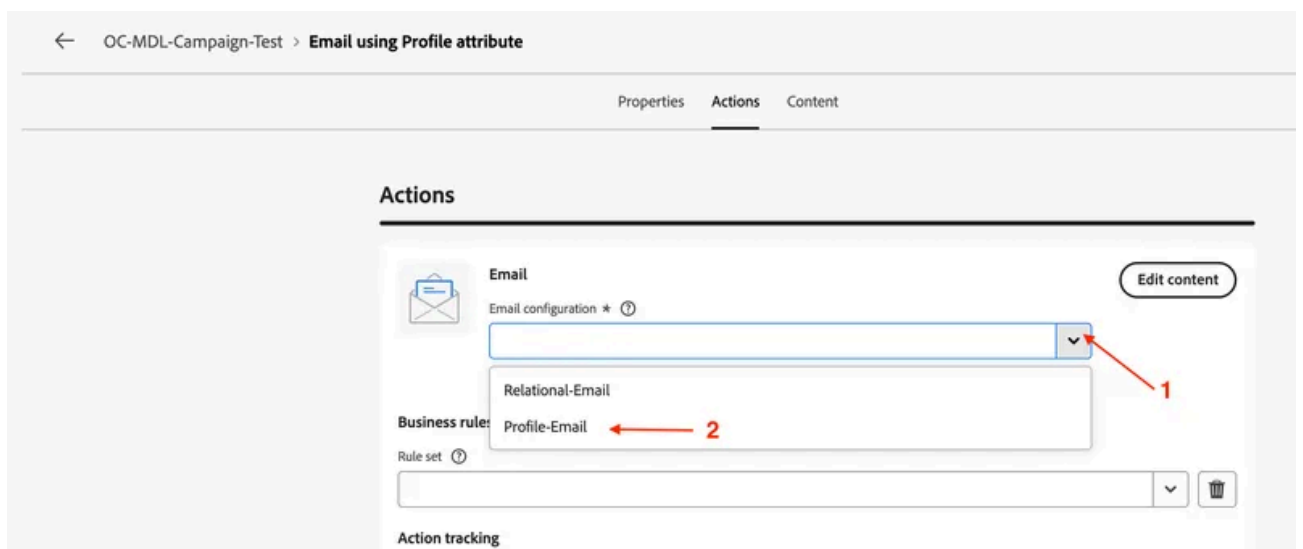
Edit Email activity

2. Rename the label to **Email using Profile attribute** for the **Email** activity and click on **Edit email**. Note that the email body creation is only for testing purposes



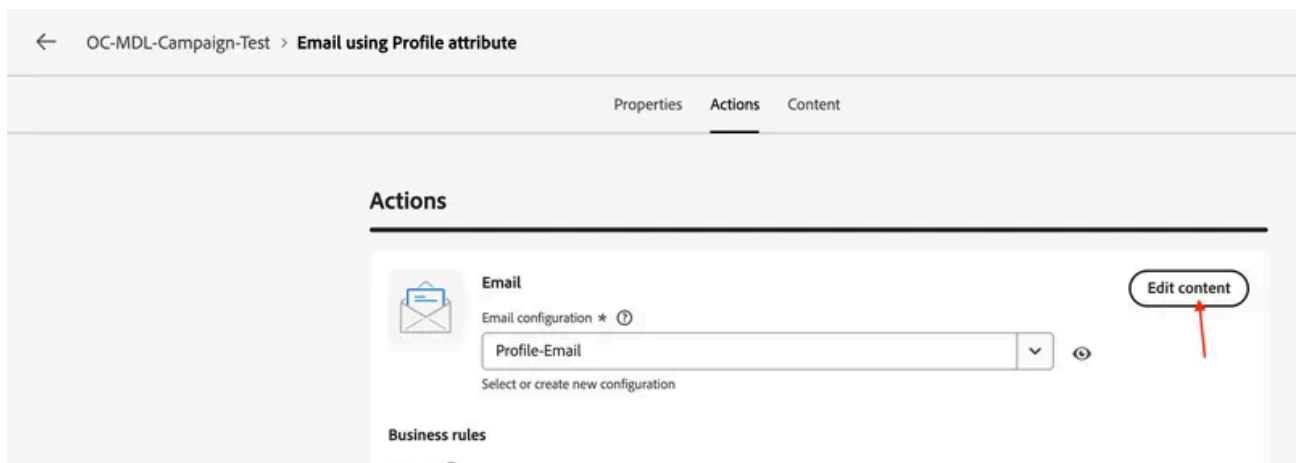
Edit Email

3. Select the **Actions** tab and from the drop down select **Profile-Email** channel config



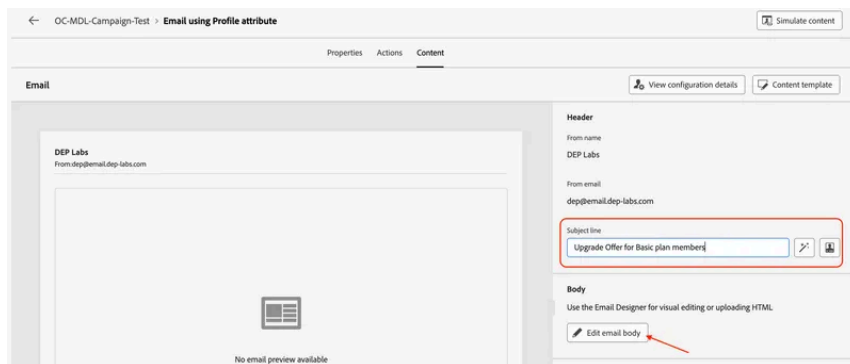
Configure Email Actions

4. Next, click on **Edit content** to add some test content



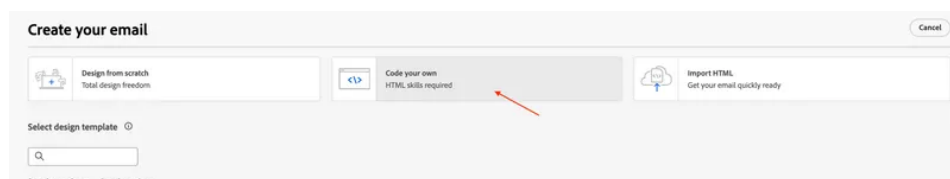
Edit content

5. Provide a **Subject Line** ("Upgrade Offer for Basic plan members") and click on the **Edit email body** button



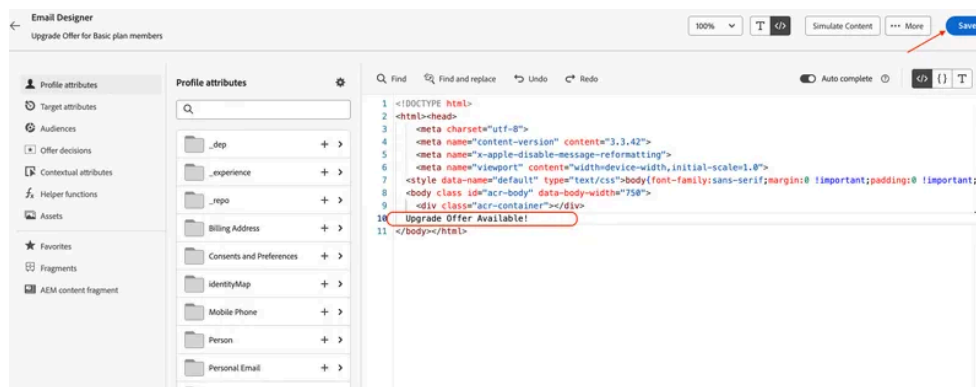
Add subject line and edit email body

6. There are many options, for this test, choose **Code your own** HTML option



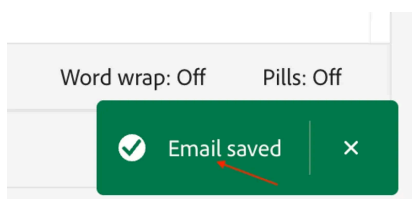
Code your own

7. In the **Email Designer**, insert a test line "Upgrade Offer Available!" just before the `</body></html>` tags as shown and click on **Save**



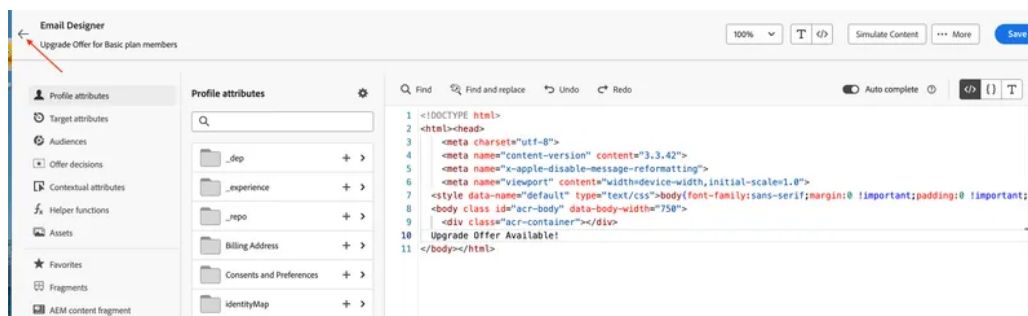
Email Designer

8. Wait for the confirmation message to appear at the bottom-right corner



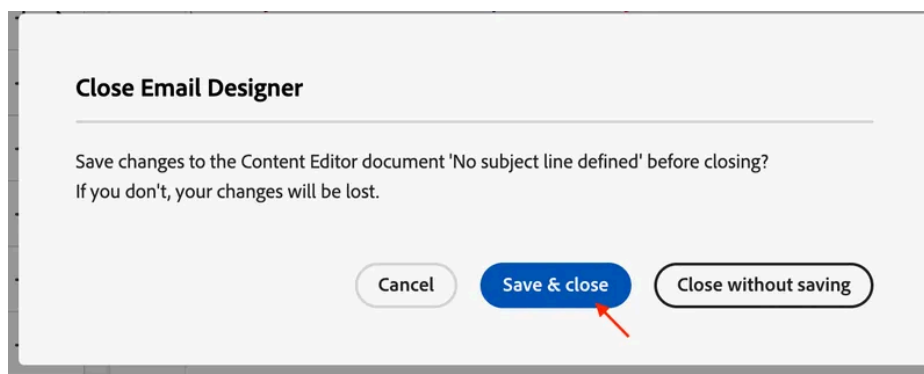
Confirmation

9. Click on the **left arrow** next to the **Email Designer** to exit



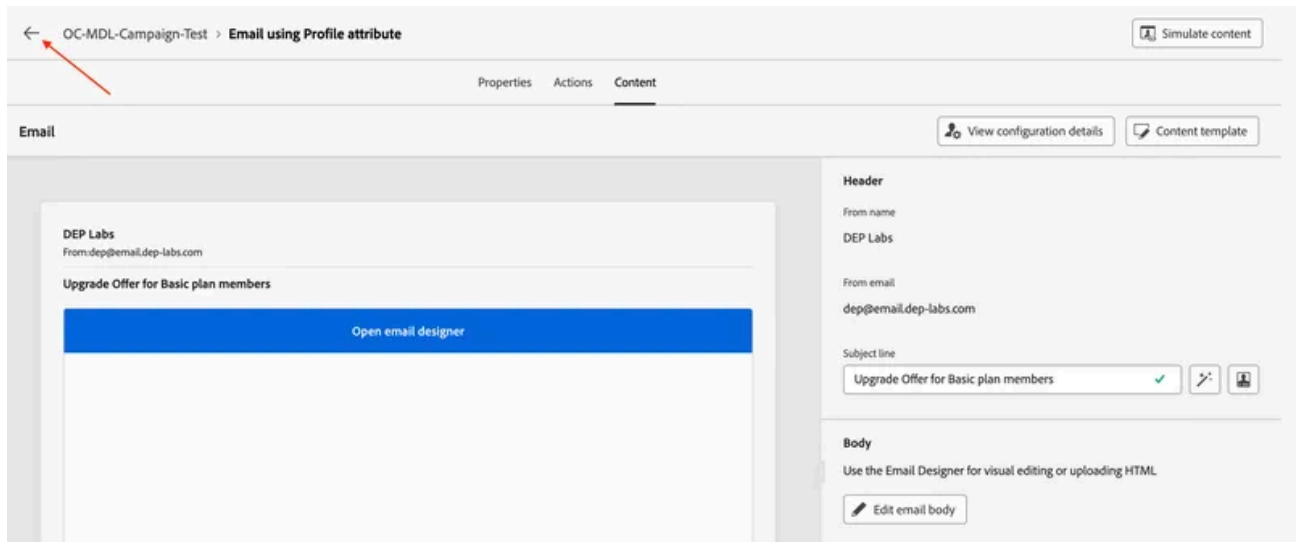
Exit Email Designer

10. A confirmation dialog pops up, click on the **Save & close** button



Save & close

11. Review the Email properties and actions including the text added to the Email body.
Click on the **left arrow** to navigate back to the campaign canvas

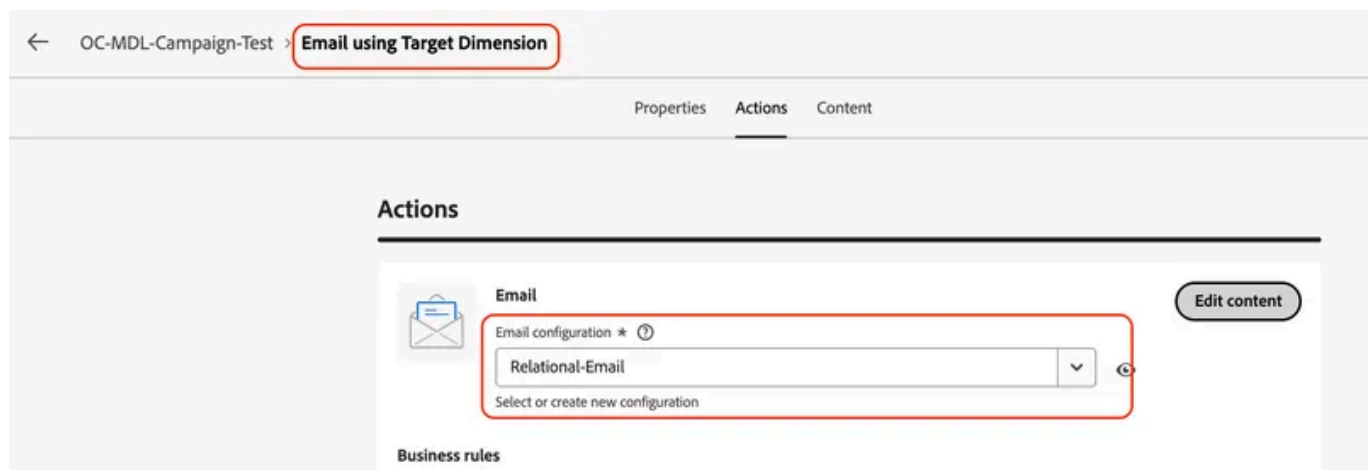


Back to Campaign canvas

Add Bottom Branch Email Activity

Back in the campaign canvas, click on the **+** of the bottom flow and select **Email** from the **Channel activities**. Follow the same steps as above (Steps 2 to 11) except for the following:

- Rename the label to **Email using Target Dimension** for the **Email** activity
- In the Email settings, choose the **Relational-Email** Email channel config



Add the second Email activity

Recap

You have now seen how to configure the Email activities with the Email channels. Each activity was then configured with a very basic Email subject and body. The entire

campaign will be tested next.

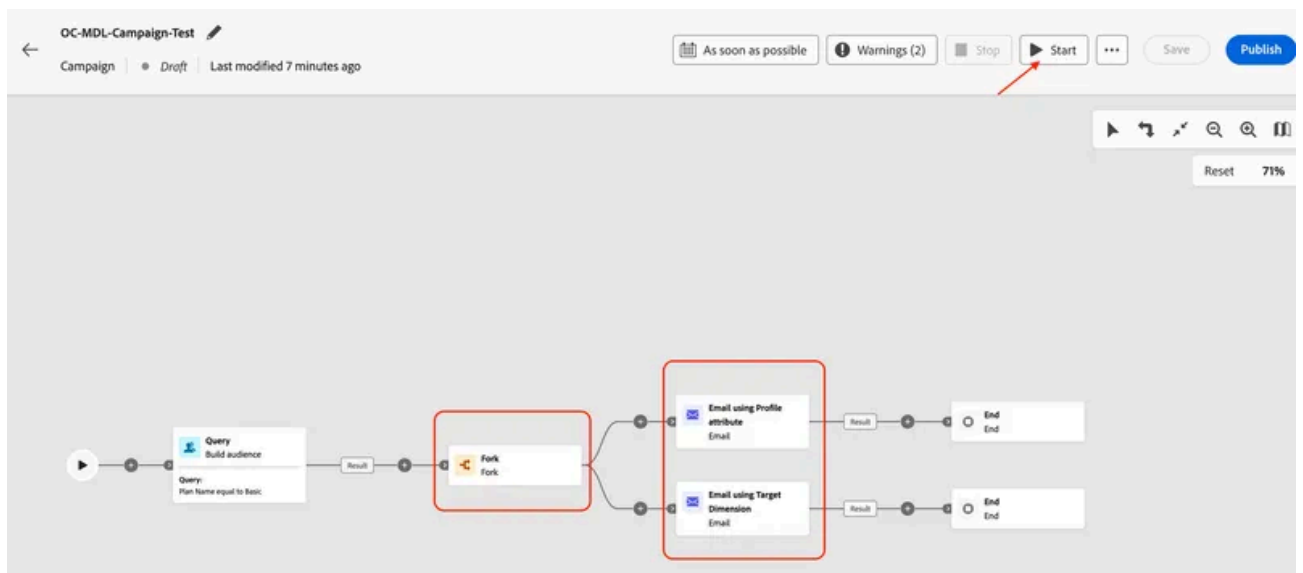
4.1.5. Test the Campaign

Objective

In the next set of steps you will run the campaign in test mode to confirm the functioning as expected before publishing the campaign. In this case, test mode does not actually send emails, but it helps verify the entire flow and identify issues early.

Start the Workflow

1. Once the two Email flows have been configured, the Campaign should look like the following. Click on **Start** button to run the campaign in **Test mode**



Start the test mode

As mentioned in the previous lab, Test mode enables to validate the campaign execution and the outcomes of the various activities. Each activity is executed sequentially until the end of the flow is reached.

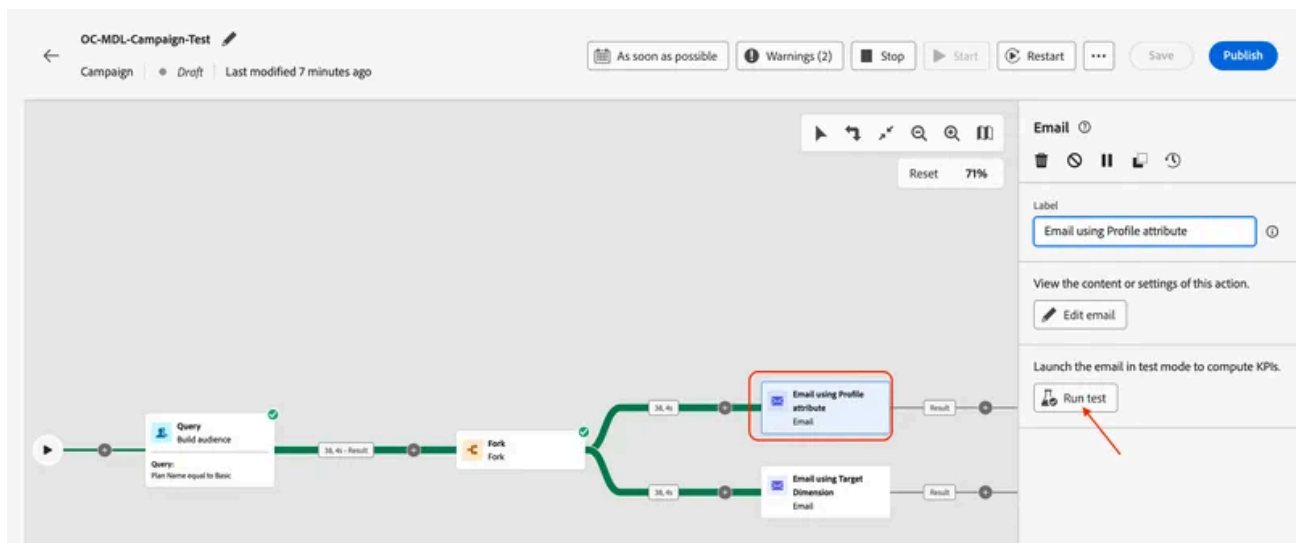
2. The test execution of all the campaign activities starts, verify the results



Test mode

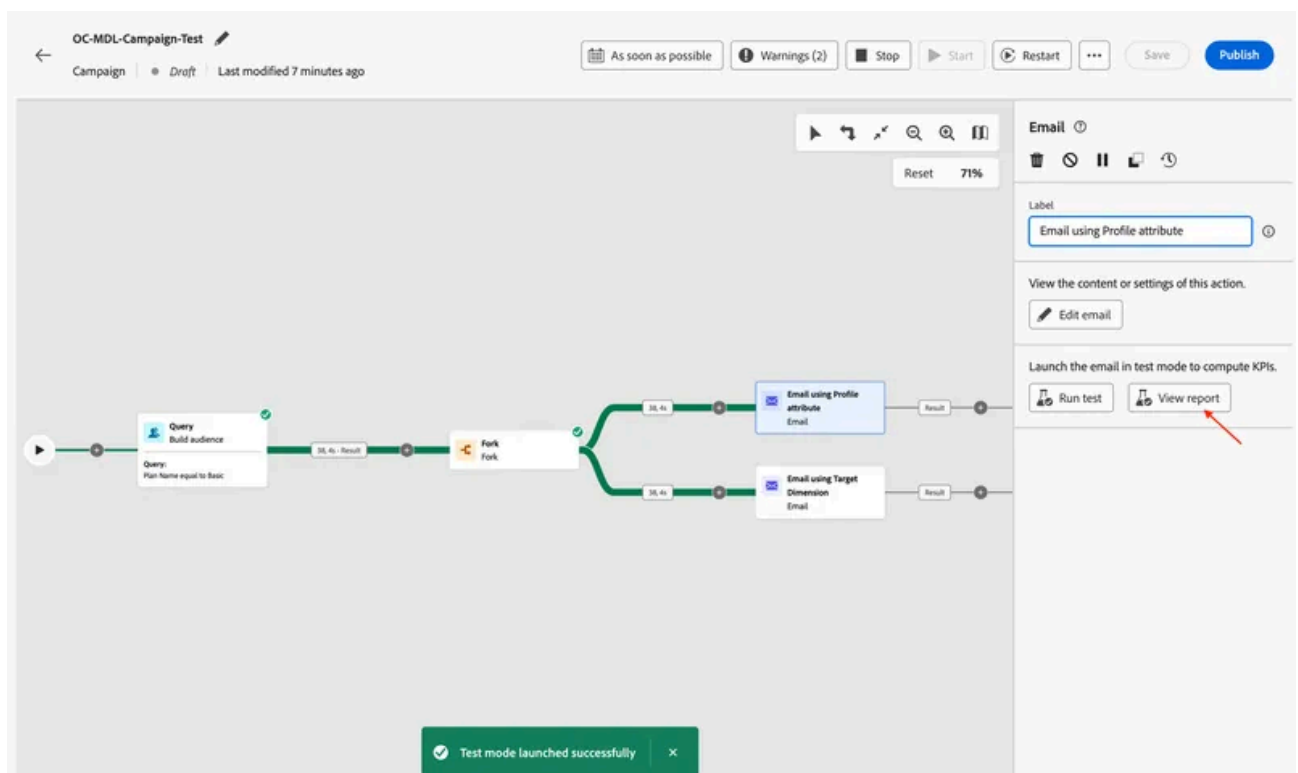
Email Report #1

1. To test the Email delivery, click on the **Email using Profile attribute** activity and in the right hand pane, click on **Run test**



Run test for Email Report #1

2. Wait for the confirmation message and then click on **View report** to see details of the Email test



View Report

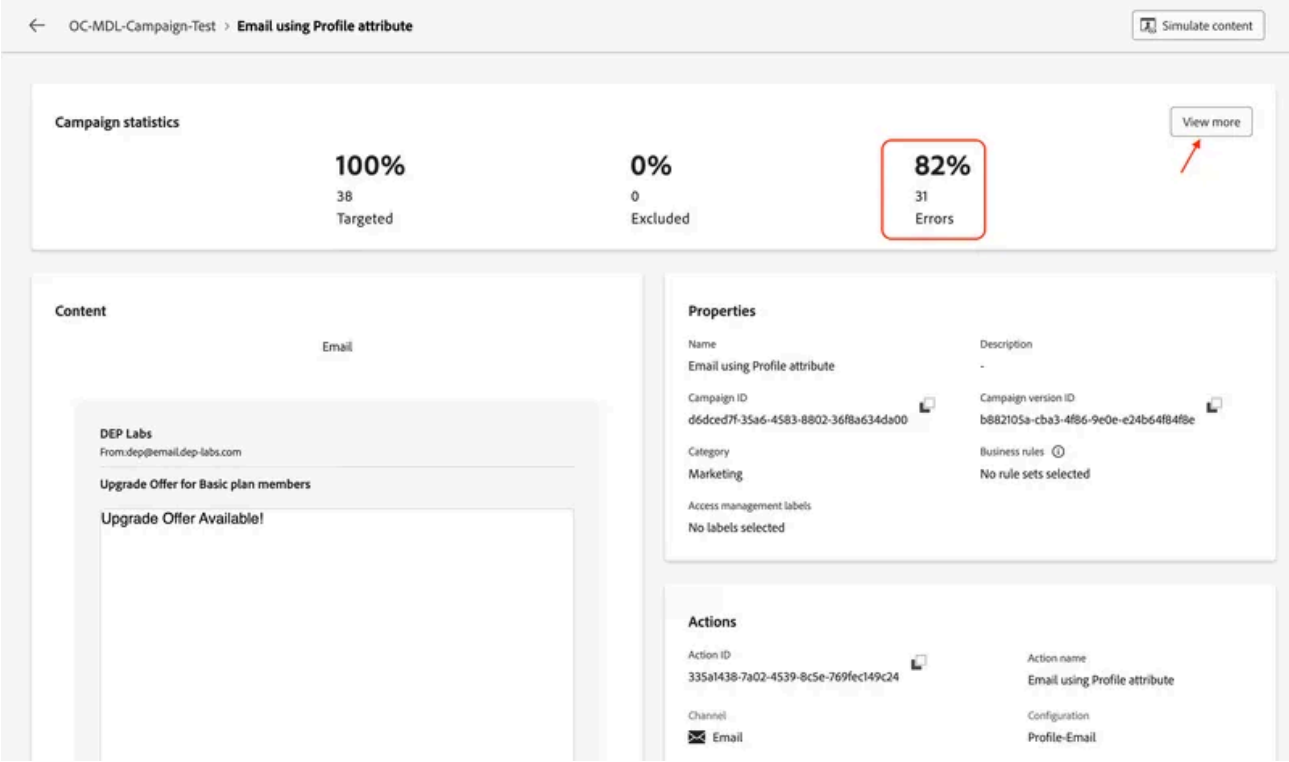
- The Email report page is presented with Campaign statistics and the execution status. The Email test is a verification of the activity to ensure there are no errors and does not send emails. It typically takes about ~5 minutes to complete.

The screenshot shows the 'OC-MDL-Campaign-Test > Email using Profile attribute' page. At the top, there's a 'Simulate content' button. The 'Campaign statistics' section displays a message: 'Execution is still in progress, please check back later.' The 'Content' section shows an email template with the subject 'Upgrade Offer for Basic plan members' and the body 'Upgrade Offer Available!'. The 'Properties' section lists details: Name (Email using Profile attribute), Description (+), Campaign ID (d6dced7f-35a6-4583-8802-36f8a634da00), Campaign version ID (b882105a-cba3-4f86-9e0e-e24b64f84f8e), Category (Marketing), Business rules (No rule sets selected), Access management labels (No labels selected), and Action tracking. The 'Actions' section lists: Action ID (335a1438-7a02-4539-8c5e-769fec149c24), Action name (Email using Profile attribute), Channel (Email), and Configuration (Profile-Email).

Campaign statistics

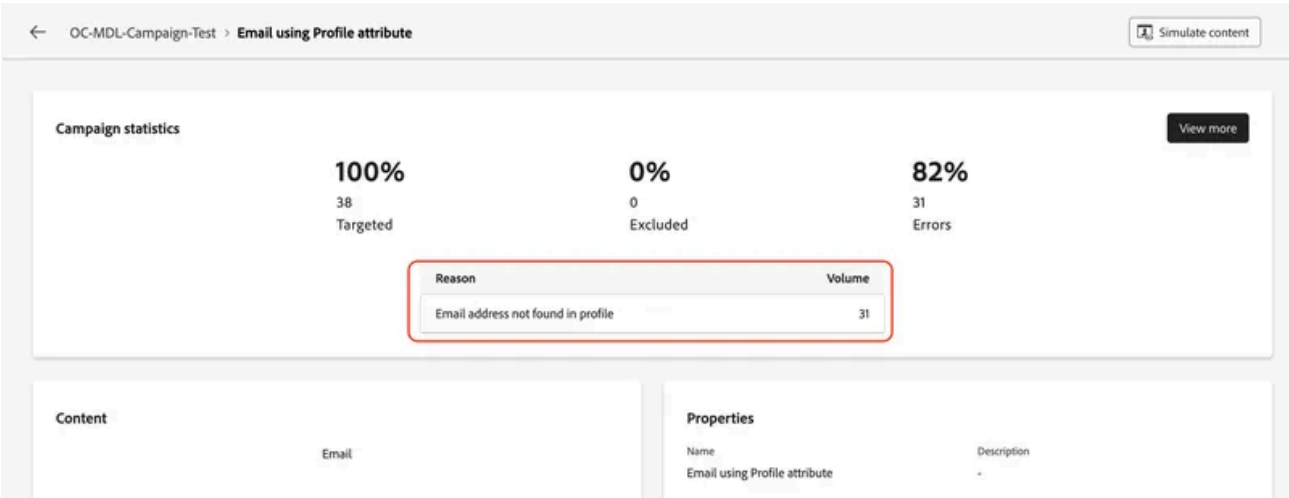
You may need to refresh the page a few times to see the final test result.

4. Once the Email test is complete, the results are presented. There will be some percentage of errors, click on **View more** to know the reason.



Error rate

5. The reason states "Email address not found in profile"



Reason

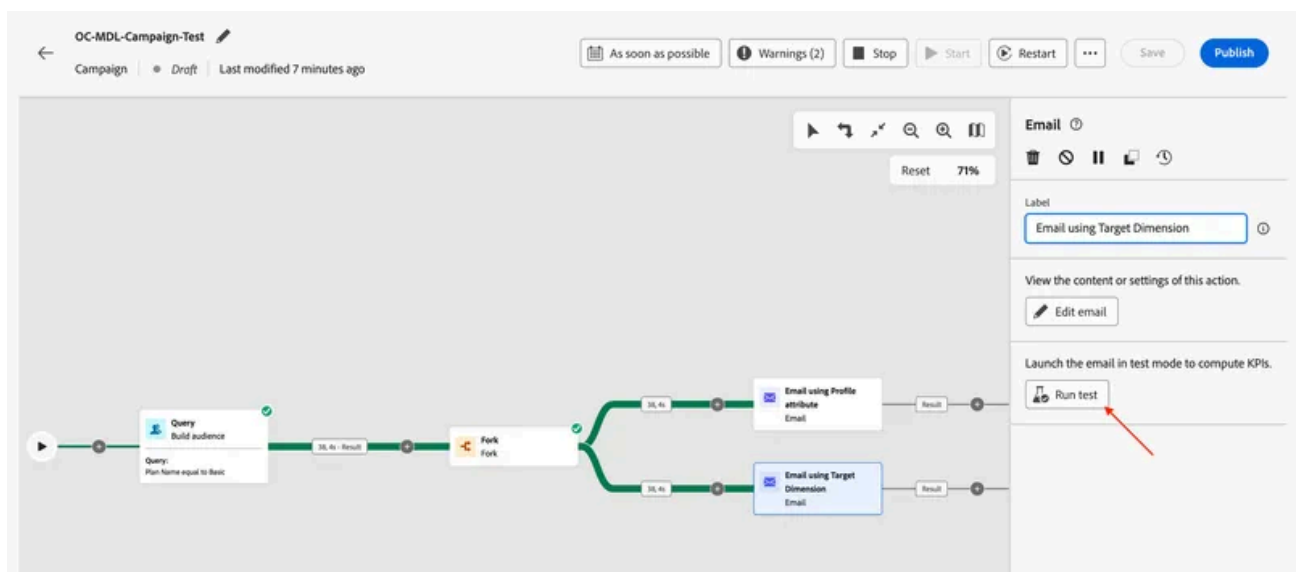
Since the **Delivery address** configured for the Email activity, **Email using Profile attribute**, was configured to use the Profile attribute `personalEmail.address`, it created a dependency on the **AEP Profile**.

Of the **38** qualified customer IDs from the relational schema, the system could find only **7** corresponding AEP Profiles. For the remaining **31** of them, AEP Profiles did not exist which resulted in the 'Email address not found in profile' error message.

It is important to remember that data in the datalake and the relational store are kept **consistent** when using AEP Profile attributes in orchestrated campaigns.

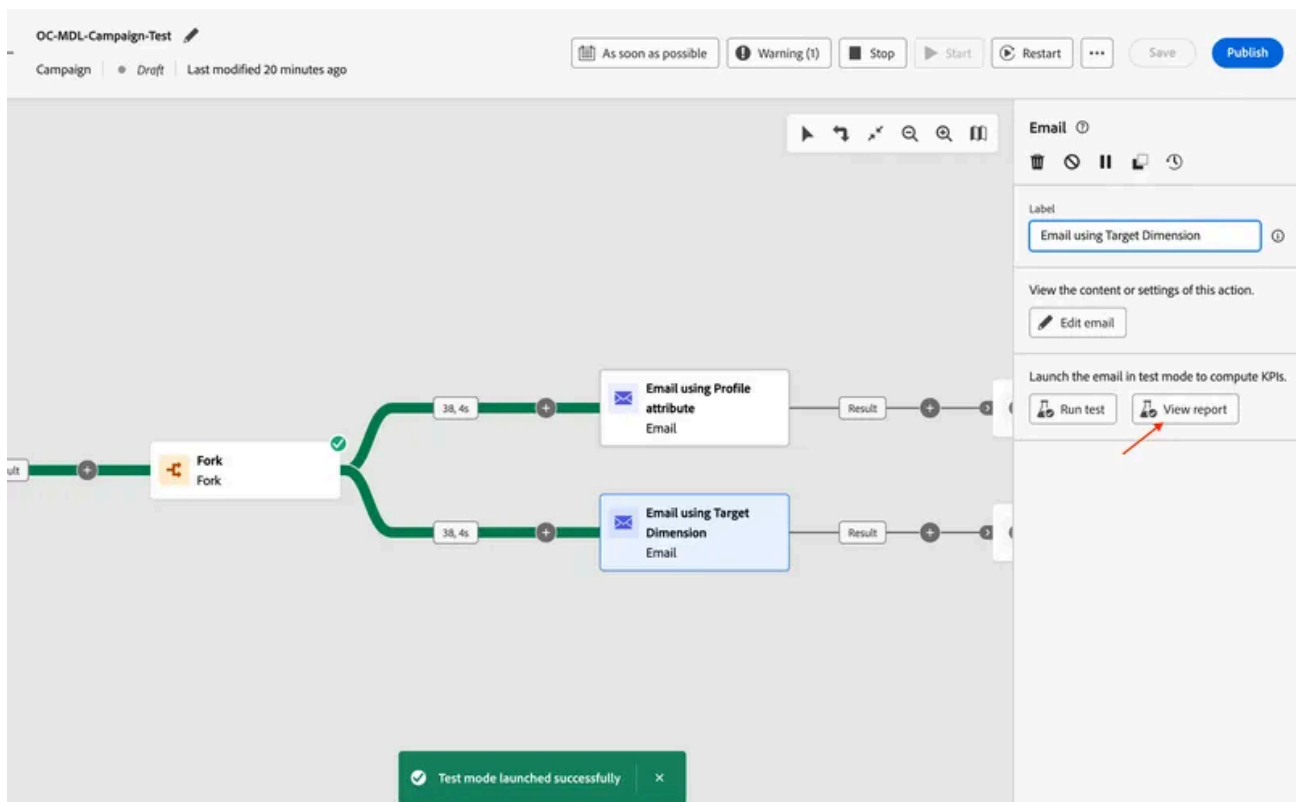
Email Report #2

1. Repeat the same process for the **Email using Target Dimension** activity



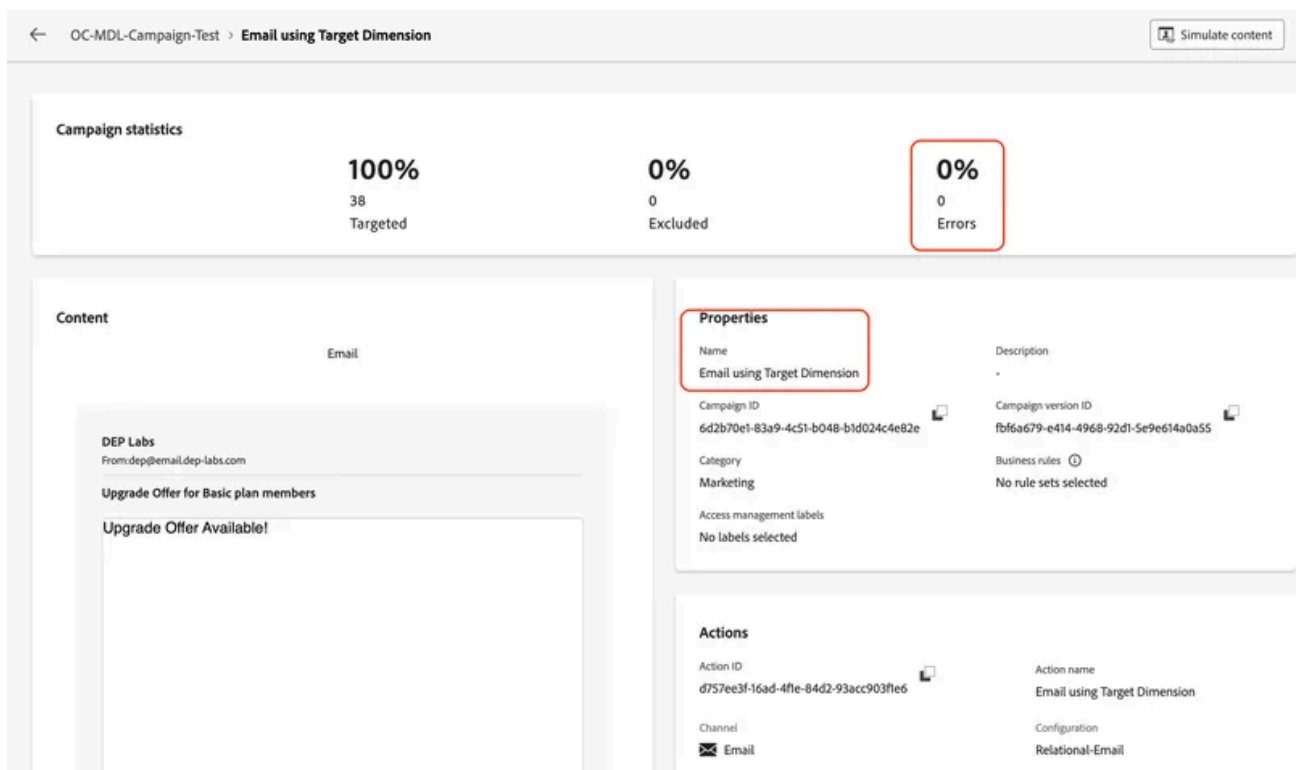
Run test for Email Report #2

2. Wait for the confirmation message and then click on **View report** to see details of the Email test



View report

3. Once the Email test is complete, the results are presented. In this case, there will be no errors



Campaign statistics

Since the **Delivery address** for the Email activity **Email using Target Dimension**, was configured to use the `dep_rel_customer_account.email` , from the Relational schema, there was no dependency on AEP Profiles or its attributes.

All **38** qualified customer IDs were found to have corresponding emails in the Relational store and could be targeted successfully without any errors.

Stop the Workflow

Click on the **Stop** button to stop the **Test mode** for the campaign

Both email channel configurations were tested within the same campaign, and differences were observed between using an AEP Profile attribute and using the Target Dimension in the Email channel configuration.

Congratulations, this concludes the Message Delivery lab.

Recap

You have now seen how to test the campaign created to understand the flow and behavior. Here the nuances of using the different settings for Email channel configuration was well understood during the test flow execution.

You can read more the campaign test mode [here](#), if you are interested.

4.1.6. Summary

Through this lab you did the following activities:

- Built an Orchestrated Campaign
- Constructed an audience for Basic Plan members using the Build Audience activity
- Fork the audience to create two branches and used the Email channels - `Profile-Email` and `Relational-Email` respectively to send messages
- Tested the campaign to learn the difference in behavior between the two Email channels configured

IF YOU ARE READING THIS IT MEANS YOU ARE AT THE END OF THE LAB.

DO NOT PROCEED, DO NOT PASS GO, DO NOT COLLECT \$200

4.2. Flagship Phone Launch

Pre-Requisites

The below labs must have been completed before starting this lab

- **Data Stores -- Relational Store in Action → [Profile Target Dimension](#)**
- **Data Stores -- Configure Email Channels → [Configure for Relational](#)**
(this setup step takes up to 3hrs to complete)

If you have not completed these labs please do so now before continuing.

Learning Objectives

- Build an Orchestrated Campaign using a variety of workflow activities
- Construct an audience using a Build Audience activity
- Understand how to setup an SMS channel
- Save an audience to the audience portal
- Target both the customer account and individual lines with email and sms messages

Use Case Description

Immediately following the launch of a manufactures' latest flagship device, send a targeted message to account holders and line users with older models -- inviting them to upgrade and experience the future of mobile.

Key callouts:

- Save the audience of all customer lines to the Audience Portal
- Target individual lines and account holders with a message (you'll use SMS)

This scenario simulates a **telecom contract upgrade campaign**, where secondary (dependent) lines receive targeted upgrade messaging.

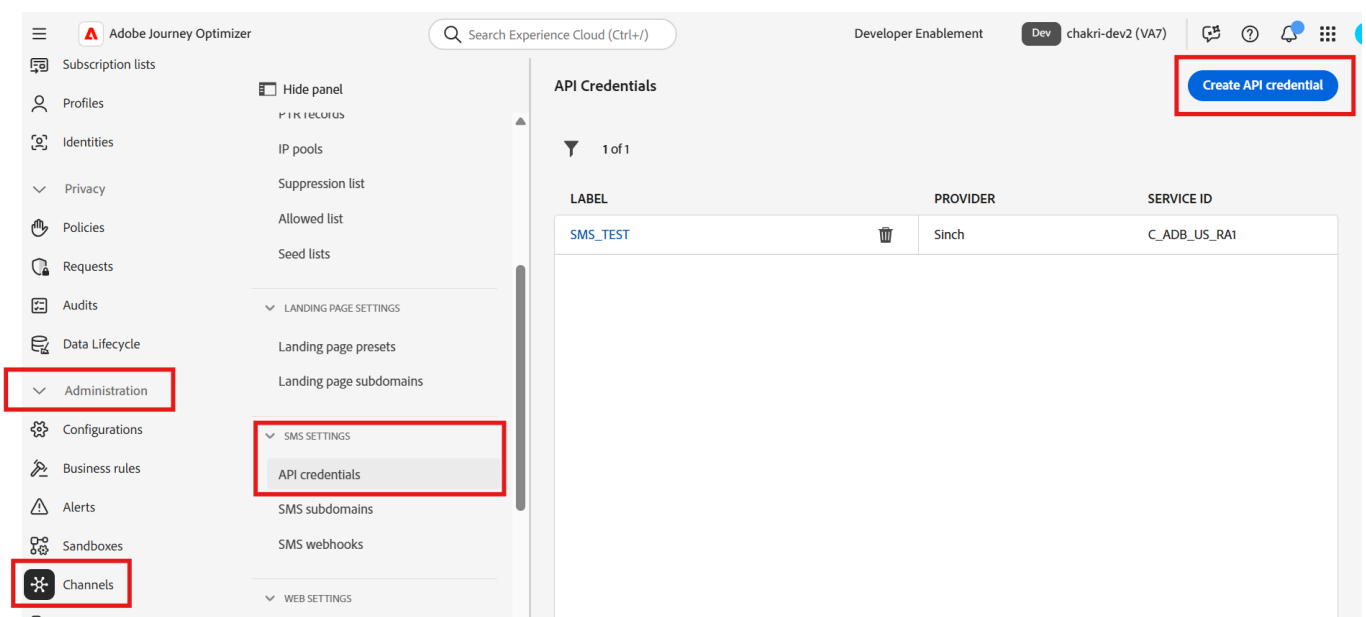
4.2.1. Configure SMS channel

Objective

In the next step of steps you will configuration the SMS channel. This is required so that you can send messages to individual line holders later on when you are building your campaign.

Navigate to Channels

1. In Adobe Journey Optimizer, go to the **Administration** → **Channels** menu.
2. Select **SMS Settings** → **API credentials**.
3. Click **Create API credential**.



Navigate to SMS Settings

Define the SMS API Credentials

You will start by creating the API connector that AJO will use to send outbound SMS requests.

1. Under SMS Vendor choose **Twilio**.
2. Enter the following API credential details from the **Sandbox Assignment.pdf** file that was emailed to you:
 - **Name:** DEP SMS
 - **Account SID:** value from the PDF
 - **Auth Token:** value from the PDF
3. Click **Submit** to register the API credential

* Required

API credential details ?

Adobe Journey Optimizer sends Mobile messages through SMS service providers. Select your provider, and fill in your API credentials.

SMS Vendor *

Twilio

Name *

DEP SMS

Account SID *

Message SID

Auth Token *

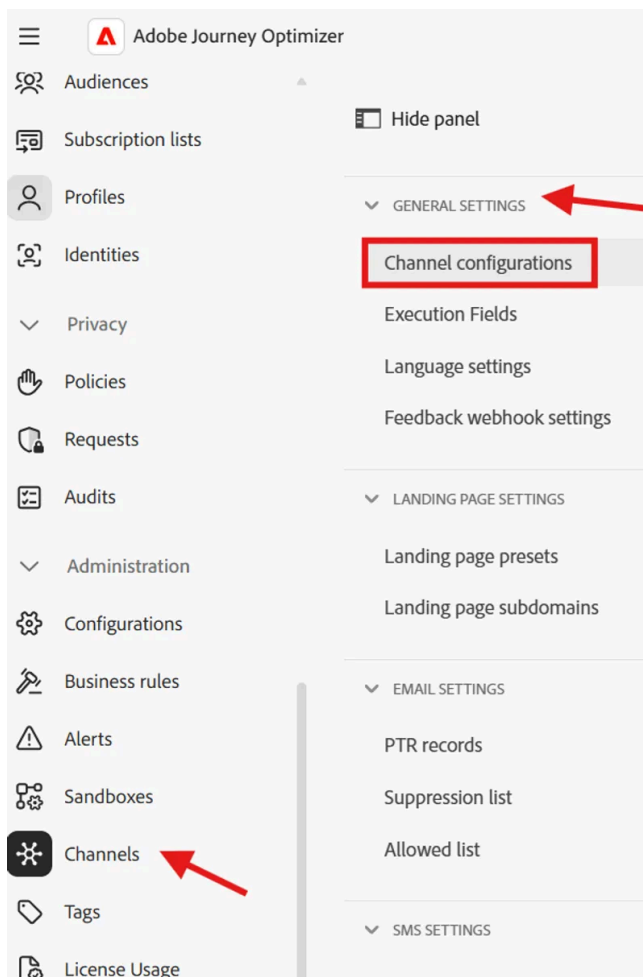
Restricted Account SID

Enter SMS API credentials

Create SMS Channel Configuration

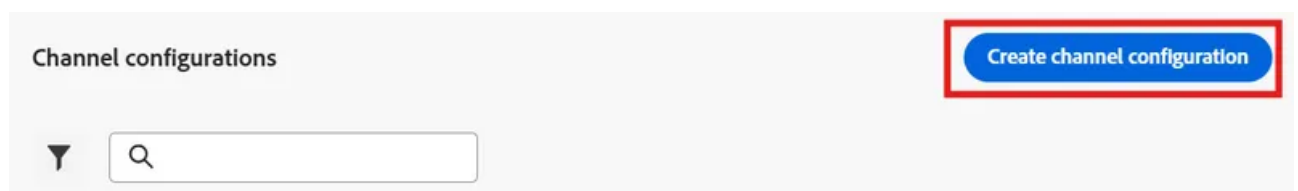
Now you will map this API credential to a channel configuration that journeys and campaigns can use.

1. Navigate to **Channels** → **General Settings** → **Channel configurations**.



Navigate to channel configurations

2. Click **Create channel configuration**.



Create a new channel configuration

3. Fill in SMS Channel Configuration Settings with the following values:

- **Name:** Relational-SMS-Multi-Entity
- **Channel:** Mobile Message

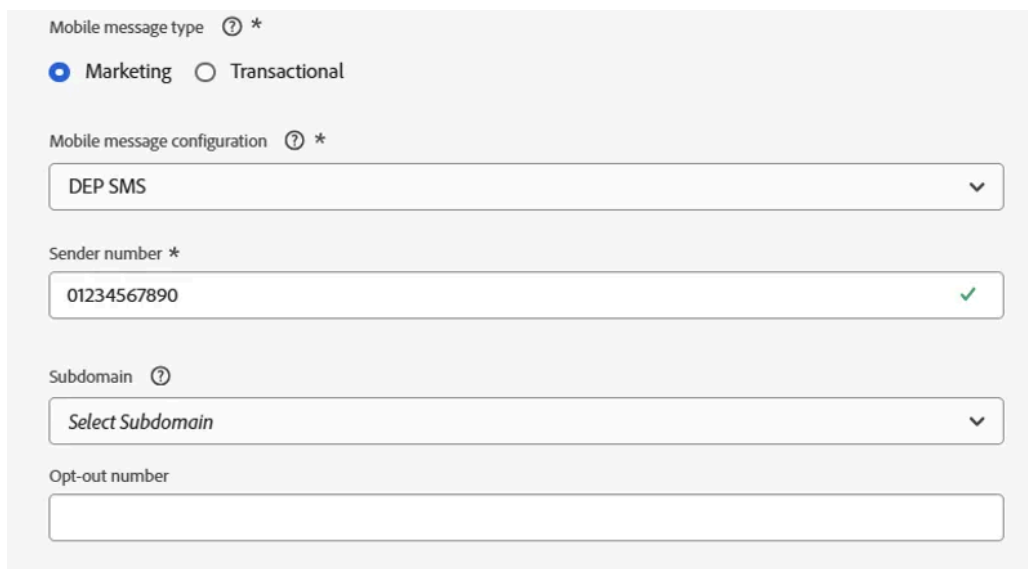
If you get an error of user does not have permissions ignore it and continue on with your day

- **Marketing Action:** SMS Targeting

SMS Settings

On selecting Channel as Mobile Message, a new section SMS settings shows up. Fill it in with the following details:

- **Mobile message type:** Marketing
- **Mobile message configuration:** DEP SMS
- **Sender number:** 01234567890
- **Subdomain:** leave blank
- **Opt-out number:** leave blank



The screenshot shows a form titled 'Mobile message type' with a help icon and an asterisk. It has two radio buttons: 'Marketing' (selected) and 'Transactional'. Below this is a section titled 'Mobile message configuration' with a help icon and an asterisk, containing a dropdown menu with 'DEP SMS' selected. The next section is 'Sender number' with an asterisk, containing a text input field with '01234567890' and a green checkmark. Below that is a section titled 'Subdomain' with a help icon, containing a dropdown menu with 'Select Subdomain' selected. The final section is 'Opt-out number', containing an empty text input field.

Enter SMS sender number

Execution details

1. Under Execution details, click the tab **Orchestrated campaign**

Execution details

Journey & Action **Orchestrated campaign**

2. Ensure the **Enabled** checkbox is checked

Execution details

Journey & Action **Orchestrated campaign**

☒ **Enabled**

Enabled orchestrated campaigns

3. Next under the sub-section **Execution dimension** ensure the following are setup as such:

- **Deliver on message per:** Target + Secondary Dimension
- **Profile Target Dimension:** dep-rel: Customer Account - customer_id
- **Secondary Dimension:** Customer Line

Execution details

Journey & Action **Orchestrated campaign**

☒ Enabled

Execution dimension

Deliver one message per: *

☐ Target Dimension ☒ Target + Secondary Dimension

Profile Target Dimension *

Select Target Dimension 

dep-rel: Customer Account - customer_id

Select Secondary Dimension

Setup the execution dimension

Execution dimension

Deliver one message per: *

☐ Target Dimension ☒ Target + Secondary Dimension

Profile Target Dimension *

dep-rel: Customer Account - customer_id

Secondary Dimension *

Select Secondary Dimension 

Plan Lookup

Order

Order (email)

Customer Line

Customer Address

Billing Statement

Secondary Dimension

This is telling Orchestrated Campaigns that when it sends messages it should deliver one message per record that matches to the Profile Target Dimension.

4. Under Execution Address heading ensure you select the radio button for **Secondary Dimension** and then click the edit button on the **SMS Execution Field**

Execution Address

Source

☐ Profile ☐ Target Dimension ☒ Secondary Dimension

SMS Execution Field

[Edit Icon]

Choose execution address

5. On the pop-up, click into the schema **dep-rel: Customer Line** and select **Mobile Phone**.

Select SMS Execution Field

Target Dimension: **dep-rel: Customer Line**

Title	Description	Referenced from	Attributes
☐ Active Line	-	-	target.dep_rel_customer_line.active
☐ Customer ID	-	-	target.dep_rel_customer_line.custor
☐ Customer Line ID	-	-	target.dep_rel_customer_line.custor
☐ Last Modified	-	-	target.dep_rel_customer_line.last_n
☒ Mobile Phone	-	-	target.dep_rel_customer_line.mobili
☐ Primary Line	-	-	target.dep_rel_customer_line.prima
☐ Product ID	-	-	target.dep_rel_customer_line.produ
☐ SMS Opt-in	-	-	target.dep_rel_customer_line.sms_c

Mobile Phone field

6. Confirm the final Execution details section matches below

Execution details

Journey & Action **Orchestrated campaign**

☒ Enabled

Execution dimension

Deliver one message per: *

☐ Target Dimension ☒ Target + Secondary Dimension

Profile Target Dimension *

dep-rel: Customer Account - customer_id

Secondary Dimension *

Customer Line

Execution Address

Source

☐ Profile ☐ Target Dimension ☒ Secondary Dimension

SMS Execution Field

dep_rel_customer_line.mobile_phone



Final execution details config

Submit & Review

1. You can click the **Submit** button to complete the configuration and should see a success message appear

✓ Channel configuration Relational-SMS-Multi-Entity is submitted and processed successfully for use.



Success message

2. On the channel configurations inventory page ensure the status shows as **Active** before moving on

Channel configurations



3 of 3

Configuration name		Channels	Status
Relational-SMS-Multi-Entity	...	SMS	● Active

Active SMS Channel configuration

Wait until the status turns **Active** otherwise future lab steps will fail miserably for you

3. When the status turns Active you are complete!

☑ Booyah! Your SMS channel is now live and ready for action!

Recap

You have now seen how to successfully configure a SMS channel. Note this is an API-based SMS so depending on your provider they may use alternative methods for authentication.

You can read more [here](#) if you are interested.

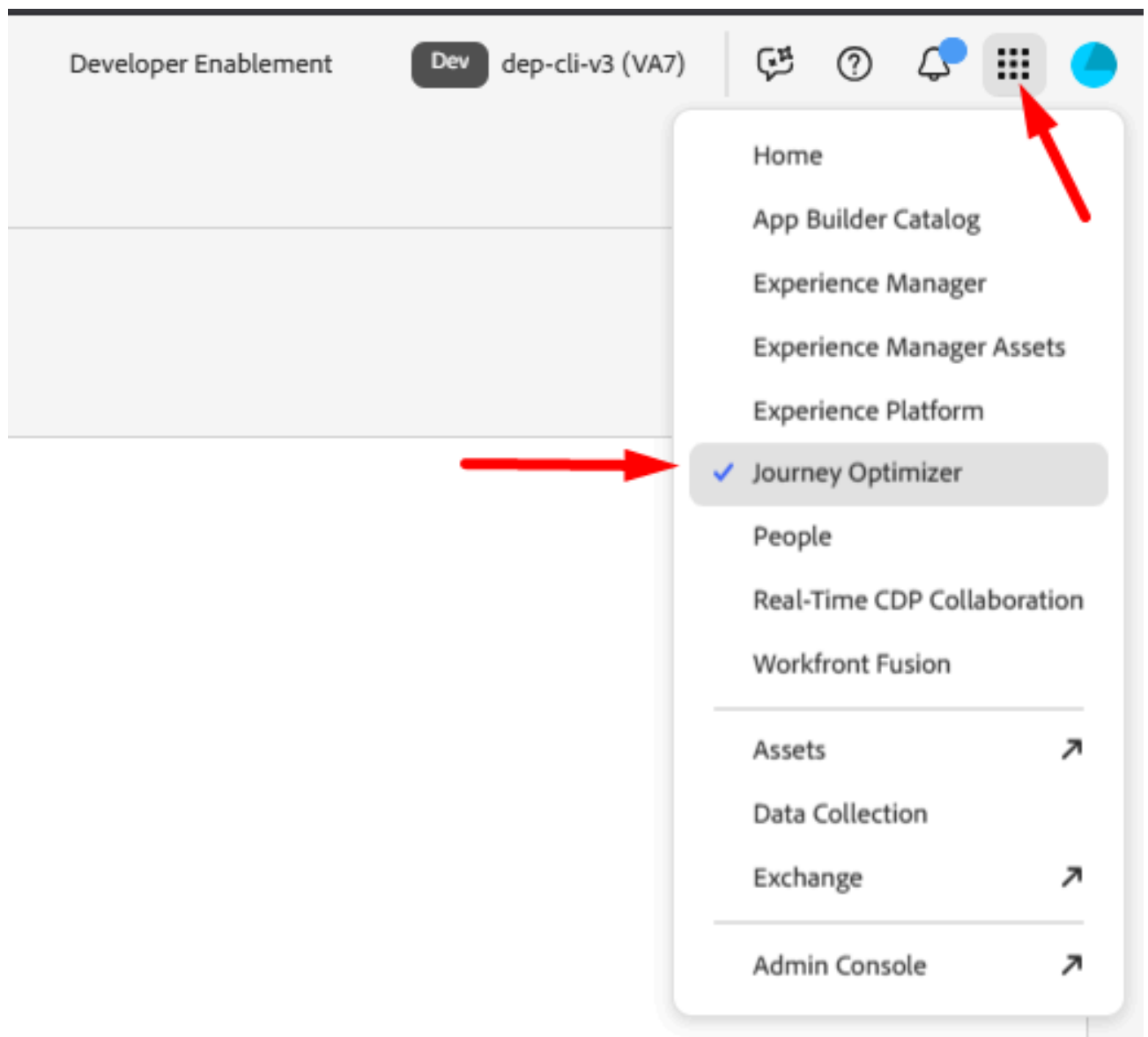
4.2.2. Create an Orchestrated Campaign

Objective

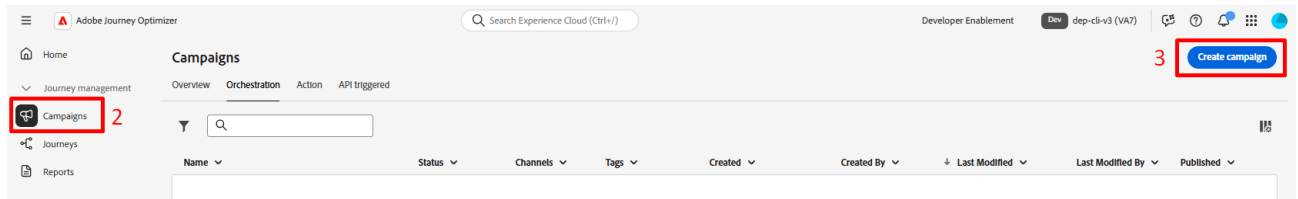
In the next step of steps you create the shell of an Orchestrated Campaign (no activities) which is the starting point for any campaign.

Navigate to Campaigns

1. First make sure you are in the Adobe Journey Optimizer application by selecting the app from the apps drawer in the upper right of your browser

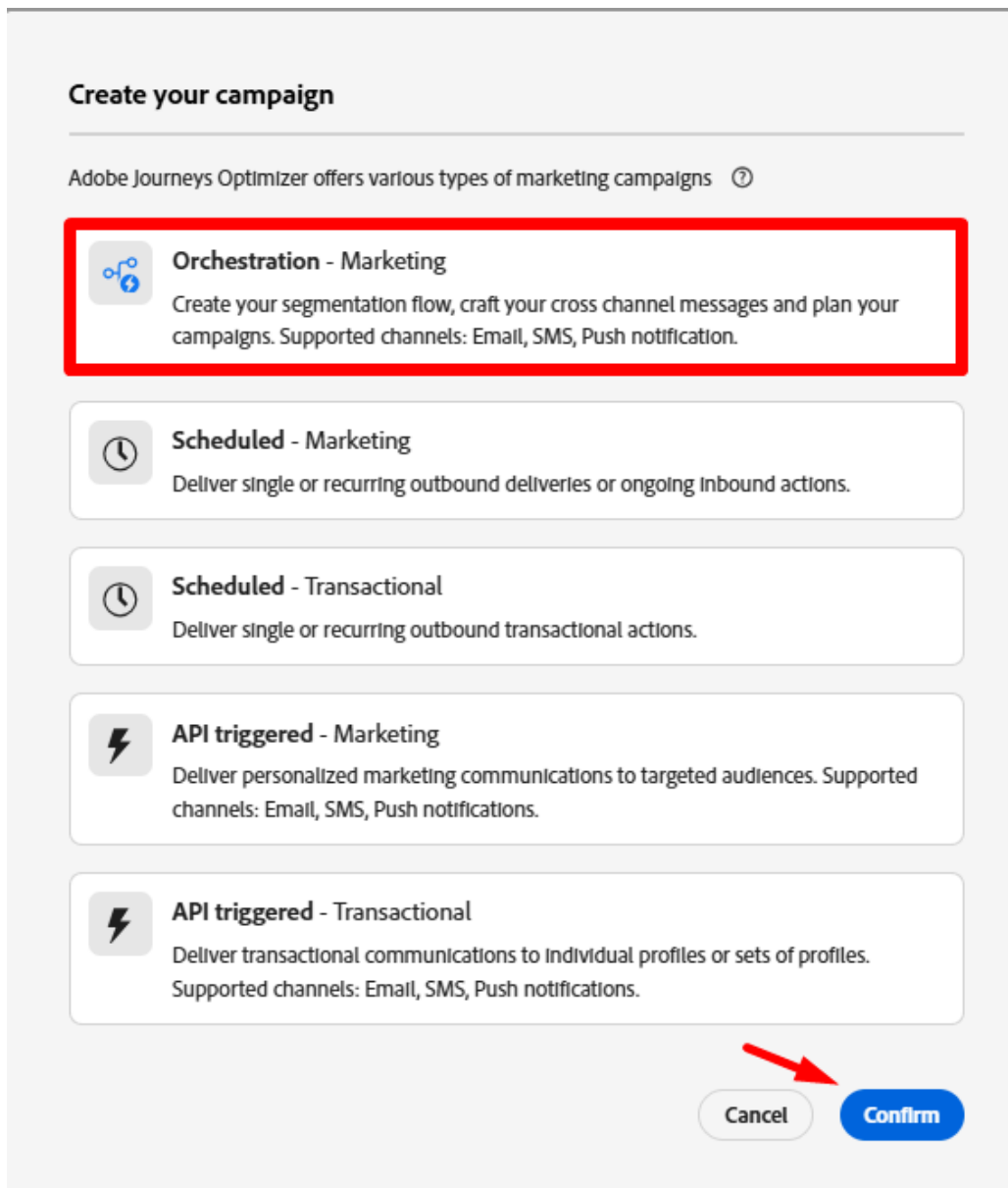


2. In the left navigation rail, select **Campaigns**
3. Then click the button **Create campaign** in the upper right



Create campaign

4. In the modal that displays select **Orchestration - Marketing** and then click **Confirm**



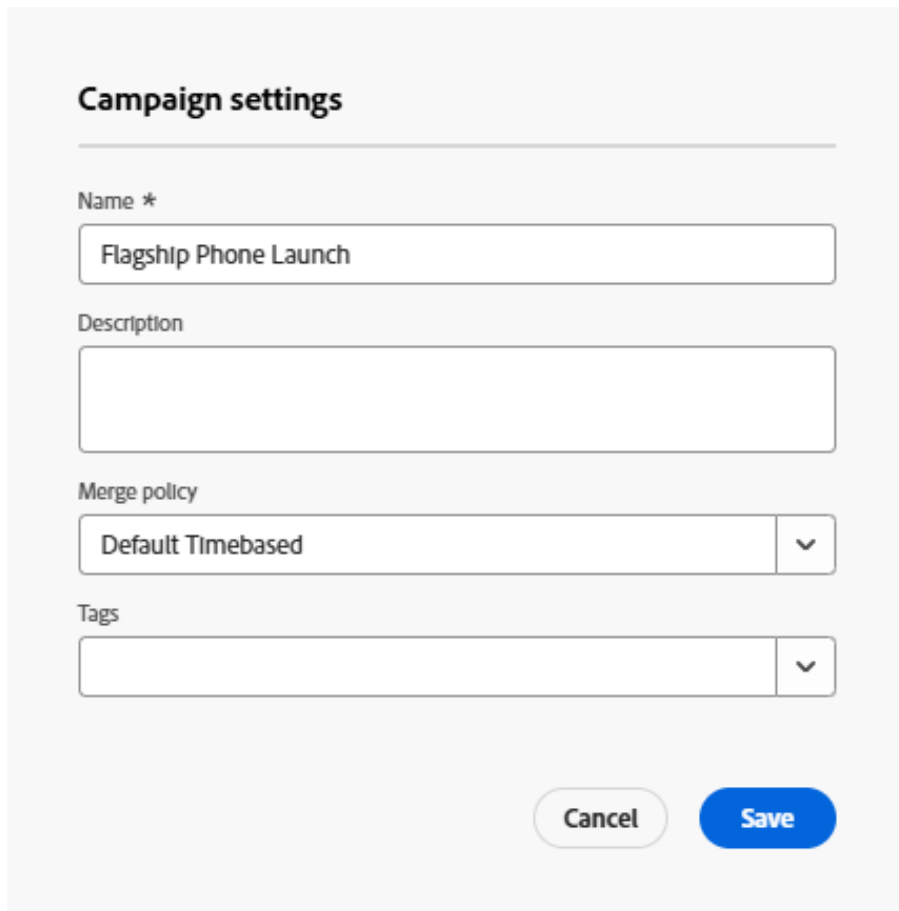
Create orchestrated campaign

Campaign Settings

1. Fill out the required campaign metadata with the following information:

- **Name** → Flagship Phone Launch
- **Description** → *leave empty*
- **Merge policy** → Default Timebased
- **Tags** → *leave empty*

When done your screen should look like below.

A screenshot of a web form titled "Campaign settings". The form has a light gray background and a white border. It contains four input fields: "Name *" with the value "Flagship Phone Launch", "Description" which is empty, "Merge policy" with a dropdown menu showing "Default Timebased", and "Tags" with an empty dropdown menu. At the bottom right, there are two buttons: a light gray "Cancel" button and a blue "Save" button.

Campaign settings

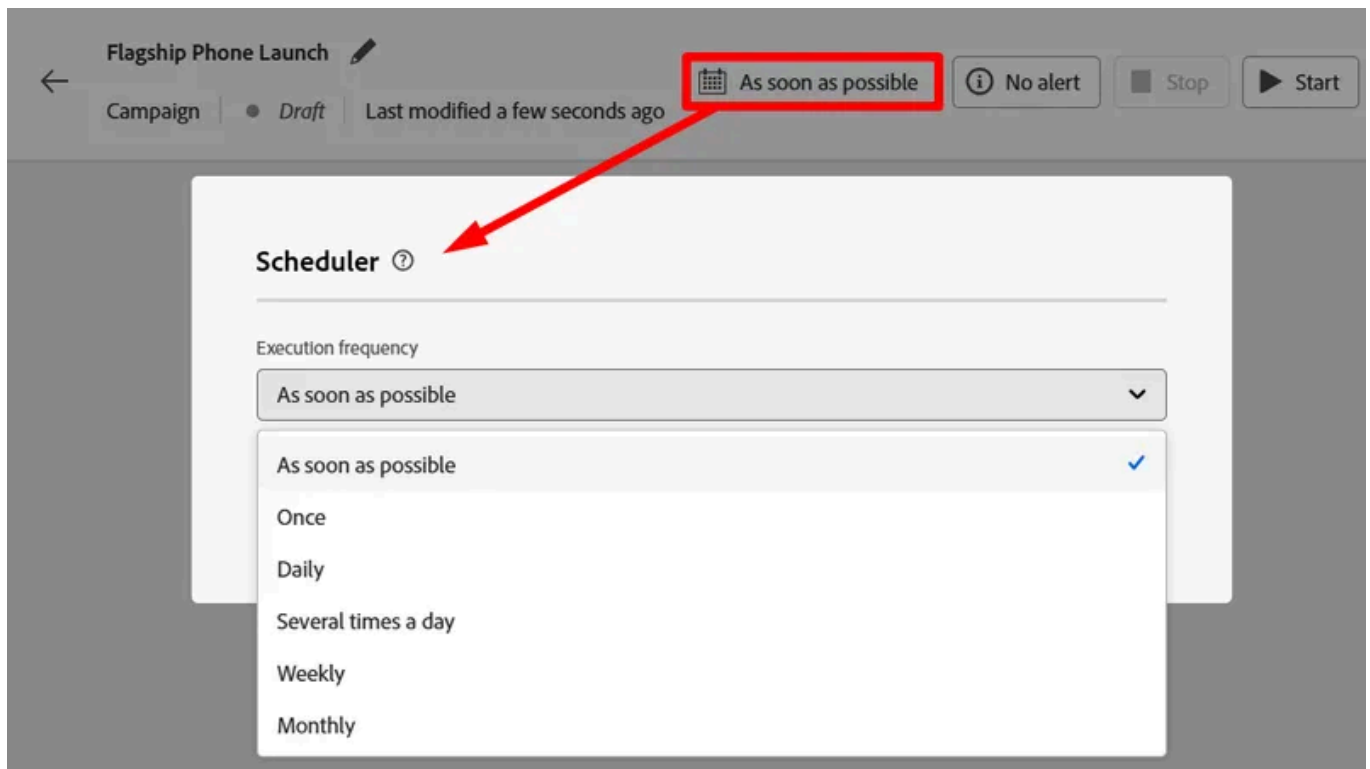
2. Click the **Save** button to continue.

Understanding Scheduling

You should land immediately into the workflow canvas after you create your campaign.

Note that in the upper right there is a scheduling option for how often this workflow should run for you campaign.

The default is always set to **As soon as possible**. For this exercise, we will use the default but there are many other options to available to you.



Scheduler options

Recap

You have now seen how to create an Orchestrated Campaign and the general options available to you when it comes to scheduling.

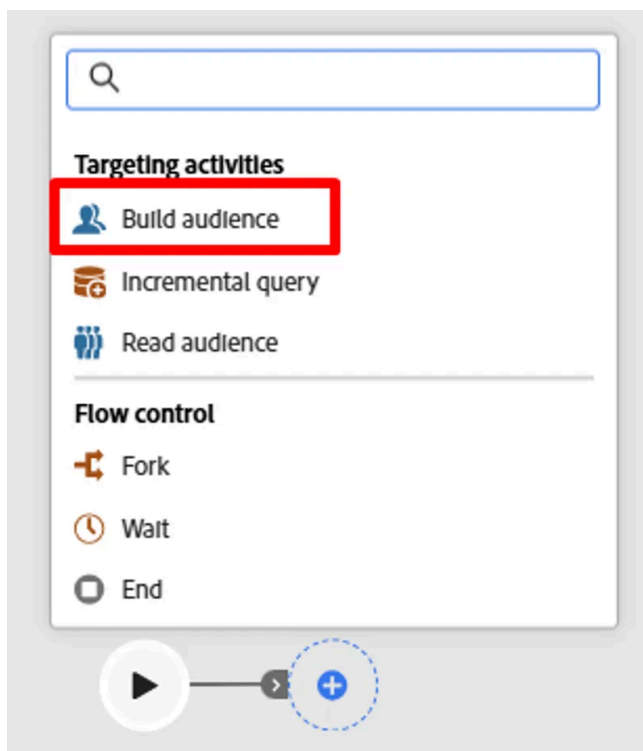
4.2.3. Build an Audience

Objective

In next few steps you will be creating the audience you want to target for the campaign which is the all the active line holders who have a make that matches the flagship phone that is launching. The goal being this is the group you want to target with a SMS message nudging them to upgrade their phones.

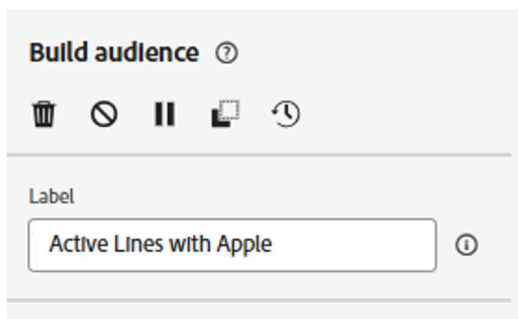
Add Build Audience Activity

1. On the canvas click the **+** symbol and then select the **Build audience** activity to add it to the workflow



Add build audience activity

2. In the right rail you see the Build audience properties. Update the Label to state the following: `Active Lines with Apple`



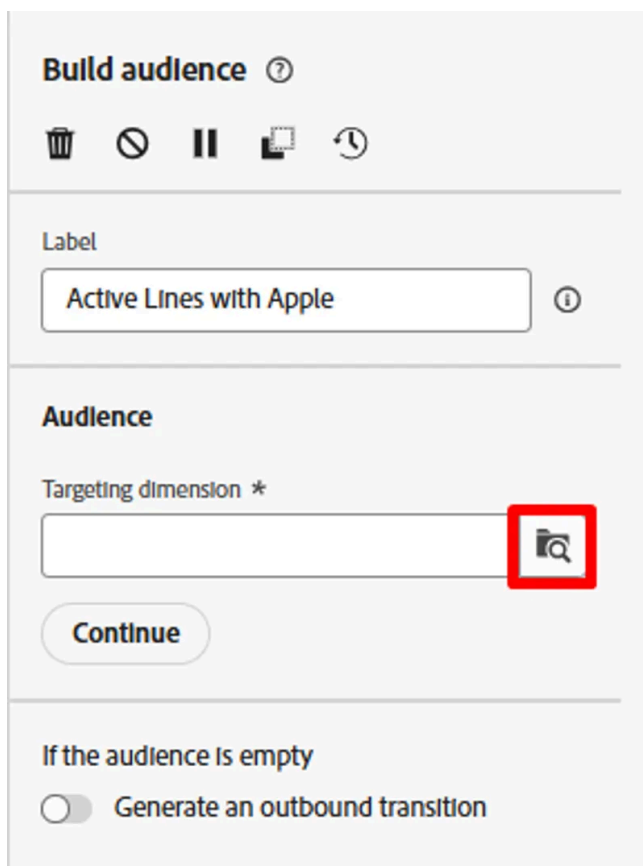
The screenshot shows the 'Build audience' interface. At the top, there's a title 'Build audience' with a help icon. Below it are five icons: a trash can, a clock, a pause button, a document icon, and a refresh icon. A horizontal line separates this from the 'Label' section. Under 'Label', there is a text input field containing 'Active Lines with Apple' and a small information icon to its right.

Build audience label

Select Targeting Dimension

The next step is to select the **Targeting dimension** (i.e. what table you want to query). Do the following steps:

1. Click on the **search icon** in the Targeting dimension box



This screenshot shows the 'Build audience' interface with more sections. Below the 'Label' section, there's an 'Audience' section. Inside 'Audience', there's a 'Targeting dimension *' label above a text input field. To the right of the input field is a search icon (magnifying glass over a document), which is highlighted by a red square. Below the input field is a 'Continue' button. At the bottom of the interface, there's a section titled 'If the audience is empty' with a toggle switch and the text 'Generate an outbound transition'.

Select targeting dimension

2. On the popup, search for and select the table named **dep-rel: Customer Line** and then click the **Confirm** button.

Select dep-rel: Customer Line

Note: Always remember the **targeting dimension** of each audience you create. You'll learn its significance in the next steps.

Note: if you ever select an Adobe created schema you note the schema starts with → (*caas*). This is just a namespace applied to the tables within the relational store and stands for Campaign as a Service :)

Create Audience

Now that you have selected your targeting dimension (what relational schema you are going to query) you can start creating your definition.

1. In the right rail click on the **Create Audience** button

Create audience

2. Next click on the **Add condition** button



Begin creating an audience

+ Add condition

Add condition

Create Condition(s)

Now its time to write the logic of the audience using the attributes found in the schema. The goal is to find all customer lines who are active and using a make of Apple.

Create condition #1

1. Using the following information and then click on the refresh icon to view the count.

- **Attribute:** Active Line
- **Value:** true

Custom condition

Attribute

Active Line (@active_indicator)

Value

True

2. Click **Refresh** icon to view the qualifying counts on the condition.

▼

Refresh Icon

...

Active Line

241

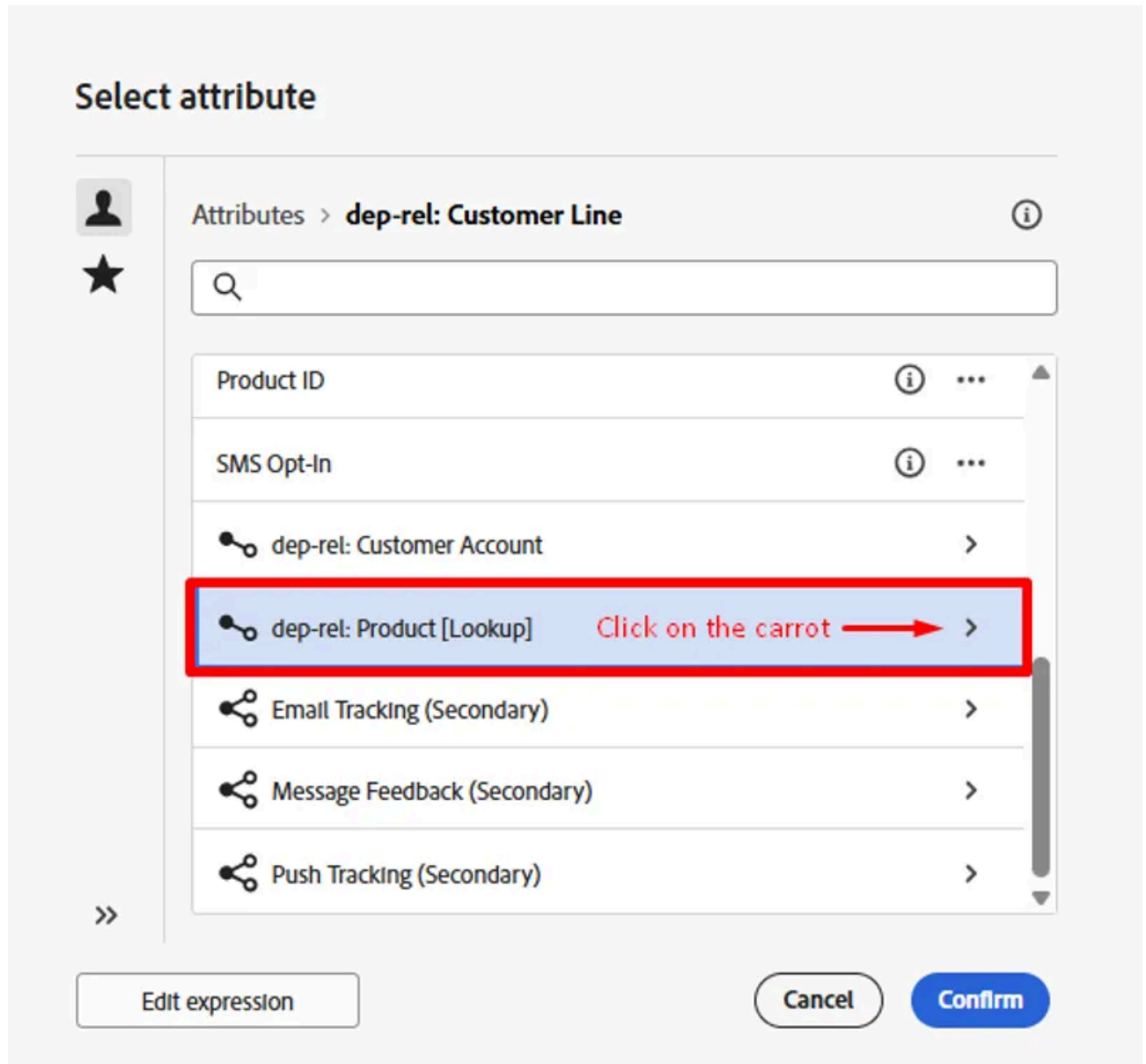
🔄

×

You should see a result of 241 if you've built the condition correctly

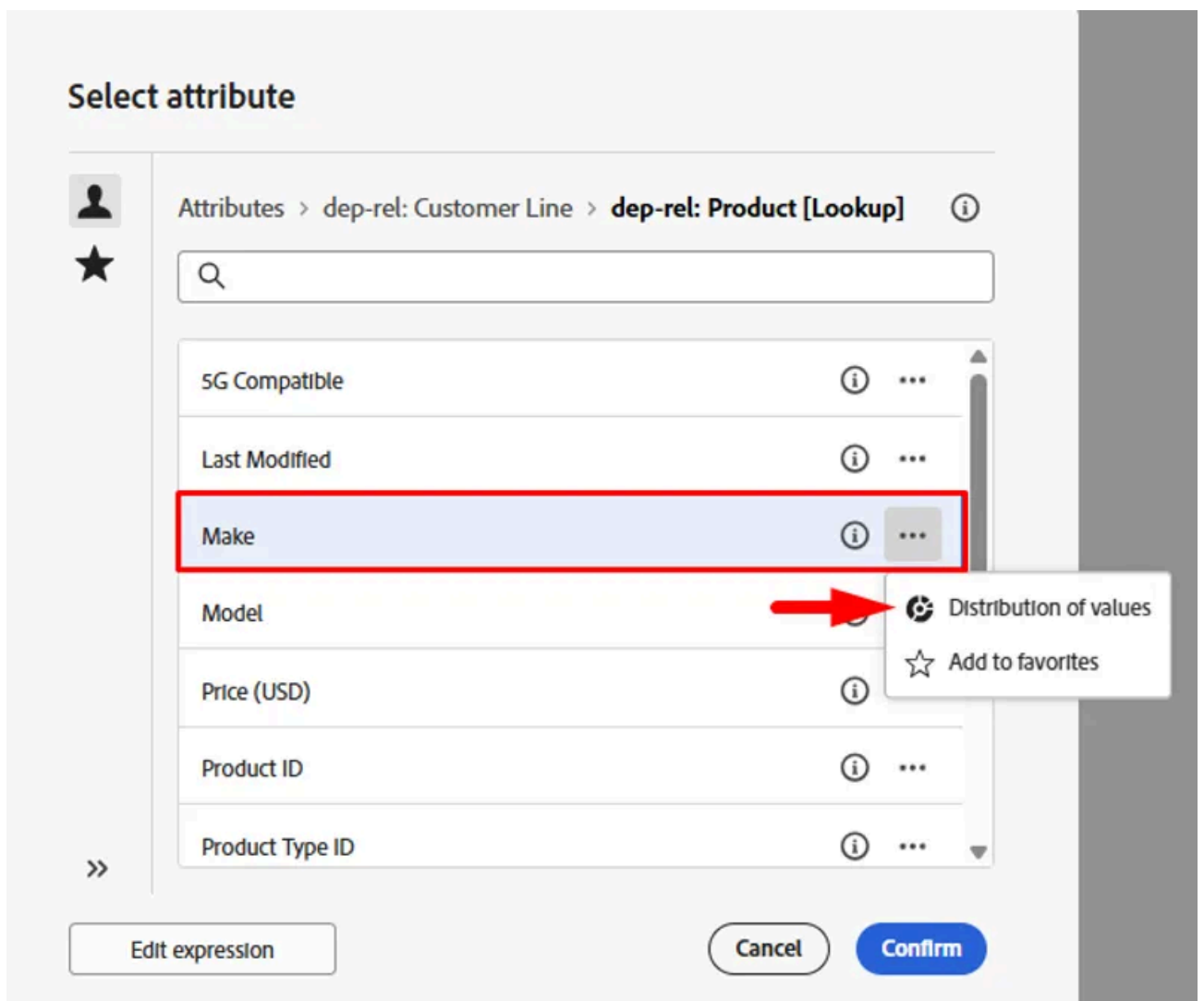
Create condition #2

1. Clicking the **Add condition** button and select the **dep-rel: Product [Lookup]** schema by clicking on the > icon



Select the dep-rel: Product [Lookup] schema

2. Look for the field named **Make** and click on the three dots and select **Distribution of values**



3. Note the various values. You only want `Apple` and thankfully it doesn't have a 100 different spellings. Click on the **Apple field** to select it and then click the **Select attribute and value button** in the upper right.

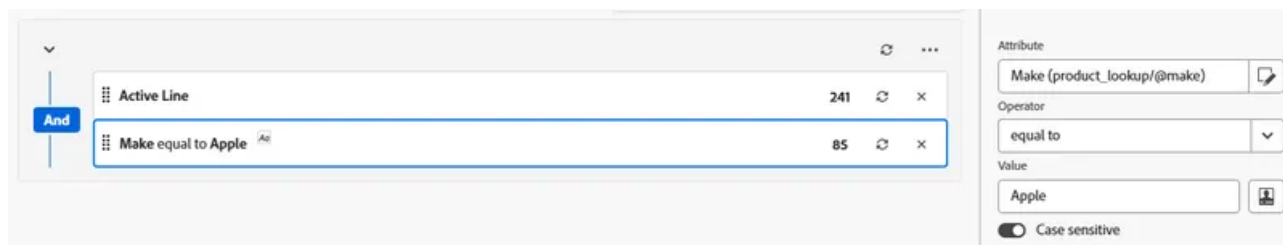


This is a prime example of where the data architect should have designed the schema with enumerations. This way a marketer doesn't have to manually select/type in the value. Shame on the data architect!

4. The **Make** field is automatically added along with conditions shown below.

- **Operator:** Equal to
- **Value:** Apple
- **Case sensitive:** Enabled

Click on the **calculate icon** and you should see 85 as the result.

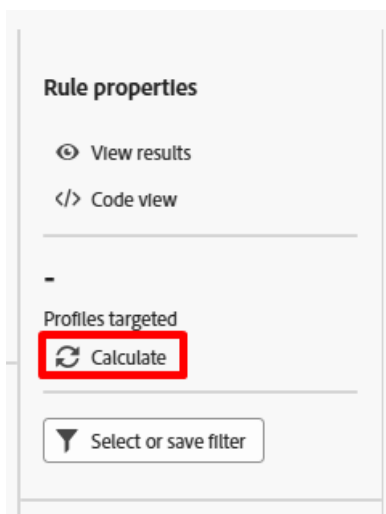


Condition #2 Final Count

Note the use of the AND operator in the group. Whether you build this in a single group like shown or multiple groups the AND is important because it tells Orchestrated Campaigns both conditions must be true.

Verify counts

1. Click on the **Calculate icon** found in the right rail under the heading Profiles targeted to get an exact estimate of the audience size. You should see **65** as the **final count**.



Calculate exact audience size

Notice how each individual condition returned a different number (condition #1 - → 241 and condition #2 → 85) but the final audience size was the lesser of the two conditions. This is because of that AND operator.

2. If you see final count of **65** click the **Confirm** button in the top right of the screen and then click the **Save** button in the top right to save your work.

Challenge

Assume for a moment you had typed in the last condition such that **Make** was equal to **apple** (lowercased) and you had left the configuration option for **Case sensitive** toggled **on**. This would make that conditions record count equal to 0. So you would have 241 active lines and 0 where the make is apple.

What would be the final audience size it this case?

The screenshot shows a user interface for configuring conditions. At the top left is a button labeled '+ Add condition'. To the right is a toolbar with icons for up, down, copy, paste, undo, redo, and delete. Below this is a list of conditions. The first condition is 'Active Line' with a count of 241. The second condition is 'Make equal to apple' with a count of 0. The conditions are joined by an 'And' operator, indicated by a blue box with the word 'And' and a vertical line connecting the two conditions. Each condition has a refresh icon and a close icon (X) to its right.

Condition	Count
Active Line	241
Make equal to apple	0

Last condition is 0

✓ Answer

Its zero :) Do you know why?

The screenshot shows the 'Create audience' interface. On the left, a list of conditions includes 'Active Line' with 241 profiles and 'Make equal to apple' with 0 profiles. The 'Make equal to apple' condition is selected. On the right, the 'Custom condition' panel shows the attribute 'Make (product_lookup/@make)', the operator 'equal to', and the value 'apple'. The 'Case sensitive' checkbox is checked. In the 'Rule properties' panel on the far right, the 'Profiles targeted' count is 0, indicated by a red arrow. Below this, there are buttons for 'View results', 'Code view', 'Calculate', and 'Select or save filter'.

Recap

You have successfully created your first audience and should now see how easy it is to develop and validate your counts within the Build Audience activity.

The screenshot shows the controls for the Build Audience activity. It includes buttons for 'As soon as possible', 'No alert', 'Stop', 'Start', and a menu button. The 'Save' button is highlighted with a red rectangle, and the 'Publish' button is blue.

4.2.4. Fork the Result

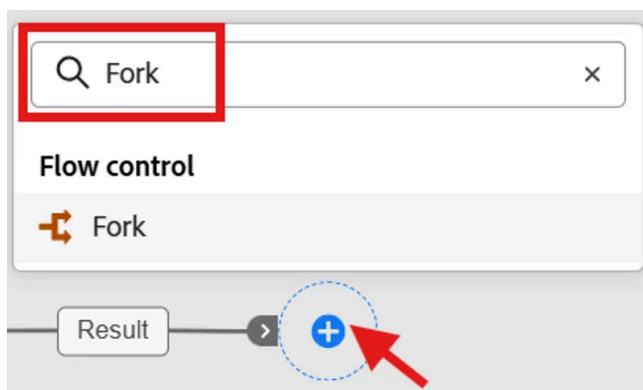
Objective

This step is simple in that all you want to do is add a Fork activity such that you can duplicate the result to do two different things with it in future steps:

1. Save the audience for others to use for advertising or cross-channel purposes
2. Send SMS messages to the individual lines.

Create the Fork

1. On the workflow canvas, click the **+** icon after Build Audience activity and select the **Fork Activity**



Add a fork activity

2. Update the names of each transition in the fork by click on the transition and then assigning the names as outlined below:
 - **Top** → Save Audience
 - **Bottom** → SMS

Fork ?

⊘ || 📄 ⌚

Label

ⓘ

Transitions ?

+ Add transition

Transition 1

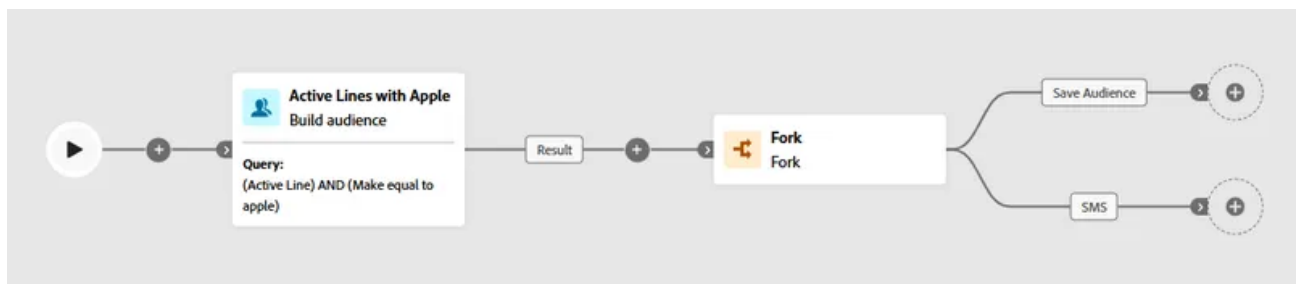
🗑️

Transition 2

🗑️

Update the transition names

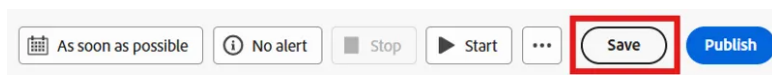
When done your canvas should now look like so...



Final result with fork activity

A fork activity essentially is just duplicating the result from the previous activity into two independent branches

4. Click **Save** on the top of the workflow canvas.



Save your work

That was pretty difficult, wasn't it 😊

Recap

Welp, you created a Fork of the result (i.e. duplicate the result) which allows you to clearly dictate a branch to process a Save Audience whereas the other one can be used for SMS sending.

You need to use Forks especially if you plan to save the audience as a Save Audience activity does not allow activities to follow it.

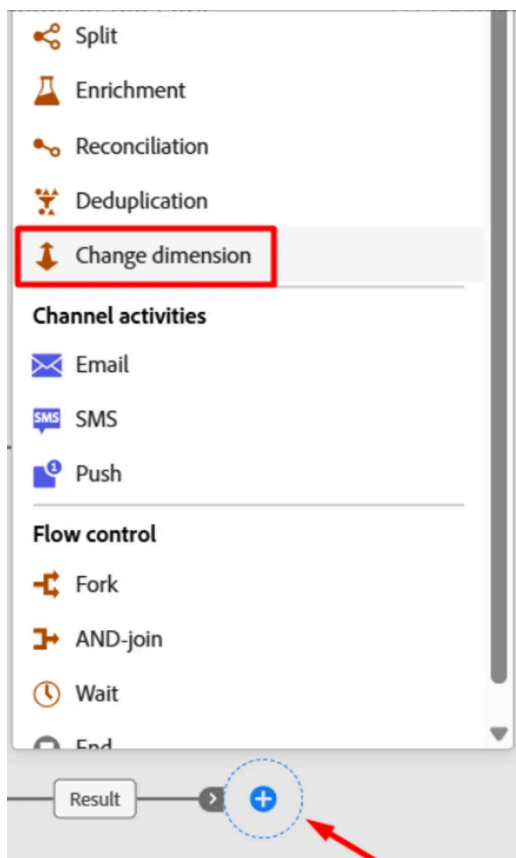
4.2.5. Save the Audience

Objective

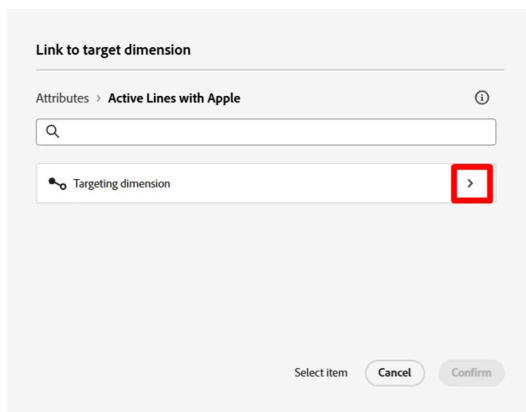
In the next set of steps you will be saving the audience you created back to the Audience Portal so other solutions across Adobe Experience Platform and its applications can leverage it for their own use cases.

Change the Dimension

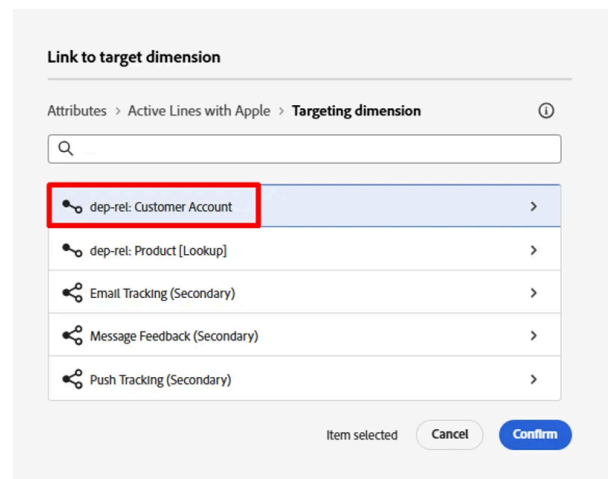
1. On the workflow canvas, click the **+** icon on **Save Audience** branch and from the list of activities, select the **Change Dimension** activity



2. Update the properties of the change dimension as outlined below:
 - **Label:** Convert Line to Account
 - **New target dimension:** dep-rel: Customer Account



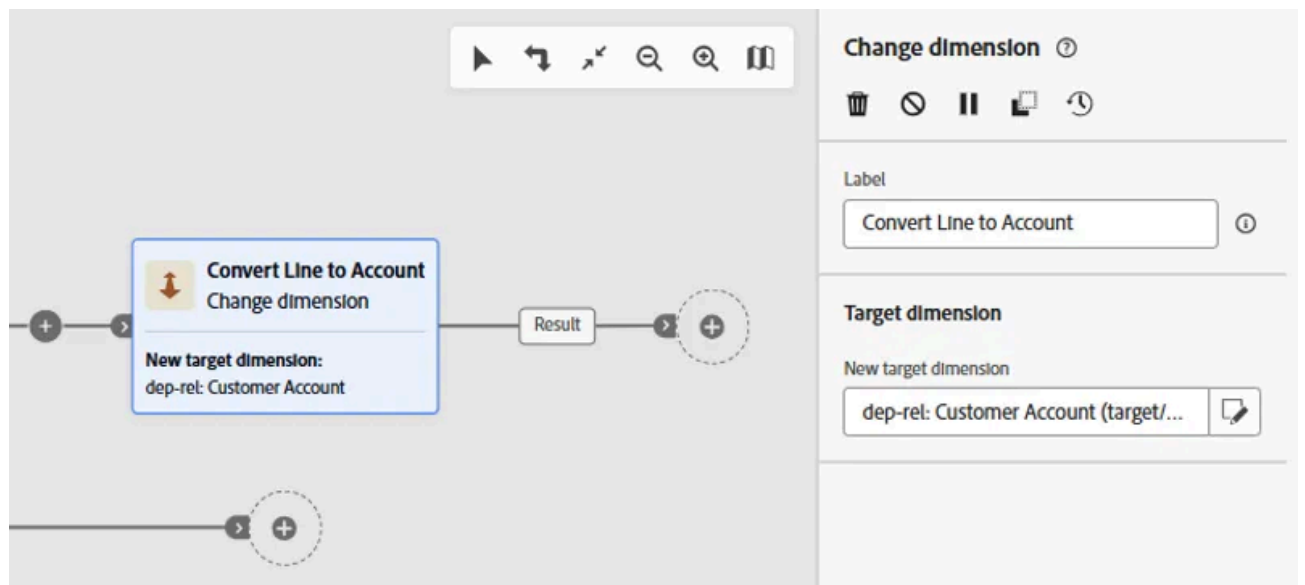
Click arrow on targeting dimension



Select Customer Account

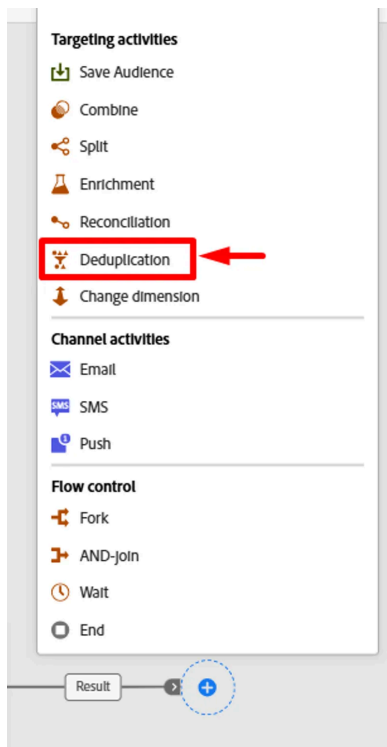
Why are you doing this you ask? Remember that to join to the Real-Time Customer Profile (which is where you save audiences to) you have to use the Profile Target Mapping you configured which only joins from the dep-rel: Customer Account schema.

3. When done, you should now see this in your canvas. Save your work!



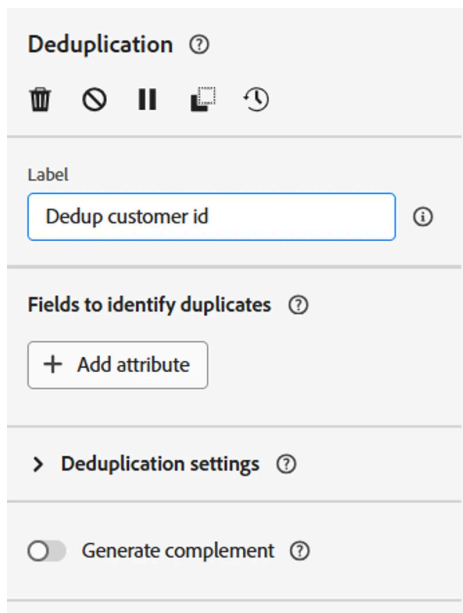
Deduplicate the Result

1. Click the **+** icon after the Change Dimension activity and from the list of activities select the **Deduplication** activity



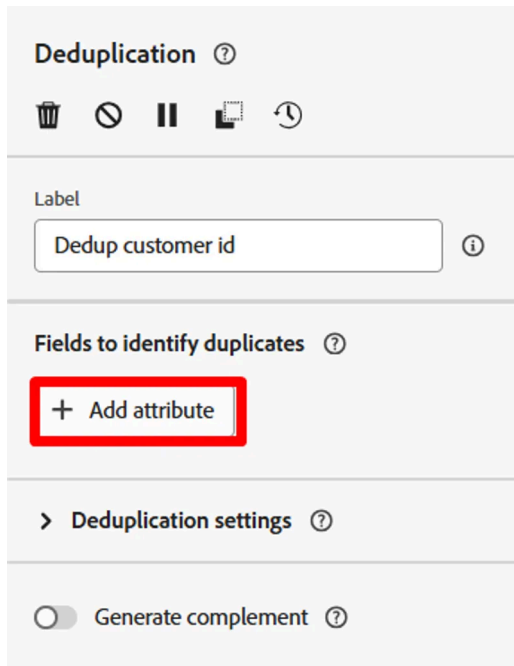
Add deduplication activity

2. Update the label of the Deduplication activity to `Dedup customer id`



Deduplication label and primary set

3. Now click the **+ Add attribute** button and select the field from the schema titled **Customer ID**



Deduplication ⓘ

🗑️ ⛔ ⏸️ 📄 ⌚

Label

ⓘ

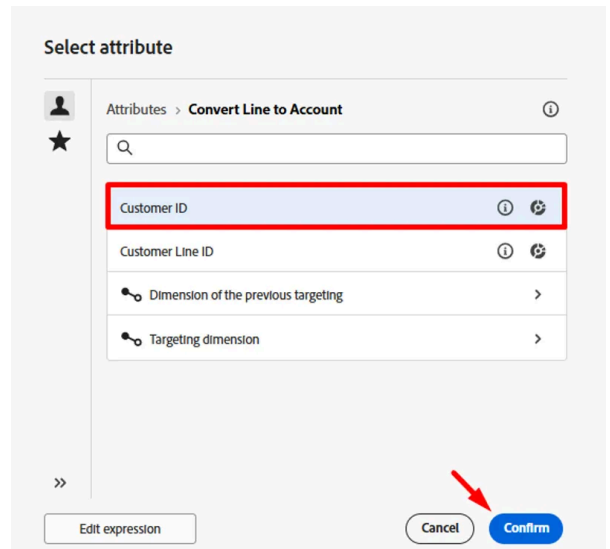
Fields to identify duplicates ⓘ

+ Add attribute

> **Deduplication settings** ⓘ

☐ **Generate complement** ⓘ

Add attribute



Select attribute

Attributes > **Convert Line to Account** ⓘ

★

Customer ID ⓘ ⚙️

Customer Line ID ⓘ ⚙️

🔗 Dimension of the previous targeting >

🔗 Targeting dimension >

>>

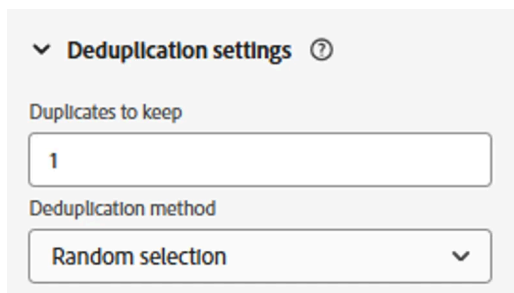
Edit expression

Cancel **Confirm**

Select the Customer ID field

4. Under the Deduplication settings, ensure you have the following set:

- **Duplicates to keep:**
- **Deduplication method:**



▼ **Deduplication settings** ⓘ

Duplicates to keep

Deduplication method

▼

Deduplication settings

Note: the other options for deduplication allow you to specify your own custom logic. Most of the time if you need to deduplicate you'll be doing it using the primary key of the table.

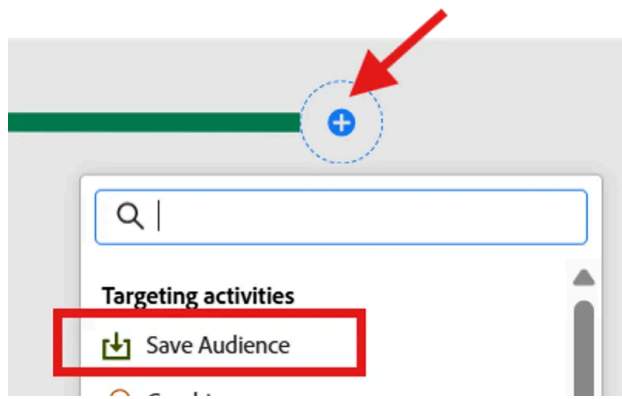
- When you are done your canvas should now look like this. Click the **Save** button in the upper right before moving on.

The screenshot shows a workflow canvas on the left and a configuration panel on the right. The canvas contains a 'Dedup customer id' activity box with a 'Fields to identify duplicates' section containing 'Customer ID'. This is followed by a 'Result' box and a '+' icon in a dashed circle. The configuration panel on the right is titled 'Deduplication' and includes sections for 'Label' (set to 'Dedup customer id'), 'Fields to identify duplicates' (with an 'Add attribute' button and one attribute 'Customer ID (@customer...)' listed), and 'Deduplication settings' (with 'Duplicates to keep' set to 1 and 'Deduplication method' set to 'Random selection'). A 'Generate complement' toggle is at the bottom.

Deduplication activity fully configured

Add Save Audience Activity

- Click the **+** icon after the Deduplication activity and select the **Save Audience** activity



Add the save audience activity

2. In the right rail set the properties of the activity to the following:

- **Audience Label:** Apple Upgrade Eligible Customer Accounts
- **Profile mapping field:** dep-rel: Customer Account - customer id

Save Audience ⓘ

🗑️ ⌛ ⏸️ 📄 ⌛

Label

Save Audience ⓘ

Audience label *

Apple Upgrade Eligible Customer Accounts

Profile mapping field *

dep-rel: Customer Account - custome... ▼

Audience Mappings *

+ Add Audience Mapping

> Dep_rel_customer_account_Cu... 🗑️

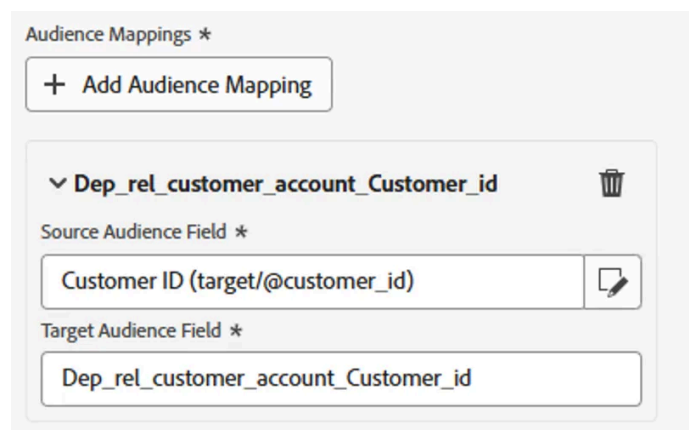
Save audience label and profile mapping

Note: The "Profile mapping field" is what you setup previously so that the Relational Store can join to the Real-Time Customer Profile. The profile has been modeled as a Customer Account level so you want to save the audience in the same. Hence the need for the change dimension and the deduplication.

Audience Field Mappings

By default the primary key of the targeting dimension (i.e., Customer ID) is added to the audience as a field. You can see this if you look in the right and expand the field. Two things to note:

- **Source Audience Field** → refers to the field coming from the relational schema
- **Target Audience Field** → the name of the field that will be created as part of the audience save



The screenshot shows the 'Audience Mappings' section with a '+ Add Audience Mapping' button. Below it, a mapping is expanded for 'Dep_rel_customer_account_Customer_id'. The 'Source Audience Field' is 'Customer ID (target/@customer_id)' and the 'Target Audience Field' is 'Dep_rel_customer_account_Customer_id'.

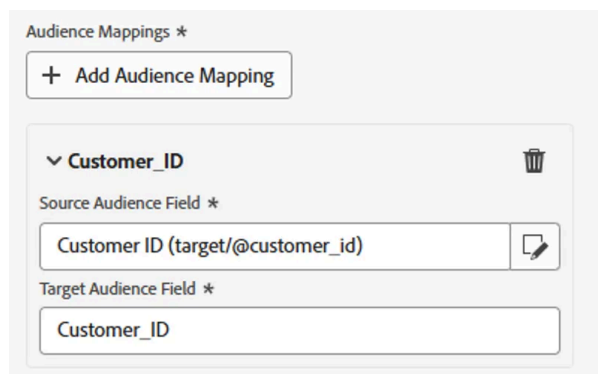
Default field added to Save Audience activity

Note how terribly the Target Audience Field is named

`Dep_rel_customer_account_Customer_id`. You should always change this to something more legible to a marketer, no excuses.

Fix Default Audience Field

1. Rename the default Target Audience Field to **Customer_ID** like shown below:



The screenshot shows the 'Audience Mappings' section with a '+ Add Audience Mapping' button. Below it, a mapping is expanded for 'Customer_ID'. The 'Source Audience Field' is 'Customer ID (target/@customer_id)' and the 'Target Audience Field' is 'Customer_ID'.

Default field renamed

Now you have a human legible field name ☐

2. Click the **Start** button to run your workflow. Your workflow should now look like this and you should see the counts as follows:

- Build audience: 65
- Convert Line to Account: 65
- Dedup customer id: 46



Workflow test run with save audience activity

Note: The save audience activity will only create the audience when the workflow is published, not when it is simply started. When the audience is created, it will include all the attributes you added to it and will join to the Real-Time Customer Profile during the next scheduled daily run of the segmentation service job.

DO NOT PUBLISH YOUR WORKFLOW!

Challenge

What happens if you do not deduplicate before saving the audience? Will the audience store all 65 records or only the 46?



Save audience with dedup activity beforehand

✓ Answer

The audience will store all 65 records, but a read audience activity will dedup them on import based on the join condition 

Recap

You should now have a good understanding of how the Save Audience works and why deduplication matters. Remember that you always need to have the Profile Target Mapping defined because the Relational Store data has to know how to join to the Real-Time Customer Profile. The Profile Target Mapping is the join condition 

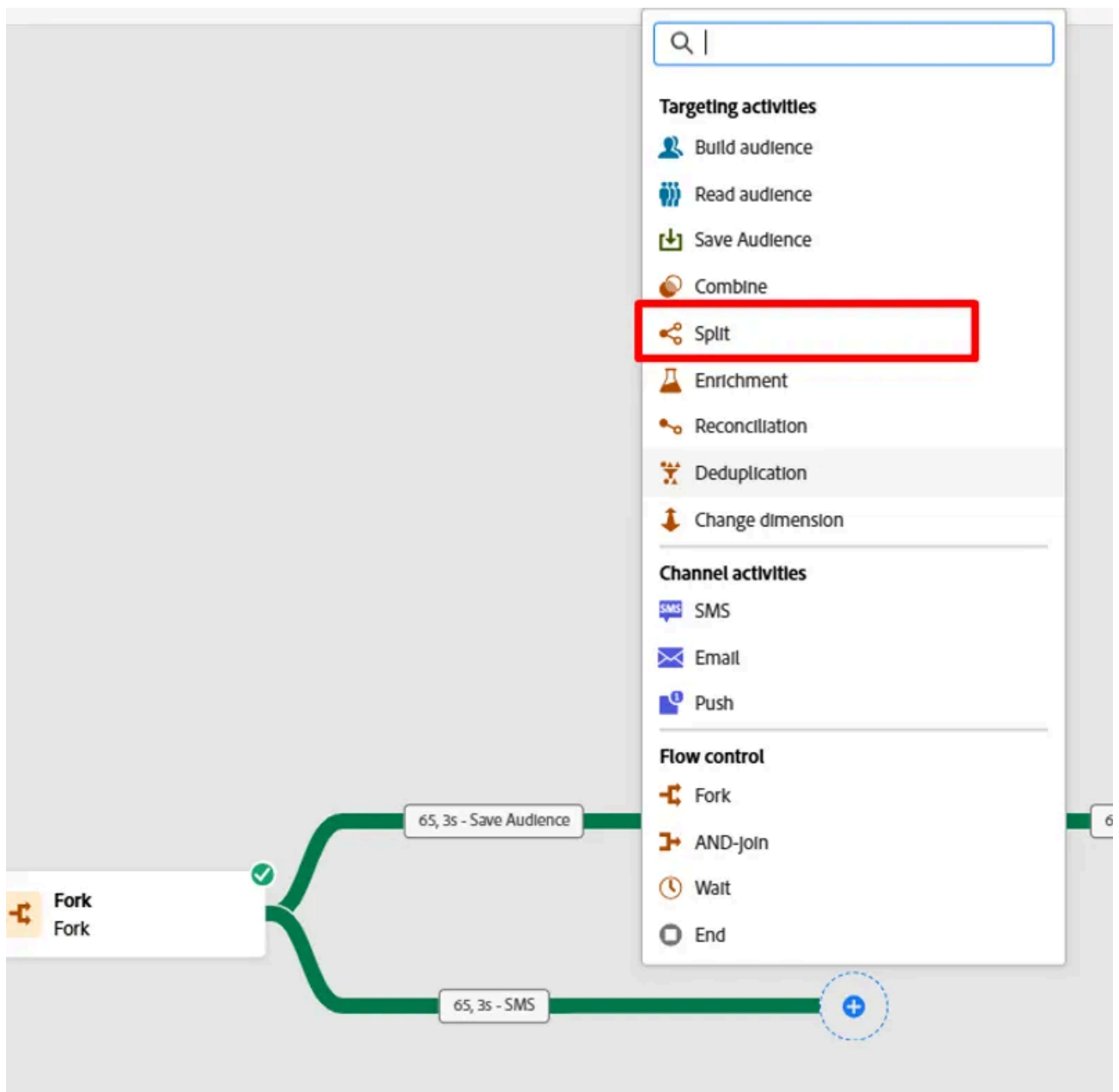
4.2.6. Filter the Lines

Objective

In the next set of steps you are going to filter out all the lines that are actually not allowed to be targeted with a SMS message due to the their opt'ing out at the line level. You can not rely here on Profile consent because this is a line level target.

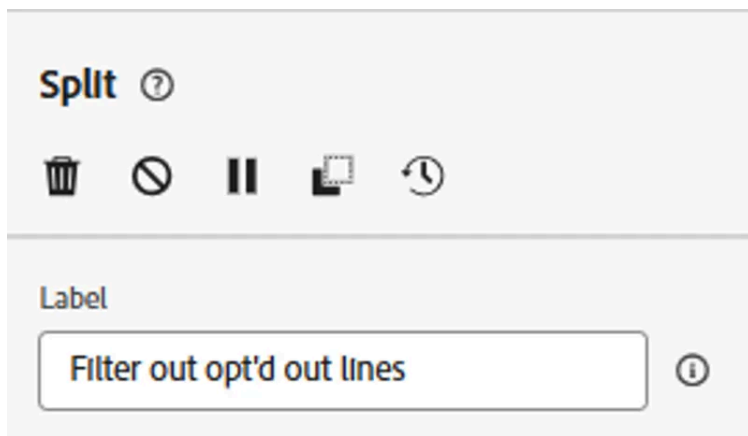
Setup Split activity

1. Click the **+** icon on the bottom transition of the Fork activity and select the **Split** activity on the popup.



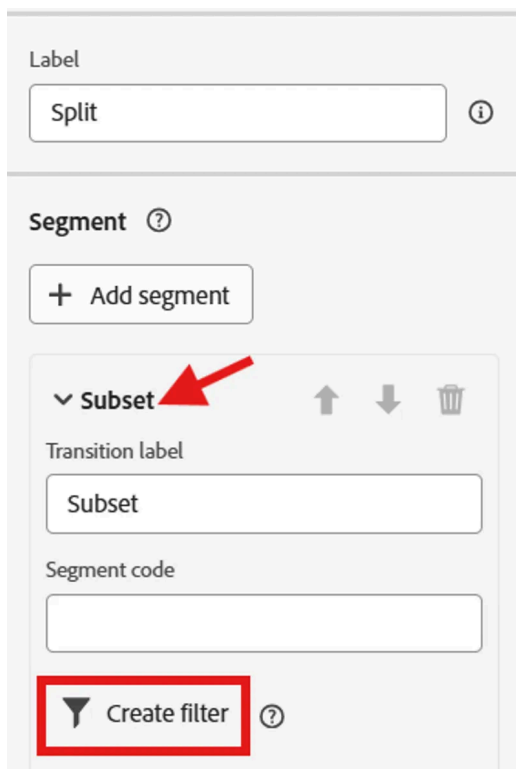
Add split activity to bottom branch

2. In the right rail update the Label to state the following: `Filter out opt'd out lines`



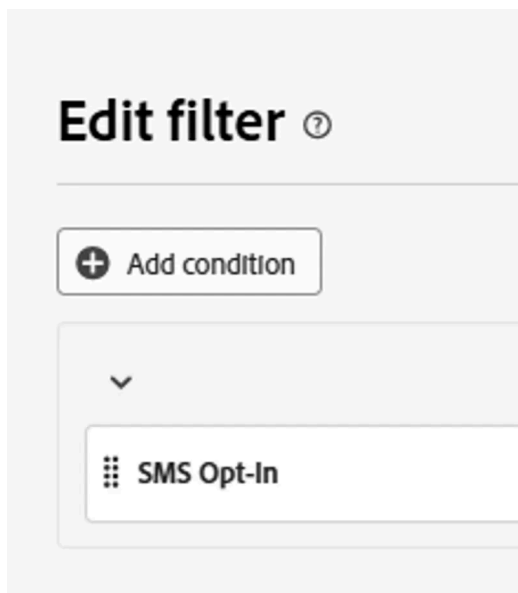
Split label

3. In the right rail expand the default segment **Subset** section and click the **Create filter** button



Add a filter to the split

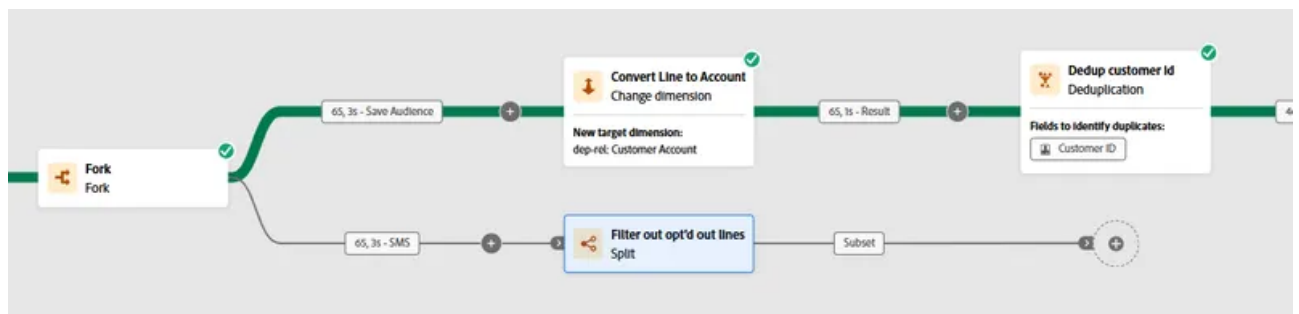
4. Add a condition to ensure that you remove all Customer Lines that are opt'd out of SMS messaging and then click **Confirm**.



SMS Opt-in condition

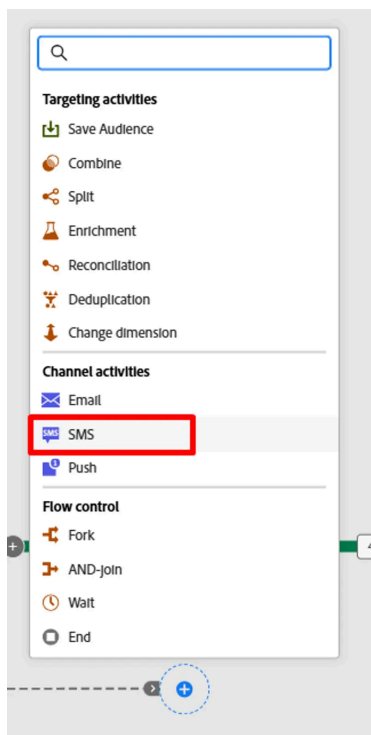
You need to figure out how to create the condition but the final result should match the screenshot above. You got this!

5. Click the Save button in the upper to save your work. Your canvas should look like so now...

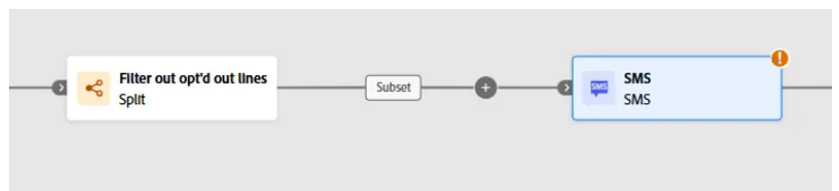


Add the SMS Activity

1. On the workflow canvas, click the + icon after the split condition you added and select the **SMS Activity**



Add the SMS activity



SMS activity on the canvas

2. In the right rail click on the Edit SMS button to start configuration of the SMS message

 A screenshot of the 'SMS' configuration panel. At the top, it says 'SMS' with a help icon. Below are icons for delete, disable, pause, copy, and refresh. A warning box states: 'Create SMS content. The SMS content must be created before executing the campaign.' Below this, there is a 'Label' field with 'SMS' and an info icon, and a 'Category' dropdown menu set to 'Marketing'. A section titled 'View the content or settings of this action.' contains an 'Edit SMS' button with a pencil icon, which is highlighted with a red rectangular box. At the bottom, there is a toggle switch for 'Send without confirmation'.

Edit SMS

3. In the top nav click on the Actions menu item and then from the SMS configuration drop-down select the channel you previously created.

The screenshot shows the 'Actions' tab in a configuration interface. The 'Mobile message' section has a dropdown menu for 'Mobile message channel configuration' which currently shows 'No results'. A red arrow points to this text with the exclamation 'AHHHHH!' written next to it. Below this, there are sections for 'Business rules' (with a 'Rule set' dropdown) and 'Action tracking' (with a checked checkbox for 'Track clicks on links in Mobile message').

Oh no ☹! Why are you getting No results? Didn't you setup your SMS channel already? Is the product broken?

FREAK OUT!!!!!!!!!!

Freak Out Moment

The transition of the fork currently has a targeting dimension of Customer Line (i.e what table the current result relates to in the Relational Store). What is unique with Orchestrated Campaigns though is you always join back to the Real-Time Customer Profile at send time so delivery and tracking information from messages is attributed to a profile. This join was pre-build for you from the Customer Account table.

The channel configuration for SMS was already setup for you beforehand and it currently looks like so...

Execution details

Journey & Action Orchestrated campaign

☒ Enabled

Execution dimension

Deliver one message per: *

☐ Target Dimension ☒ Target + Secondary Dimension

Profile Target Dimension *

dep-rel: Customer Account - customer_id ▼

Secondary Dimension *

Customer Line ▼

Execution Address

Source

☐ Profile ☐ Target Dimension ☒ Secondary Dimension

SMS Execution Field

dep_rel_customer_line.mobile_phone ✓ 

How you read this is as follows:

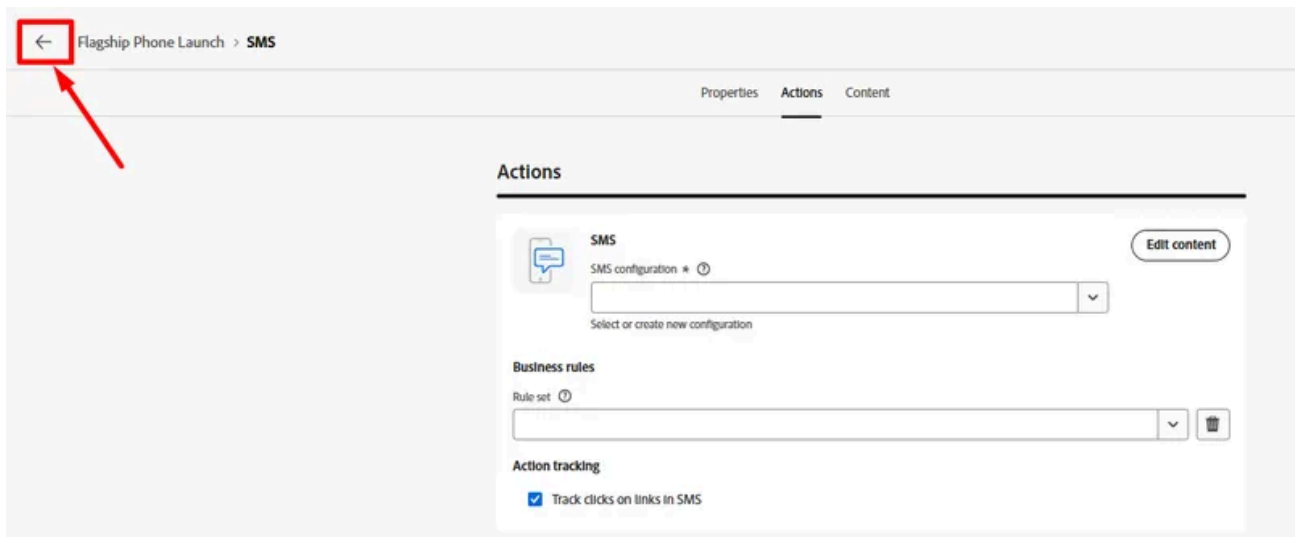
- Deliver one message per the target dimension (i.e. Customer Account) on the number of related records found in the secondary dimension (i.e. Customer Line)
- Execute each SMS delivery using the mobile phone number found in the secondary dimension (i.e. Customer Line)

This unique ability to send many messages to one profile is one of the primary features of Orchestrated Campaigns that makes it different from Journeys.

So how do you get this to work? Add a change dimension 😊

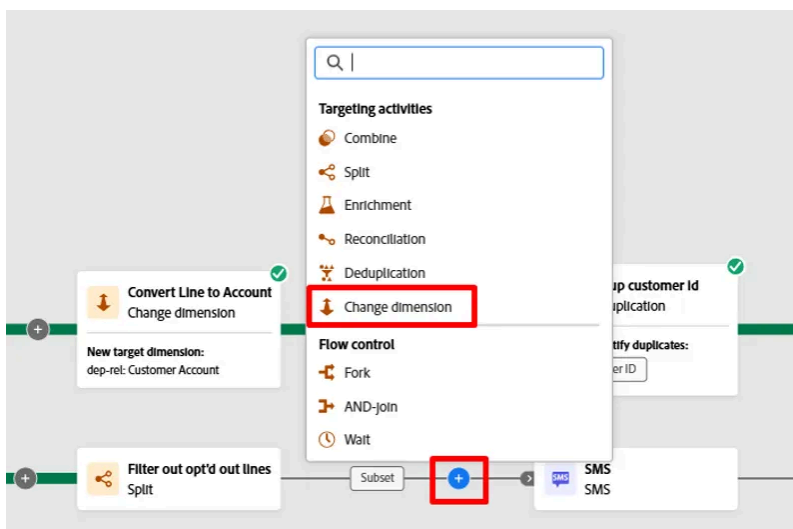
Add Change dimension

1. Click the back button on the SMS edit screen



Exit the sms activity

- On the workflow canvas, click the **+** icon between the Filter and SMS activities and select **Change Dimension**.



Add change dimension

- In the right update the change dimension with the following information:

- Label:** Convert Line to Account
- New target dimension:** dep-rel: Customer Account

Change dimension ?







Label

Convert Line to Account ⓘ

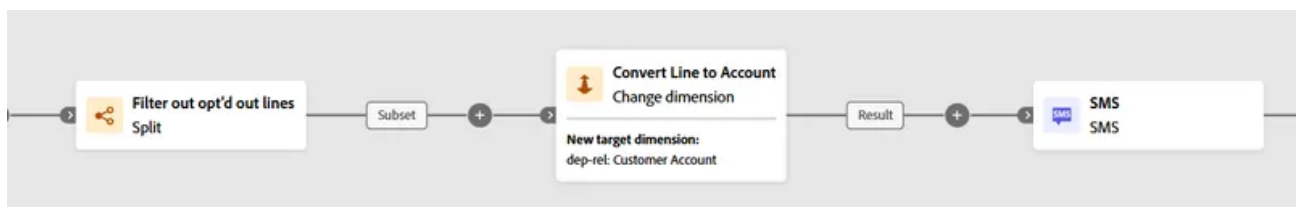
Target dimension

New target dimension

dep-rel: Customer Account (target/... 

Change dimension configuration

- Click the **Save** button in the upper right of the canvas to save your work. When done your workflow should now look like this...



Final workflow after change dimension

SMS Message Configuration

Now that you've fixed the workflow let's try re-configuring the SMS.

- Click on the SMS activity in the workflow canvas and then, in the left rail, click on the **Edit SMS** button

SMS ?



Create SMS content 

The SMS content must be created before executing the campaign.

Label



Category ?



View the content or settings of this action.

 Edit SMS

☐ Send without confirmation

Edit SMS

This screen takes a while to load. I know its annoying, trust me its being fixed

2. In the top nav click on the **Actions** menu item and then from the SMS configuration drop-down select the channel you previously created.

Properties **Actions** Content Schedule

Actions

**Mobile message** Edit content

Mobile message channel configuration * ?

dep-rel: Customer Account + dep-rel: Customer Line

Business rules

Rule set ?

Action tracking

☒ Track clicks on links in Mobile message

SMS configuration with your sms channel

Feels good doesn't it 🎉

Recap

You made it through this one and hopefully learned two very important things:

1. Your final results targeting dimension has to match the channel configuration you want to use
2. The Change dimension activity is likely going to become your best friend for ensuring this happens

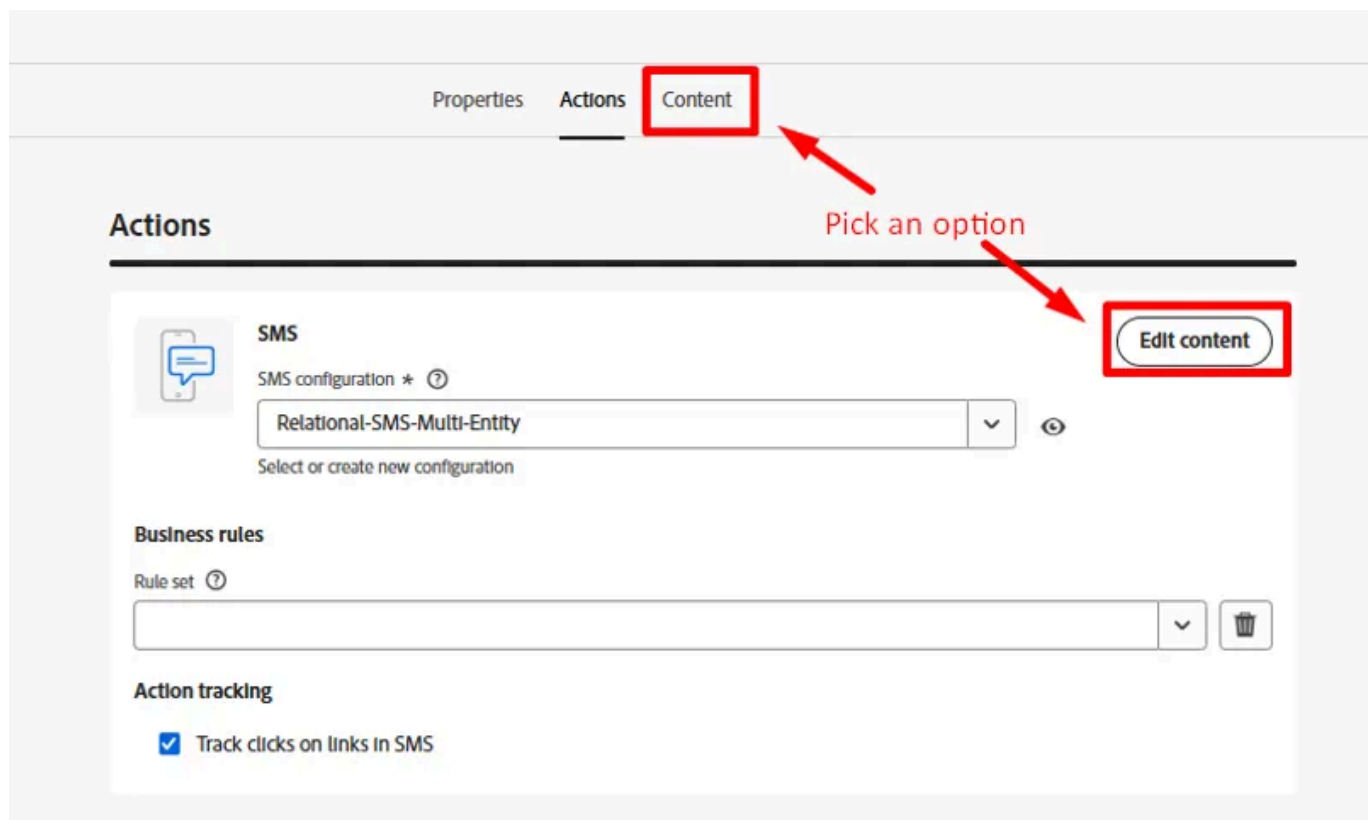
4.2.7. Compose the SMS

Objective

In the next few steps you are going to compose a VERY simple SMS message. You'll see how you can easily add some content at an EXTREMELY basic level and personalize the message based on the data in the relational store.

Navigate to Content

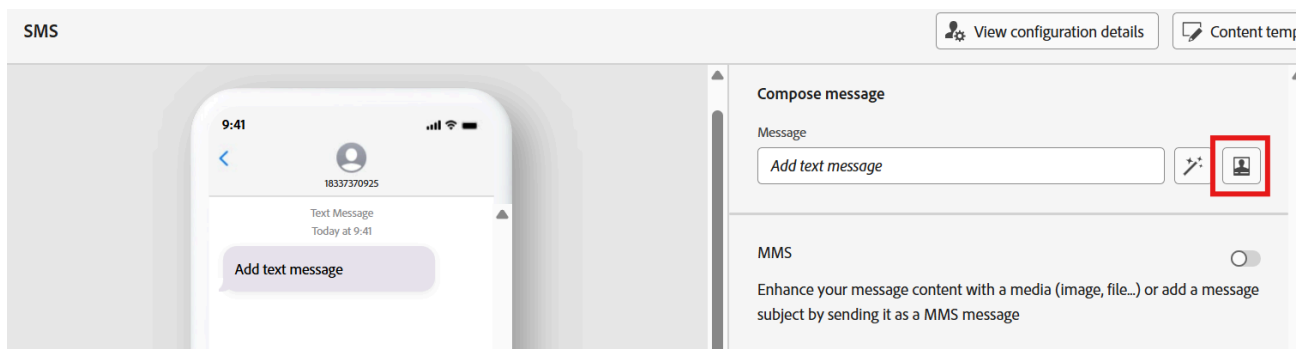
Click the **Edit content** button, or navigate directly to the **Content** tab



Edit content

Create the Message

1. Click on the **Personalization** button to create your message.



The "magic wand" option uses AI to help you write a message. Check it out if you'd like but we won't be covering it in this lab.

2. Copy and paste the text below into the SMS message body.

Hi from Connection 5G! Your phone_make phone_model is eligilbe for a free upgrade to

Be sure to turn Word wrap to **On** in the message editor. You can find in the lower right pane of the window.

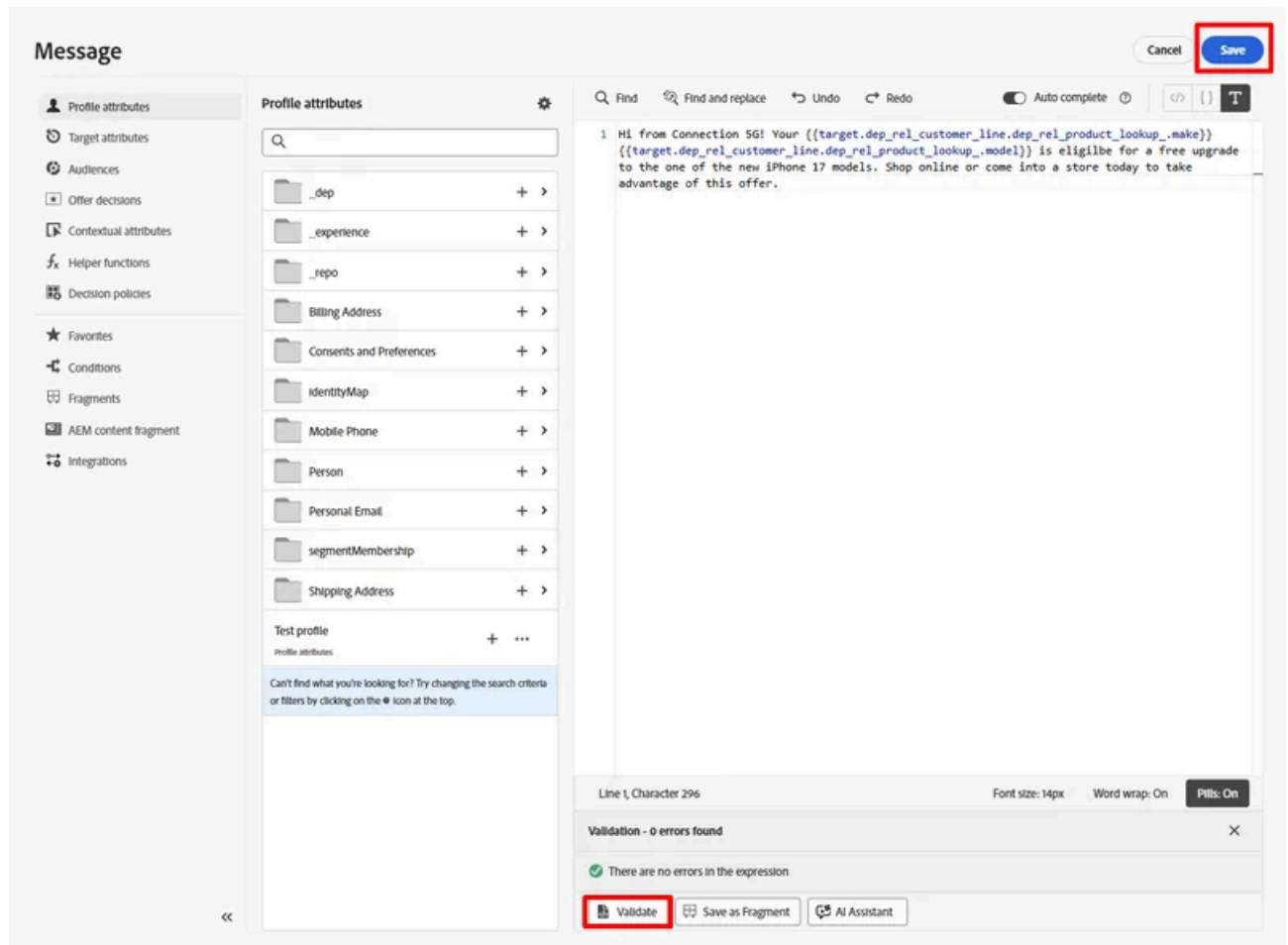
3. Update the two fields in the message called **phone_make** and **phone_model** below using the **Target attributes** option in the left rail. When done your message should match the screenshot.

```
Hi from Connection 5G! Your {{target.dep_rel_customer_line.dep_rel_product_lookup_.make}}  
{{target.dep_rel_customer_line.dep_rel_product_lookup_.model}} is eligilbe for a free upgrade  
to the one of the new iPhone 17 models. Shop online or come into a store today to take  
advantage of this offer.
```

Final sms message

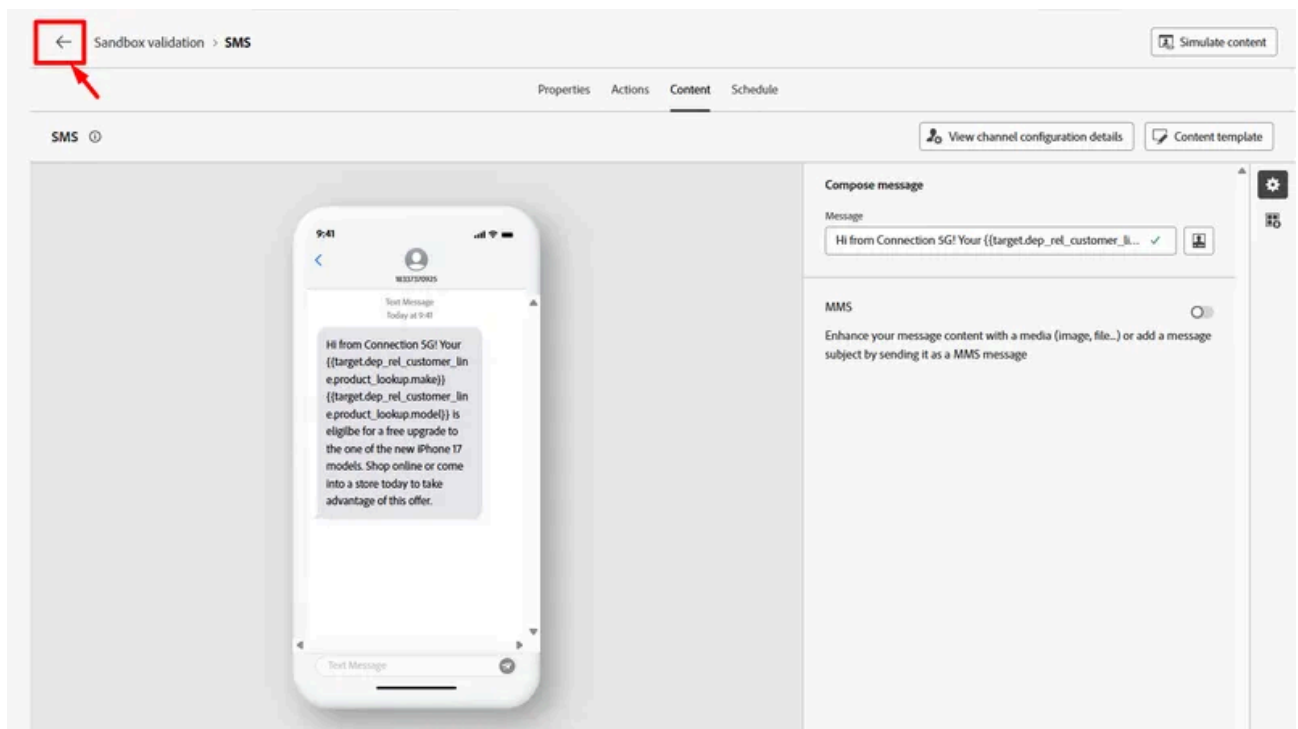
Why are you doing this? Well you want to personalize the message with the customers phone make and model and this information lives within the Customer Line table in the relational store. This demonstrates how you can use data from Orchestrated Campaigns to personalize messages.

4. Click the **Validate** on the editor and make sure there are no validation errors and if good click the **Save** button



Validate and save the message

5. Click on the **back arrow** (←) when you are done to return to the workflow canvas



Return to workflow canvas

Recap

You just created a message and hopefully are now a bit more familiar with how the message editor works. Remember you can personalize using data from the Relational Store but you can also personalize using data from the Real-Time Customer Profile too!

If you use the Real-Time Customer Profile attributes to personalize messages in Orchestrated Campaigns just remember its pulling from the Profile Snapshot dataset in the data lake so attributes can be up to 24 hours. The Profile Snapshot is only updated once a day after the daily batch segmentation job.

4.2.8. Run the Workflow

Objective

In the next few steps you will learn how to test your workflow and more importantly your SMS activity using test mode.

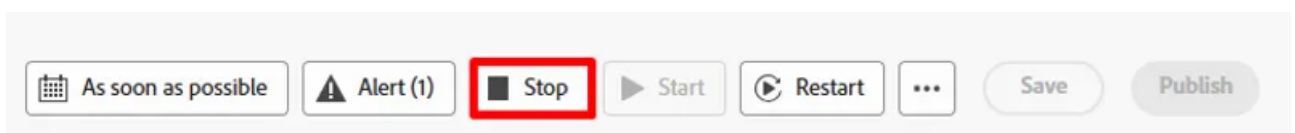
Verify Workflow

1. The final workflow should look something like below when you are done. Double check everything looks good. You should see



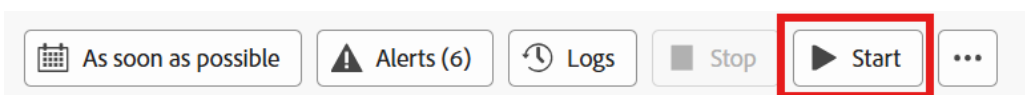
Final workflow

2. If you haven't already stopped your workflow ensure you do so now by clicking the **Stop** button in the upper right.



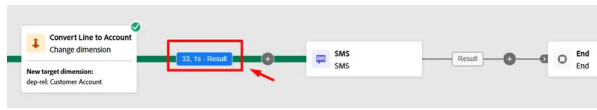
Optionally you can try clicking on the Restart button but its likely you will see an error since you've added activities since the workflow and its cache is no longer valid.

3. Next click the **Start** button to execute and test the workflow end to end



Start the workflow

4. Review the result coming into the SMS activity by clicking on **Result** (there are two Results so use the left one as shown below) and then in the left rail clicking on **Preview results** button.



Transition

Label

Segment code

Results

Preview results

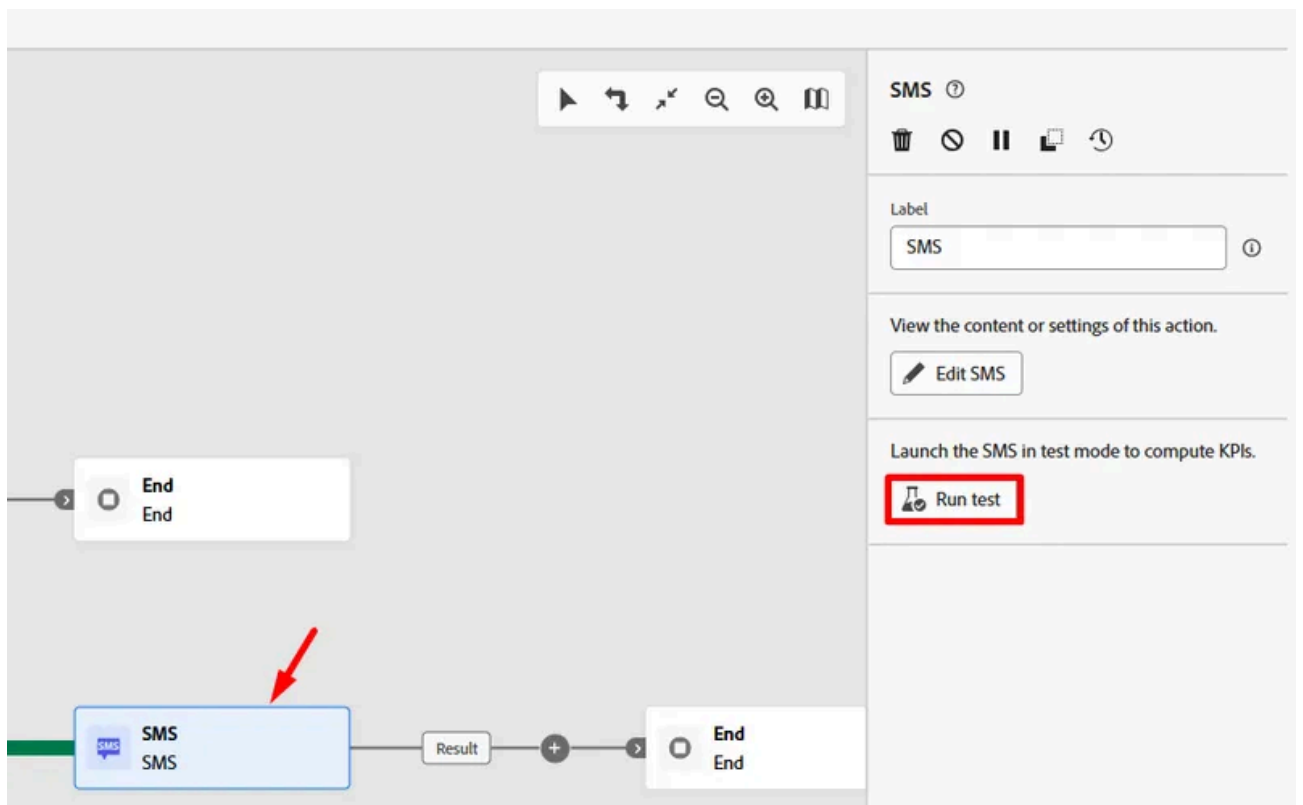
5. You should see **33 records** and the targeting dimension matches the Customer ID (the join key if you will to profile)

Preview results			Close
		29 of 29	
Targeting dimension	Customer ID	Customer Line ID	
11888835	11888835	490122-3	
13098314	13098314	330151-1	
13409372	13409372	182819-3	
13495585	13495585	823269-4	
15052369	15052369	421830-4	
21657939	21657939	480560-3	

Records in the result

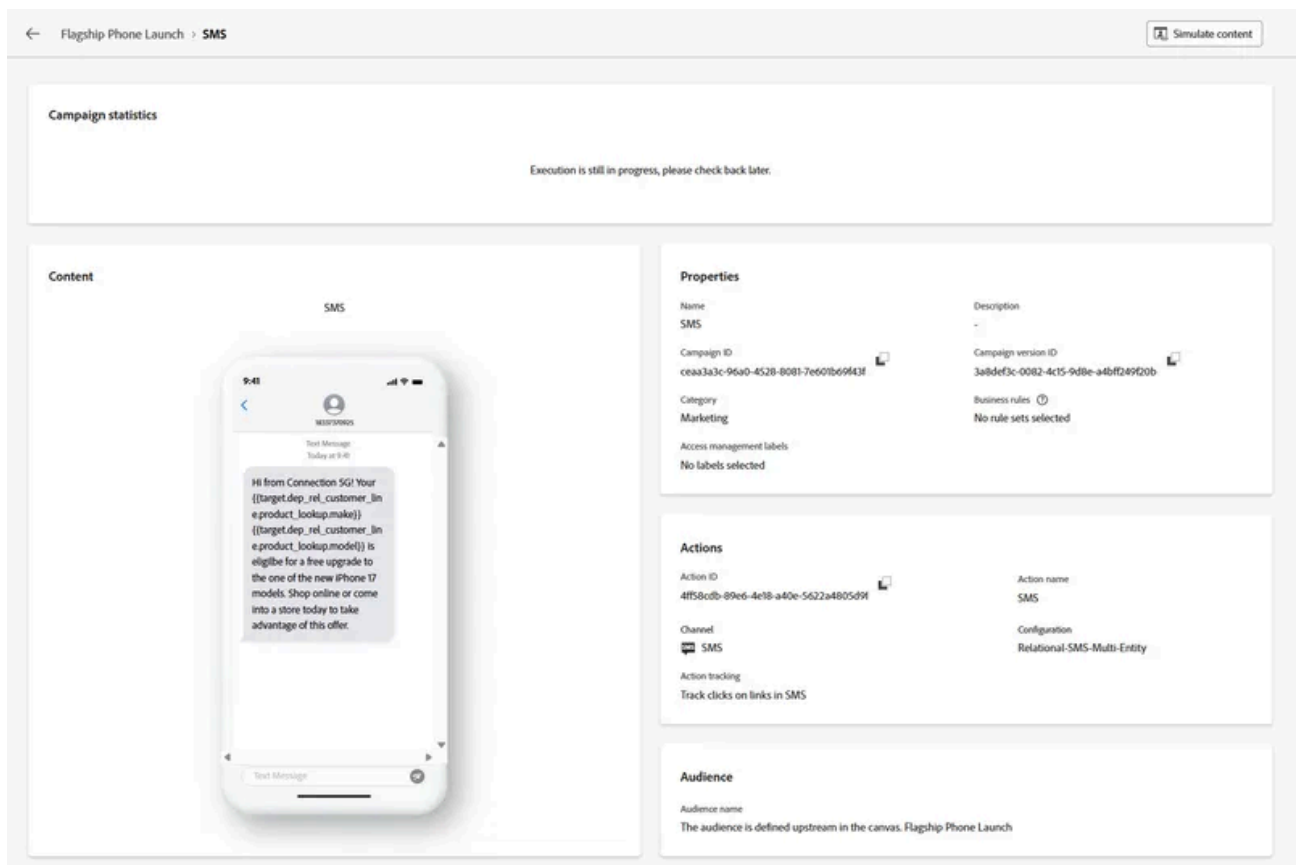
Test the SMS Activity

1. Close out of the previous window and click on the **SMS activity** and then click the **Run test** button in the right rail



Click the Run test on the SMS activity

2. Almost immediately you will see a new button appear labeled **View report**. Click the **View report** button to launch into the report screen.



View report of the SMS activity

This screen will not be populated initially as it takes some time to execute the test run. You may need to refresh a few times before you see results.

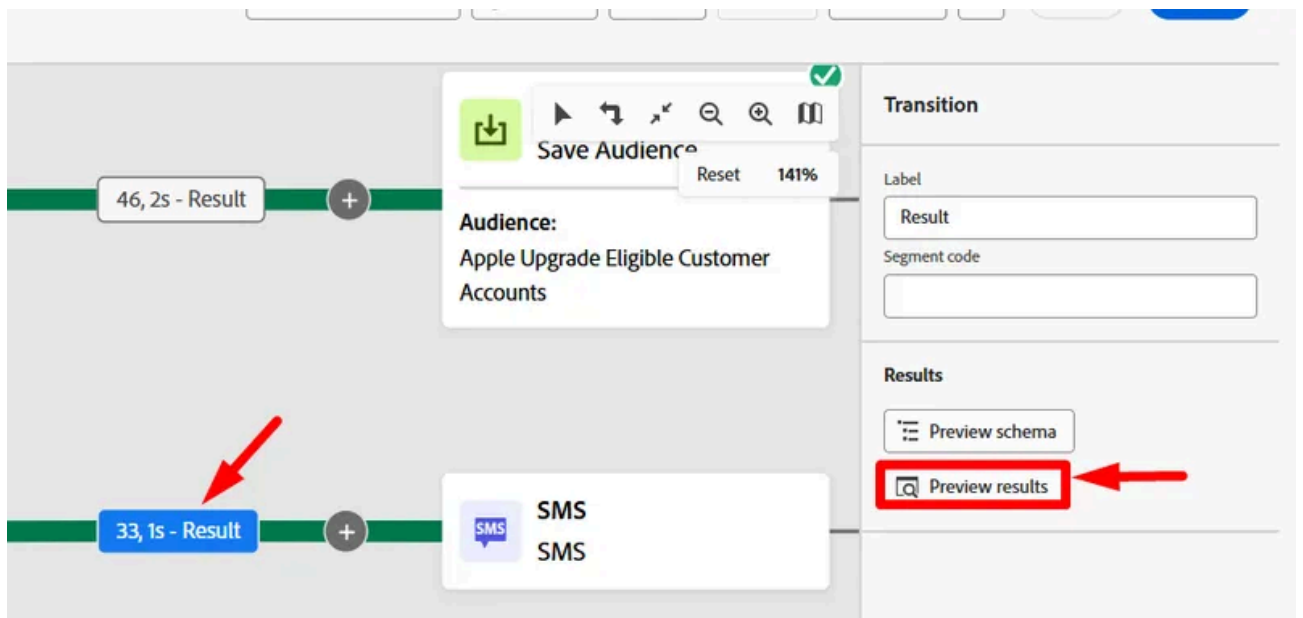
3. When you do get results you should see 100% were targeted!

Campaign statistics			
	100%	0%	0%
	29	0	0
	Targeted	Excluded	Errors

SMS test send results

Wait, a minute...the incoming result was 33 records so where did the 4 go?

4. Go back to the workflow canvas and click on the transition **Result** coming into the SMS activity and then click on **Preview results** in the right rail.



Re-review the transition results

5. In the Preview results screen scroll all the way to bottom of the table and you'll notice that **4 records** have a **blank Targeting dimension**.

Preview results Close

33 of 33

Targeting dimension	Customer ID	Customer Line ID
30710284	30710284	913174-2
35360377	35360377	482484-2
37064463	37064463	860759-4
37938260	37938260	489460-3
41900794	41900794	213699-1
45379997	45379997	904542-2
48217959	48217959	484648-4
49033802	49033802	545226-3
50581674	50581674	471060-3
54737661	54737661	902522-4
63483489	63483489	915604-1
64982803	64982803	420197-2
73864969	73864969	908107-4
74737868	74737868	420786-1
81566803	81566803	905023-2
82672855	82672855	380728-2
86996448	86996448	829149-3
91566010	91566010	971304-1
94956887	94956887	406382-3
		406967-3
		822158-4
		828646-2
		918309-3

4 records missing a targeting dimension

Explanation

So here is what happened.

- You had 33 customer lines that you wanted to send a SMS message
- After the change dimension activity 4 of those customer lines had no associated customer account
- The join to the Real-Time Customer Profile requires you have a Customer ID and since there is none on those 4 records there is no way to lookup a profile or create a new one on the fly

Result → Orchestrated Campaigns drops those 4 records on message execution

There is an enhancement coming to help address this issue in two ways:

1. Make sure an exclusion log is created for records that are missing a targeting dimension on send
2. Update the Change dimension activity to do an inner join vs. external join which would drop those 4 records up front

Congratulations! You are now officially certified to unleash your very own Orchestrated Campaigns and broadcast messages to the world—responsibly, we hope. Go forth and market like a majestic digital wizard!

Publishing the Workflow

You are not going to do this in the lab, but for context here is what happens at publication time:

1. Scheduler kicks in if the campaign has a schedule set
2. Save Audience activities create the audience shell within in the Audience Portal and the qualified profiles start ingesting
3. Message execution starts for the first message activity in the workflow

- Profile lookups occur against the Profile snapshot
 - Matching profiles honor the consent found on the profile
 - Non-matching profiles are created on the fly
- Delivery logs are created in the `AJO Message Feedback Event Dataset`

4.2.9. Summary

Through this lab you did the following activities:

- Built an Orchestrated Campaign using a variety of workflow activities
- Constructed an audience using a Build Audience activity
- Cofingured a messaging channel (SMS to be exact)
- Saved an audience to the audience portal
- Targeted both the customer account and individual lines with email and sms messages

The reason this specific use case was built in Orchestrated Campaigns and not Journeys was because of two primary reasons:

1. The business requirement was ad-hoc audience evaluation and activation
2. The business required notifying both the account holder and the individual lines on the account plan that they can upgrade.

If you had tried this in Journeys you would not have been able to satisfy both those requirements. So, hopefully you now have a solid understanding of what it takes to build an Orchestrated Campaign end to end within Adobe Journey Optimizer.

IF YOU ARE READING THIS IT MEANS YOU ARE AT THE END OF THE LAB.

DO NOT PROCEED, DO NOT PASS GO, DO NOT COLLECT \$200

5. Journeys

5.1. Post-Purchase Excitement

Pre-Requisites

The below labs must have been completed before starting this lab

These labs must have been completed before starting this lab:

- **Data Stores -- Relational Store in Action → [Profile Target Dimension](#)**
- **Data Stores -- Configure Email Channels → [Configure for Profile](#)**
(this can take up to 3hrs to complete)

If you have not done so please complete these now

Learning Objectives

- Build a Journey that starts with a unitary event
- Setup and configure a custom action to call to 3rd party system to return information used in a Journey
- Execute a journey by streaming in a event payload
- Test and debug profiles and Journeys
- Validate the intended experience through reporting and logs
- Setup personalization in a simple email and see it in action

Use Case Description

When a customer places an order, you want to send a confirmation message with order details. Once the order is shipped, you want to trigger a second message with tracking information retrieved dynamically from a 3rd-party API.

Key callouts:

- The initial order placed would typically be implemented as transactional message as people don't want to wait around for a confirmation they just order something.
- The order shipped notification could also be implemented using transactional messaging but could be built in a journey allowing for a custom action to retrieve shipping information and enhancing the customer communication

In this lab you will only build out the Order Shipped message and skip the Order Confirmation message.

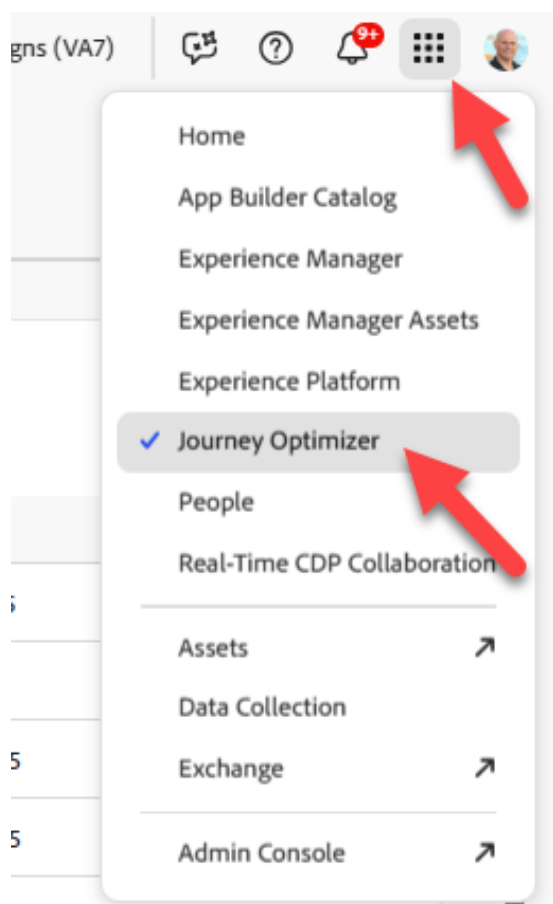
5.1.1. Configure Event

Learning Objective

Create and configure an event that will trigger a customer journey when the post-purchase action (order shipped) occurs.

Navigate to Journey Optimizer

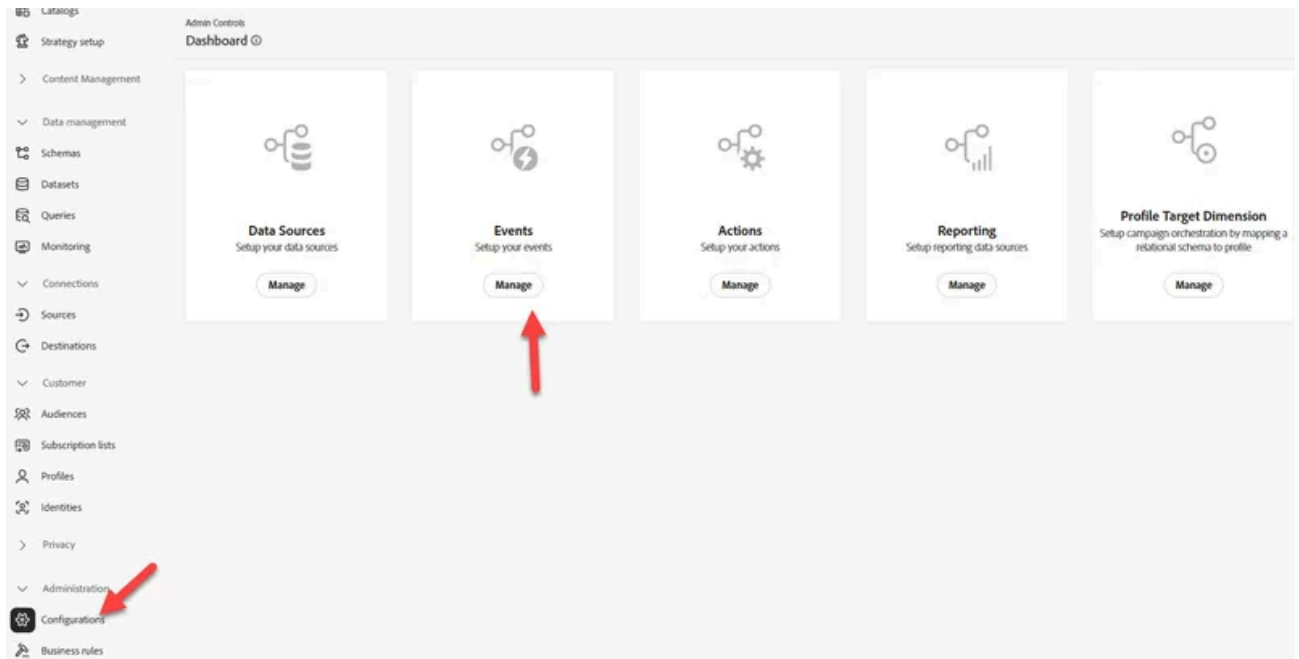
In the upper right hand corner of your browser click on the **Cube** and then select **Journey Optimizer**



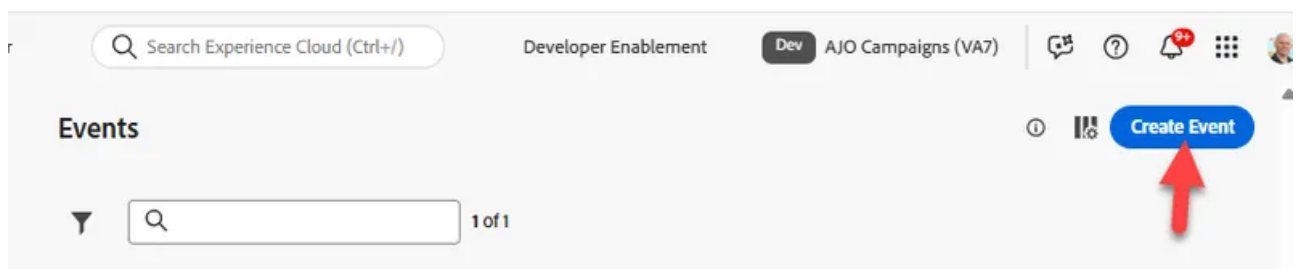
Configure Order Shipped Event

In order to create a Journey that uses a Unitary Event, we need to first configure the event.

1. In the left rail under the Administration menu click to **Configurations** and then on the Events tile click the **Manage** button



2. In the upper right click the **Create Event** button



3. Update the settings of the event as follows:

- **Name** = orderShipped
- **Type** = Unitary
- **Event Id type** = Rule based
- **Schema** = dep: Orders v.1

Name * ⓘ
orderShipped

Author
Danny Miller

Created
11/12/2025, 10:35:23 AM

Description

Type * ⓘ
Unitary

Event id type * ⓘ
Rule based

Used in ⓘ
0 journeys

Parameters

Schema * ⓘ
dep: Orders v.1

4. In the **Fields** input box click on the **Pencil icon**

Parameters

Schema * ⓘ
dep: Orders v.1

Fields * ⓘ
3 fields selected

5. Select the following fields to add to the event and when done click the **OK** button

- Event Type (eventType)
- Order ID (orderId)

Fields

Search: All ⓘ 5 fields selected

Identifier (_id)	☒
> Billing Details (billing)	☐
ExperienceEvent merge ID (eventMergeld)	☐
Event Type (eventType)	☒
> identityMap	☐
Order (order)	☒
> _dep	☐
Order Date (orderDate)	☐
Order ID (orderId)	☒
> Payment Details (payment)	☐
Price Total (priceTotal)	☐

Ensure you only select the Order ID field and not all the fields in the Order ☹️

6. In the `Event Id condition input`, click on the **Pencil icon**

Parameters

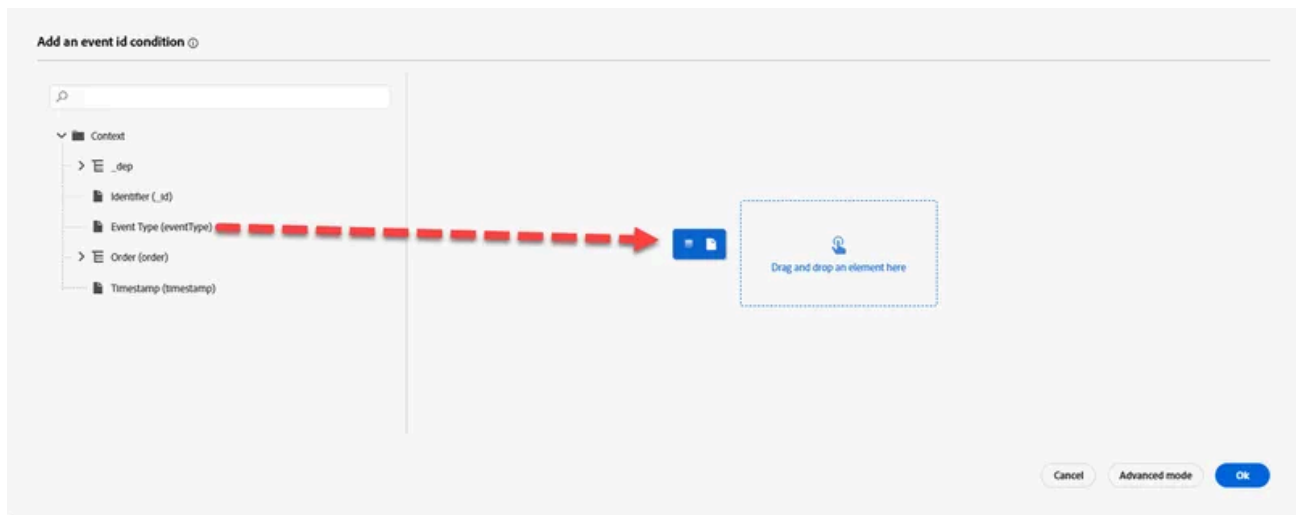
Schema * ⓘ
dep: Orders v.1

Fields * ⓘ
5 fields selected

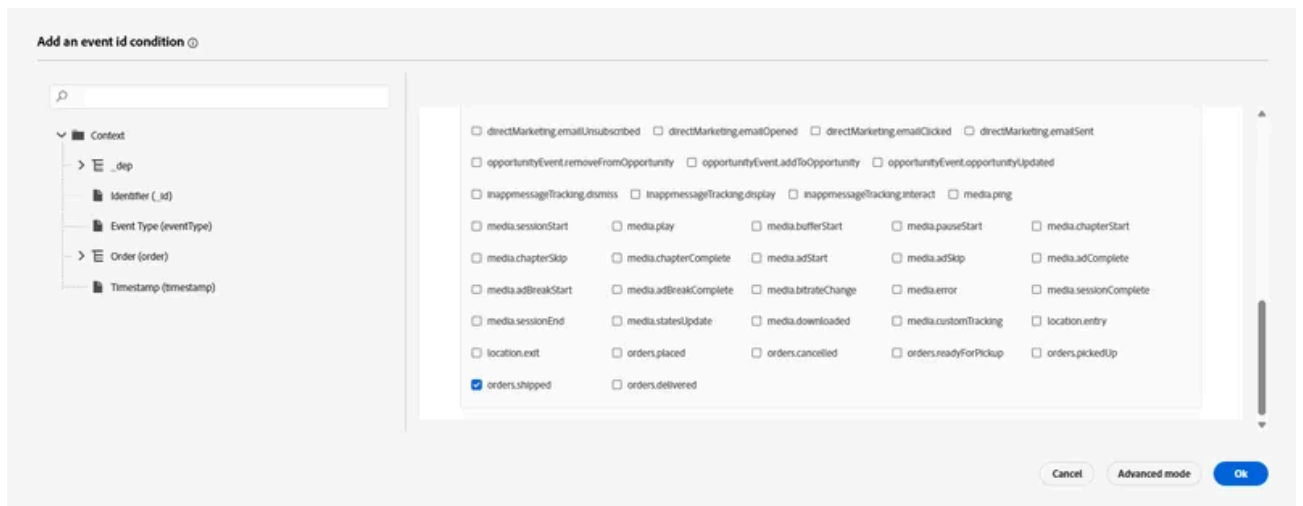
Event Id condition * ⓘ

The Event Id condition field is required.

7. Drag the **Event Type** field onto the canvas

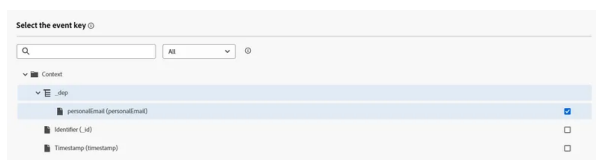


8. In the selection box that appears look for and check the value titled **orders.shipped**. Then click the **OK** button.

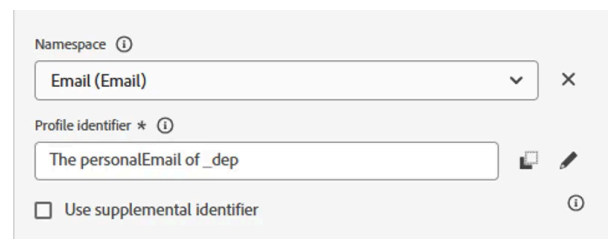


9. Next update the last two values of Namespace and Profile Identifier with the values shown below:

- **Namespace** → **Email**
- **Profile Identifier** → **personalEmail**



Selection of profile identifier



Final configuration

What is the Namespace and Profile Identifier used for?

For any journey that uses an event you must specify for that event what identity namespace and associated profile identifier should be used to lookup the profile. It's important to understand that choosing one identity over another can impact how the journey will work.

Quick Example:

Event payload is a page view containing identities like so: ECID (primary identity) & Customer ID (optional)

- ECID chosen → it's likely this is the first time identity service has seen this relationship so when journey's receives this event it will attempt to lookup the profile using the ECID and fail to find a profile. Why? The relationship doesn't exist yet between ECID and Customer ID and the traits of the profile are likely stored against the known identifier Customer ID
- Customer ID chosen → this identity is not required to be populated and it's likely on most page views it would be empty. Therefore, if this identity was chosen the only time a Journey would fire is when there is an authenticated page view where the Customer ID is set.

Short is there is no right answer just tradeoffs you need to make based on the use case 😊

Final orderShipped Event Configuration

Verify your final event configuration matches below. If everything looks good click the **Save** button

Name * ⓘ
orderShipped

Author
Danny Miller

Created
12/23/2025, 11:43:12 AM

Description

Type * ⓘ
Unitary

Event Id type * ⓘ
Rule based

Used in ⓘ
0 journeys

Parameters

Schema * ⓘ
dep: Orders v.1

Fields * ⓘ
5 fields selected

Event Id condition * ⓘ
In(the eventType, ['orders.shipped'])

Namespace ⓘ
Email (Email)

Profile Identifier * ⓘ
The personalEmail of _dep

☐ Use supplemental identifier ⓘ

You've configured your first AJO event. High-five yourself!

Recap

A configured order shipped event in Adobe Journey Optimizer that can be used as the entry point for a journey

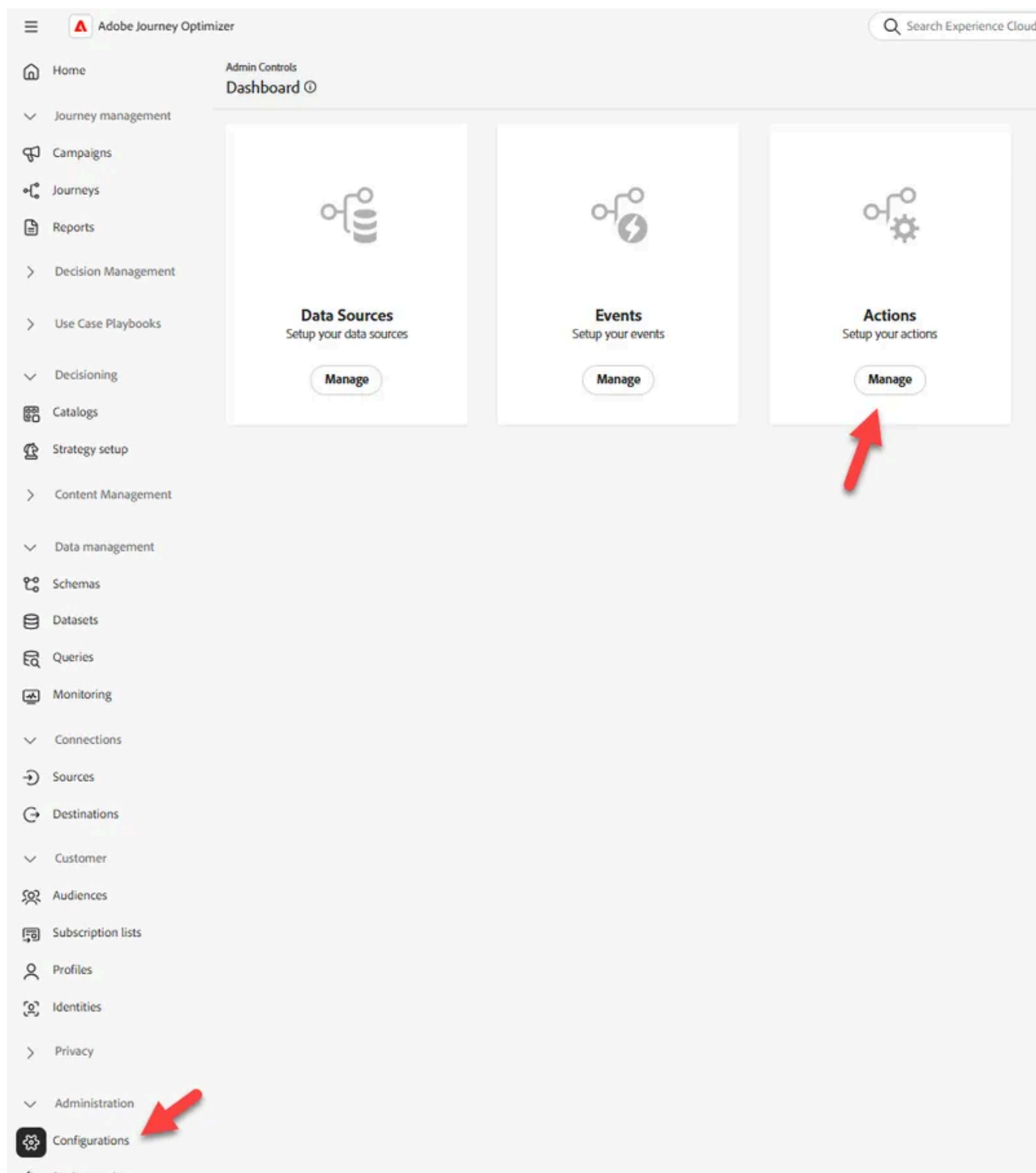
5.1.2. Configure Custom Action

Learning Objective

Create a custom action that defines how the journey will communicate with an external endpoint or service to get an ETA for when the package will arrive.

Navigate to Actions

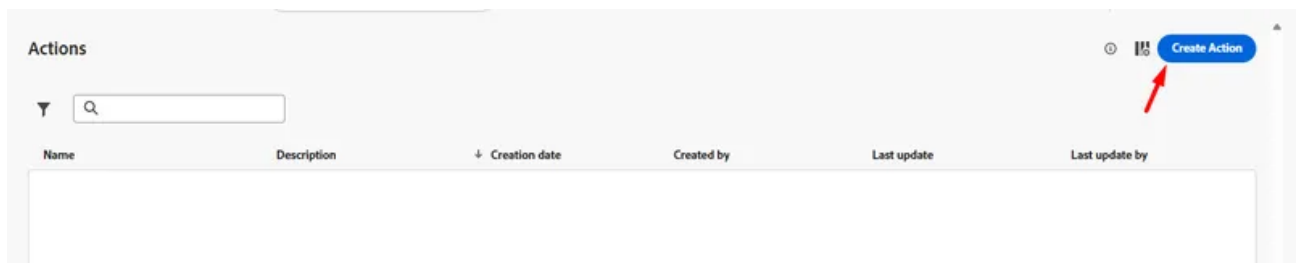
In the left rail under the Administration menu click to **Configurations** and then on the Actions tile click the **Manage** button



Configure the Action

Action Name & Details

1. In the upper right click on the **Create Action** button



Create a new action

2. In the configuration panel that appears update the following basic values as shown below:

- **Name:** GetShippingDetails
- **Description:** Call third party to get Shipping ETA and Tracking Number
- **Action Type:** Custom
- **Channel:** Email
- **Required marketing Action:** Email Targeting

Name * ⓘ

GetShippingDetails

Author

Eric Knee

Creation date

1/21/2026, 4:20:20 PM

Description

Call third party to get Shipping ETA and Tracking Number

Action ID

f4ea5caf-758f-4f05-ac4c-89f4f240263e

Used in ⓘ

0 journeys

Action type * ⓘ

Custom

Access and privacy configuration

Channel * ⓘ

Email

Required marketing action *

Email Targeting

Endpoint Details

In the Endpoint configuration area provide the following details:

- **Endpoint URL:** `https://api.mockaroo.com/api/67077bb0?count=1&key=a0dbce20`
- **Method:** `GET`
- **Headers:** *leave as-is*
- **Query parameters:**
 - **Name:** `orderid`
 - **Type:** `variable`

A variable allows for us to pass in a value during a journey vs having a static value for all journeys

- **Authentication Type:** `No Authentication`

Endpoint configuration

URL * ⓘ

https://api.mockaroo.com/api/67077bb0?count=1&key=a0dbce20

Method ⓘ

GET

Headers

▼ HEADER 1

Label *

Content-Type

Type *

Constant

Value * ⓘ

application/json

▼ HEADER 2

Label

Charset

Type

Constant

Value

UTF-8

+ Add a header field

Query parameters

▼ QUERY PARAMETER 1

Name *

orderid

Type *

Variable

+ Add a query parameter field

Authentication

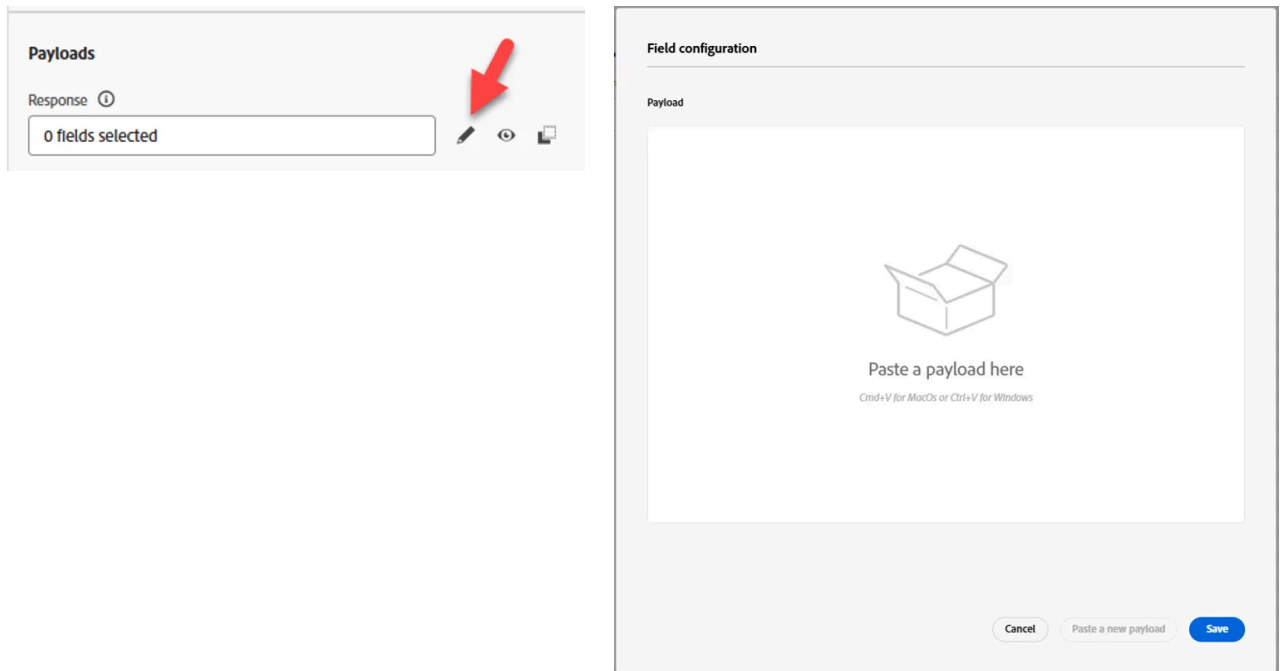
Type ⓘ

No authentication

Response Payload Details

Now you need to provide a sample payload so the action knows what the response payload should look like.

1. In the Payloads area click on the **Pencil icon** to open the Field configuration screen

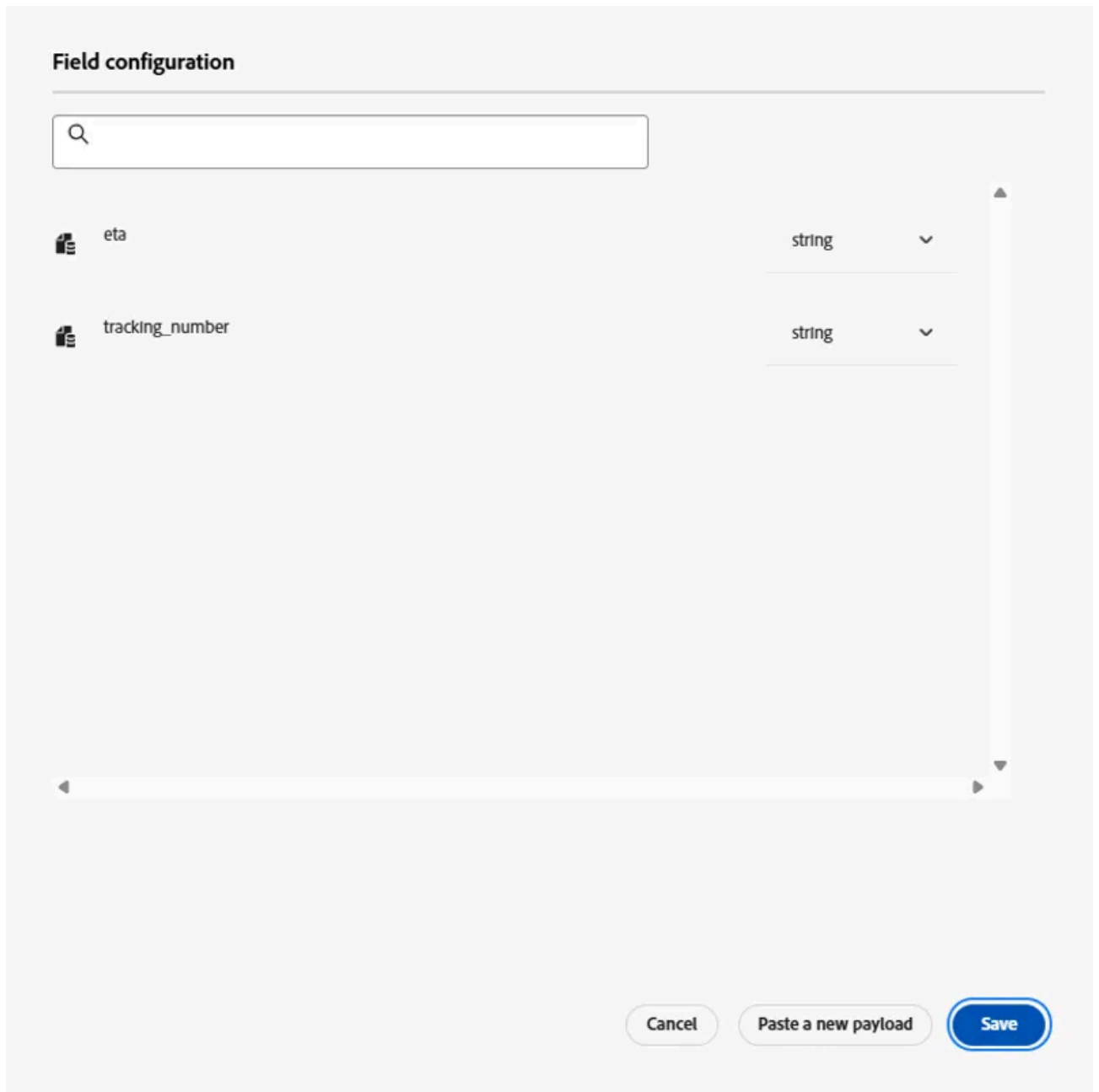


2. **Copy and paste** the below payload into the Payload box

```
{  
  "eta": "11/19/2025",  
  "tracking_number": "072000326"  
}
```

This is the same JSON structure the mockaroo endpoint we use above should return:

3. The response payload will display. Click the **Save** button.



The image shows a 'Field configuration' interface. At the top, there is a search bar with a magnifying glass icon. Below it, there is a list of fields. Each field has a small icon to its left, followed by the field name, and then a data type dropdown menu. The fields listed are 'eta' and 'tracking_number', both with a data type of 'string'. At the bottom right of the interface, there are three buttons: 'Cancel', 'Paste a new payload', and 'Save'.

Field Name	Data Type
eta	string
tracking_number	string

You can leave everything as a string but in real-life you would probably want to update this to match the data type

Test the Action

1. Click the **Send test request** button in the bottom right rail to validate you didn't mess anything up 😊

Authentication

Type ⓘ

No authentication ▼

Payloads

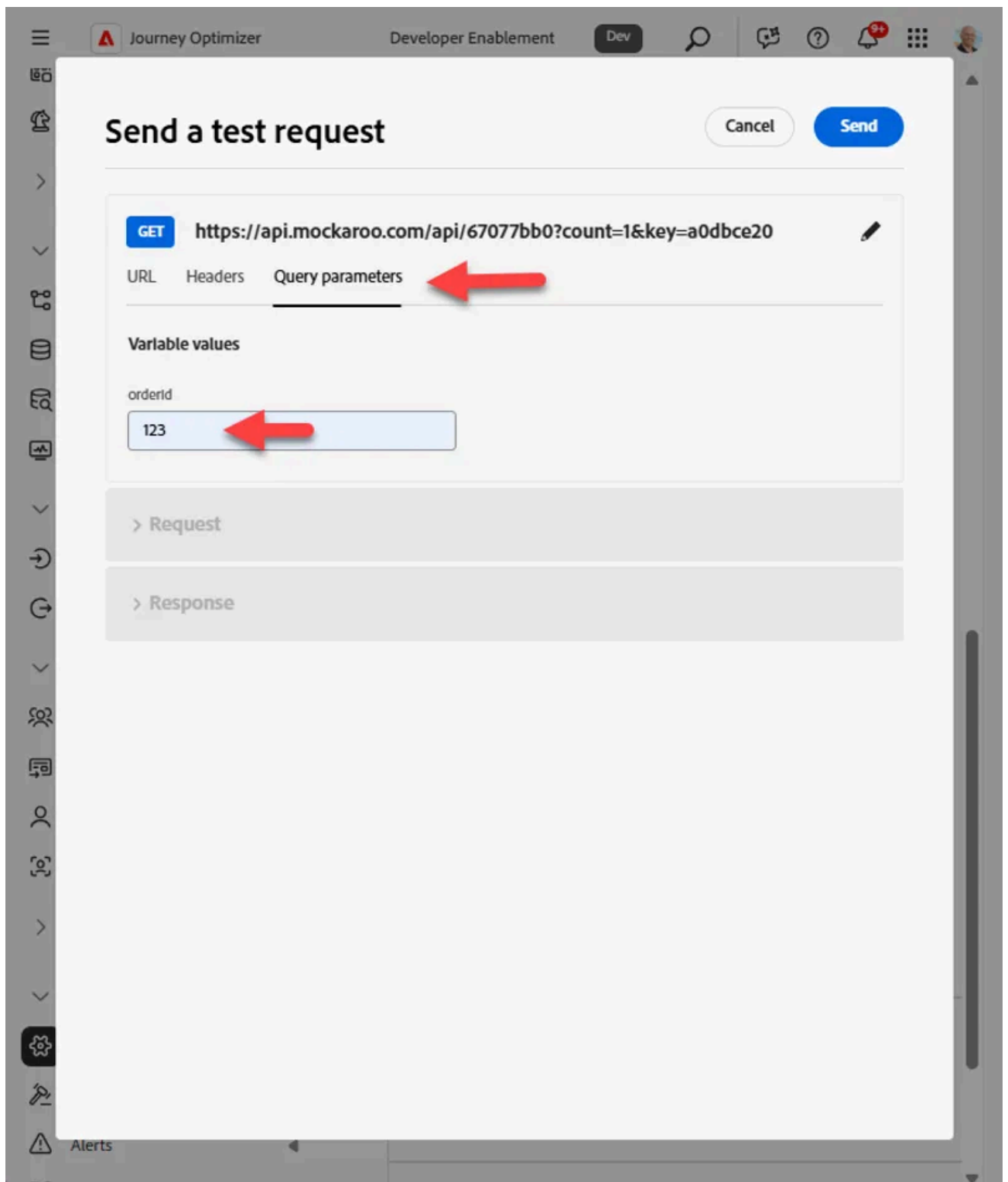
Response ⓘ

2 fields selected

👁️ 📄

Send test request

2. Click on the **Query parameters** tab and update the value for `orderId` to **123**



3. Click the **Send button** and if all works out well you should see a response code of 200 and a Preview of the payload as shown below...

Send a test request

GET

https://api.mockaroo.com/api/67077bb0?count=1&key=a0dbce20

Request

Response

HTTPCode

200

Headers

Date	Content-Type	Transfer-Encoding	Connection	Server
Wed, 21 Jan 2026 23:04:38 GMT	application/json	chunked	keep-alive	cloudflare
Nel	X-Frame-Options	X-XSS-Protection	X-Content-Type-Options	X-Download-Options
{"report_to":"cf-nel","success_fraction":0.0,"max_age":604800}	SAMEORIGIN	1; mode=block	nosniff	noopen
X-Permitted-Cross-Domain-Policies	Referer-Policy	Access-Control-Allow-Origin	Access-Control-Allow-Methods	Access-Control-Max-Age
none	strict-origin-when-cross-origin	*	POST, GET, OPTIONS, PATCH, PUT, DELETE	1728000
Access-Control-Allow-Headers	Content-Disposition	Last-Modified	Cache-Control	X-Request-Id
X-Requested-With, X-Prototype-Version, Content-Type	attachment; filename="ShippingDetails3rdParty.json"	2026-01-21 23:04:38 +0000	max-age=0, private, must-revalidate	bat56acc-2b60-4a08-9662-bf8ce2e747b7
X-RunTime	cf-cache-status	Server-Timing	Report-To	Content-Encoding
0.290169	DYNAMIC	cfEdgeDur=13,cfOriginDur=592	{"group":"cf-nel","max_age":604800,"endpoints":gzip [{"url":"https://a.nel.cloudflare.com/report/v4?s=3l89mg%2BnjTH4jv0m5s%28KQWMy5N%2F8noxkDLWOrYKS5ev%2FgeAazwGmorgmDVWNAufauT5tHW4gkT25X0OUh%2Fv%2FjeOd6EjUEnap82nWM%3D"}]}	
CF-RAY	alt-svc			
9c1a73a668e00798-IAD	h3=">443"; ma=86400			

Preview

```

{
  "eta": string "2/2/2026",
  "tracking_number": string "311981562"
}

```

```

{
  "eta": string "12/26/2025",
  "tracking_number": string "063112249"
}

```

If you are not seeing a 200 response or a Preview do not continue. Raise your 🙋 to get some help.

- Click the **Cancel** button to go back to the Action screen and then scroll back up in top right rail and click the **Save** button

Congrats! Your Custom Action is live, thanks to your expert-level Ctrl+C, Ctrl+V skills.

Recap

A reusable custom action configured in Adobe Journey Optimizer that takes an Order Id and returns the ETA and Tracking Number

5.1.3. Build Journey

Learning Objective

Create a unitary journey that begins with the configured Order Shipped event, gets the ETA from an external service and sends an email.

Create Journey

Go to **Journeys** and click **Create Journey - Create from scratch**



Journey Properties

1. Update the Journey Properties in the right rail with the following:

- **Name:** Order Shipped Journey
- **Description:** Notify customer that order has shipped. Include shipping details.
- **Tags:** Default
- **Journey metrics:** leave blank

Empty Drop Down?

Don't worry and move on. The very first journey created in a sandbox needs to "prime the pump". Once we publish the journey, this drop down will have options to choose from.

- **Allow reentrance:** checked
- **Reentrance wait period:** 5 minutes
- **Access labels:** leave blank
- **Time Zone:** Your Local timezone
- **Use Profile time zone in waits and conditions:** NOT checked
- **Start/End Date:** leave blank
- **Timeout or error:** 30
- **Capping rules:** leave blank
- **Priority:** 0

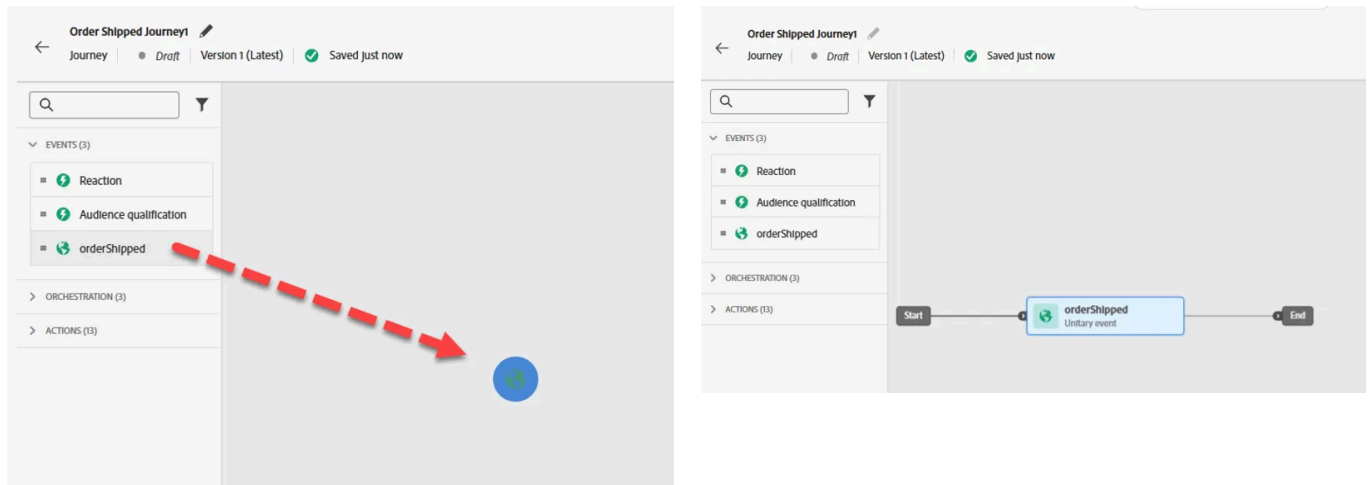
The screenshot shows the 'Journey Properties' configuration panel on the right side of a user interface. At the top, there are icons for deleting and refreshing, along with 'Cancel' and 'Save' buttons. The panel is divided into several sections:
1. **General Information:** Includes fields for 'Name' (set to 'Order Shipped Journey'), 'Description', 'Tags' (set to 'Default'), and 'Journey metrics'. There is also a button for 'Email Opens (AJO)'.
2. **Configuration:** This section contains several settings:
- 'Entrance' with an information icon.
- 'Allow reentrance' checked with a checkbox.
- 'Reentrance wait period' set to '5' minutes.
- 'Access management labels' showing 'No labels selected' with a plus icon to add labels.
- 'Time zone' set to 'America/Los_Angeles, Pacific Time, -0...'.
- 'Profile time zone' with a checkbox for 'Use Profile time zone in waits and conditions' which is unchecked.
- 'Start date' and 'End date' fields, both with calendar icons and 'x' icons to clear the selection.
- 'Timeout or error' set to '30' seconds.
3. **Conflict management:** Includes 'Capping rules' set to 'Select rule set', 'Priority' set to '0', and a button to 'View potential conflicts'.
At the bottom of the panel is a button labeled 'Copy technical details'.

2. If everything looks good click the **Save** button

Journey Canvas

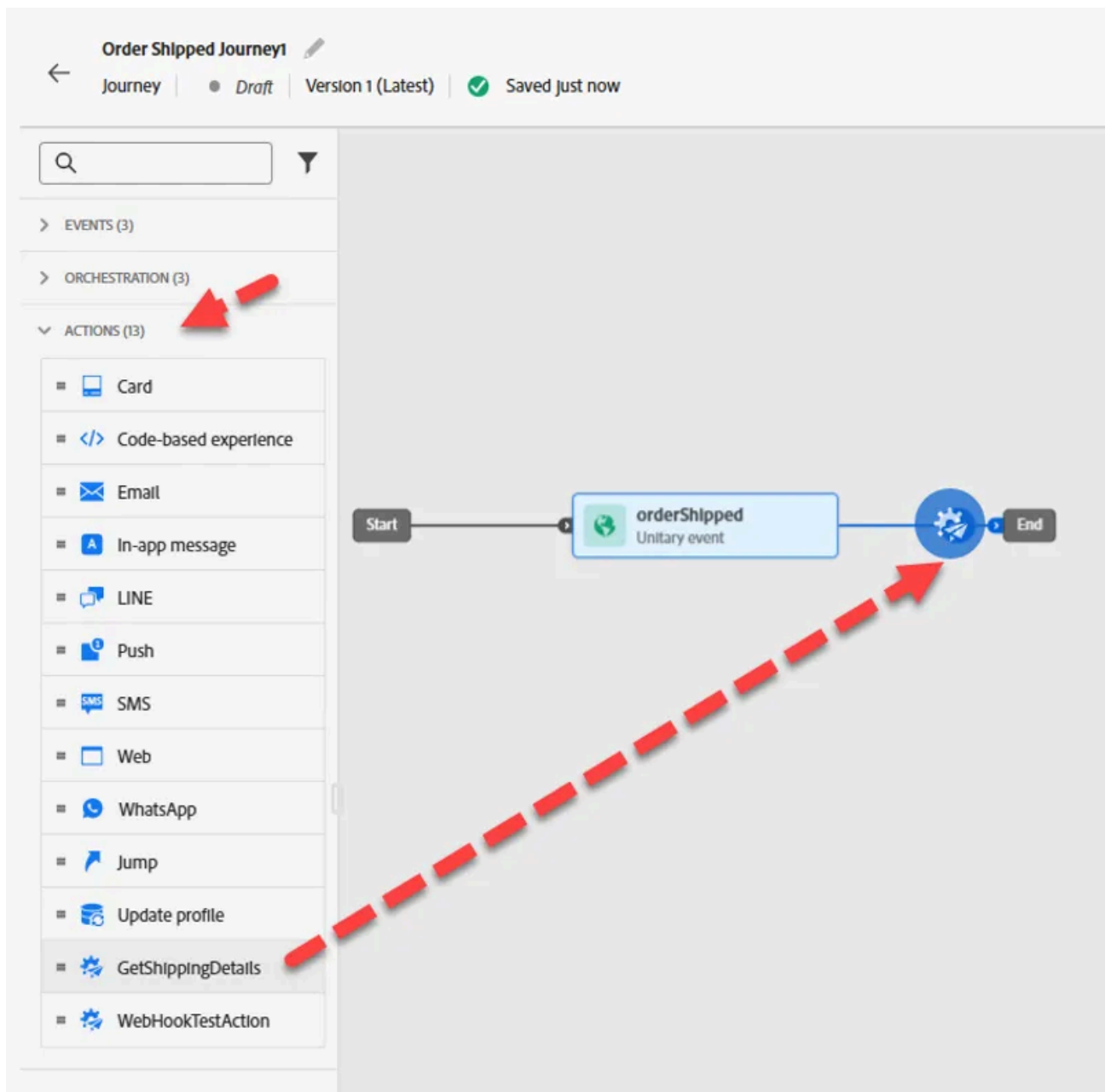
Add a Unitary Event

From the left pane under the **Events menu** drag 'n drop the **orderShipped** event onto the canvas as shown below

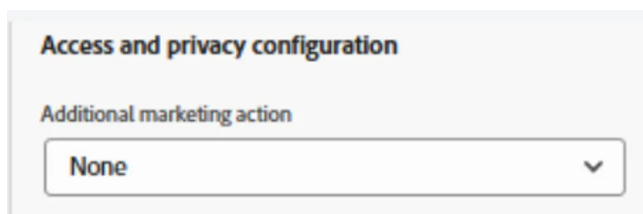


Add a Custom Action

1. If the left pane expand the **Actions menu** and then drag 'n drop onto the canvas the action you built named **GetShippingDetails** after the orderShipped event



2. In the right rail, under Access and privacy configuration → Marketing Action dropdown ensure the value is set to **None**



3. Under the Endpoint configuration → Query Parameters menu click on the **Pencil icon** next to orderid

Access and privacy configuration

Additional marketing action

None ▼

Endpoint configuration

Dynamic path

▼ Query parameters

orderid * ⓘ



4. In the modal that appears expand **Context** → **orderShipped** → **Order** and then select **Order ID (orderId)** and click **OK**

Select orderid source ⓘ

ⓘ

- ▼ Context
 - ▼ orderShipped
 - > _dep
 - Identifier (_Id) ☐
 - Event Type (eventType) ☐
 - ▼ Order (order)
 - > _dep
 - Order Date (orderDate) ☐
 - Order ID (orderId) ☒
 - > Payment Details (payment)
 - Price Total (priceTotal) ☐

5. Back in the right rail, ensure the option for Timeout or error is **unchecked** and then click the **Save button**

Actions: GetShippingDetails

Cancel

Save

Label

Description

Call third party to get Shipping ETA and Tracking Number

Access and privacy configuration

Additional marketing action

None

Endpoint configuration

Dynamic path

Query parameters

orderid *

The orderID of order

Timeout or error

☐

Add an alternative path in case of a timeout or error

Consent policies

Refresh policies

Add Email Action

1. Under the Actions menu drag 'n drop the **Action** action onto the canvas after the GetShippingDetails action



1. Select **Email** for the marketing action, then **Add**.

Select action type ⓘ

Marketing

- ☐ Card
- ☐ </> Code-based experience
- ☐ Direct mail
- ☒ Email
- ☐ In-app message
- ☐ LINE
- ☐ Push
- ☐ Mobile message
- ☐ Web
- ☐ WhatsApp

- ☐ Multi-action

Cancel Add

1. In the right rail, click **Configure action**

Actions: Emailⓘ

CancelSave

Label

ID

ffb9c818-b3c3-458d-83d8-48028b3e011c



 **Configure action**



Optimization

Not added

Multilingual

Not added

Timeout or error

☐ Add an alternative path in case of a timeout or error

1. set **Email channel Configuration** to `Profile-Email` and then click on **Edit Content**

Actions



Email

Action name

Email

Email channel configuration * ?

Profile-Email



Relational-Email

Profile-Email



Edit content



Add Email Body Content

For content, you are going to keep things simple. Like stupid simple.

1. Update the Subject line to **Order Shipped** and then click on the **Edit email body** button

View configuration details

Content template

Header

From name
AJO Campaigns

From email
ajo-campaigns@email.dep-labs.com

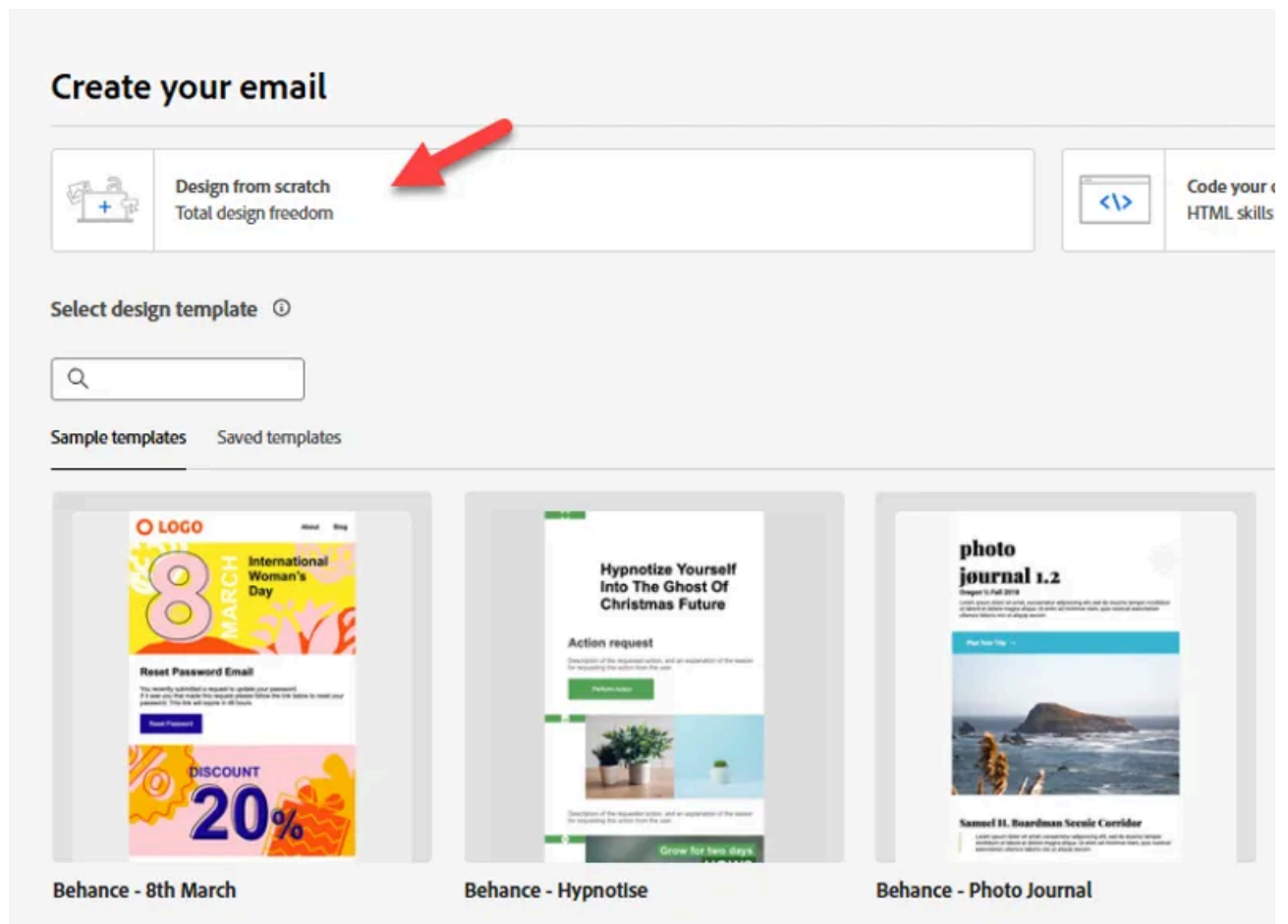
Subject line

Body

Use the Email Designer for visual editing or uploading HTML

Edit email body

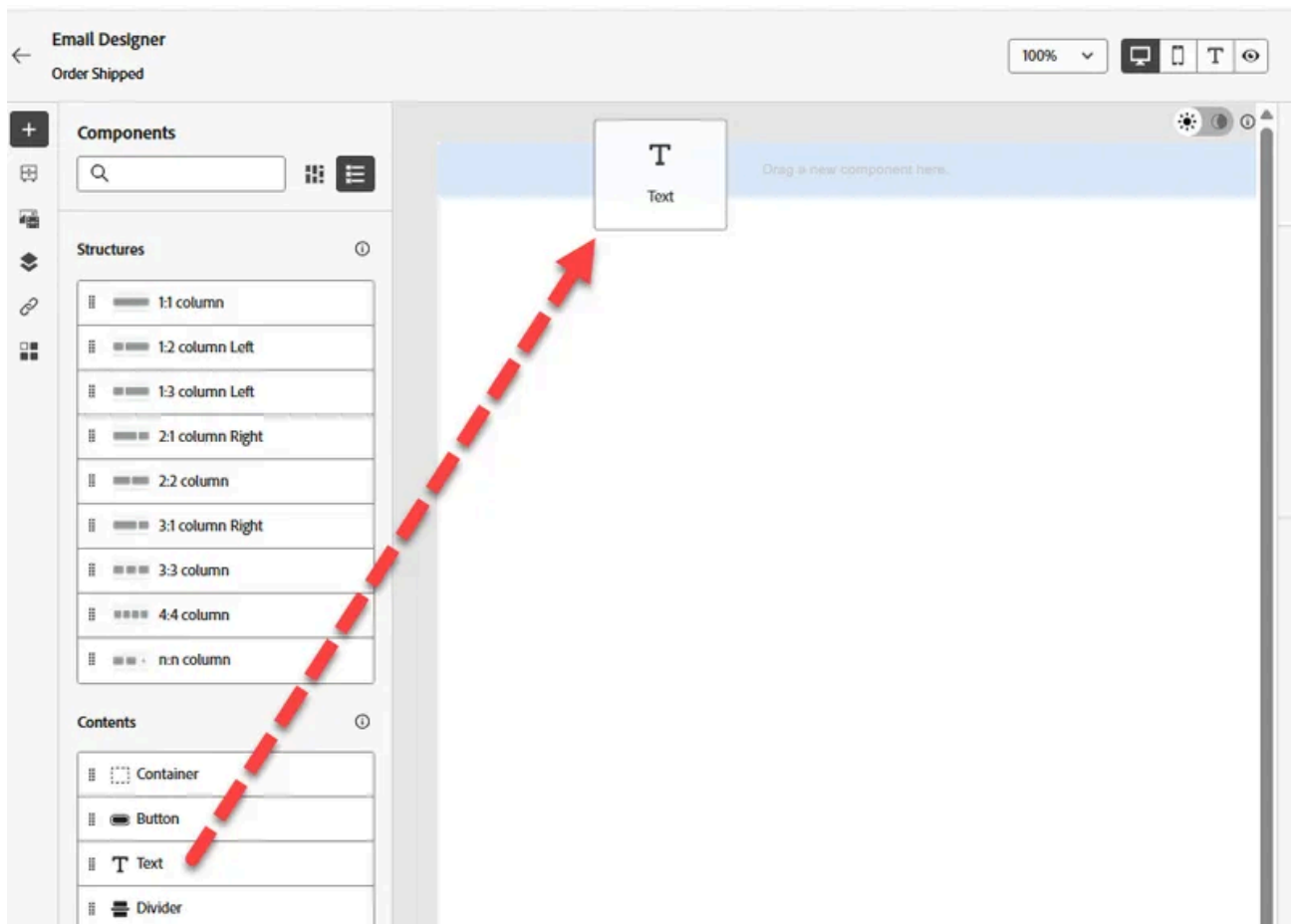
2. In the top bar click on the **Design from Scratch** content block



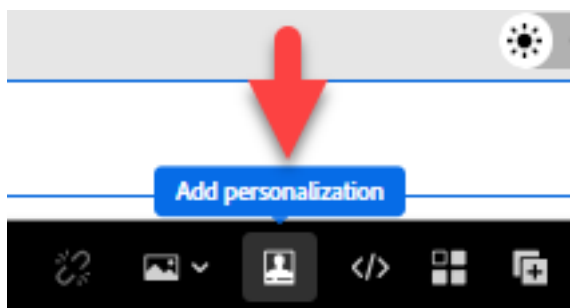
- From the left bar under the Structure container drag 'n drop the **1:1 Column** onto the canvas



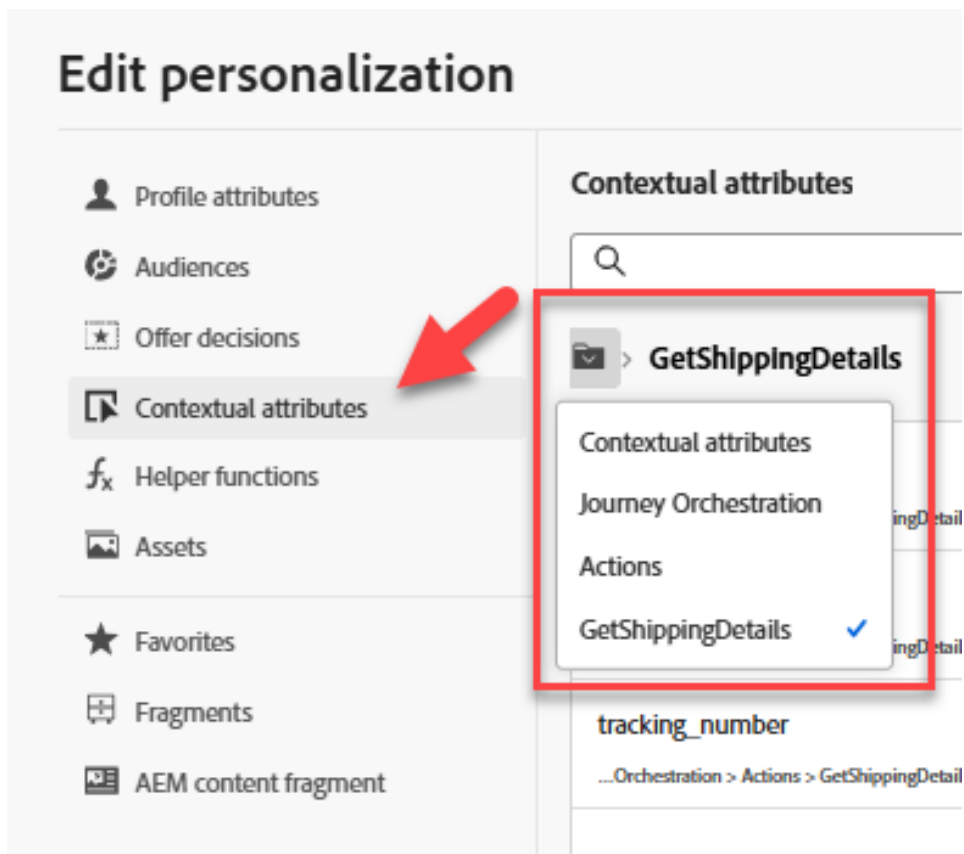
- Then under the Contents container drag 'n drop the **Text** component into your **1:1 Column**



5. Click into the Text component and **delete the current text** and then click the **Add Personalization** icon



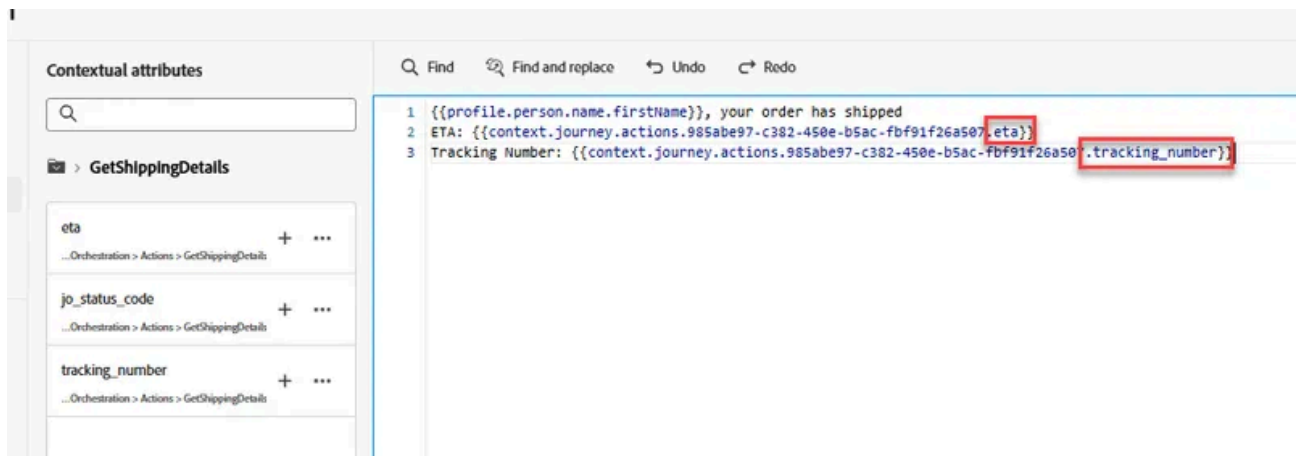
6. In the left rail click on the **Contextual Attributes** folder and then navigate thru **Journey Orchestration** → **Actions** and select **GetShippingDetails**



7. In the main body of the email now **copy & paste** the below JSON into the Personalization **editor**

```
{{profile.person.name.firstName}}, your order has shipped  
ETA:  
Tracking Number:
```

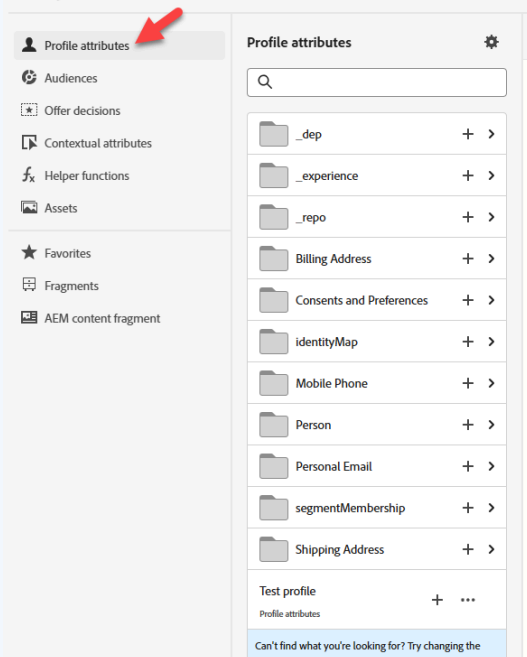
8. Add the personalization fields as follows (**click the plus '+' sign next to the field on the left rail**):
- **ETA:** eta
 - **Tracking Number:** tracking_number



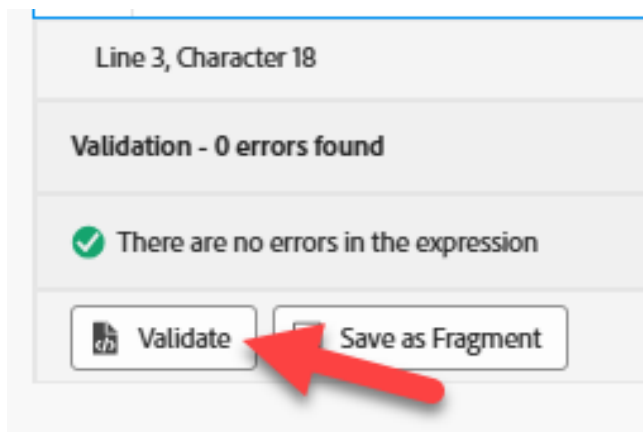
Click the **+** symbol to add personalization attributes from the rail to the canvas. It will place them where your cursor is so ensure you are "lined up" appropriately

Your email will use a combination of context attributes (ETA & tracking number) and Profile attributes (first Name). If you wanted to add other Profile attributes, you can click on the Profile Attributes tab and select anything you see.

Edit personalization

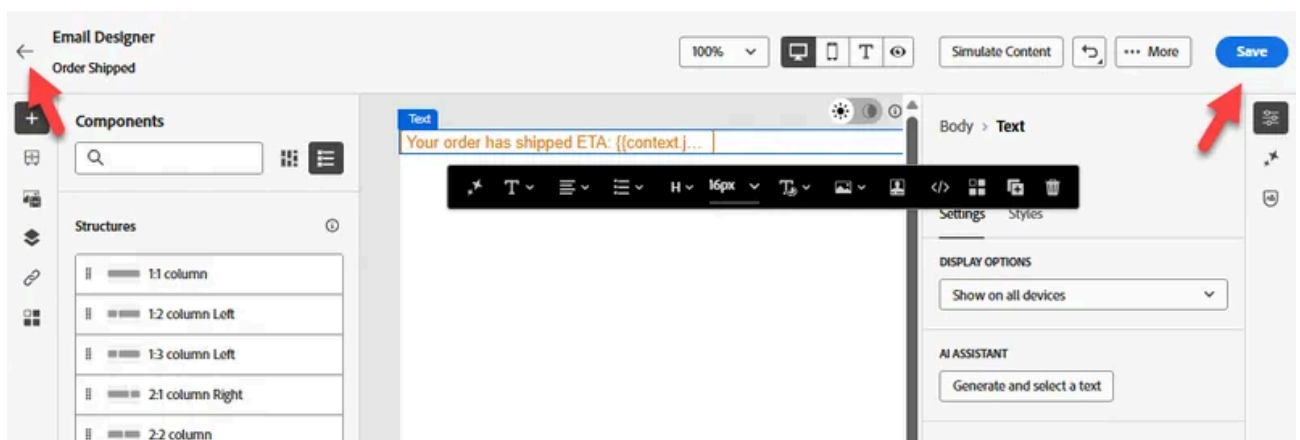


9. On the bottom of the screen click the **Validate** button and ensure you have no errors

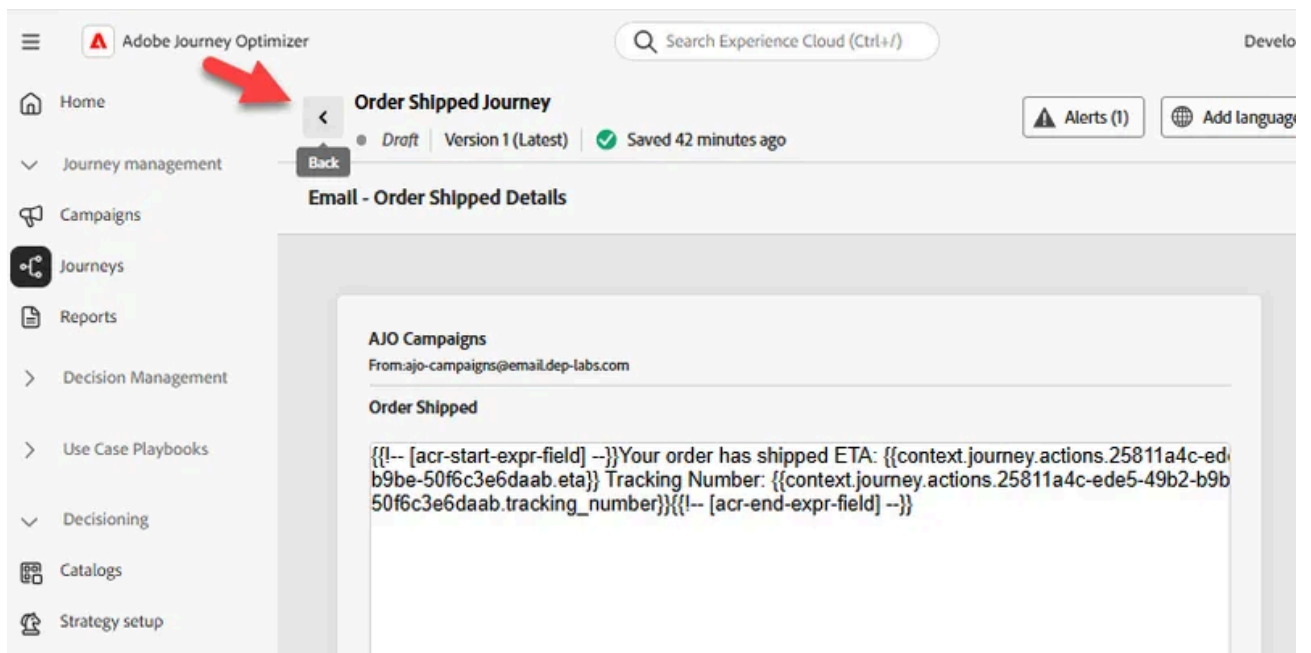


10. If everything looks good click the **Save button** in the top right

11. Then click the **Save** button again in the top right and click the **← left arrow** in the top left



12. Finally, click the **< Back icon** in top left to get back to the Journey Canvas

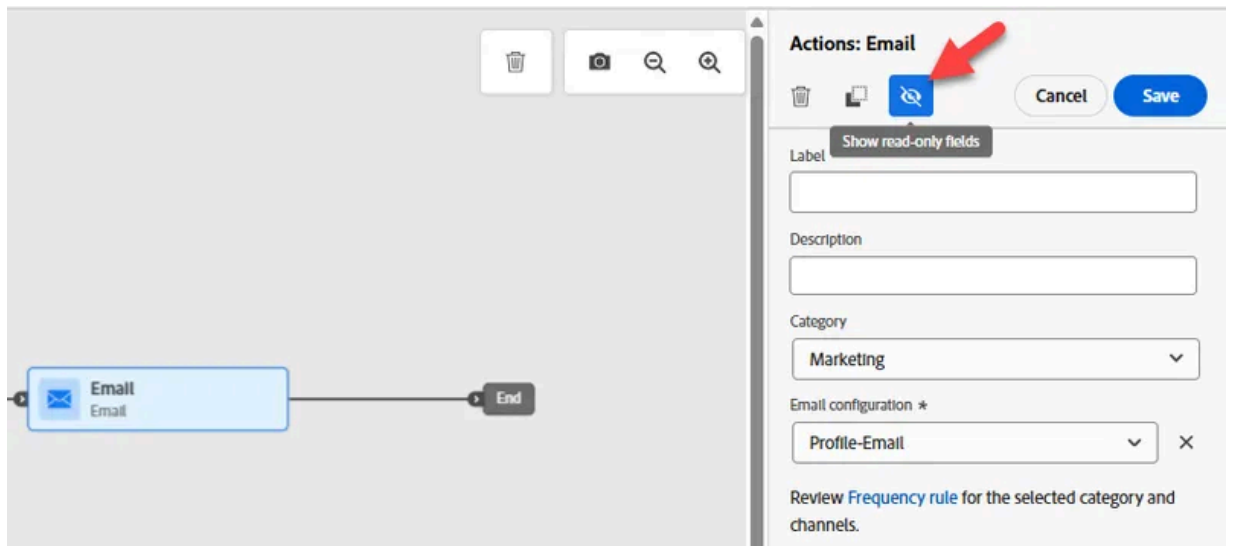


13. And then click the **Back** button again...

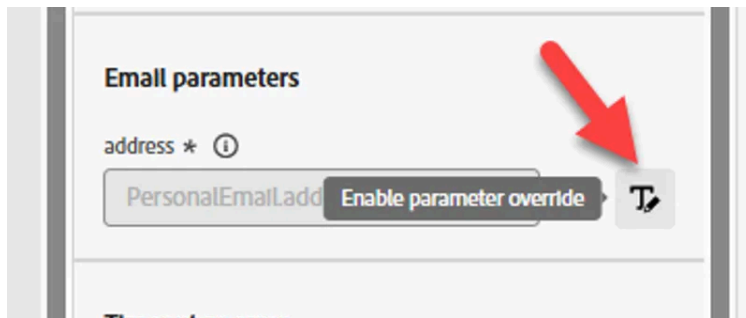
Kidding! That's was the last back button.....in this section 😊

Override Email Parameters

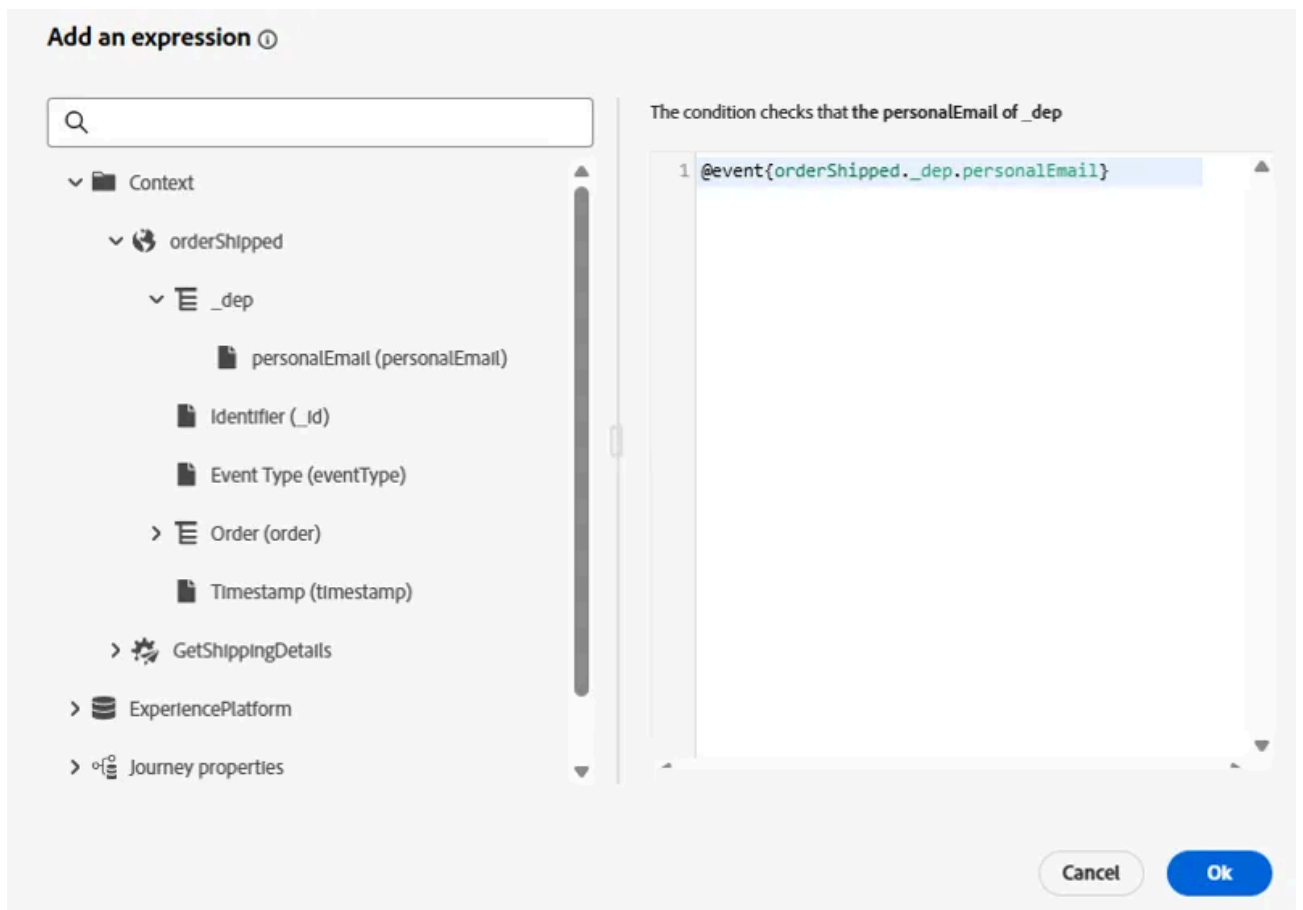
1. Back on the main Journey Canvas, on the Email node, make sure you can see the read-only fields (you may need to click on the **Show read-only fields** icon)



1. Scroll down to **Email Parameters** and click on the **Enable parameter override** icon



2. Click in the empty text box and then in the left rail drill down into **Context** → **orderShipped** → **_dep** and click on the **personalEmail** field. Then click the **OK** button



This is a dangerous thing to do so avoid using it unless you need to in a production setting. This will override the default location that Journeys looks for on the profile to execute messages.

4. Click the **Save button** in the top right and then click the **back arrow** ← in the top left to **close** the Journey



Recap

A published journey capable of responding to the Order Shipped event trigger, get the ETA from an external service and send an email.

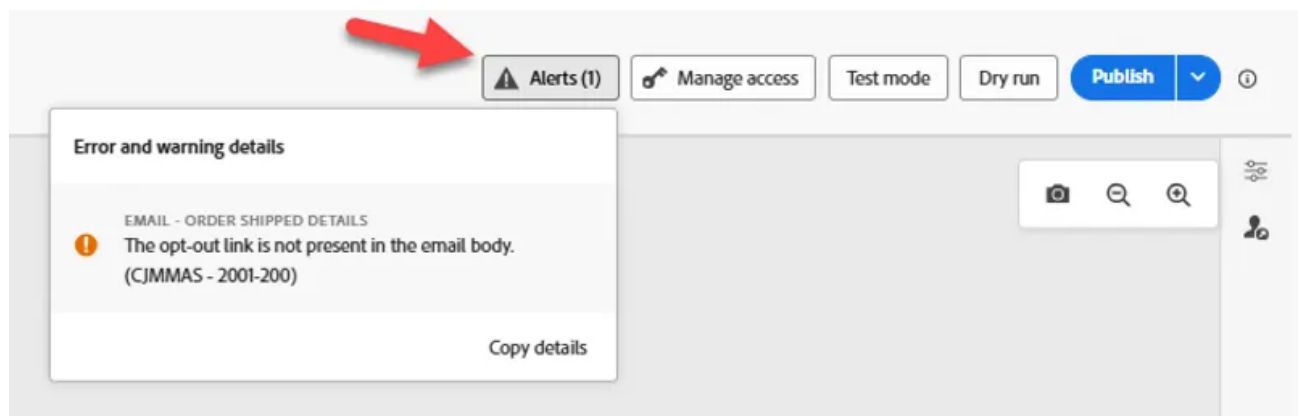
5.1.4. Test Journey

Learning Objective

Use the journey testing tools to verify that the event trigger and journey logic are configured correctly.

Test the Journey

1. Click on **Journeys** on the left rail and the **Browse tab** if you don't see a list of Journeys
2. Click on your **Journey** to open it
3. Click on **Alerts** & ensure no errors (warnings are ok)



What is CJMMAS - 2001-200

Indicates the opt-out link is missing in an email variant

4. Click on the **Simulate** and on the left side, select **Test Mode**



It might take a minute to get ready. During that time the Trigger an Event button will not be available.

5. Click **Trigger an Event** and fill out these properties:

- **Event Type:** `orders.shipped`
- **Personal Email:** `henry.creel@emailsim.io`
- **Order ID:** `123`

6. Click **Send** (note, it takes a few seconds to respond after clicking send)

The screenshot shows the 'Order Shipped Journey' configuration interface. On the left, a sidebar contains sections for 'Test mode', 'Event', and 'Results'. A red arrow points to the 'Trigger an event' button in the 'Event' section. The main area displays the 'Event configuration' dialog box, which is titled 'Event configuration ⓘ'. The dialog has a search bar at the top right with the text 'orderShipped' and a 'Code view' link. Below the search bar, there is a table with four rows of event properties:

EVENT TYPE	Event Type
event type	orders.shipped
CUSTOMERID	customerID
PERSONALEMAIL	personalEmail
ORDER ID	Order ID

Below the table, the values for the properties are listed:

customerID	string
personalEmail	string
Order ID	123

At the bottom right of the dialog, there are 'Cancel' and 'Send' buttons. A red warning triangle is visible next to the 'personalEmail' property value.

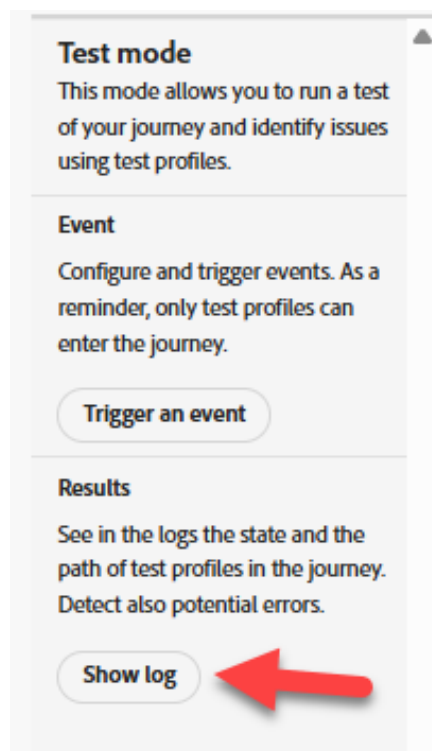
Note: Some students get errors and need to send this a few times. You may have to do this **multiple** times.

Sometimes the first Send gives an error of:

Inlet does not exist (Reference id: 3216a850-c40d-11f0-8fa5-73d1522cc9a2)

If you get an error, Click **Trigger an Event**, then **send** again. You may have to do this **multiple times**.

7. Under **Results** → Click **Show Log** on left side



Some students who received errors sometimes receive different logs that look more like the below. This is not a blocker, go ahead and move on to the next step:

```
{  
  "instances": []  
}
```

You should see something like this in the log:

We are looking for the key fields we used

...

```
"actionsHistory": {
  "8919055f-1b00-4a43-8bd6-c8af894474b2": {
    "eta": "11/27/2025",
    "tracking_number": "091204404",
    "jo_status_code": "http_200"
  }
},
"transitionsHistory": {
  "orderShipped (1158856989)": {
    "eventType": "orders.shipped",
    "_id": "joTestModeEvent_5abbfdcd-561d-45a7-ba42-d0640539831a",
    "_dep": {
      "personalEmail": "henry.creel@emailsim.io"
    },
    "order": {
      "orderId": "123"
    },
    "timestamp": "2025-11-17T23:30:49.576289372Z",
    "_experience": {
      "campaign": {
        "orchestration": {
          "eventID":
"0afa45de34b6217707c9eea915cbe0b0384ab970bcd26122f4ece977fd9040af"
        }
      }
    },
    "{GetShippingDetails (a03d4b8d-e734-4717-a7f8-e3fa2a848723_8919055f-1b00-4a43-8bd6-c8af894474b2)} → {Email (40ef8272-871d-4eb5-b1e3-825a8ea1bbdf)} (df153ea0-e105-3467-9590-a2351c6f83b2)": {},
    "{Email (40ef8272-871d-4eb5-b1e3-825a8ea1bbdf)} → {End (250b03fb-da4d-4e79-a424-25d540bd4f1d)} (2880ab91-cc84-3961-bfe5-2e652085001b)": {}
  }
}
```

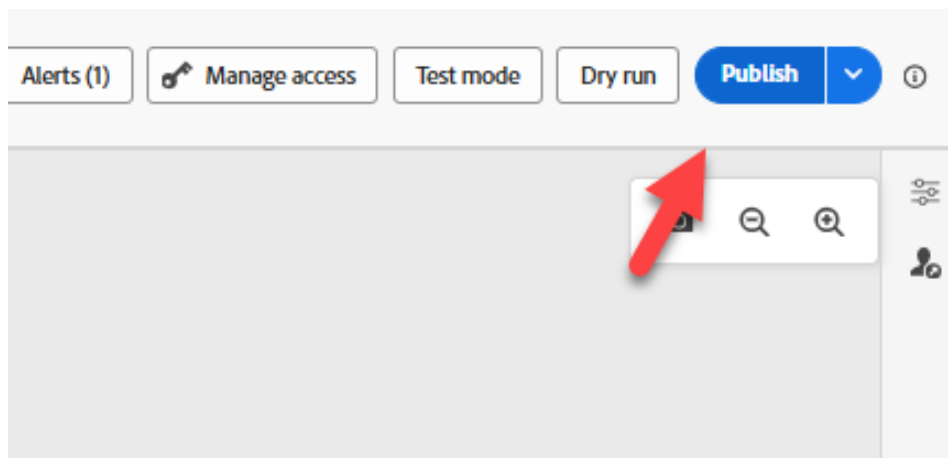
```
}  
]  
}
```

8. **Close** the Browser **tab**

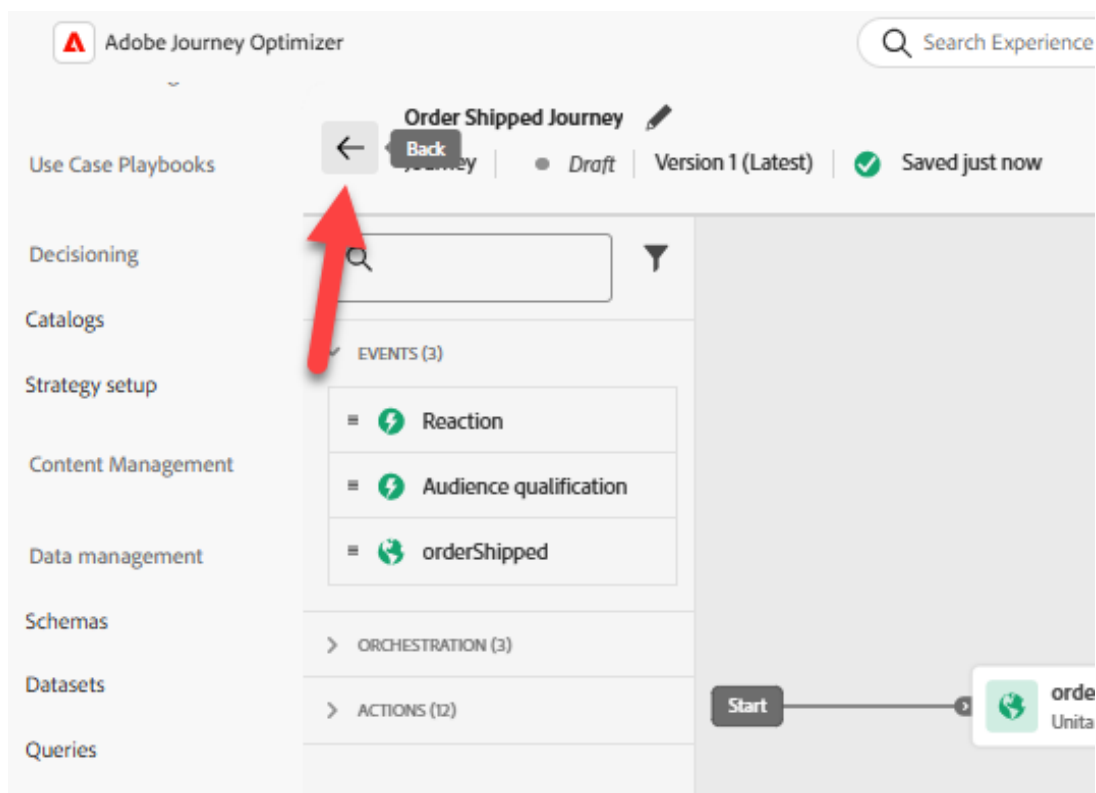
9. **Close Test Mode** in the top right



10. Click on **Publish** the Journey in the top right



11. **Close** the **Journey** by clicking ← arrow in the top left



Next we will send a real Order Shipped Event into AEP

Recap

The journey has passed configuration validation and is ready to receive events

5.1.5. Send an Event

Learning Objective

Send a simulated Order Shipped event to trigger the journey using Postman

Streaming to Hub vs Edge

Earlier, we sent in an Event to the Edge. There are some use cases where we may have a back-end system that wants to stream in an event, but does not need to send it to the Edge. This lab shows how to do that by **streaming in an Order Shipped event to the Hub** (aka server to server, e.g. Commerce Server to AEP signaling an order has shipped).

Validate Event is Not in Profile

1. Go over to your **Profiles** and lookup the Profile.
 - **Identity namespace** → `email`
 - **Identity value** → `henry.creel@emailsim.io`
2. Click on **Events** tab.
 - There should be **no** `orders.shipped` events

Modify API Request

To create the API request, you need to fill in the following pieces in the body of the API request.

Start by gathering the following values:

Find Account Streaming Endpoint

1. Navigate to **Sources** in the left rail and then click on **Accounts** in the top nav
2. Search for **dep: HTTP API [raw]**, highlight the row and copy and save the value of the **Streaming Endpoint** somewhere you can reference later

Sources

Catalog Dataflows **Accounts** Key Pairs System view

NAME SOURCE USERNAME DATAFLOWS CREATED ACCOUNT STATUS

Streaming Ingestion - EK	HTTP API	Streaming Ingesti...	1	10/24/2024, 6:26 PM	Enabled
dep: HTTP API [raw]	HTTP API	dep: HTTP API [r...	10	10/10/2024, 1:46 PM	Enabled

dep: HTTP API [raw]

Destination
HTTP API

Description
dep: HTTP API [raw]

Username
dep: HTTP API [raw]

Created
10/10/2024, 1:46 PM

Account status
Enabled

Streaming endpoint
<https://dcs.adobedc.net/collection/4b995ae5406949d663885b1e0ee3068b87fb0639b805488d2313fda435a2e6af>

dep: HTTP API [raw]

Find Dataflow ID

1. Click on **dep: HTTP API [raw]**
2. Find the record for **dep: Orders (stream)** click on the dataflows link
3. In the right rail copy and save the **Dataflow ID** values somewhere you can reference later

Click in an empty space on the row. DO NOT click on the blue links!

Sources										
Catalog Dataflows Accounts Key Pairs System view										
DATAFLOW...	TARGET...	DATA TYPE	LAST DAT...	LAST DAT...	SOURCE...	ACCOUNT...	SOURCE	CREATED	MODIFIED	STATUS
Customer ...	*** Customer ...	Customer	No runs	-	-	-	Local fi	10/24/202...	10/24/202...	Enabled
Customer ...	*** Customer ...	Customer	Success	10/24/202...	-	-	Local fi	10/24/202...	10/24/202...	Enabled
dep: Cust...	*** Customer ...	Customer	No runs	-	-	-	Local fi	10/24/202...	10/24/202...	Enabled
Customer ...	*** Customer ...	Customer	No runs	-	-	-	Local fi	10/23/202...	10/23/202...	Enabled
Edge Networ	*** dep: Cust...	Customer	Complete	10/21/202...	-	-	Adobe I	10/21/202...	10/23/202...	Enabled
Edge Networ	*** dep: Web	Custom	Complete	10/21/202...	-	-	Adobe I	10/21/202...	10/23/202...	Enabled
dep: Prod...	*** dep: Prod...	Custom	No runs	-	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/10/202...	Enabled
dep: Plan ...	*** dep: Plan ...	Custom	Complete	10/10/202...	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/12/202...	Enabled
dep: Store...	*** dep: Store...	Custom	No runs	-	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/10/202...	Enabled
dep: Web ...	*** dep: Web	Custom	Complete	10/10/202...	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/12/202...	Enabled
dep: Eco...	*** dep: Eco...	Custom	No runs	-	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/10/202...	Enabled
dep: Orde...	*** dep: Orders	Custom	Complete	10/10/202...	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/12/202...	Enabled
dep: Billin...	*** dep: Billing	Custom	Complete	10/10/202...	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/12/202...	Enabled
dep: Cust...	*** dep: Cust...	Customer	Complete	10/10/202...	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/12/202...	Enabled
dep: Cust...	*** dep: Cust...	Customer	No runs	-	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/10/202...	Enabled
dep: Cust...	*** dep: Cust...	Customer	Complete	10/10/202...	dep: HTTP A	dep: HTT...	HTTP A	10/10/202...	10/12/202...	Enabled

Properties

dep: Orders (stream)

Source data

dep: HTTP API [raw]_5d29c49f-fbe9-4658-a95e-3bccf34024ea

Target dataset

dep: Orders

Source

HTTP API

Status

Enabled

Partial ingestion

Not enabled

Error diagnostics

Not enabled

Created

10/10/2024, 1:47 PM

API Usage

Dataflow ID

ed4547cc-9c1a-47e3-a0c8-86d15e37e853

Dataset ID

67083d346304bf2aef52e818

Mapping set ID

cb2be958d69d4328905877ca21e8800f

Mapping version

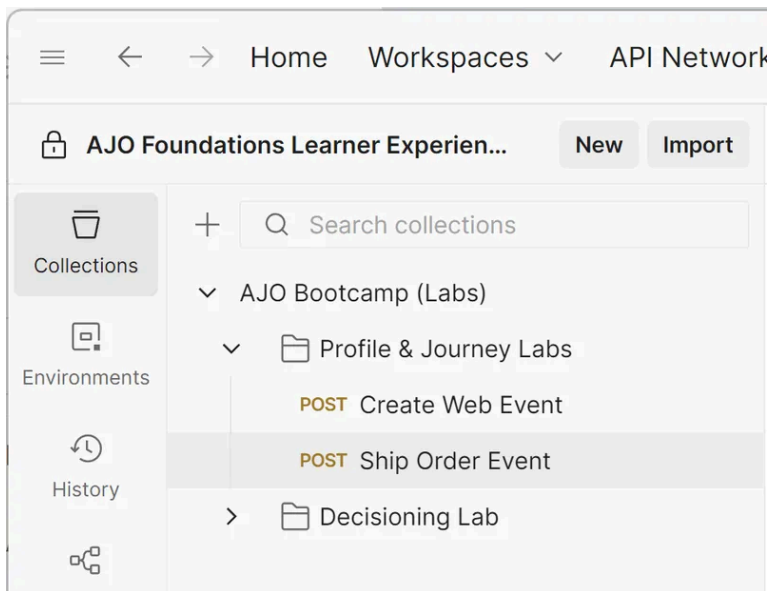
0

Web Dataflow and Dataset IDs

Open Postman

Launch Postman on your computer and navigate to the following API call:

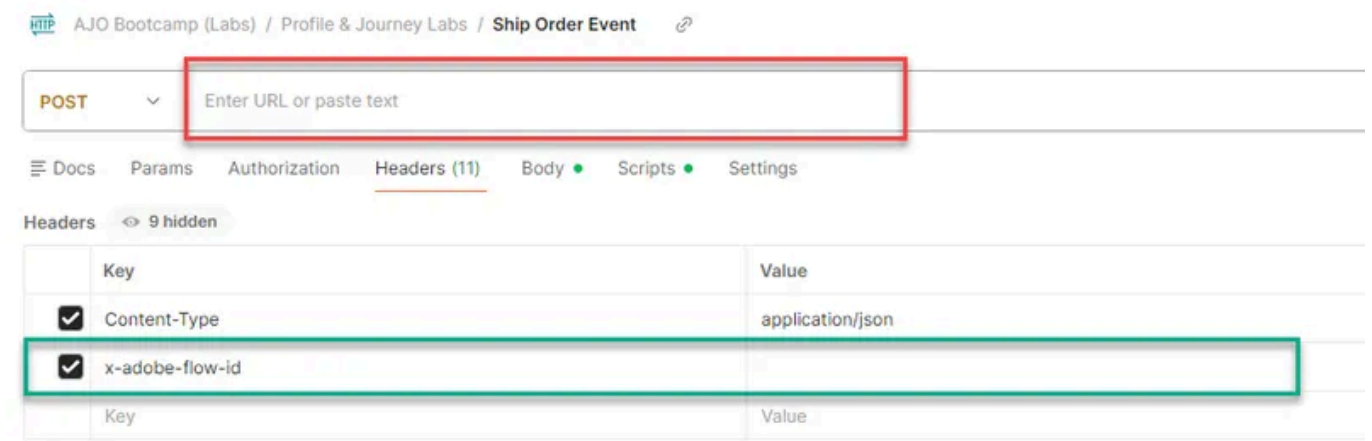
- **Postman Left Sidebar** → Collections
- **Collection** → AJ0 Bootcamp (Labs)
- **Folder** → Profile & Journey Labs
- **API Request** → Ship Order Event



Create Final API Request

1. Copy the values you saved in the previous steps into the places highlight below.
2. Click on **Headers** and paste in these values (remove any trailing spaces):
 - **Red** → Streaming Endpoint URL
 - **Green** → Dataflow ID
 - Value looks like a GUID (does not start with http)

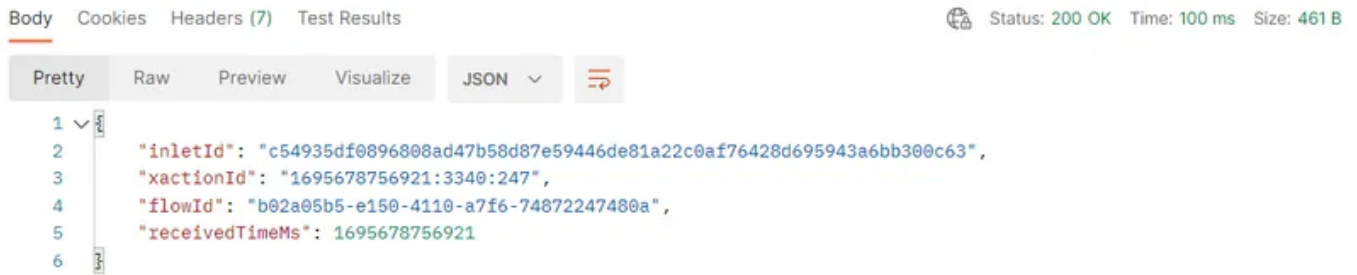
DO NOT EXECUTE YET!



Execute the API

1. Save your API call by clicking the **Save** button
2. Execute your request by clicking the **Send** button

A successful call should result in the following response...



Recap

A Ship Order event is successfully sent to the platform

5.1.6. Validate Event Ingested

Learning Objective

Confirm that the event was successfully ingested into Adobe Experience Platform.

Validate Event in Profile

1. Go over to your **Profiles** and lookup your Profile to see that the event was ingested onto Profile. It should appear in seconds.
 - **Identity namespace** → `email`
 - **Identity value** → `henry.creel@emailsim.io`
2. Click on **Events** tab. Look for `orders.shipped` event.

Profiles > Profile BVrqzwVuzXWpopZXq_mnaG3v3KJg

Detail Attributes Accounts Opportunities Source records **Events** Audience membership

eventType	Event Type
timestamp	Timestamp
_id	Identifier
id	id
primary	primary

 **orders.shipped**
11/17/2025, 4:12 PM [View all](#)

ATTRIBUTE	DISPLAY NAME
eventType	Event Type
timestamp	Timestamp
personalEmail	personalEn
_id	Identifier
orderID	Order ID

Did you get any **message.feedback** events. These are from Journeys and usually indicate a failure or exclusion. Click on them and look at the `reason`.

Some examples you might run into in production might be:

- EmailNoAddressFoundInProfile (you tried to send an email to a profile that didn't have an email)
- EmailNoConsent (you tried to send an email to a profile that had consent set to no).

3. Validate the Profile has qualified for the **Audiences** (it may take a few minutes).

- Any Event Edge (within 15 minutes)
- Any Event Streaming (within 15 minutes)

Profiles > Profile BVRqzwVuzXWpopZXq_mnaG3v3KJg

Detail Attributes Accounts Opportunities Source records Events Audience membership

Q

AUDIENCE NAME	DESCRIPTION	MERGE POLICY
dep: Any Event Edge (within the hour)	dep: Any Event Edge (within the hour)	Default Timebase
dep: Any Event Streaming (within the hour)	dep: Any Event Streaming (within the hour)	Default Timebase



Try with Your Own Email

Now that you have validated the Profile got in, let's send in some Order Shipped Events using your own email.

1. Go back to Postman, find the **Ship Order Event**
2. click on the **Body** & change the **email address** to yours.

POST
Enter URL or paste text

Params
Authorization
Headers (12)
Body
Scripts
Settings

☐ none
☐ form-data
☐ x-www-form-urlencoded
☒ raw
☐ binary
☐ GraphQL
JSON

```

1  {
2      "eventType": "orders.shipped",
3      "timestamp": "{{ $isoTimestamp }}",
4      "_id": "{{ $randomUUID }}",
5      "_dxp": {
6          "personalEmail": "change this to your email address",
7      },
8      "order": {
9          "orderId": "{{ orderId }}"
10     },
11     "shipping": {
12         "shipDate": "{{ $isoTimestamp }}"
13     }
14 }

```

3. **Save** and hit **Send**.

4. Go back to steps 1-3 and validate using your email address.

Recap

The event appears in the Profile store and the Profile is now part of Audiences that were looking for the event.

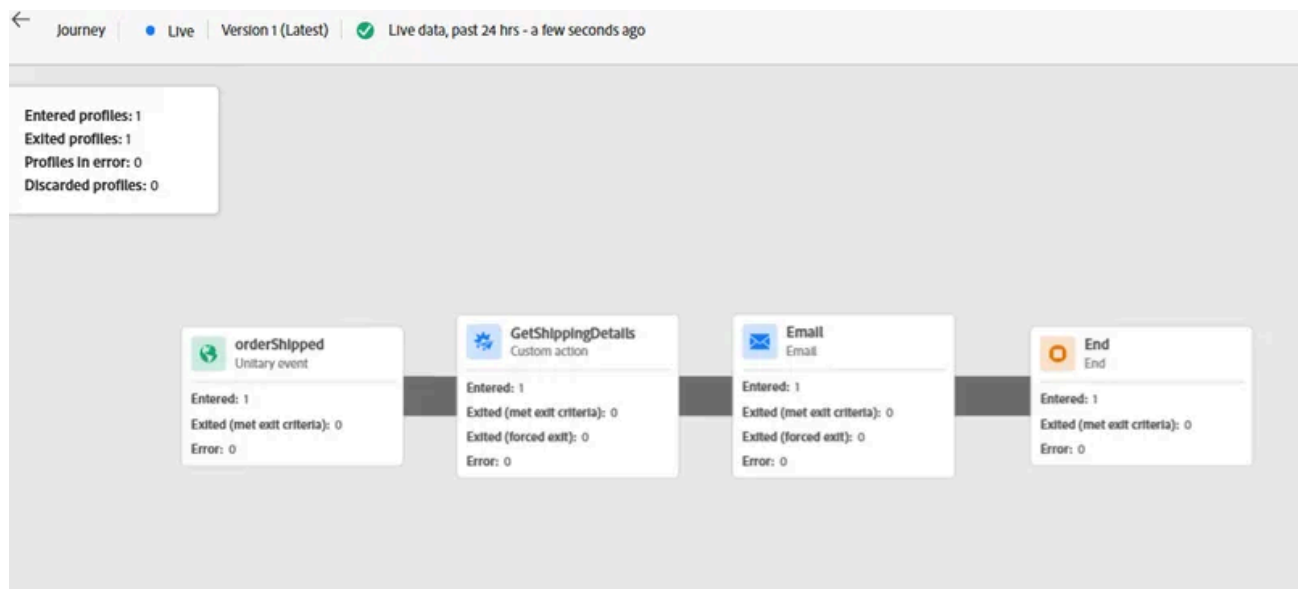
5.1.7. Validate Journey

Learning Objective

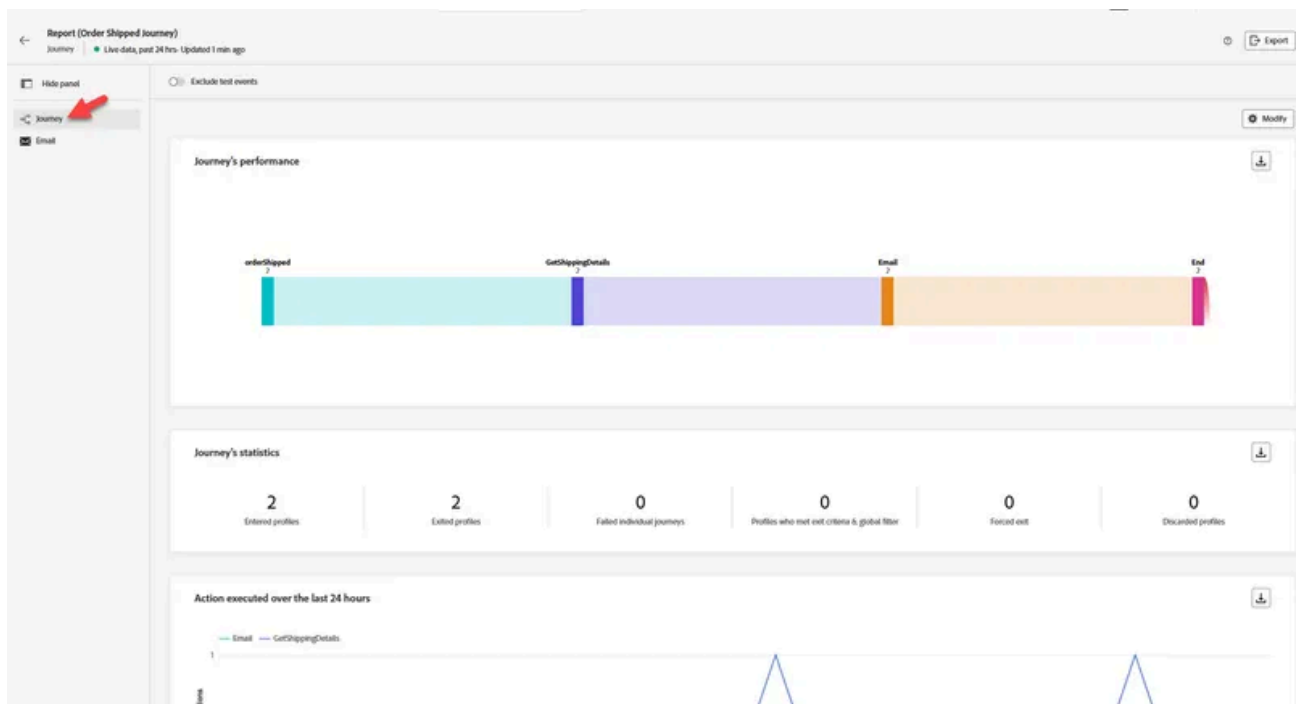
Verify that the journey was triggered and executed as expected. Verify reports show metrics updated as expected.

Checking Your Journey

1. Go to your Order Shipped Journey, open it if you closed it
2. You should see at least 2 Profile Entered



3. Click **View Report** → **Last 24 hours** in the top right.
4. By default, you should be in the **Journey** tab (on the left rail)
 - You should see some enters and exits (count will depend on how many events you sent in, any testing, any errors, etc.)



- If everything went through clean you should have (scroll down to check):

- **Journey's statistics**

- 3 Entered Profiles (Henry, You and the Testing we did)
 - You can click the toggle at the top to **exclude test events** if you want and you will see these numbers change
- 3 Exited Profiles (Henry, You and the Testing we did)

- **Actions executed and errors**

- 6 Actions (3 Email, 3 GetShippingDetails)

- **Actions error reasons**

- 0 Errors (hopefully)

- **Events**

- 3 Events (orderShipped)
- 3 External Events

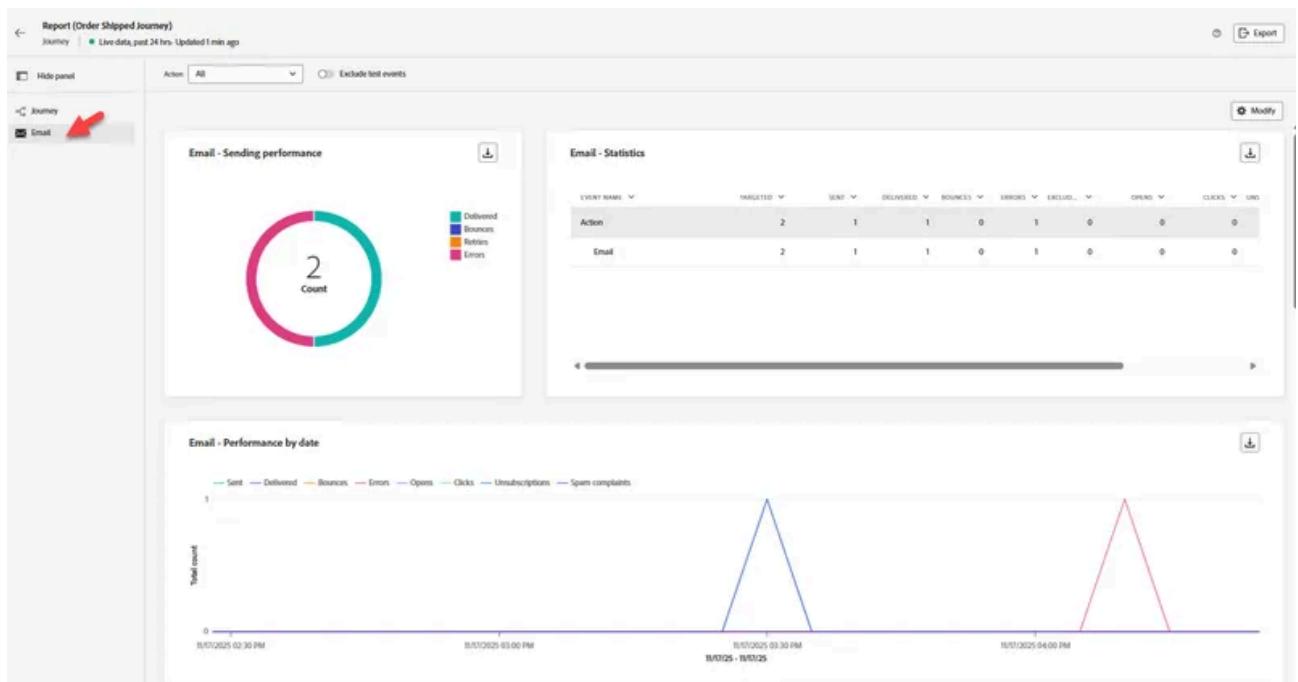
5. Click on the **Email** tab (on the left rail)

- **Email - Sending Performance**

- You should see some values for **Delivered** and **Sent** (count will depend on how many events you sent in, any errors, etc.)
- Hopefully, you have no errors (unless you ran into some problems earlier)

- **Email - Statistics**

- Email - 3 targeted, sent, delivered



6. Go check your **email inbox** and see if you got the email (it should look similar to this below)

- ,your order has shipped ETA: 10/17/2026 Tracking Number: 051009364

Check your Spam folder for AJO Campaigns ajo-campaigns@email.dep-labs.com

Why is first name missing?

We changed the Email node to look at the Event Context for the email address. But the first name in the personalization is pulling from `{{profile.person.name.firstName}}`.

When you look up your profile for your email, do you have a firstName?

7. After 30-60 minutes, you can even check your dataset in the data lake with the following: **Queries** → **Create Query** → **Copy/Paste SQL** → **Run**

Note: The order shipped event was streamed in, so while it updated profile quickly, it will take a while before the data lake is updated.

```
SELECT * FROM dep_orders
WHERE timestamp >= CURRENT_DATE
LIMIT 10
```

TIMESTAMP	PRODUCTLISTITEMS	SHIPPING	STORE	_SCP	ORDER	BILLING	_ID	EVENTTYPE
10/16/2025, 12:15 AM		(NULL,NULL,NULL,2025-11-18 00:05:53.71)	(NULL,	@adobe.com)	(NULL,NULL,NULL,606f54e-83de-4fbc-a58f-a25de9083af)		db60309-306-4083- 88b7-285b5f9905	orders.shipped
10/16/2025, 12:12 AM		(NULL,NULL,NULL,2025-11-18 00:12:12.384)	(NULL,	@adobe.com)	(NULL,NULL,NULL,5fa405c-9c26-4ed7-bf56-c5a68f536f9)		d67c2748-4844-4aef- a6da-4ee88b6c42b	orders.shipped

Bonus (check Step Events)

Step Events records whenever a profile starts a journey and every step in the journey. Note: it may take a few minutes to record these events into the dataset.

1. While in Query Service, you can view what the step events dataset is capturing by running this SQL. Copy the below SQL and paste into a query.

```
select timestamp,
identityMap,
_experience.journeyOrchestration.stepevents.journeyVersionName,
_experience.journeyOrchestration.stepevents.NodeName,
_experience.journeyOrchestration.stepevents.*
from journey_step_events
limit 50
```

Results will have over 100 columns and gives you an idea of what Step Events records.

Curious about what each field means, check out the AJO Schema Dictionary and change the drop down to the Journey Step Events schema:

<https://experienceleague.adobe.com/tools/ajo-schemas/schema-dictionary.html?lang=en>

Recap

The journey instance appears in journey reporting or logs and the configured action is executed

5.1.8. Summary

In this lab, you built and validated an Order Shipped event-driven journey using Adobe Journey Optimizer within Adobe Experience Platform.

You began by configuring an event that serves as the trigger for a customer journey and creating a custom action that defines how the journey interacts with an external endpoint. Using these components, you built a unitary journey designed to respond to a Order Shipped event.

After configuring the journey, you tested the setup and sent a simulated event using Postman to trigger the experience. You then validated that the event was successfully ingested into the platform and confirmed that the journey executed as expected.

IF YOU ARE READING THIS IT MEANS YOU ARE AT THE END OF THE LAB.

DO NOT PROCEED, DO NOT PASS GO, DO NOT COLLECT \$200

6. Decisioning

6.1. Abandoned Browse

Pre-Requisites

The below labs must have been completed before starting this lab

- **Data Stores -- Profile in Action → [Create Datastream](#)**

If you have not completed these labs please do so now before continuing.

Business Objectives

The business use case for this lab is that Connection 5G wants to increase sales of the new Apple flagship phone, the iPhone 17, by targeting customers who have browsed the iPhone 17 overview page but haven't purchased. The key objectives of the campaign are as follows:

- **Identify high-intent customers** by detecting when a user views a flagship phone page multiple times without completing a purchase.
- **Trigger a real-time personalized experience** across all Connection 5G-owned digital surfaces when this behavior occurs.
- **Deliver contextual offers** based on key customer attributes such as the **account holder's age** and their **current mobile plan**.

- **Ensure offer eligibility is enforced** so that customers only see phone offers that are compatible with their plan.
- **Dynamically adjust the phone tier offered** (e.g., base, pro, ultra) based on the customer's engagement or response to previous offers.
- **Provide consistent personalization across channels** by using centralized decisioning logic to determine the best offer in real time.
- **Increase conversion likelihood** by presenting the most relevant flagship phone offer to each customer at the right moment.

Lab Learning Objectives

To meet the above business objectives in this lab, you will learn how to:

- **Extend the offer data model** by adding custom attributes to the offer schema so they can be used in decisioning logic.
- **Create eligibility rules** that determine which profiles qualify for specific offers based on profile attributes.
- **Build and configure offer items**, including setting priorities, defining eligibility conditions, and applying frequency capping.
- **Organize offers into a collection** so they can be easily referenced and evaluated during the Decisioning activity.
- **Create a ranking formula** that dynamically adjusts offer priority based on profile characteristics.
- **Configure a selection strategy** that combines offer collections, eligibility rules, and ranking logic to determine which offers are considered and how they are ordered.
- **Set up a Code-Based Experience (CBE) channel** to allow external systems to request decision results and receive offers in JSON format.
- **Test the end-to-end decisioning workflow** by sending experience events and decision requests to validate eligibility logic, ranking behavior, and frequency capping.

By completing this lab, you will gain hands-on experience designing and validating a **complete offer decisioning workflow in Adobe Journey Optimizer** to meet the business use case.

6.1.1. Create Decision Rule

Objective

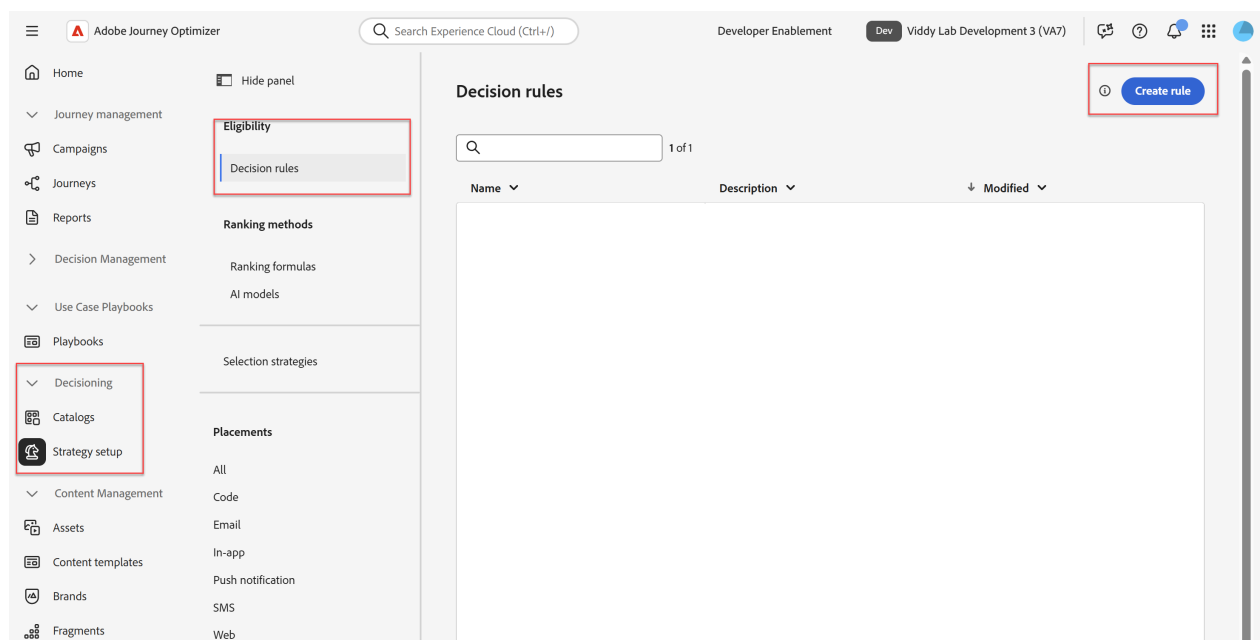
Since eligibility is one of the key building blocks of an offer, the first step is to create the necessary entities to support it. In many cases, audience membership is the deciding factor, but in this case, we'll use Decision Rules. With Connection 5G, higher-end iPhone 17s can only be activated for users with a high-tier plan. As such, we'll use a decision rule to ensure that offers for higher-end phones are available only to those with a high enough plan.

Create the Decision Rule

1. If necessary, log in to the Adobe Experience Cloud and navigate to **Adobe Journey Optimizer**.
2. Expand the **Decisioning** menu item in the left rail if necessary, and click on **Strategy Setup**.

Be sure you are in the Decisioning menu and NOT the Decision Management menu. If the Decision Management menu is expanded, collapse it to avoid navigation confusion during this lab.

2. Click on **Decisioning Rules** under the 'Eligibility' menu, followed by the **Create rule** button in the upper right corner.



Navigating to Decision Rules

3. You will be taken to a screen that resembles the Segment Builder UI. Add the Plan ID attribute to the rule canvas by clicking on **XDM Individual Profile > DEP > Plan Details** and then dragging the **Plan ID** attribute to the canvas.
4. Change the drop-down from equals to **contains**.
5. Enter the text **2** in the box, press **Tab** key to accept the 2 value, then enter a **3**, press **Tab** again so that the rule is looking for any Plan IDs that contain a 2 or 3
6. Use the **Name** textbox in the right rail to name the Decision Rule **Upper Tier Plans**. Add a description if you'd like. When finished, your Decision Rule should look like this:

The screenshot shows the 'Create rule' interface with three main sections:

- Fields:** A sidebar on the left with tabs for 'Attributes', 'Context Data', and 'Audiences'. Under 'Attributes', there's a search bar and a list of fields: 'Plan ID properties', 'Plan ID', 'Plan Name', and 'Plan Type'. Each field has a path (e.g., '...Idual Profile > Dep > Plan Details > Plan ID') and an information icon.
- Rule Configuration:** The central area shows a rule with the condition 'Plan ID contains' followed by a dropdown menu. Below this, there are two checkboxes: '2 x' and '3 x', and a 'Case sensitive' toggle.
- Audience properties:** The right sidebar shows the rule's status. It indicates 'Has not evaluated' and 'QUALIFIED PROFILES'. Below this, it shows '~ 0' and 'ESTIMATED PROFILES'. There are also buttons for 'Refresh estimate', 'View profiles', and 'Code view'. At the bottom, the 'Name' field is set to 'Upper Tier Plans' and the 'Description' field contains the text: 'This is a rule that only identifies users with a high-level plan.'

Decision rule finished state

- Once the rule is correct, click the blue **Create** button in the upper-right corner, and you'll be returned to the Strategy Setup page with the Decision Rule you just created listed as the only Decision rule.

Why use a Decision Rule instead of an Audience? In practice, the primary reasons would be that you needed eligibility criteria specific to the decisioning package or you needed attributes of the offers in the criteria. Offer attributes aren't available fields in the Audience builder.

The Upper Tier Plans Decisioning Rule used in this lab would likely be an actual Audience in a real-life implementation, given its likely re-usability outside of Decisioning. However, a Decisioning Rule was used here for educational purposes and to showcase its functionality and the multiple ways eligibility can be applied.

Recap

You've now created a reusable Decision Rule, which you will use for offer eligibility.

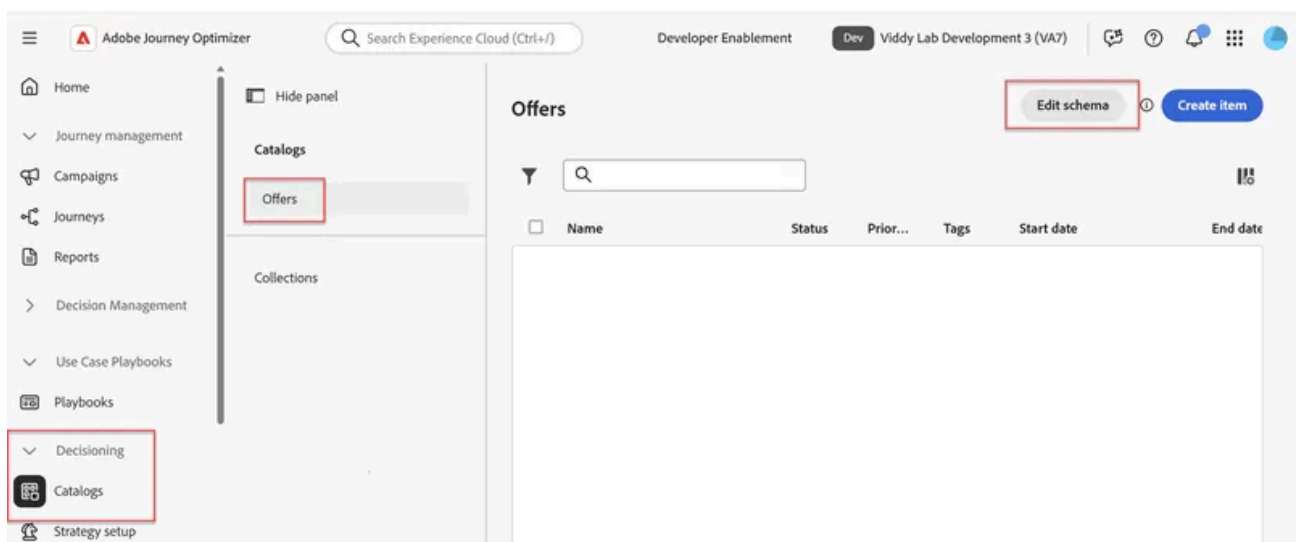
6.1.2. Create Offer Attributes

Objective

In this section, you'll add custom XDM fields to the standard Offer XDM schema. These custom fields can be used in ranking, sorting, and eligibility criteria. They can also be data that is returned to the requesting device.

Create Custom Device Parent Object

1. Expand the **Decisioning** menu item in the left rail if necessary and click **Catalogs**.
2. By default, the 'Offers' page is shown. Click the **Edit schema** button in the upper-right corner.



Navigate to edit offers schema

The resulting page is the standard XDM Schema editor. Just as XDM is used to define the data structure of datasets, XDM is used here to define the attributes of an offer.

The 'Personalized Offer Items - Experience Decisioning' schema is a system-generated standard schema that applies to all offers. However, one can add to this schema to meet unique business needs, which is what you'll do in this section.

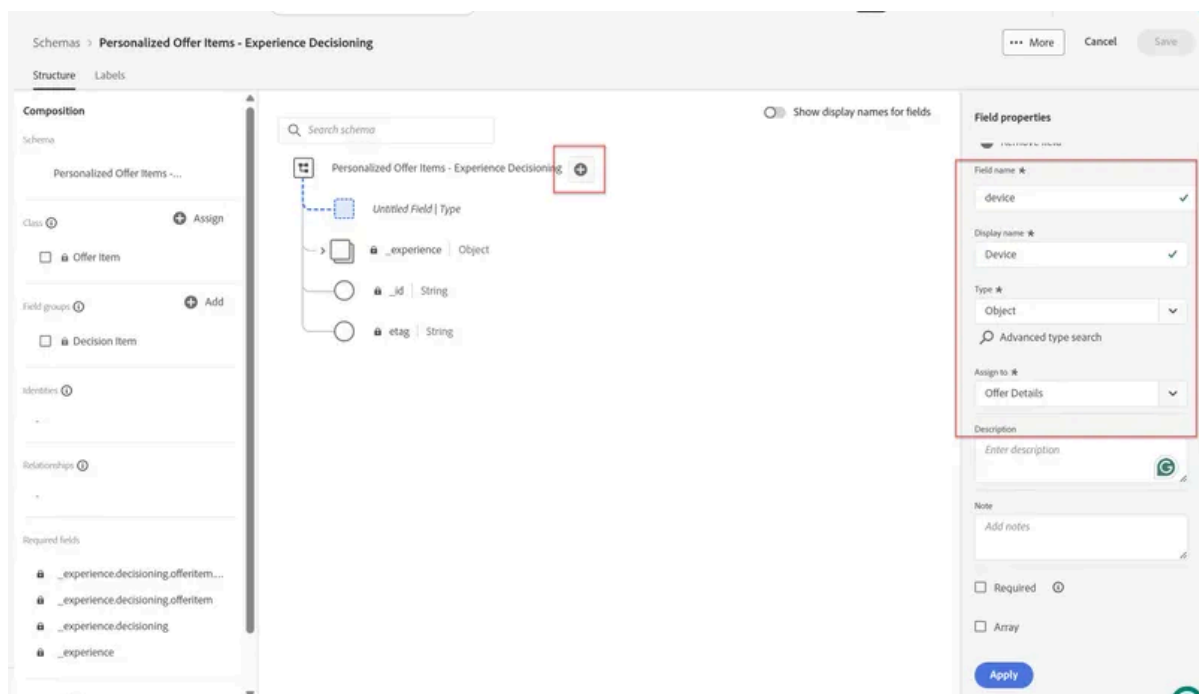
Additionally, going through the offers page is a shortcut for getting to this schema. You could also navigate to it via the Schema menu in the left rail.

3. Click the **+** icon to the right of the root level of the schema, and using the now visible 'Field Properties' menu in the right rail, fill in the following fields with the provided values:

- Field name: **device**
- Display name: **Device**
- Type dropdown: **Object**
- Assign to Field Group (type this value in): **Offer Details**

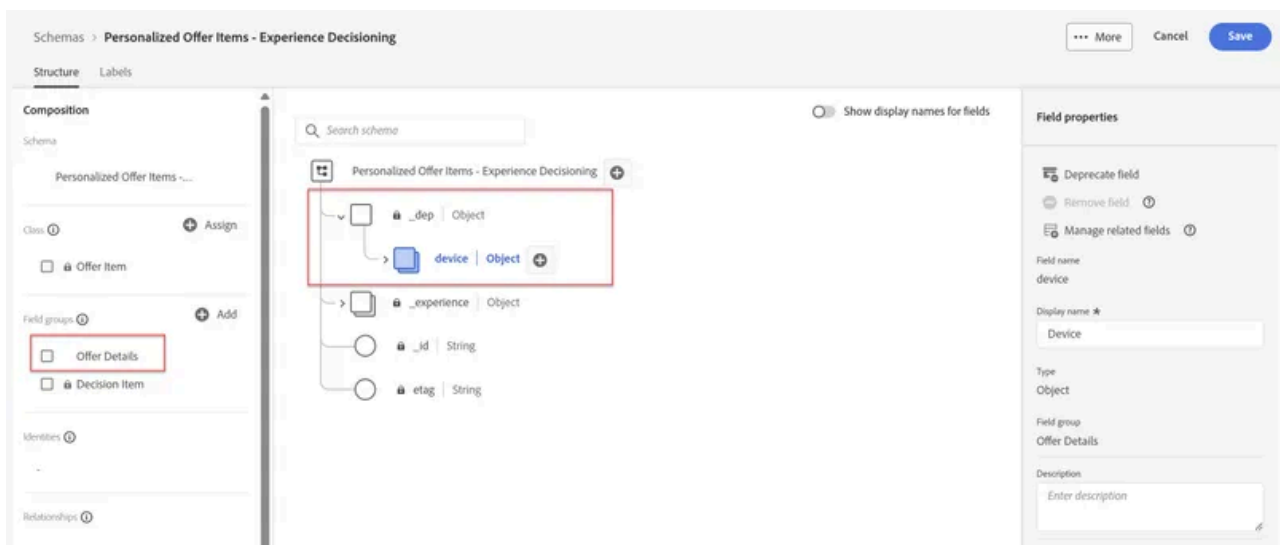
The Assign to Field Group appears to be a dropdown, but it also accepts direct text input; therefore, enter the text 'Offer Details'. When you type it in, you'll see an 'Offer Details (New)' item appear as well. Any new attribute has to be assigned to a field group, so in this step, you're effectively creating a new field group called Offer Details.

4. Ensure that all of the properties have been filled out like the screenshot below:



Create Device Schema

- Once you've verified that all the fields are correct, click the blue **Apply** button at the bottom of the 'Field properties' menu (right rail) to see your changes applied to the schema:



Device schema created

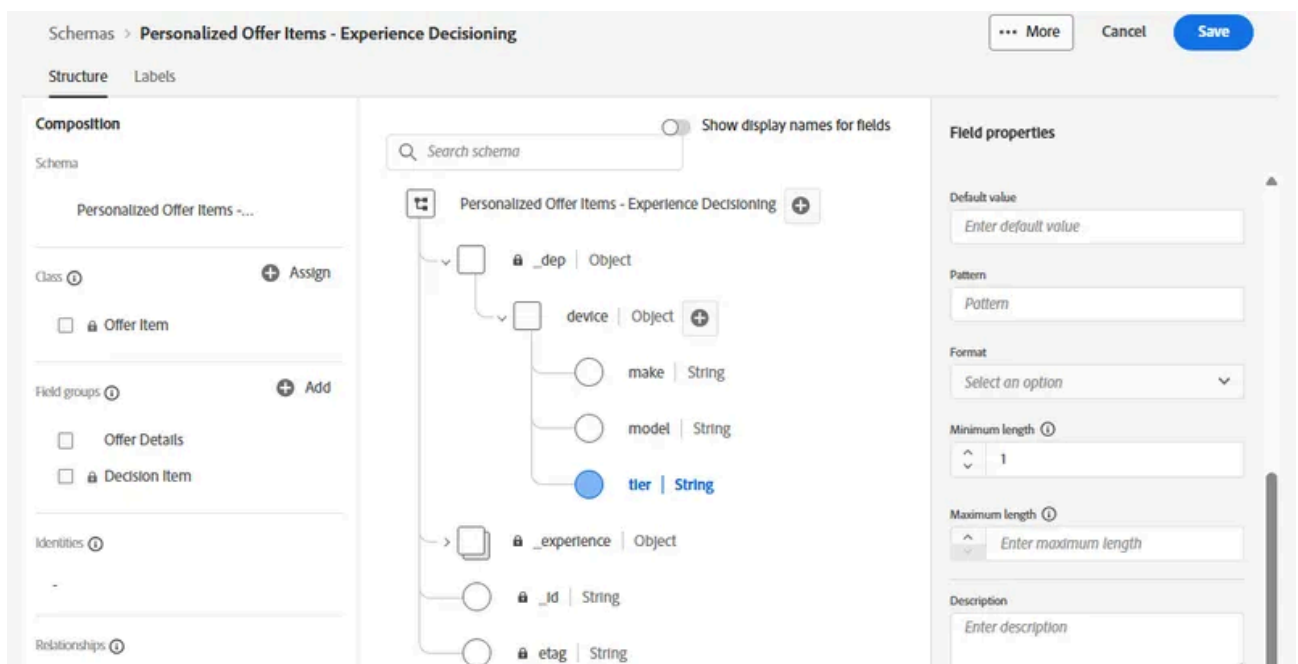
Just like normal XDM, the custom attributes are grouped under a namespace specific to the IMS organization, namely the imsorg tenant ID or 'dep' in this case. You'll also see that the new 'Offer Details' field group is now listed in the 'Composition' pane, left of the schema.

Note that these changes are NOT saved....they are just 'Applied.' If you were to navigate away from the page without saving, you would lose your work. Finish out the steps in this section before navigating away.

Create Custom Device Attributes

Now that the Device XDM object has been created, you can move on to creating device-specific fields.

1. Click the **+** icon to the right of the new **device** object that you just created, and using the 'Field Properties' menu in the right rail, fill in the following fields with the provided values:
 - Field name: **make**
 - Display name: **Make**
 - Type dropdown: **String**
 - Assign to Field Group: **Offer Details** (should already be selected)
 - Once you've verified that all the fields are correct, click the blue **Apply** button to see your changes applied to the schema
2. Repeat the previous steps to add two additional attributes for **Model** and **Tier**. Use the same naming pattern, type, and field group. When finished, the schema should look like this:



Full offers schema validation

3. With all of the new XDM fields/attributes created, click **Save** in the upper right corner and you will receive a green "Schema Successfully Saved" message at the bottom of the screen. You've now completed the steps in this section.

The schema that you just updated applies to ALL offers, including all future offers. Great care should be taken when adding attributes to this schema. In our example use case of a telecom company that sells cell phones, the device make, model, and tier attributes will likely be widely used for many offers and for years to come, so it makes sense to add them. When thinking about which attributes are necessary for an offer, avoid adding attributes that are unique to a specific campaign. Over months or years, this schema can get bloated and cause issues when creating offers. You'll see how this applies in the section where you will create offers.

Recap

You've successfully updated the standard offers schema with reusable custom fields that will be leveraged in later parts of the lab when creating and evaluating offers.

6.1.3. Create Offer Items

Objectives

In this section, you will create the actual offer items that the Code-Based Experience (CBE) will return to the requesting client. Some of the offer items will have eligibility requirements and frequency capping, while others will not.

Scenario Overview

Before creating the offer items, however, here are a few quick reminders about our scenario. First, there are 3 iPhone 17 tiers in our scenario: Ultra, Pro, and Base. We'll create 4 total offers, 1 for each tier, plus a generic fallback offer that the receiving system can use to display general information about the iPhone 17 across all the tiers.

Second, only customers with a plan ID of 2 or 3 are eligible for the Ultra and Pro tier phones.

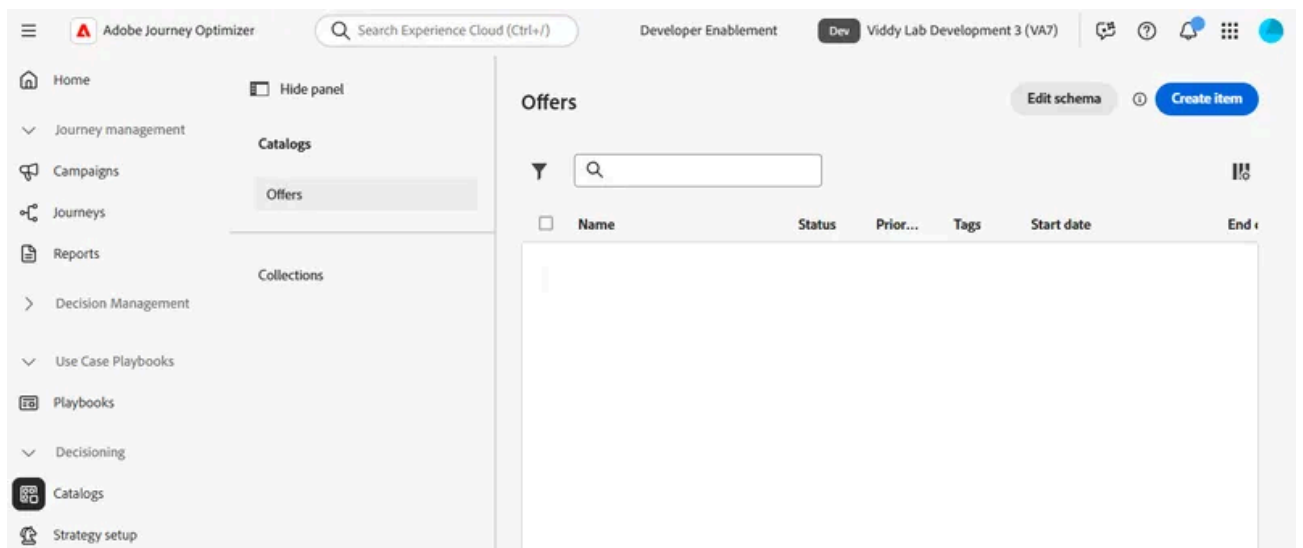
Next, the business has requested that each offer be shown only three times a day before the next lower-tier phone is presented.

Lastly, all things being equal, Connection 5G would prefer to sell the Ultra tier, followed by the Pro, and then the base model. As such, you'll see these priorities appear as we give a priority score to each offer item

Create Default/Fallback Offer Item

The first and easiest offer item you'll create is the fallback offer, which anyone can view for an unlimited period.

1. If necessary, expand **Decisioning** in the left rail and click on **Catalogs**
2. An empty offers page should be shown:



Navigate to catalogs

3. Click the blue **Create Item** button, and you will be taken to the 'Create Offer Item' page.
4. In the 'Offer name' field, enter the text **iphone:17:generic**. Enter a description if you wish.

The all-lowercase, colon-separated naming convention is just one of our own designs that could serve as one to follow for a real customer. In practice, you can develop a different naming strategy for your offer items. Be sure that it is documented and consistent before creating offer items. This will ensure that offer items are easy to find and group together in collections. More on this later.

5. Since this is the lowest-priority/default offer item, you'll leave the default Priority at 1.

In Decisioning, the lower the number, the lower the priority. For example, an offer item with a priority of 100 will be shown before an offer item with a priority of 1

6. Expand the **Device** item in the 'Custom Attributes' area, then enter the following information in the text boxes:

- Tier: **Generic**
- Model: **17**
- Make: **iPhone**

These are the actual text values that both describe the offer and what can be used in sorting, ranking, and eligibility criteria. They are also the text values that can be

returned to the requesting device.

Create offer item

1 Attributes > Eligibility > Review [Manage access](#) [Cancel](#) [Next](#)

Offers | ● Draft

Standard attributes

Offer name *

iphone:17:generic

Description

Start date

mm / dd / yyyy, --:-- AM 

End date

mm / dd / yyyy, --:-- AM 

Priority ⓘ

1  

Tags

Custom attributes ⓘ

▼ Device

Tier

Generic

Model

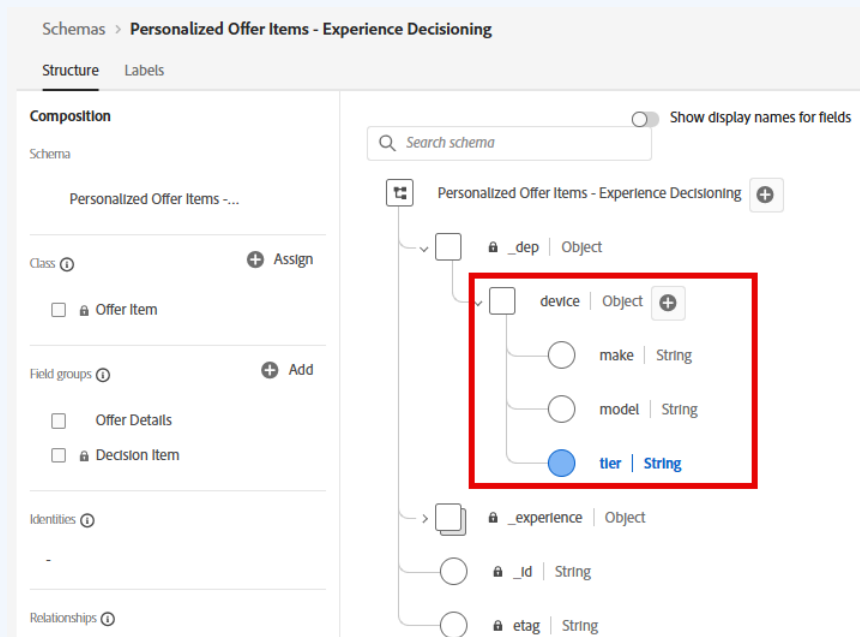
17

Make

iPhone

Completed generic offer custome attribute validation

The Device area you expanded is the same "Device" parent object that was created when the 'Personalized Offer Items - Experience Decisioning' schema was updated with custom attributes in the previous section. The Tier, Model, and Make fields are the individual attributes that were added:



The previous section mentioned the need to take great care when adding custom attributes to the system-generated 'Personalized Offer Items - Experience Decisioning' schema. Each additional custom node will appear as a possible field for every offer item moving forward. Creating unnecessary or campaign-specific attributes will clutter the offer item creation UI and may cause confusion.

7. Click the blue **Next** button in the upper right corner to move on to the next step.
8. This offer should be available to everyone/All Visitors and not have any frequency capping, so there is no need to make changes to the 'Eligibility' or 'Capping' sections. Click the blue **Next** button again to proceed to the last step.
9. On the 'Review' step, verify that all the data is correct:

Create offer item

Offers | ● Draft

1 Attributes > 2 Eligibility > 3 Review

Manage access

Cancel

Back

Save

Standard attributes

Name

iphone:17:generic

Start date

End date

—

—

Priority

1

Id

Custom attributes

Device

Tier

Generic

Model

17

Make

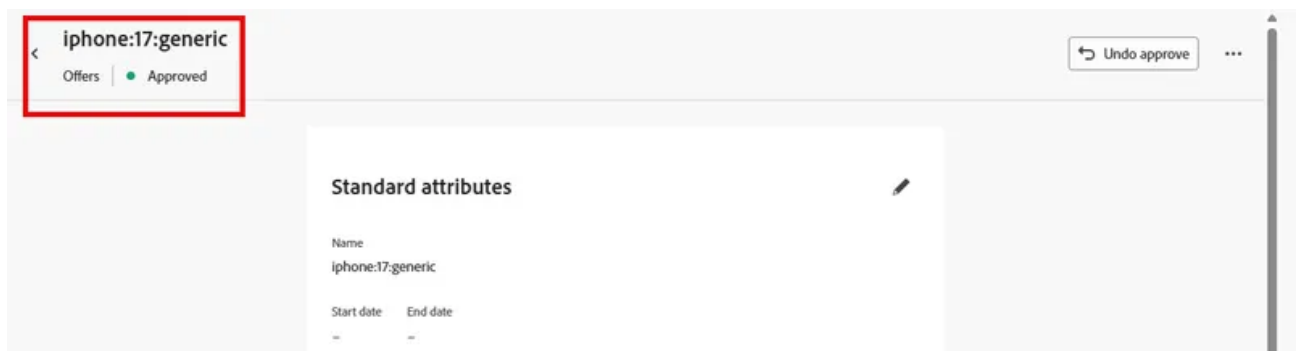
iPhone

Profile constraints

All visitors

Completed generic offer validation

10. Make any necessary changes. When ready, click the blue **Save** button.
11. Once saved, a white 'Approve' button will appear where the 'Save' button used to be. Click the white **Approve** button to approve this offer item. You will see a green 'Approved' indicator below the offer item title:



Verify generic offer approval

In practice, and with more complex offers, a proper approval process should be in place to ensure that the offer items have been created correctly. To save time in this lab, we're simply approving every offer item we create.

12. Click the **left arrow** next to the offer item title to return to the 'Offers' page, and you will see your iphone:17:generic offer listed.

Create Base Model Offer Item

Now that the generic offer item has been created, you can create the next priority offer item for the base model of the iPhone 17.

1. Click the blue **Create Item** button again and name the offer **iphone:17:base**
2. Because this is the next lowest priority offer item, increase the **Priority** field to **2**
3. Expand the **Device** area and give the fields these values:
 - Tier: **Base**
 - Model: **17**
 - Make: **iPhone**

When finished, the offer item should look like this (the red box is added to ensure the priority is correct):

Standard attributes

Offer name *

iphone:17:base

Description

Start date

mm / dd / yyyy, --:-- AM

End date

mm / dd / yyyy, --:-- AM

Priority ⓘ

2

^
v

Tags

Custom attributes ⓘ

Device

Tier

Base

Model

17

Make

iPhone

Base offer attributes validation

When everything is correct, click the blue **Next** button to proceed to the next step.

- This offer item should be available to everyone, so there is no eligibility requirement; however, it should be capped at 3 impressions per day. Click the '**+ Create capping**' button.
- On the new capping rule, change the **Choose capping event** to **Impression**.
- Change the **Capping event count** to **3**. Once finished, your capping rule should look like this:

Eligibility ⓘ

- ☒ All visitors
- ☐ Visitors who fall into one or more audiences
- ☐ By rule

Capping ⓘ

Capping will be applied to this offer when any of the following capping rules are met.

Choose capping event *

Impression

Capping type

☐ In total (Aggregate capping count from all profiles)

☒ Per profile (Apply cap for each profile)

Capping event count *

3

Reset capping frequency *

Daily

Every

1

Day

Cancel

Create

Base offer capping validation

Once correct, click the blue **Create** button to save the capping rule.

Notice how you could create an additional capping rule. In practice, you may want to add more than one rule. In this case, we could have added a rule to cap this if a specific event was seen, such as a purchase event. We're keeping it simple for now with a single capping rule.

Eligibility ⓘ

- ☒ All visitors
- ☐ Visitors who fall into one or more audiences
- ☐ By rule

Capping ⓘ

Capping will be applied to this offer when any of the following capping rules are met.

Capping 1				
Event	Capping event count	Type	Reset capping frequency	
Impression	3	Offer level capping	Every day	

+ Create capping

Additional capping example

The 'days' mentioned in frequency capping rules refer to days in the GMT timezone. Frequency capping with days in the logic resets at midnight, GMT.

7. Click **Next** to proceed to the review step.
8. Ensure everything appears as expected and click the **Save** button. Once saved, click **Approve**.
9. Once approved, click the left arrow next to the title and return to the offers page. You should now see two offers, each with the appropriate priority.

Offers							Edit schema ⓘ	Create item
🔍	1-2 of 2							
☐	Name	Status	Priority	Tags	Start date	End date		
☐	iphone:17:base	...	Approved	2	-	-		
☐	iphone:17:generic	...	Approved	1	-	-		

validation first two offers and their priority

Create Upper Tier Model Offer Items

Now that the generic and base model offers have been created, we can move to the offer items for the pro and ultra models. These offer items also need to include an element of eligibility because only members with a certain plan level should see these offers.

1. Following the same steps and naming patterns outlined in the above sections, create a new offer called **iphone:17:pro** and set its priority to **3**.
2. Set the **Tier** attribute to **Pro** and the other custom attributes as you did in the other offers.
3. On the 'Eligibility' step, select the **By rule** radio button.
4. The left rail should show only one Decision rule, the one created earlier called 'Upper Tier Plans'. Click the **+** icon next to that rule to add it to the canvas.
5. As mentioned earlier, the business has stated that non-fallback offers should have a frequency cap of 3 displays (or impressions) per day. Follow the steps in the previous section to create a capping rule for 3 Impressions per day. When finished, your page should look like this:

Create offer item

1 Attributes > 2 Eligibility > Review

Manage access Cancel Back Next

Offers | Draft

Decision rules

Open rule library

Q

Upper Tier Plans ⓘ +

Eligibility ⓘ

☐ All visitors

☐ Visitors who fall into one or more audiences

☒ By rule

Upper Tier Plans ⓘ ×

Total profile estimate ⓘ

Estimated qualified profiles

Refresh

Capping ⓘ

Capping will be applied to this offer when any of the following capping rules are met.

Capping 1

Event

Capping event count

Type

Reset capping frequency

Impression

3

Offer level capping

Every day

+ Create capping

Impression capping validation

5. Once you've verified that everything is correct, click **Next**. The final offer item config should look like this:

The screenshot shows the 'Create offer item' form with three sections: Standard attributes, Custom attributes, and Profile constraints. The form is titled 'Create offer item' and has a progress bar with three steps: 1 Attributes, 2 Eligibility, and 3 Review. The current step is 3 Review. There are buttons for 'Manage access', 'Cancel', 'Back', and 'Save'.

Standard attributes

Name
iphone:17:pro

Start date End date
-- --

Priority
3

Id

Custom attributes

Device

Tier
Pro

Model
17

Make
iPhone

Profile constraints

Eligibility rule

Name Id
Upper Tier Plans dps:eligibility-rule:1bb310effb1adbe7

Capping

Capping 1

Event	Capping event count	Type	Reset capping frequency
Impression	3	Offer level capping	Every day

Complete Pro offer validation

6. Once everything looks correct, **Save** and **Approve** the offer item.
7. Return to the offers page and verify that the 3 offers are there and that they each have the proper priority.
8. Create the final offer item and name it **iphone:17:ultra**, give it a priority of **4**, and set the other custom attributes with the same values as the other offers.
9. As with the last offer item, set the eligibility to the 'Upper Tier Plan' Decision rule and set a frequency capping of 3 impressions a day. When finished, your offer item should

look like this:

Create offer item

Attributes > Eligibility > Review

Manage access Cancel Back Save

Offers | Draft

Standard attributes

Name

iphone:17:ultra

Start date

End date

--

--

Priority

4

Id

Custom attributes

Device

Tier

Ultra

Model

17

Make

iPhone

Profile constraints

Eligibility rule

Name

Id

Upper Tier Plansdps:eligibility-rule:1bb310effb1adbe7

Capping

Capping 1

Event

Capping event count

Type

Reset capping frequency

Impression3Offer level cappingEvery day

Complete Ultra validation

10. Once you've verified that all of the settings are correct, save and approve this offer item. You should now see all four of the offer items, each with a unique priority.

Hide panel

Catalogs

Offers

Collections

Offers

Edit schema Create item

1-4 of 4

☐	Name	Status	Priority	Tags	Start date	End date	Modified
☐	iphone:17:ultra	Approved	4		--	--	12/8/25, 2:25 PM
☐	iphone:17:pro	Approved	3		--	--	12/8/25, 2:08 PM
☐	iphone:17:base	Approved	2		--	--	12/6/25, 1:17 AM
☐	iphone:17:generic	Approved	1		--	--	12/6/25, 12:50 AM

Final 4 offer validation

The instructions for this lab are emphatic about ensuring that the priorities are different for each offer item. In this simple use case, it's important, but there is nothing in the UI that forces you to give each offer item a unique priority. Over time, you will likely have multiple offer items with the same priority. You'll see why this is important to understand in later sections.

Recap

You defined multiple offers for the different iPhone 17 tiers, including a generic fallback offer and tier-specific offers (base, pro, and ultra). You've also approved all four offer items with the correct priorities, eligibility, and impression capping settings so they're ready for use in your Decisioning package.

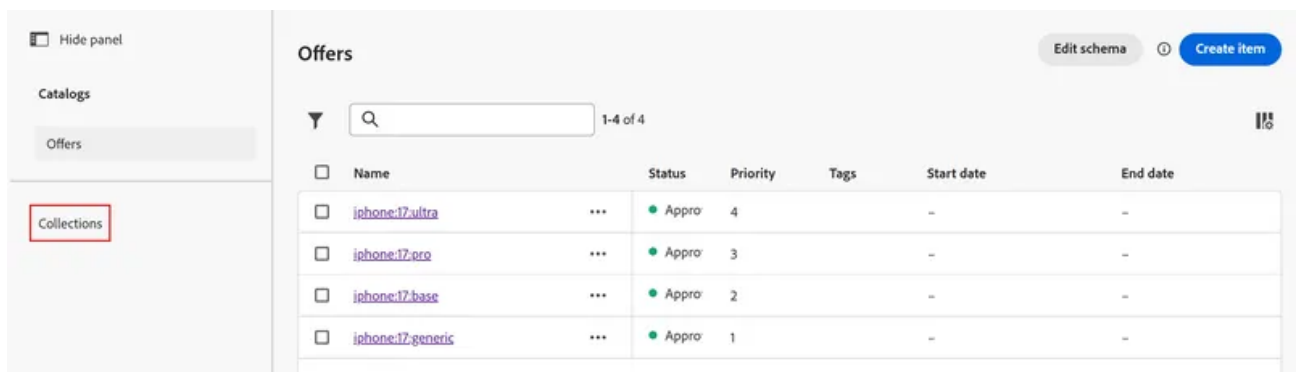
6.1.4. Create Offer Collection

Objective

Now that your offers have been created, they need to be organized into a collection. A collection has one or more offer items, and an offer item can be in more than one collection.

Create the iPhone Offer Collection

1. If necessary, expand **Decisioning** in the left rail, then click **Catalogs**. You will see the four offers you created in the previous section.
2. Click on **Collections** just left of the offer name



Navigate to Collections

3. Click the blue **Create collection** to create the new collection.
4. Name the collection **iPhone 17 Collection**
5. In the 'Collection rules' section, click on the text box that contains the text **Click to create a decision item**. Once clicked on, the options for creating the rule will appear.

Details

Name *

iPhone 17 Collection

Description

Catalog

Offers

Collection rules ⓘ

* Required

Items that meet below rules will be included in this collection.

Preview collection

NUMBER OF ITEMS

Select attribute

Select operator

+ Add rule

Initial collection validation

- Click the **Select attribute** button, then navigate through the offer item schema by clicking on **Device > Make**. Click **Save**, and you'll see that the 'Make' attribute is now in the decision rule.

Collection rules ⓘ

* Required

Items that meet below rules will be included in this collection.

Preview collection

NUMBER OF ITEMS

Make

×

Equals

+ Add rule

Select attribute demonstration

Notice that the options available to you are the same configurable fields you used when creating the offer items. Since a collection is a grouping of offer items, it makes sense that the rules to group them depend on their attributes.

7. Leave the 'Equals' operator in place and enter the text **iPhone** in the value field, and you should see that the number of items changes to 4, indicating that all of your offer items meet that criteria

Details

Name *

iPhone 17 Collection

Description

Catalog

Offers

Collection rules ⓘ ★ Required

Items that meet below rules will be included in this collection. Preview collection

NUMBER OF ITEMS 4

Make X Equals iPhone

+ Add rule

Verify 4 offers are in the collection

You can also click the **Preview Collection** button and see the offer items that meet the criteria.

8. With all four of the offer items selected, click the blue **Create** button, and you'll be taken to a page that shows your newly created collection.

Collections ⓘ Create collection

1 of 1

Name	Catalog	Modified
iPhone 17 Collection	Offers	12/09/2025

Complete Collection validation

A collection is more than just a means of organization. In the steps ahead, you'll see that in Decisioning, we apply selection logic to a collection of offers. Thinking about an enterprise-sized implementation, it's not hard to picture how many offers would be created over the years of use. In order to determine which offers a selection strategy should apply to brings to light just how important proper collection management is.

In this case, a collection with just "iPhone" as the criteria would bring in too many offers after a few years of iPhone releases. We could have used additional criteria like 'Make equals 17' or used AEP Tags to tag offers for a specific campaign. But for simplicity, we're using this simple logic to create a collection.

Recap

You have now created an offer collection that groups together the offer items you previously built. You added all the iPhone 17 offers into a collection and defined a rule based on offer attributes (like device make) so that only relevant offers belong to this collection.

6.1.5. Create Ranking Formula

Objective

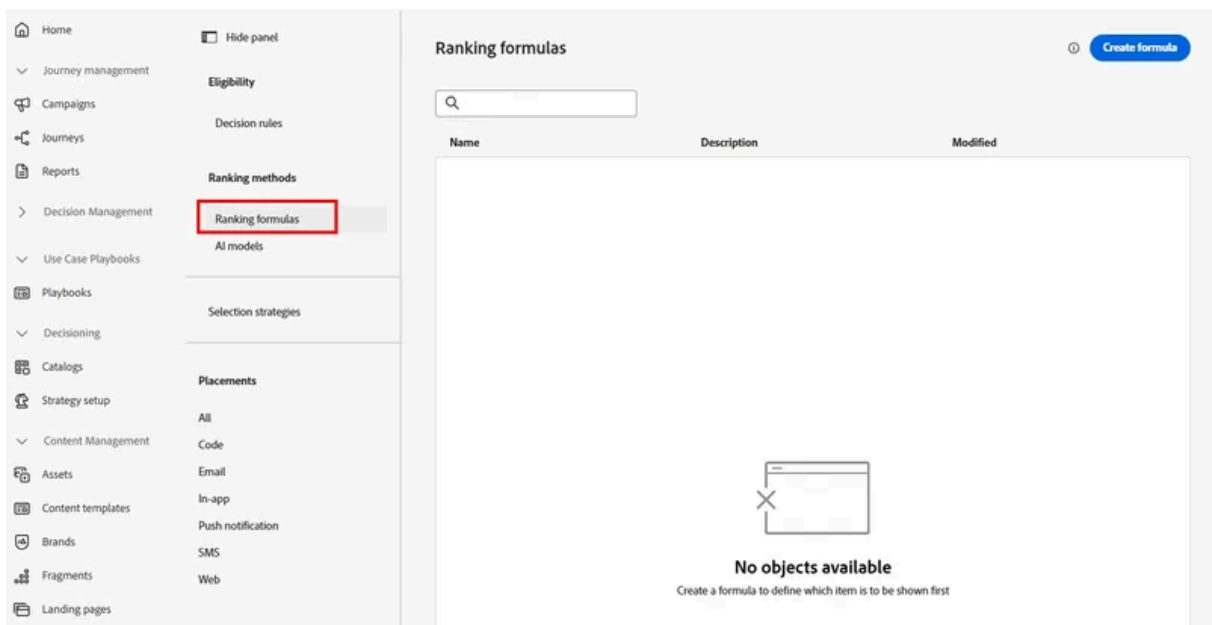
Now that all the offer items have been created, prioritized, had eligibility applied, and organized into a collection, we can turn our attention to determining how they will be ranked for a given profile. This is done by creating a ranking formula.

A ranking formula dynamically boosts specific offer prioritizations so they "rise to the top," based on criteria from the profile interacting with the Web/Mobile property or the Experience Event itself.

In this lab scenario, we'll pretend that the research marketing team for Connection 5G showed that those under age 39 would be drawn to the Ultra or Pro tiers and those 40-59 would be drawn to the base and pro tiers. And since Connection 5G would rather sell higher-tier phones, all things being equal, the ultra model would be presented first for those under 39, with the pro model being presented first for those 40-59. This section will show you how to create a ranking formula to meet those business requirements.

Create a Ranking Formula and Default Expression

1. If necessary, expand **Decisioning** in the left rail and click on **Strategy setup**. You will land on the 'Decisioning Rules' page and should see the 'Upper Tier Plans' Decision Rule that you created previously and used as eligibility requirements for the upper-tier phone offer items.
2. Click on **Ranking formulas** under the 'Ranking methods' menu, and you'll be taken to an empty page since you don't have any ranking formulas yet.



Navigate to ranking formula

3. Click the blue **Create formula** button to start creating a new ranking formula
4. Name the ranking formula **iPhone 17 Ranking Formula**

When an Experience Event is sent to Edge Data Collection with the required parameters to request an offer from an active Decisioning package, all offers in that package are evaluated using the ranking formula. Each offer will either keep its original priority or have its priority dynamically adjusted based on the profile that triggered the Experience Event.

5. Scroll to the bottom of the 'Criteria' section and click the **</>** icon of the bottom-most text box and select the **Offer priority score** variable.

Criterion 1

⋮

▼ Specify decision items

✕

Click to create a decision item...

+

 Add item matching condition

Specify additional conditions (optional) ⓘ

+

 Add condition

Create expression to assign a ranking score

</>

Start typing the expression

+

 Add criterion

Create expression for items that don't meet any of the criteria

</>

Start typing the expression

Variables

Offer priority score

AI model score

Use offer priority score in a formula

The default expression should now be set like this:

Criterion 1

⋮

Specify decision items

✕

Click to create a decision item...

+ Add item matching condition

Specify additional conditions (optional) ⓘ

+ Add condition

Create expression to assign a ranking score

</>

Start typing the expression

+ Add criterion

Create expression for items that don't meet any of the criteria

offer_experience.decisioning.decisionitem.itemPriority

</>

Start typing the expression

Validate default offer priority score

This bottom text box is the default expression applied to any offer item that doesn't meet any priority adjustment criteria. In this case, this will simply be the priority assigned to the offer when it was created. If no default priority score is given to the collection that this ranking formula will execute on, then you'd want to assign a default score

Create Priority Adjusting Rules

Now that there is a default expression, we can start adding rules that will dynamically adjust the priority based on the user's age.

One way to think about priority adjustment rules is to treat them as standard if/then statements that only apply to certain offers. If the test proves true, then adjust the priority for offers that meet a given criterion. The UI does arrange these in a slightly different order, as called out in this screenshot.

Criterion 1



Specify decision items



3

Click to create a decision item...

To offer items that meet this criterion



Add item matching condition

Specify additional conditions (optional) ?

1



Add condition

If this is true

Create expression to assign a ranking score

2

Then apply this priority adjustment



Start typing the expression

If, then, and where on priority adjustment rules

The "if" is optional because one could apply a priority adjustment rule where an offer meets a specific criterion without a conditional statement first. Expanding on our example in this guide, imagine we had several offers with a phone OS attribute (Android vs. iOS). One could boost the priority of all iPhone offers where the profile's preferred OS is iOS. There is no "if." Just "adjust the score where offer attribute = profile attribute." Below is an image similar to the one above that outlines this idea without a conditional statement.

Criterion 1

⋮

▼ Specify decision items

×

2

Click to create a decision item...

To offer items that meet this criterion

+

Add item matching condition

Specify additional conditions (optional) ⓘ

+

Add condition

Create expression to assign a ranking score

1

Apply this expression

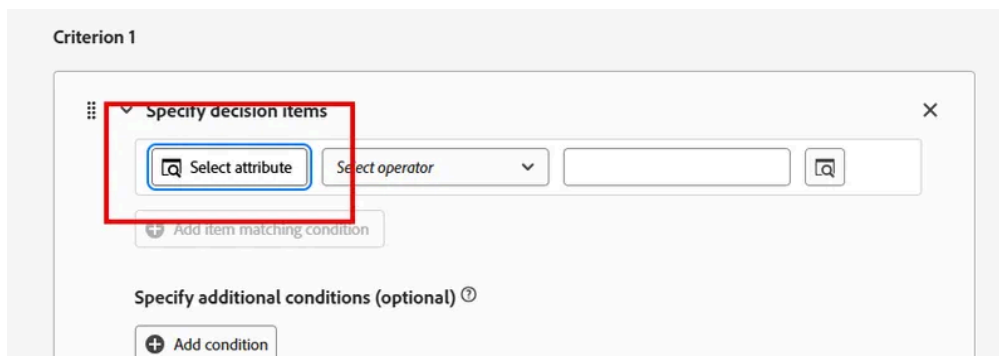
</>

Start typing the expression

Two step create ranking rule criterion

Create Criterion 1: Adjustment Rule for those Younger than 39

1. We'll start by creating the ranking rule for the Ultra tier offer item. Click into the first textbox in the **Criterion 1** section, then click on the **Select attribute** button when it appears.



Attribute for Criterion one

2. When the 'Select an attribute' dialog box opens, click on **Offer name**. Once selected, click **Save**.

The 'Decision attribute' refers to elements of the offer item. Since this is where you outline which offer items the criteria will apply to, the only options available to you are attributes of the offer item.

3. Leave the operator set to 'Equals' and in the remaining textbox, enter the name of the ultra tier offer item, which is **iphone:17:ultra**. After entering the text, the UI will update and reflect that the matching condition has been accepted.
4. Click **+Add Condition**, then click into the **new text box that appears** (it'll have the text '*Click to create a decision item...*' in it)
5. Click the now available **Select attribute** option.
6. When the 'Select an attribute' dialog box opens, click on **Profile attributes > Person** (you'll likely need to scroll down) **> Birth Year**. Once selected, click **Save**.

'Profile attributes' refers to the user or profile that sent the Experience Event, and 'Context data' refers to elements in the Experience Event itself, such as URL, page name, or other attributes of the Experience Event payload.

7. Change the operator to **Greater than** and enter the birth year **1986** (the UI will put a comma in the year, which is expected). After entering, the UI will update to reflect that the condition has been accepted. Since the business use case is to offer the Ultra tier to anyone under 40, we want to adjust the priority for anyone born after 1986.

As mentioned earlier, the UI indicates that these additional conditions are 'optional.' That is true because one may want to dynamically adjust the priority on a set of offer items without any additional criteria. It may be that the same offer items could be used in a different collection and ranked with a different set of ranking rules. Since we're only using a single set of offer items, we'll be using additional conditions to adjust the priority.

8. The original priority for the Ultra tier offer item is 4. To boost the priority, we'll multiply that by 100. To do that, click the `</>` icon next to the last text box and select the **Offer priority score** variable. Add a ***100** after the automatically entered text. This expression will multiply the original priority (4) by 100 and give it a new priority of 400.

Your rule should now look like this:

Criterion 1

⋮ ▾ Specify decision items ✕

Offer name Equals iphone:17:ultra

+ Add item matching condition

Specify additional conditions (optional) ⓘ

Birth year Greater than 1,986 ✕

+ Add condition

Create expression to assign a ranking score

offer_experience.decisioning.decisionitem.itemPriority*100 `</>` ✎

Start typing the expression

+ Add criterion

Create expression for items that don't meet any of the criteria

offer_experience.decisioning.decisionitem.itemPriority `</>` ✎

Start typing the expression

Validate criterion rule one

Why multiply by 100? The idea is that if you want to ensure your priorities are adjusted well above the other priorities, and 100 is just a way of doing simple math to make that happen. Ranking formulas can be complicated, as you'll see in the next section, so keeping the math simple is helpful.

Additionally, while we used multiplication to increase the priority score, other mathematical expressions could have been used to decrease the priority score. Generally speaking, however, it's easier to make the wanted offers 'float to the top' than it is to make offers you don't want 'sink to the bottom.'

Create Criterion 2: Adjustment Rule for those 49-50

1. Immediately below the adjusting rule you just created, click the **+ Add Criterion** button.
2. Create a matching condition for where the **Offer name** does NOT equal **iphone:17:ultra**.

We want this rule to apply to all of the other offer items. More details on why are further along on this page, but you should be very careful about using this kind of logic in practice, as it would apply to every offer in the collection that doesn't have this value. In our case, that's fine, but it may not be in other use cases.

3. Add the condition that this rule should apply to anyone with a birth year greater than **1966** (anyone younger than 60).
4. Just like the previous rule, multiply the offer item's default priority score by 100. When finished, your 'Criterion 2' rule should look like this:

Criterion 2

Specify decision items

Offer name

Not equals

iphone:17:ultra

+

Add item matching condition

Specify additional conditions (optional)

Birth year

Greater than

1,966

+

Add condition

Create expression to assign a ranking score

offer.

experience.decisioning.decisionitem.itemPriority*100

Start typing the expression

+

 Add criterion

Create expression for items that don't meet any of the criteria

offer._experience.decisioning.decisionitem.itemPriority

Start typing the expression

Validate criterion 2 in the ranking formula

Using ranking formulas and eligibility rules together can feel complex, but here's the core idea:

- **Ranking formulas** dynamically adjust the priority scores and, therefore, the order of the offers.
- **Eligibility rules** (such as decision rules and frequency caps) remove offers from the ordered list if the user isn't allowed to see them.

Let's consider how the offers would be ordered given these examples and the ranking formula you just created:

Birth Year = 1990

- Ultra Priority becomes **400**
 - Pro = **3**, Base = **2**, Generic = **1**
- Result: Ultra shows first (up to 3 times), then Pro, Base, and finally Generic.

Birth Year = 1970

- Ultra priority remains at **4**
 - Pro becomes **300**, Base = **200**, and Generic = **100**
- Result: Pro shows first (3 times), then Base, then Generic. Ultra is ordered last because its priority (4) is lower than Generic (100).

When eligibility is applied via decision rules and frequency capping, then

- Users born in 1990 with a **plan ID = 1** will have Ultra and Pro offers removed—even though they ranked highest. The user only sees the Base and Generic offers because Ultra and Pro tiers have an additional condition: only users with **plan IDs 2 or 3** can see them.
- Since the Generic offer has no frequency capping rules, the **1970** birth year user will never see the Ultra offer, as its priority score is lower than the Generic's boosted score.

5. With all of the rules and the default priority score in place, scroll back to the top and click the blue **Create** button in the upper right corner.

You should now be taken back to the 'Strategy Setup' page, and you will see the single Ranking Formula that you just created.

What happens if two offers result in the same priority? Offers with the same priority score will be chosen at random for return to the requesting system.

Recap

On this page, you built a ranking formula that determines how offer items are ordered dynamically for each profile. You also defined a default expression (the original priority score), and then added priority-adjustment rules that boost offer priorities based on profile criteria (such as age). This ranking logic ensures that relevant offers (like Ultra or Pro tiers for specific age ranges) rise to the top when evaluated.

6.1.6. Create Selection Strategy

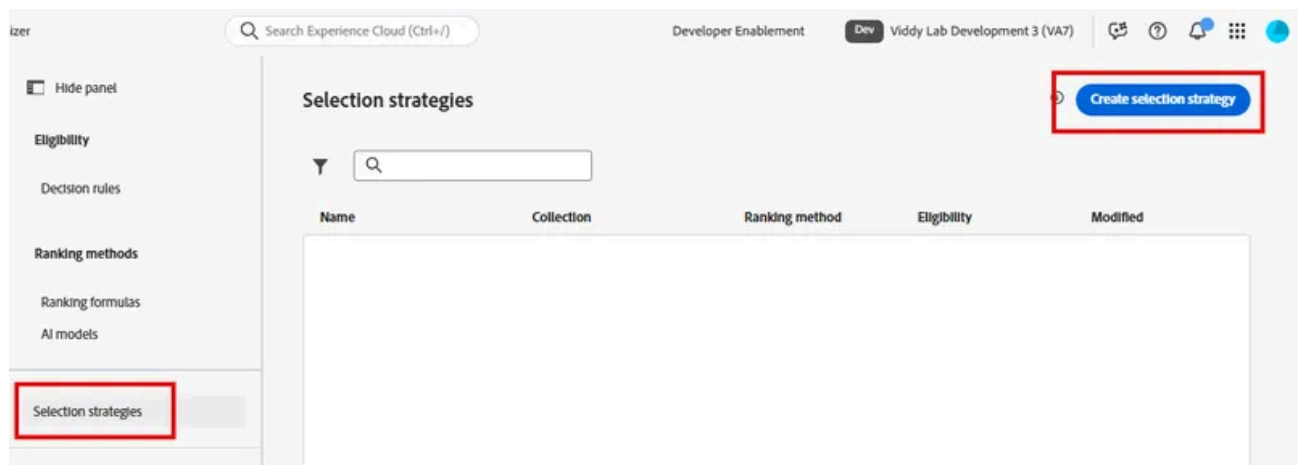
Objective

Up to this point, you've created offers, defined offer eligibility with a decision rule, gathered them into a collection, and created a formula that dynamically re-orders them based on attributes of the profile requesting the personalization. Because we're only using a single set of 4 offers for a single use case, it's tempting to think that each of these elements is related, especially when we named them similarly. However, it's important to think more abstractly when considering a long-term strategy and enterprise-sized scope. Offers could be sorted into one or many collections. Ranking formulas could be applied to any collection of offers. In actuality, the first time you actually connect these elements is when creating a Selection Strategy.

Imagine that we had hundreds of offers utilized in forty collections and a dozen or so ranking formulas. How would a decision package know which ranking formula to apply to which collection of offers? The selection strategy makes that connection. When you add Decisioning to a channel, what you are adding is one (or many) Selection Strategy(ies).

Create the Selection Strategy

1. If necessary, expand **Decisioning** in the left rail and click on **Strategy setup**. You will land on the 'Decisioning Rules' page and should see the 'Upper Tier Plans' Decision Rule that you created previously and used as eligibility requirements for the upper-tier phone offer items.
2. Click on **Selection Strategies** just below the 'Ranking methods' menu. With no selection strategies available, click the blue **Create selection strategy** button.



Navigate to Selection Strategies

3. Name the selection strategy **iPhone 17 Selection Strategy**

4. You can see that a selection strategy requires 3 things.

- A collection of offers
- Eligibility requirements
- A Ranking Method

Click the **Select Collection** button, tick the box next to the only Collection you have (**iPhone 17 Collection**), and click **Save**.

5. Leave the 'Eligibility' drop-down set to All Visitors.

Eligibility can be applied at the offer level, the selection strategy level, or the Journey/Campaign level via the criteria for entering the Journey or Campaign. It all depends on the use case you are trying to realize. If you click on the **Eligibility** drop-down, you'll see the same Audience and Decision Rule options that you saw at the offer level. In our use case, we only wanted to limit specific offers, so it made sense to do eligibility at the offer level.

6. Set the **Ranking method** to **formula**, then click the **Select formula** button

You may have noticed the 'Offer Priority' and 'AI Model' options in the Ranking method drop-down. If you truly only wanted to return offers using only their original priority, then you would choose the 'Offer Priority' option.

The AI Model option uses an AI model that analyzes impressions, clicks, and conversions for returned offers to determine which offer to display to the individual. We will not be using them in this lab as there are minimum data thresholds as well as two weeks required to train the models.

7. Tick the box next to the only Ranking formula you have (**iPhone 17 Ranking Formula**) and click **Save**. When finished, your selection strategy should look like this:

Create selection strategy

Manage access Cancel Create

* Required

Details

Selection strategy name *

iPhone 17 Selection Strategy

Catalog

Offers

Collection * ⓘ

iPhone 17 Collection

Edit

Eligibility ⓘ

Eligibility

All visitors

Ranking method ⓘ

Ranking method

Formula

iPhone 17 Ranking Formula

Edit

Complete Selection Strategy validation

8. Once your selection strategy is correct, click the blue **Create** button.

You should now see your iPhone 17 Selection Strategy in the 'Selection strategy' menu

Decisioning allows for very simple or very complex offer selection and ordering. On the simple end, you could have a collection of offers with their default priority, an eligibility set to all visitors, and the Ranking method of 'Offer Priority', and all end users would see the offers in the order of their original priority scores. At the other extreme, you could have a huge collection with complex initial priority scores, a bespoke Ranking formula, and layered eligibility rules at both the offer and selection strategy level. What you built in this lab sits in the middle and was designed to demonstrate the different ways decisioning packages could be configured.

Recap

On this page, you created a selection strategy that ties together the core components you've built so far — the offer collection, eligibility rules, and ranking formula.

6.1.7. Create Code-Based Experience Channel

Objective

Recall that the business requirements are that any of Connection 5G's systems should be able to return an appropriate offer. Whether it's a customer agent's computer, an in-store kiosk, a mobile app, or the website, the customer should receive the same offer experience. The only AJO channel that can do that is a Code-based Experience (CBE), one of the inbound AJO channels. While a CBE can return HTML, its primary function is to return information about what offer should be presented to the receiving system, with that system knowing what to do with that offer information. Unlike the web channel, CBEs aren't automatically rendered or reported. While it's a little more manual work for the customer, they offer a lot of flexibility as they can be configured to return JSON that any mobile, web, or IOT system can use to execute decisions.

1. If necessary, expand the **Administration** menu item in the left rail (you will likely need to scroll down) and click on **Channels**. You will land on the 'Channel configurations' page.
2. Click the blue **Create channel configuration** button
3. On the 'Channel configuration details' page, name the channel **jsonOffer_cbe**

Since a CBE can be called by any number of clients across *N* number of platforms, we're going to name this CBE something generic to location, but specific to the fact that it returns offers in the JSON format.

4. Set the **Select channel** drop-down to **Code-based experience**.

We won't set a Marketing action in this lab because it adds unneeded complexity for our demonstration, but since CBEs can be accessed by any number of systems, you'll want to ensure that in a real use case, you'd set all the possible marketing actions for this channel so that DULE labels are enforced.

5. Tick the **Web** box in the 'Code-based experience settings' area and keep the **Single page** option selected.

6. In the **Page URL** text box, enter the text `https://connection5g.com/home`

7. In the **Location on page** text box, enter the text **jsonOfferContainer**

Not every Experience Event sent to the Edge triggers a request for personalized offers. You'll create a Journey in the next section where this CBE will be configured with the selection strategy you just configured. The 'Location on page' setting is the name of the parameter passed in Experience Events that tells the Experience Edge to return any offers that are assigned to that CBE. It's also often referred to as a surface. Be it a mobile app, web page, or some other IOT device, if the jsonOfferContainer value is passed to the Edge, along with the correct eventType via an Experience Event, the Edge will execute the logic configured thus far in the lab and return the appropriate offer.

8. Click the **JSON** radio button in the 'Format' section. When finished, your CBE channel config should look like this:

Channel configuration details ⓘ

When setting up a channel configuration, select the channel it applies to, and define all the technical parameters required for your sending, such as email type, sender name, mobile apps, SMS configuration, and more.

Name *

JsonOffer_cbe ✓

Description

Access management labels

No labels selected

Select channel *

Code-based experience ▼

Marketing action ⓘ

Select one or multiple marketing actions ▼

Code-based experience settings

Platform *

☒ Web ☐ IOS ☐ Android ☐ Other

Web

☒ Single page ☐ Pages matching rule ⓘ

Page URL *

https://connection5g.com/home ✓ ▼

Location on page ⓘ *

JsonOfferContainer ✓ ▼

Content

Format *

☐ HTML ☒ JSON

Complete CBE Validation

9. Once everything looks correct, click the blue **Submit** button in the upper right corner.

Once it saves, you will be taken back to the Channel configuration page, and you should see your newly created CBE.

Recap

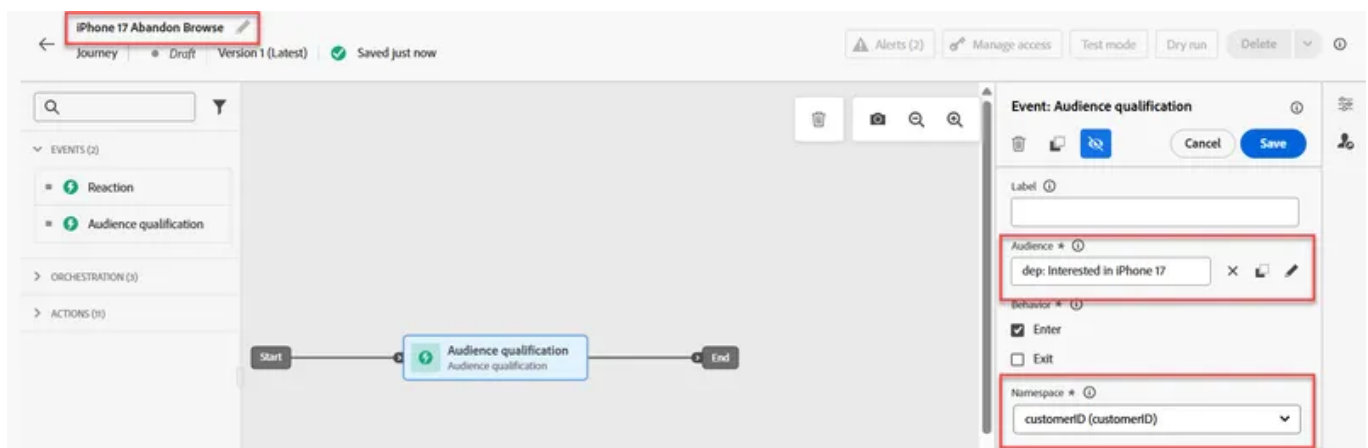
On this page, you configured a Code-Based Experience (CBE) channel and set up a new inbound channel that can return offer decisions in JSON format so external systems (like web pages, apps, or kiosks) can request and receive the appropriate offers based on the selection strategy you built earlier.

6.1.8. Create the Journey

Objective

Name and Define Entrance Criteria

1. If necessary, expand the **Journey management** menu item in the left rail and click on **Journeys**. You will land on the 'Journeys' page.
2. Click on the blue **Create Journey** button.
3. When the 'Create a Journey' overlay appears, select **Create from scratch** and click **Confirm**
4. In the right rail, name the Journey **iPhone 17 Abandon Browse** and click the blue **Save** button so that you can start adding actions to the Journey canvas.
5. Drag the **Audience Qualification** event onto the canvas.
6. In the right rail, click the **Pencil** icon to select the audience for this event.
7. Select the **dep: Interested in iPhone 17** audience.
8. Ensure that the **Namespace** drop-down is set to **customerID**. At this point, your Journey should look like this:



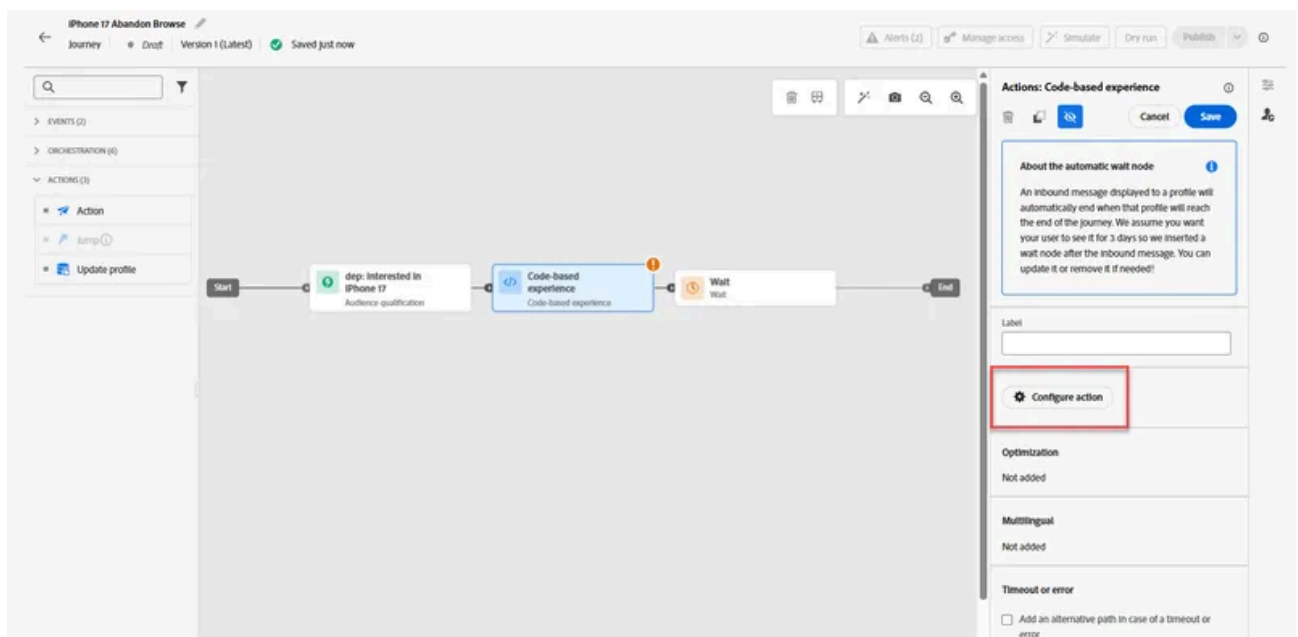
Initial Journey creation validation

8. Once everyone looks correct, click the blue **Save** button to save your progress.

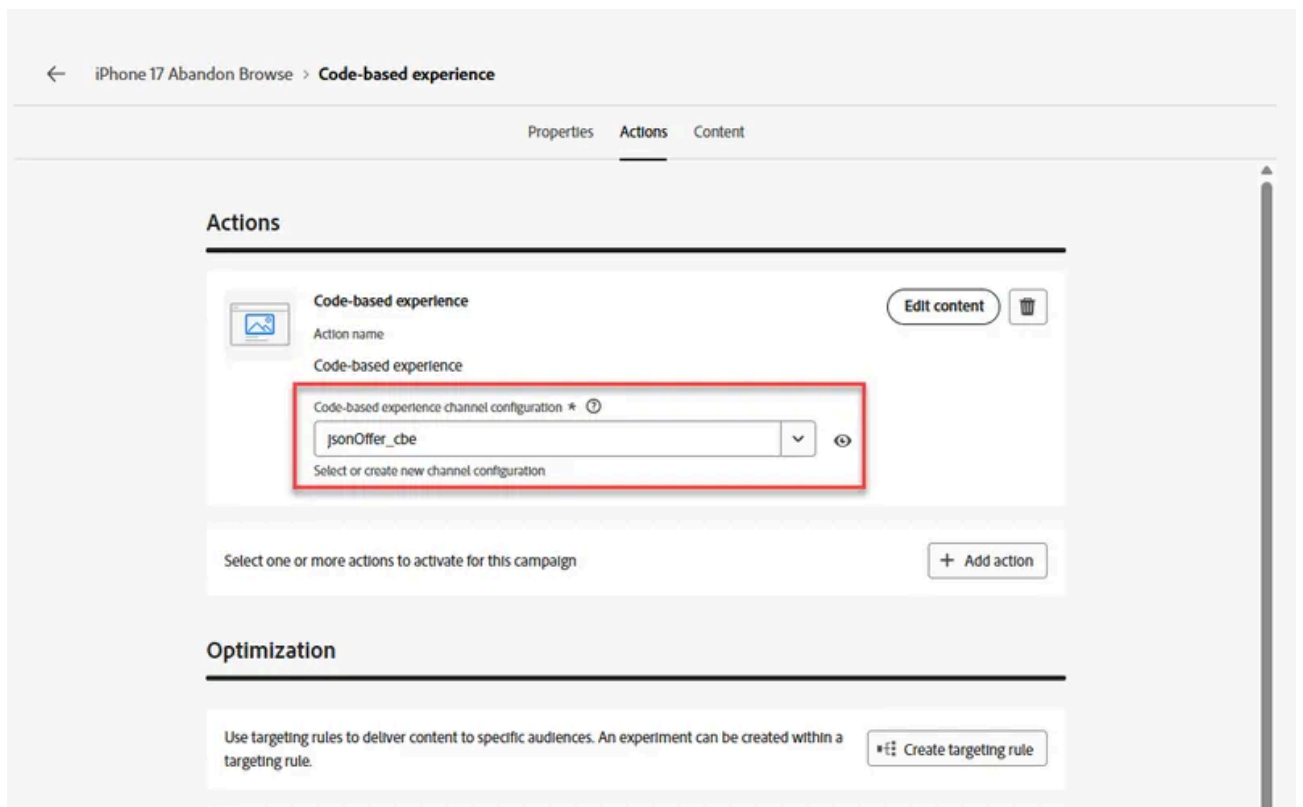
The 'dep: Interested in iPhone 17' audience is a streaming audience where the entrance criteria is viewing the fictional Connection 5G iPhone 17 overview page 3 times in the same day. Like many product overview pages, Connection 5G's iPhone 17 overview page is a dynamic page with multiple elements that update without requiring the page to reload. One can compare the different tiers of the iPhone 17 and their features on this single page. As such, if someone views this page 3 times on the same day, then they likely have an interest in the iPhone 17. However, since not every element of the page is tagged and measured, Connection 5G will use the age of authenticated users to determine the tier of phone to display to them as they interact with different touchpoints of the Connection 5G brand.

Configure the CBE and Decision Policy

1. Expand the **Actions** accordion just left of the canvas, drag the **Action** element onto the canvas, and connect it to the first node.
2. When the 'Select action type' overlay appears, select the **Code-based experience** action and click the blue **Add** button.
3. In the now visible 'Action:Code-based experience' properties, click the **Configure Action** button.

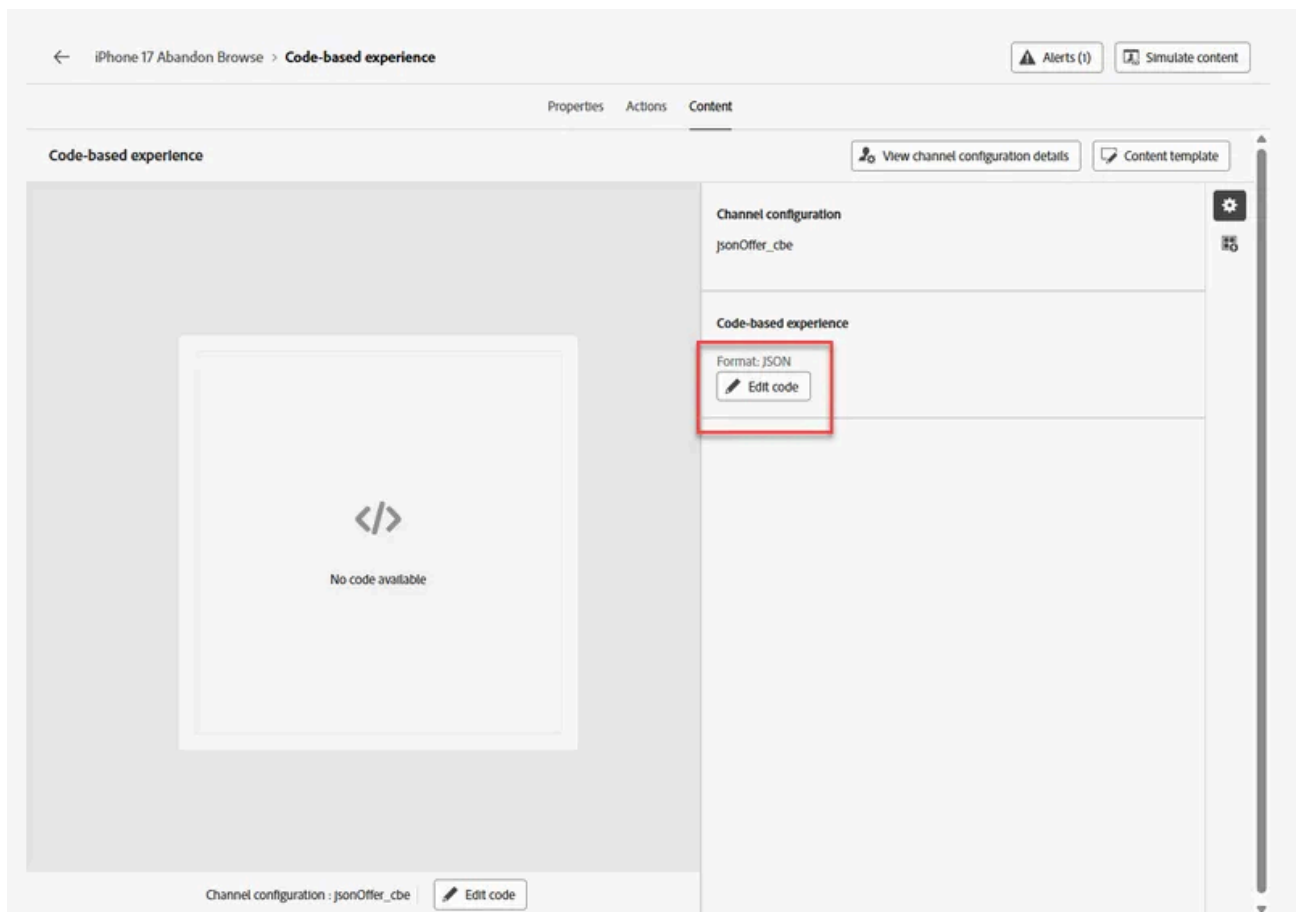


4. Change the **Code-base configuration** dropdown to the **jsonOffer_cbe** cbe that you created in the last section.



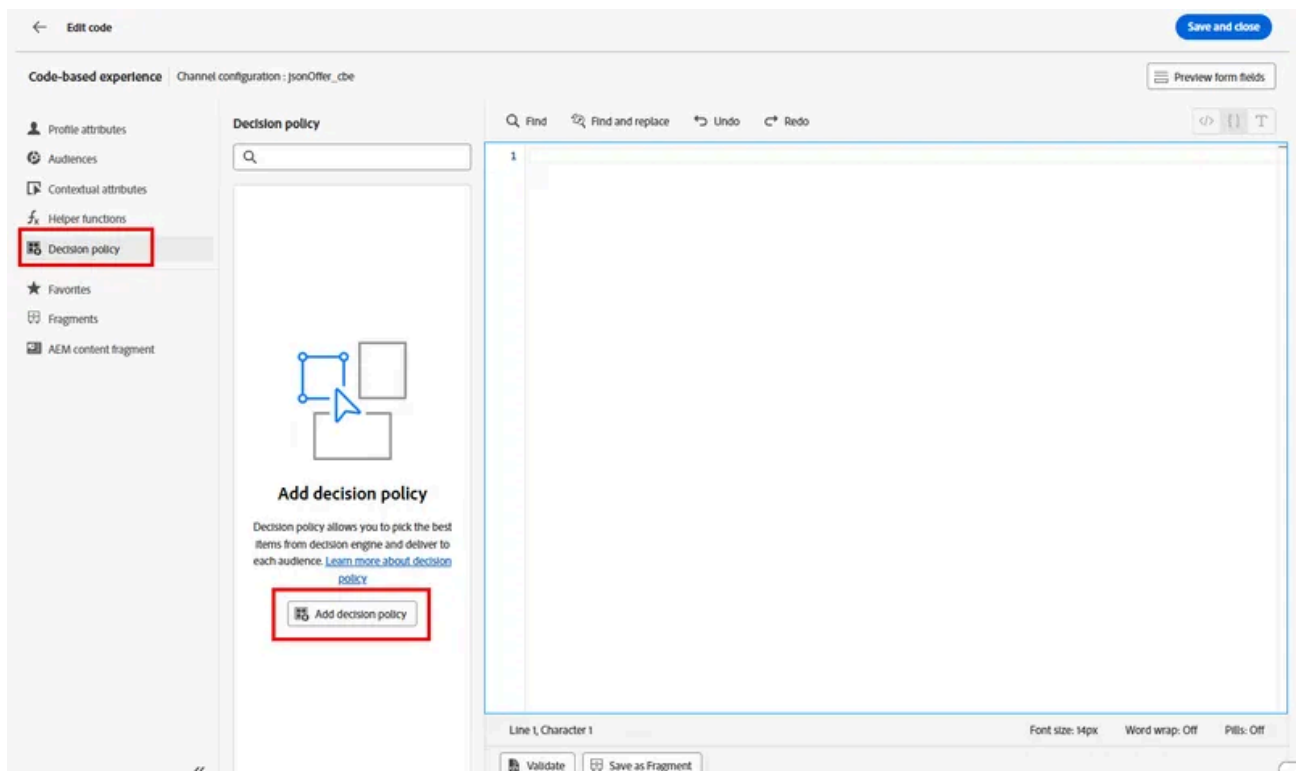
Select the JSON cbe

3. Click the **Edit content** button just above the 'Code-based configuration' drop-down.
4. On the resulting Code-base experience editor screen, click the **Edit code** button.



The resulting screen is where you'll add the JSON that'll be returned to the Experience Event requests

5. On the far left side of the code editor, click the **Decision policy** menu item, followed by a click on the **Add decision policy** button in the new menu.



Navigate to Decision Policy

If a selection strategy is where you tie an offer collection to a ranking method (and apply strategy-level eligibility), then a decision policy is where you tie a selection strategy to a specific delivery of a channel.

6. Name this decision policy **iPhone 17 DP** and leave the Number of items set to 1.

Up to this point, we've configured the offers and how to order them, but we haven't configured how many we want in the response. This is where you configure how many offers should be returned.

7. Click the blue **Next** button, and this is where you'll add the selection strategy. Click the **+Add** button (you may need to scroll down to see it), and choose **Selection strategy**.
8. Tick the box next to the only selection strategy you should have (**iPhone 17 Selection Strategy**) and click **Save**. When finished, you should see this:

Code-based experience Channel configuration : jsonOffer_cbe

Profile attributes Decision policy

Find Find and replace Undo Redo

Create decision policy

Details Strategies Review

Cancel Back Next

Strategy sequence * Required

This sequence will determine the order in which selection strategies and decision items are evaluated. Strategies within groups will be evaluated together.

1 iPhone 17 Selection Strategy ITEMS 4

+

Add

Fallback Items (optional) ⓘ

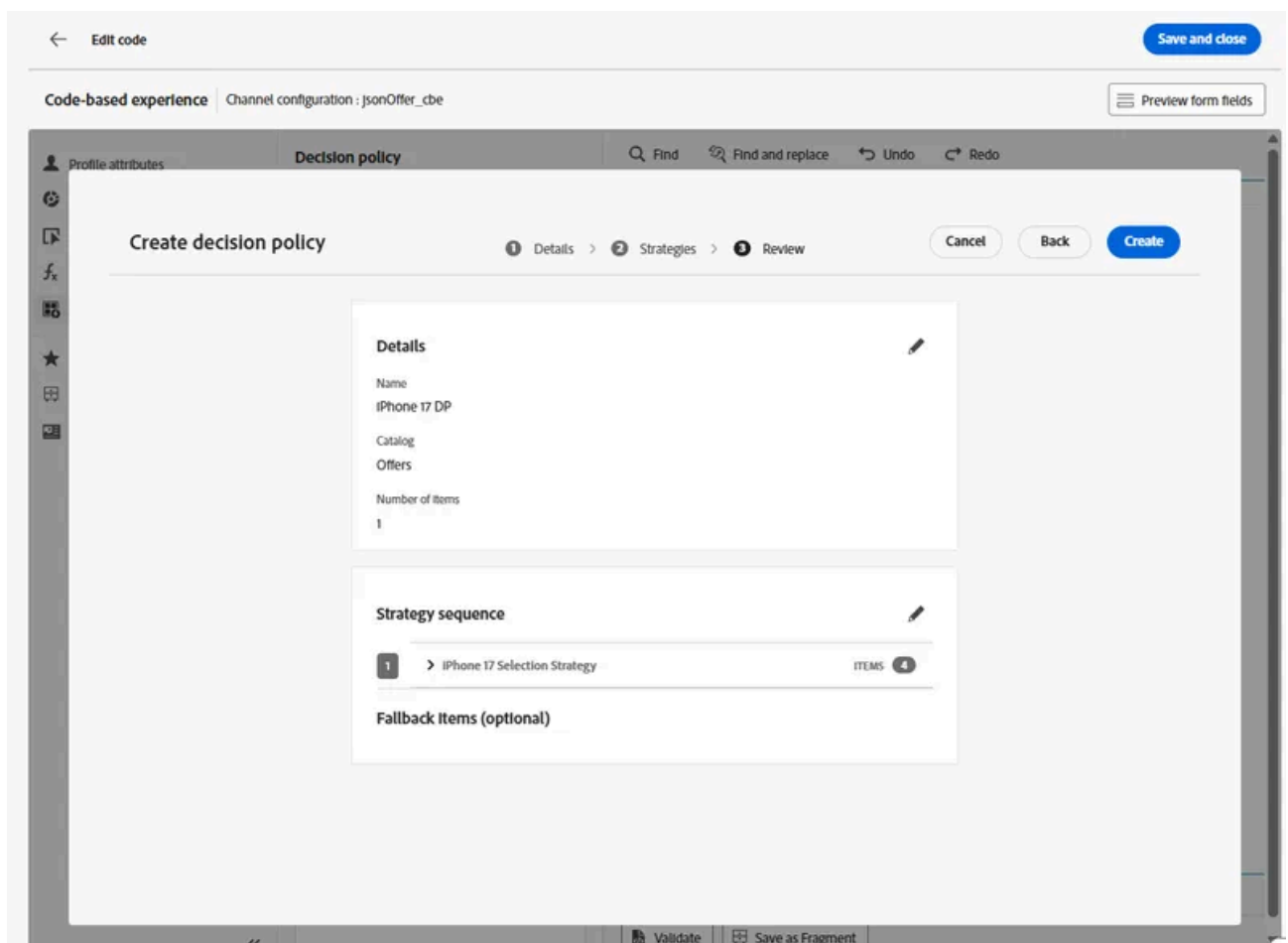
Select fallback

Select the correct selection strategy

Note how you can add multiple selection strategies or just add the decision items themselves. When would you use multiple selection strategies? Imagine that you have a 4 X 4 grid of recommendations on one of your digital properties. You want to fill all of them with 16 offers. You may have those offers spread across a few collections, or perhaps the first two rows require one selection strategy, while the bottom two rows need a different strategy. In the previous screen, you would have chosen 16 and then used this screen to add as many selection strategies or offers as needed to reach 16.

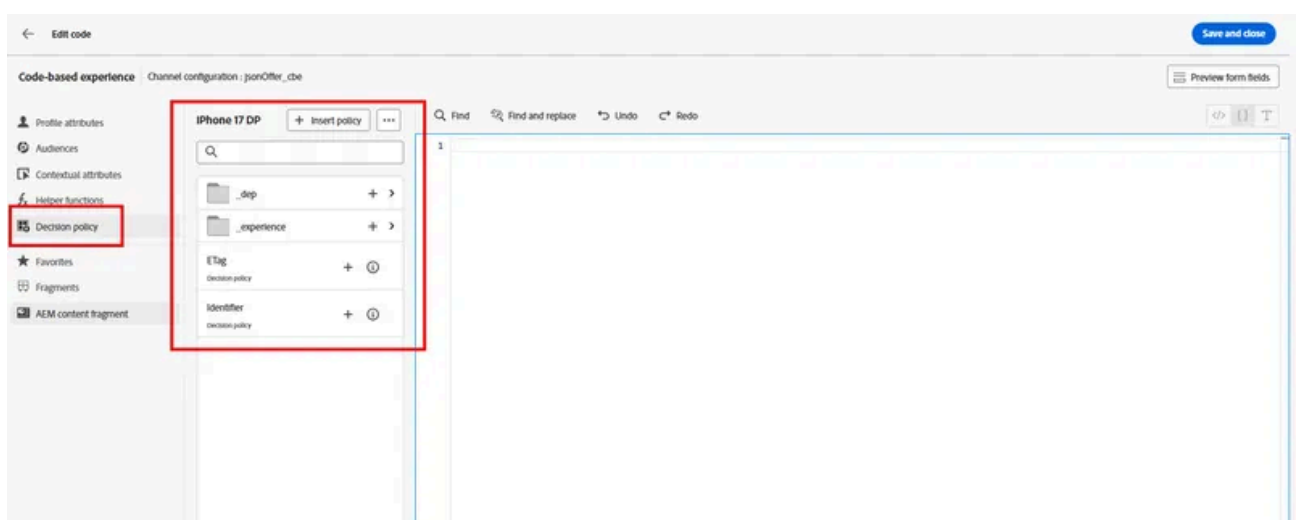
The fallback offer is optional because it would only apply if it were possible for end users to be (or become) ineligible for any of the offers. In our case, our selection strategy was for all visitors, and the only people who would reach the CBE node were those who entered the Journey. Being authenticated is a requirement for Journey entrance (the namespace set in the Journey is one they'd only have if they were authenticated). We also built a fallback offer into our Ranking formula, so in our case, there's no need to set this fallback offer.

9. Click the blue **Next** button to review the decision policy.



Review decision policy

10. Once everything looks correct, click the blue **Create** button. Once it's created, you'll be taken back to the expression editor page.
11. If you should see a screen similar to the one below. If not, click on **Decision policy** again, and you'll see your decision policy appear.



Decision policy is ready

13. Click the **+ Insert policy** button, and you'll see a ForEach loop appear in the code editor:

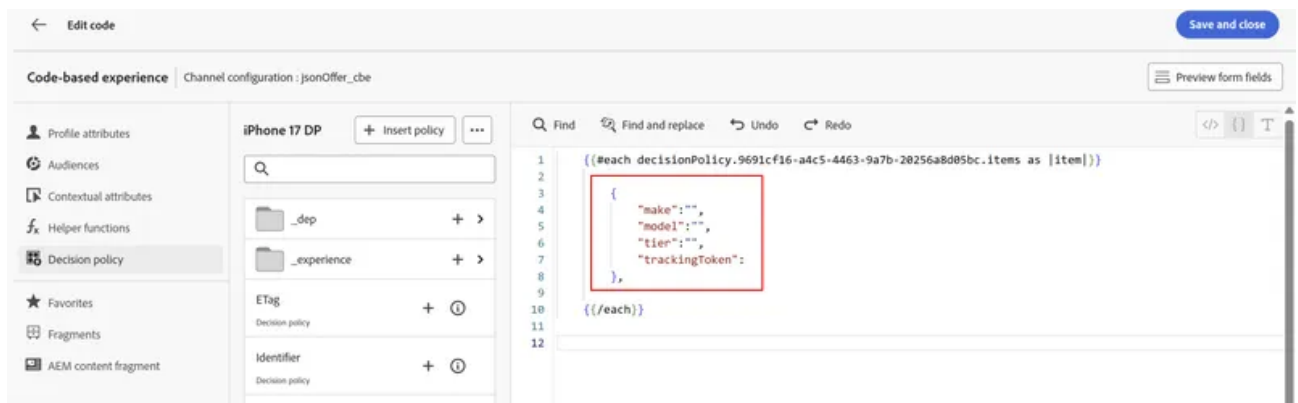


Insert decision policy

Why a for each loop? In our case, we're just returning a single offer. However, consider the previous steps where we could return multiple offers. When considering the functionality, the looping mechanism here makes sense.

14. We now need to add valid JSON within the bounds of the loop. We want to return the make, model, and tier of the phone that should be offered to the end user. Since we have frequency capping in place as well, we need to have a trackingToken added to the response. More on this later in the instructions. To save time, simply copy and paste these lines of code into the code editor within the For Each loop:

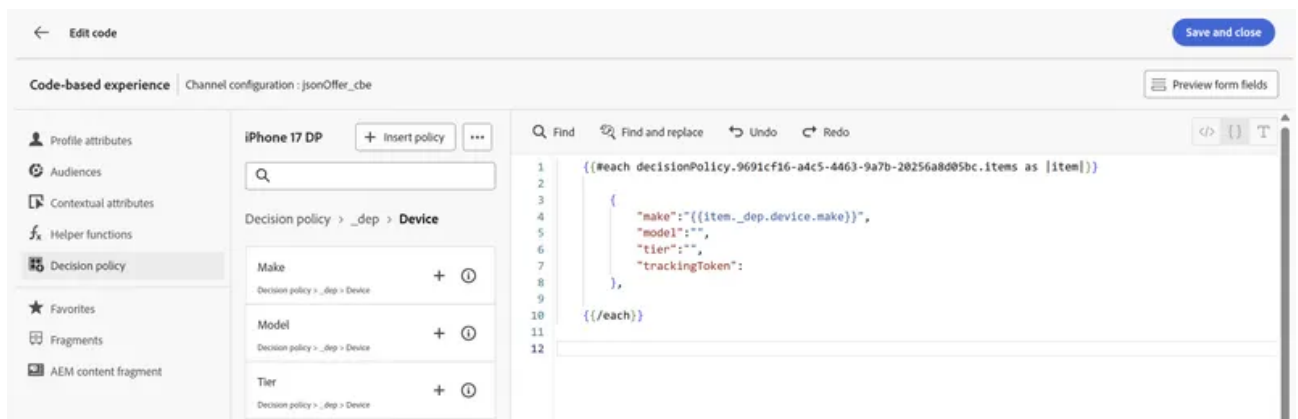
```
{
  "make": "",
  "model": "",
  "tier": "",
  "trackingToken": ""
},
```



Add initial JSON validation

Recall that you added attributes to the standard offer XDM schema, specifically, the make, model, and tier. You then populated those attributes when the offers were created. We will now add those attributes as variables that will be populated with values from the selected offer. The trackingToken field is a system-generated value used for tracking clicks and impressions.

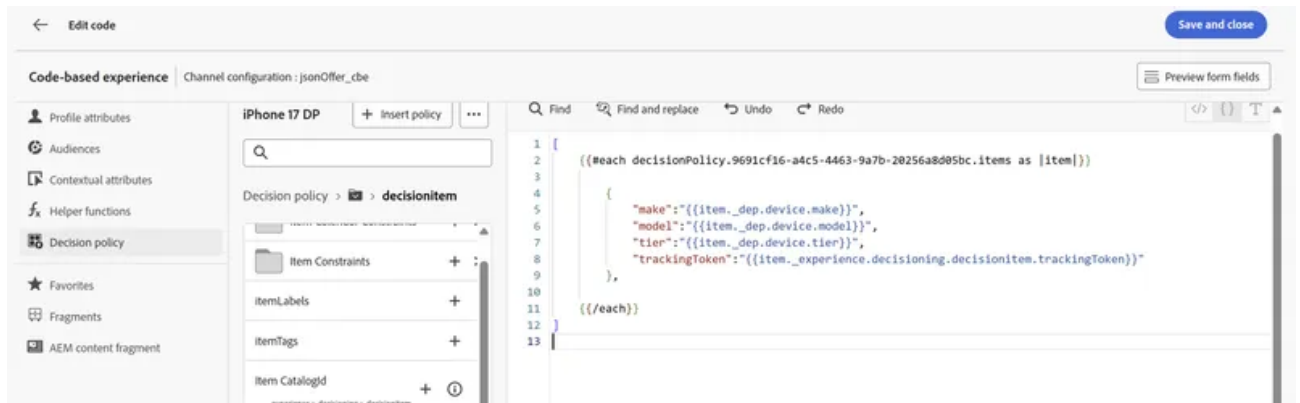
- Place the cursor between the "" of the 'make' node. Insert the make of the offer by navigating in the decision policy menu to the **_dep > Device > Make** node. Click the + icon on the **Make** element, and you'll see it populate the editor.



Add Make item

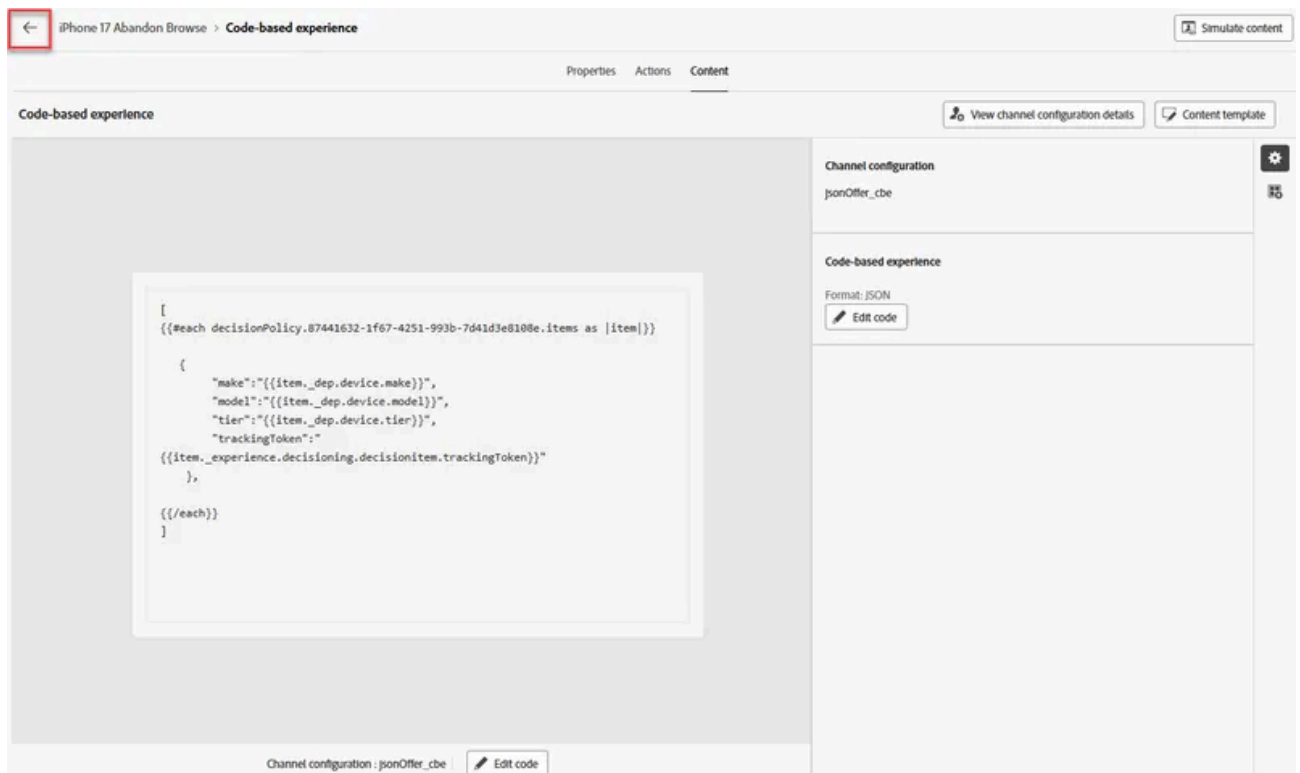
- Add the **model** and **tier** attributes in a similar manner.
- Click on **Decision policy** in the attribute navigation to return to the root level.
- Populate the trackingToken attribute by navigating to the Tracking Token value via **_experience > decisioning > decisionitem > Tracking Token** path.

19. Finally, encase the entire piece of code in a set of square bracket ([]). Your final JSON code should look like this:

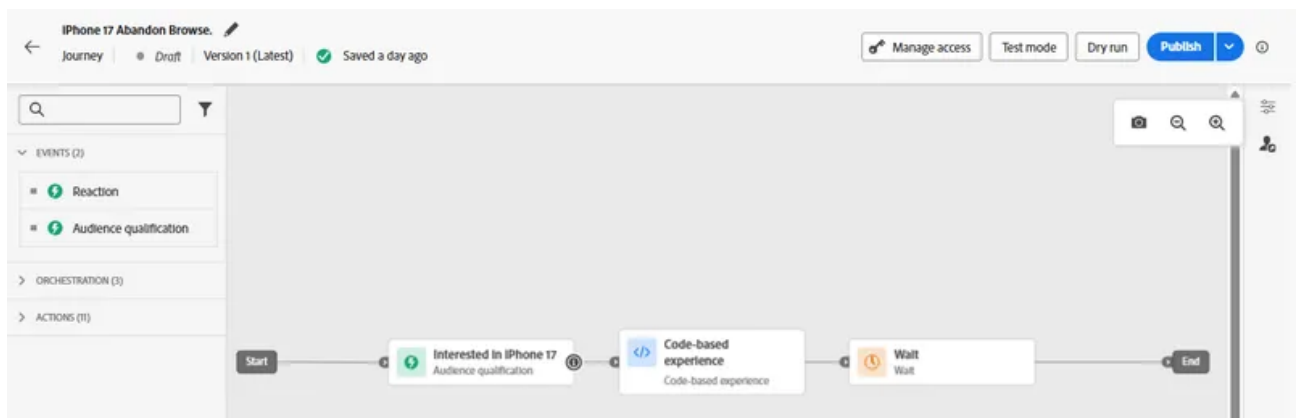


Validate final JSON for CBE

18. Once everything looks the screenshot above, click the **Save and close** in the upper right to save your code. You will then be returned to the Code-based Experience page.
19. Click the back arrow < icon next to the Journey name, and you'll be returned to the canvas.

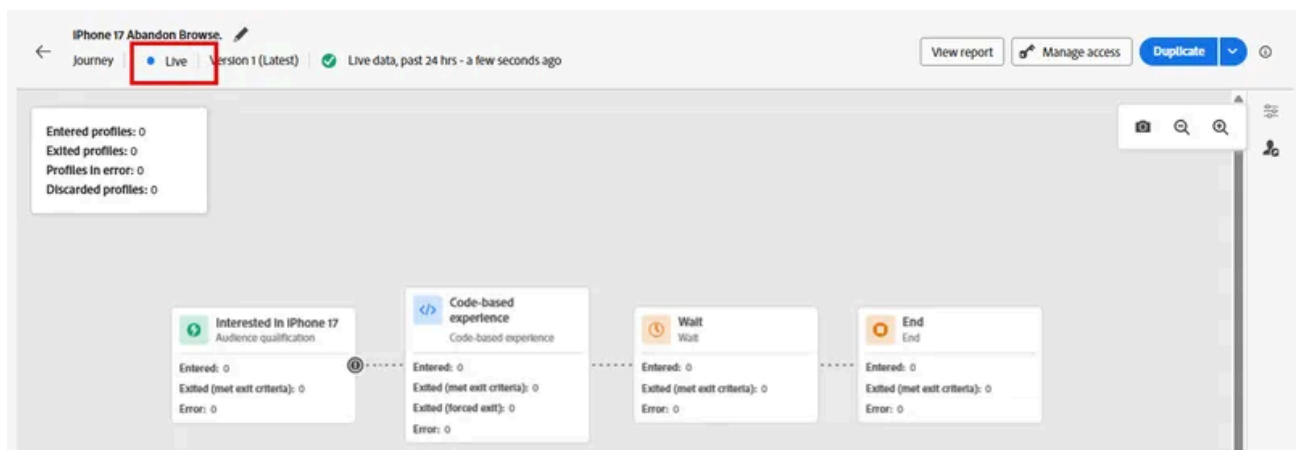


20. Click the blue **Save** button to save the CBE action node. Your Journey should now look like this:



Final Journey Validation

21. With the Journey completed, click the blue **Publish** button in the upper right and **Publish** again when the confirmation box appears.
22. After a moment or two, you'll see that your Journey is now live!



Journey is live validation

Your Journey is now ready to serve JSON offers for this Decisioning package!

Why was a wait node automatically created after the CBE was placed on the canvas? Remember that a CBE is an inbound channel. Unlike an email or push notification that is proactively sent to the end user, a CBE is pushed to the Edge, and there it waits for the end user to come to the digital property and request an offer. How long it waits there is defined by that wait node. By default, it is set for 3 days, but it is configurable. We'll leave it as 3 days for the sake of the lab, but in a real-world scenario, you'd likely want to extend it out for longer because when the wait time has elapsed, that user's Journey progresses to the end node, and the CBE is removed from the Edge profile store for that user.

This also highlights an important architecture and timing consideration. When does the CBE for that user get pushed to the Edge profile store? When the user progresses to that node, which means after they qualify for the segment. This means that it'll be anywhere from a few seconds to several minutes after the user views that 3rd page before the streaming segmentation executes, the user is placed in that segment, they enter the journey and progress to the CBE node, and then that CBE is projected to the Edge for that user. In a test org with very little data and processing demands, that whole process is just a few seconds or minutes. For a larger organization with much higher throughput, plan on at least 15 minutes with a potential of up to 2 hours.

Recap

On this page, you configured a Code-Based Experience (CBE) channel that enables external systems to request offer decisions via an API-style inbound channel. This setup included specifying the surface/location parameters that client systems will send, and choosing the JSON output format.

6.1.9. Decisioning and CBEs In Action

Objective

Now that the Journey is live, you can start sending in Experience Events and see offers returned. Since the birth year and phone plan IDs of individual profiles affect what offer is returned, we have to send in Experience Events for preconfigured profiles with specific birth years and plan IDs.

Profiles and Postman Setup

The three profiles that you'll use are already in your sandbox and are outlined in this table:

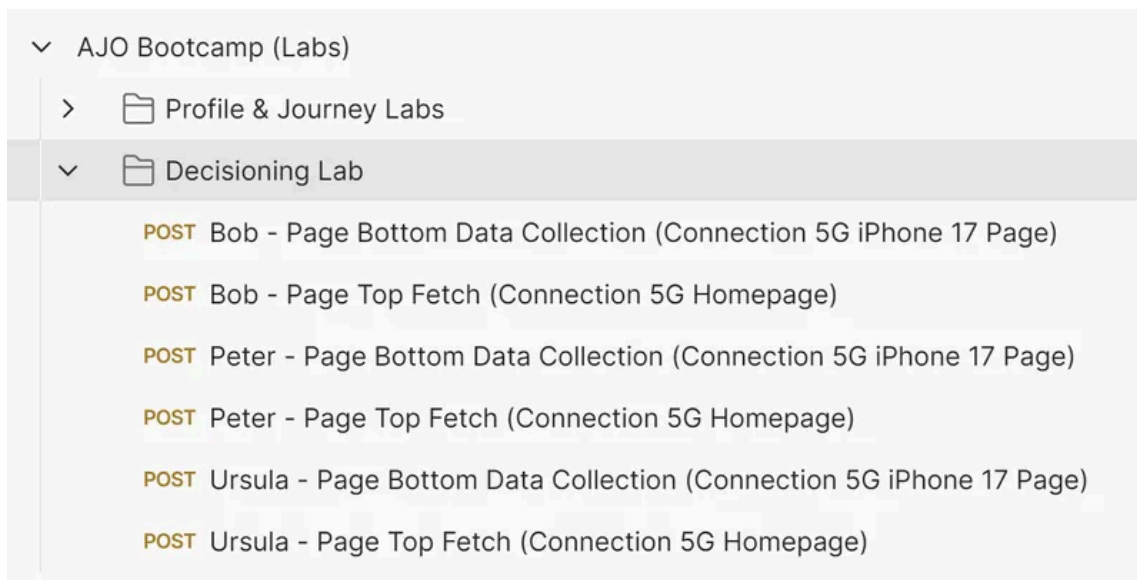
First Name	Last Name	Birth year	Plan ID	Custom erid	ECID	Email
Bob	Basic	1974	1	287415903	34566216966446312560595171785271630085	bob@dep.com
Peter	Professional	1981	2	105946728	22344522145769262754334953788432801285	peter@dep.com
Ursula	Ultimate	2002	3	730682145	35615467908312308343036144243711275069	ursula@dep.com

Locate these profiles in AEP

1. If necessary, expand the **Customer** item in the left rail and click on **Profiles**
2. Click on the **Browse** tab, and among all the profiles that were already created for you or that you created as part of previous labs, you should see these three profiles.

Find the corresponding Experience Events for each profile in the Postman collection

1. If necessary, open Postman
2. Ensure that the **EDGE_REGION** and **DATASTREAM_CONFIG** environment variables are still set. If they need to be set again, review the steps in the 'Import Environment and Collection' lab.
3. Expand the **Decisioning Lab** folder. You will see 2 Experience Events for each profile:



Postman calls

Sending in Experience Events

Do not skip the opening text explanation of this section!

Given unlimited time and resources, we'd have you build and deploy a Tags library with the AEP Web SDK on an actual website. This would demonstrate how to retrieve and report on offers. However, given the sheer breadth and depth of the content covered in these labs, we've chosen to pre-build the Experience Events needed to enter the Journey, retrieve offers, and report on those offers in a Postman collection, rather than requiring you to tag a website. When used correctly, this collection mimics how a properly tagged site (or any digital channel) would use the CBE delivery channel in a Journey.

The recommended approach for AEP Web SDK deployments is to use a two-call-per-page approach. In this pattern, the Web SDK sends a 'fetch' call at the top of the page to the Edge that requests any personalizations needed for the user. Those personalizations are returned by the Edge and then rendered by the Web SDK. A second call at the bottom of the page, typically referred to as the Data Collection call, is then sent to the Edge, and reports on what was shown to the end user, along with other data for Analytics, CJA, and other solutions. When it comes to retrieving propositions from the Edge, remember a simple mnemonic: FAR, which stands for Fetch, Apply, and Report. All propositions must be fetched, applied, or rendered (shown to the end user), and then reported on. It's critical that these offers are reported as being seen so that the frequency capping rules work.

Adobe Target activities and the AJO Web Channel can have their responses fetched and applied automatically by the AEP Web SDK. Their reporting can also be sent with the Data collection call at the bottom of the page. However, CBEs are different. The AEP Web SDK can fetch the propositions, but it is up to the customer to both apply (render) whatever is returned and then use the AEP Web SDK to report on what was shown. A CBE typically does not use the Data collection calls to report on what was shown, so they must be passed in manually.

In the Postman collection, you'll see that each profile has two Experience Event calls

1. A Page Top Fetch Experience Event
2. A Page Bottom Data Collection Experience Event

The page top Experience Event includes the 'jsonOfferContainer' parameter in the request, which is the 'Location on the Page' that you configured for the CBE. Additionally, this call uses Postman functionally to take the response from the Edge and then immediately send a second call to the Edge reporting that the offer was shown to the end user. There is no actual application or rendering of the offer because there is no Website for this lab. But from AJO's perspective, the offer was returned and then reported as seen.

The page bottom data collection call is purely for the sake of generating a pageview for the iPhone 17 Overview Page. Recall that the segment for getting into the Journey itself requires 3 views of this page. Once that Experience Event has been sent in 3 times, that user will enter the Journey, and then only the Page Top Fetch Experience Event will be needed to get the offer and report that it was seen.

Let's start with Bob's Profile.

1. Click on the **Bob - Page Bottom Data Collection** request.
2. Click on the **Body** tab and notice the parameters being passed, such as the customerID namespace in the IdentityMap, which would indicate that he's authenticated, as well as the 'web.webPageDetails.name' parameter that passes in the pagename of 'phones:apple:iphone 17:overview'.

POST https://edge.adobedc.net/ee/{{EDGE_REGION}}/v1/interact?configId={{DATASTREAM_CONFIG}}

Docs Params Authorization Headers (2) **Body** Scripts Settings

☐ none ☐ form-data ☐ x-www-form-urlencoded ☒ raw ☐ binary ☐ GraphQL **JSON**

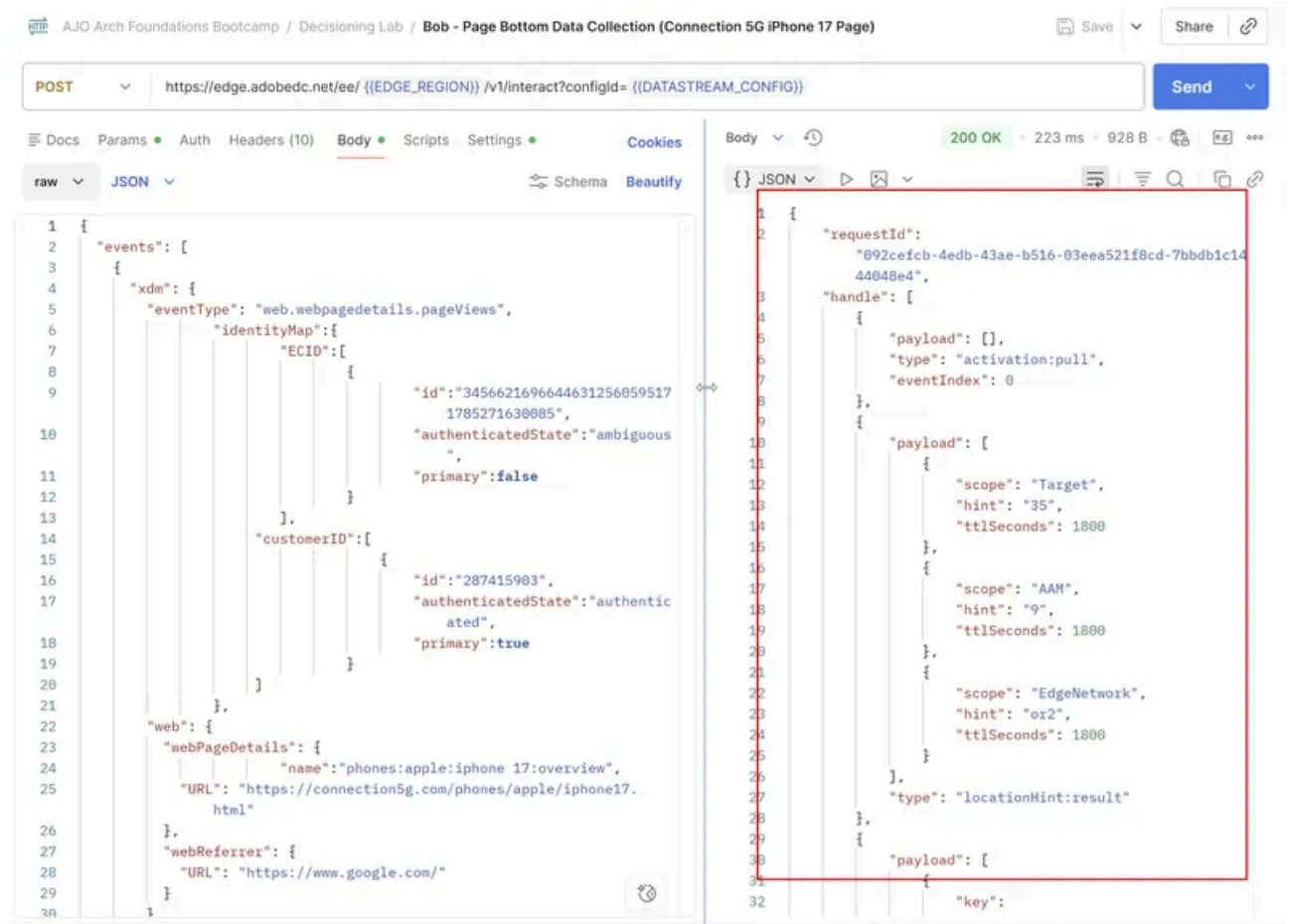
```

1  {
2    "events": [
3      {
4        "xdm": {
5          "eventType": "web.webpagedetails.pageViews",
6          "identityMap": {
7            "ECID": [
8              {
9                "id": "34566216966446312560595171785271630085",
10               "authenticatedState": "ambiguous",
11               "primary": false
12             },
13             ],
14             "customerID": [
15               {
16                 "id": "287415903",
17                 "authenticatedState": "authenticated",
18                 "primary": true
19               },
20             ]
21           },
22         "web": {
23           "webPageDetails": {
24             "name": "phones:apple:iphone 17:overview",
25             "URL": "https://connection5g.com/phones/apple/iphone17.html"
26           },
27           "webReferrer": {
28             "URL": "https://www.google.com/"
29           }
30         }
31       }
32     ]
33   }

```

Bob page bottom call

- Click **Send** in the upper right corner to send a page view. You should get a response back similar to this



Bob data collection response

- Once you've received a proper response, click **Send** again to resend the same Page bottom event a 2nd time. Wait a few seconds, then send in a 3rd Data Collection call for the Bob profile. You should have sent a total of 3, page-bottom calls.

At this point, the system should be processing those hits and adding Bob to the "dep: Interested in iPhone 17" streaming segment. Once that is done, Bob will be put into the Journey. Once in the Journey, it should only take a few minutes for Bob's entrance into the Journey and segment to be projected to the Edg Profile store for Bob.

- Return to the AJO UI and click on **Profiles** in the left rail, followed by the **Browse** tab.
- Search for Bob's profile by using the **customerID** namespace with the value of **287415903**.

Profiles

Overview **Browse** Merge Policies Union Schema Computed attributes

Browse profiles by merge policy and filter by an identity value (optional).

Merge policy ⓘ * X

Identity namespace ⓘ X

Identity value ⓘ ✓

[View](#) [Clear](#)

Search for Bob

- Click **View** to open Bob's profile (Bob's profile color may be different than is shown in the screenshot).

Profiles

Overview **Browse** Merge Policies Union Schema Computed attributes

Browse profiles by merge policy and filter by an identity value (optional).

Merge policy ⓘ * X

Identity namespace ⓘ X

Identity value ⓘ ✓

[View](#) [Clear](#)



Bob Basic

ProfileId: G4FGTQFBZINfniER

[View](#)

View Bob's profile

- Once Bob's profile opens, click on the **Audience membership** tab, and you should see that Bob is now a member of the 'dep: Interested in iPhone 17' segment, at least from AEP Hub's perspective.
- Click on **Attributes**, then select the **Edge** radio button to switch to the Edge view.

Profiles > Profile G4FGTQFBZINfnIER

Detail **Attributes** Accounts Opportunities Source records Events Audience membership

Profile using merge policy **Default Timebased** Last modified time: 12/14/2025, 12:21 AM

Search:

Hub **Edge**

ATTRIBUTE	DISPLAY NAME	VALUE	↑ PATH
planID	Plan ID	1	_dep.plan.planID
id	id	287415903	identityMap.customerid.0.id
id	id	34566216966446312560595171785271630085	identityMap.ecid.0.id
birthYear	Birth year	1974	person.birthYear

Switch to Edge View

There is an unfortunate UI bug that requires you to click the attributes tab to switch the radio button to Edge.

- Click again on **Audience membership**, and if you did those steps quickly enough, you should see that the Edge is selected and shows that Bob has no Audience membership

Search Experience Cloud (Ctrl+/)

Developer Enablement Dev Viddy Lab Develop

Profiles > Profile G4FGTQFBZINfnIER

Detail Attributes Accounts Opportunities Source records Events **Audience membership**

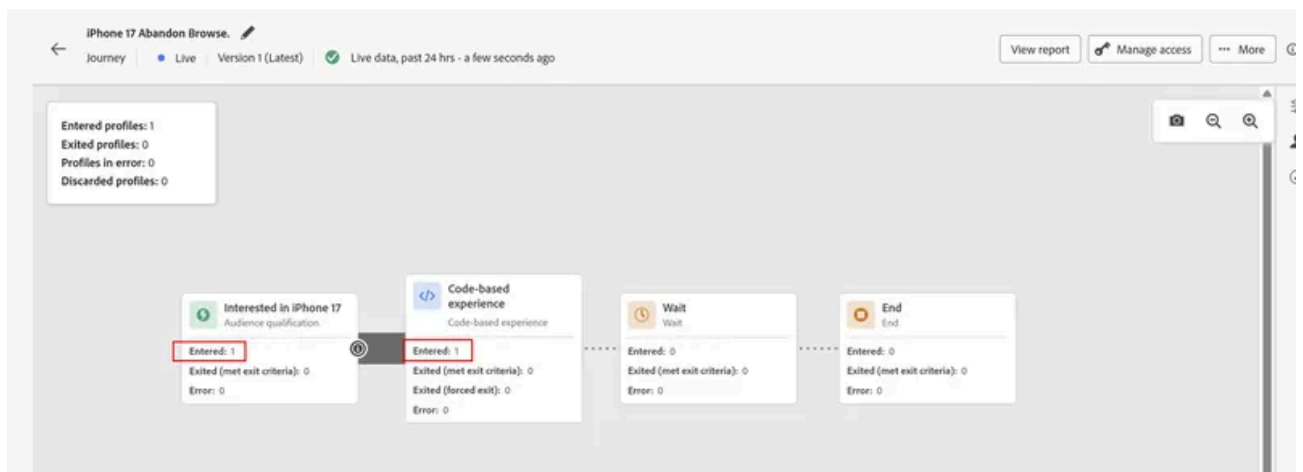
Search:

Hub **Edge**

AUDIENCE NAME	DESCRIPTION	MERGE POLICY	ORIGIN	AUDIENCE ID	LAST MODIFIED
 No audiences found					

No edge audience membership

- In a new browser tab, navigate to the Journey you created and click into it. You should see that one profile has entered the Journey and is now on the CBE node.



See Bob enter the journey

At this point, we know that Bob has entered the Journey and that the Edge projection is currently assembling a projection that will update Bob's profile on the Edge.

12. Switch back to Postman and click on the second of Bob's Experience Event calls, **Bob - Page Top Fetch**.

13. Click **Send**. What should happen?

- If Bob's Edge Profile hasn't been updated yet, then you'll get a very similar response to what you got from the Data Collection call. If this is the case, wait another minute or two and then try sending in Bob's Page Top Fetch call again.
- If Bob's Edge profile was updated, then you'll get a response with the JSON that was configured earlier, along with additional information used for reporting. But before moving on, what iPhone 17 offer should Bob be offered?

Bob was born in 1974, which is greater than 1966, so he would have qualified for the 2nd ranking formula criterion, and his Generic, Base, and Pro offer priority scores would have been multiplied by 100, giving those offers scores of 100, 200, and 300, respectively. However, Bob Basic has a plan ID 1, so he's not eligible for the Ultra or Pro tier offers thanks to the Decision rule. Therefore, the Base tier offer, which has a score of 200, would be shown. You can see that in the response (you will likely have to scroll down):

```

20      biI6IlJDNEJuNnc1NF1xd3orZVYzVVl4R2cifV19XQ=="
21    },
22    "rank": 1,
23    "activity": {
24      "id":
25        "f514e5dd-b71a-4eaa-b554-7595cb10d61b_5a0574b8-544d-4a3f-9233-400
26        9fde3fd17#9bccccfac-27ce-4c05-a3f9-25561f7c6203",
27      "priority": 0,
28      "matchedSurfaces": [
29        "web://connection5g.com/home#jsonOfferContainer"
30      ]
31    },
32    "items": [
33      {
34        "id": "cd2136f2-8464-49d1-ab17-b97b9f0cb502",
35        "schema": "https://ns.adobe.com/personalization/json-content-item",
36        "data": {
37          "content": [
38            {
39              "make": "iPhone",
40              "model": "17",
41              "tier": "Base",
42              "trackingToken": "RC4Bn6w54Yqwz+eV3UYxGg"
43            }
44          ]
45        }
46      }
47    ]
48  }
49 }

```

Bob's first response

14. Remember that this Postman request automatically sends a display notification for this offer, so AJO has already recorded at least one impression for this offer. Click **Send** again to send a second impression. Verify that the base offer was again returned.
15. Recall that we put a frequency cap of 3 impressions on the Base, Pro, and Ultra tier models. Click **Send** a 3rd time to get a 3rd response with the Base tier and to record another impression.
16. Click **Send** a fourth time, and what should happen? The frequency capping for the Base tier offer should be reached, and you'll receive the Generic offer in the response:

```

20         b2tlbiI6ImV3YTMrSytDSmNra0JMYzNnVHlk0EifV19XQ=="
21     },
22     "rank": 1,
23     "activity": {
24         "id":
25             "f514e5dd-b71a-4eaa-b554-7595cb10d61b_5a0574b8-544d-4a3f-9233-400
26             9fde3fd17#9bcccfac-27ce-4c05-a3f9-25561f7c6203",
27         "priority": 0,
28         "matchedSurfaces": [
29             "web://connection5g.com/home#jsonOfferContainer"
30         ]
31     },
32     "items": [
33         {
34             "id": "f47f4efd-22eb-420a-988e-a570c8372b88",
35             "schema": "https://ns.adobe.com/personalization/json-content-item",
36             "data": {
37                 "content": [
38                     {
39                         "make": "iPhone",
40                         "model": "17",
41                         "tier": "Generic",
42                         "trackingToken": "ewa3+K+CJckkBLc3gTydsA"
43                     }
44                 ]
45             }
46         }
47     ],
48     "type": "personalization:decisions",
49     "eventIndex": 0
50 },

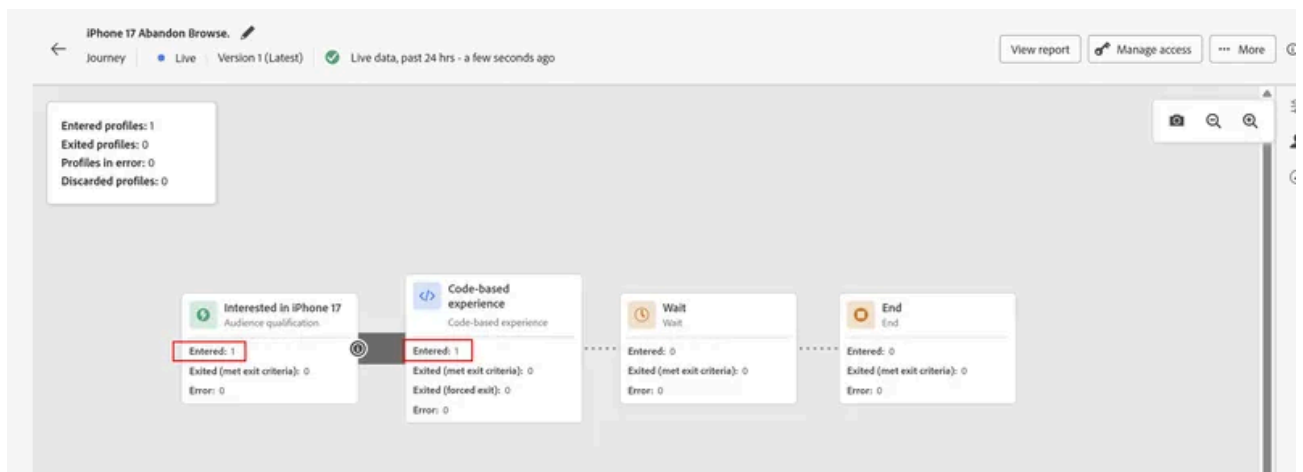
```

Bob's new offer

17. Click **Send** again, and you'll see the Generic tier offer. You could click Send 100 more times, and you'll get the same offer back until the next day when the frequency capping is reset.

Remember that in AJO, the day resets at Midnight GMT. If you were to send in another Fetch call after Midnight GMT, you'd see the Base tier offer return instead.

18. Return to the Journey Orchestration UI and click into the **iPhone 17 Abandon Browse** Journey you created. Because the Journey is live and published, you'll start seeing stats. You should see that 1 profile has entered the Journey and is currently at the CBE node.



Journey reporting is updated

At this point, you may be asking why the profile isn't at the wait node? Once it hit the CBE node and projected the updates to Bob's Edge profile, should he be at the wait node? The short answer is 'yes', it could be, but one might also make the argument that since the CBE is being actively returned, then that's where Bob is on this Journey. But after 3 days, the Journey will show that the profile has completed the Journey without ever really being in the wait node.

Send in Experience Events for Other Profiles

Now that you've seen the Journey working for Bob's profile, there are two other profiles to test.

1. Return to Postman and locate the Experience events for Peter and Ursula.
2. Execute the "Page Bottom Data Collection" event 3 times for each profile, remembering to give 1-3 seconds between each Send/Data collection request.
3. Wait a couple of minutes for the three profiles qualify for the Streaming segment, enter the Journey, and then have the CBE projected to their Edge Profiles.
4. Send in the Page Top Fetch call as many times as needed to verify that the Decisioning rules and Ranking formulas are working as expected.

Decisioning Profiles: Expected behavior

First Name	Last Name	1st Offer	2nd Offer	3rd Offer	4th Offer
Bob	Basic	Base	Generic	Generic	Generic
Peter	Professional	Pro	Base	Generic	Generic
Ursula	Ultimate	Ultra	Pro	Base	Generic

5. Once finished, return to the Journey. You should see that all 3 profiles have entered the Journey and are at the CBE node.

If you were to wait 3 days and re-send the Top of Page Fetch, you'd find that no offer was returned and that all three profiles had finished the Journey

Recap

On this final page of the lab, you moved into the execution phase, where you tested your decision setup using experience events and a Code-Based Experience (CBE) channel. You used Postman to send simulated experience events to Adobe Journey Optimizer so that:

- Profiles entered the journey you created because they met the streaming segment criteria.
- The CBE channel was invoked with fetch events to get offer decisions based on profile data (birth year, phone plan, etc.).
- Offers were returned and counted against frequency caps as configured, showing how different rules and ranking logic affected which offer was delivered.
- You verified that frequency capping and eligibility worked as expected by repeatedly sending offer fetch calls.

You have executed real decisioning calls and validated that your eligibility rules, ranking formula, and offer setup behave correctly when profiles interact with the decisioning engine.

6.1.10. Summary

Congratulations, you have completed the lab! You have now built and tested a complete **Adobe Journey Optimizer Decisioning workflow**.

You began by extending the **offer schema** and creating **eligibility rules** to control which customers qualify for specific offers. You then created multiple **offer items**, configured priorities and frequency caps, and organized them into an **offer collection**.

Next, you built a **ranking formula** and **selection strategy** to determine how eligible offers are evaluated and prioritized during decisioning. You also configured a **Code-Based Experience (CBE) channel** to allow external systems to request and receive offer decisions.

Finally, you **tested the end-to-end decisioning flow**, validating that Adobe Journey Optimizer correctly evaluates profile data, applies your decision logic, and returns the appropriate offer.

IF YOU ARE READING THIS, IT MEANS YOU ARE AT THE END OF THE LAB.

DO NOT PROCEED, DO NOT PASS GO, DO NOT COLLECT \$200

7. Content Authoring with AI

7.1. Overview

Pre-Requisites

The below labs must have been completed before starting this lab

- **Data Stores -- Relational Store in Action** → [Profile Target Dimension](#)
- **Data Stores -- Configure Email Channels** → [Configure for Relational](#)

If you have not completed these labs please do so now before continuing.

Learning Objectives

By the end of this module, you will be able to:

1. Explain the importance of content creation in Adobe Journey Optimizer.
2. Identify and describe key concepts, including Brands, Brand Guidelines, Journeys, and Templates.
3. Navigate the AJO interface to locate content creation tools relevant for email and journey execution.

Why content creation matters in AJO

Content is at the centre of every customer interaction. In Adobe Journey Optimizer, creating high-quality, brand-aligned content enables:

- A consistent customer experience across all channels
- Faster campaign execution using reusable templates and fragments
- Compliance with brand standards and legal requirements
- Personalisation at scale to drive engagement and results

Key concepts

This lab introduces the core elements required to create and manage branded content for Connection 5G.

1. Brands

A Brand in AJO represents a unique identity (e.g., Connection 5G). Each brand includes:

- Visual identity
- Writing style
- Tone and voice rules
- Assets and creative materials

2. Brand Guidelines

Brand Guidelines define:

- Writing style and tone
- Voice rules
- Legal requirements
- Visual standards such as colour, imagery, and iconography

3. Journeys

Journeys are automated workflows that orchestrate customer experiences based on:

- Profile attributes
- Events or triggers

- Eligibility and conditions

4. Templates

Templates are reusable structures for channels, for example:

- Email
- SMS
- Push notifications
- In-app messages

Navigation & interface walkthrough

Log in and Access the Dashboard

1. Open Adobe Journey Optimizer in your browser.
2. Sign in with your credentials.
3. You will land on the main dashboard.

Locate the Main Navigation Menu

Explore:

- Brands
- Content (Emails, Templates, Messages)
- Fragments
- Journeys
- Assets

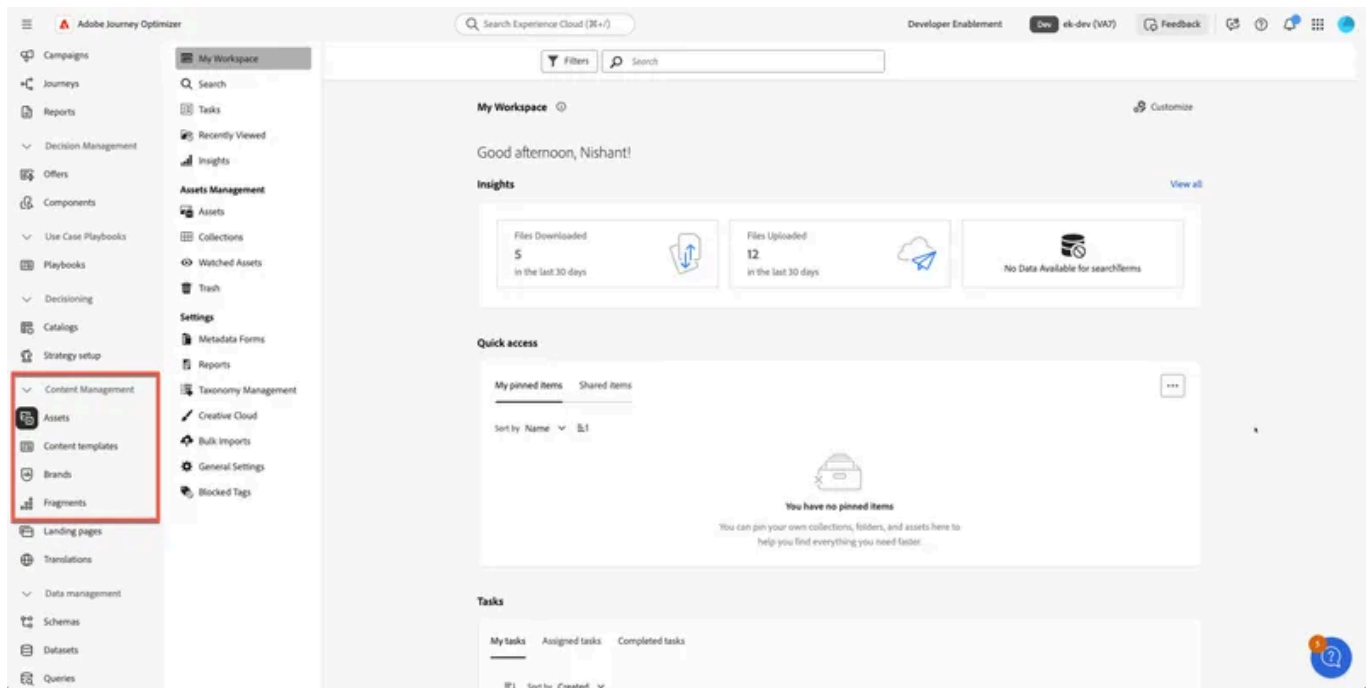
Access content creation tools

Before you begin building your brand, let's take a moment to explore the **content creation tools** available in Adobe Journey Optimizer including:

- Assets
- Content Templates

- Fragments

Click on each of them and get familiar with the UI. We will go through each section in this lab.



Summary

You have now learned:

- The importance of content creation in AJO
- Definitions of Brands, Brand Guidelines, Journeys, and Templates
- How to navigate the AJO interface and locate key content creation tools

You are ready to continue to next module - Brand Management.

7.2. Brand Management

Purpose: Configure, refine, and publish the Connection 5G Brand Guidelines inside Adobe Journey Optimizer (AJO), so that all content and AI features stay aligned to the brand.

Learning Objectives

By the end of this module, you will be able to:

- Create a new brand in Adobe Journey Optimizer.
- Upload and extract brand guideline information from a PDF.
- Review and refine brand details across About the Brand, Writing Style, and Visual Content tabs.
- Add an exclusion rule to avoid pushy email button copy.
- Publish the brand so it is available to templates, fragments, AI Assistant, and Brand Alignment.

 [toolkit.zip](#)



Note:

Before starting the hands-on labs, make sure to download the toolkit file (see below toolkit.zip). Unzip the file to access the images and supporting files required for the exercises. Keep these assets somewhere easy to access, as you will reference them throughout the lab.

Introduction

In this module, you will build the **Connection 5G** brand inside AJO using a prepared brand guideline PDF.

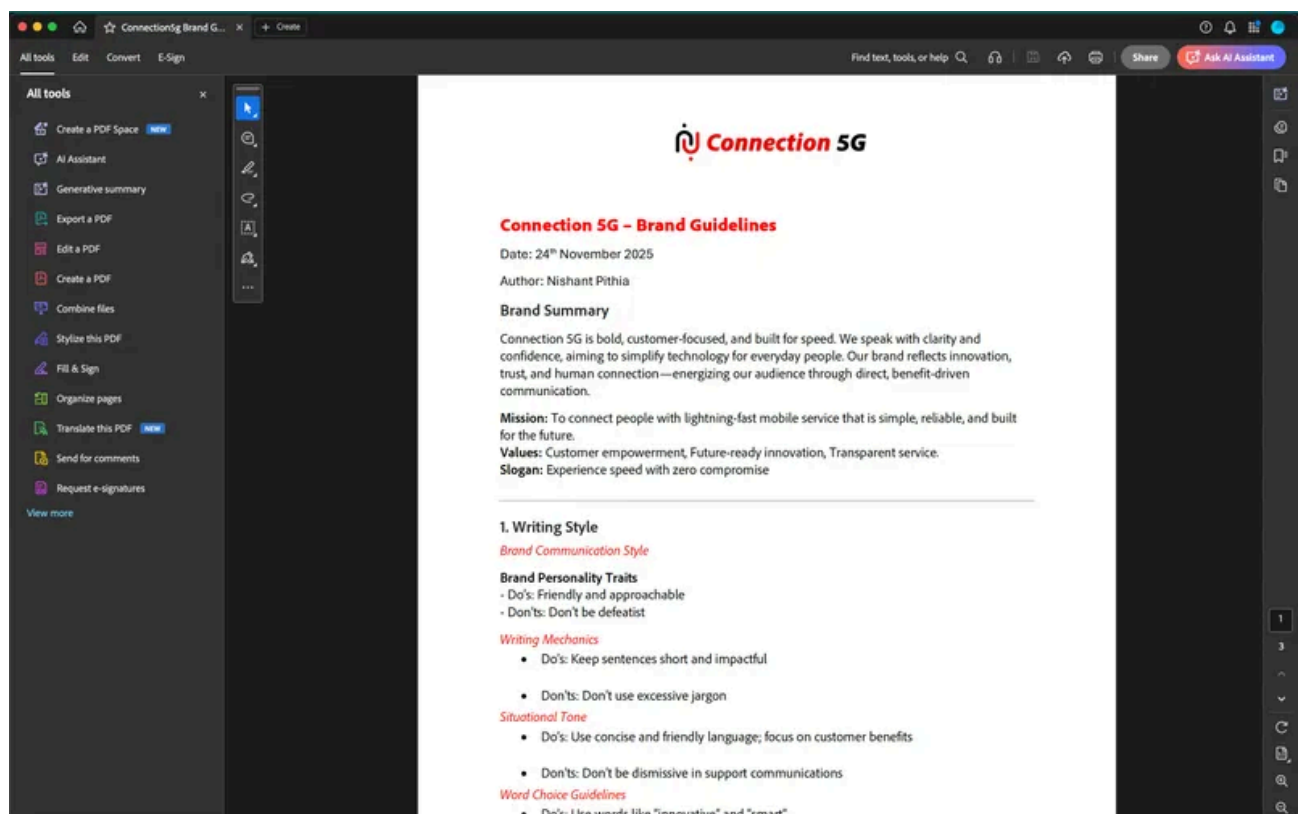
Adobe Journey Optimizer's **Brands** feature helps you define and maintain a consistent identity across all marketing efforts. From logos and colours to tone of voice and messaging style, creating a brand ensures that every email, campaign, and content piece reflects a unified personality.

We will be using pattern 1 from the lecture (AJO only) for this lab. Note that the asset stored us using **Assets Essentials**.

You will start with the Connection 5G Brand Guideline document, upload it, let AJO extract key information, then refine and publish the result.

Prepare the Brand Guideline

1. Open the **Connection 5G Brand Guideline** PDF from the toolkit folder (make sure you unzip it first).

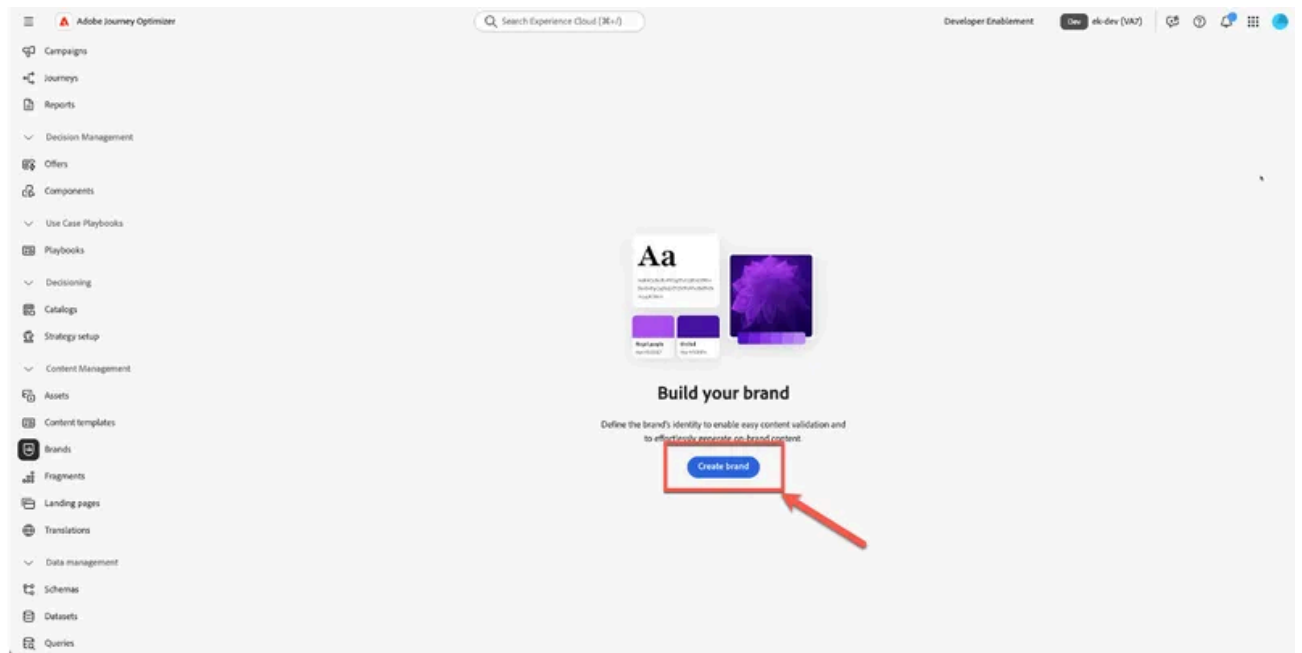


2. Review the document to understand content used for Connection 5G:
 - Tone of voice
 - Colours and visual style
 - Writing style and messaging examples

- Imagery guidance
- Legal and compliance notes

Create a New Brand in AJO

1. In Adobe Journey Optimizer, go to the left navigation and click **Brands**.
2. Click **Create Brand**.



3. In the **Name** field, enter `Connection 5G Brand Guidelines`
4. In the upload area, drag and drop the **Connection5g Brand Guidelines.pdf** file (or click **Select files** and choose it from your computer).

Create brand

Input the brand's name and upload brand guideline documents to extract relevant brand information.

Name *

Connection 5G Brand Guidelines

Upload documents that contain key brand elements



Drag and drop your files

[Select files](#) of PDF format, upto 100 MB

Uploaded documents



Connection5g Brand Guidelines.pdf

application/pdf - 233.34 KB



AI generated responses may be inaccurate. Please evaluate outputs for accuracy and appropriateness to your use case. See the [Adobe GenAI User Guidelines](#).

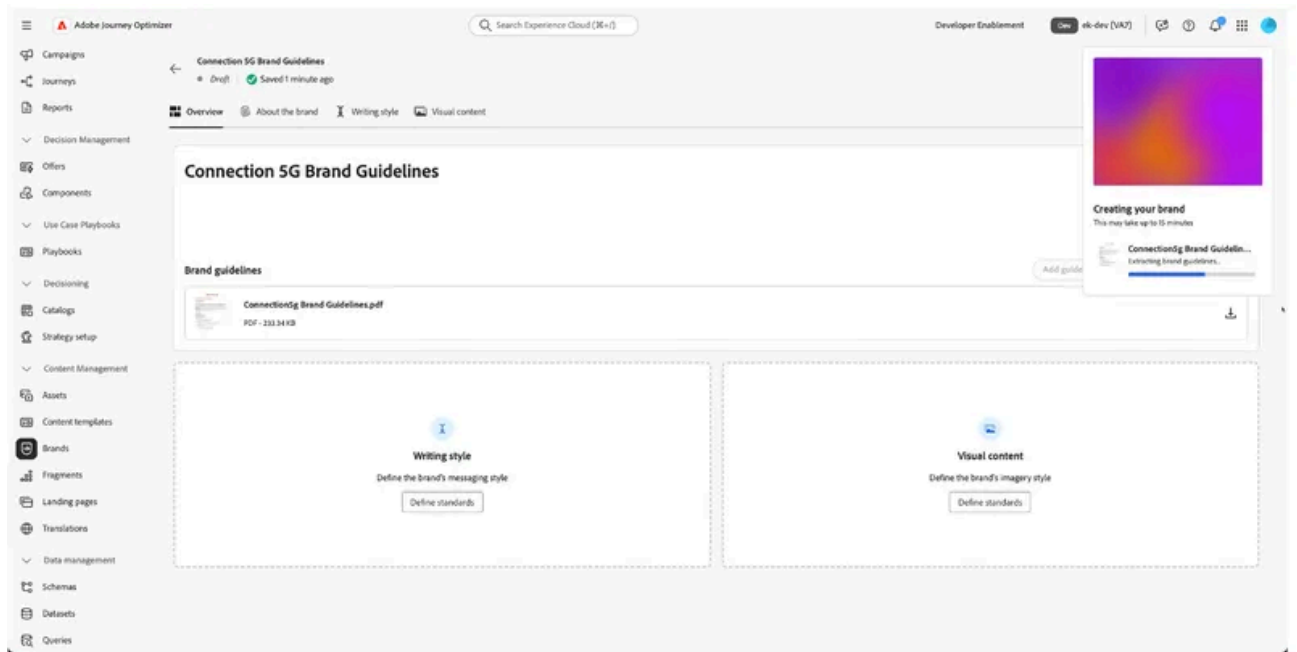
Cancel



Create

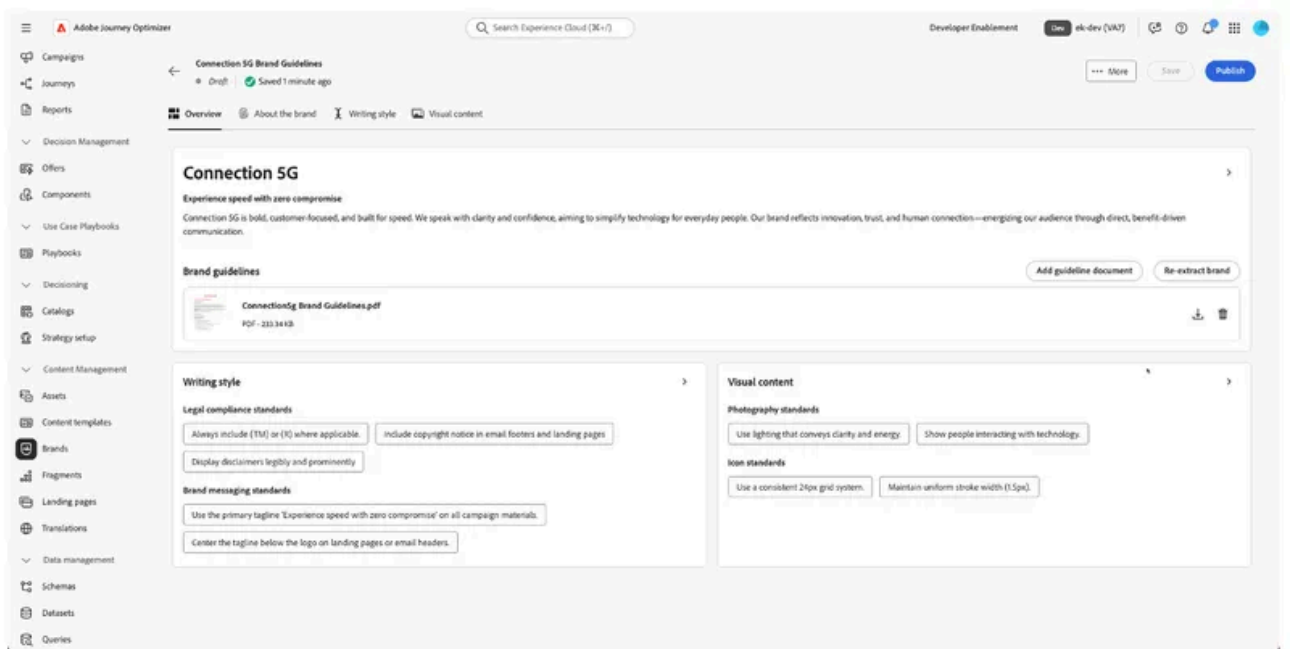
5. Click **Create brand** to begin the extraction.

A progress screen will appear while AJO analyses your file. This may take several minutes depending on the size of the document.

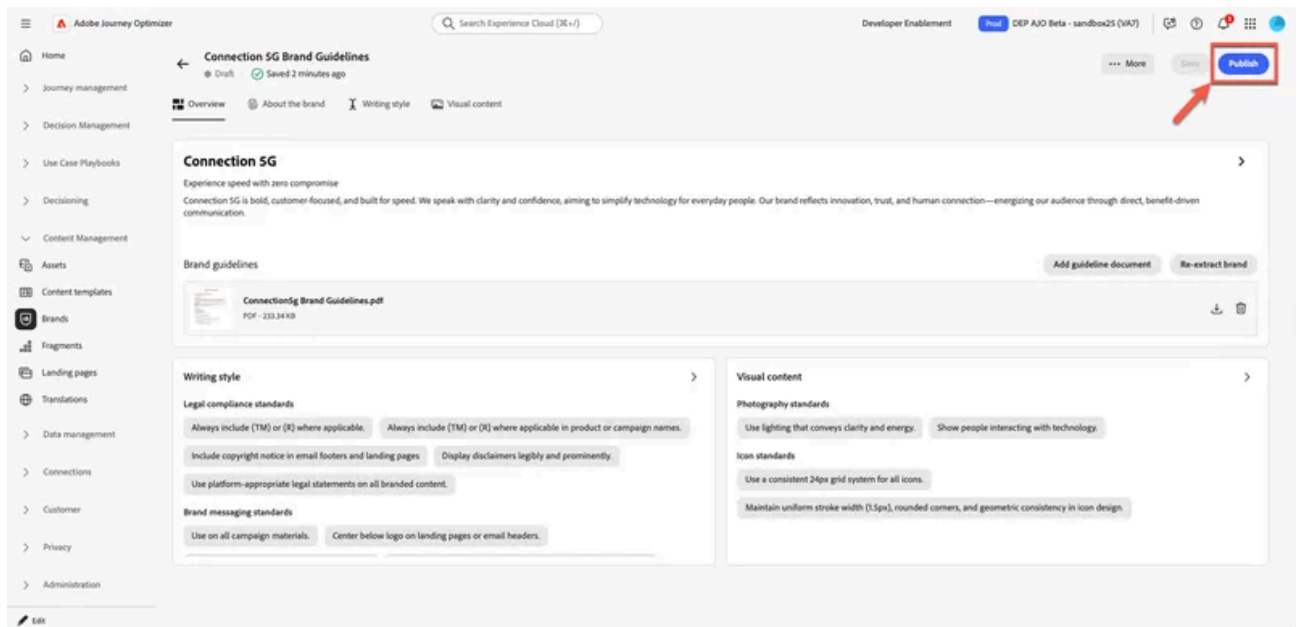


6. Once extraction is complete:

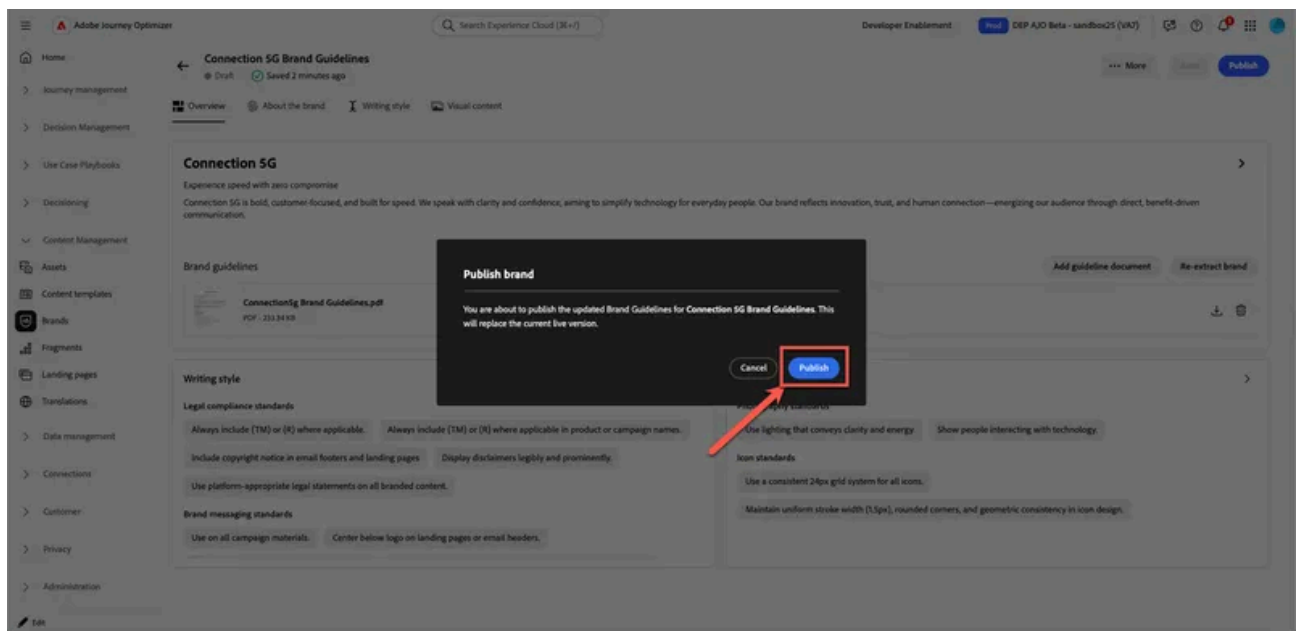
- A green confirmation bar appears at the top.
- You are automatically redirected to the brand configuration screen.
- Content and visual creation standards are now automatically populated based on the Brand Guidelines file uploaded.



7. Click on **Publish** button to publish the brand guidelines.

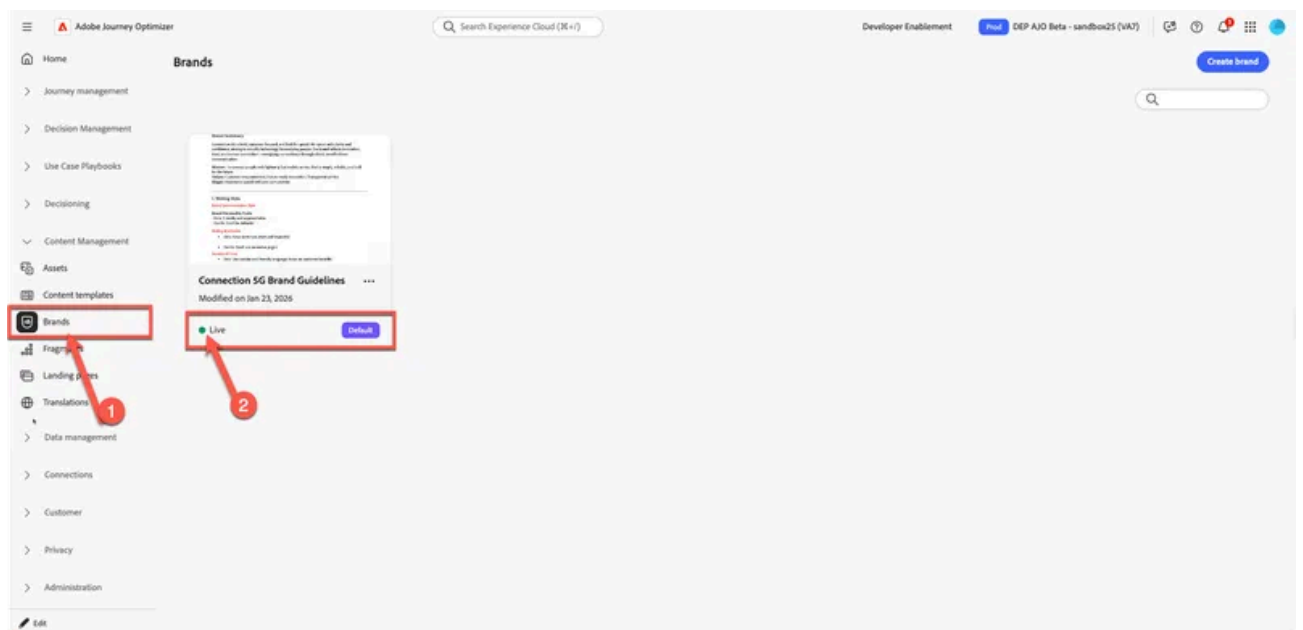


8. Confirm by pressing "Publish" button to confirm.



A green confirmation bar appears at the bottom of the page indicating that your brand is successfully published.

8. Click back on the main brand page and you will see your brand is now live (This should be shown by green dot with a label "**Live**")



Review the brand tabs

You will now review and understand the three key tabs that have been populated for Connection 5G.

About the Brand

This tab defines the brand's identity at a high level. It typically includes:

- Brand name
- Core values
- Guiding principles
- Brand purpose and promises
- The feeling the brand wants to create

Everything else in the system builds from this foundation, so it is important that this tab reflects the true DNA of Connection 5G.

The screenshot shows a web interface for brand management. At the top, there are four tabs: 'Overview', 'About the brand' (which is selected), 'Writing style', and 'Visual content'. Below the tabs, there's a header section for 'About the brand' with a sub-header 'Define essential details that shape the brand, such as its philosophy, tagline, and more.' On the left side, there's a sidebar with three items: 'Key details' (selected), 'Guiding principles', and 'Brand guidelines documents'. The main content area is titled 'Key details' and includes a 'View source' link. It contains several input fields: 'Brand kit name' (with a required field asterisk and a help icon) containing 'Connection 5G Brand Guidelines' with a green checkmark; 'When to use' (an empty text area); 'Brand name' containing 'Connection 5G'; 'Description of this brand' containing a paragraph about Connection 5G's bold, customer-focused nature; and 'Tagline (Default)' containing 'Experience speed with zero compromise'.

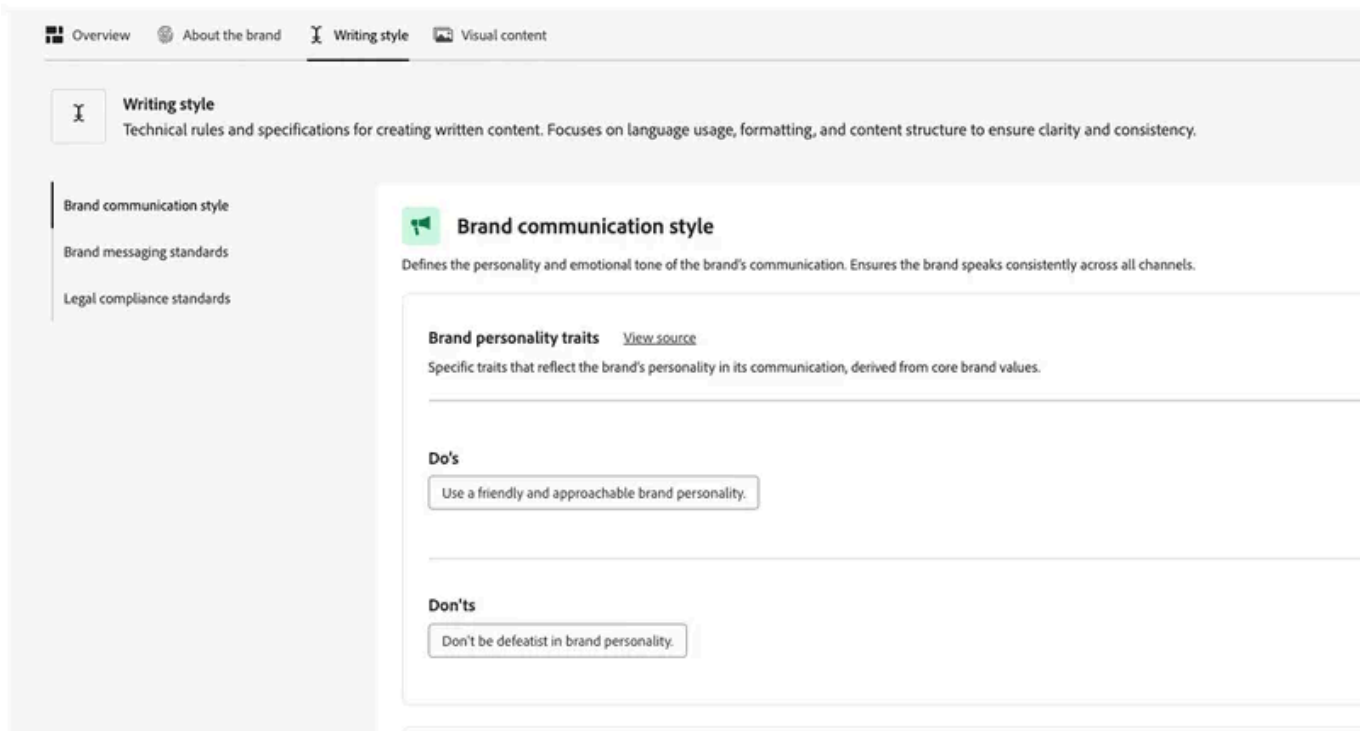
Spend a moment browsing the extracted fields and checking that they match the original PDF.

Writing Style

The **Writing Style** tab defines how the brand communicates. It includes:

- Tone guidelines

- Dos and Don'ts
- Example phrases and key messages
- Taglines and slogans
- Legal rules such as when to include trademarks

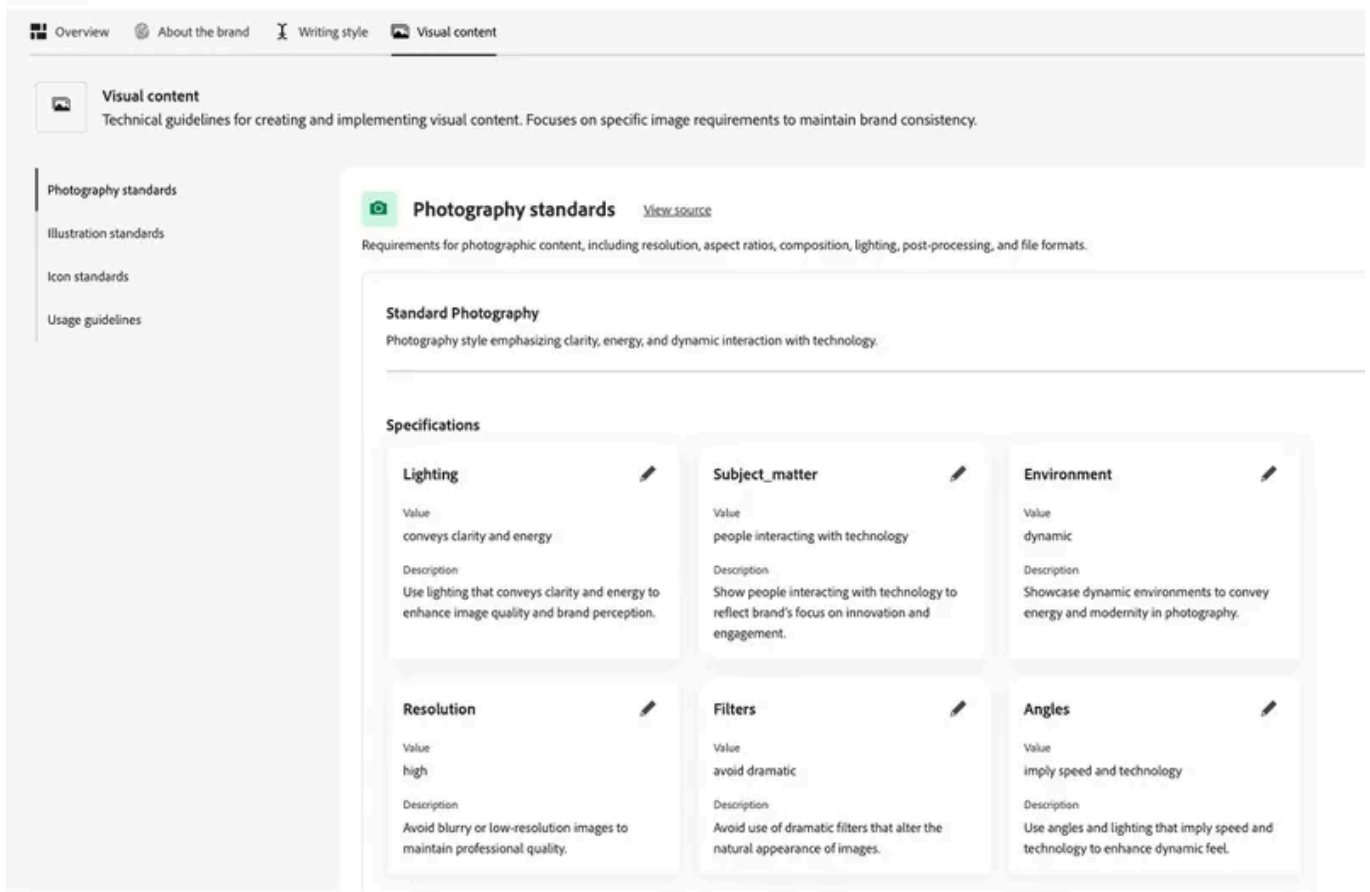


You can add and refine rules in natural language and even apply them only to specific channels, such as email or SMS. This gives you flexible but precise control over how AI Assistant and content authors should write.

Visual Content

The **Visual Content** tab outlines how the brand should look. It covers:

- Photography standards
- Illustration style
- Iconography rules
- Visual Dos and Don'ts

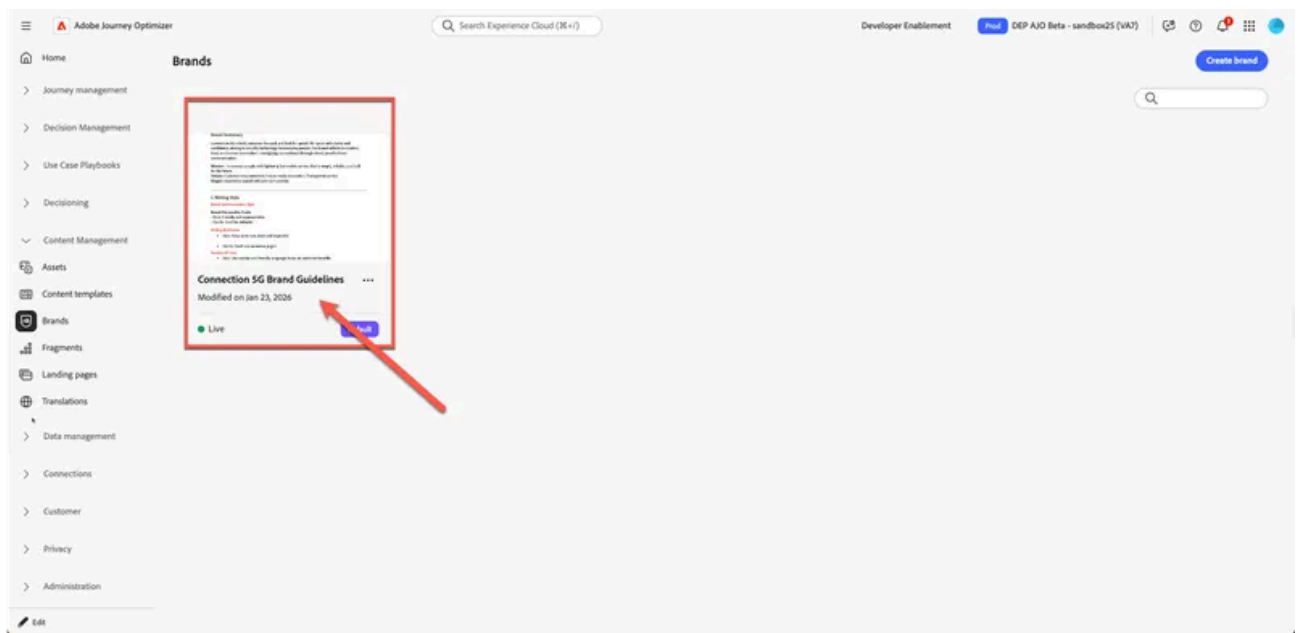


This ensures everything from images to icons feels consistent and aligned with Connection 5G's core values.

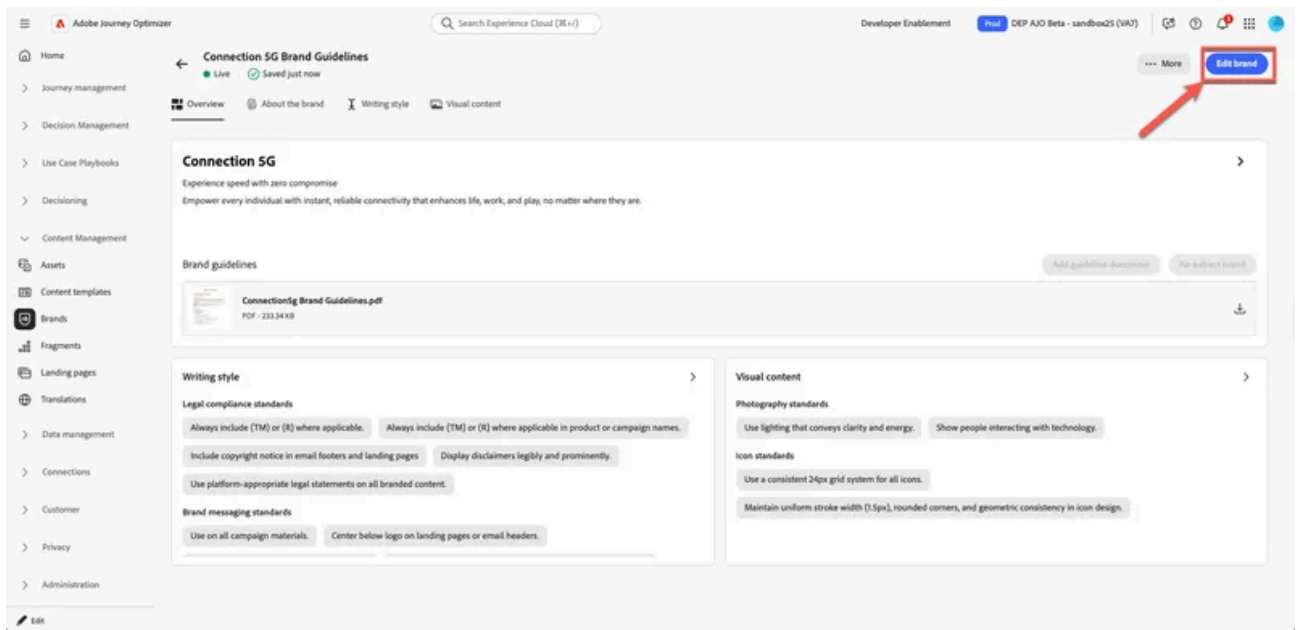
Add Missing Vision and Market Positioning

In the extracted content, some guiding principles may be incomplete. You will now complete them using the official wording from the PDF.

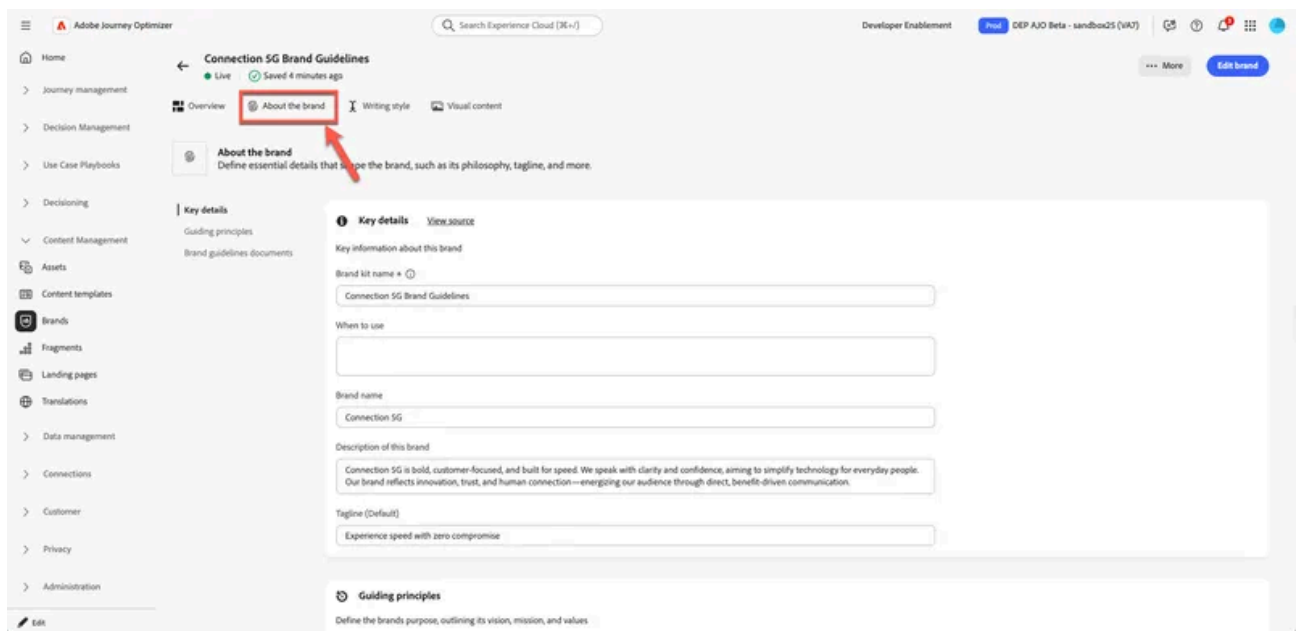
1. Click on the brand you just created



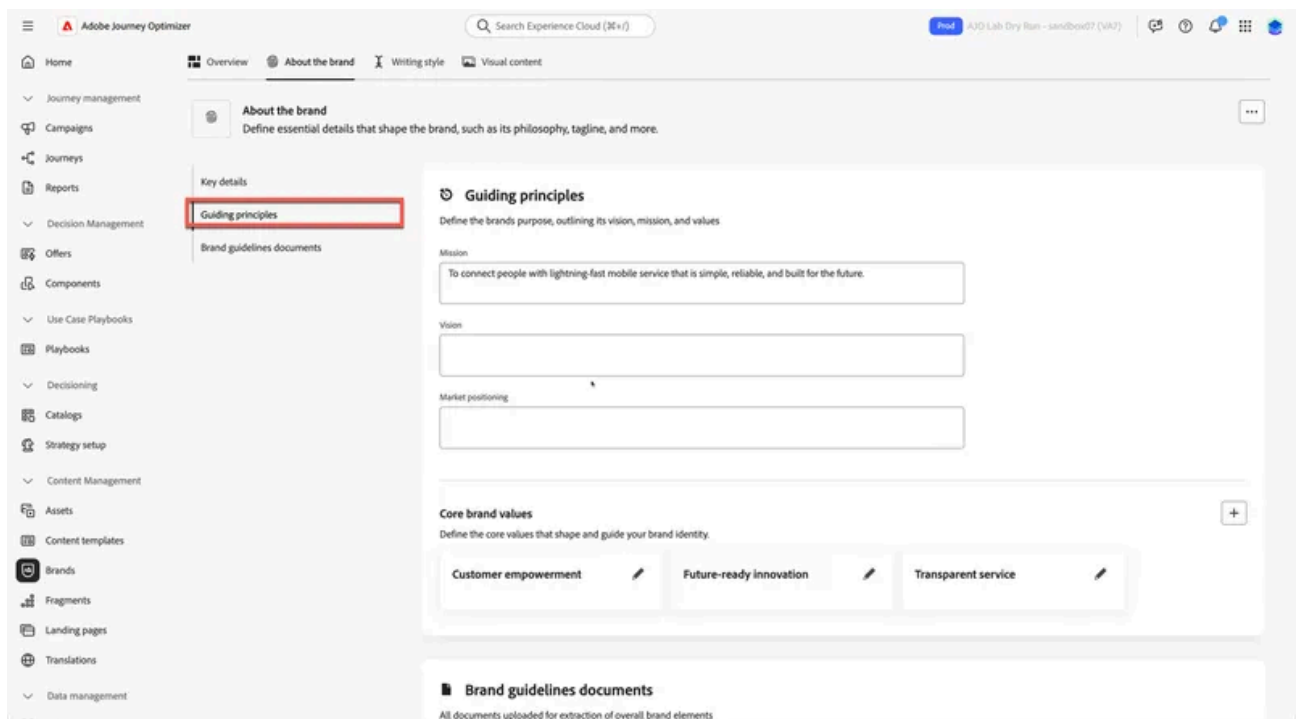
2. Click on Edit Brand. You will get another tab to confirm Edit brand. Click on Edit brand button again.



3. Go to the **About the Brand** tab.



3. Locate the section for **Guiding principles, Vision**, or similar high-level description.



3. Add the following text:

Vision:

Empower every individual with instant, reliable connectivity that enhances life, work, and play, no matter where they are.

Market positioning:

Connection 5G delivers premium-speed mobile service designed for digital lifestyles, standing out with unmatched reliability, simplicity, and future-ready innovation.

Guiding principles

Define the brand's purpose, outlining its vision, mission, and values

Mission

To connect people with lightning-fast mobile service that is simple, reliable, and built for the future.

Vision

Empower every individual with instant, reliable connectivity that enhances life, work, and play, no matter where they are.

Market positioning

Connection 5G delivers premium-speed mobile service designed for digital lifestyles, standing out with unmatched reliability, simplicity, and future-ready innovation.

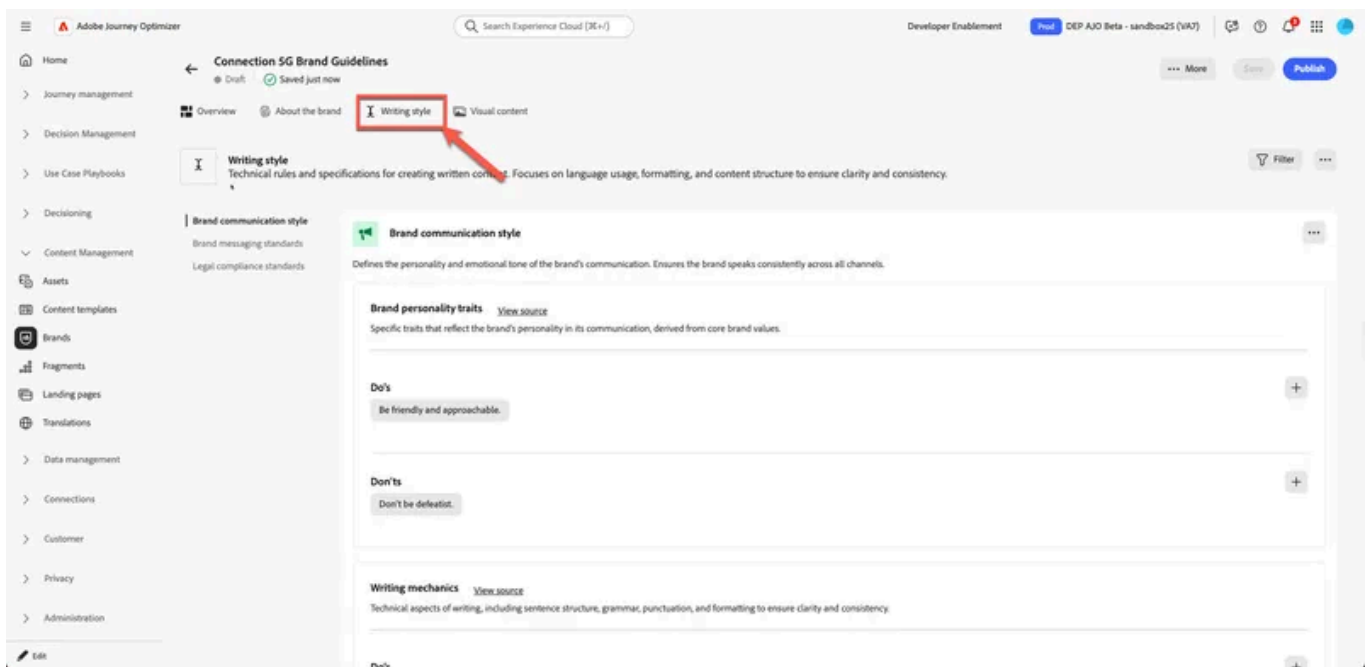
4. Click **Save**. (If you do not see Save button, click Overview tab first and click **save**)

You have now ensured that the brand's purpose, vision, and market positioning are clearly represented in AJO.

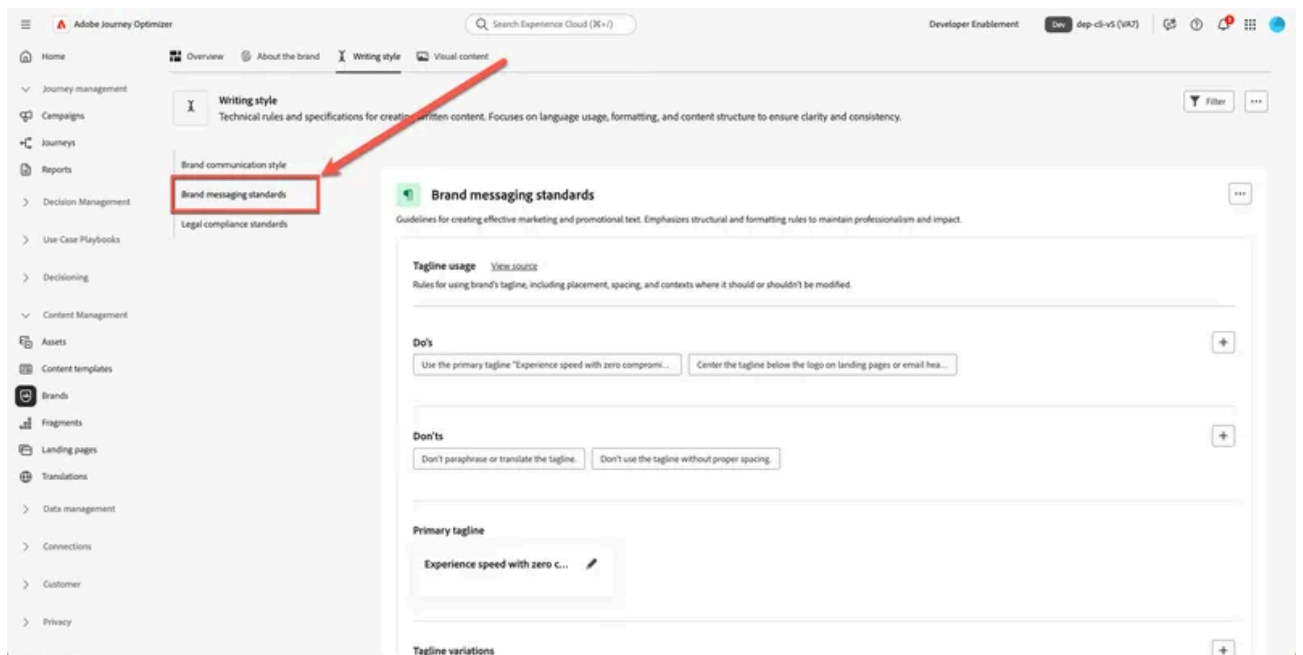
Add an Email Button Exclusion Rule

Next, you will enhance the brand by adding a rule that ensures email buttons are never written in a pushy way.

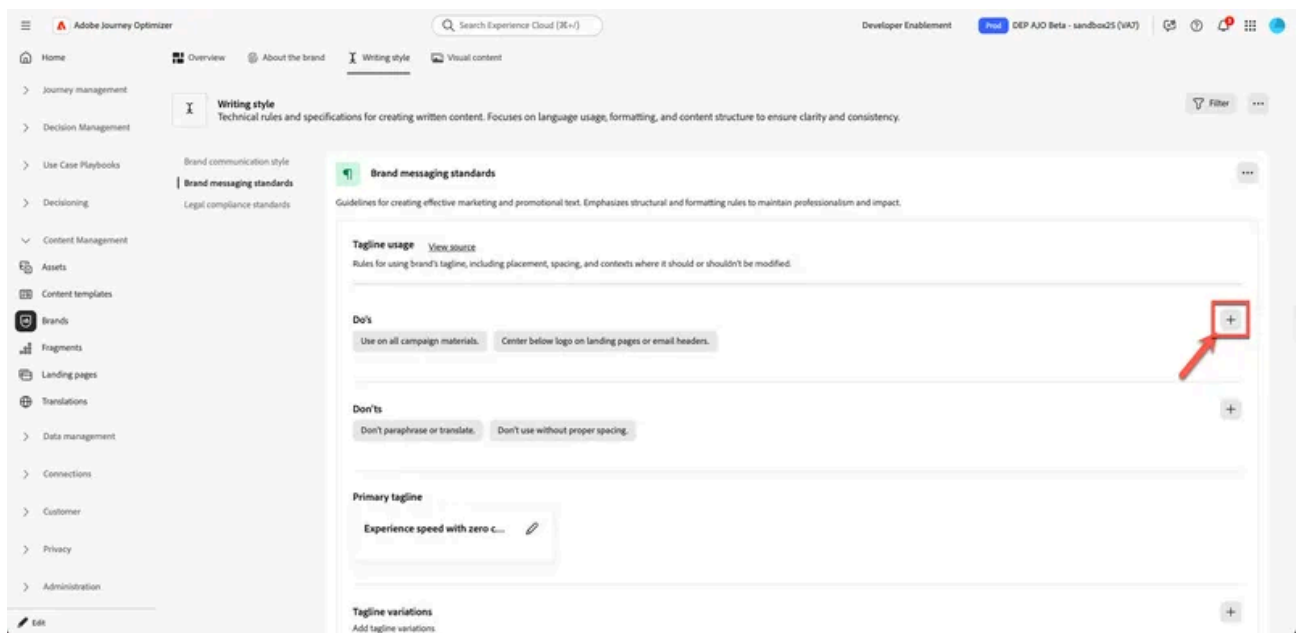
1. Go to the **Writing Style** tab.



2. Make sure you are in the **Brand communication style** section.



3. Under the **Don'ts** area, click the **plus** icon to add a new rule.



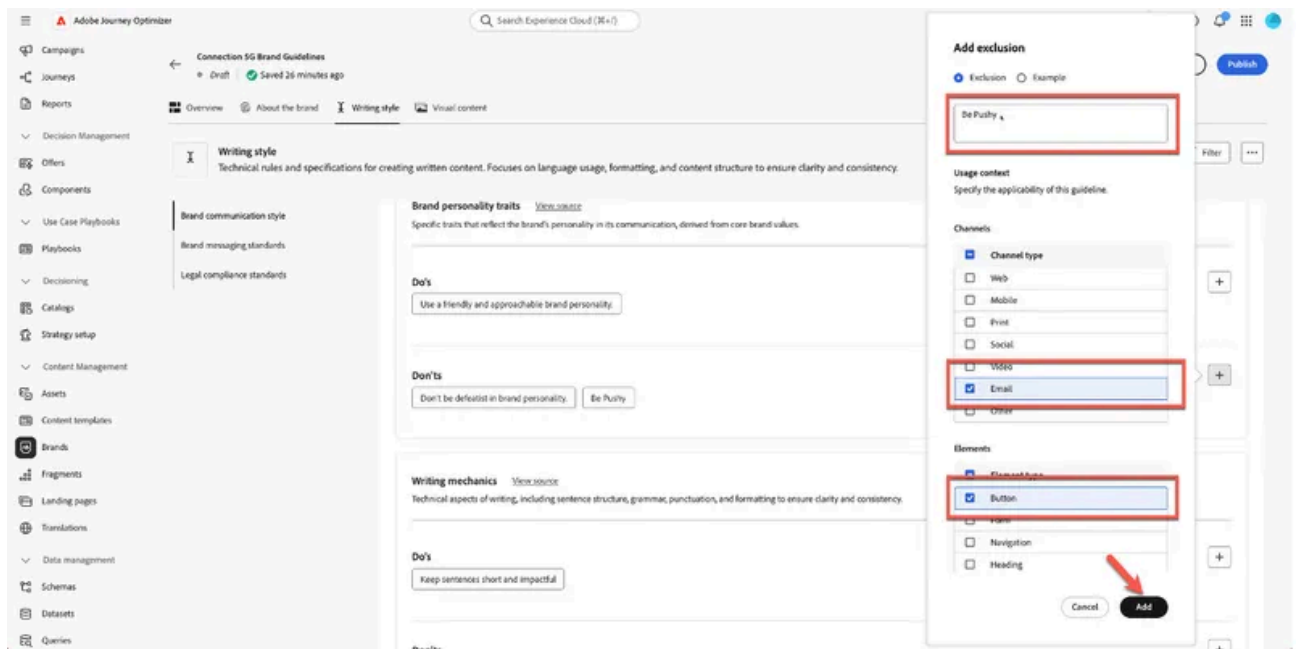
4. Configure the rule as follows:

- **Exclusion:** Be pushy

This is added as a Don't rule, meaning the brand does not want pushy CTAs

- **Channel:** Email
- **Element:** Button

5. Click **Add**.



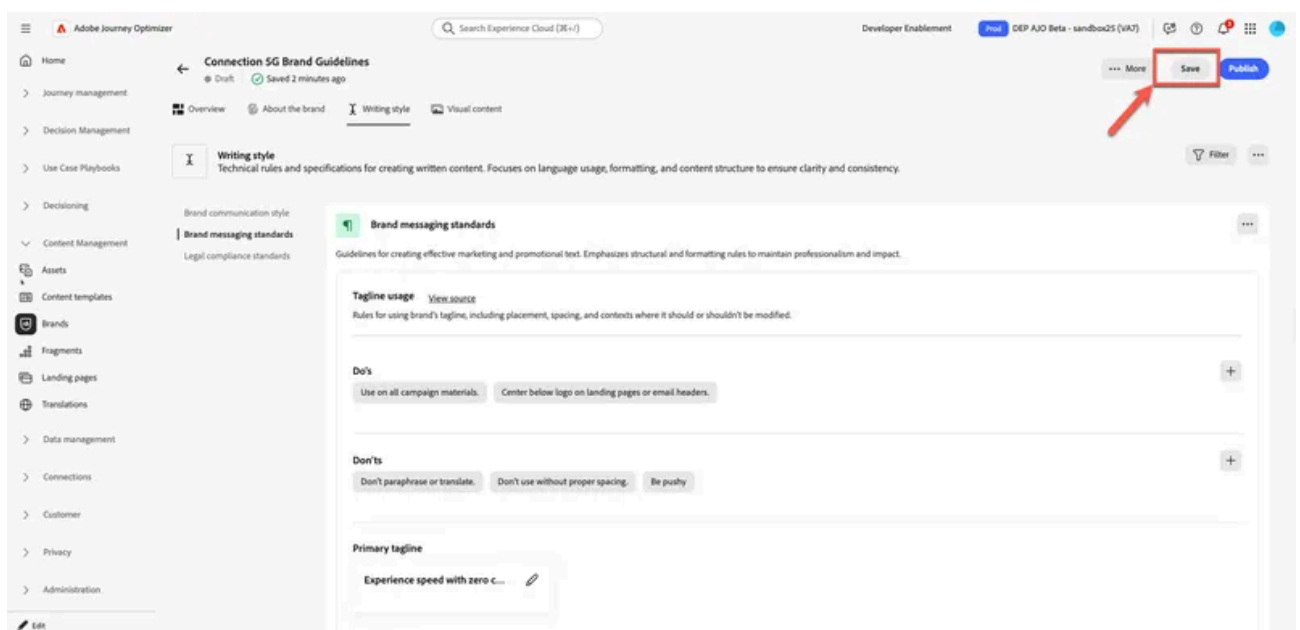
6. Confirm that the new Don't rule appears as **Be pushy** in the list.

Don'ts



7. Click **Save**.

This rule will be applied wherever AI Assistant or authors work on email button copy, keeping CTAs aligned with the Connection 5G tone.

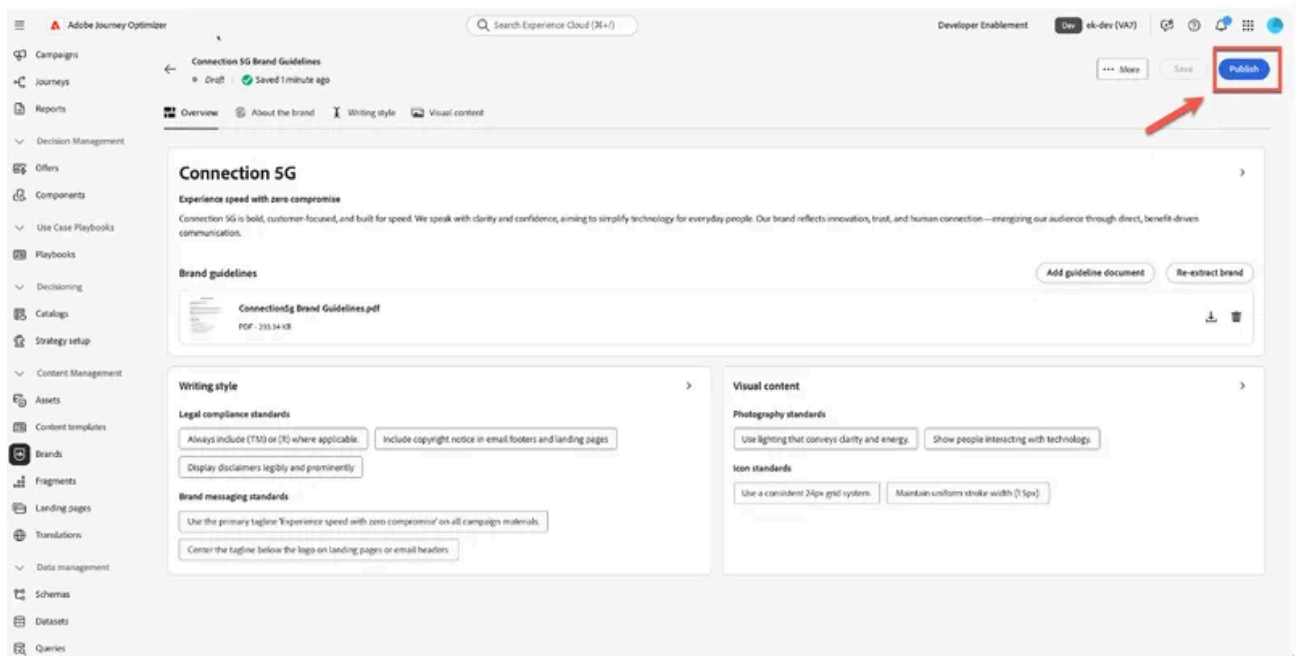


Note: You may find under "Don'ts" some other don't labels and not similar to the screenshot. Ignore this as it is expected behaviour.

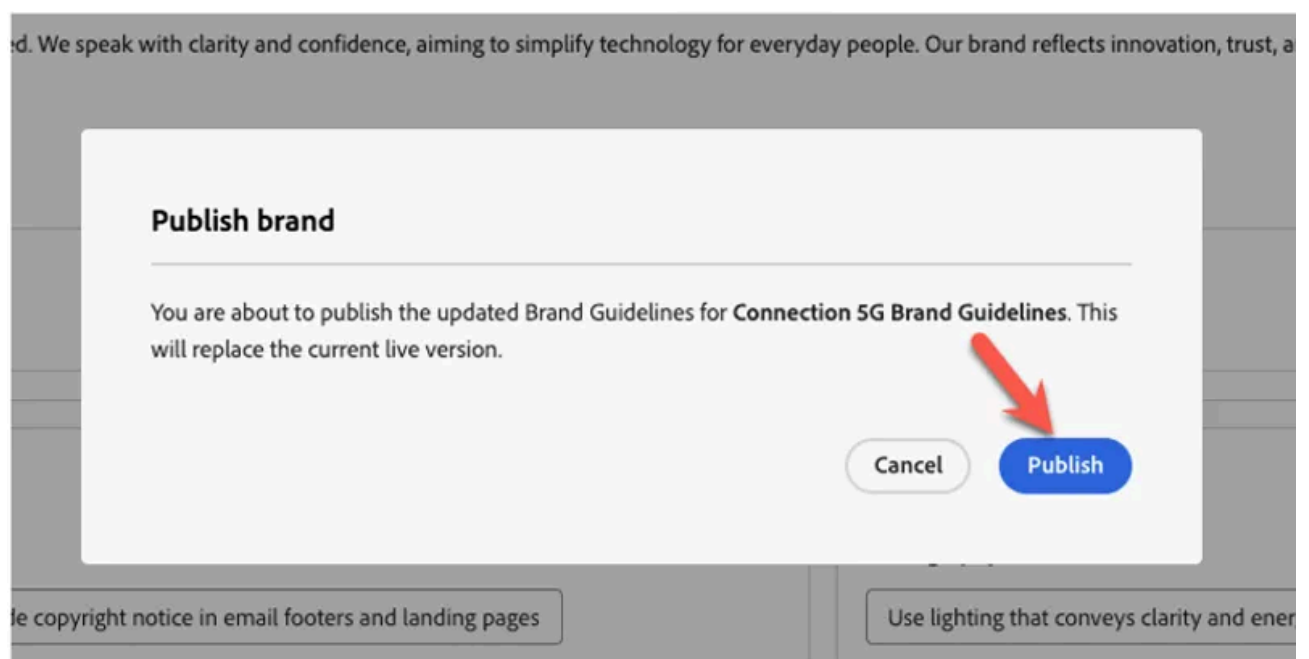
Publish the Brand Guidelines

Once you are satisfied with the configuration:

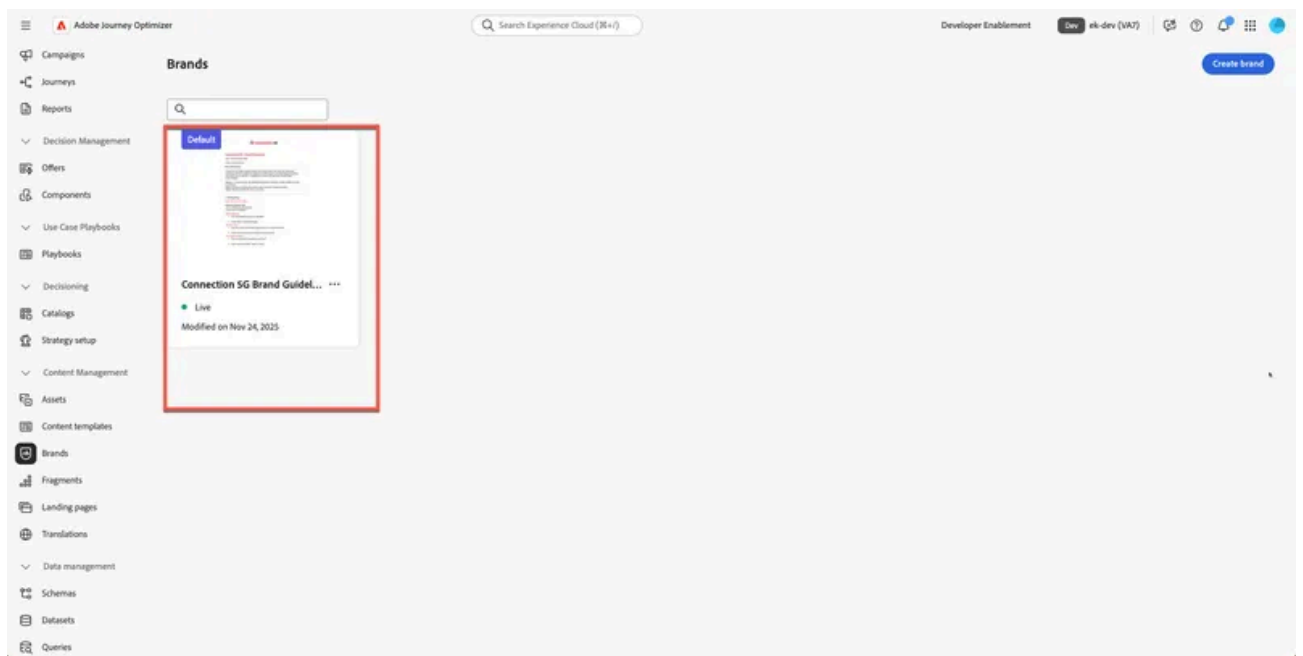
1. Go back to Overview tab. Click on Save.
2. In the top right corner, click **Publish**.



3. A confirmation dialog appears explaining that you are about to publish the updated Brand Guidelines for Connection 5G. Click **Publish** again to confirm.



3. Wait for the green confirmation bar to appear.
4. Click **Back** to return to the Brands list.
5. Verify that a new card appears for **Connection 5G Brand Guidelines** with a status showing it is Live and available.



Your brand is now live and ready to be used throughout Adobe Journey Optimizer.

Recap

In this module, you:

- Reviewed the Connection 5G Brand Guideline PDF.
- Created a new brand for Connection 5G inside Adobe Journey Optimizer.
- Uploaded the brand guideline file and allowed AJO to extract key information.
- Reviewed and refined the About the Brand, Writing Style, and Visual Content tabs.
- Added a specific exclusion rule so email buttons are never pushy.
- Published the brand so it can power AI Assistant, Brand Alignment, templates, and fragments.

You now have a fully configured and published **Connection 5G** brand profile that will be used across the rest of the lab to keep all content on-brand.

7.3. Building Content Fragments

Content creation with Templates & Fragments

Purpose: Learn how to create reusable fragments in Adobe Journey Optimizer, then apply them inside a real email within a journey.

Learning Objectives

By the end of this module, you will be able to:

1. Break down an email design into reusable fragments.
2. Create header, footer, banner, body, and CTA fragments.

Why Fragments matter

Fragments allow you to create consistent, brand-aligned content that can be reused across emails, campaigns, and journeys.

Fragments

Reusable building blocks such as:

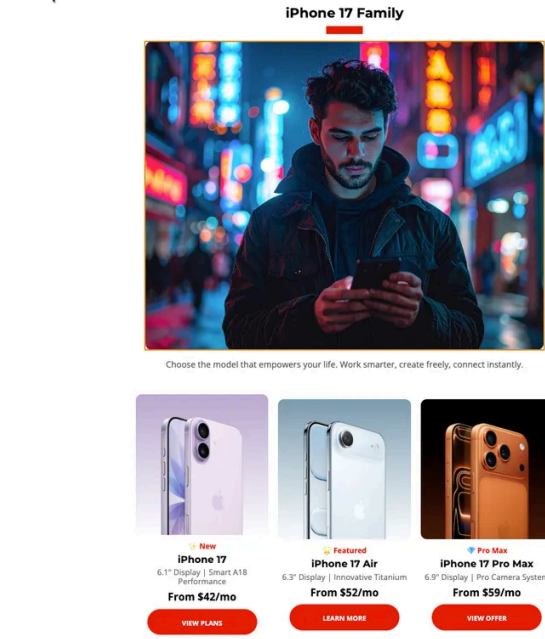
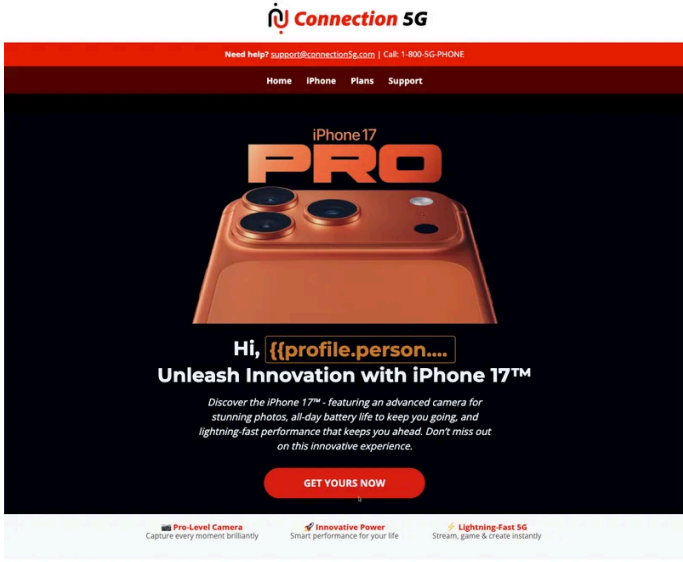
- Headers
- Footers
- CTAs
- Banners
- Legal disclaimers

Whenever a fragment is updated, all emails using it update automatically.

How this fits into email creation

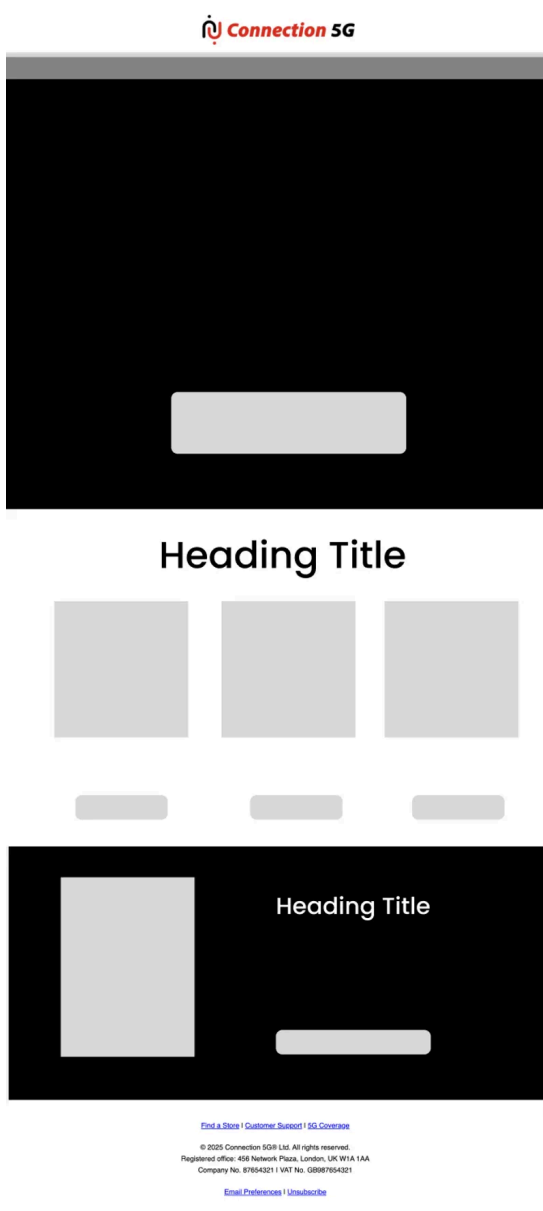
- **Create fragments** for elements that rarely change.
- **Build a template** that uses those fragments.
- **Use the template** in your campaign email and customise its content.

Below is the final email you will create from this lab.



© 2025 Connection 5G® Ltd. All rights reserved.
Registered office: 456 Network Plaza, Lehi, US
Company No. 87654321 | VAT No. 2312234324

But the design team normally provides you with templates such as this:



Step 1: Create Content Fragments

The below template is a generic design template and our goal is to break this down into repeatable content blocks. In Adobe journey optimizer this is called **Fragments**.

The first step is to identify how many fragments do we need to create. In this template it makes sense to use 5 fragments as shown below.

Heading Title



Heading Title



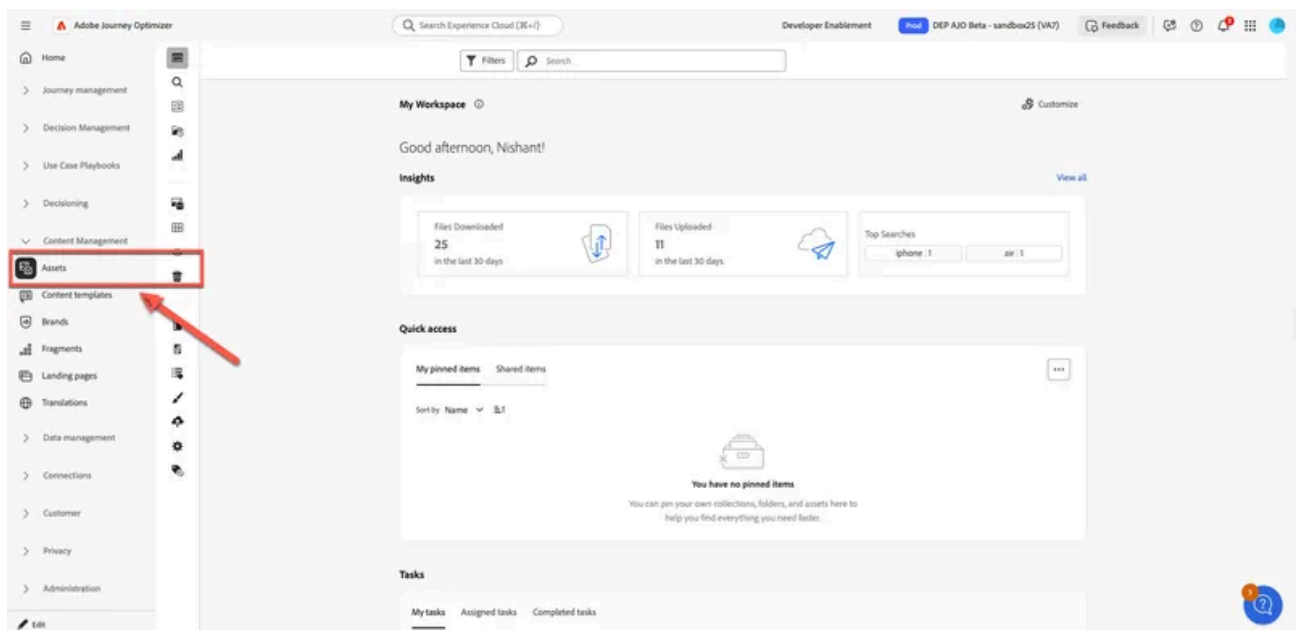
We have identified the templates requires 5 fragments as follows.

- Header
- Banner
- CTA
- Body
- Footer

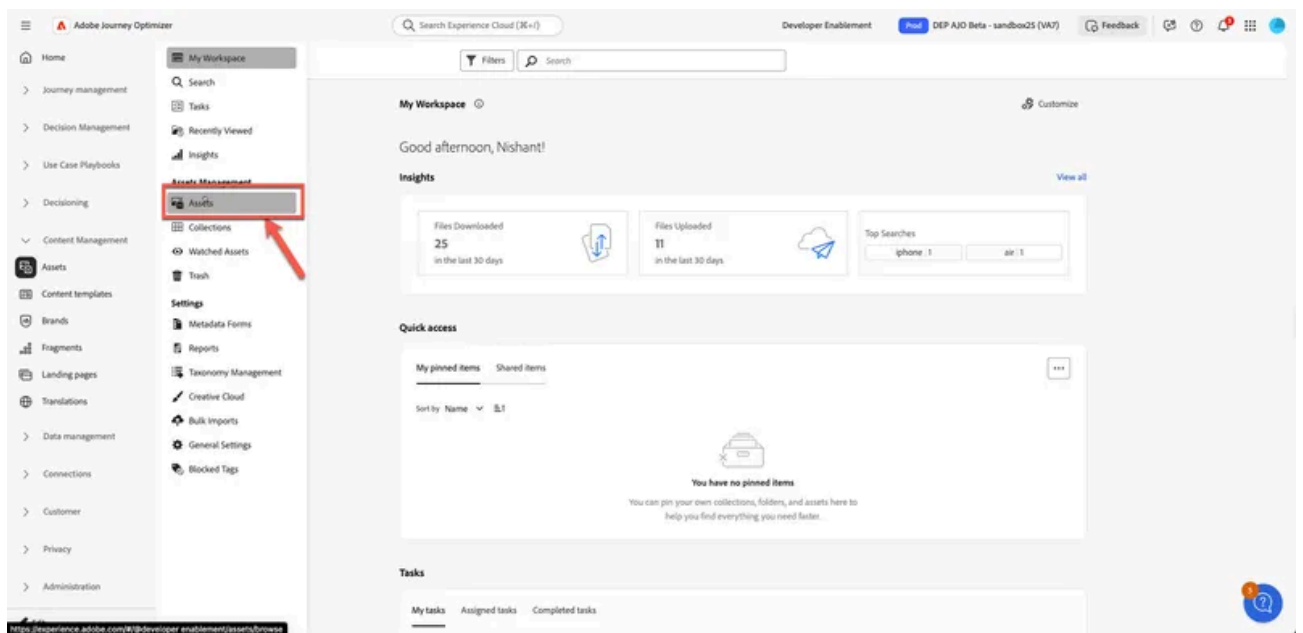
For this exercise we will just create one header fragment in order to save time.

Let us create a header fragment to start with. However, before we start creating fragment we need to setup an asset folder as we are sharing the assets enviroment. To achieve this we will first create your own folder.

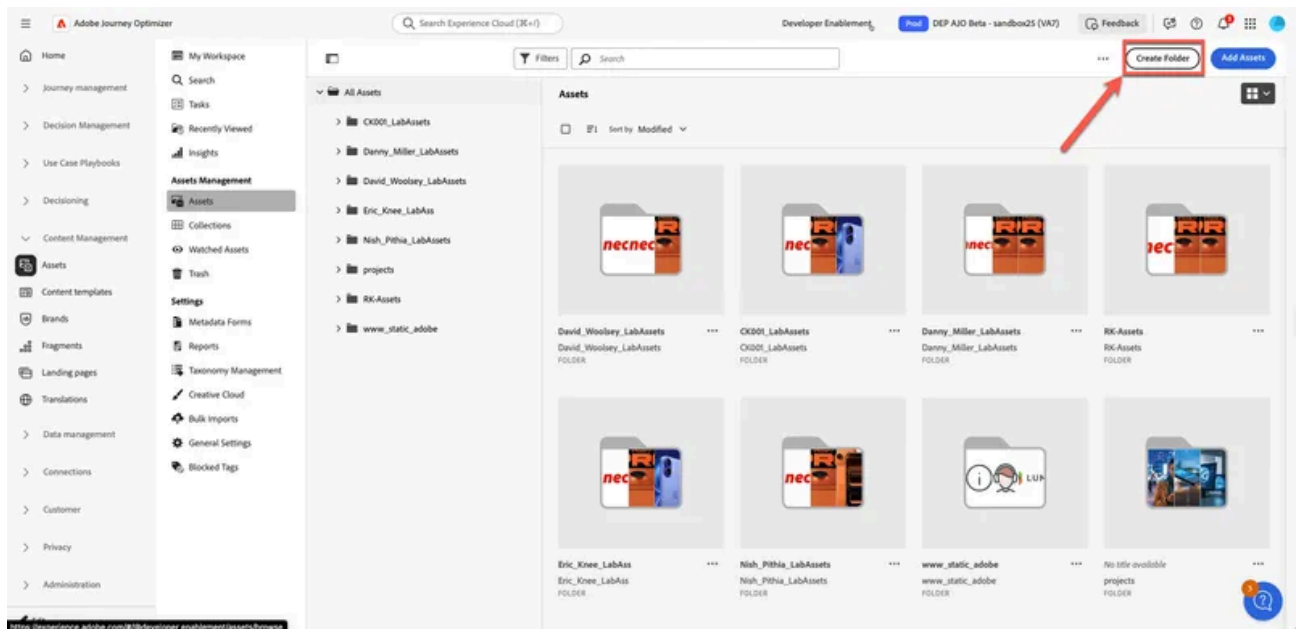
1. From the left-hand navigation, locate the **Content Management** section and click on **Assets**



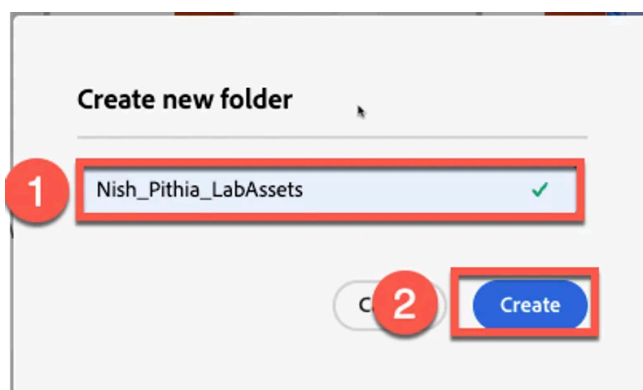
2. Click on **Assets** under Assets Management section.



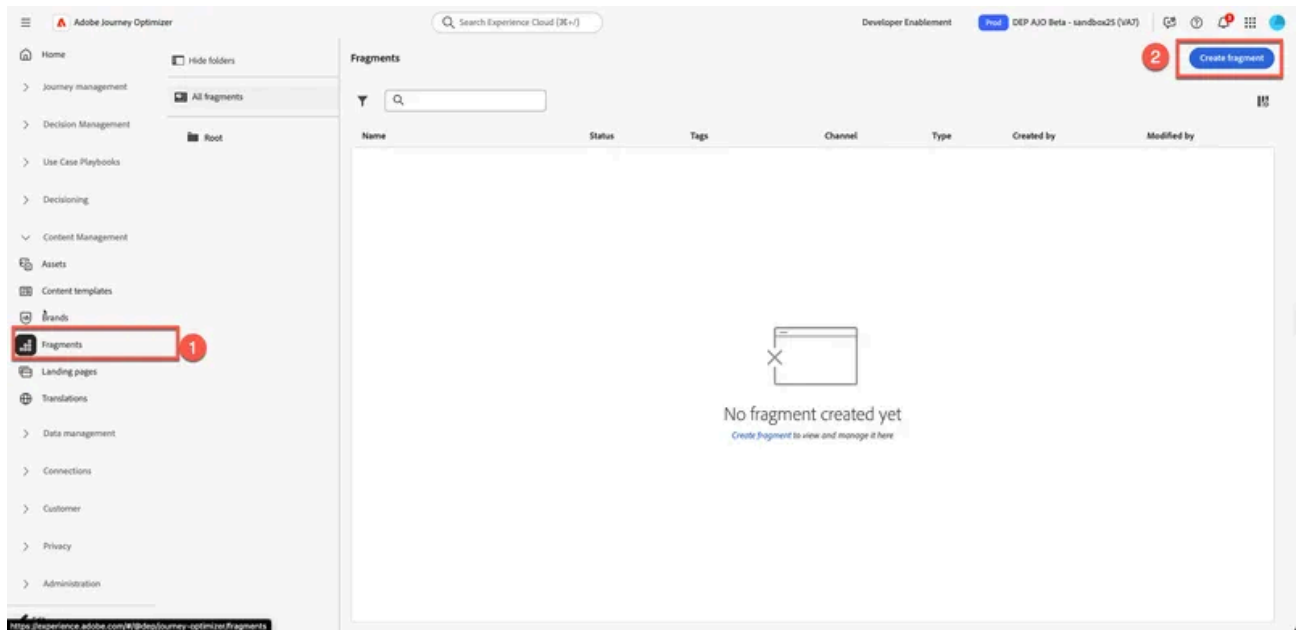
3. Create a folder by clicking **"Create Folder"** button.



4. Give a name like your first and last name. eg. Nish_Pithia_LabAssets (Something you can remember)

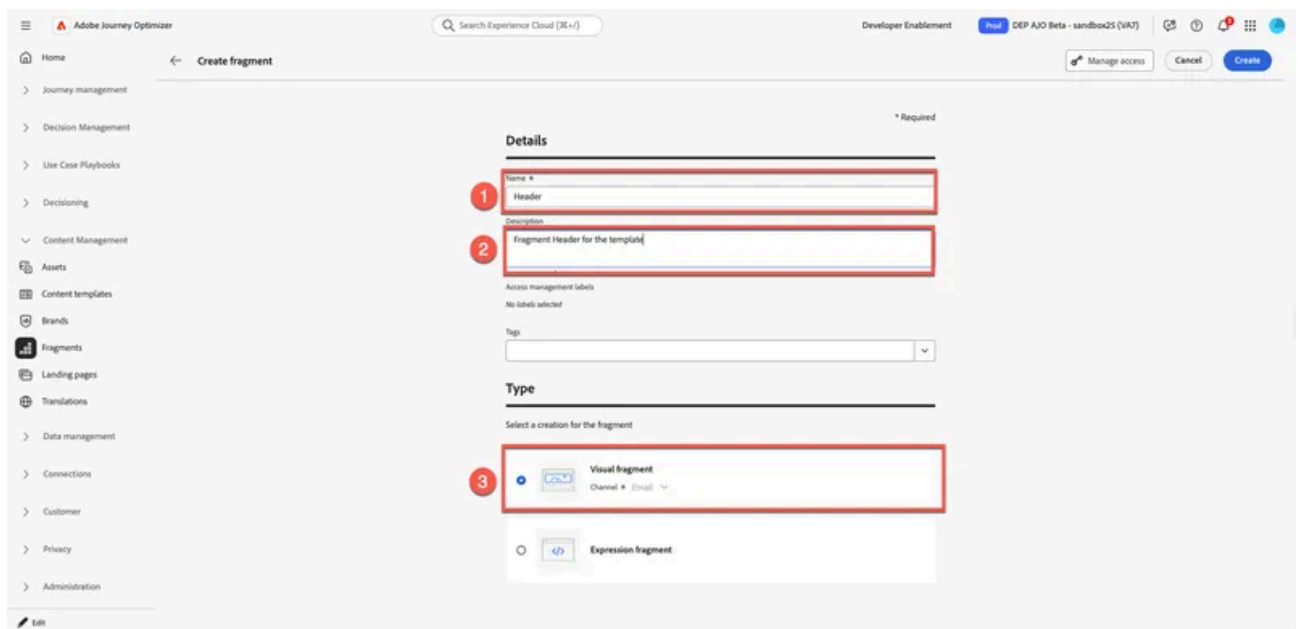


5. **Create a new fragment:** Under Content Management click on **Fragments** and create new fragment.

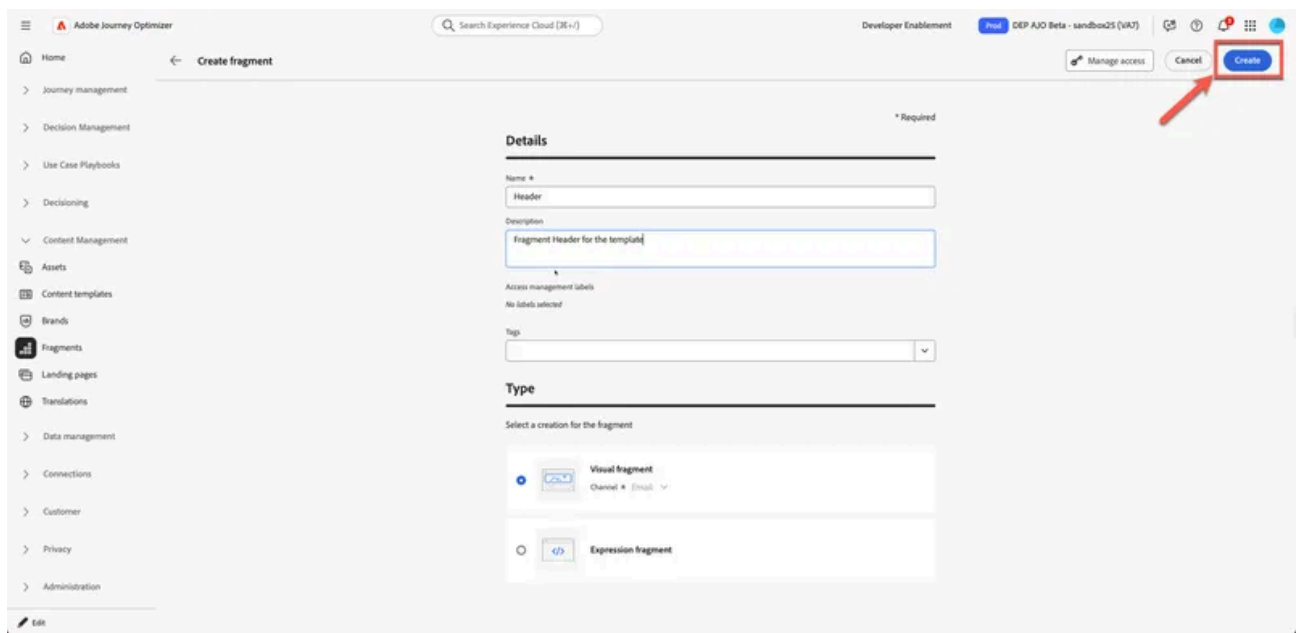


2. Give a friendly name as shown below. Add all details as follows:

1. **Name:** Header
2. **Description:** Fragment Header for the template
3. **Type:** Select Visual fragment

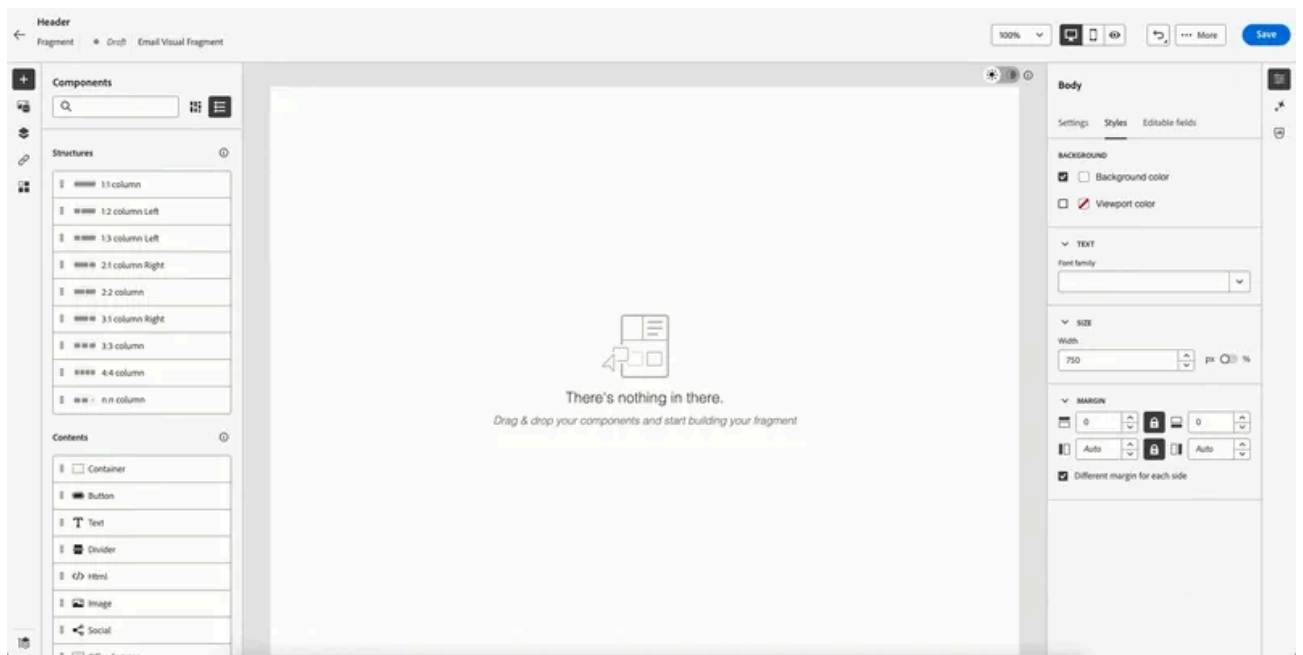


4. Click on **Create button** on your top right.



You will now be presented with a blank fragment creator screen.

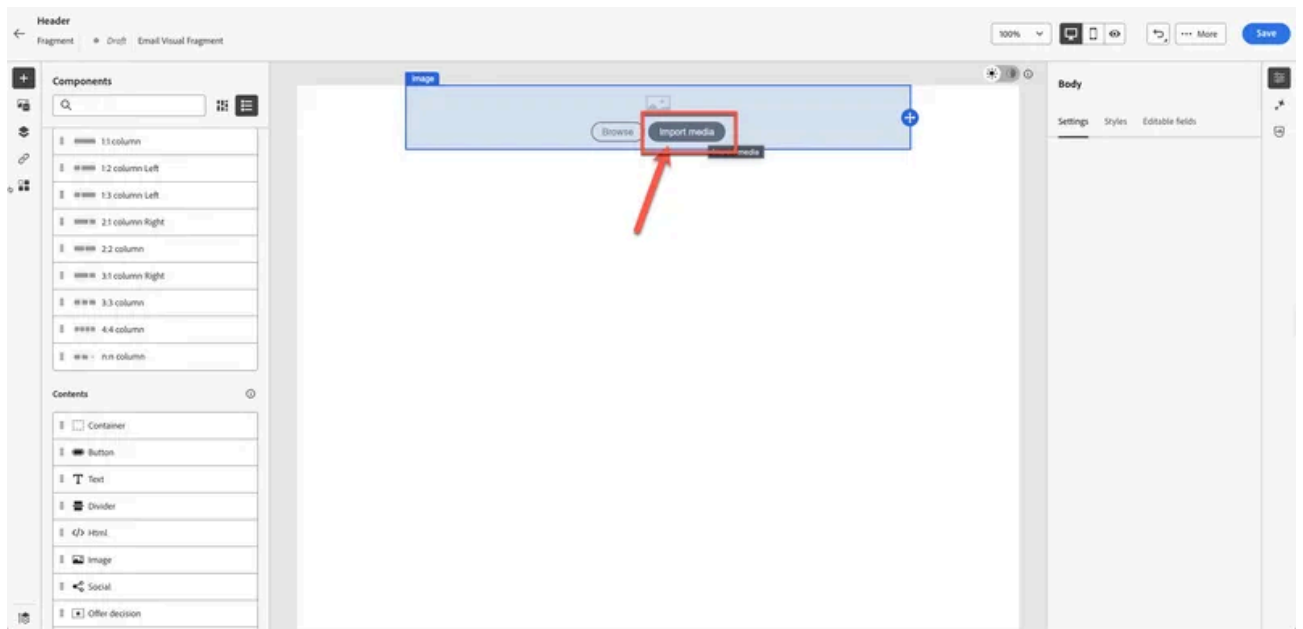
5. Click on 1:1 Columns under Structures and drag on the canvas as shown below.
(Please click on the image below to see animated graphic)



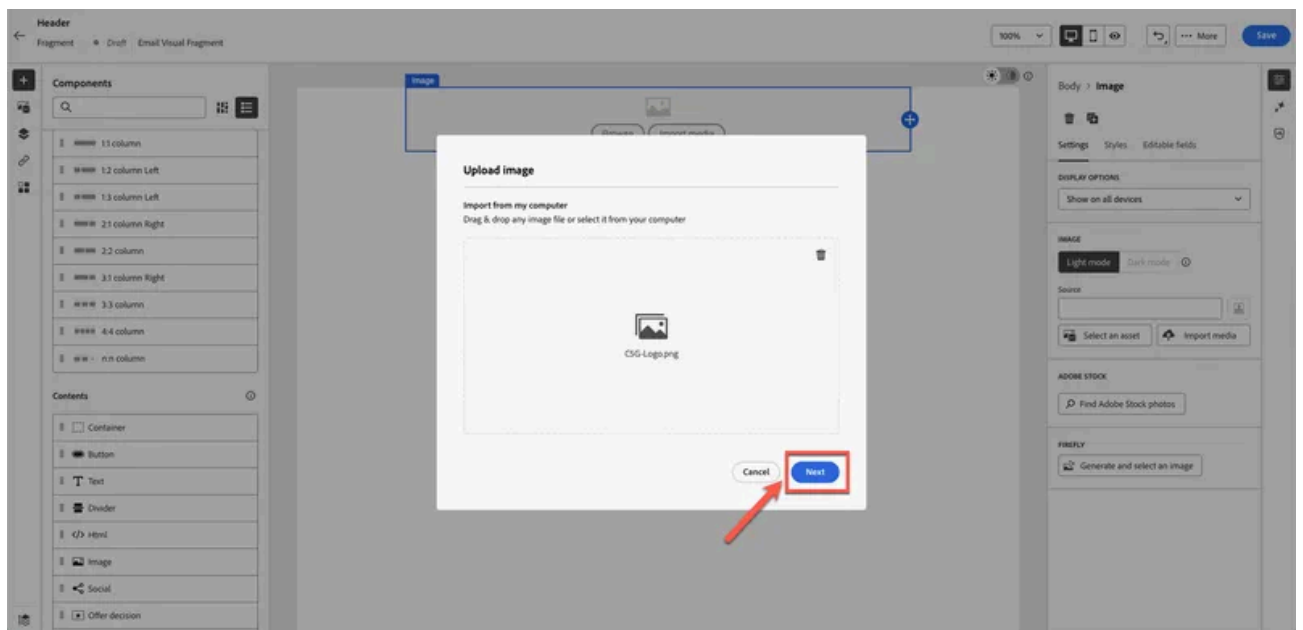
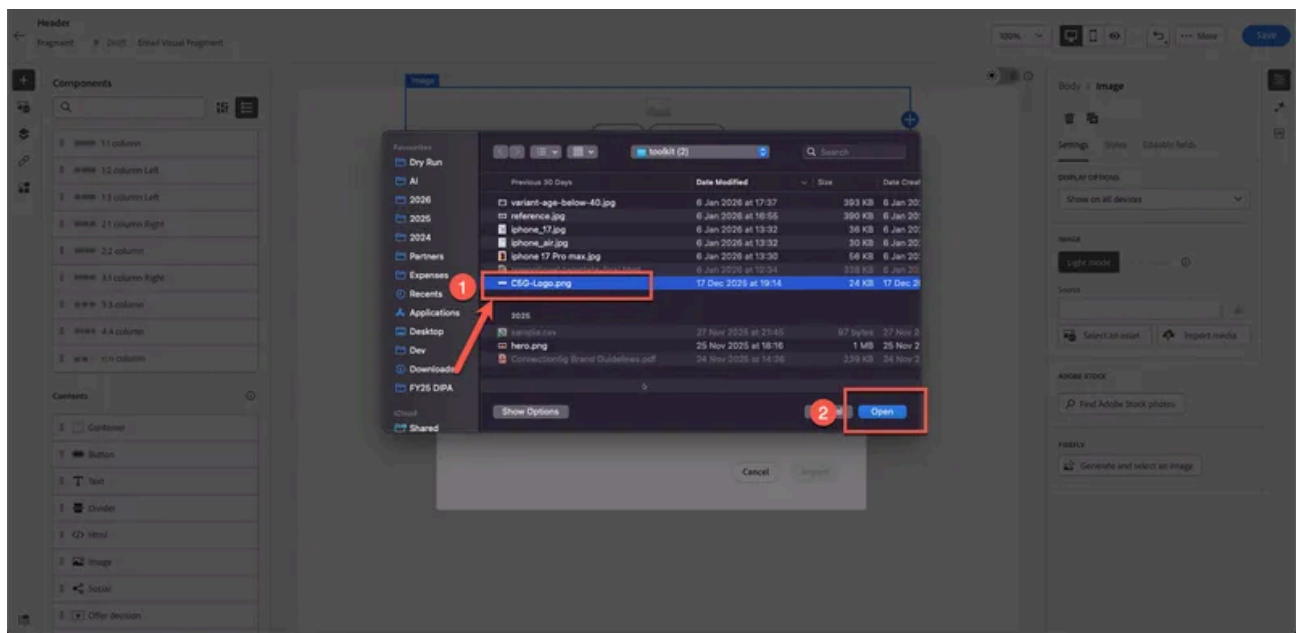
6. Next, drag "**image**" on the 1:1 row which we just added



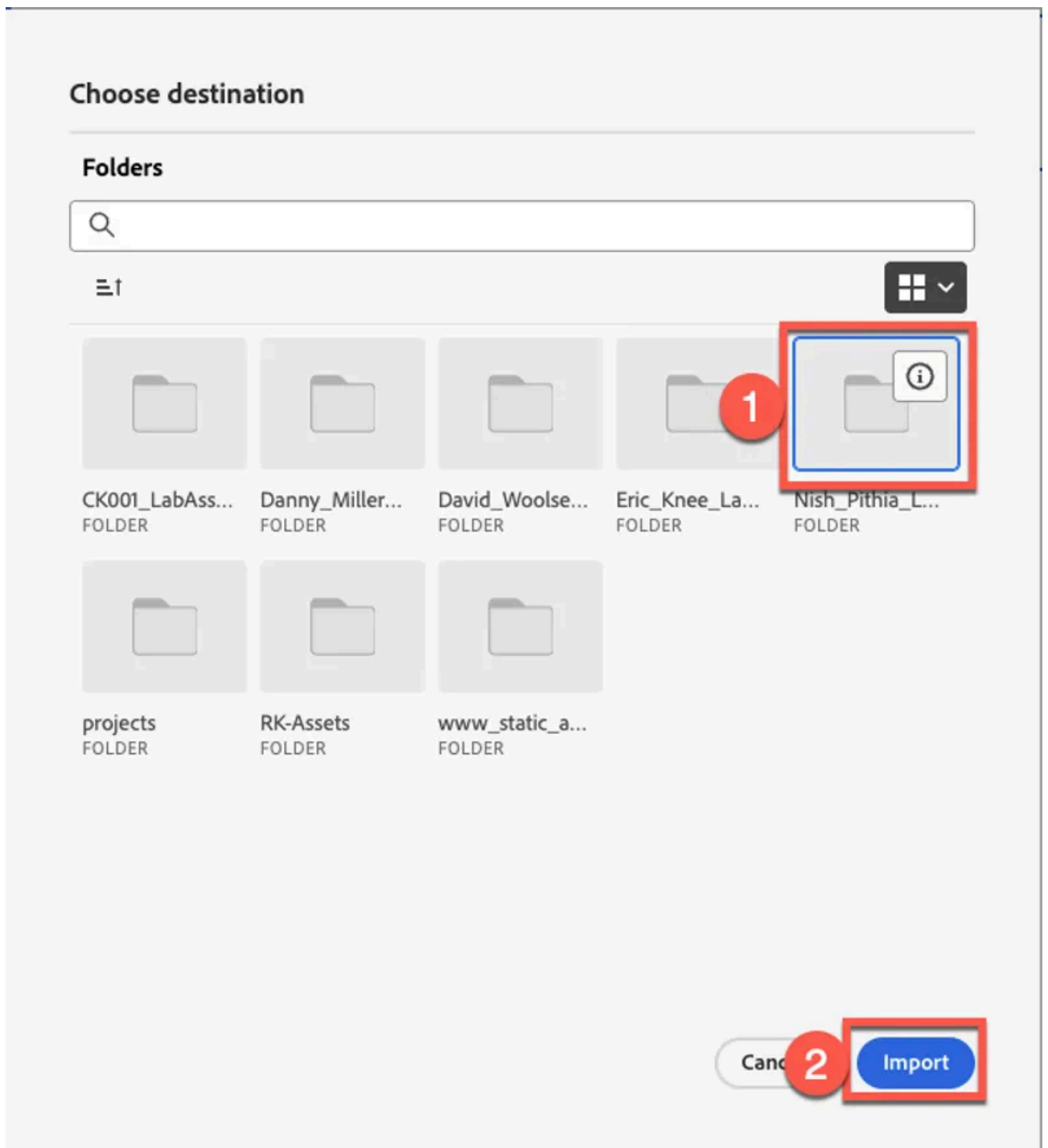
7. Upload the logo image that you have been provided. Click on **"Import media button"**



8. **Upload the logo:** You will need to upload logo (*C5G-Logo.png*) from the toolkit folder of images and click next.

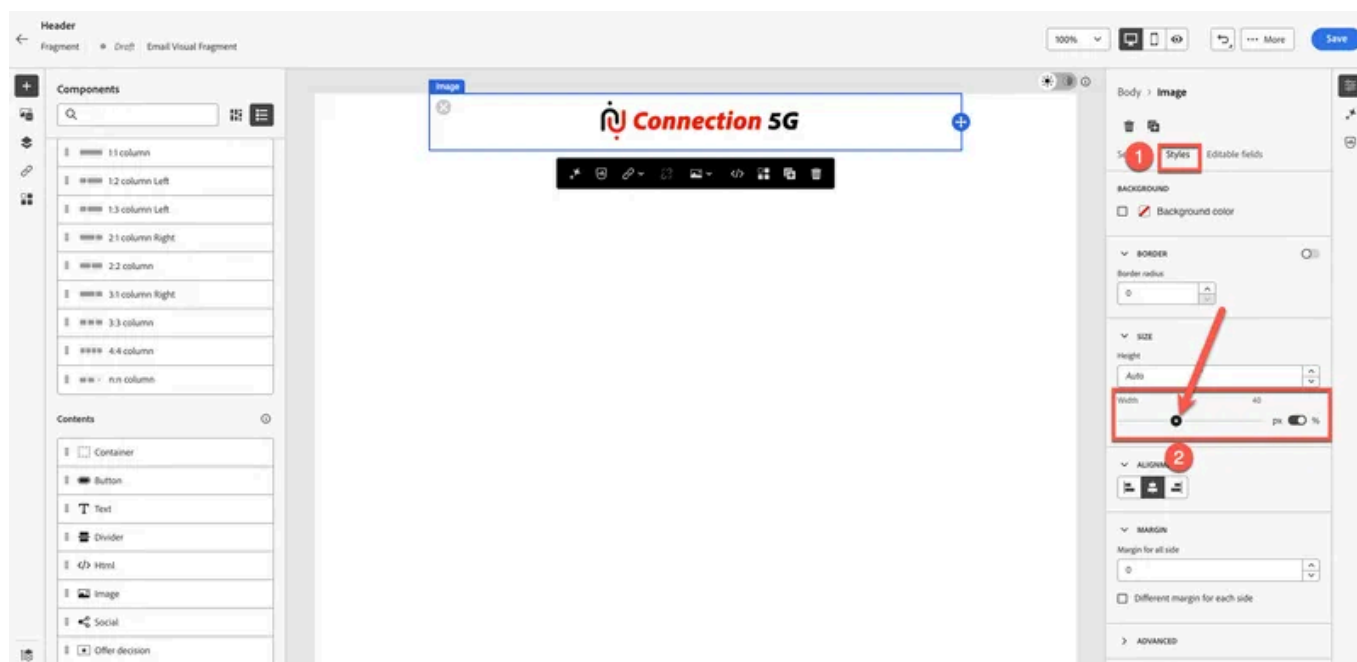


9. Select the **asset folder** that you have created, then click **Import**. The file will be saved in your folder.

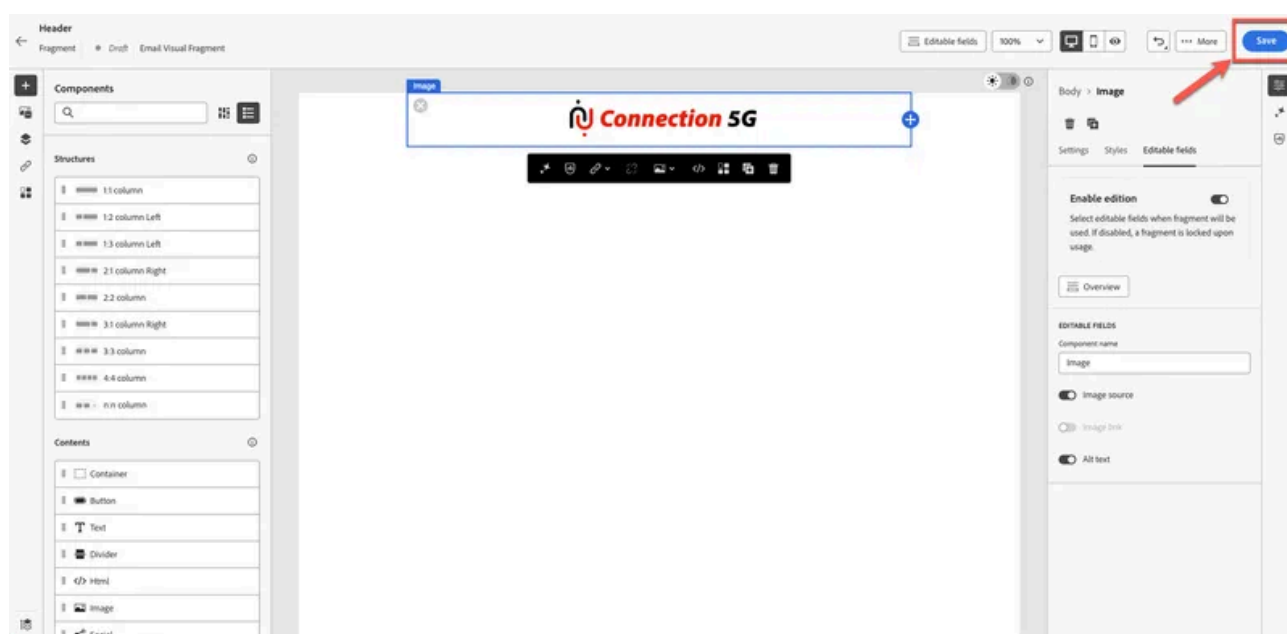


10. The logo is placed correctly, but it is too large and needs to be resized. To resize the logo, update its properties. Click the **Style tab** and set the width to 40% by dragging the slider, as shown below.

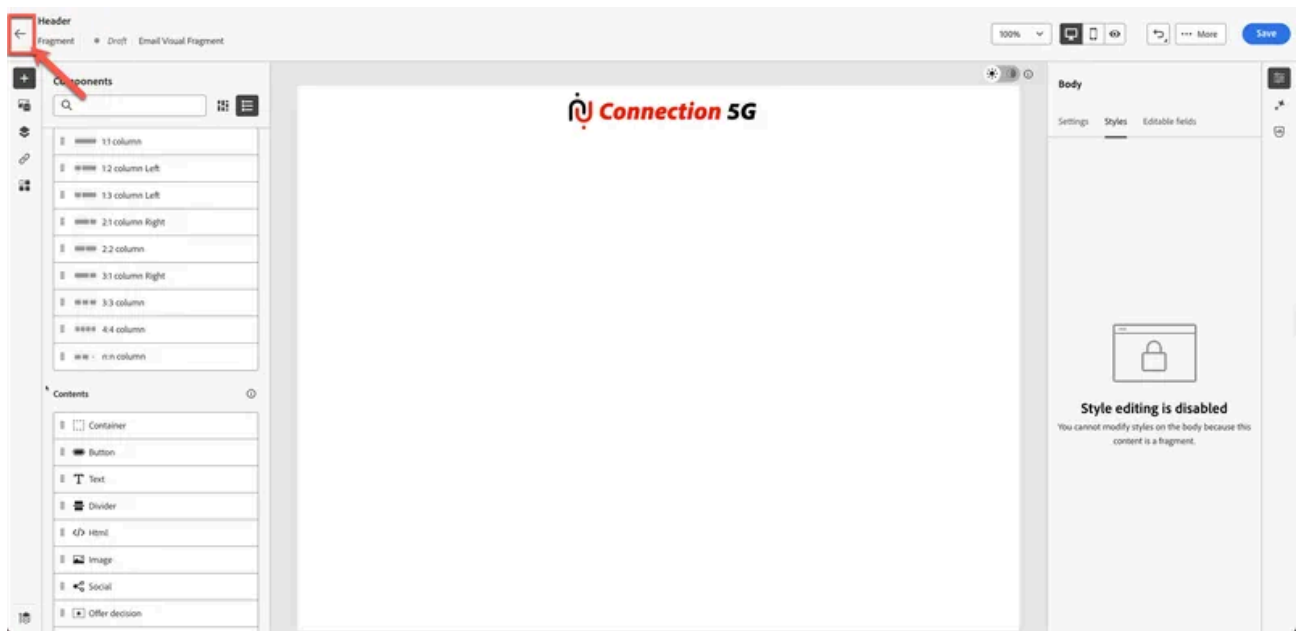
Note that the the toggle button is on means that the 40 number reprints % and not pixel). if you want an absolute pixel perfect value, toggle the button to px.



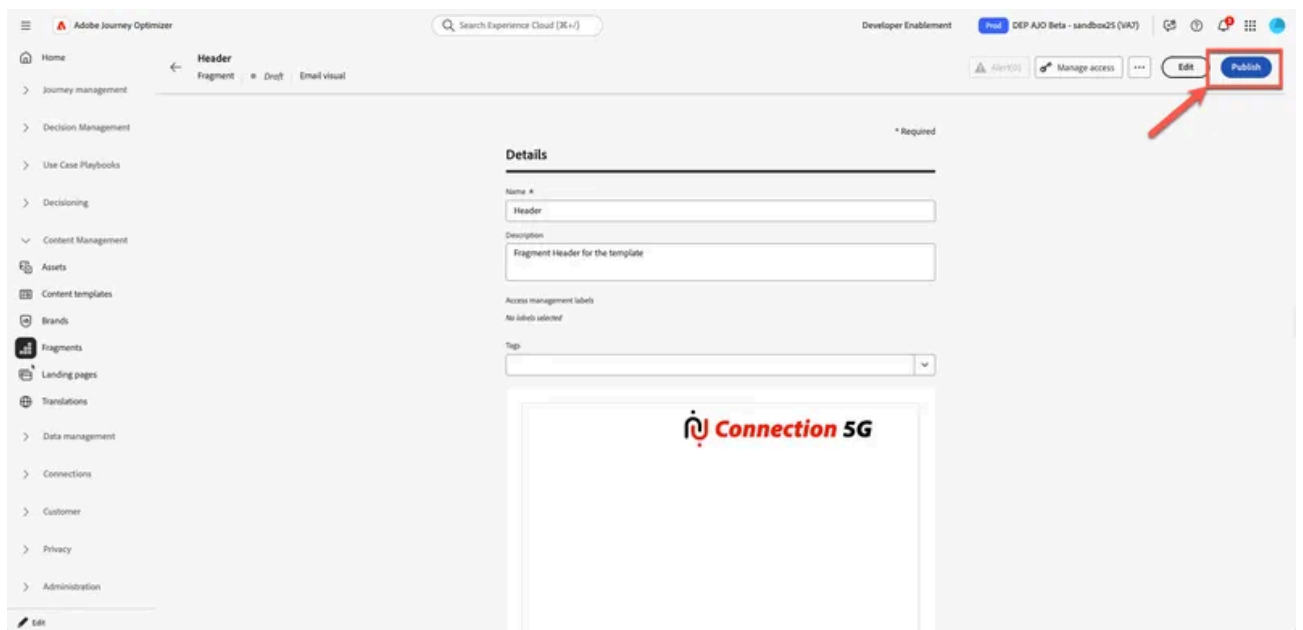
11. Click **"Save"** and your fragment is saved. You will get a green bar notification on the confirmation.



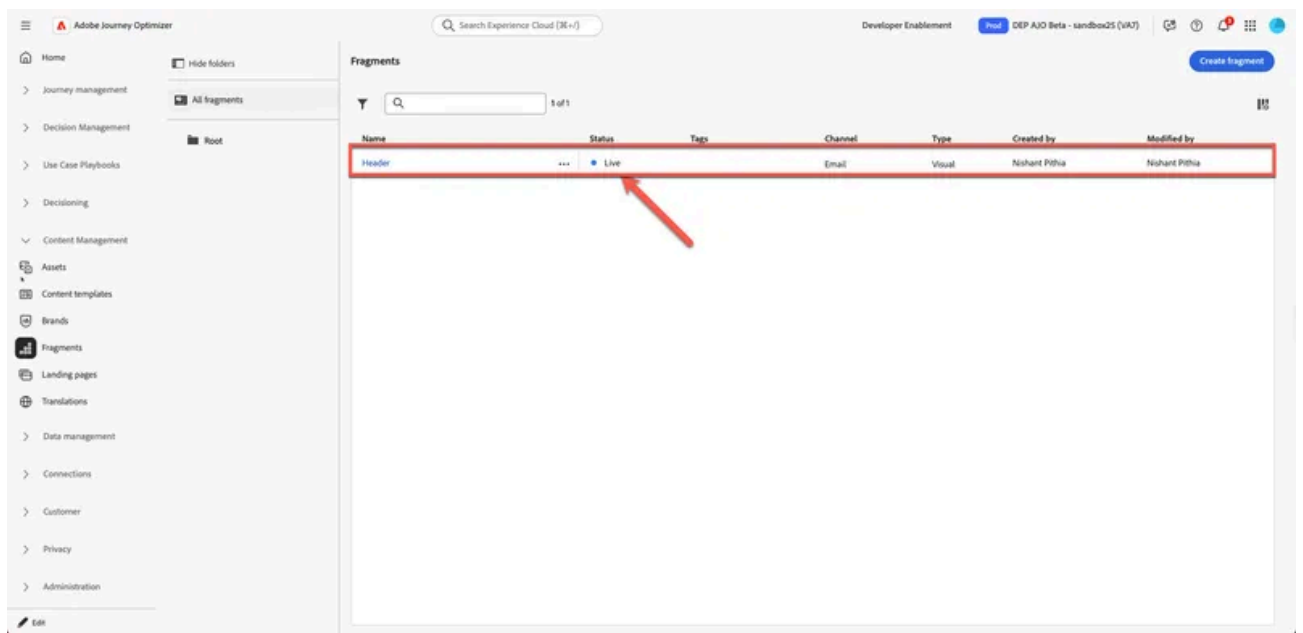
13. The fragment saved is in a draft mode. Before you use you will need to publish it. Click on the **back** button.



14. Click "**Publish**" button. You will see a message "Publishing fragment, this may take some time. We will notify once done." on confirmation. Your fragment is ready to be used for template creation.



You will see the status will change to "**Live**". At this point, we have completed building a header fragment which we will be used in our next step.



Note that in this exercise, we will create only one fragment. In practice, architects may choose to create multiple fragments, such as headers, footers, or other reusable components.

Recap

In this module, you successfully:

- Broke down an email into reusable header fragment
- Created a header content blocks

You are now ready to move on to next module - **Content Creation - Template**, where you will use fragment you created to generate new template.

7.4. Building Content Template

Content creation with Templates & Fragments

Purpose: Learn how to create reusable templates in Adobe Journey Optimizer

Learning Objectives

By the end of this module, you will be able to:

1. Build a full email template using imported HTML and fragments.

Why Templates matter

Templates allow you to create consistent, brand-aligned content that can be reused across emails, campaigns, and journeys.

Templates

Blueprints that structure:

- Header placement
- Body content area
- Footer area
- Standard layout styling

Templates ensure brand consistency across teams and save significant creation time.

Create a New Template Using Fragments

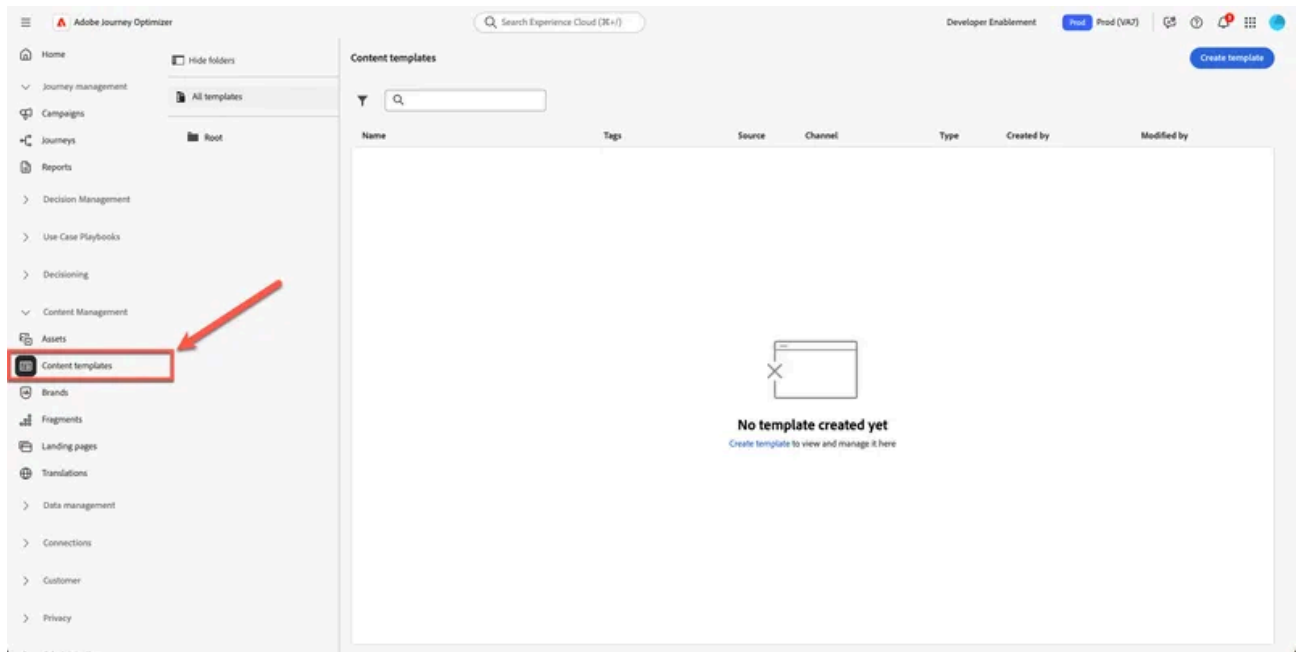
Templates help users reuse full layouts across campaigns. Content templates in Adobe Journey Optimizer are powerful tools designed to simplify and streamline the way you create reusable content for campaigns and journeys. Whether you're crafting an email, SMS, or push notification, templates help you save time by providing pre-designed structures that can be easily customized and shared across projects.

For an accelerated and improved design process, create standalone templates to reuse custom content easily across Journey Optimizer campaigns and journeys.

This functionality allows content-oriented users to work on templates outside campaigns or journeys. Marketing users can then reuse and adapt these standalone content templates inside their own journeys or campaigns.

Create Template

1. Go to **Content Management** → **Content Templates**.



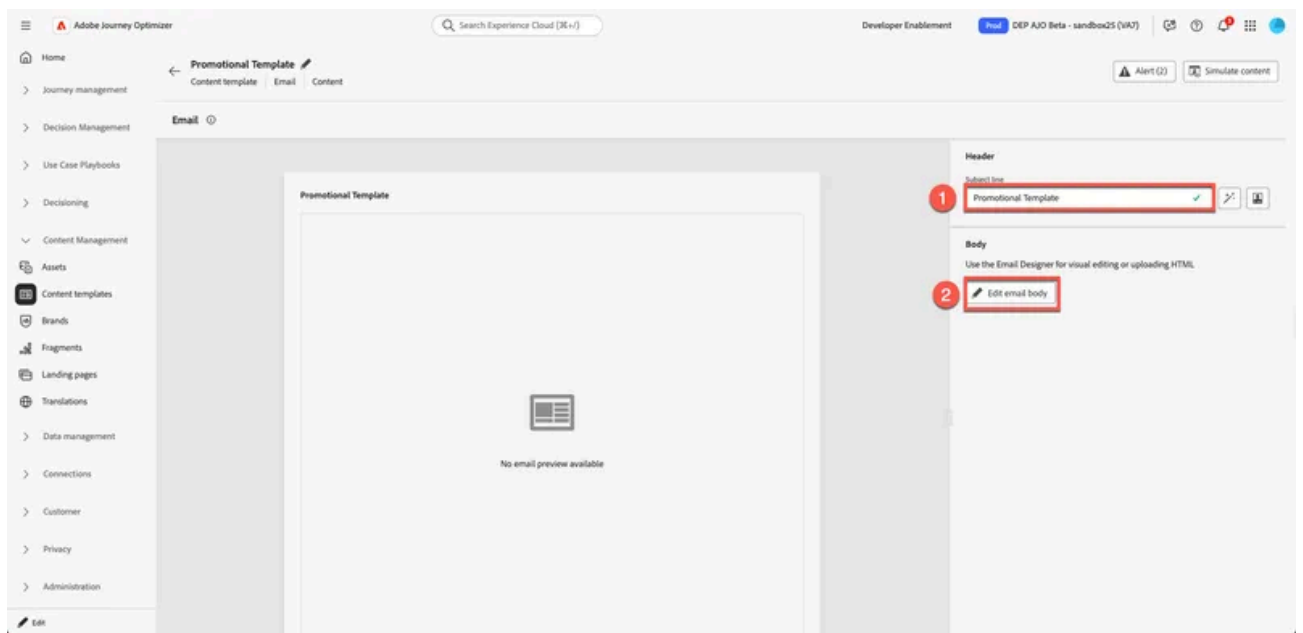
2. Click **Create Template** and then fill in the following:

- **Name:** Promotional Template
- **Description:** Promotional Template for phone products
- **Channel:** Email

3. Click **Create**.

Add Subject Line & Open Email Designer

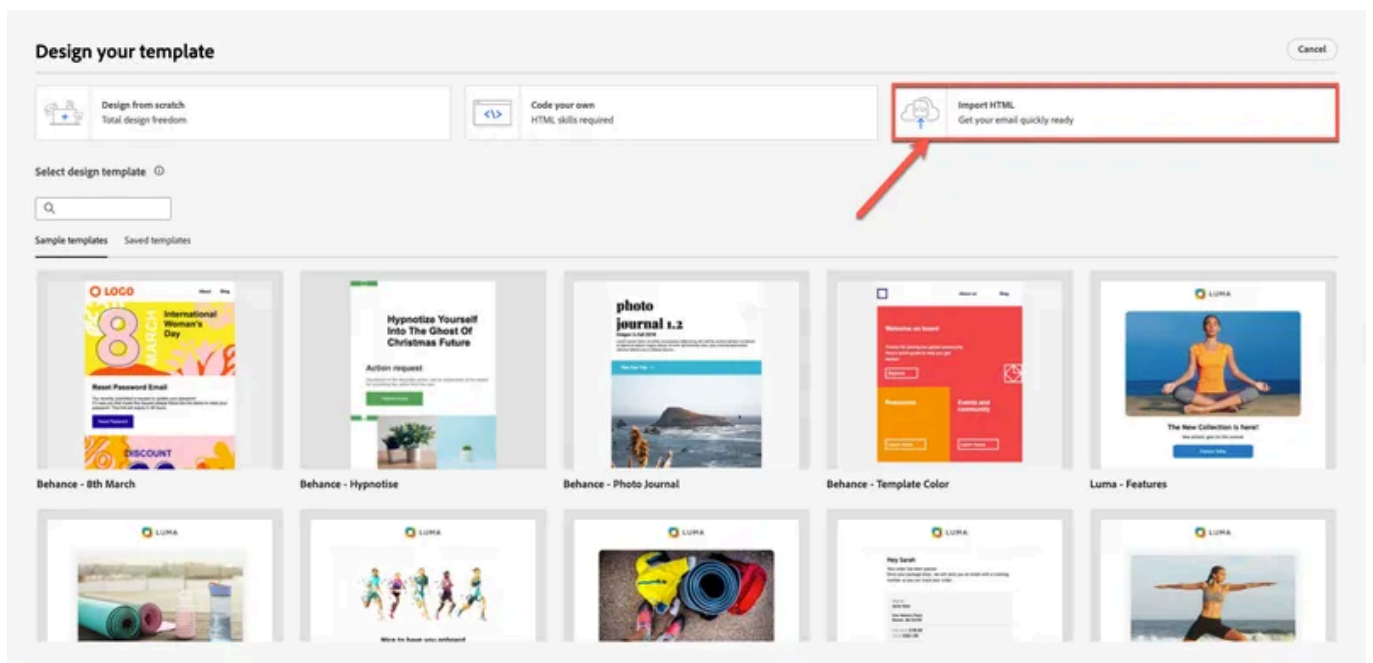
1. Add subject line: `Promotional Template` and click **on the email body** to open it to edit



2. You will see three options:

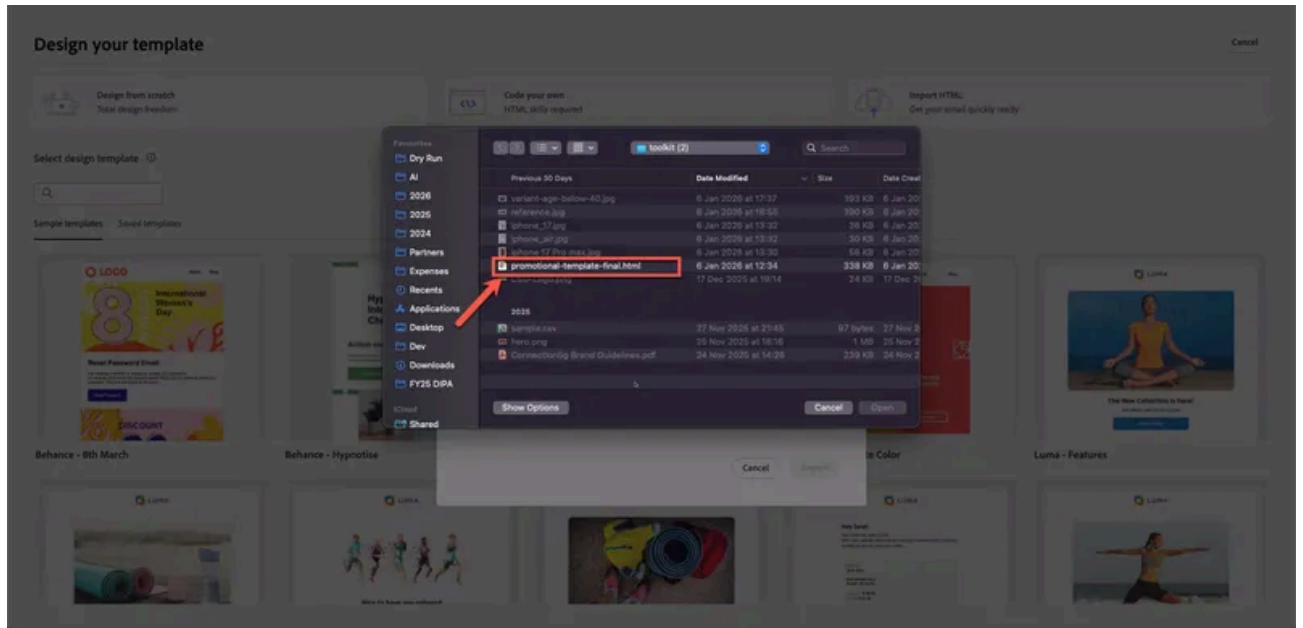
1. Desing from scratch
2. Code your own
3. Import HTML

We will select third option. Click **Import HTML**

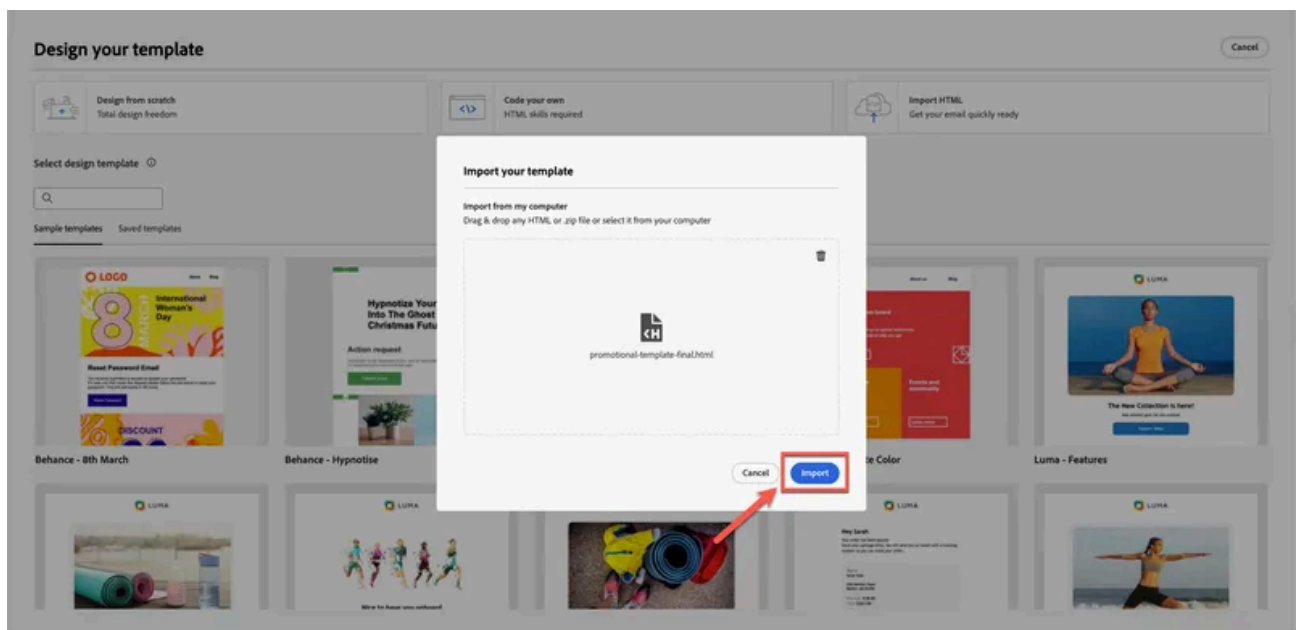


Import Provided HTML Template

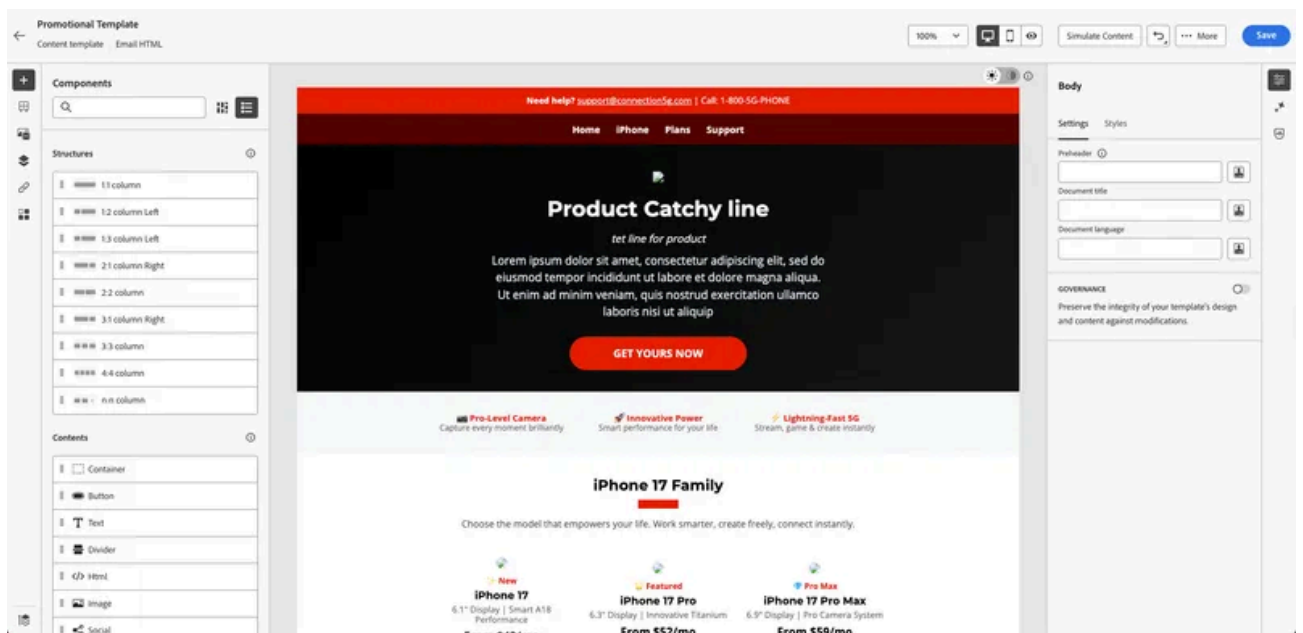
1. Upload the template html file from the toolkit folder `promotional-template-final.html`



2. Click on Import button to **import** the template.



3. Wait for the layout to render. You will notice issues like broken image links and missing branding. (This is expected behaviour as we have placeholder assets)



Explore Template Structure

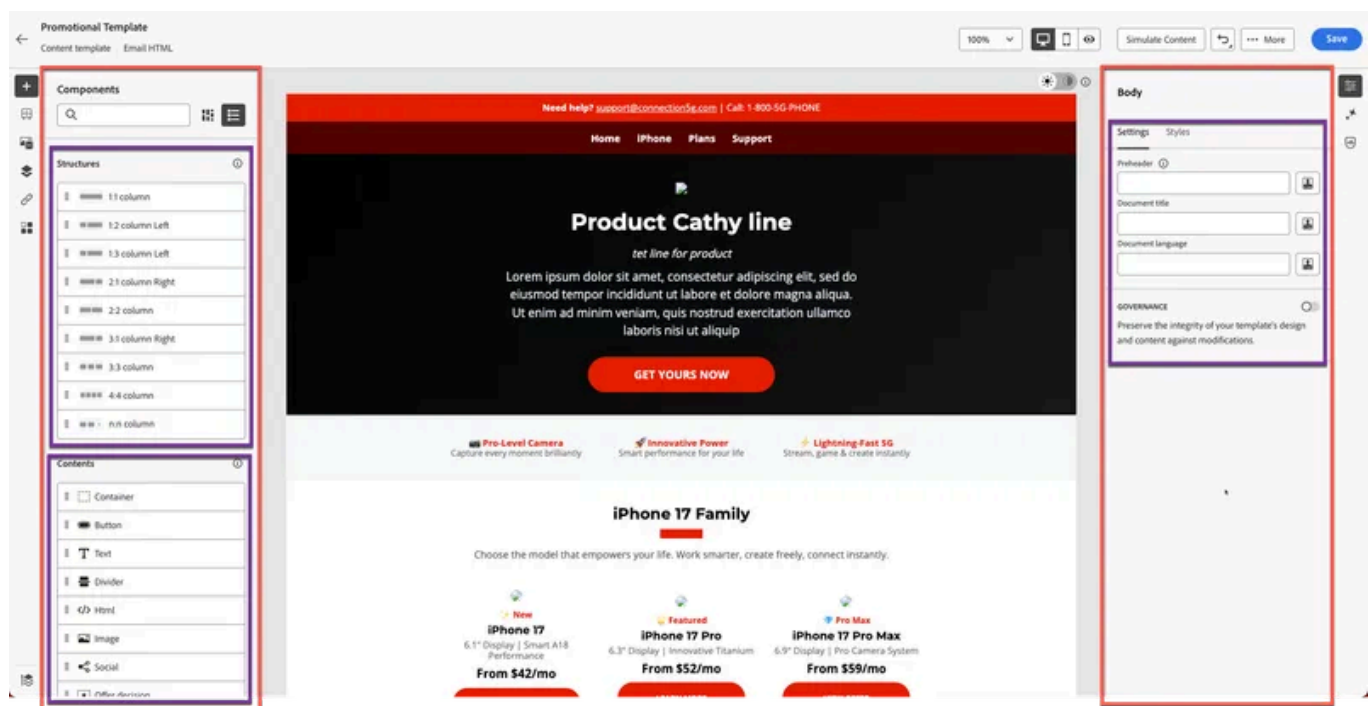
Left Panel

The "**Structures**" and "**Contents**" components in Adobe Journey Optimizer (AJO) are essential elements used when designing emails, landing pages, and content fragments. Structures define the layout framework, while Contents provide the actual building blocks placed inside those layouts.

The body section in Adobe Journey Optimizer is the main container for your email or page content. It serves as the root of the visual design space, where all structure components (columns, layouts) and content components (text, images, buttons, etc.) are nested.

Right Panel

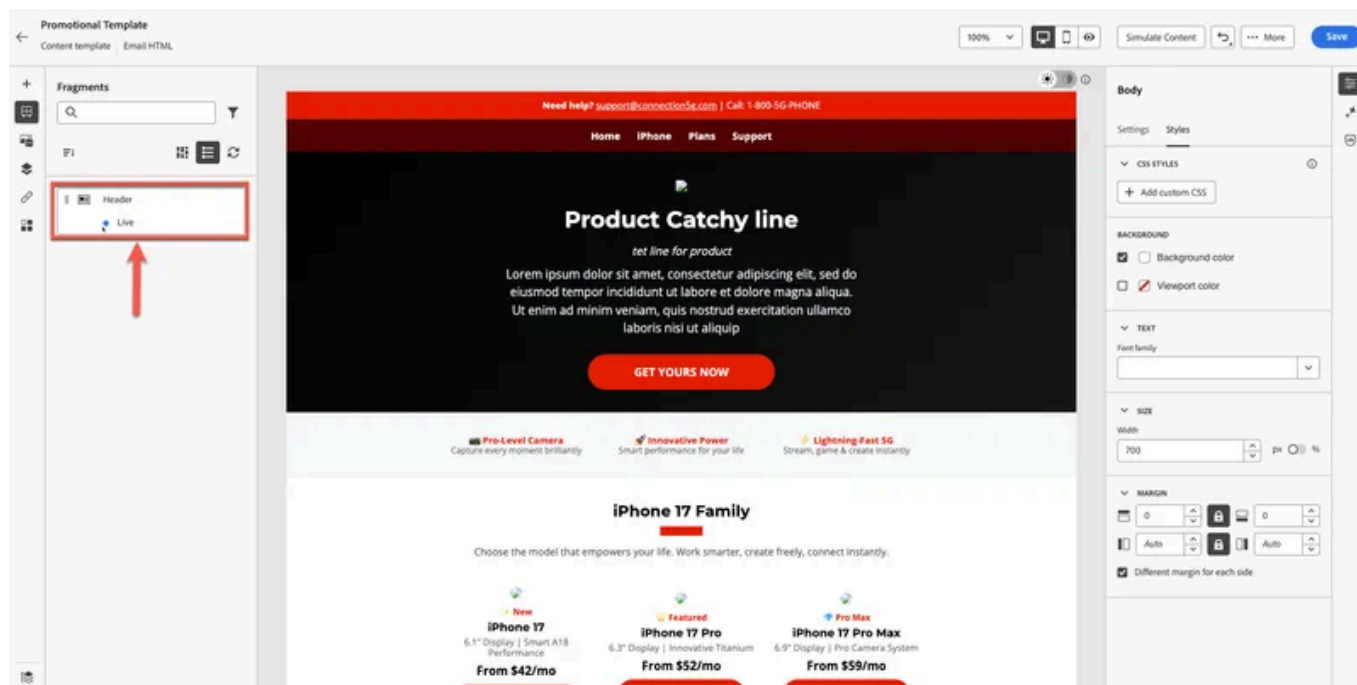
The "**Settings**" and "**Style**" options under the body section in Adobe Journey Optimizer allow you to define the foundational look and layout of your email or page. These controls affect the entire design since the body is the parent of all components.



On your left hand rail bar you will find sections for:

- Fragments
- Files
- Body structure
- Tracked URLs

You should be able to see the header fragment that we created in previous exercise should appear here as shown below. Make sure your header fragment should show they are live with blue dot and not in a draft mode. Spend time checking rest of the sections.

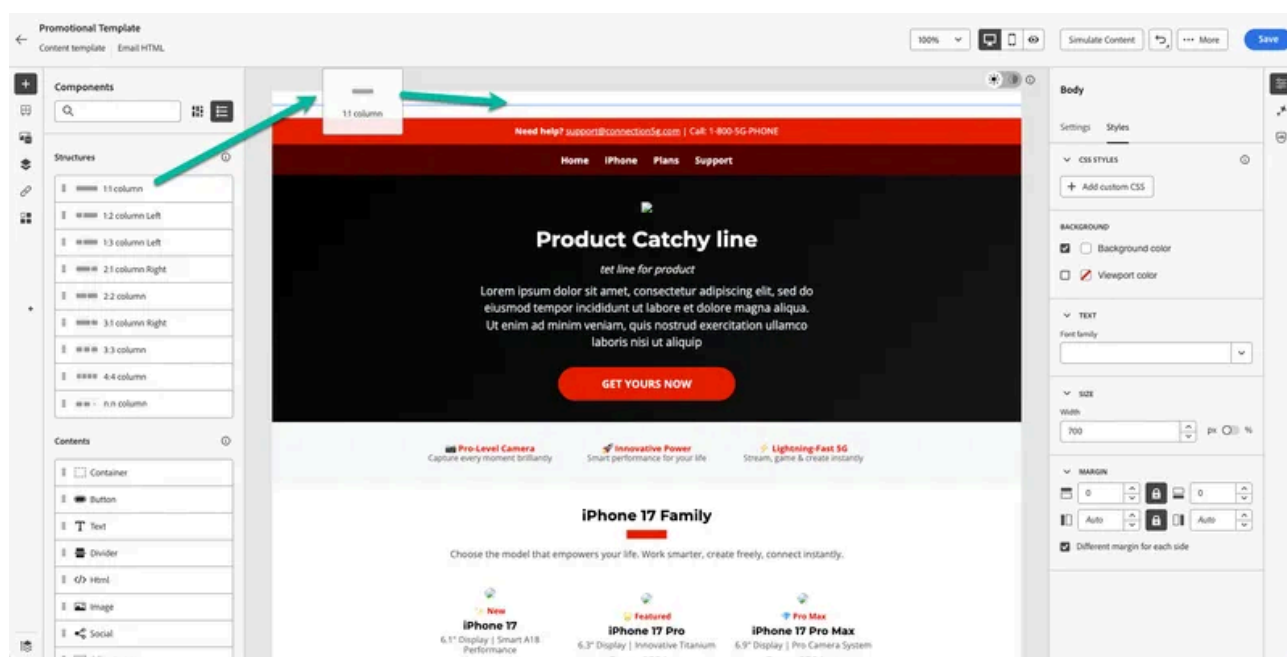


If you do not see your fragment here it means that you did not save it properly and will need to re-upload it.

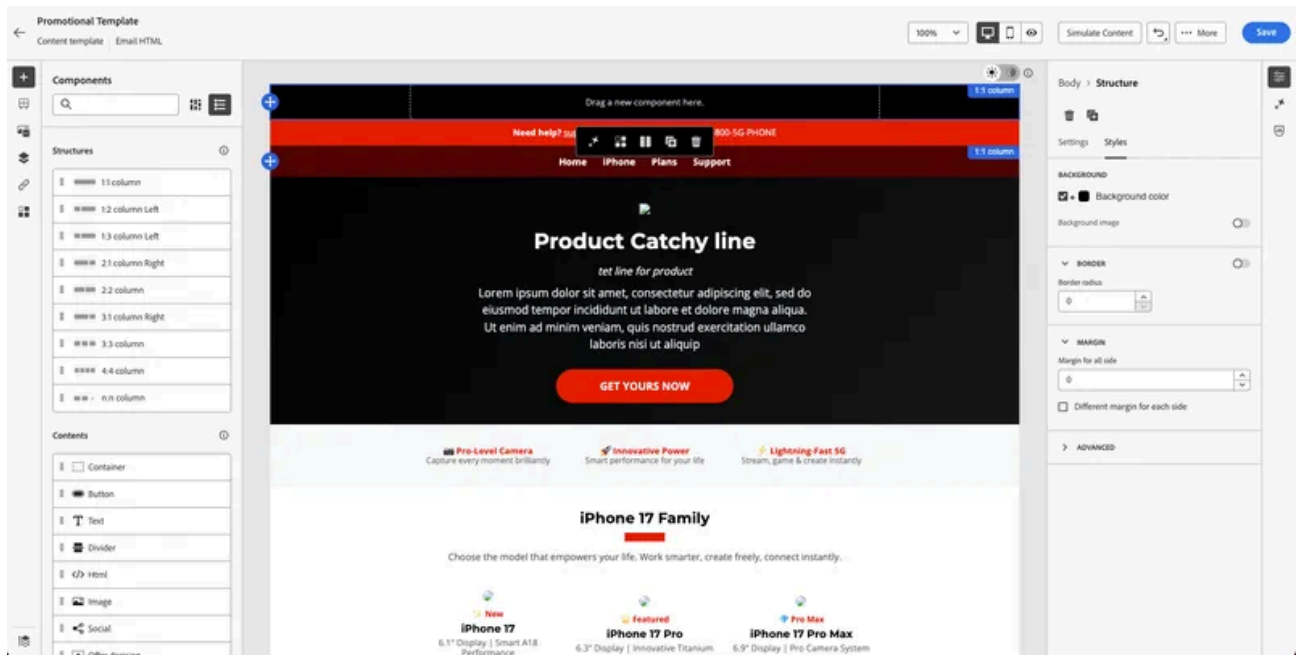
Insert Header Fragments

Let us now improve the template. We have already created header and footer.

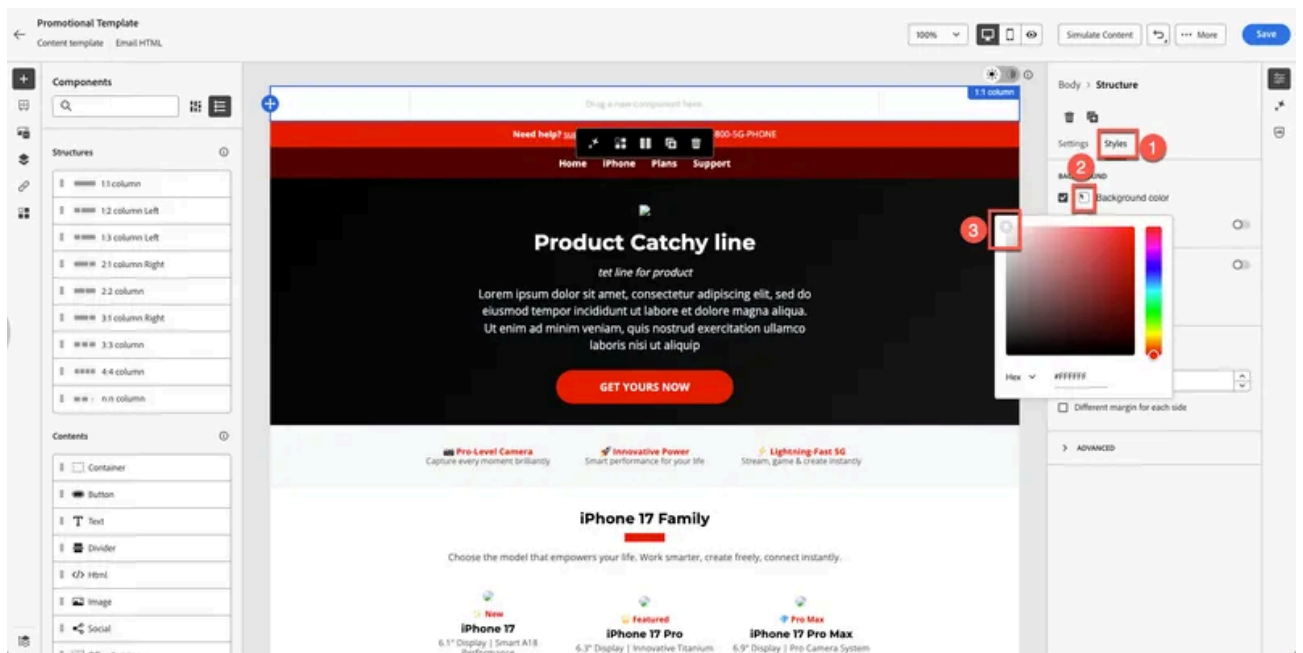
1. Drag a **1:1 Column** above the existing content.



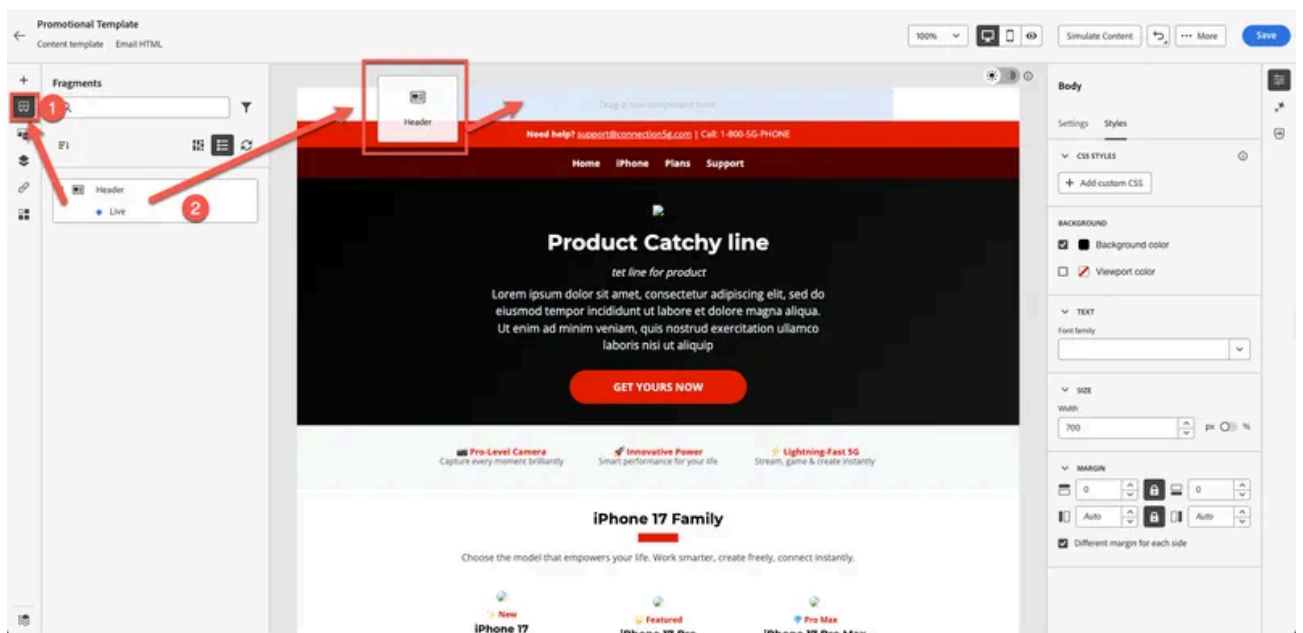
You should see something like this.



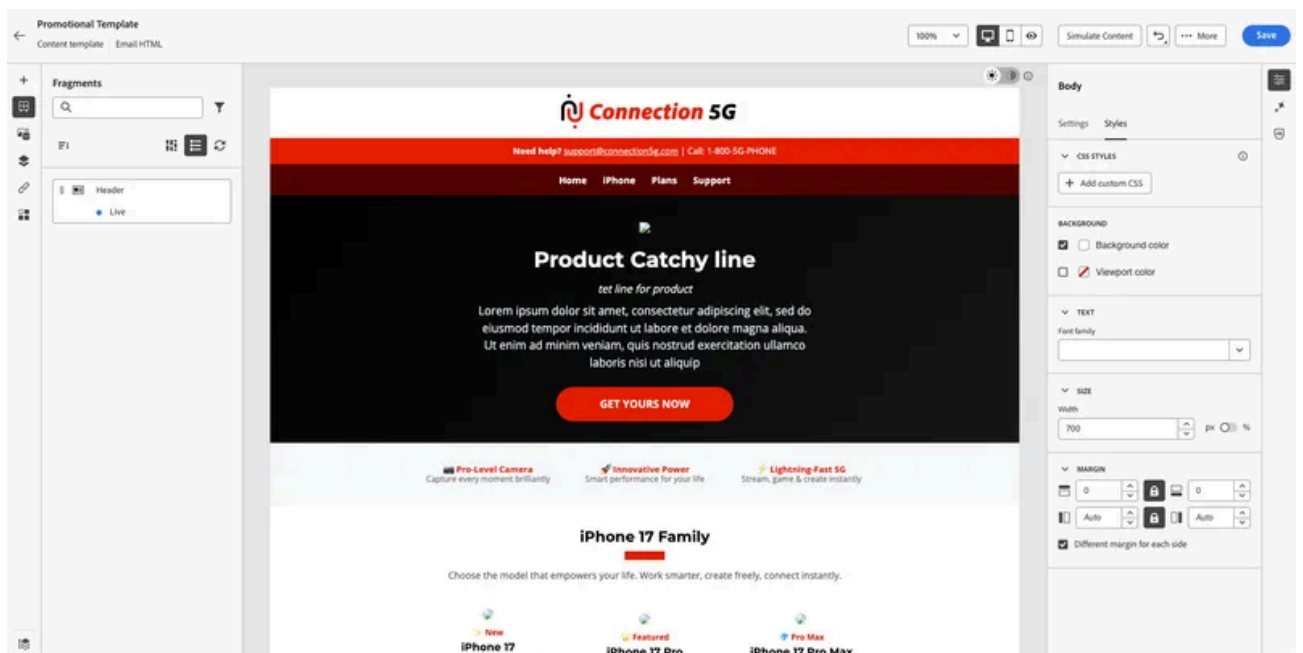
2. Your background will use template background color which is black currently. Set its **background colour to white**. Click in the Style tab on the right rail and use white colour from the colour picker.



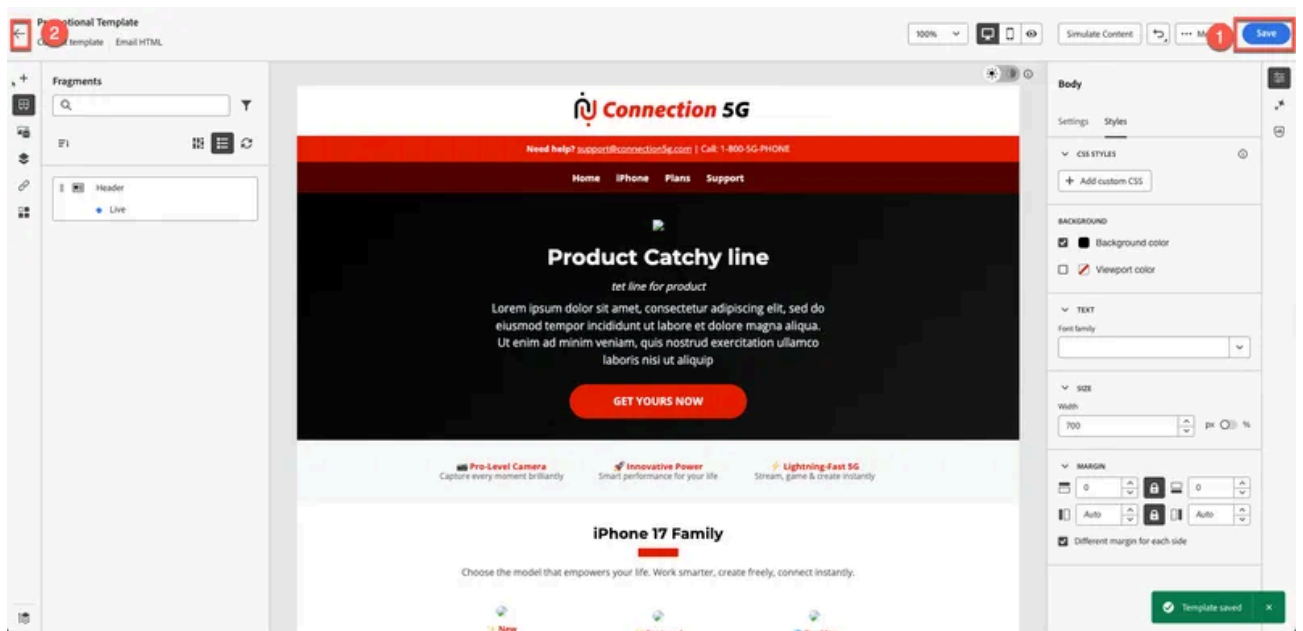
3. Open **Fragments** and drag in your **Header** fragment.



4. Notice that the header fragment is neatly aligned to your template as shown below.



5. Click the **Save** button to save your template and then click **Back**.



Note that you may see some broken images. We will fix that later.

Recap

In this module, you successfully:

- Imported HTML to build a full promotional template

You are now ready to move on to next module - **Email Creation**

7.5. Creating the Email

Content creation with Templates

Purpose: Learn how to create reusable templates in Adobe Journey Optimizer, then apply them inside a real email within a campaign.

Learning Objectives

By the end of this module, you will be able to:

1. Create a new campaign and use your new branded template.
2. Update hero images, product images, buttons, and layout styling.

Create and Update the Email in a Campaign

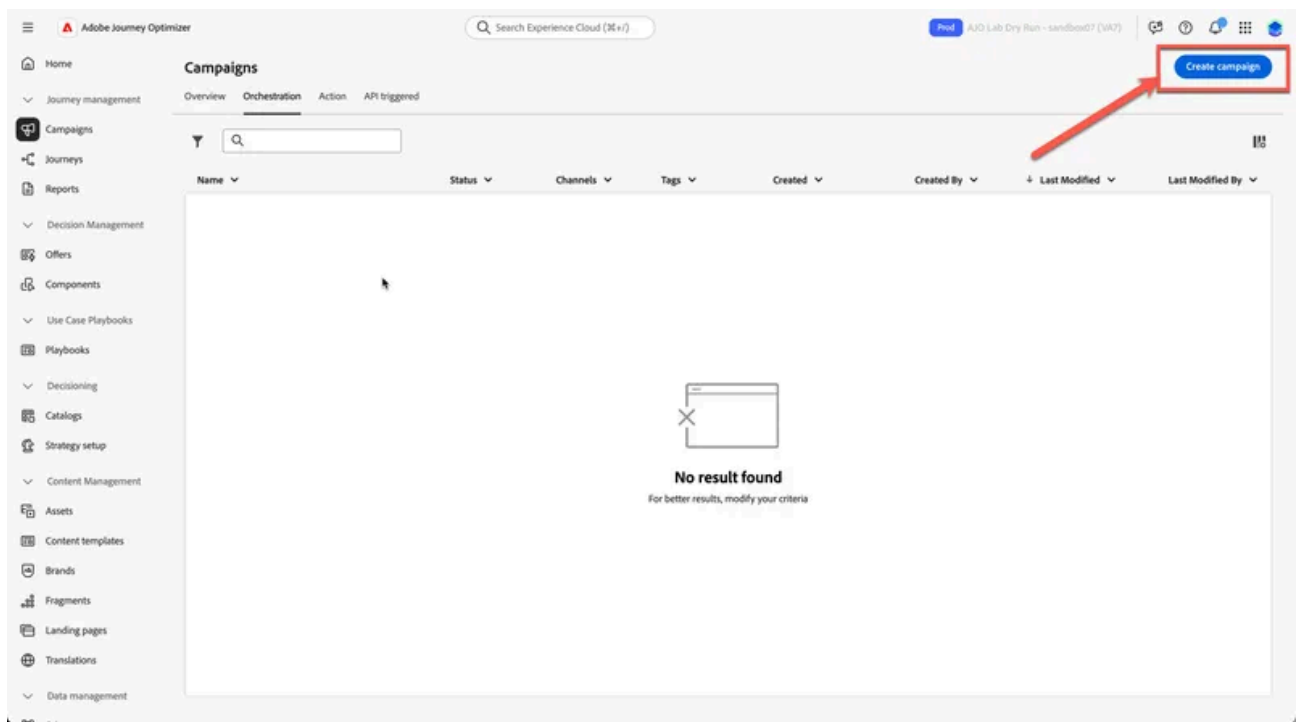
Objective

In this exercise, we will learn how to apply the template you created to an email within a journey. In an ideal scenario, you can use any existing journey or campaign and replace its email content with a standardized template to ensure brand consistency and faster execution.

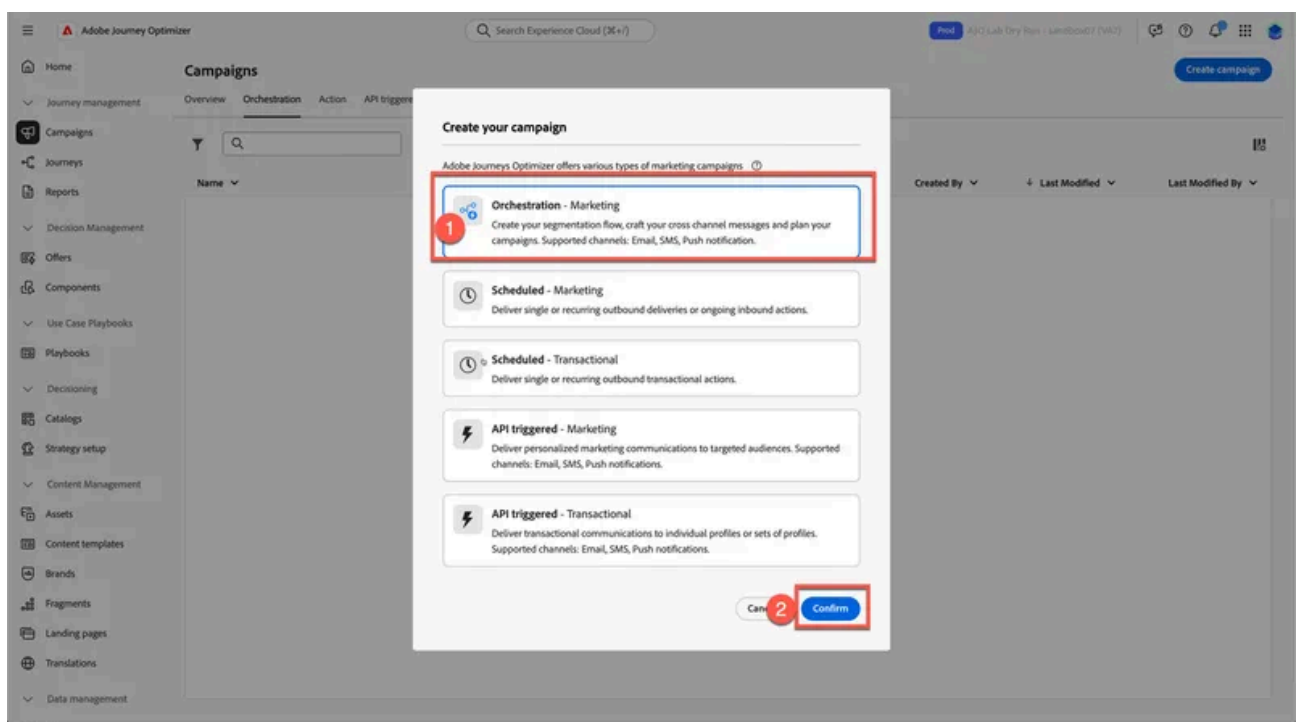
This step demonstrates how templates can be reused across journeys, allowing teams to update designs without rebuilding emails from scratch.

Create new email campaign

1. Go back to the main screen and click on **Journeys Management → Campaigns**.
2. Click on **Create Campaign**



3. Select "**Orchestration - Marketing**" and click **confirm**



4. Name your campaign . Press **Save** button.

Campaign settings

Name * 1

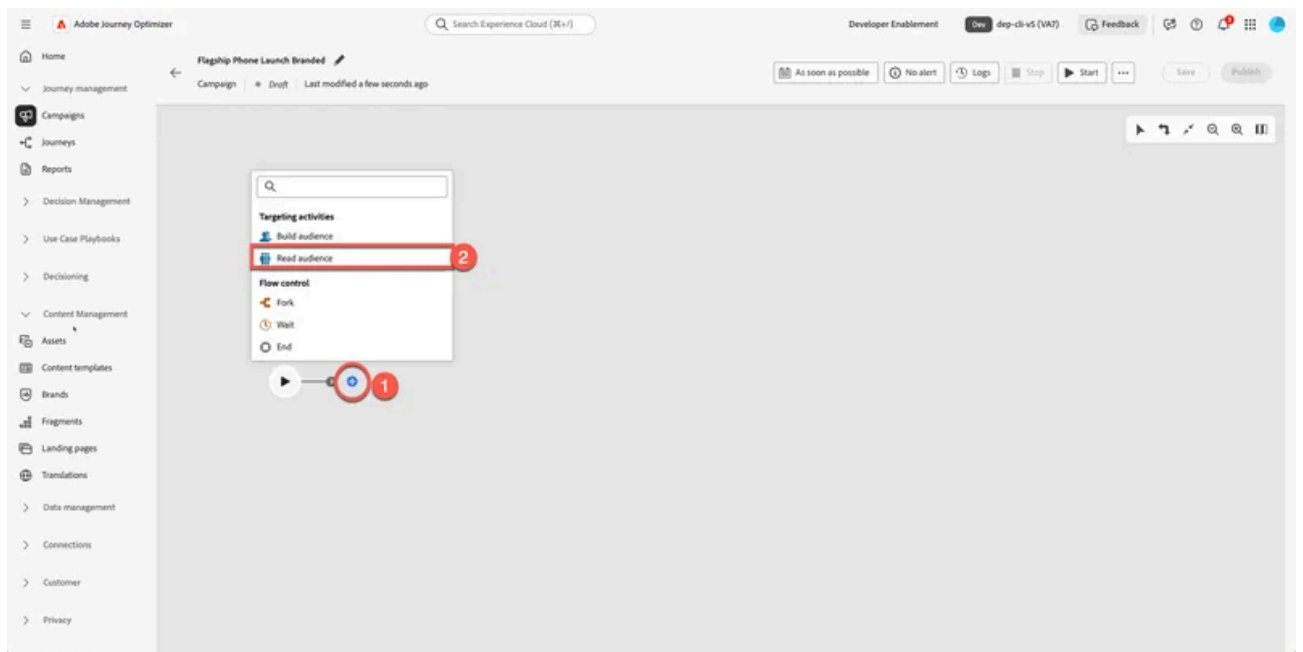
Description

Merge policy ▼

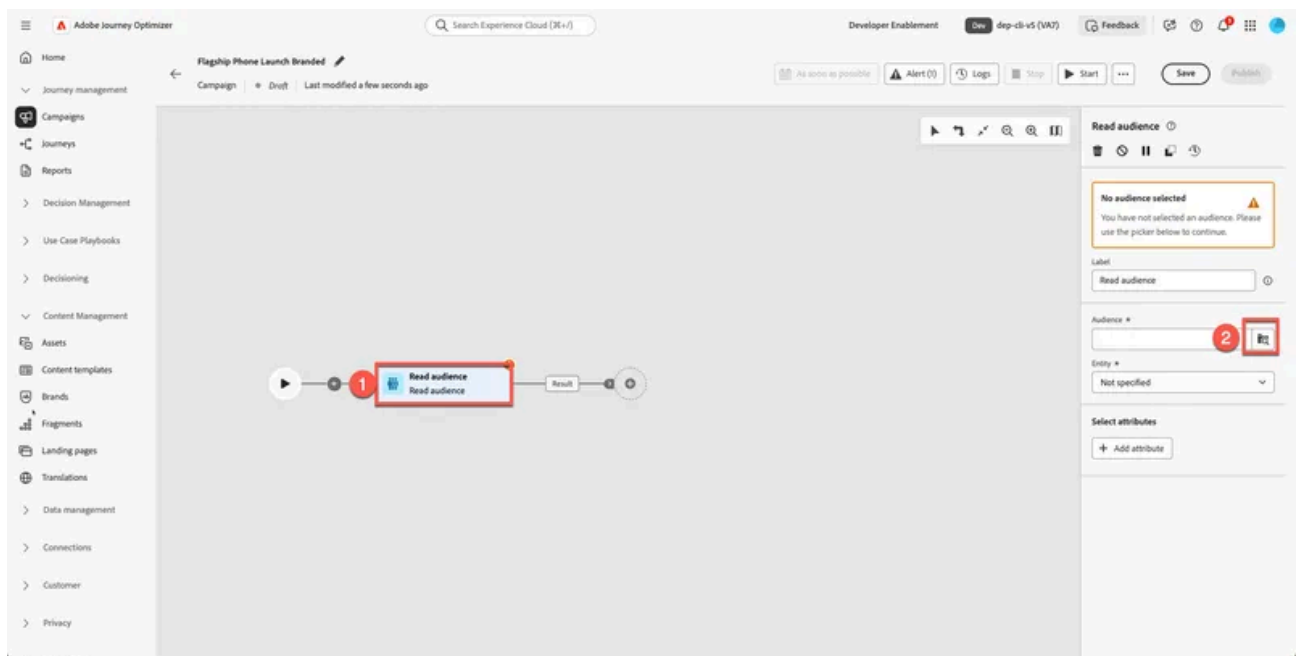
Tags ▼

Cancel 2 Save

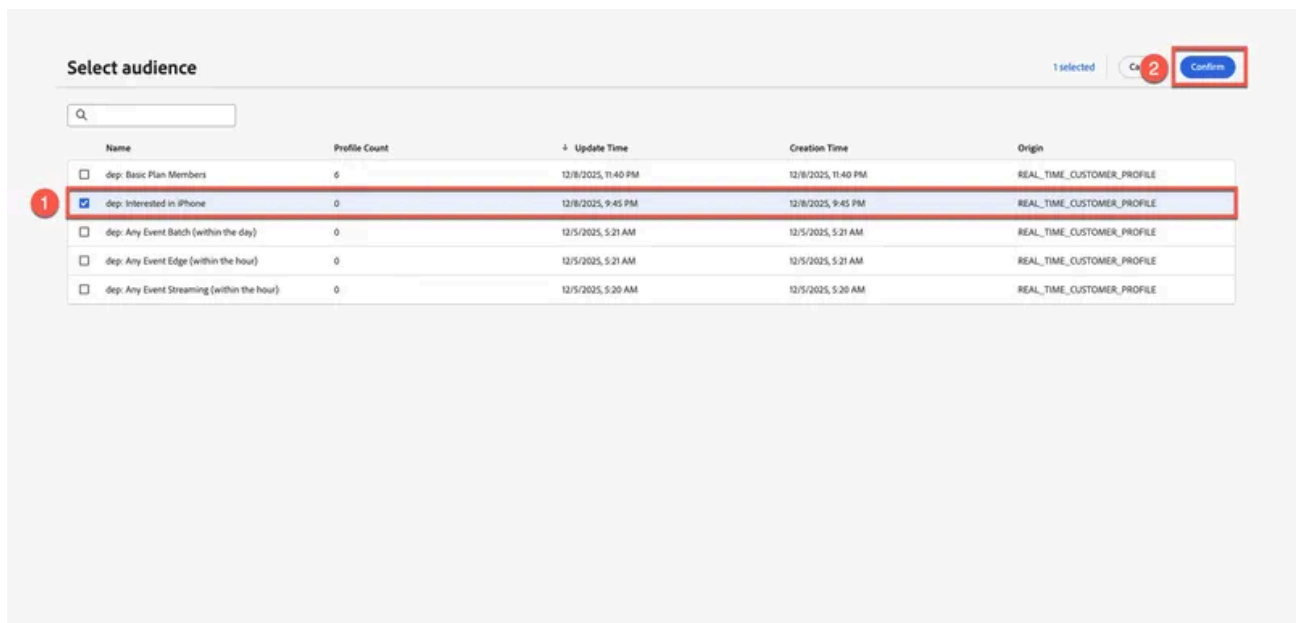
5. Click on the **+** sign and select **Read Audience** activity



6. The next step is to select **"Read Audience"** box and click on **Audience folder icon**

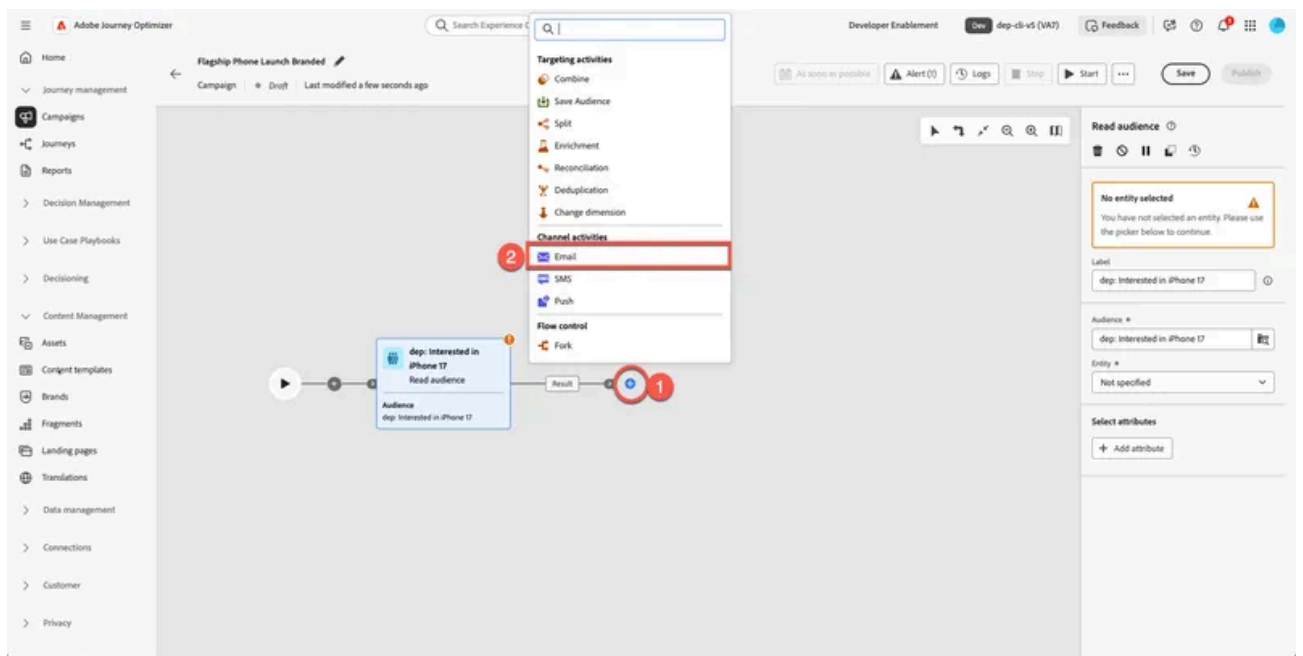


7. Select the **dep: Interested in iPhone 17** audience and click "**Add Audience**" button

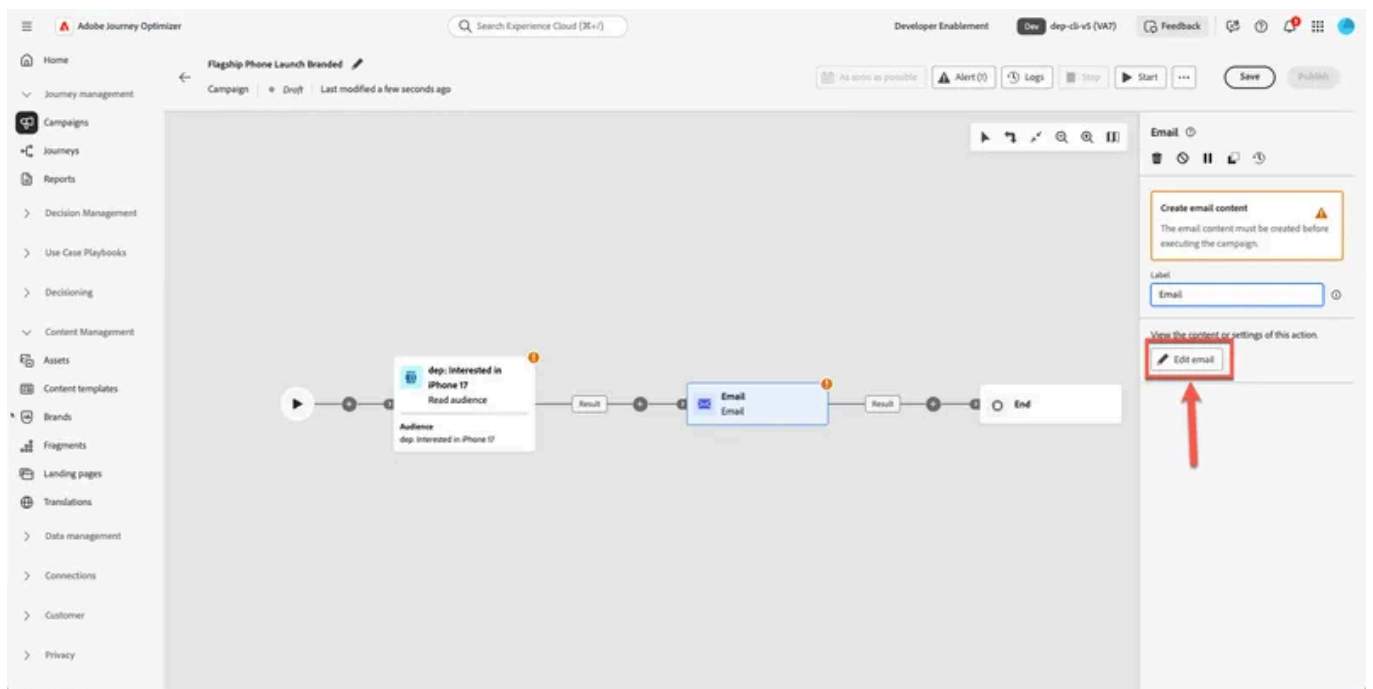


8. Select Entity - **dep-rel: Customer Account - customer_id** (or any as it does not matter for this part)

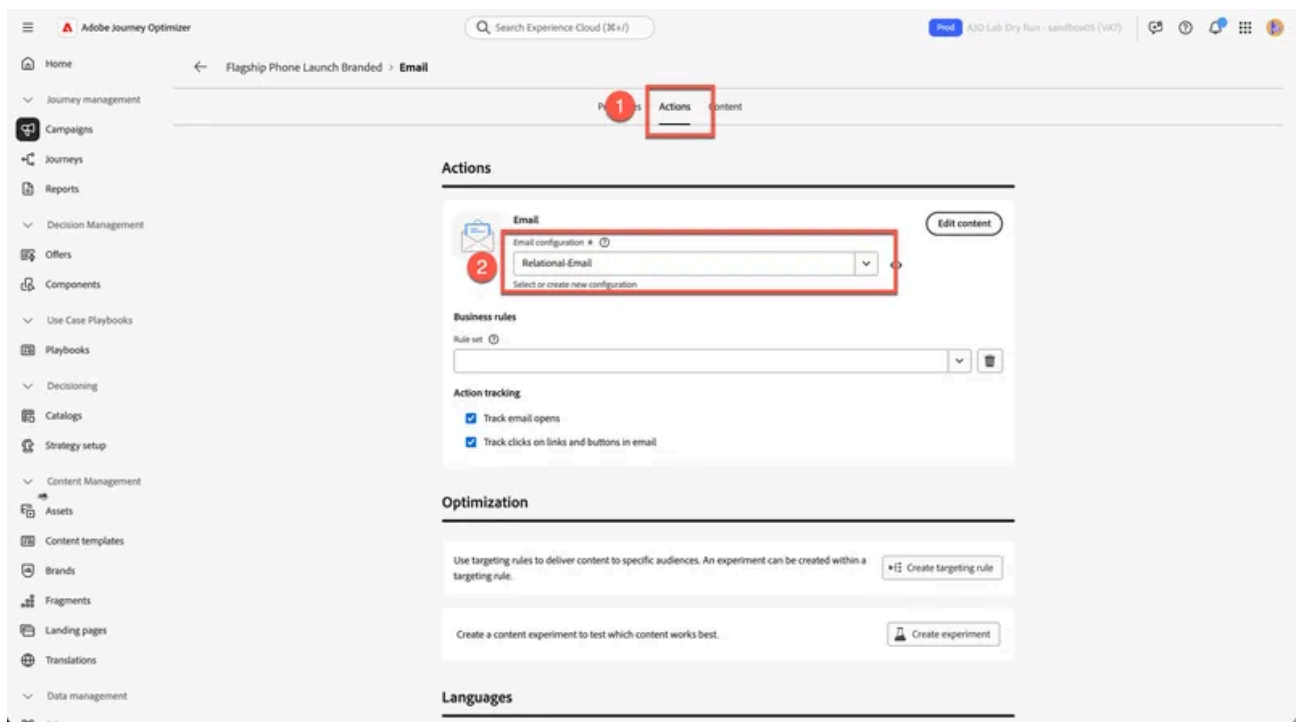
9. Add the **Email activity** by clicking **+ sign** and then select **Email** from Channel activities.



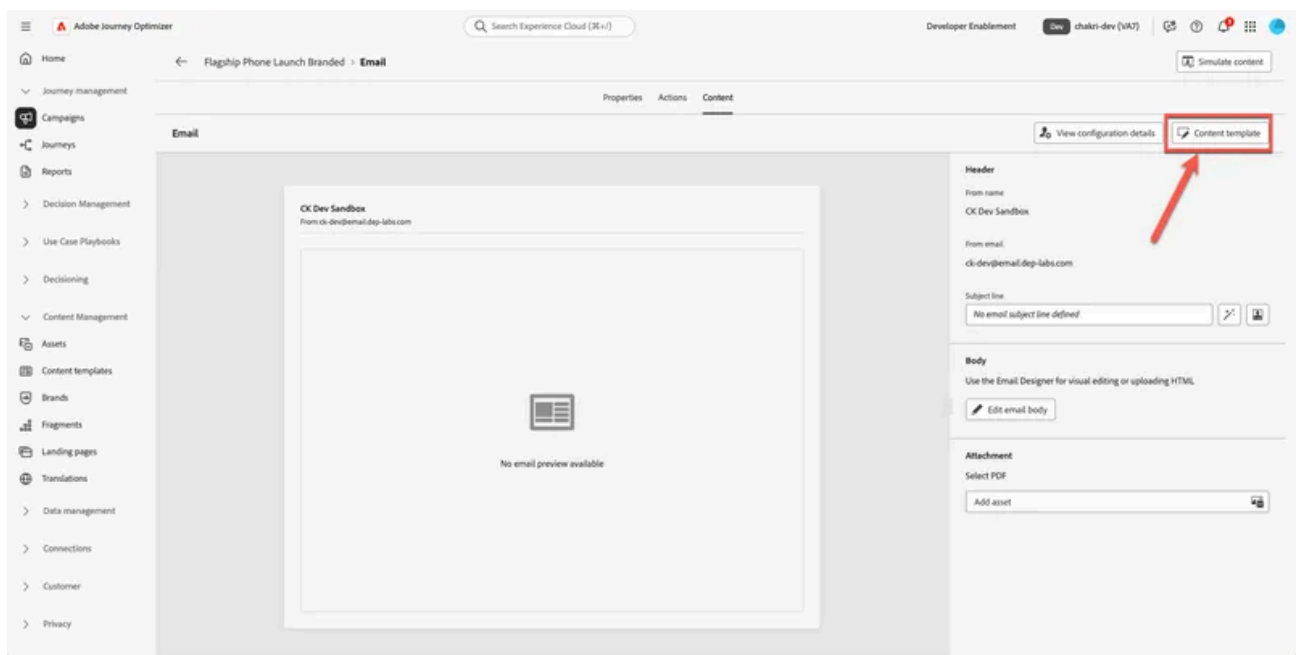
9. Click on **Edit email**.



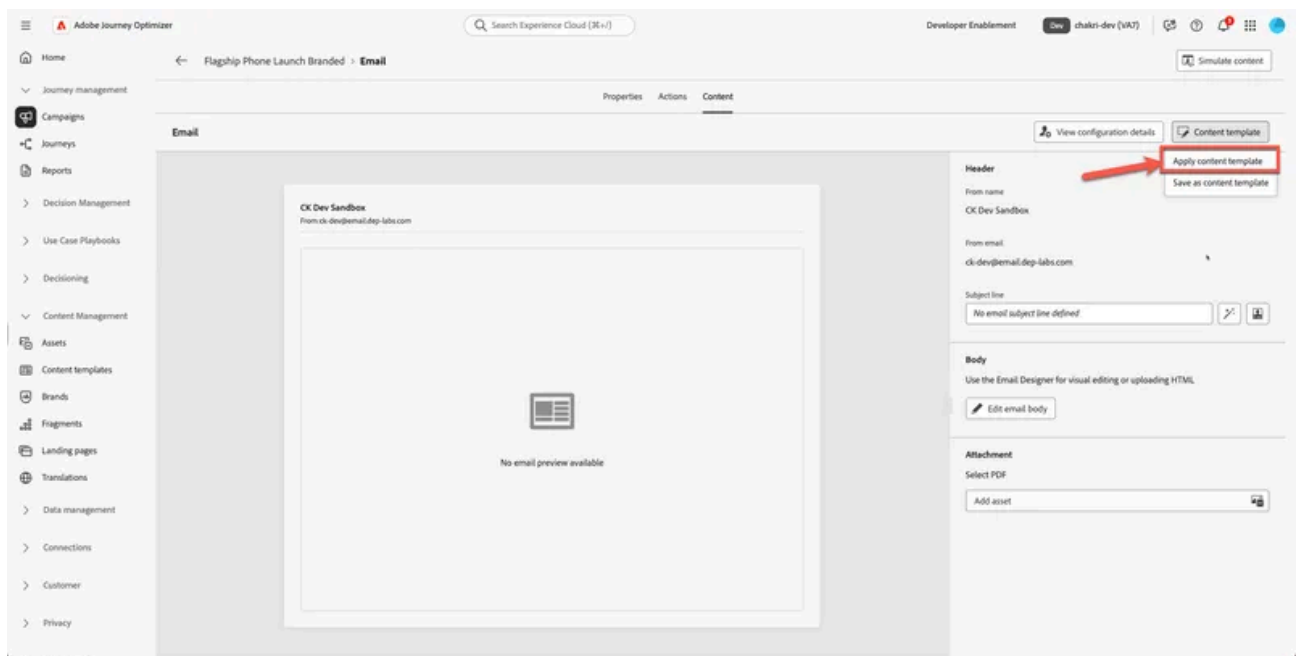
10. Click on the **Action tab** and select the **your** email configuration. In my sandbox it is Relational Email. (Select Any)



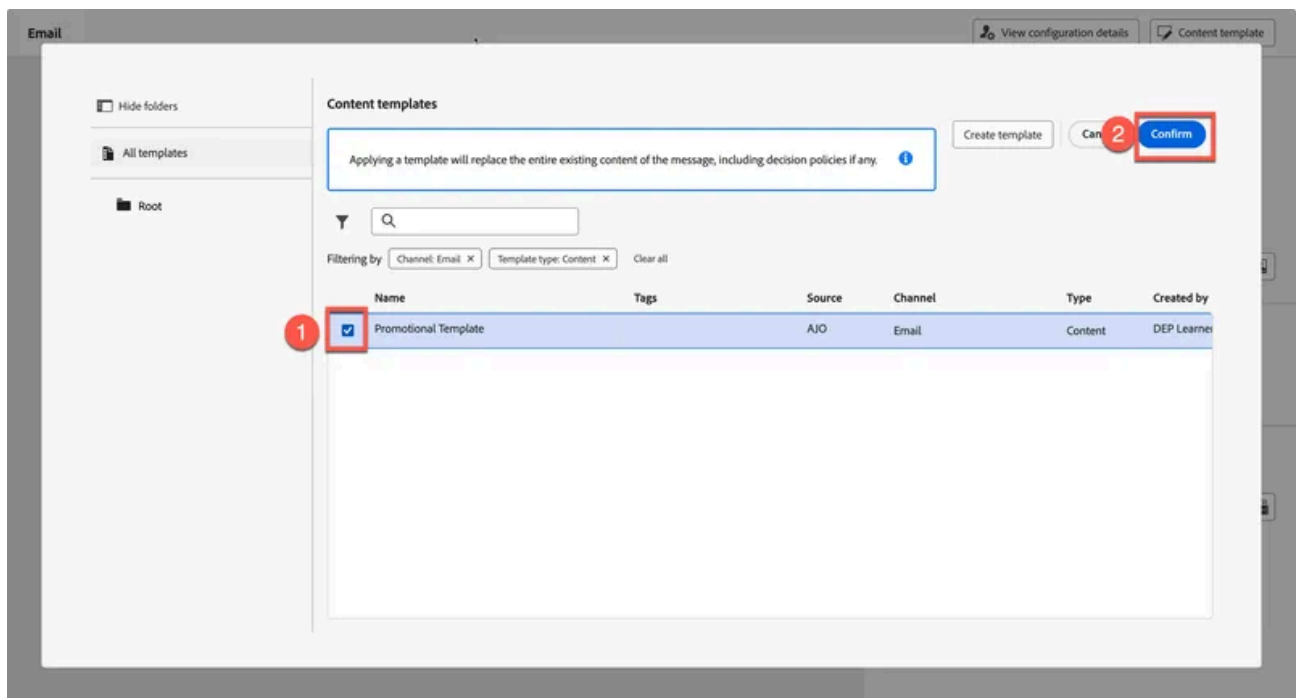
11. Click on **Content** tab



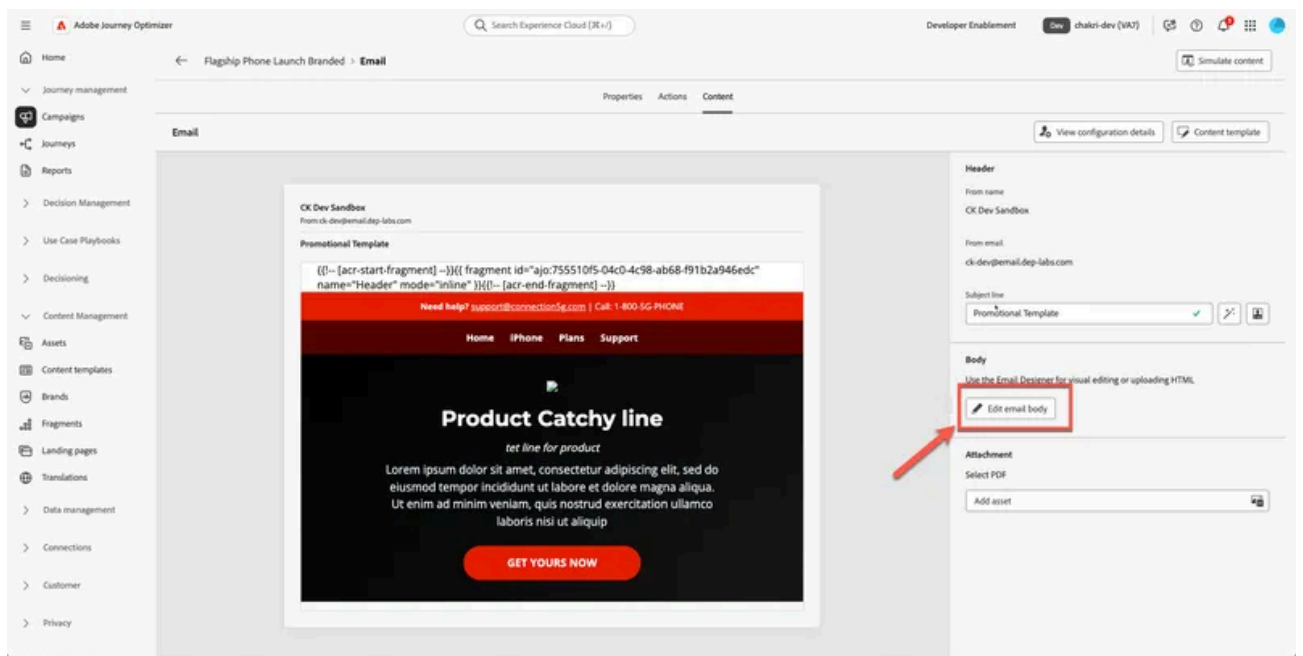
12. Click on **Apply Content Template**



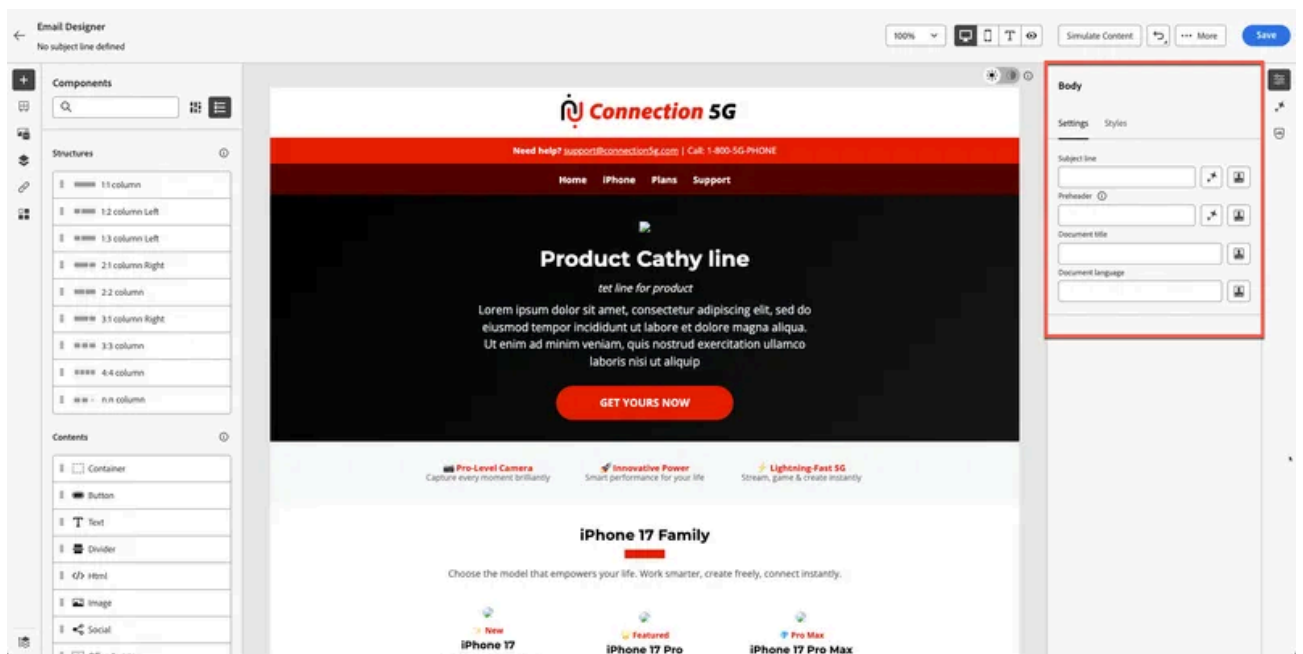
13. Select the template "**Promotional Template**" you created and click **Confirm**



10. Click on **Edit email body**



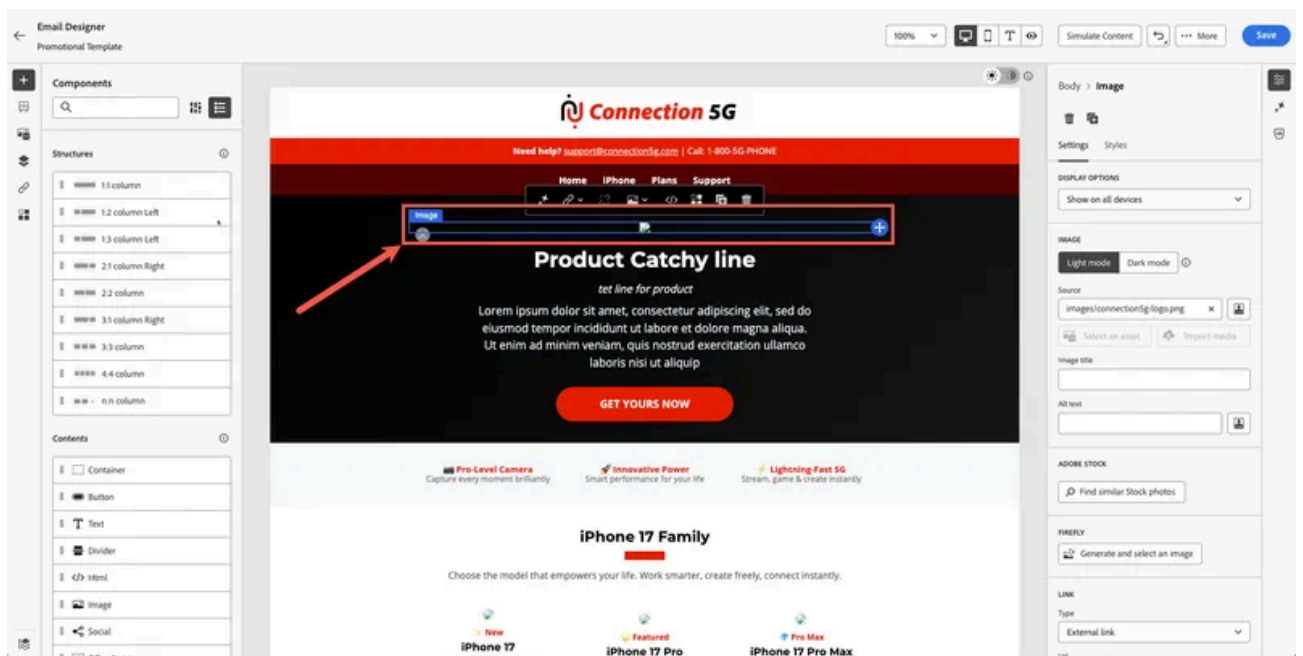
11. Confirm the new header, hero, footer, and content blocks appear correctly.



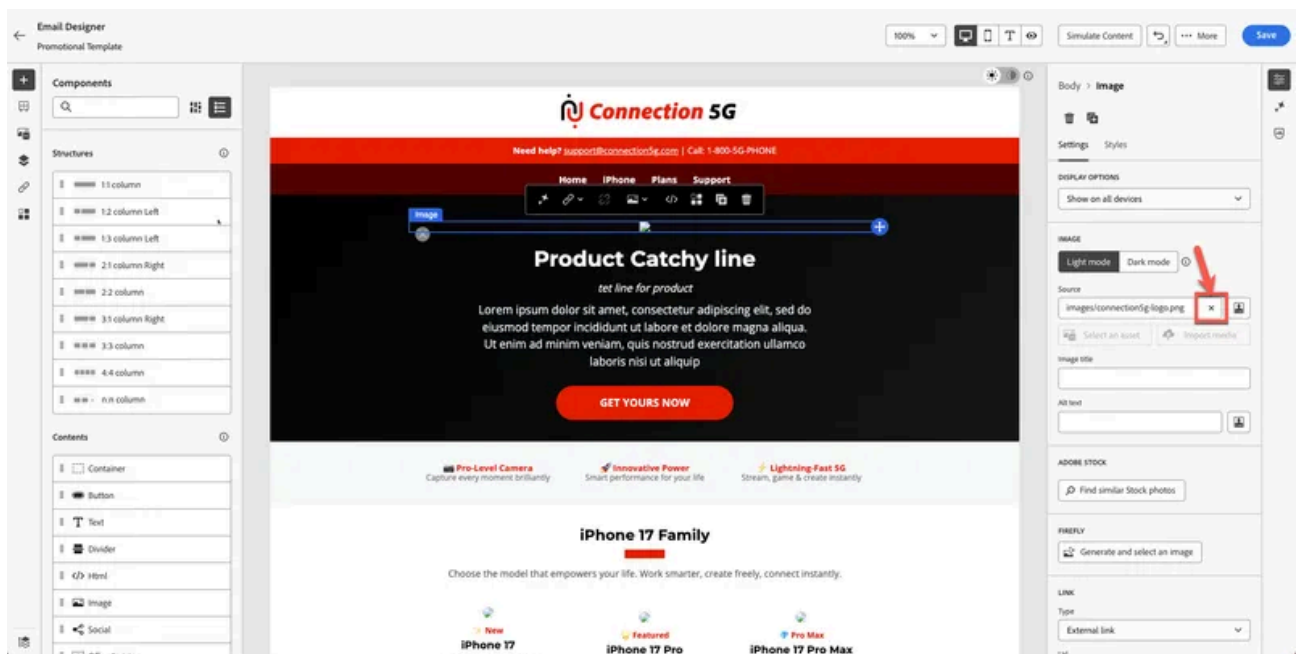
Replace Hero Image & Product Images

Let us change hero and phone images. You will need to upload content to assets from the toolkit folder. Currently your product hero banner image is a placeholder.

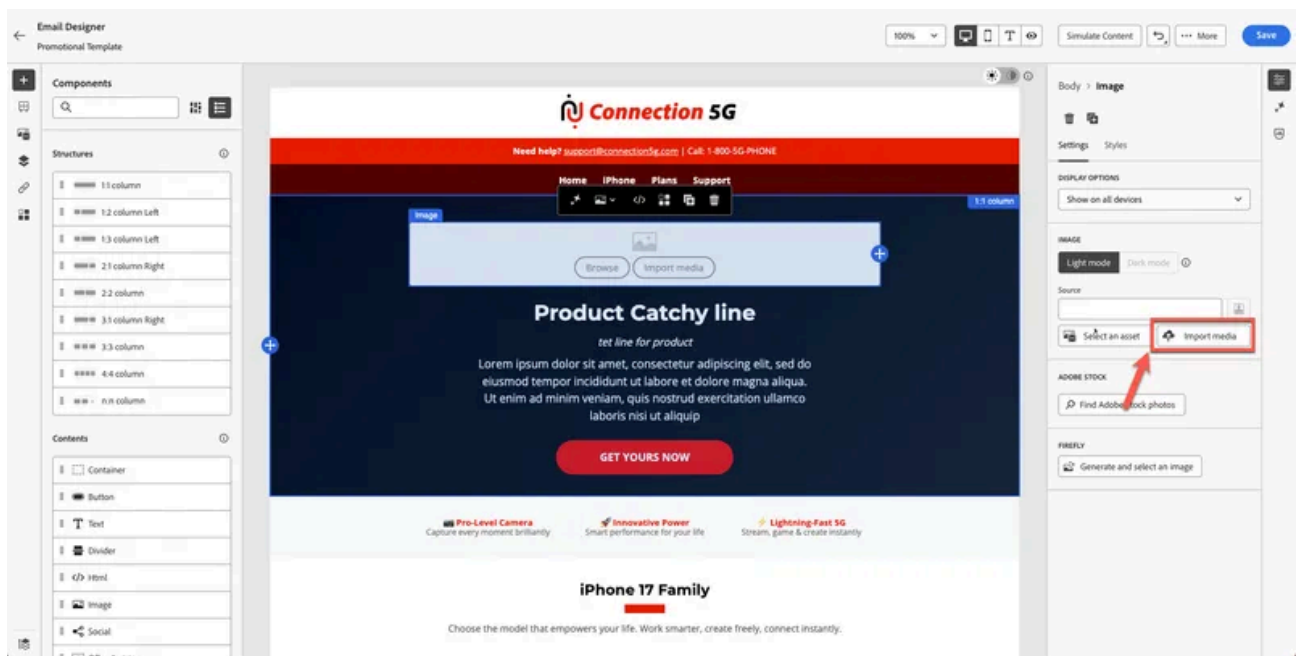
1. Click the broken hero banner image.



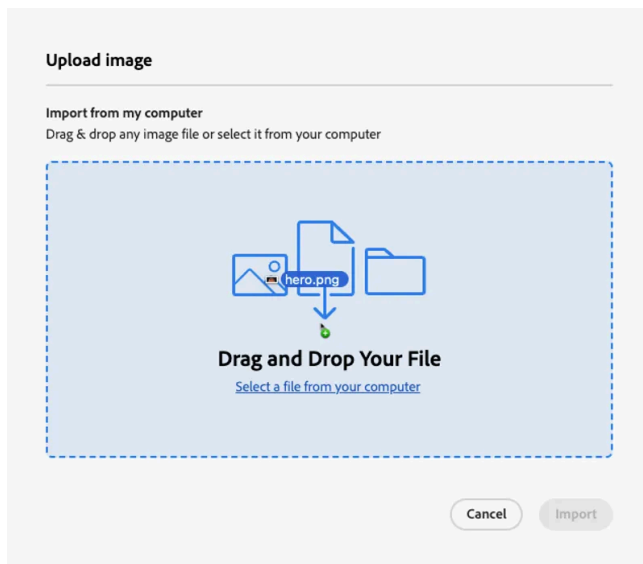
2. Remove the temporary source URL.



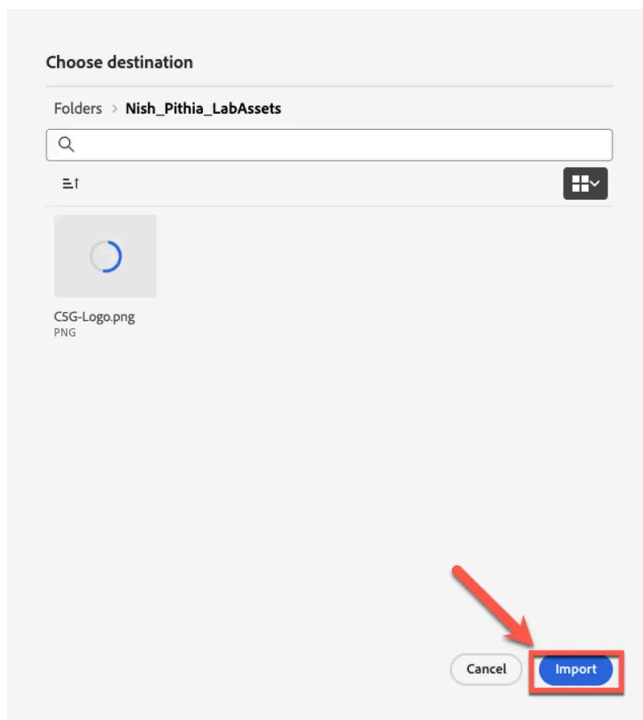
3. Click on **Import Media**



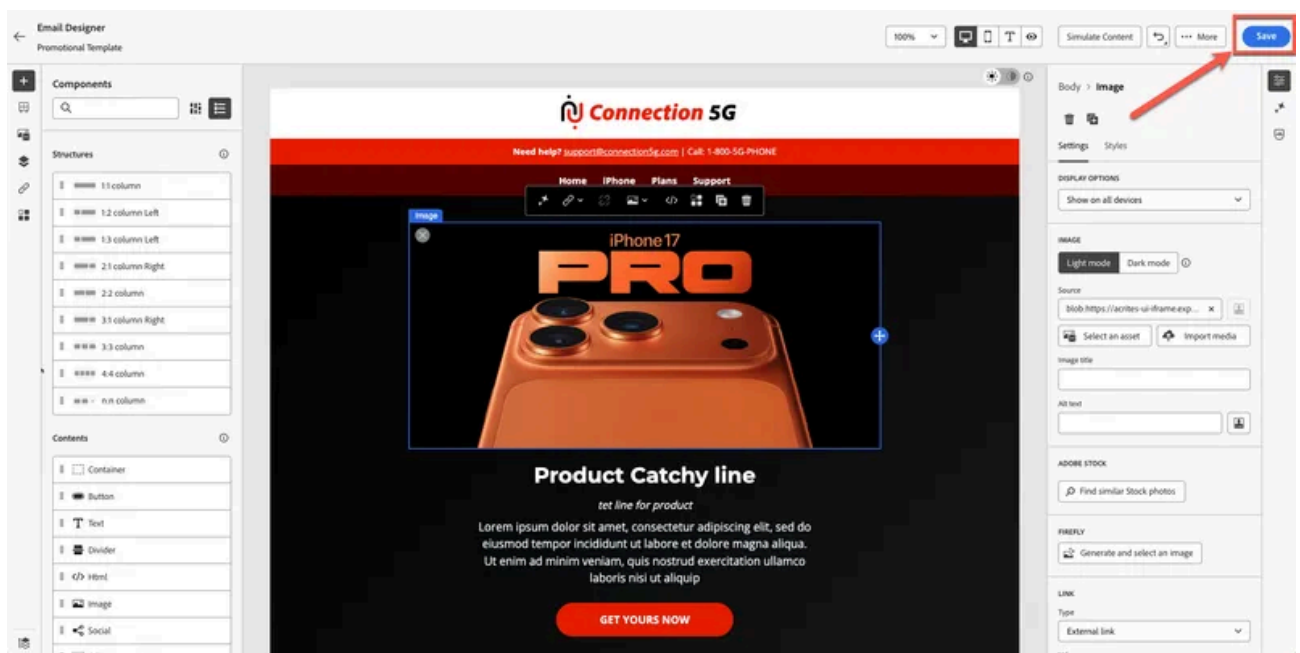
4. Upload `hero.png` from your toolkit. (You can drag the file)



5 Click **Next**, Select **your folder for assets** and press **import**



6. Your email template is coming up nicely. It should appear like below. Click on **"Save"** to save your work.



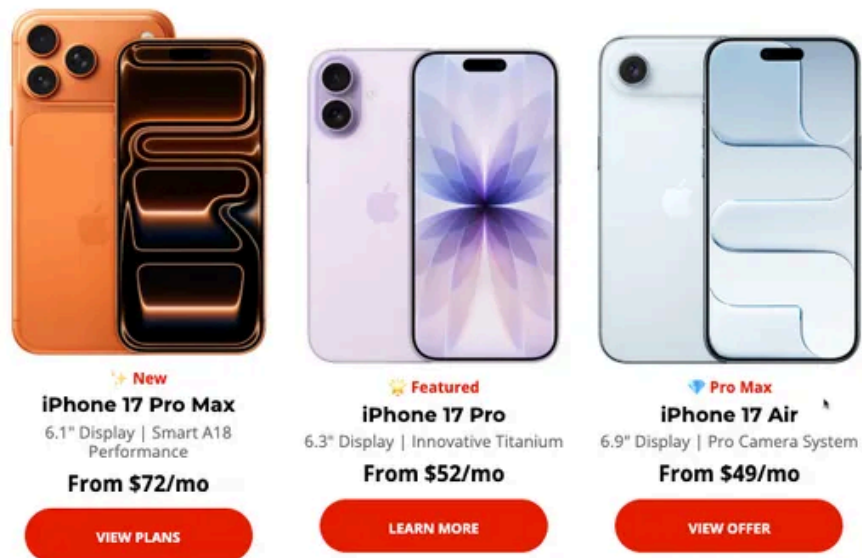
Optional Exercise

Replace Product Images

Go ahead and update all the product images (images provided in the toolkit folder) and also add rounded border to your liking. Your email should look nicer without any broken links as

shown below. Repeat the process for all product cards.

3:3 column



Recap

In this module, you successfully:

- Created a new campaign with email using your branded template
- Updated hero and product images
- Enhanced styling

You are now ready to move on to next module - **AI Assistant & Content Personalisation**, where you will use AI to refine text and generate images automatically.

7.6. AI Assistant & Content Personalization

Purpose: Learn how to use Adobe Journey Optimizer's AI Assistant to generate subject lines, refine email text, adjust tone, and create on-brand Firefly images directly inside the email designer.

Learning Objectives

By the end of this module, you will be able to:

1. Use the AI Assistant to generate subject lines and pre-headers.
2. Refine hero text, descriptions, tone, and messaging.
3. Apply AI-driven rephrasing, summarisation, and tone adjustments.
4. Generate images using Adobe Firefly with reference style and brand settings.
5. Replace placeholders with generated images inside your email design.

Introduction

The AI Assistant in AJO helps you build smarter, on-brand content.

It can:

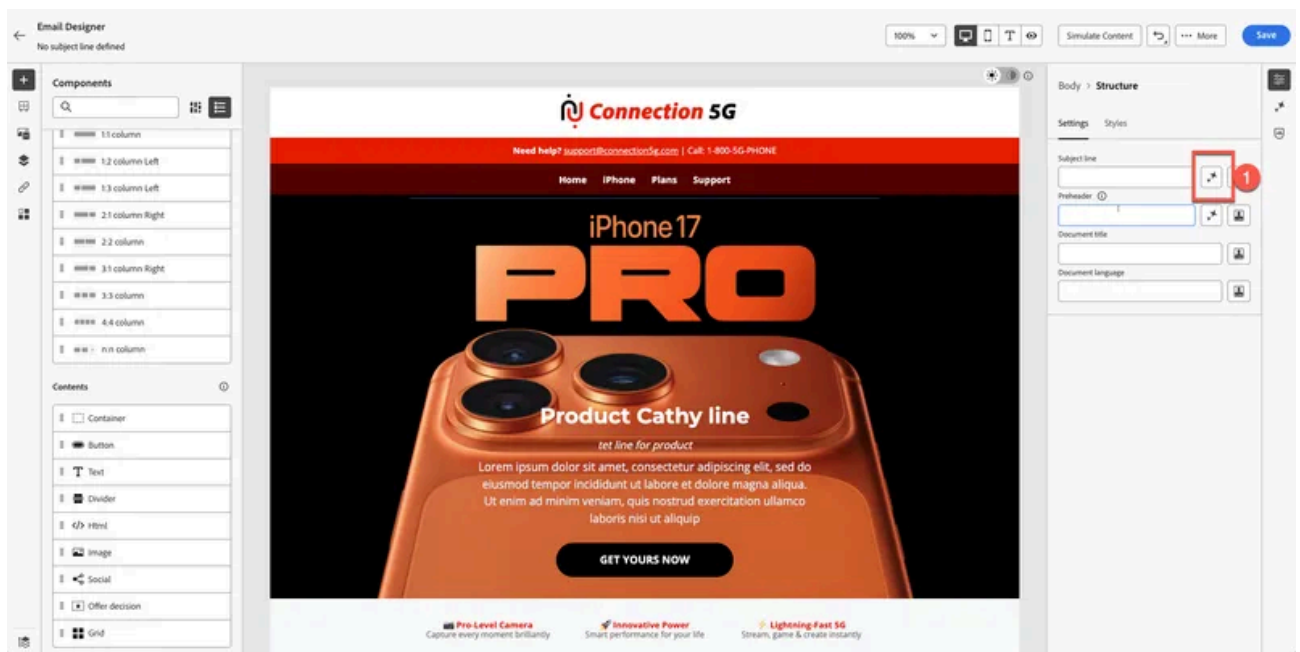
- Generate subject lines
- Improve existing text
- Adjust tone and clarity
- Create branded images using Firefly
- Ensure everything aligns with Connection 5G guidelines

For this exercise, we will improve the email that we have created using the AI Assistant.

Note: The AI Assistant is **non-deterministic**, which means it may generate slightly different content each time it is used. What you see during your practice may not exactly match the screenshots or examples in this guide. That's okay—focus on learning the process and concepts rather than expecting identical results.

Create Email Subject Line Using AI Assistant

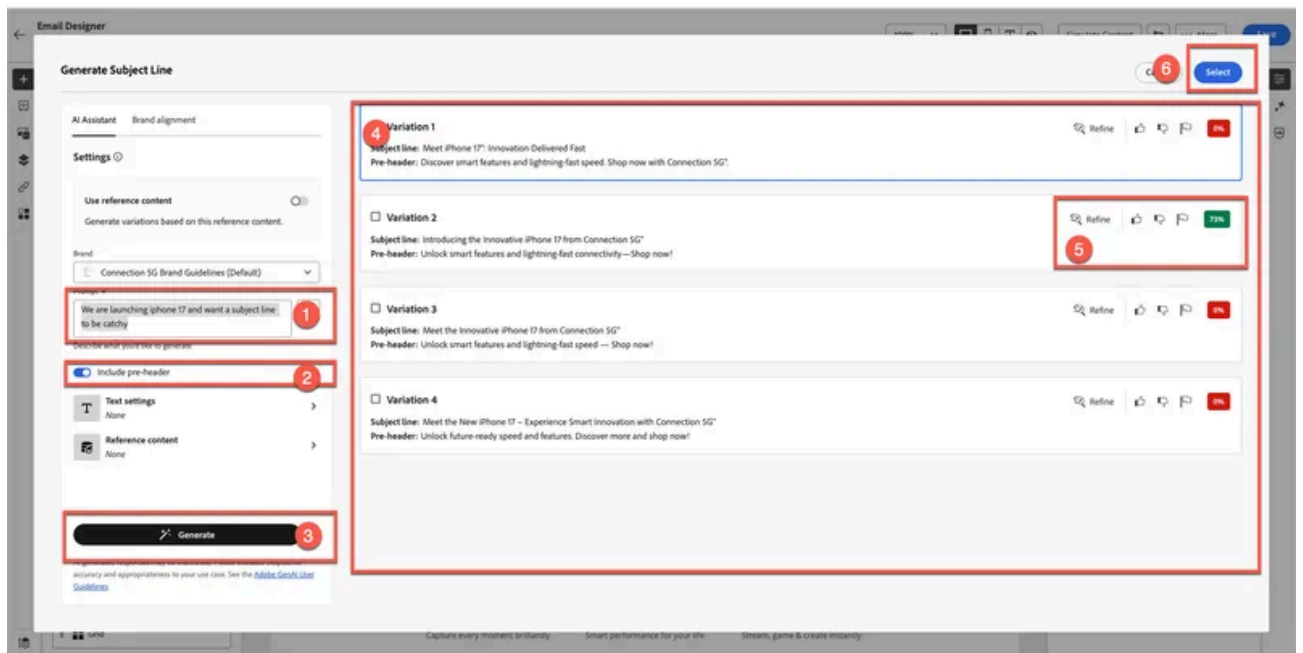
1. Go back to the Campaign by clicking the back button or edit the email you created in the previous module. (from previous step, you can click on settings tab on right hand side)
2. Click on Email Container > Click on Edit Email button.
3. Click on the content tab, and then click on Email body
4. Select the **Subject Line** field.
5. Click the **AI Assistant icon**. (see below)



4. You will notice that Brand Guideline is selected by default.
5. Enter the prompt:

We are launching iPhone 17 and want a subject line to be catchy

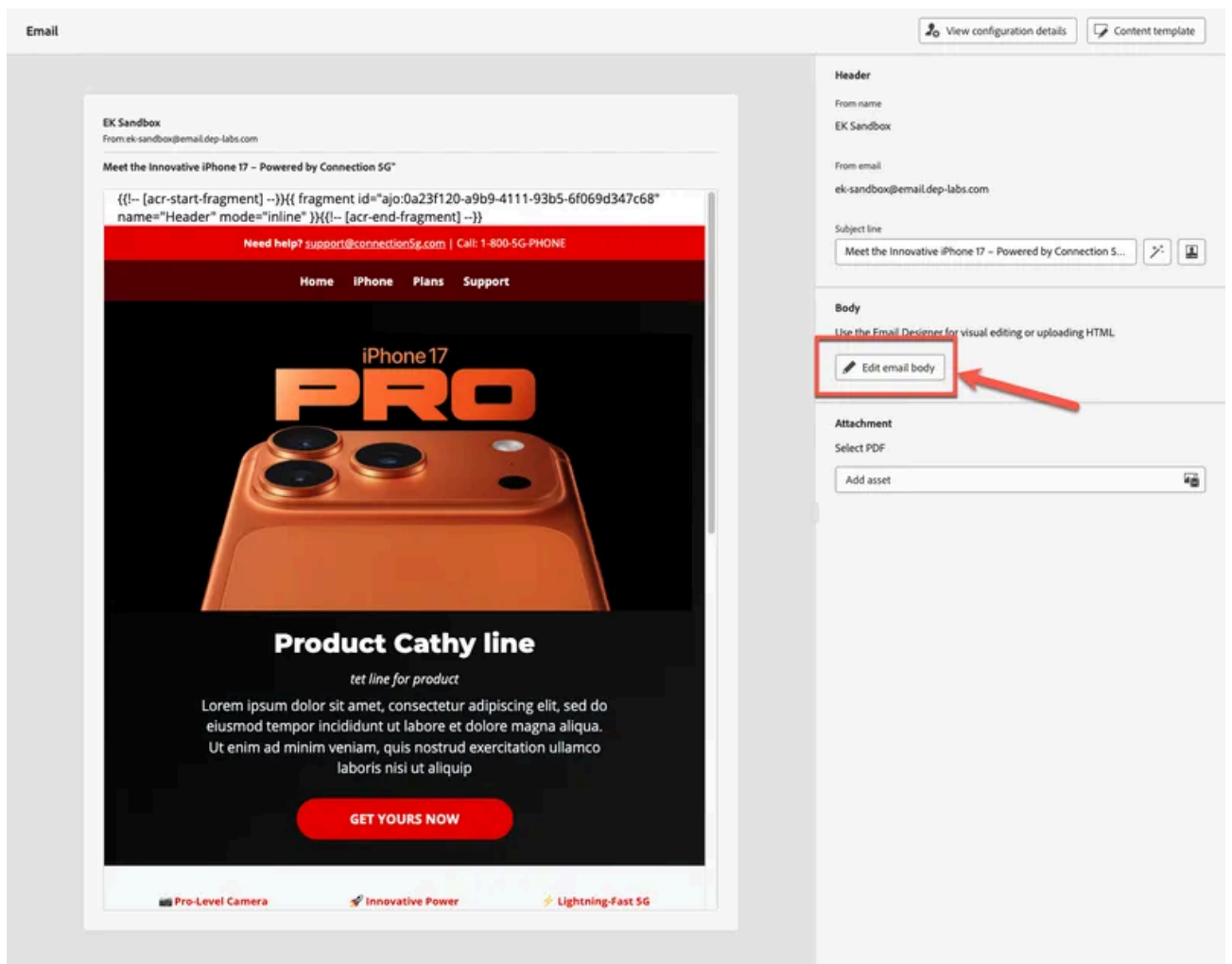
1. Press **Generate**.
2. Review the four variants generated.
3. Choose the variant with the best alignment score and click **Select**.



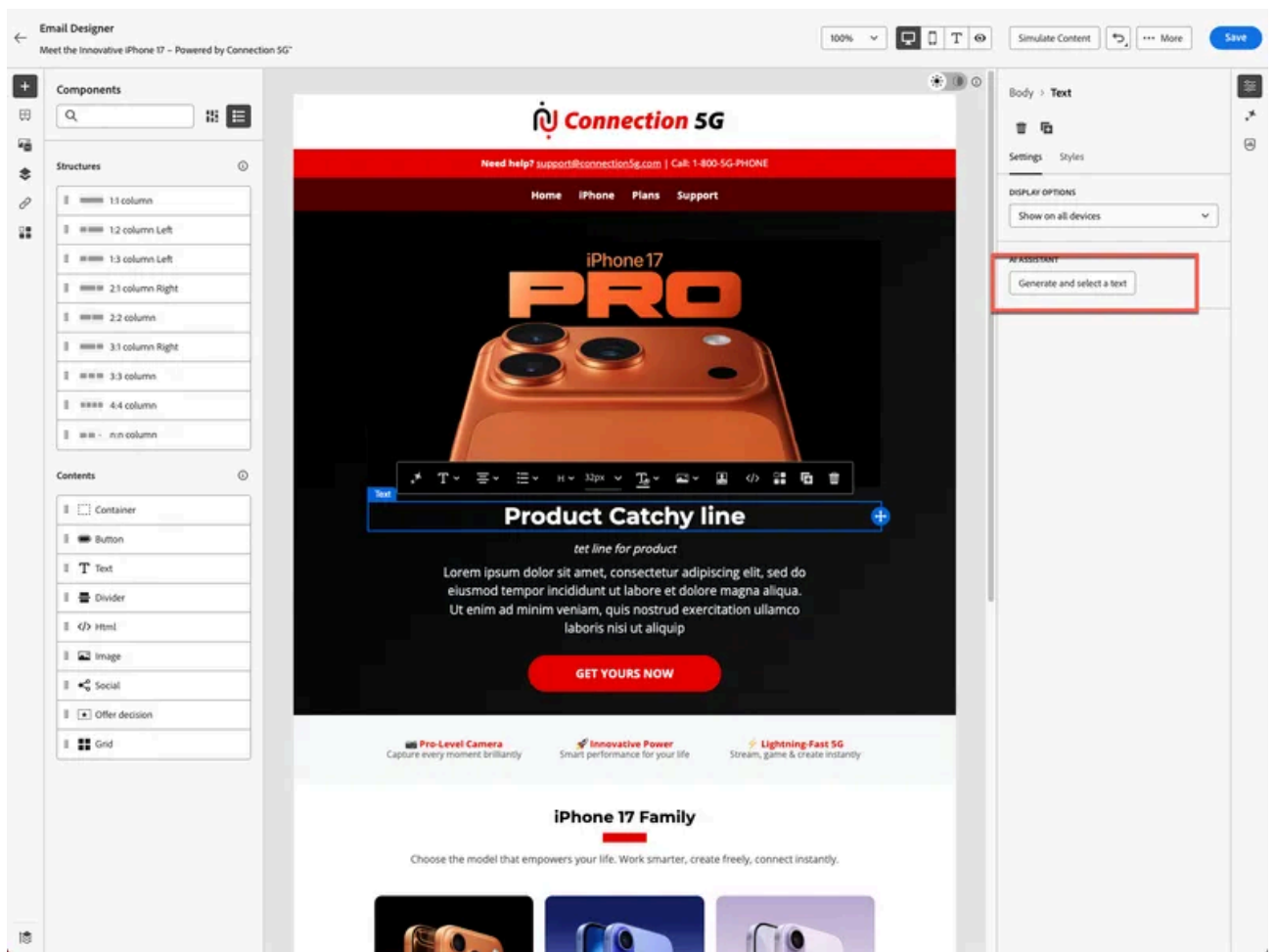
Note: Your results may be completely different from the lab guide, so do not need to worry. Select what you think is a right title and continue with the lab.

Improve Hero Title & Description

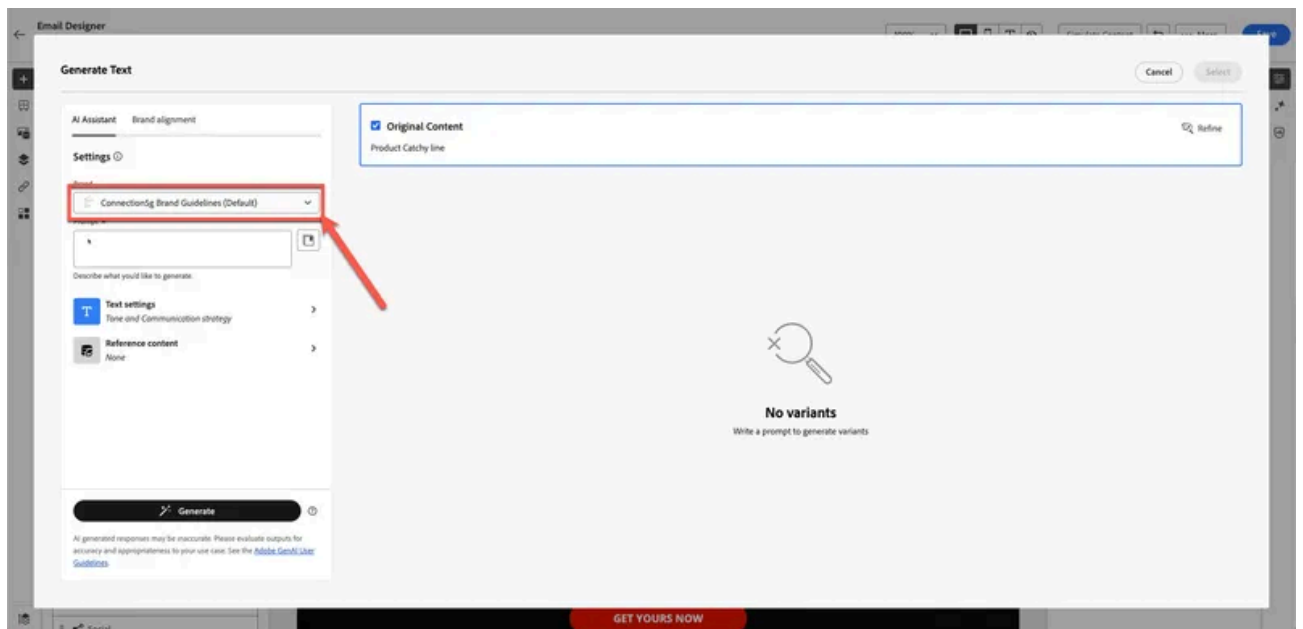
1. Open email by clicking on "Edit email body" button.



2. Click on the **Product Cathy line** heading.
3. Open AI Assistant by clicking on **Generate and select a text**



4. Select **Connection 5G Brand Guidelines** from the dropdown.



4. Prompt:

Write a bold, attention-grabbing headline for the iPhone 17 launch. Keep it under 10 words

6. Click on Text settings to change the tone and communication strategy. Change Communication strategy to **FOMO (Fear of Missing Out)**, Language to **English** and Tone to **Exciting**. Use shorter version by scaling down the dial.

The screenshot shows the 'Generate Text' interface. On the left, the 'Text settings' panel is visible. It includes a 'Communication strategy' dropdown set to 'FOMO' (annotated with a red box and '1'), a 'Language' dropdown set to 'None' (annotated with a red box and '2'), and a 'Tone' dropdown set to 'Exciting' (annotated with a red box and '3'). Below these is a 'Shorter text' / 'Longer text' slider with a knob positioned towards the 'Shorter text' side. At the bottom of the settings panel is a 'Generate' button (annotated with a red box and '4'). To the right of the settings, there is a 'Refine' section with a 'Product Catchy line' input field and a 'Refine' button. The main area of the interface displays 'No variants' with a magnifying glass icon and the text 'Write a prompt to generate variants'.

7. Click the **Generate** button
8. Review and select the best version,
9. If your text is long then use the slider to "**shorter text**" and regenerate the text.

AI Assistant Brand alignment

← Text settings

Communication strategy

FOMO

Language

None

Tone

Exciting

Shorter text

Longer text

☐

10. Once you are happy with the text click on **Select**

Email Designer

Generate Text

AI Assistant Brand alignment

← Text settings

Communication strategy

FOMO

Language

None

Tone

Exciting

Generate

Enable experimentation Cancel **Select**

☐ Original Content

Product Catchy line

☐ Write a bold, attention-grabbing headline for the iPhone 17 launch. Keep it under 10 words

Speed Unlocked—iPhone 17 is Here!

Combines excitement with urgency to drive immediate response and prevent procrastination.

☒ Write a bold, attention-grabbing headline for the iPhone 17 launch. Keep it under 10 words

Join the iPhone 17 Revolution With Connection 5G

Leverages herd mentality to boost urgency and persuade readers through peer influence.

☐ Write a bold, attention-grabbing headline for the iPhone 17 launch. Keep it under 10 words

VIP Access: iPhone 17 Changes Everything

Makes recipients feel special, increasing excitement and fear of missing out.

☐ Write a bold, attention-grabbing headline for the iPhone 17 launch. Keep it under 10 words

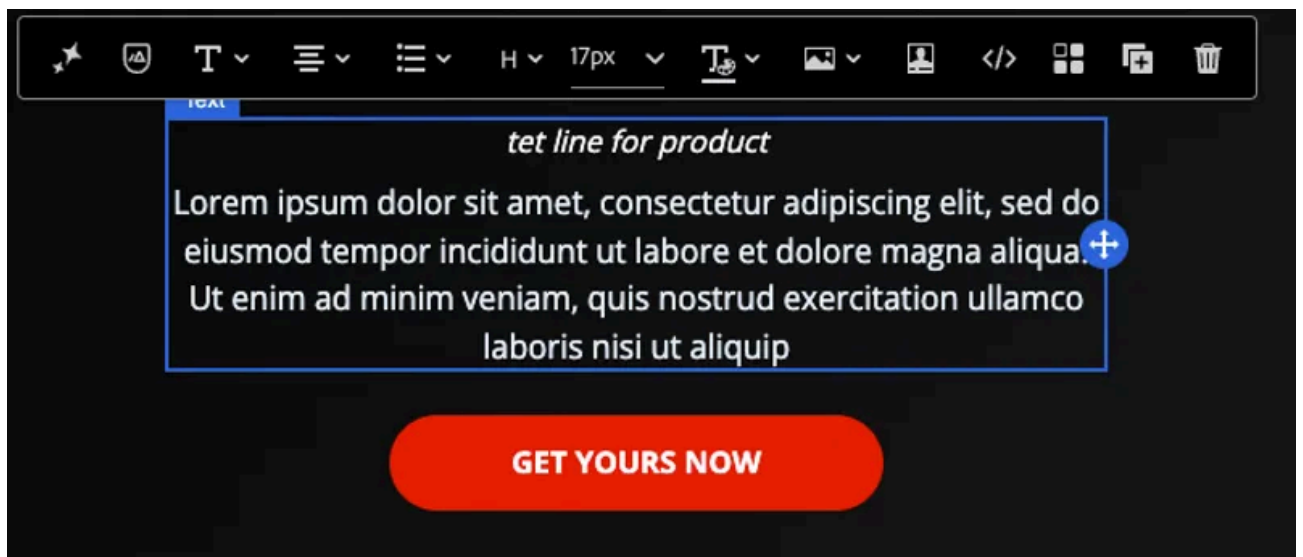
iPhone 17 Launch—Time is Running Out!

GET YOURS NOW

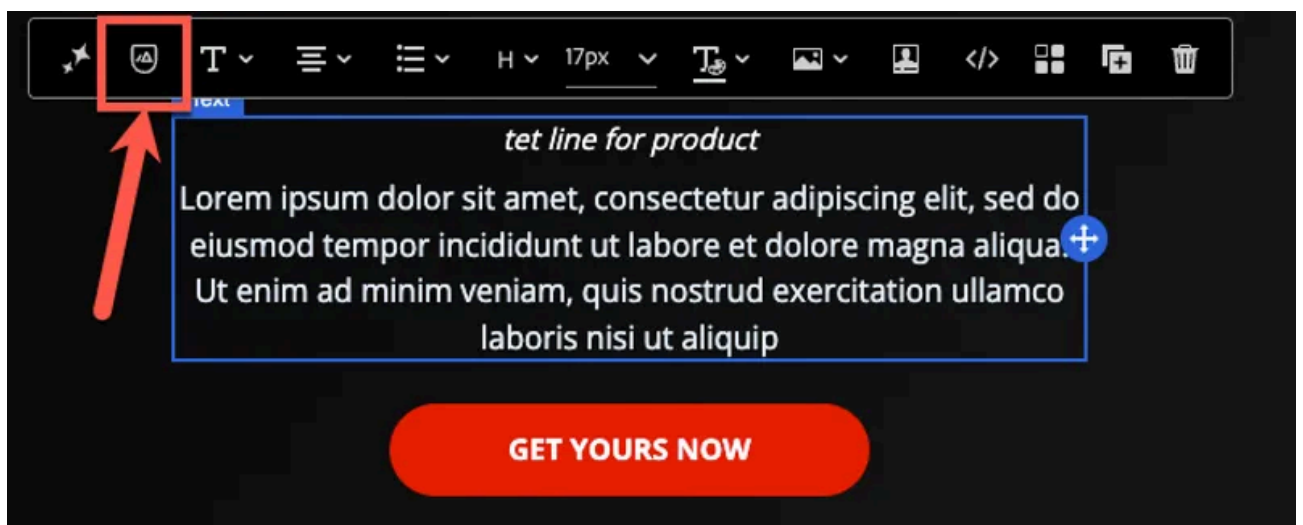
Description prompt

This time we want to test how AI can help to find issues.

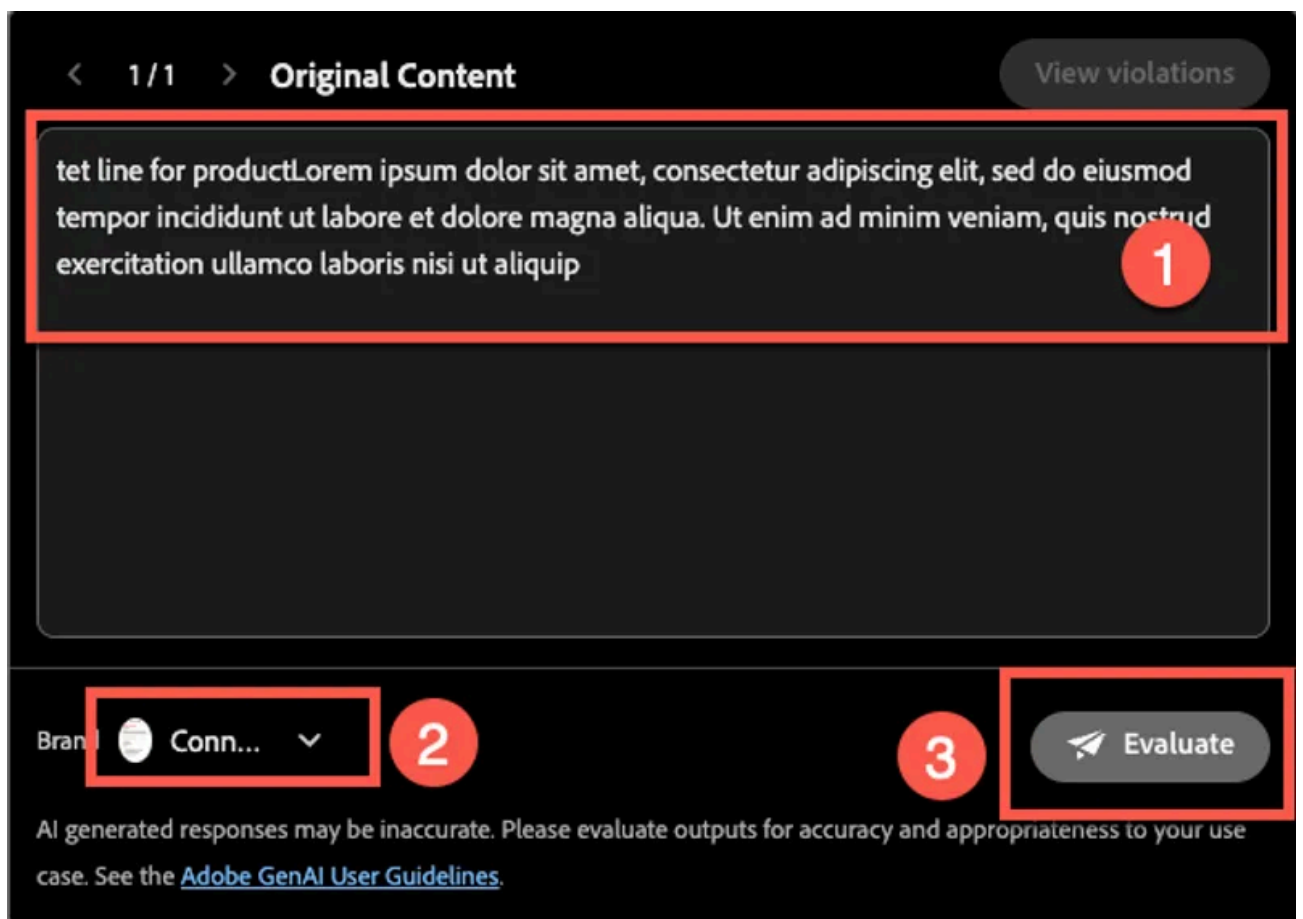
1. Select the text below which is templated text and has no meaning.



2. Click on evaluate button as shown below.



3. Your original content will be automatically selected with your brand, as shown in Steps 1 and 2 below. Click the **Evaluate** button to proceed.



4. As expected, you will notice many errors that violate brand guidelines. Although these could be corrected using AI, in this case we will not revise the existing materials. Instead, we will leave them as they are and create new content from scratch that fully aligns with brand standards.

← Violation details

Fix with AI

⚠ Content mis-aligned

Mis-aligned with 4 violations

1: Use concise and friendly language; focus on customer benefits

The segment 'tet line for productLorem ipsum dolor sit amet, consectetur adipiscing elit, se... [Show more](#)

2: Focus on empowerment and future-readiness in core messaging.

The paragraph 'tet line for productLorem ipsum dolor sit amet, consectetur adipiscing elit, ... [Show more](#)

3: Use clear benefit statements (e.g., faster streaming, lower latency) in messaging.

The paragraph 'tet line for productLorem ipsum dolor sit amet, consectetur adipiscing elit, ... [Show more](#)

4: Disclaimer text: Use platform-appropriate legal statements on all branded content Type: legal Usage: In footers

The paragraph does not contain any legal disclaimer text, which is required for all branded

5. Lets use new paragraph that is generated for you using AI using the prompt below. You can use same approach for decription text using the prompt below.

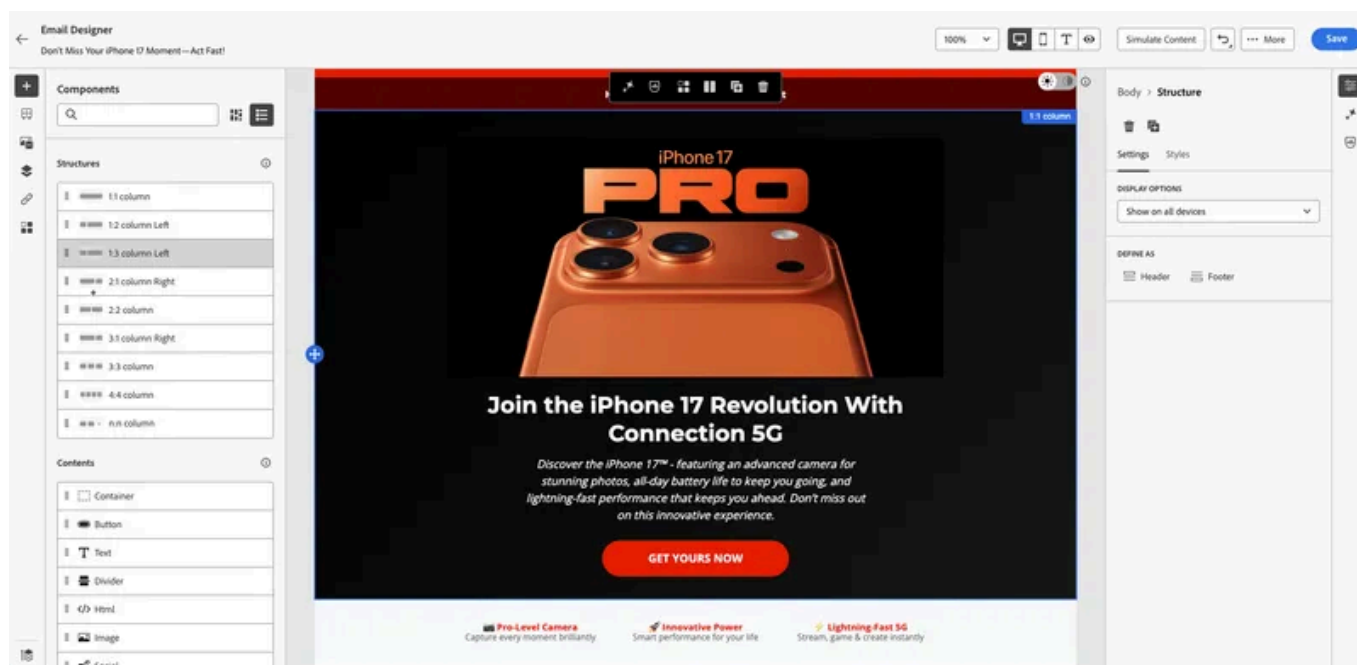
Prompt:

Write a compelling product description for the new iPhone 17. Highlight its most impressive features, such as advanced camera, battery life, and performance. The tone should be premium, exciting, and easy to understand for a wide audience. Keep it under 3 sentences.

In order to save time I have already created the text for you. Copy and paste below to get your text.

Discover the iPhone 17™ - featuring an advanced camera for stunning photos, all-day battery life to keep you going, and lightning-fast performance that keeps you ahead. Don't miss out on this innovative experience.

Your email should look like as shown below.



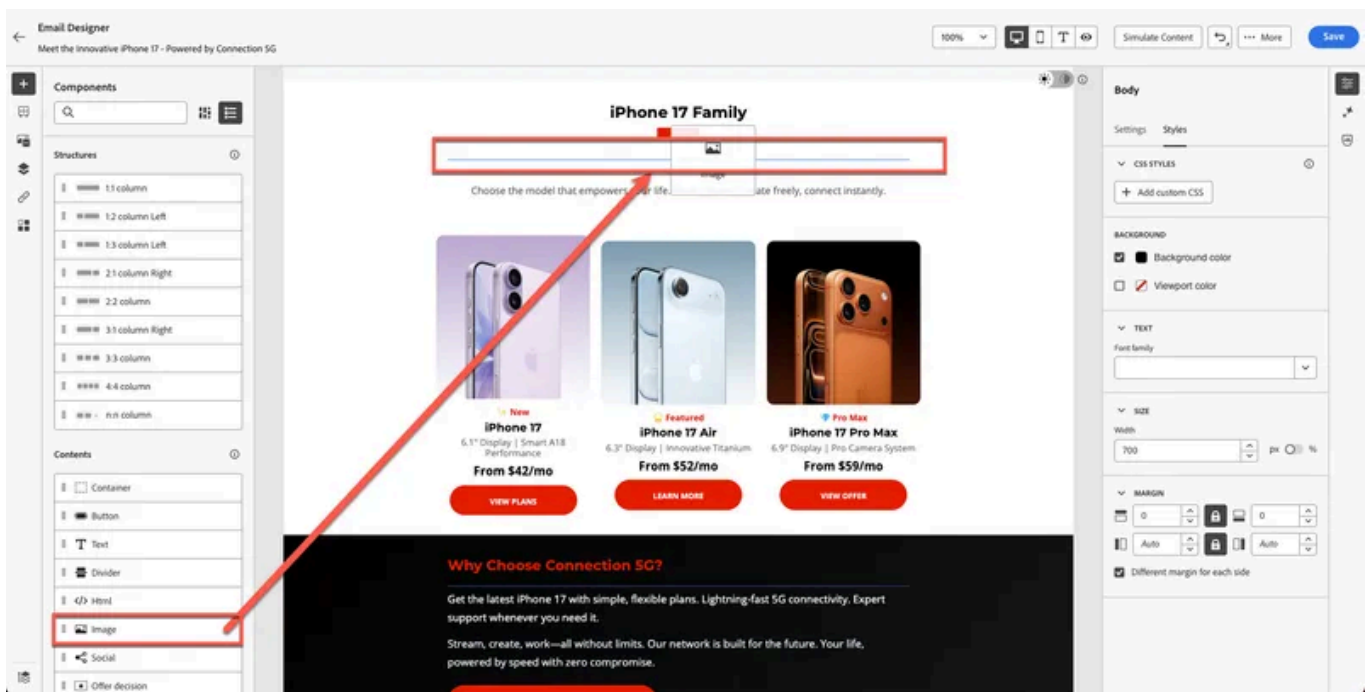
Add a Firefly-Generated Image

Until now, we have tested AI Assistant on Subject line and Text. What about images?

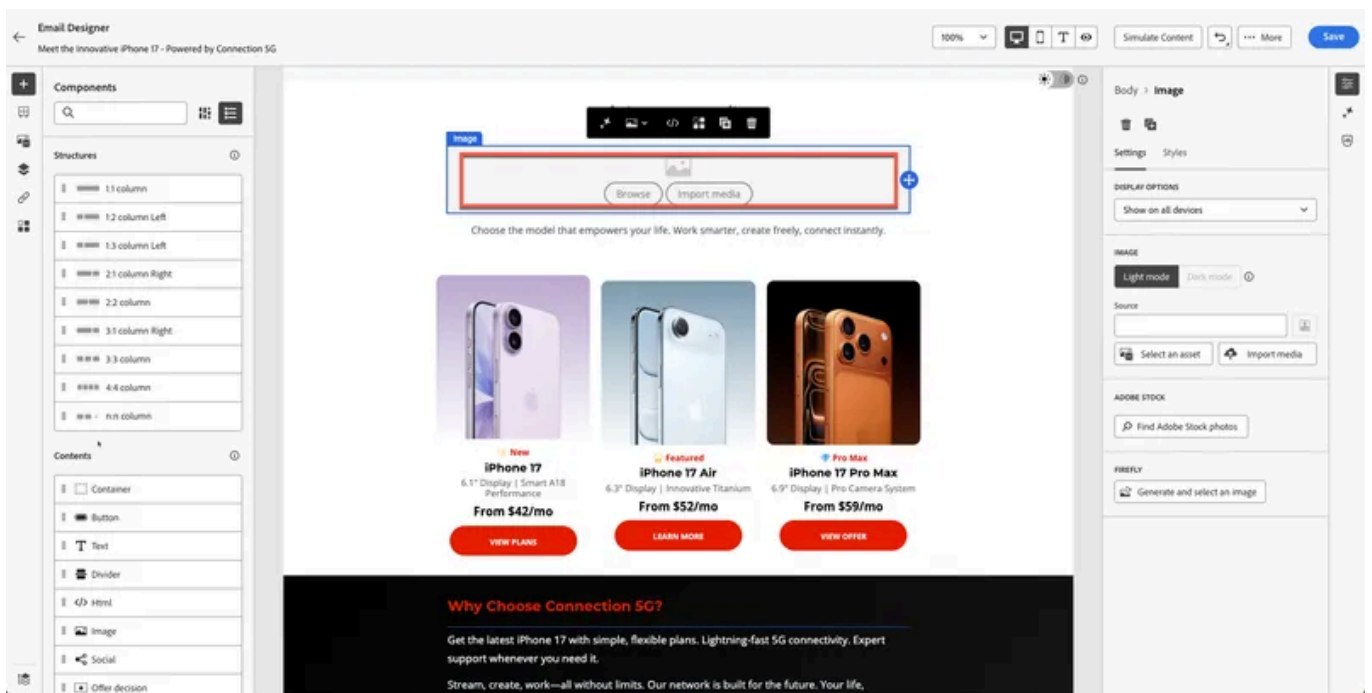
Before we dive into AI image generation, let us see what types of experiences we can build.

We understand that we have the year of birth of the profile. One of the experiences we can do is to create a block with different variants. With Adobe Journey Optimizer, this is possible and one of the biggest advantages of having Adobe Experience Platform as your base. We will cover experimentation in our next module, but first, let us prepare the block

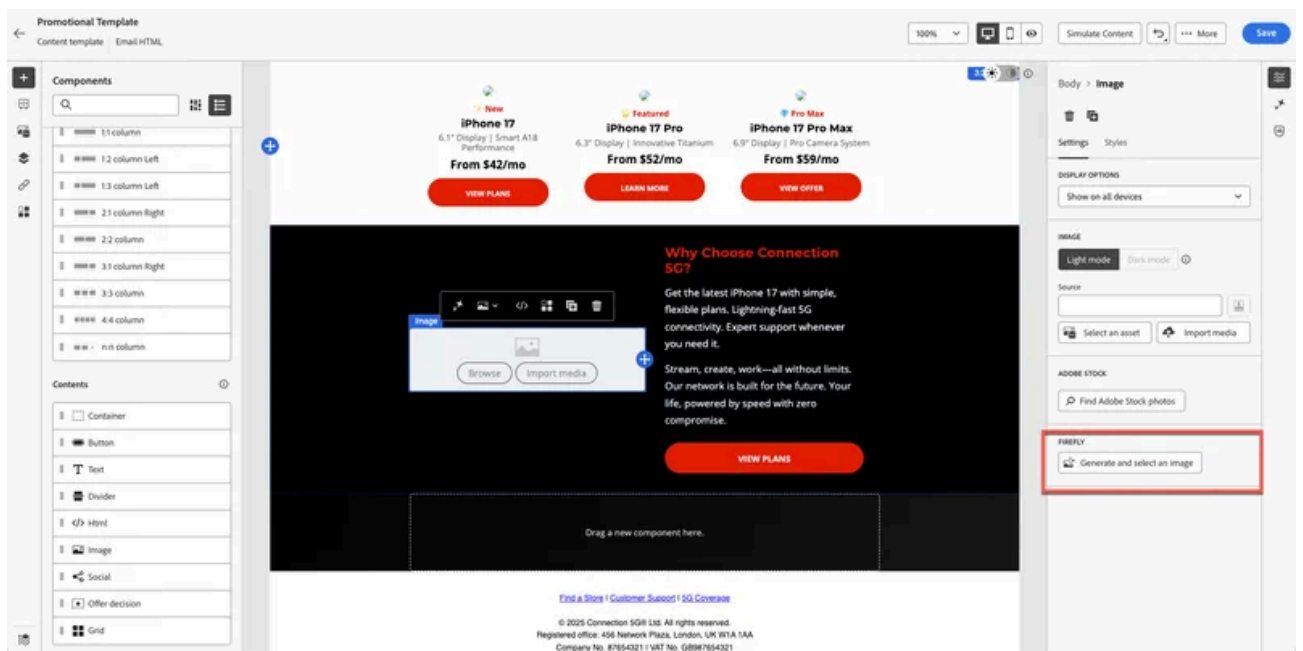
1. Drag an **Image** component to the left-hand side column below iphone 17 Family block.



2. Click outside then select the image placeholder. (Make sure you click on the image otherwise you wont see Firefly option)

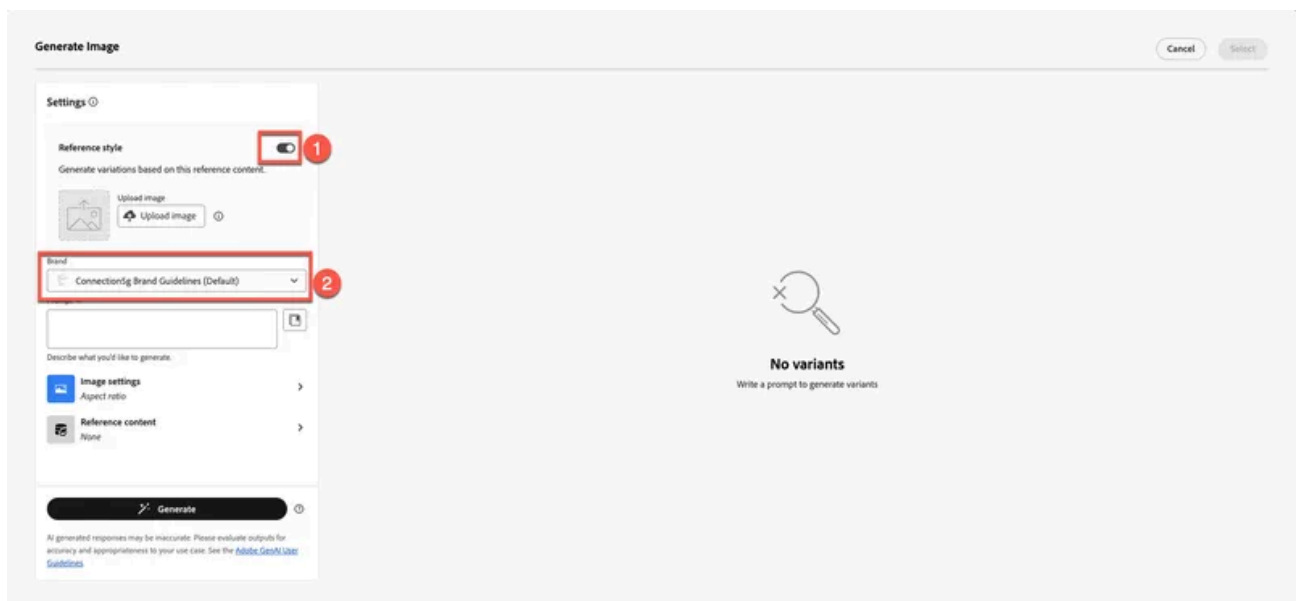


3. Under **Firefly**, click **Generate and select image**.

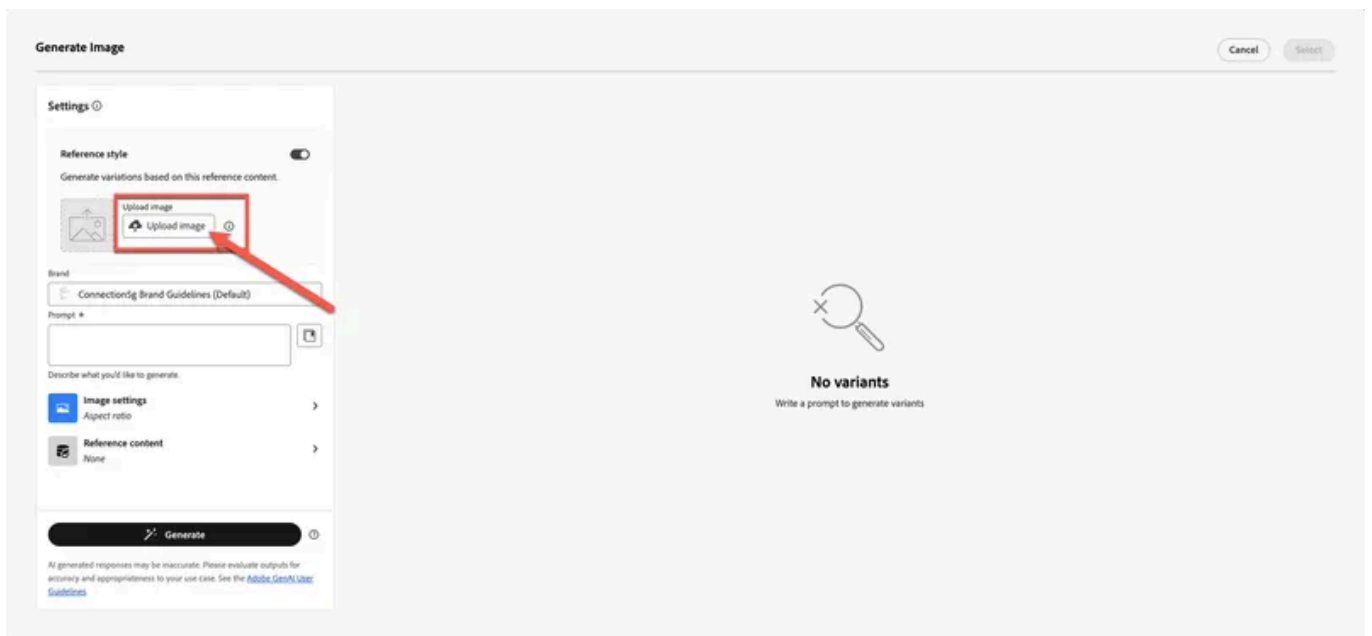


Upload Reference Image

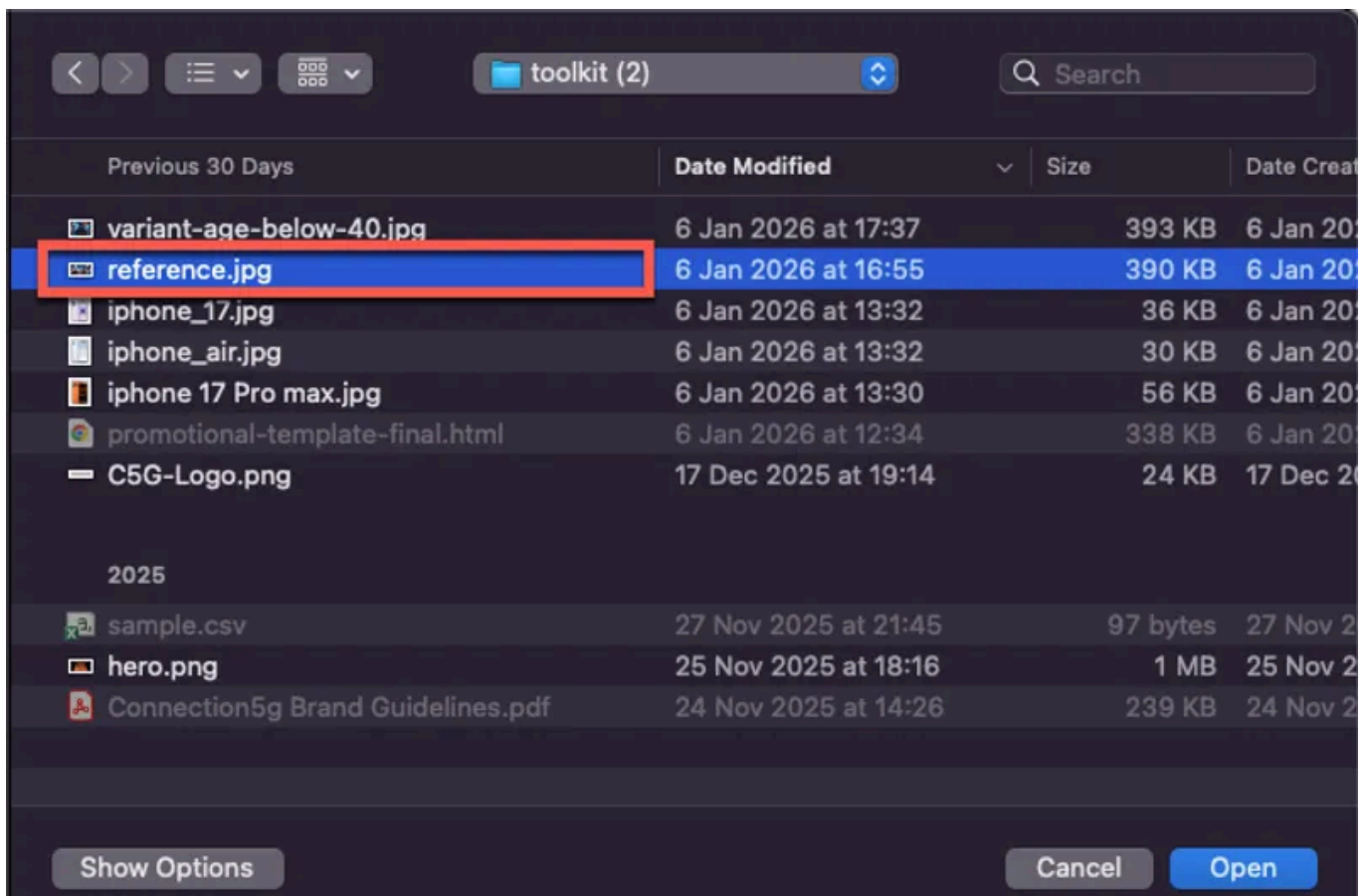
1. Turn on **Reference Style**.
2. Select **Connection 5G Brand Guideline** on brand selection



3. Click on Upload Image



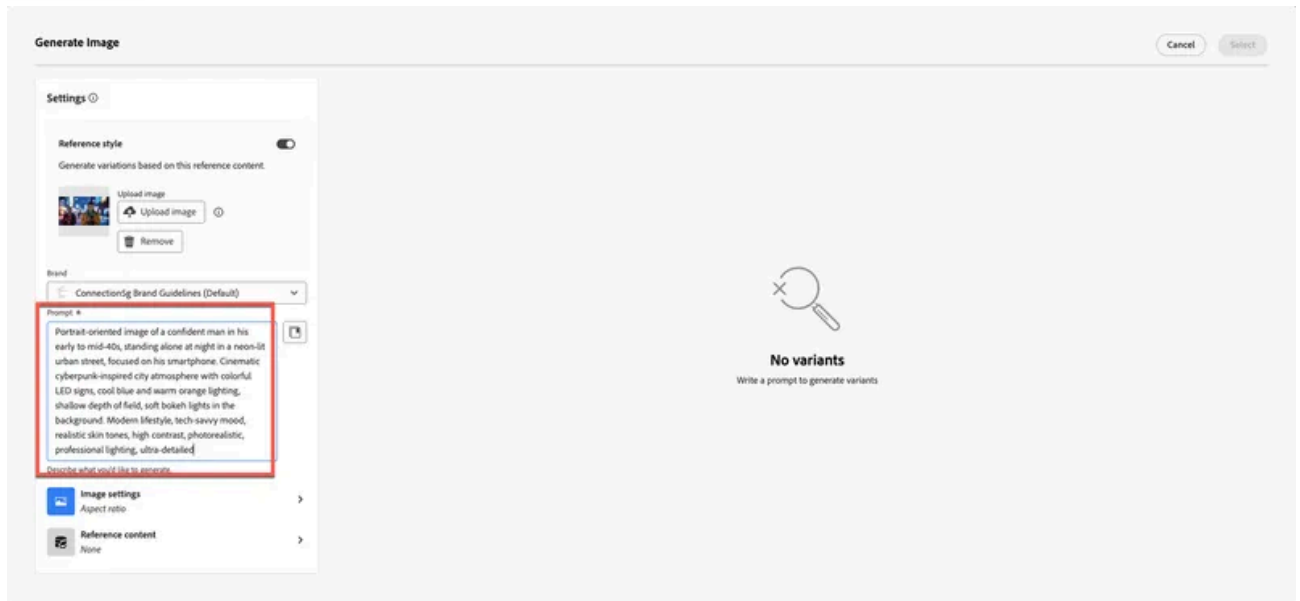
3. Select reference.jpg frmo the toolkit folder



4. Add Image Prompt

Portrait-oriented image of a confident man in his early to mid-40s, standing alone at night in a neon-lit urban street, focused on his smartphone. Cinematic cyberpunk-inspired city atmosphere with colorful LED signs, cool blue and warm orange lighting, shallow depth of field, soft

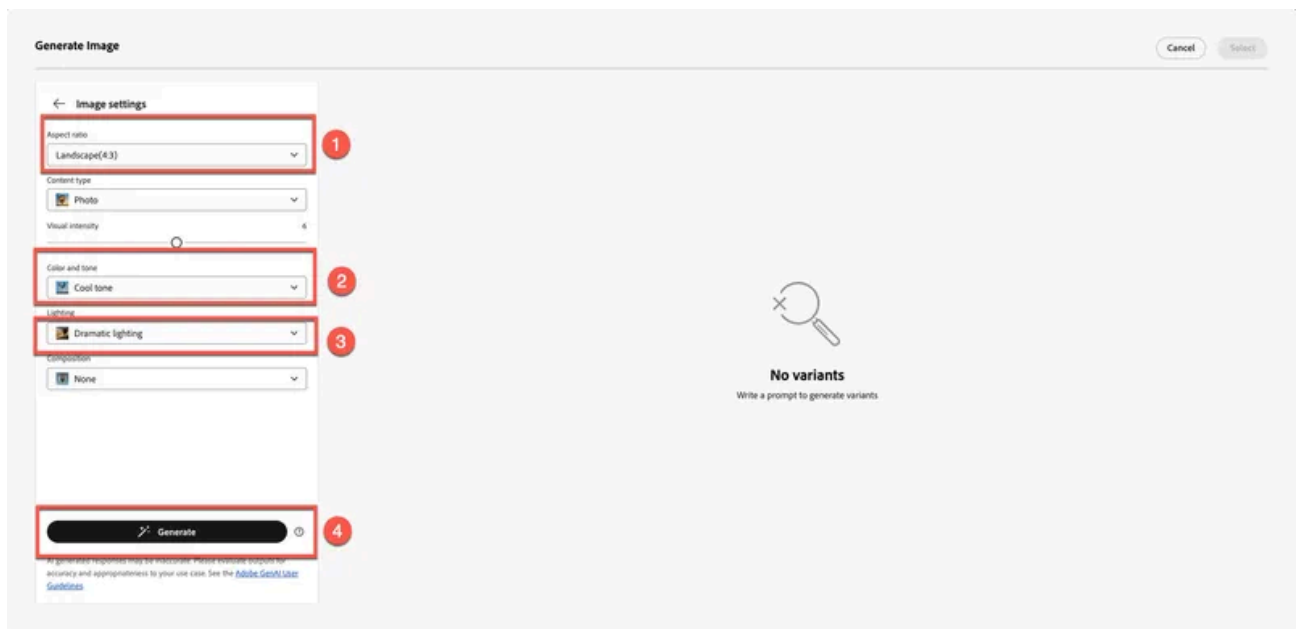
bokeh lights in the background. Modern lifestyle, tech-savvy mood, realistic skin tones, high contrast, photorealistic, professional lighting, ultra-detailed .



Choose Image Settings

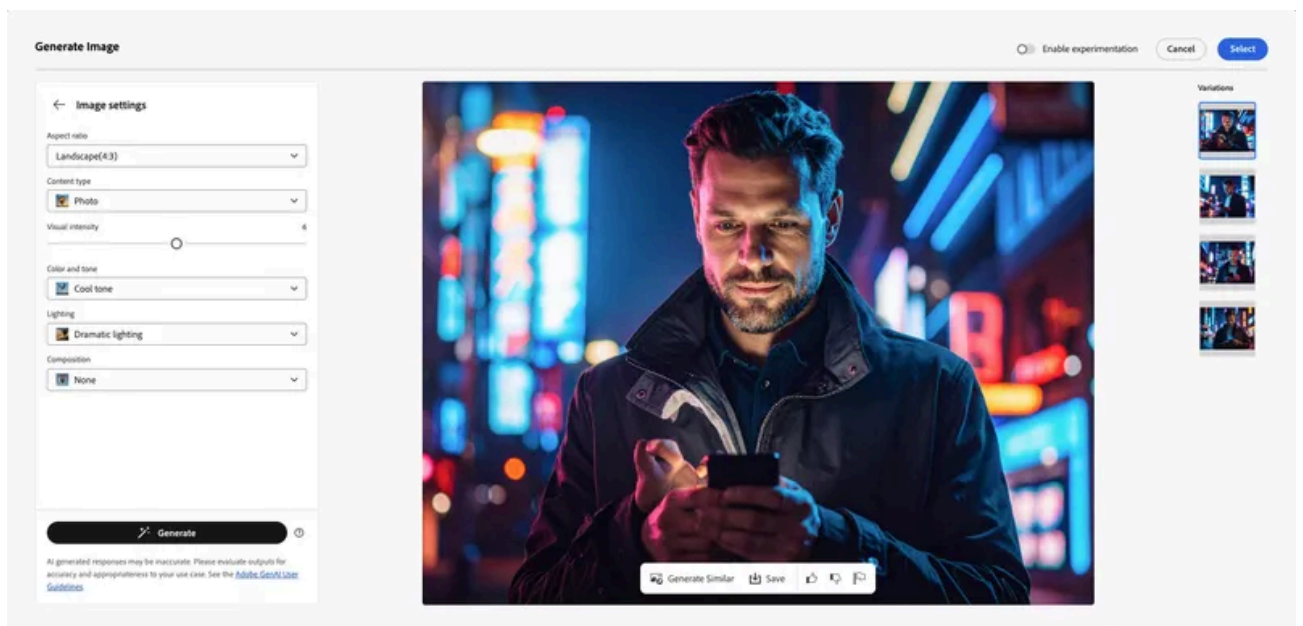
Choose your **Image settings**:

5. Choose the following settings:
 - **Ratio:** Landscape (4:3)
 - **Content type:** Photo
 - **Colour & tone:** Cool tone
 - **Lighting:** Dramatic Lighting
6. Press **Generate** button

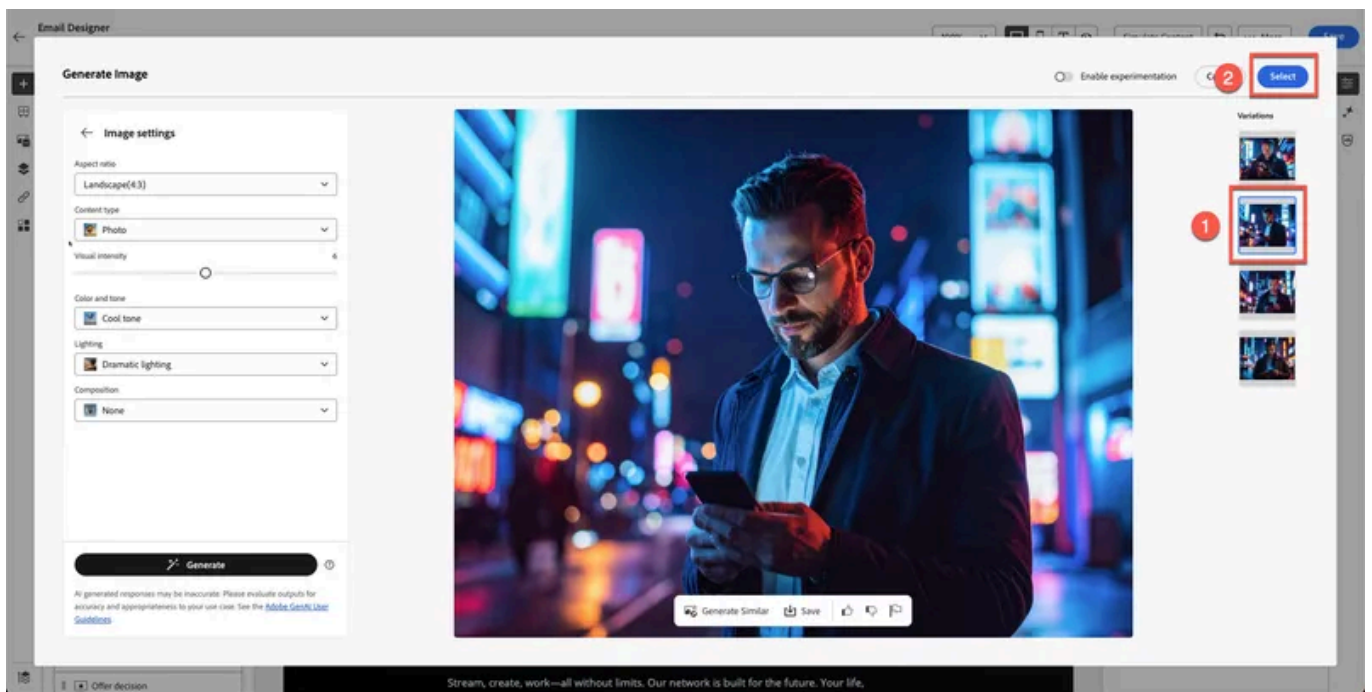


Select & Insert the Generated Image

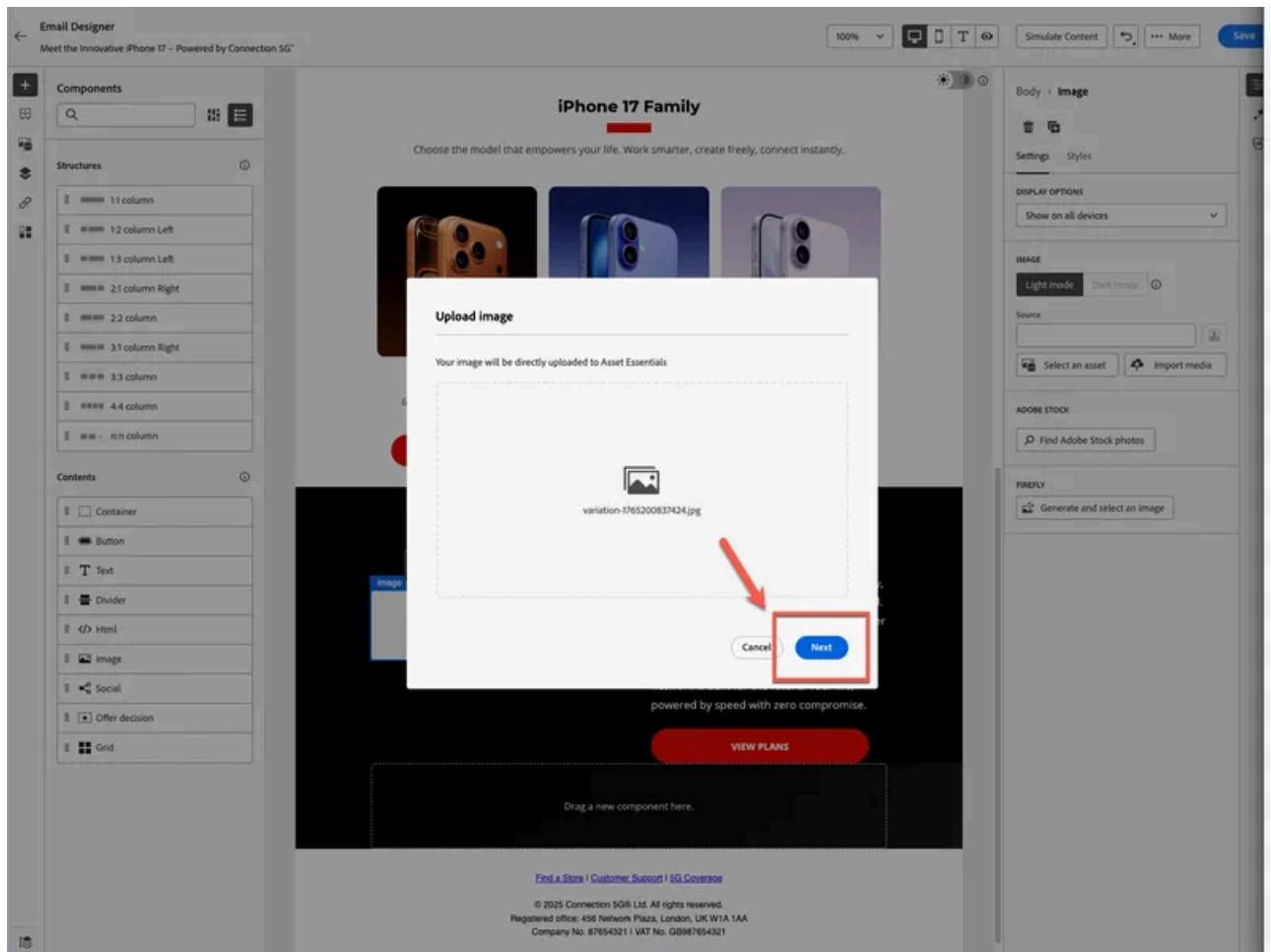
1. Review Firefly results by check all images generated.



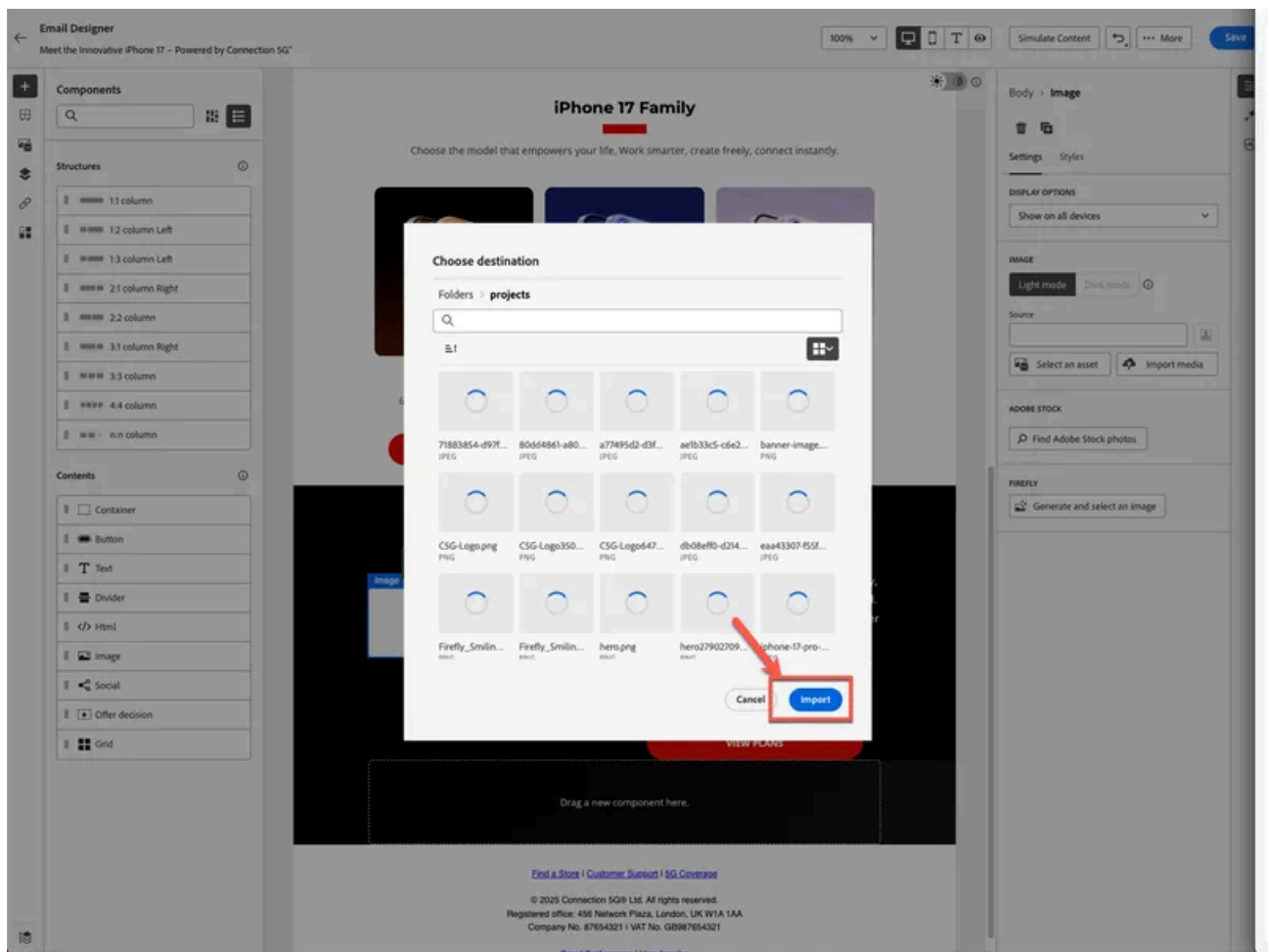
2. Click **Select** for your desired chosen image.



3. If prompted with an upload modal, click **Next**.



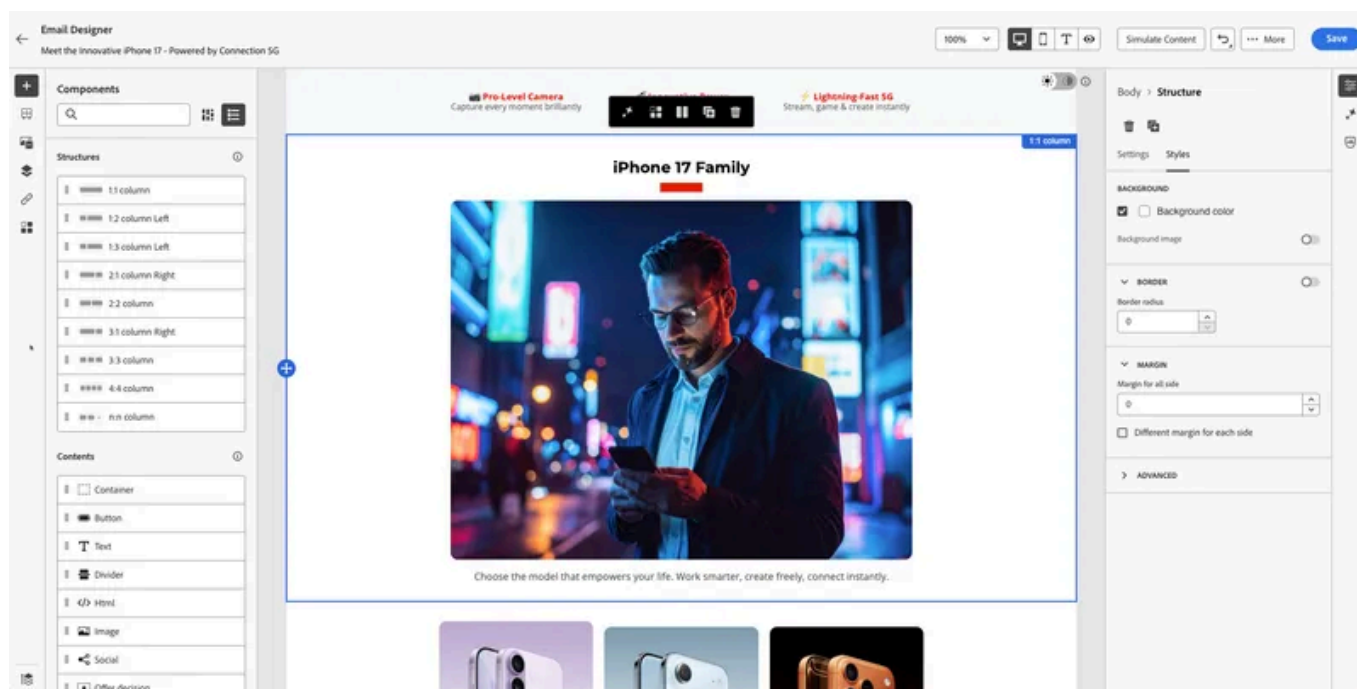
4. Then click **Import**.



Finalise Block Design

I have applied rounded border radius by 10 just to make it look modern. If you have time you can do that.

After few iterations and variation we have final design. Your final layout should resemble the example.



At this point, you should feel confident using AI to accelerate and elevate content creation.

Recap

You successfully used the AI Assistant to:

- Generate subject lines
- Refine hero text
- Rephrase paragraphs
- Change tone of messaging
- Create branded Firefly images using reference style
- Insert generated images into your email

You are now ready for next module - **Personalisation & Experimentation**, where you will build profile-driven variants and tests.

7.7. Personalization and Content Experimentation

Purpose: Learn how to personalise email content using profile attributes, build dynamic content variants, and apply conditional logic in Adobe Journey Optimizer.

Learning Objectives

By the end of this module, you will be able to:

1. Add personalisation fields using profile attributes.
2. Use the Personalisation Editor and Handlebars syntax.
3. Build dynamic content variants based on profile logic.
4. Create conditional rules for personalised content blocks.
5. Test variant switching based on attributes such as birth year.

Introduction

Personalisation in Adobe Journey Optimizer enables one-to-one experiences at scale.

In this module you will:

- Insert personalised text (first and last name)
- Build age-based content variants
- Apply conditional logic using profile attributes
- Prepare content for simulation in Module 7

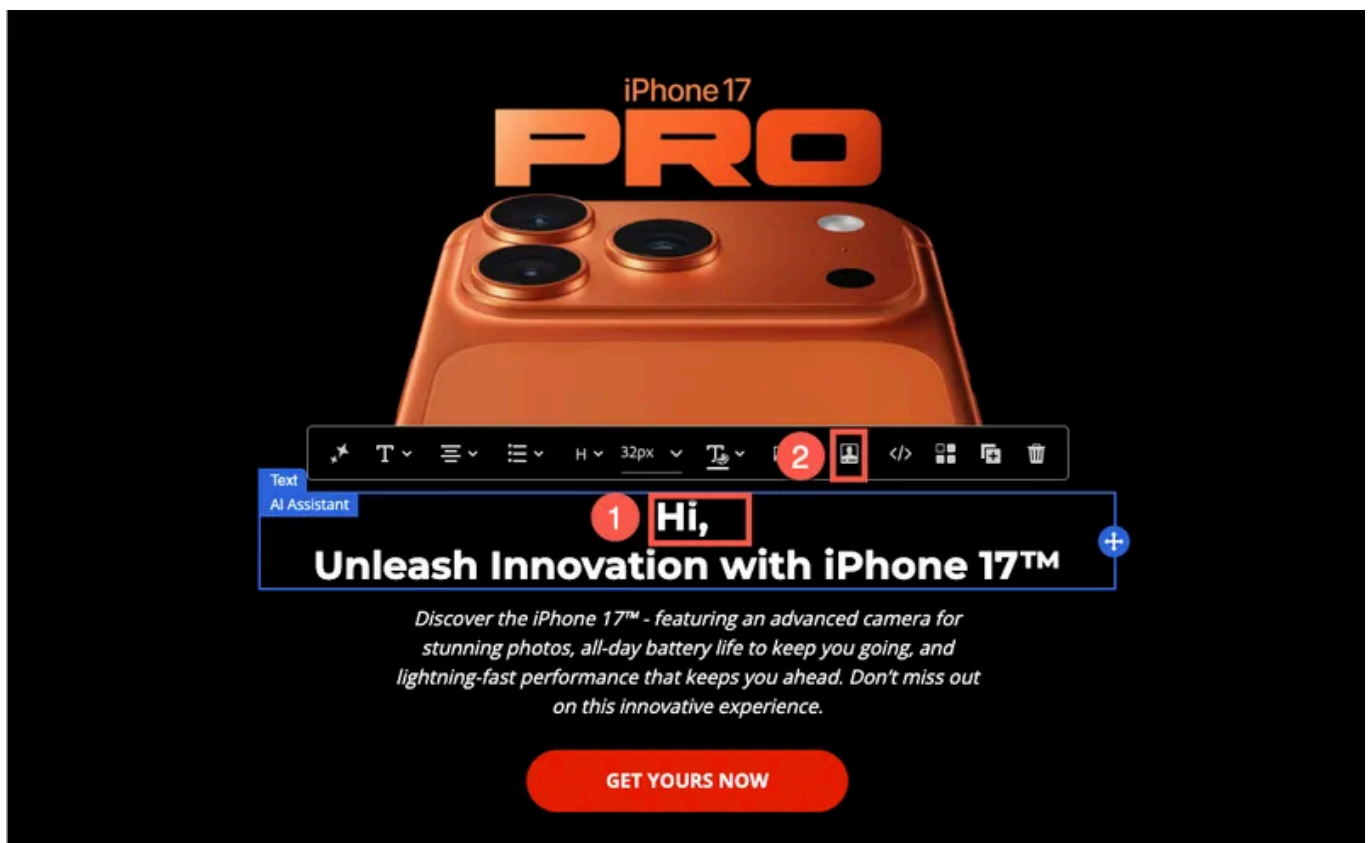
Personalization in Adobe Journey Optimizer empowers you to craft tailored, impactful customer experiences by dynamically customizing content based on individual profiles, behaviors, and contextual data. Whether you're creating personalized emails, notifications, or offers, the tools and techniques provided make it easy to connect the right message to the right person at the right time. Learn how the Personalization Editor, Handlebars syntax, and Adobe Experience Platform data work together to bring your ideas to life, explore reusable content blocks with expression fragments, and dive into advanced helper functions to unlock deeper possibilities. Each topic builds your skills step-by-step, ensuring you're ready to design personalized journeys with confidence.

Add Basic Personalisation

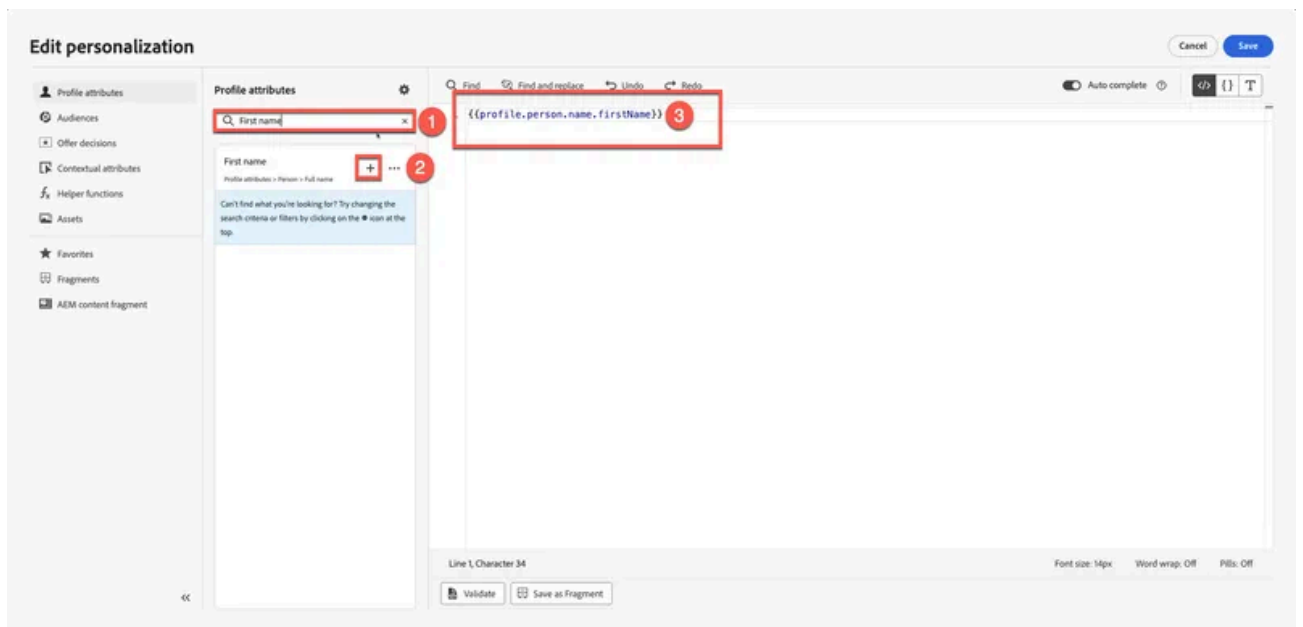
For this part of exercise we will keep personalisation simple. We want to add first and last name in the email based on the profile. Personalization is based on the profile data that are managed by the XDM Individual Profile schema which you have defined. The XDM Individual Profile schema is the only schema you can use to personalize content in Journey Optimizer.

Add a text "Hi," above the main title and lick on personalisation icon.

1. Open your email created in earlier modules.
2. Add a text block above the hero title with the content: **Hi,**
3. Click the **Personalisation** icon.

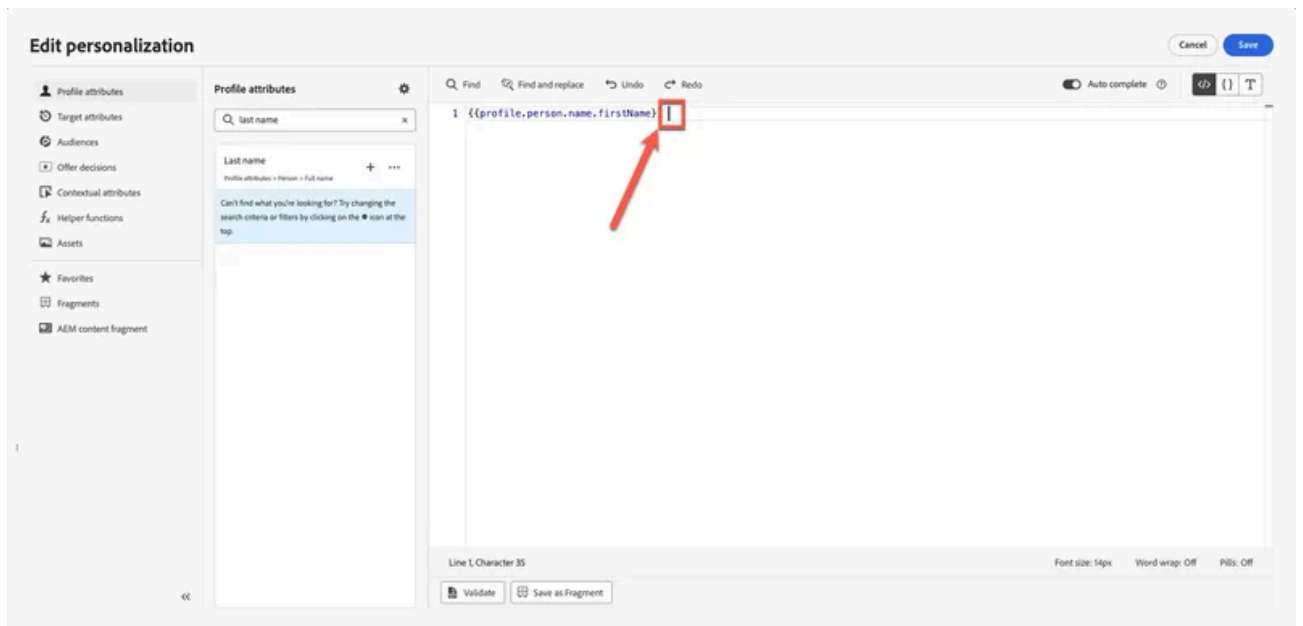


4. Search for **First Name**.



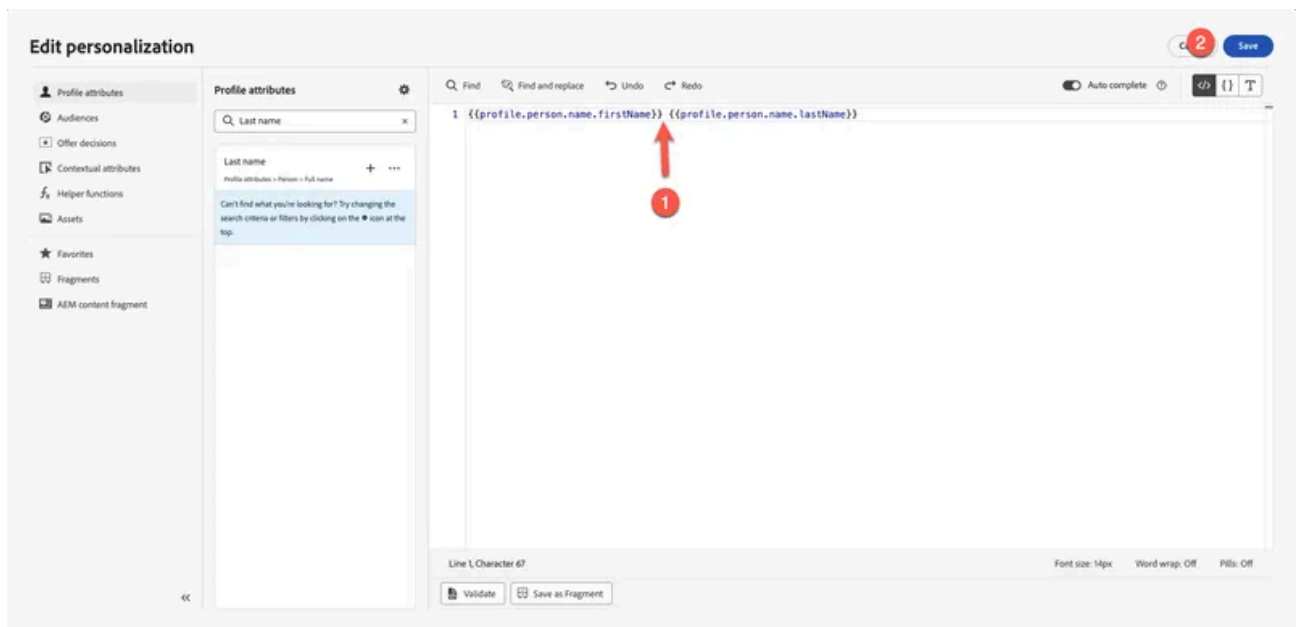
5. Click **+** to add it to the expression area.

6. Add a **space** after the **First name** field.



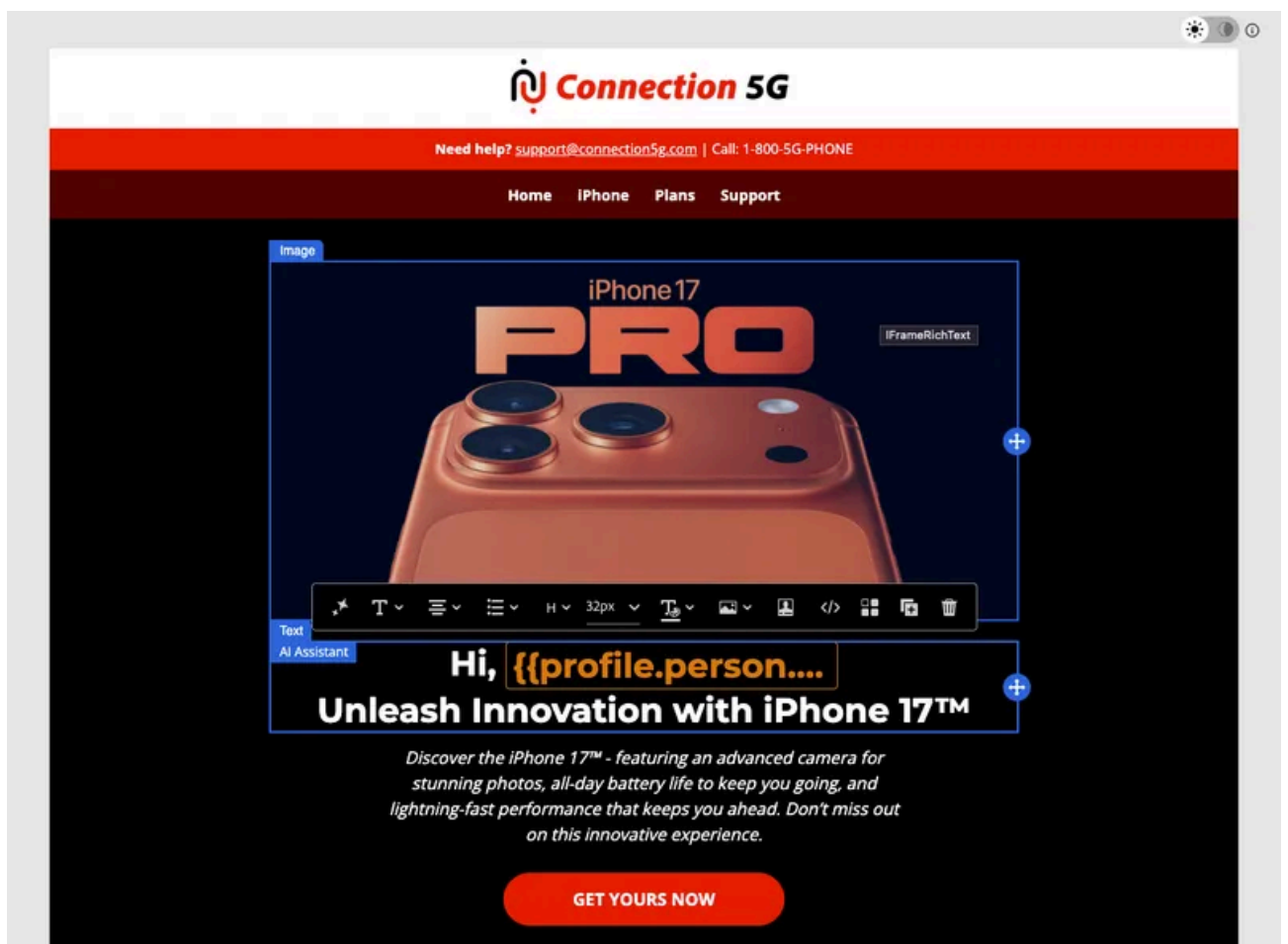
7. Repeat the process above but this time search and add **Last Name**.

Your final syntax should show first and last name variables clearly separated.



8. Validate the fragment. Note that there is an option to save the content as fragment.
This is a great opportunity to do if you will be using Full name for other email content creation. We can skip and go to the next step.
9. Click **Save**

Your view should be like this. Curly brackets consists of variables and each individual will receive email with their names.



At this point, you know how you can add personalisation for individual profiles.

Introduction to Dynamic Content

Dynamic content in Adobe Journey Optimizer empowers you to create personalized messages that adapt seamlessly to your audience. By using conditional rules, you can tailor emails, SMS, and push notifications based on profile attributes, audience membership, or real-time events. Whether you're crafting a fallback message for when specific criteria aren't met or saving reusable rules for consistency, the personalization editor and Email Designer offer intuitive tools to bring your ideas to life.

We have a perfect use case for adding some conditional content for our email and making it personalized based on the user's age.

Refer back to your schema: You have **"person.birthYear"** as birth year. This attribute can come in handy. Let us target and set up a campaign based on age.

For this exercise, you will create two variants based on age. One variant targets users above 40 years old, and the other targets users below 40 (perhaps in mid 20s and 30s). Anyone born before the year 1986 is considered above 40, while anyone born in 1986 or later is considered below 40.

Age Logic

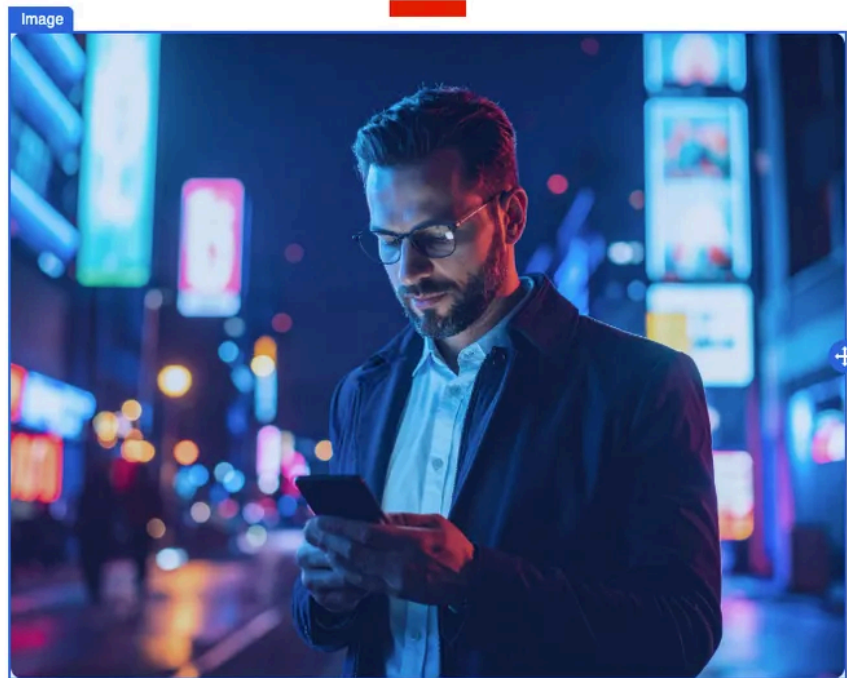
You will use the profile attribute `person.birthYear`.

Target Group	Condition
Above 40	birthYear < 1986
Below 40	birthYear >= 1986

Create Two Image Variants

Remember this block we created in our previous module? Your image will be different from mine.

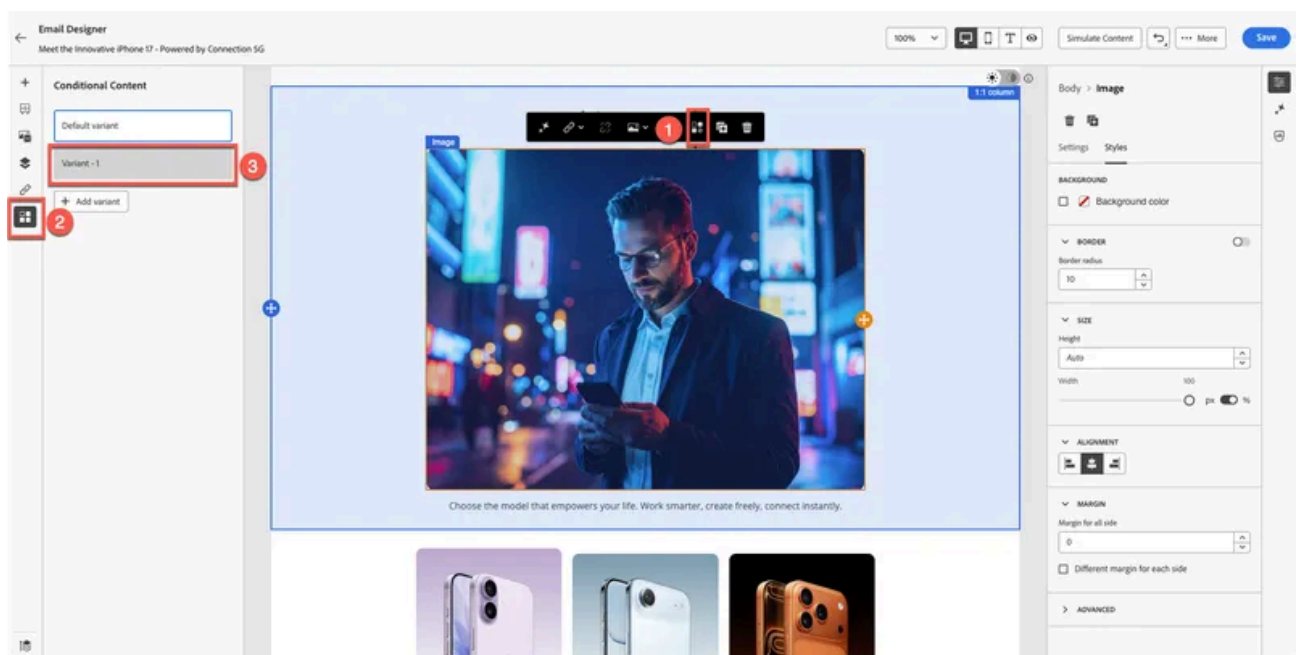
iPhone 17 Family



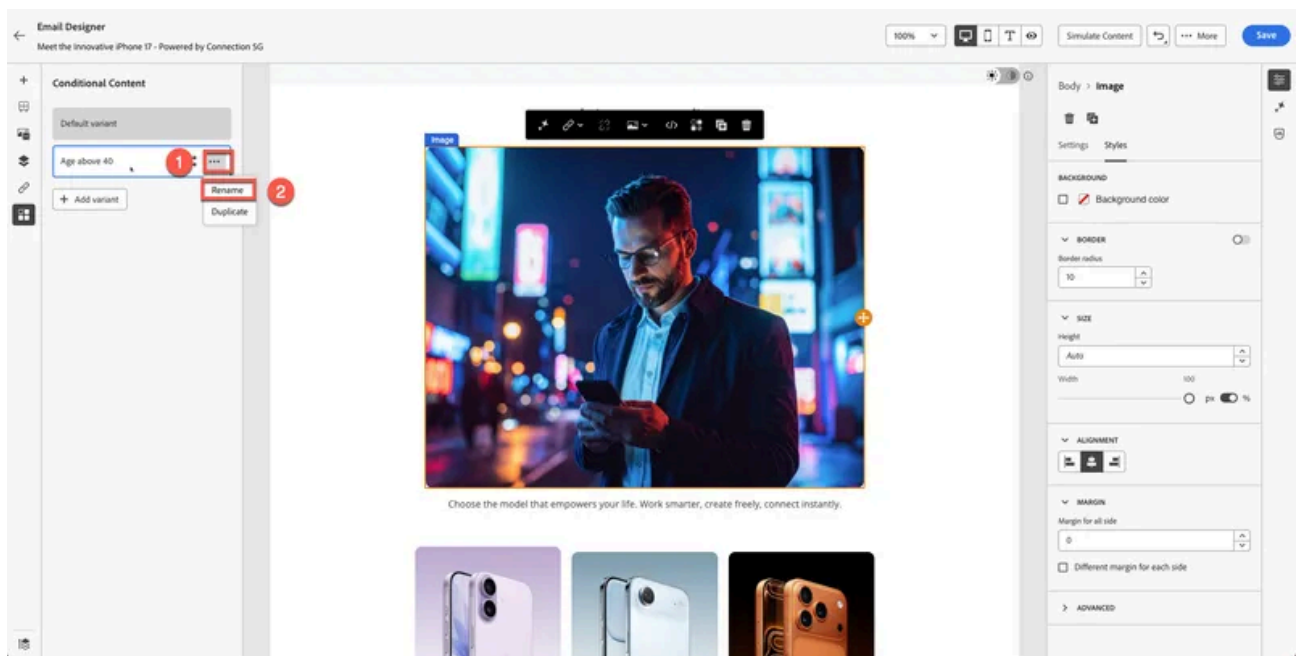
Choose the model that empowers your life. Work smarter, create freely, connect instantly.

We will create another image for those aged below 40 (Remember we created Firefly image of person mid-40s) and use that for our exercise.

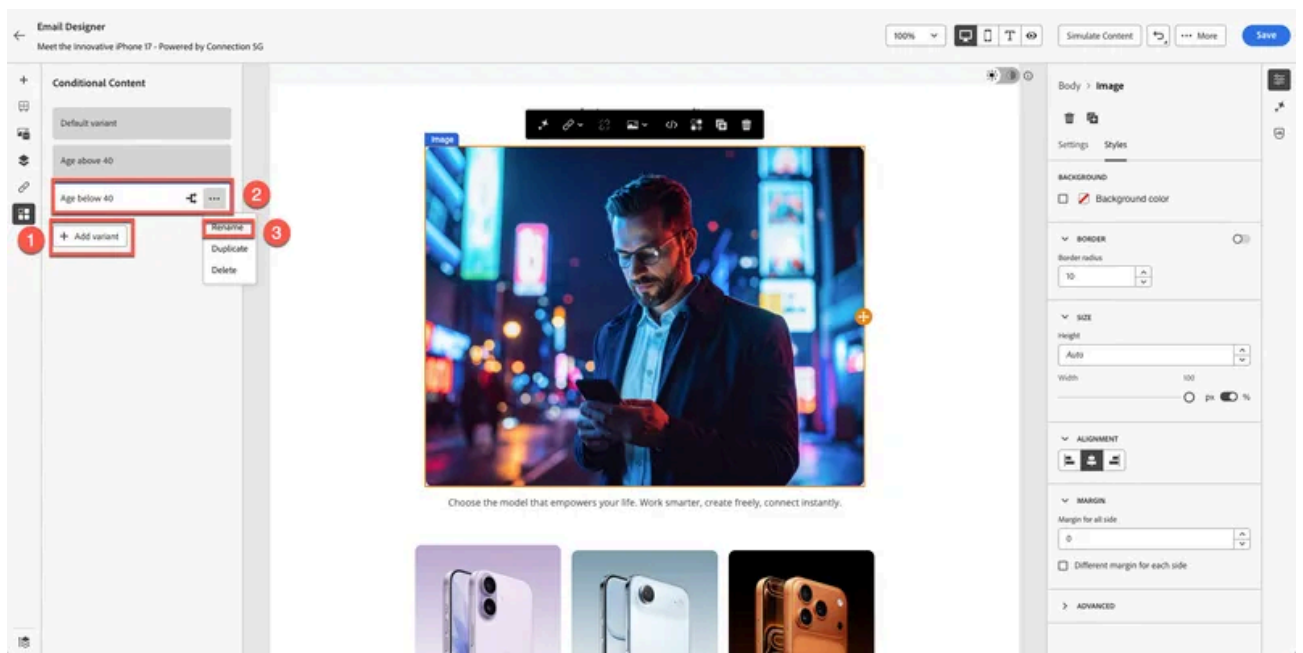
1. Select the existing image block. (Click on the image) and click **Conditional Block**.
2. Click **Add Variant**.



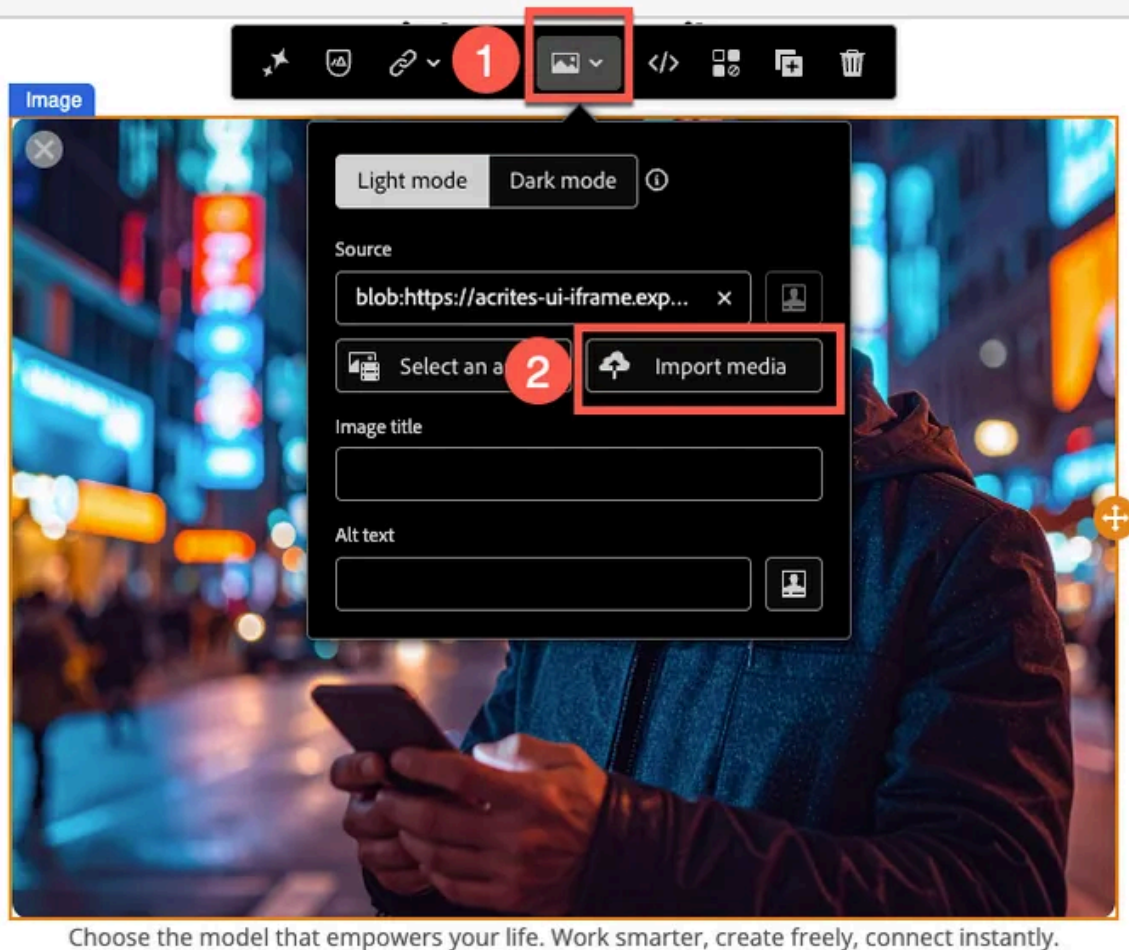
4. Rename the first variant to **Age above 40**.



5. Create a new Variant by clicking on **"Add variant"** button and Rename it to **Age below 40**.

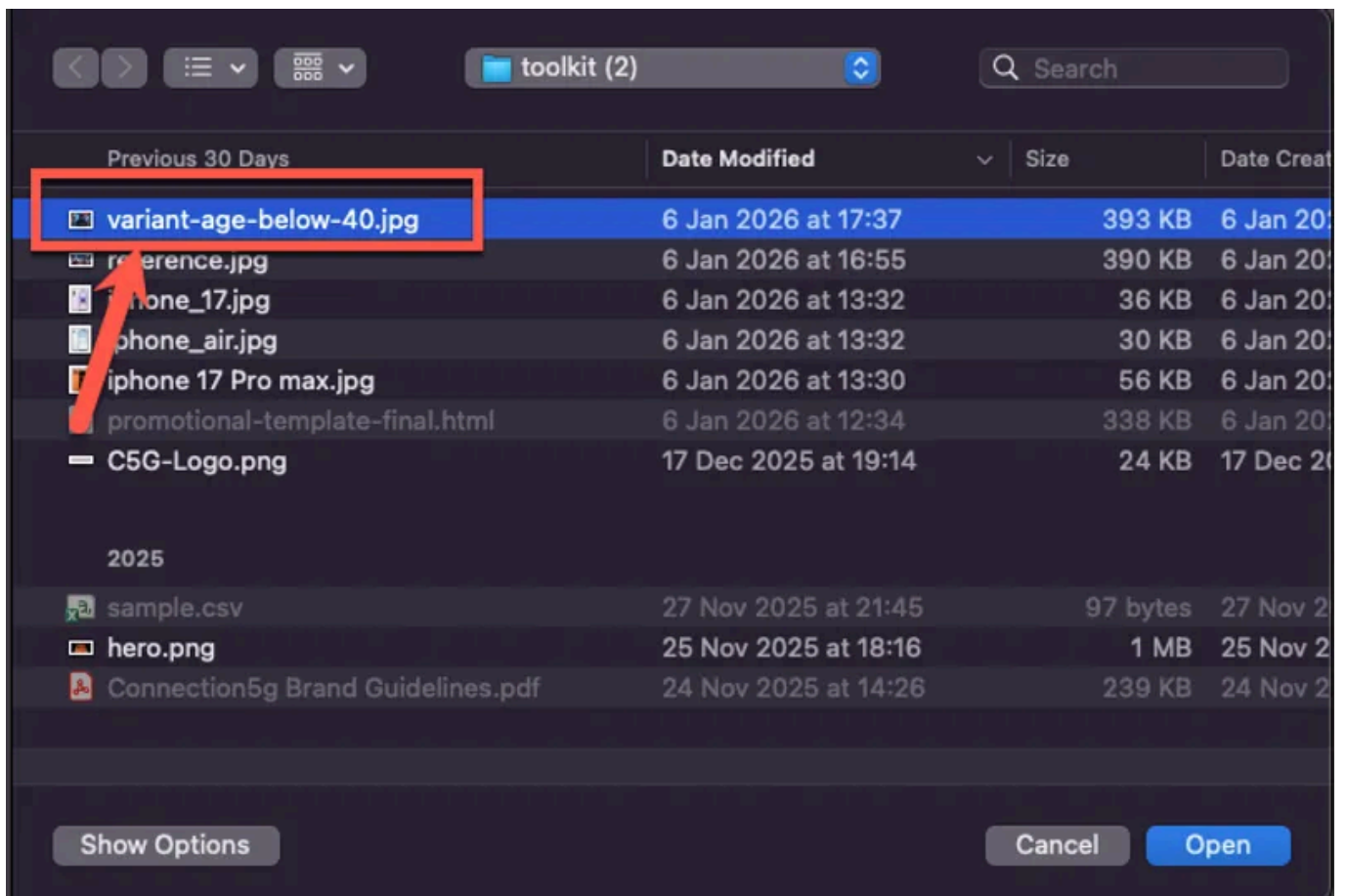


6. You could potentially create an image using Firefly by using a prompt such as "mid-20-year-old." However, to save time, we already have an image in the toolkit called **"variant-age-below-40.jpg"**.
7. Click on the image and Import Media.



Choose the model that empowers your life. Work smarter, create freely, connect instantly.

8. Select **variant-age-below-40.jpg** image. Import it by clicking on Next and finally press import in your folder (you should be default within your folder)

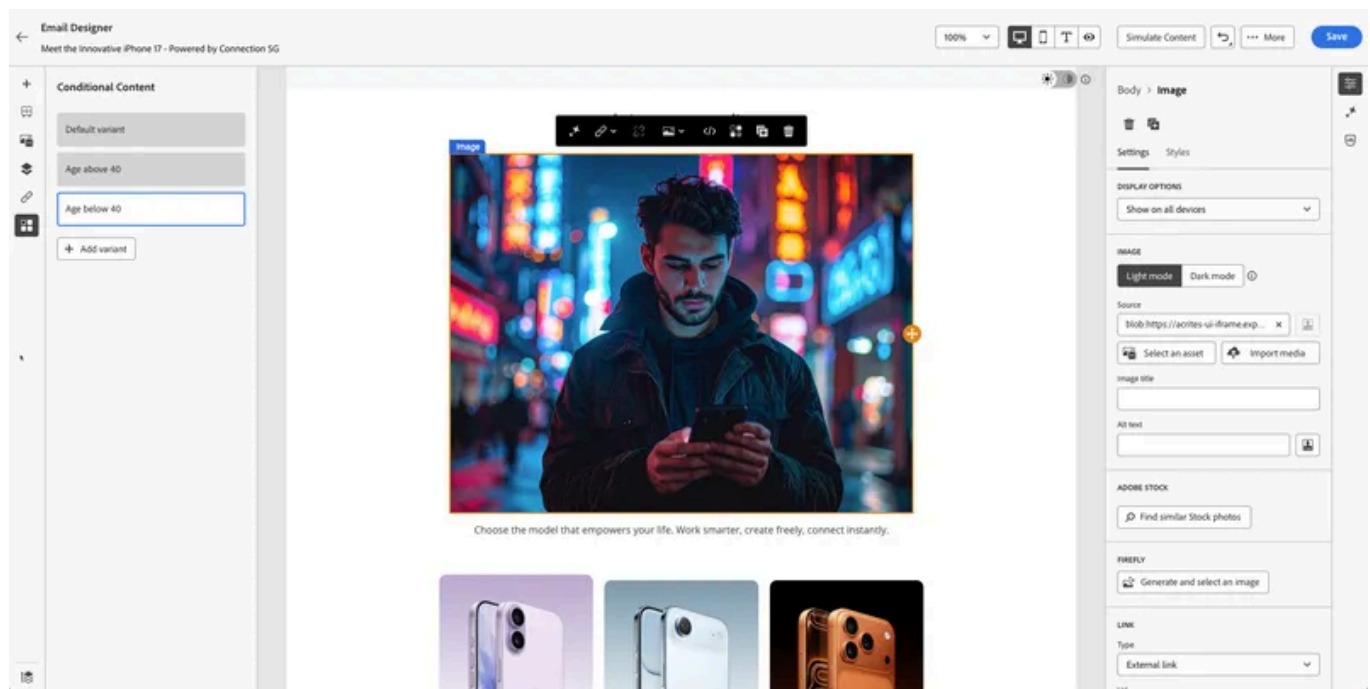


9. Try to toggle between variants and you will see different image is applied.

So far we have built the design but have not applied the logic. We will do this in next step.

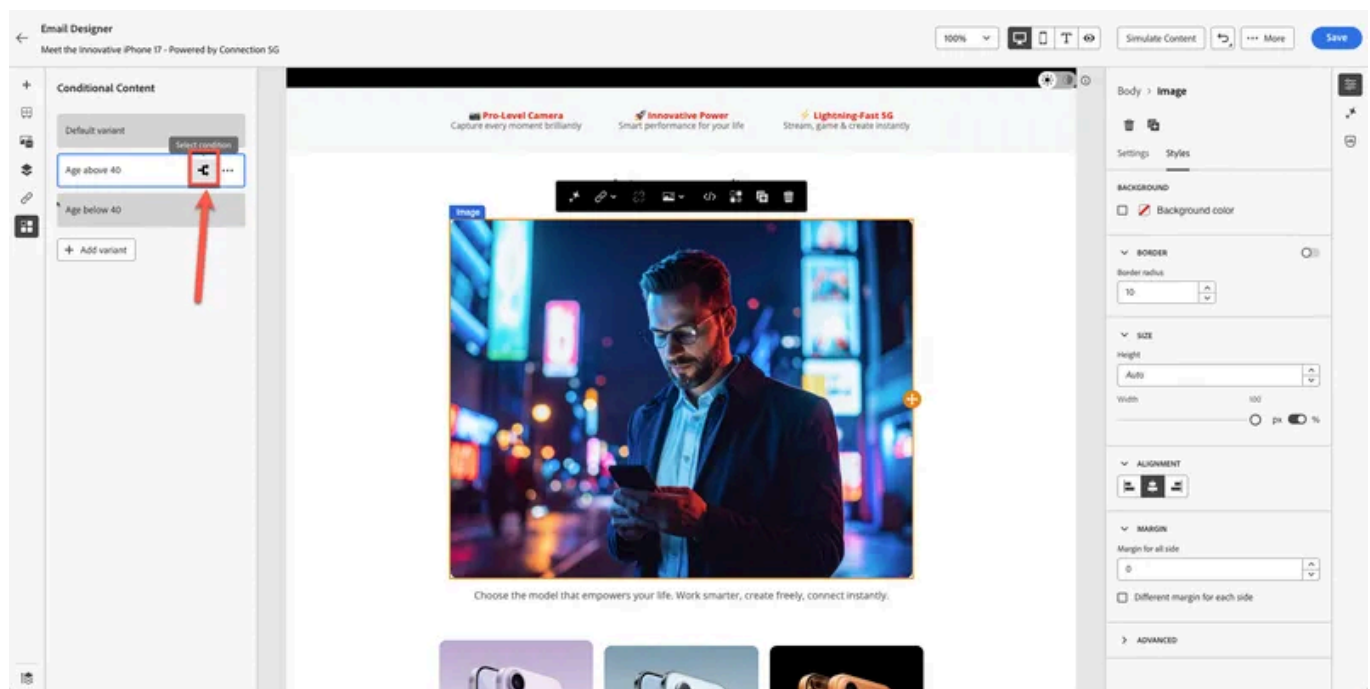
Apply Conditional Logic to Variants

Both of the variants are ready but we have not applied conditional logic.

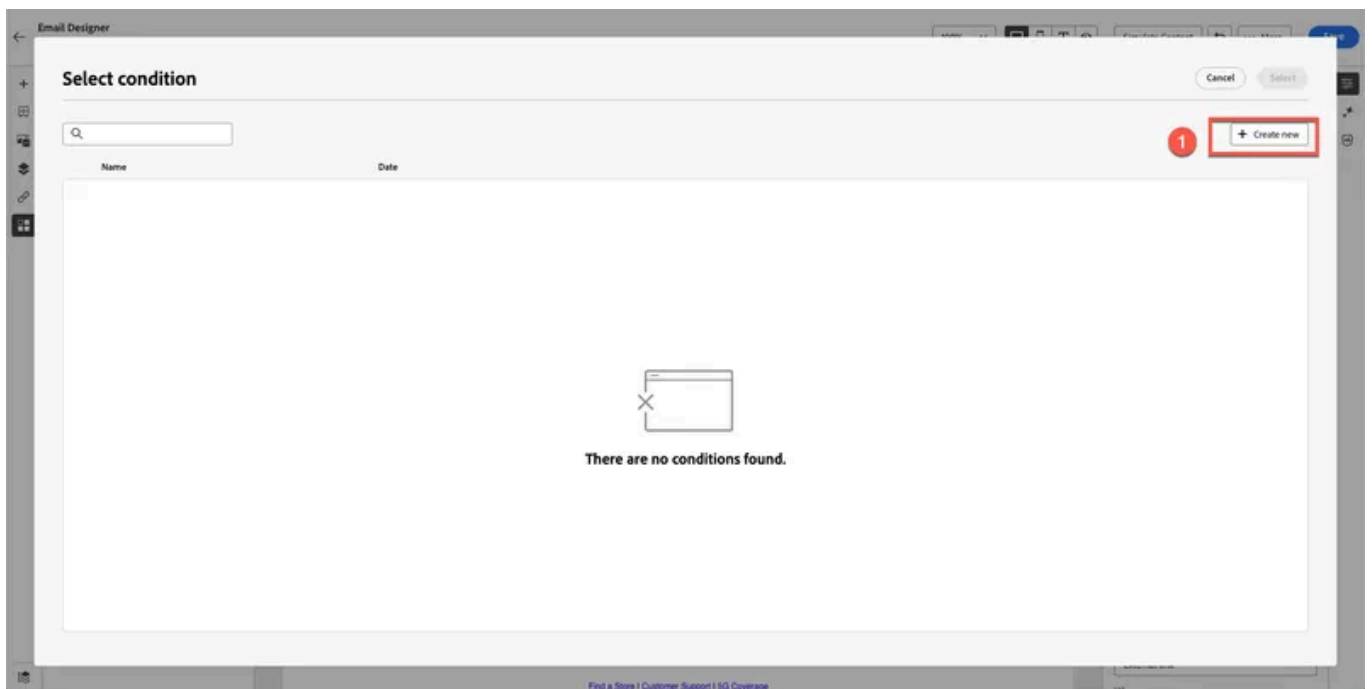


Logic for "Age above 40"

1. Select and hover the **Age above 40** variant.
2. Click the **Conditional Logic** icon.



3. Create a new condition.

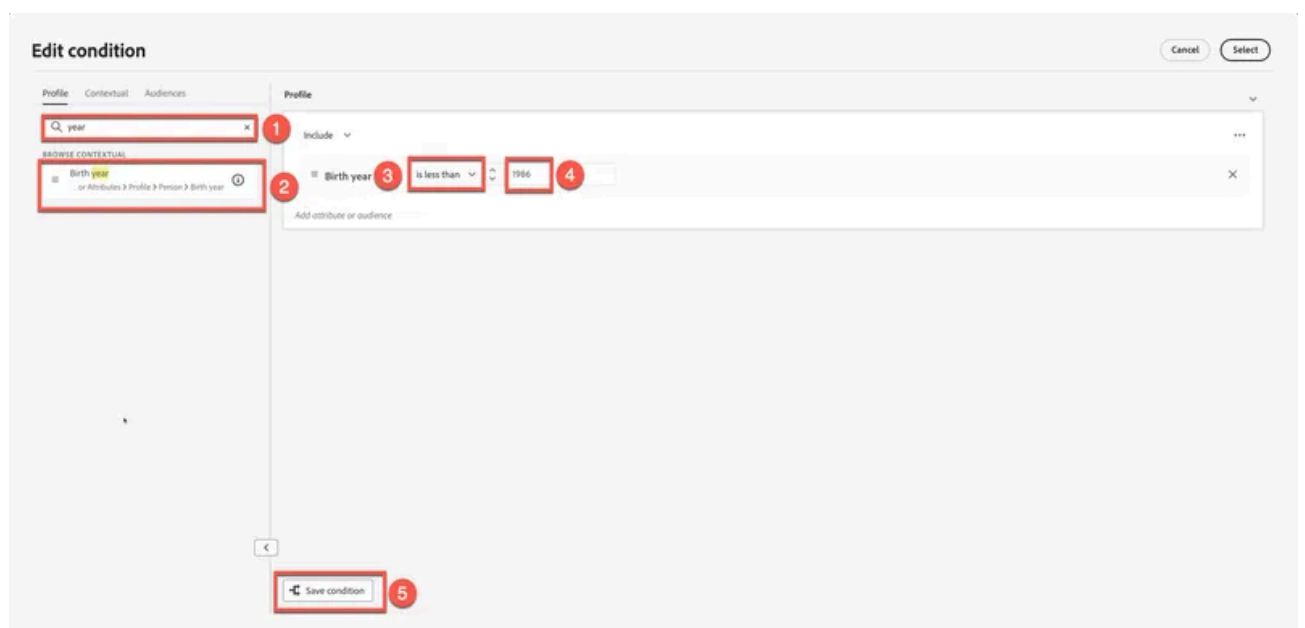


4. Search for **year** in the attribute list.

5. Drag **Birth Year** into the canvas.

6. Set condition to:

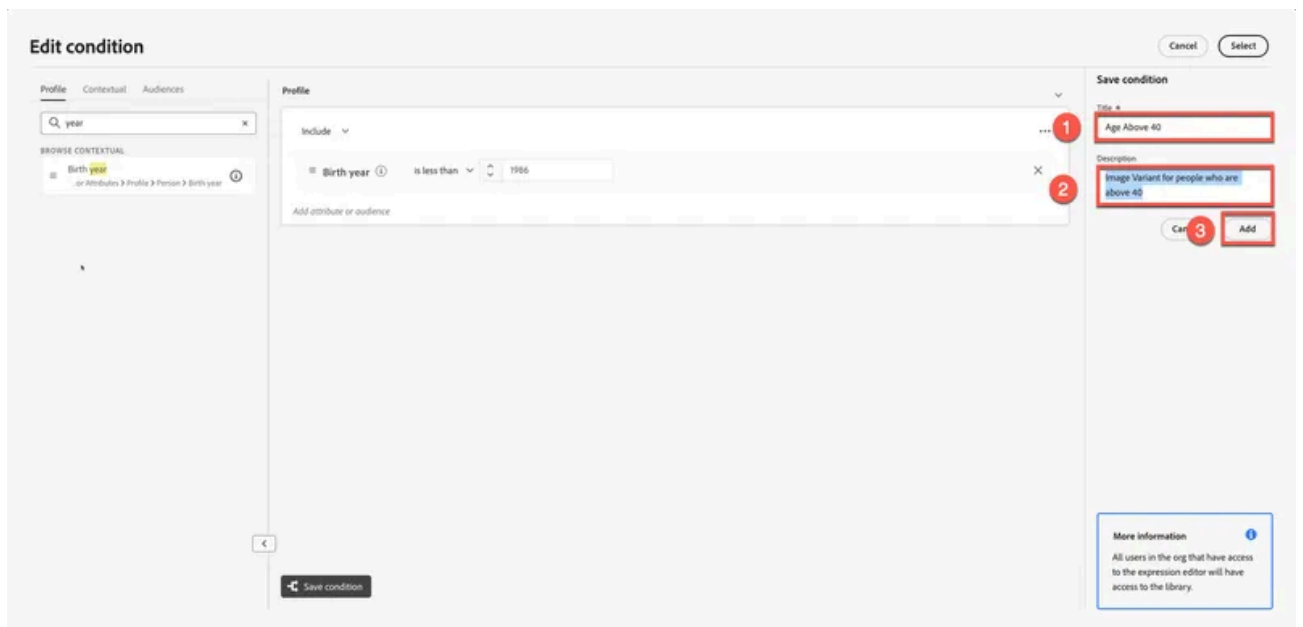
- **birthYear < 1986**



7. Name the condition: **Age Above 40**

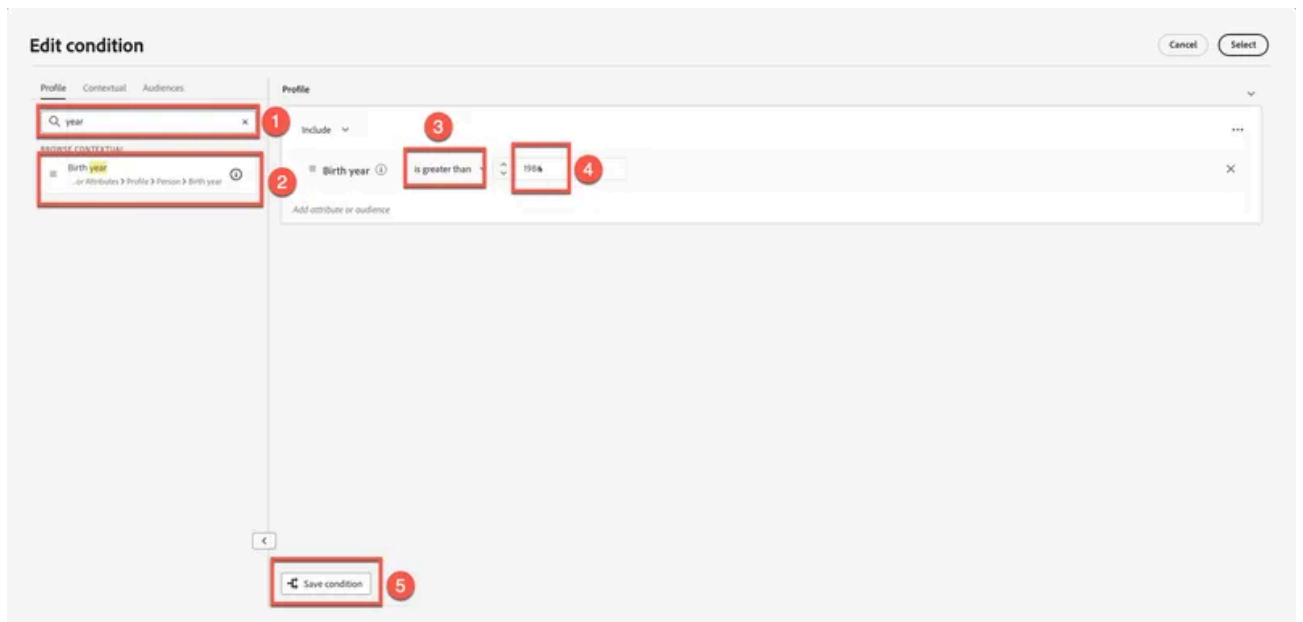
8. Add a description - "Image Variant for people who are above 40"

9. Click **Add → Select**.

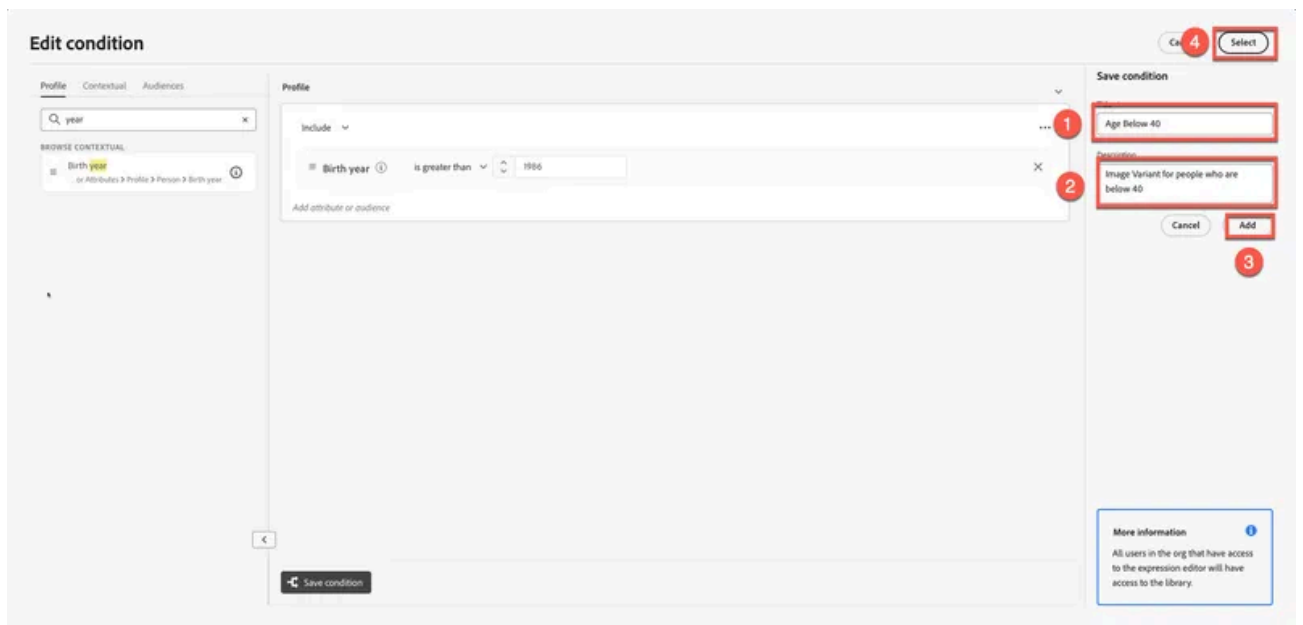


Logic for "Age Below 40"

1. Select and hover **Age below 40** section.
2. Repeat the steps but change the logic to:
 - o **birthYear >= 1986**



3. Name the condition: **Age Below 40**
4. Add description. **"Image Variant for people who are below 40"**
5. Click **Add → Select**.

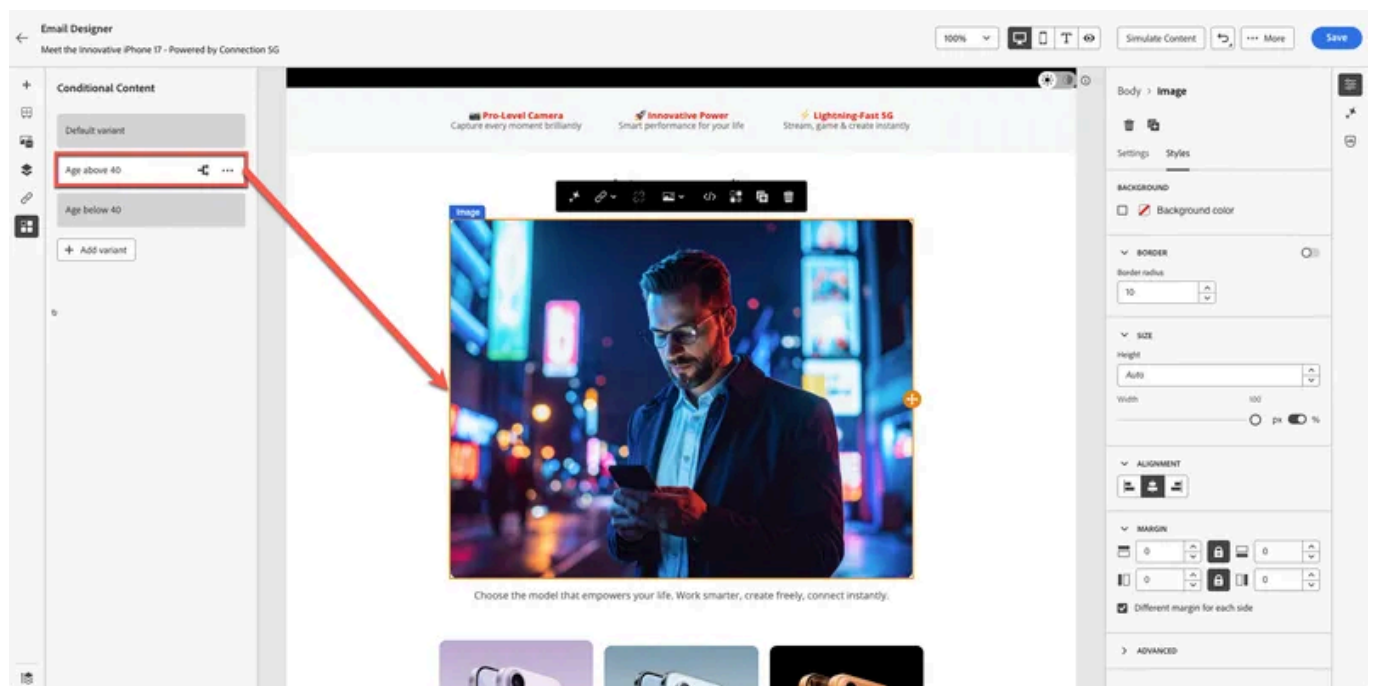


Validate Variant Switching

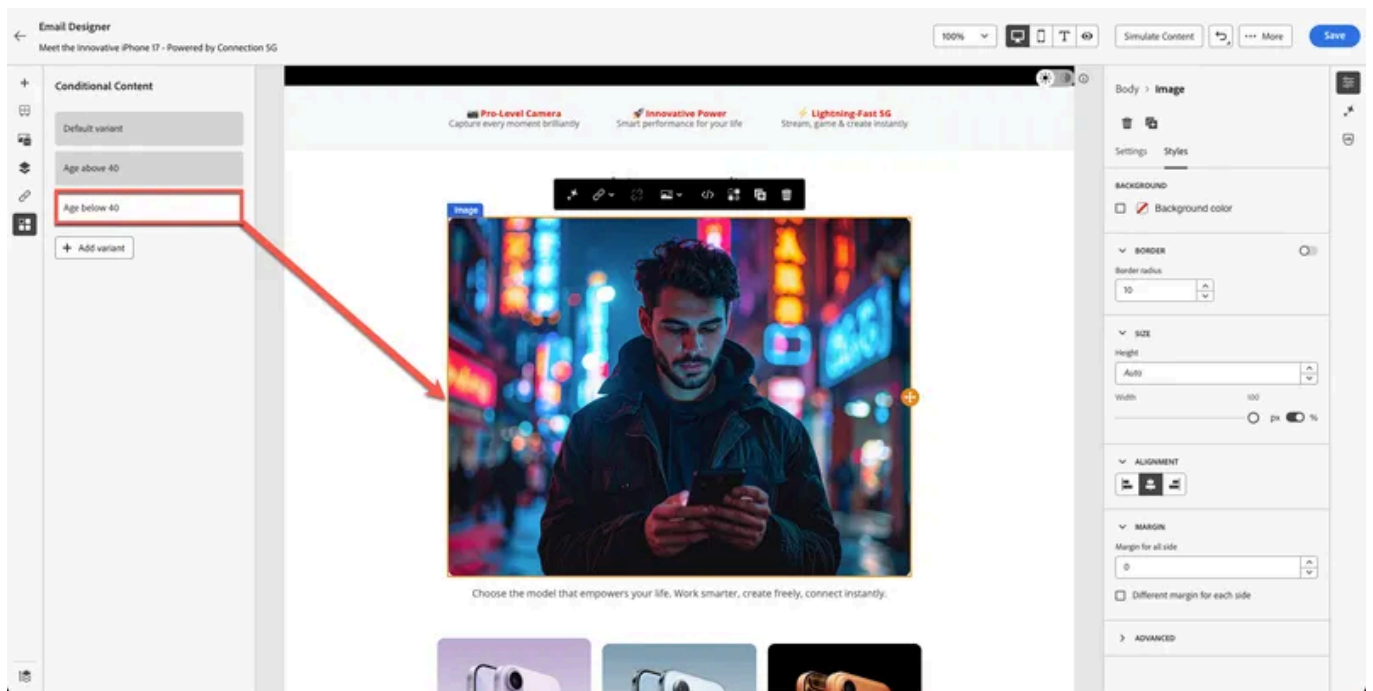
Toggle between both variants to ensure:

- Correct images appear
- Logic is correctly applied
- No variant is showing as "No condition applied"

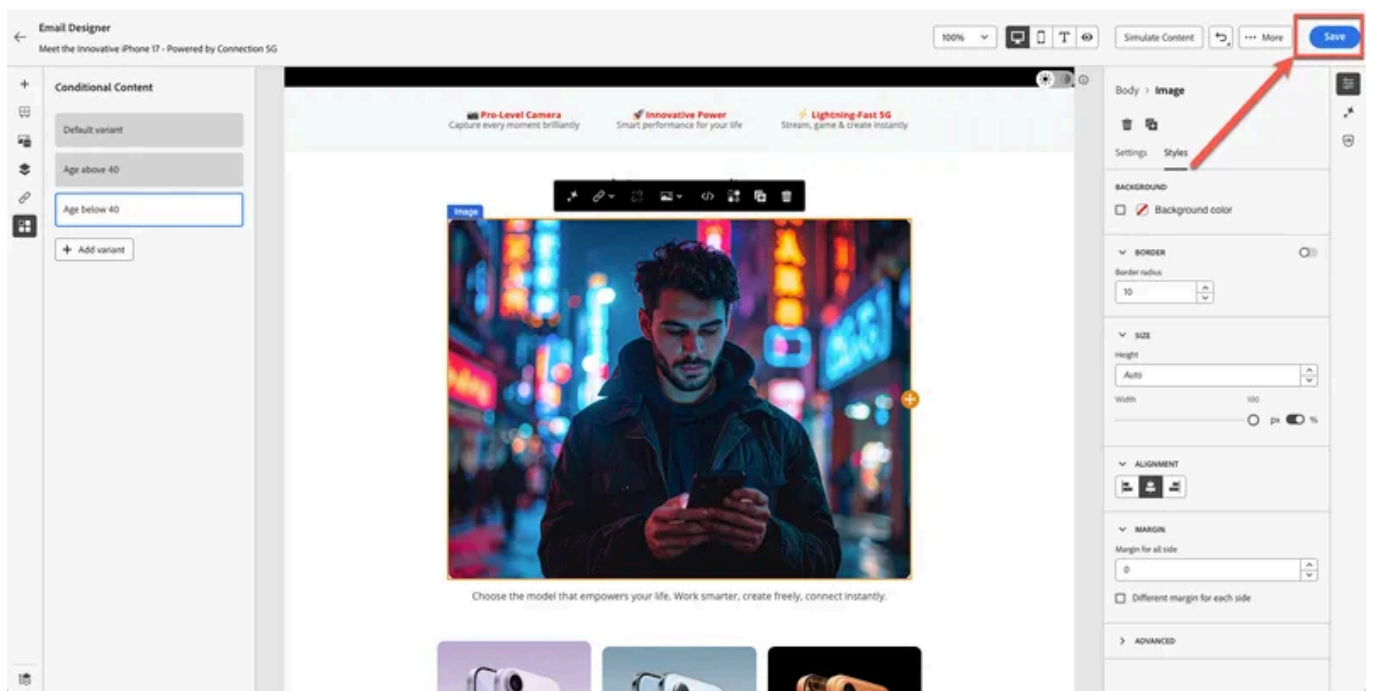
Variant: **Age above 40**



Variant: Age below 40



Click "**Save**" button to save the email.



Recap

In this module, you successfully learned how to:

- Add personalisation fields for one-to-one messaging
- Build dynamic image variants
- Apply conditional rules based on age

You are now ready for next module - **Simulation**, to test both variants

7.8. Content Simulation

Purpose: Validate personalisation, conditional logic, and content variants using Adobe Journey Optimizer's Simulation and Proof tools.

Learning Objectives

By the end of this module, you will be able to:

1. Upload and use test profile data for simulation.
2. Validate personalised fields and variant logic.
3. Test fallback behaviour for missing or unmatched data.

Introduction

In this final module, you will test your email with **two conditional variants** using the Simulation tool in Adobe Journey Optimizer.

This allows you to preview how different customers will experience your personalised message, ensuring accuracy before launching the campaign.

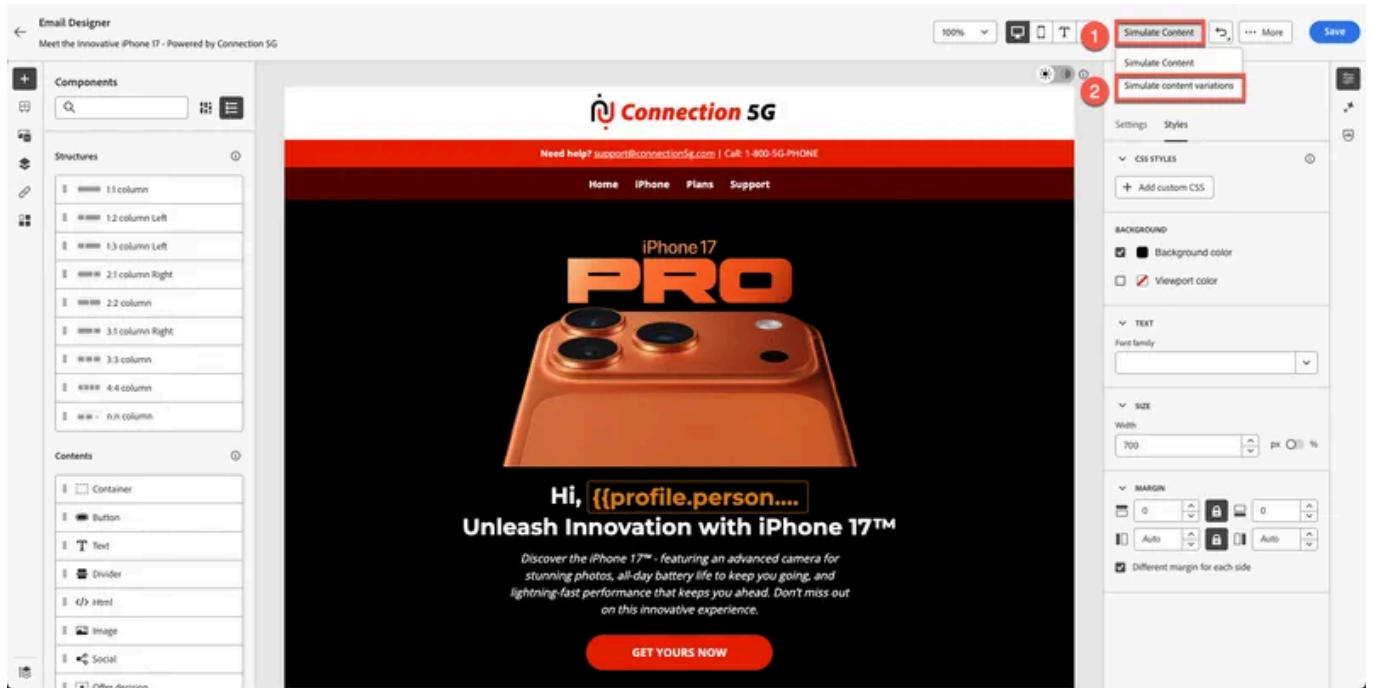
You will use the sample test profile file **sample.csv** from your toolkit.

	A	B	C	D	E	
1	person.birthYear	person.name.firstName	person.name.lastName			
2	1975	Alex	Dixson			
3	2005	Jason	Simpson			
4						
5						
6						
7						
8						
9						
10						
11						
12						

Open the Simulation Tool

1. Open your completed email.

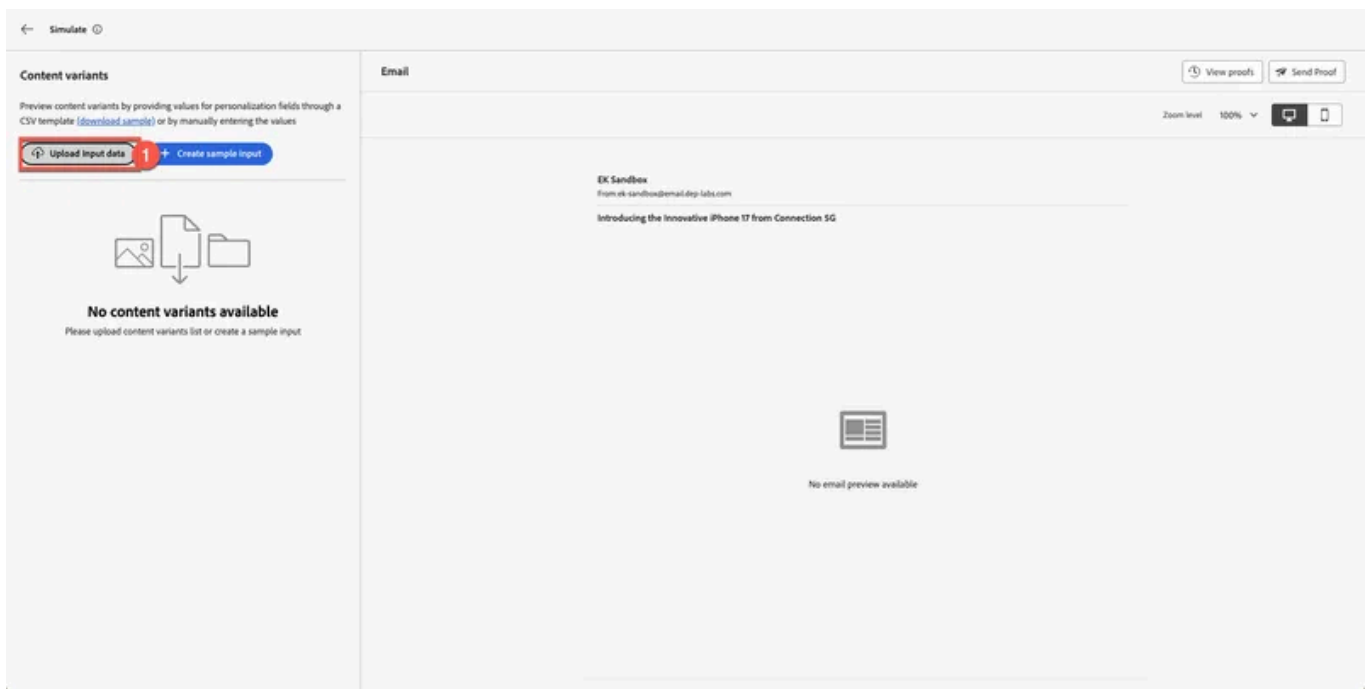
2. Click **Simulate Content**.
3. Select **Simulate content variation**.



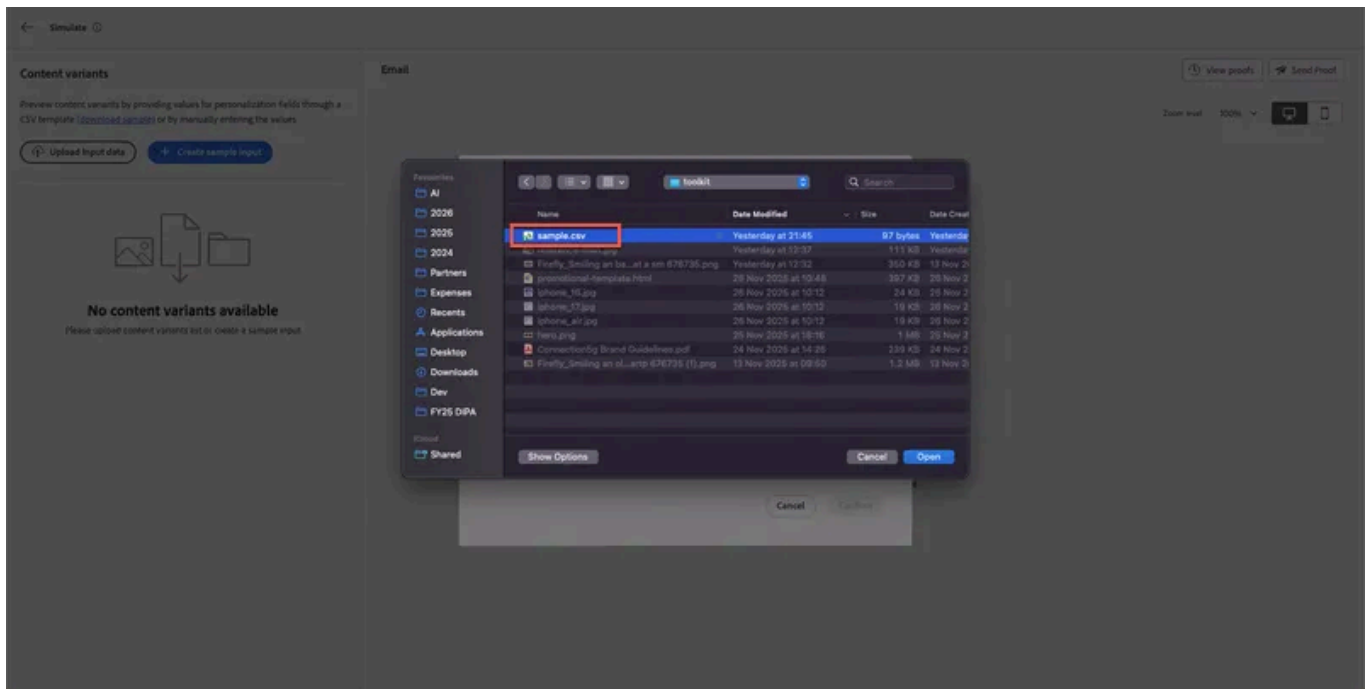
A simulation panel will open after few seconds.

Upload the Test Profile Data

1. Open **sample.csv** from your toolkit folder.
 - **Alex** → Above 40 years old
 - **Jason** → Below 40 years old
2. Click **Upload Input Data**.



3. Choose **sample.csv** and click **Continue**.



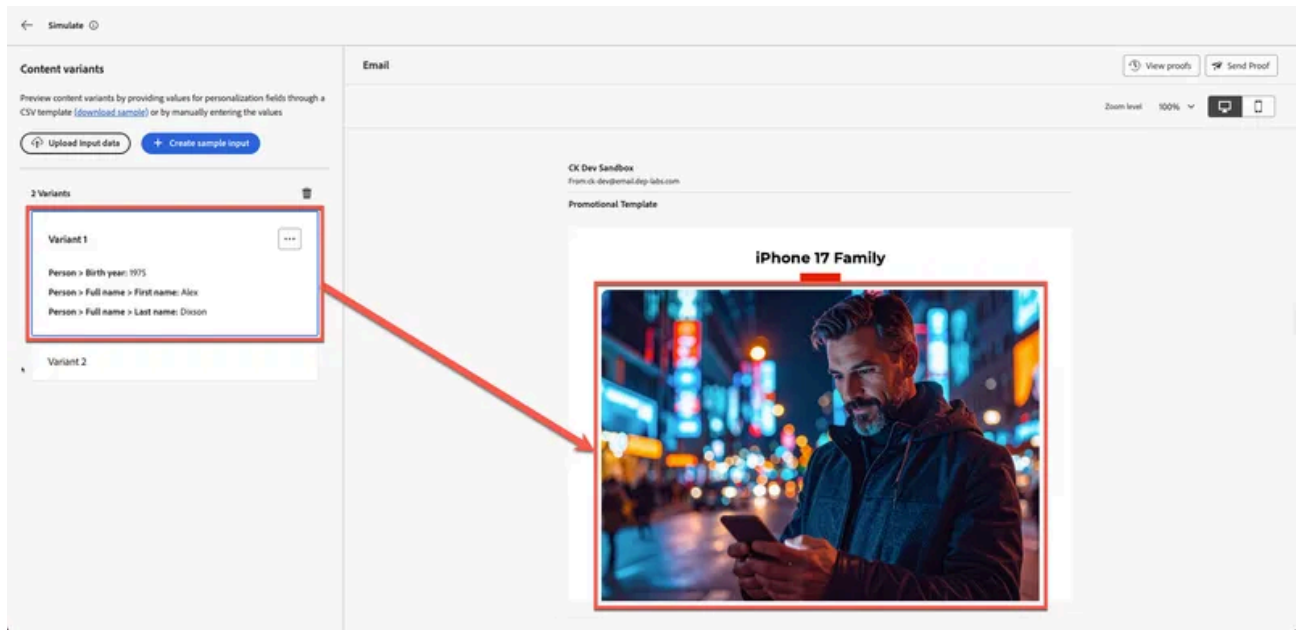
AJO processes the file and prepares previews.

Review Variant Rendering

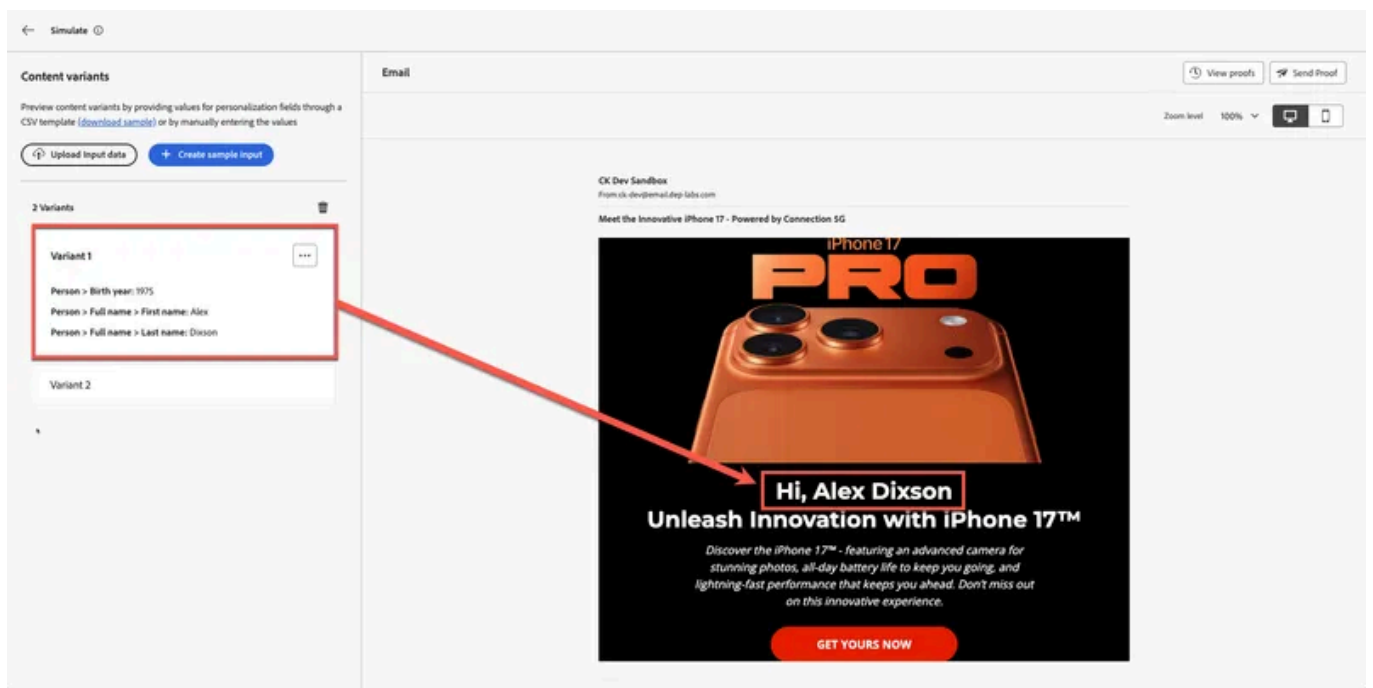
AJO will show both variants side by side based on the uploaded profiles.

Expected outcomes:

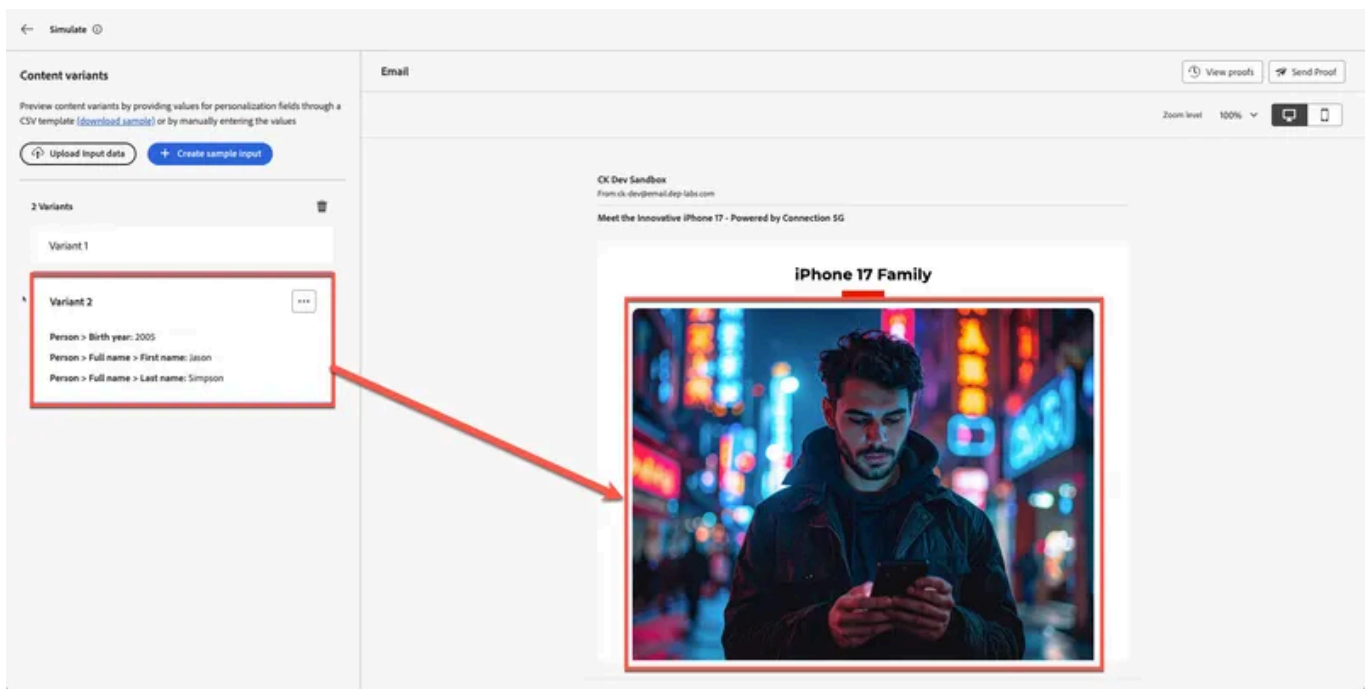
- **Alex** → Sees **Variant 1** (Age above 40)



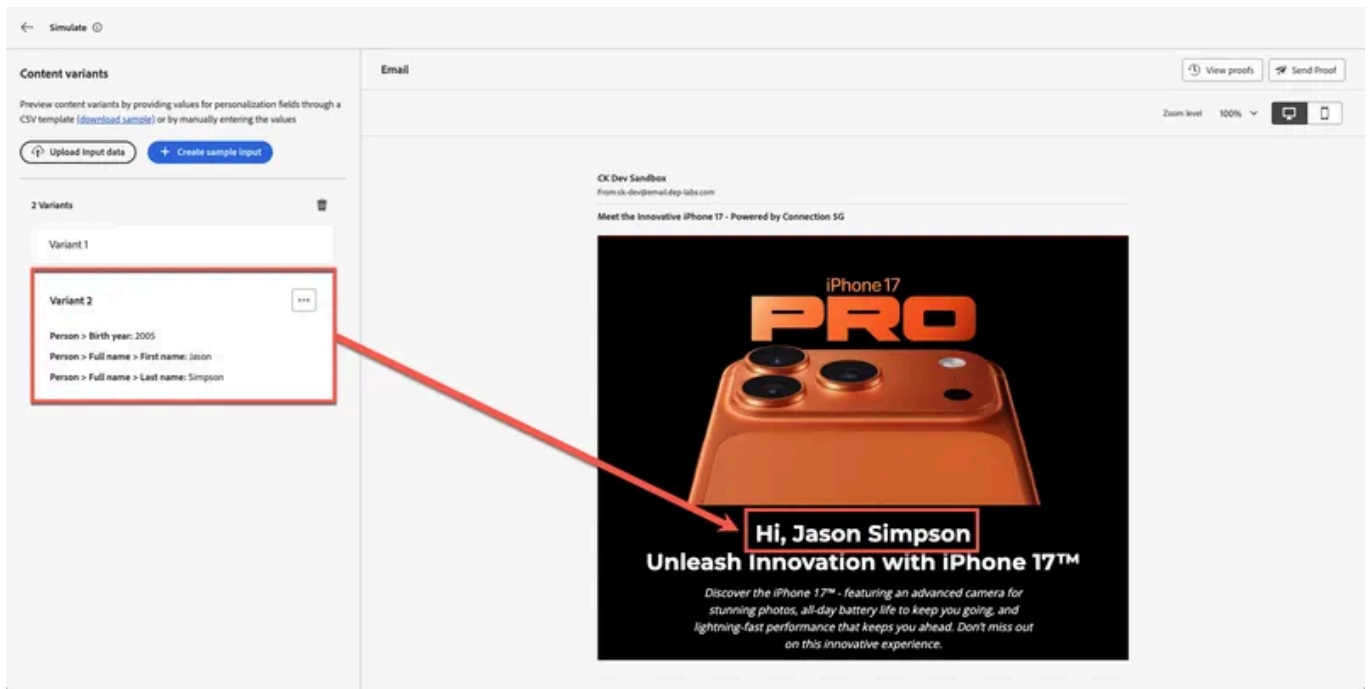
If you scroll up you wil also see personalised fields with name now as you can see below.



- **Jason** → Sees **Variant 2** (Age below 40)



With Jason's full name as well. How cool is that!



Validate Fallback Behaviour

Fallbacks and Defaults: Check that your email handles any missing data or no-match scenarios gracefully. For example, simulate a profile with an empty birth year field or one that doesn't qualify for any targeted offer. The preview should either show a default

content block or a sensible placeholder instead of broken or empty content. If your simulation shows an empty section where content should be, that indicates you may need to configure a fallback offer or default text in your design.

Recap

In this module, you successfully:

- Simulated personalised content using sample profiles
- Validated variant switching logic
- Confirmed personalised fields populate correctly

You are now ready for next module - **Brand Alignment**, where you will evaluate your email against Connection 5G brand guidelines using AI.

7.9. Brand Alignment

Purpose: Learn how to use Adobe Journey Optimizer's Brand Alignment feature to evaluate email content, identify guideline violations, and apply AI-powered recommendations to improve brand compliance.

Learning Objectives

By the end of this module, you will be able to:

1. Access and interpret the Brand Alignment panel.
2. Evaluate email content against brand guidelines.
3. Identify issues flagged by AI.
4. Apply suggestions to improve brand alignment.
5. Re-evaluate scores to track improvements.

Introduction

Adobe Journey Optimizer includes an **AI-driven Brand Alignment Score** that checks your content against the published brand guidelines for **Connection 5G**.

This ensures:

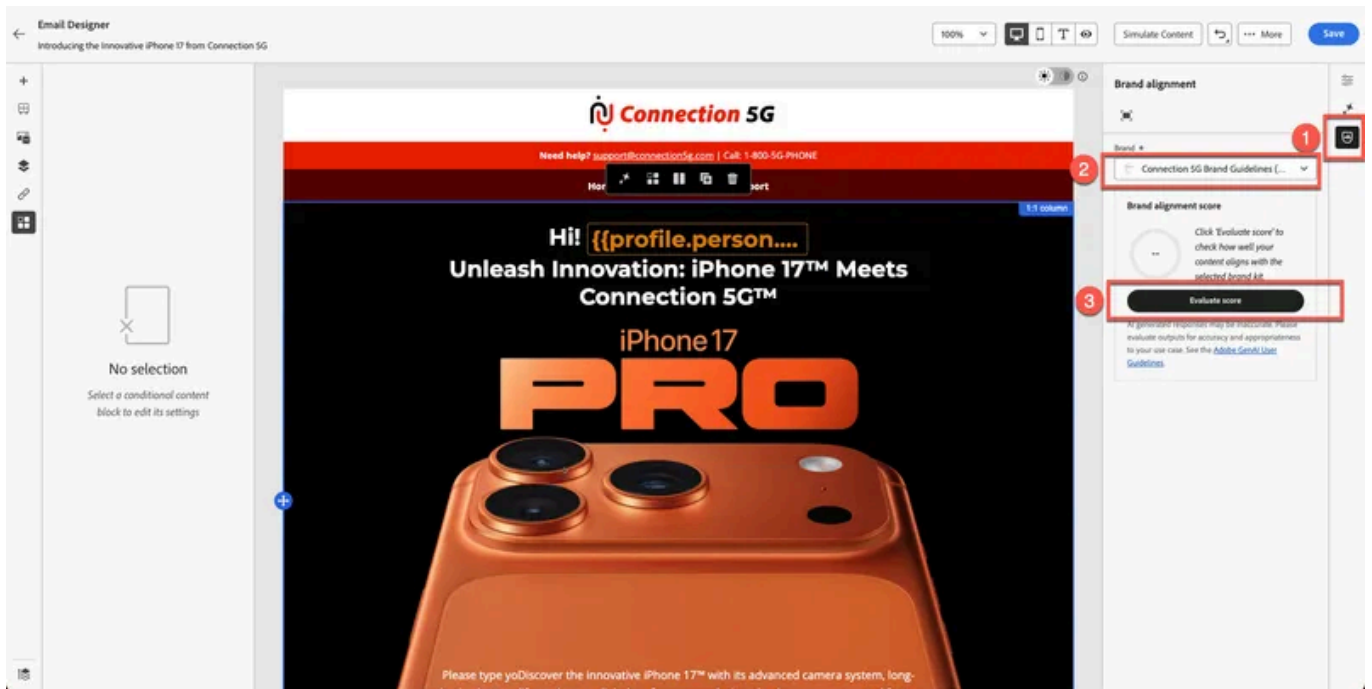
- Tone, style, and messaging match your brand
- Legal requirements are met
- Images follow visual rules
- Content creators stay consistent at scale

This module teaches you to run the evaluation, interpret results, and improve your content using AI.

Open Brand Alignment Panel

1. Open the email you created in the previous modules.
2. Locate the **Brand Alignment** tab in the right rail or the **% icon** in the sidebar.

3. Click to open the panel.



4. Ensure the correct brand is applied:

- **Connection 5G** (default).

5. Click **Evaluate Score**.

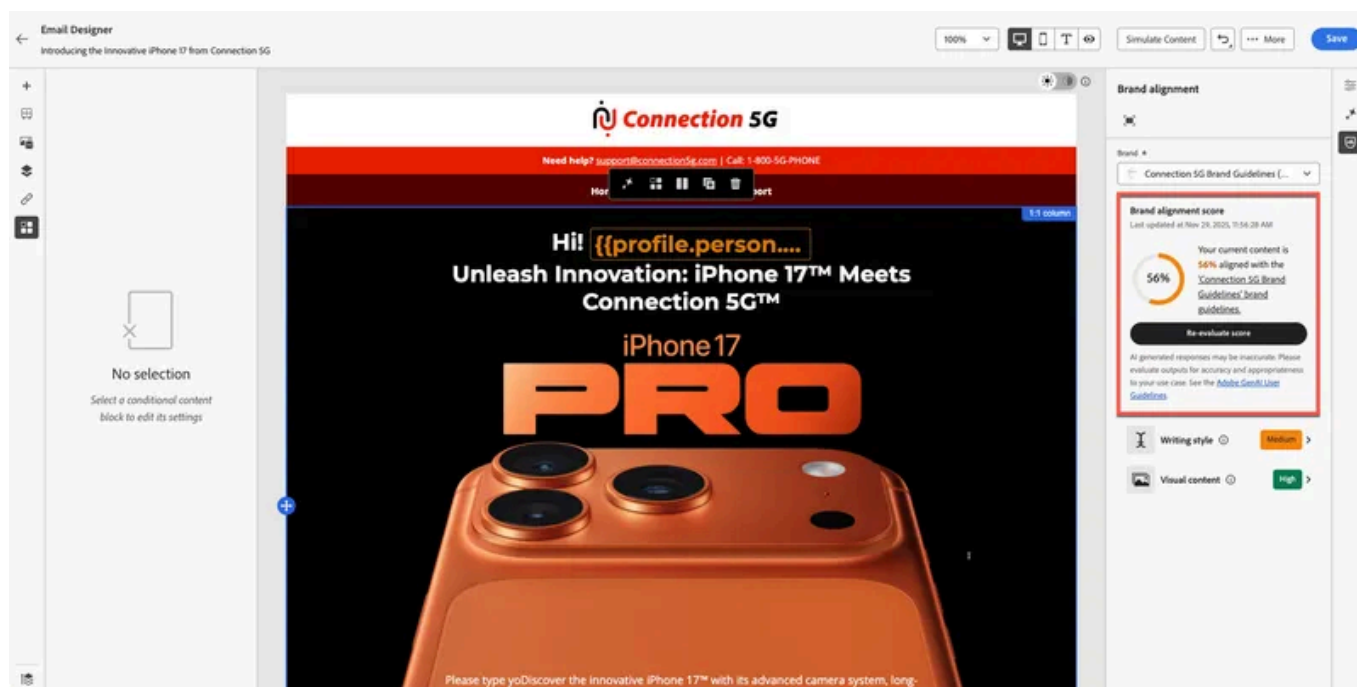
Interpret the Brand Score and feedback: After a moment, you will see the Brand Compliance Score for your content. This score may be presented as a rating (e.g. High, Medium, or Low) or a percentage, along with a color indicator (green, yellow, red) and the time of evaluation. A High score means your content strongly aligns with the brand guidelines, whereas a medium or low score indicates moderate or poor alignment.

Review the detailed feedback provided in the panel for each category of guidelines.

The feedback is typically organized by guideline categories (such as tone, style, imagery, etc.), showing which rules passed and which might need attention.

Take note of any specific messages or highlights – for example, the panel might say certain words or phrases don't match the prescribed tone, or an image doesn't meet a visual standard. This is your cue on what to improve.

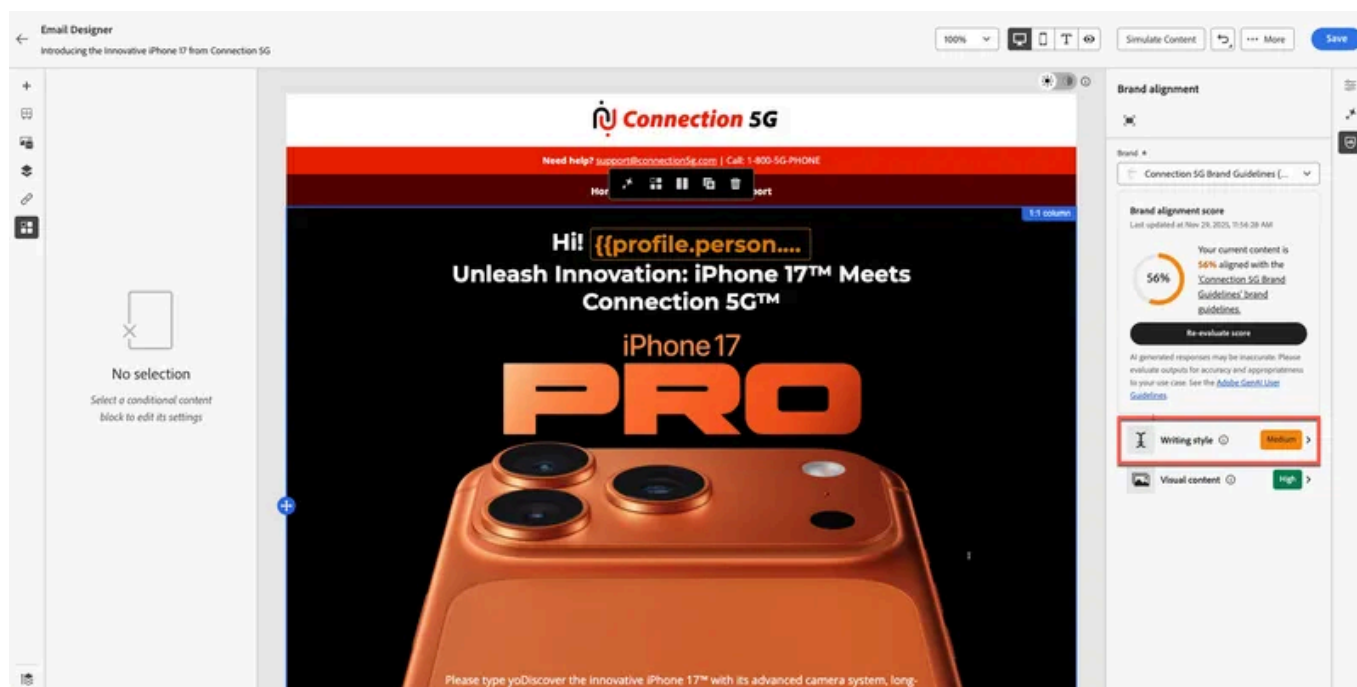
Note that your score will be different from screen below. Your goal is to improve the score using the brand guidelines and AI.



Review the Alignment Score

After evaluation, AJO displays:

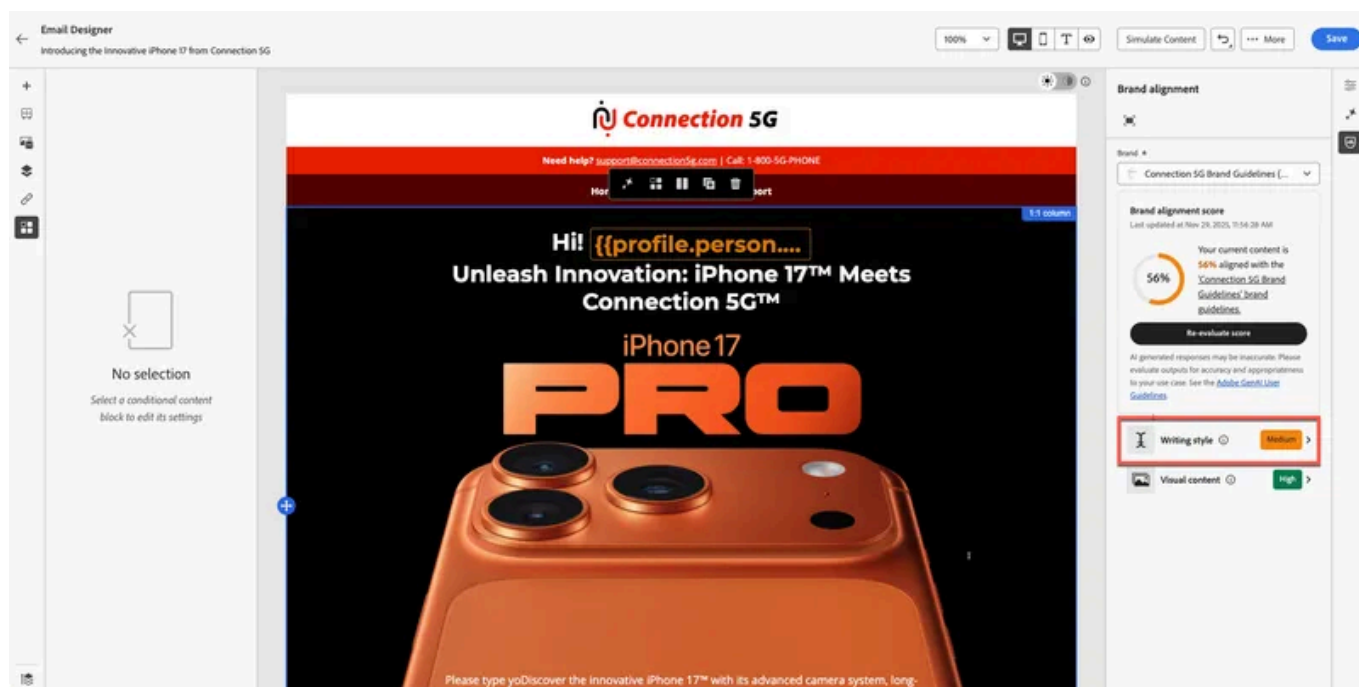
- Brand Alignment Score
- Rating (High / Medium / Low)
- Colour indicator (Green / Yellow / Red)
- Timestamp
- Guideline categories (Tone, Style, Imagery, etc.)



Interpret the results to understand how closely your email matches Connection 5G guidelines.

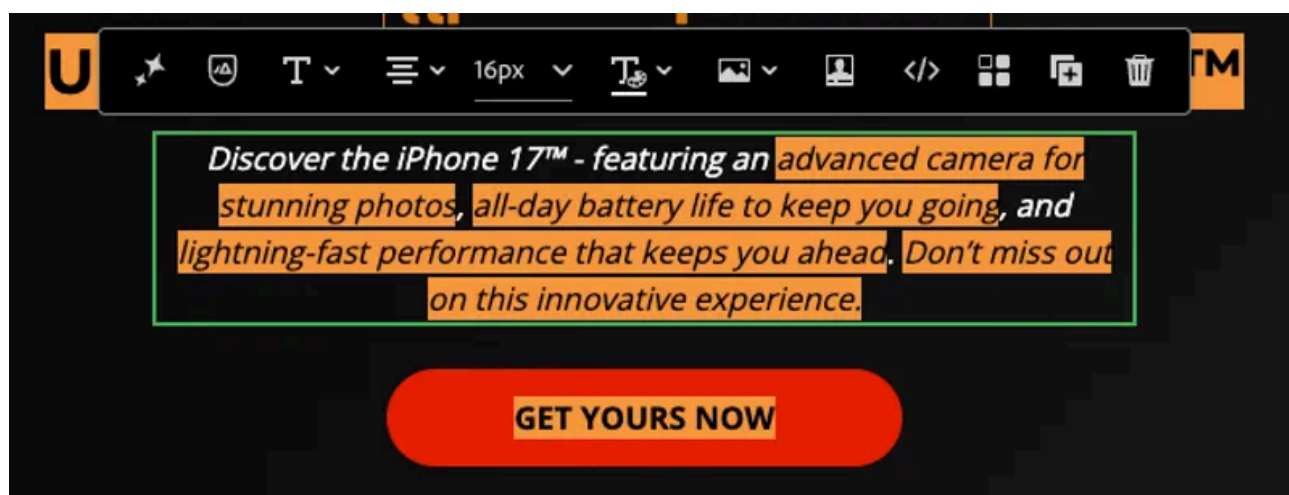
Examine Detailed Feedback

1. Scroll through the guideline categories.
2. Look for warnings or red indicators.
3. Click each flagged guideline to open detailed AI feedback.
4. Review suggestions, such as:
 - Tone mismatch
 - Incorrect phrasing
 - Prohibited words
 - Missing trademark usage
 - Image style violations

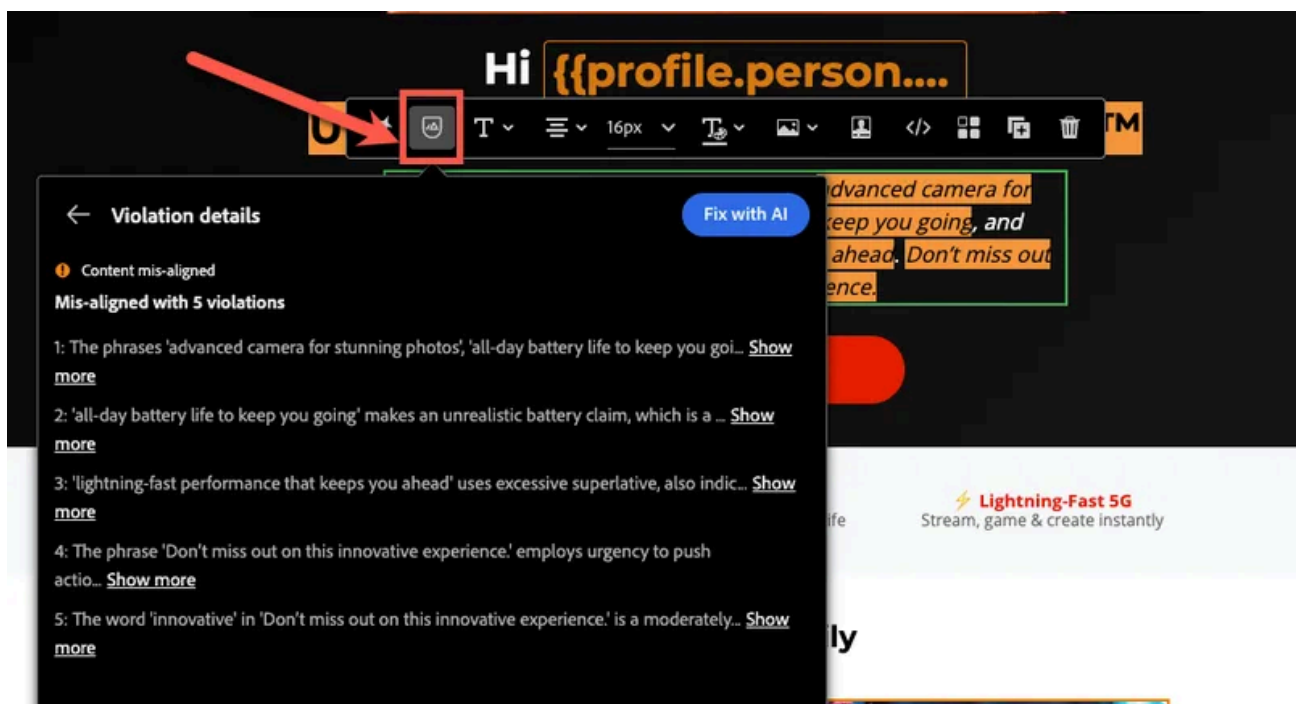


Apply AI Recommendations

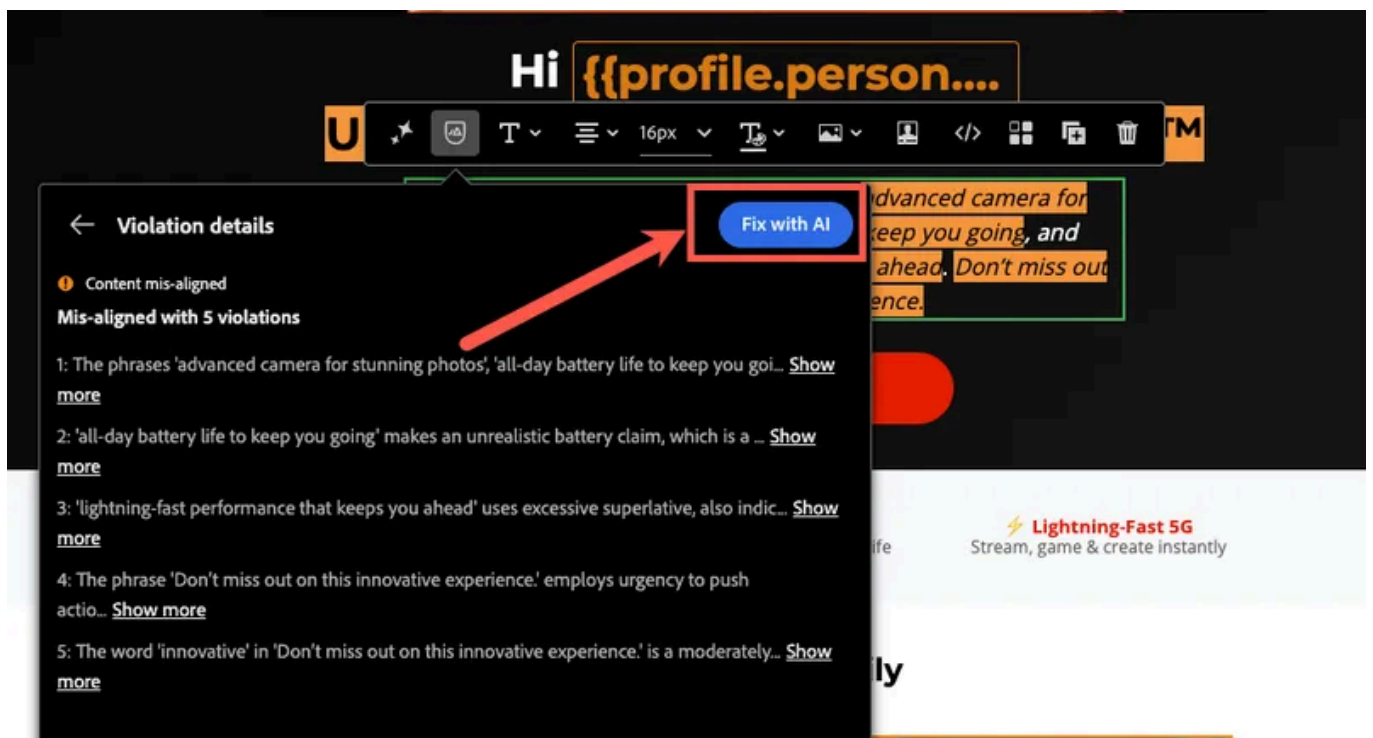
1. Click into flagged text blocks or images within the email.
2. Lets use the paragraph we pasted in previous exercise as shown below.



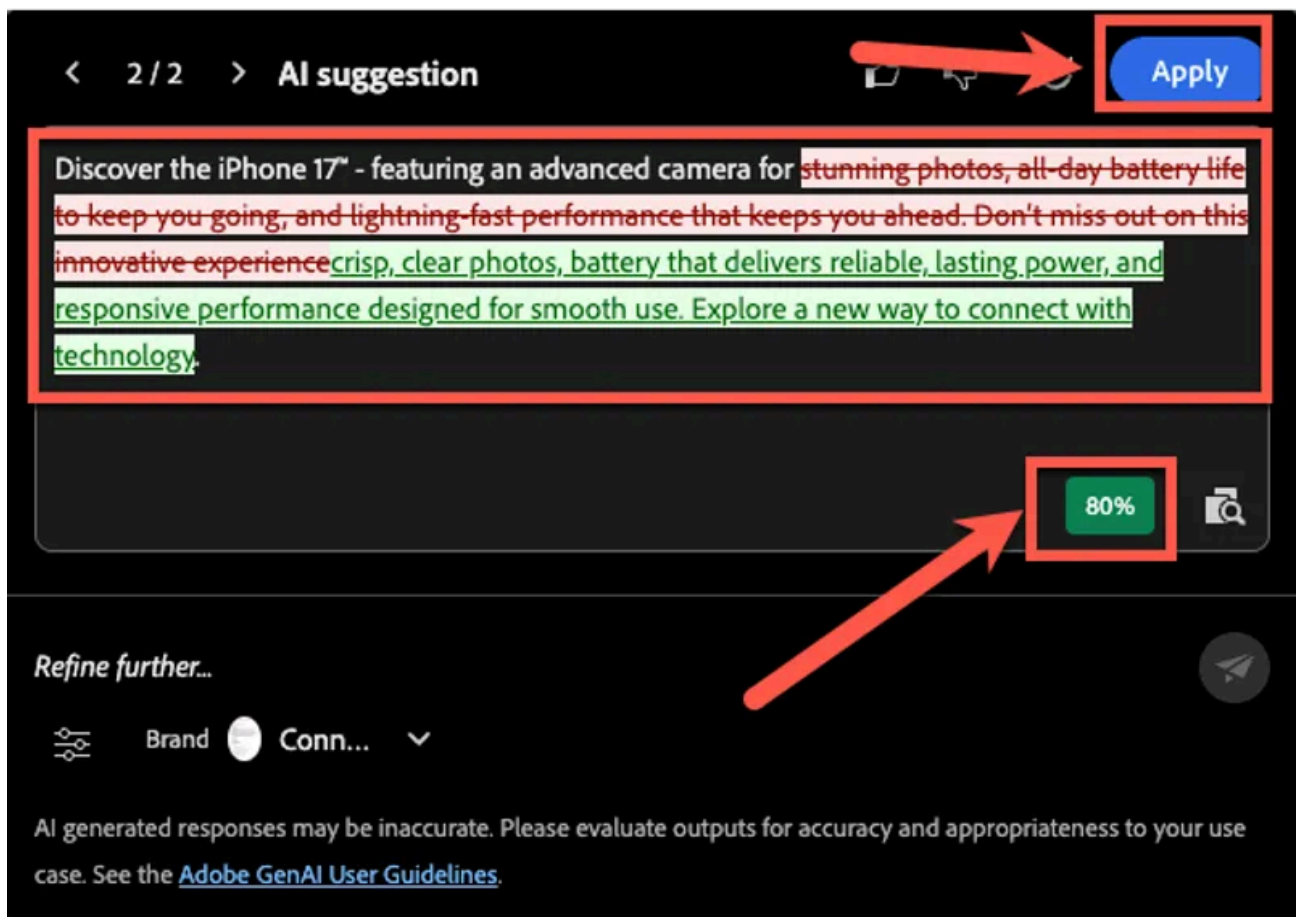
3. Use the suggested modifications provided by AI. Click on icon as shown below.



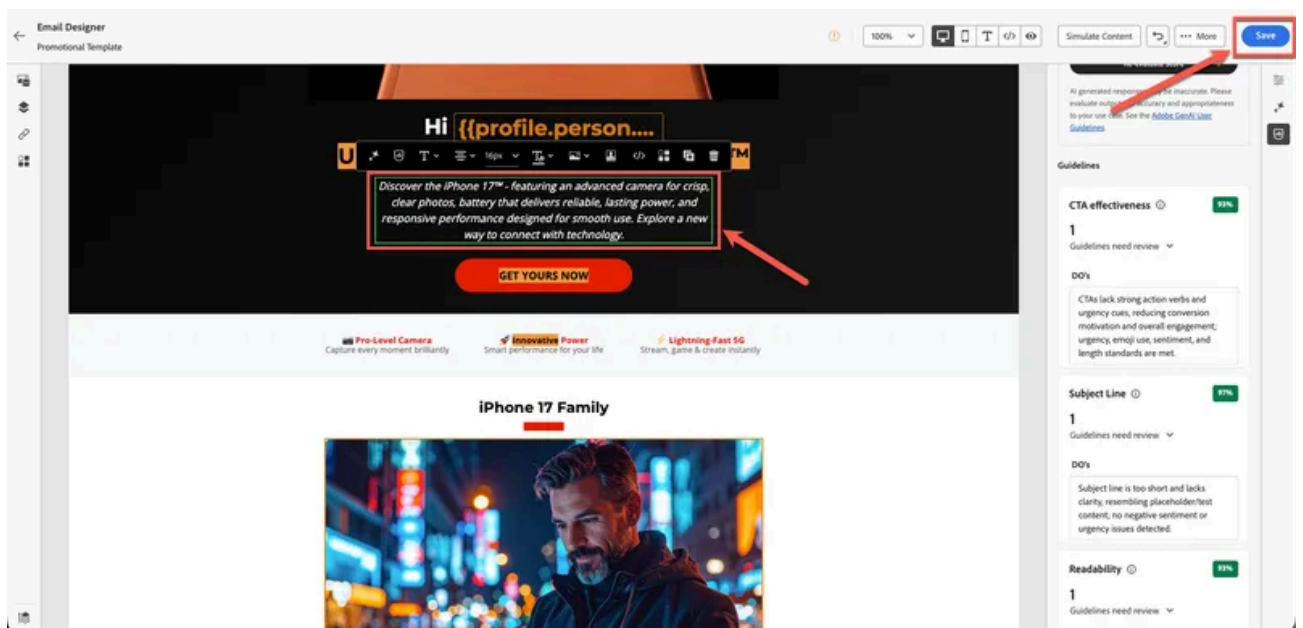
4. Click on Fix with AI buton as shown below.



4. You will see suggested changes highlighted in green, and removed text shown in red with strikethrough, as illustrated below. You will also notice that the score has been updated (in our case, it is 80%). Click the **Apply** button for the changes to take effect.

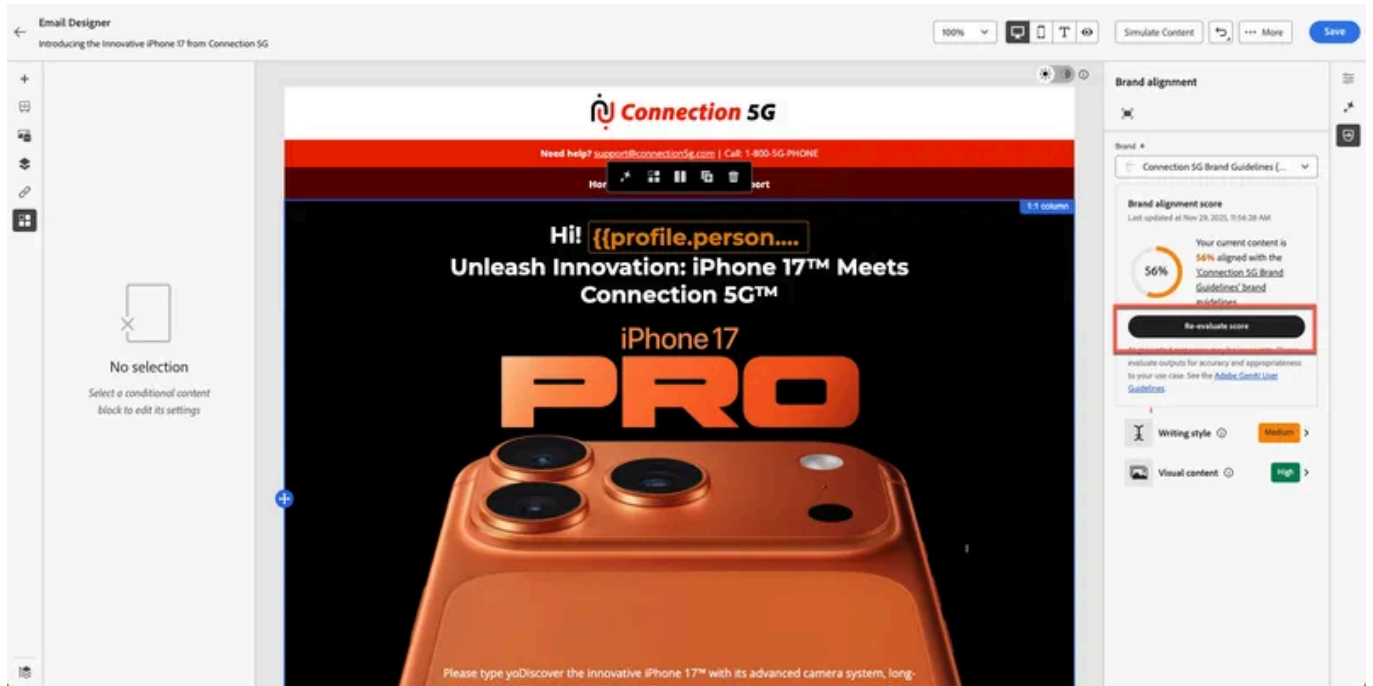


5. Changes will be applied with new text.
6. Review all highlighted areas and make the necessary updates to correct the content, either using AI or by editing manually. Ensure that all required changes are completed before proceeding.
7. Save changes.



Re-evaluate the Brand Score

1. Make changes to all location to fix the content using AI or manually.
2. Return to the Brand Alignment panel.
3. Click **Re-evaluate Score**.
4. Compare the new score to the previous one.

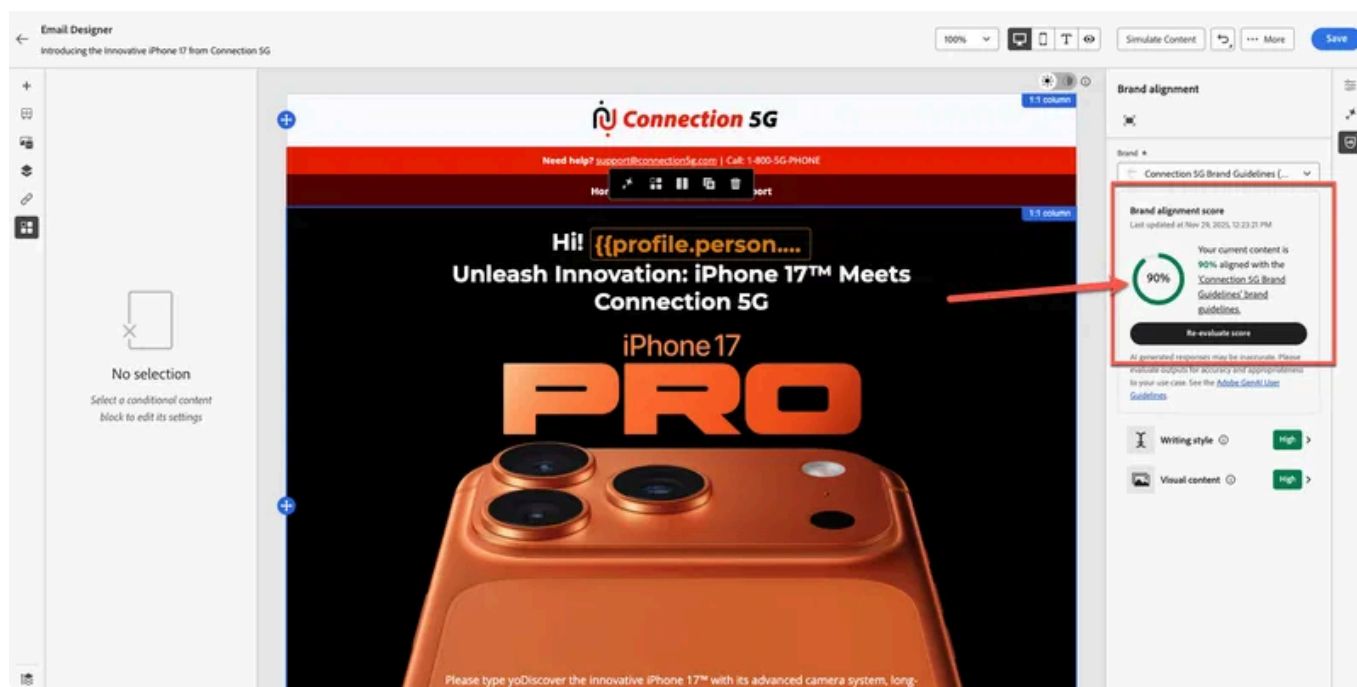


For example:

- Original score: **56%**
- Updated score: **90%**

This indicates your updates successfully aligned the email with brand standards.

4. Click **Save** to finalise your email.



Recap

In this module, you learned to:

- Evaluate an email using the Brand Alignment Score
- Interpret category-level feedback
- Identify writing, tone, and layout issues
- Apply AI-recommended corrections
- Improve brand consistency across your communication

Your content is now validated and ready for testing in next module - **Test Email**.

7.10. Test the Email

Learning Objectives

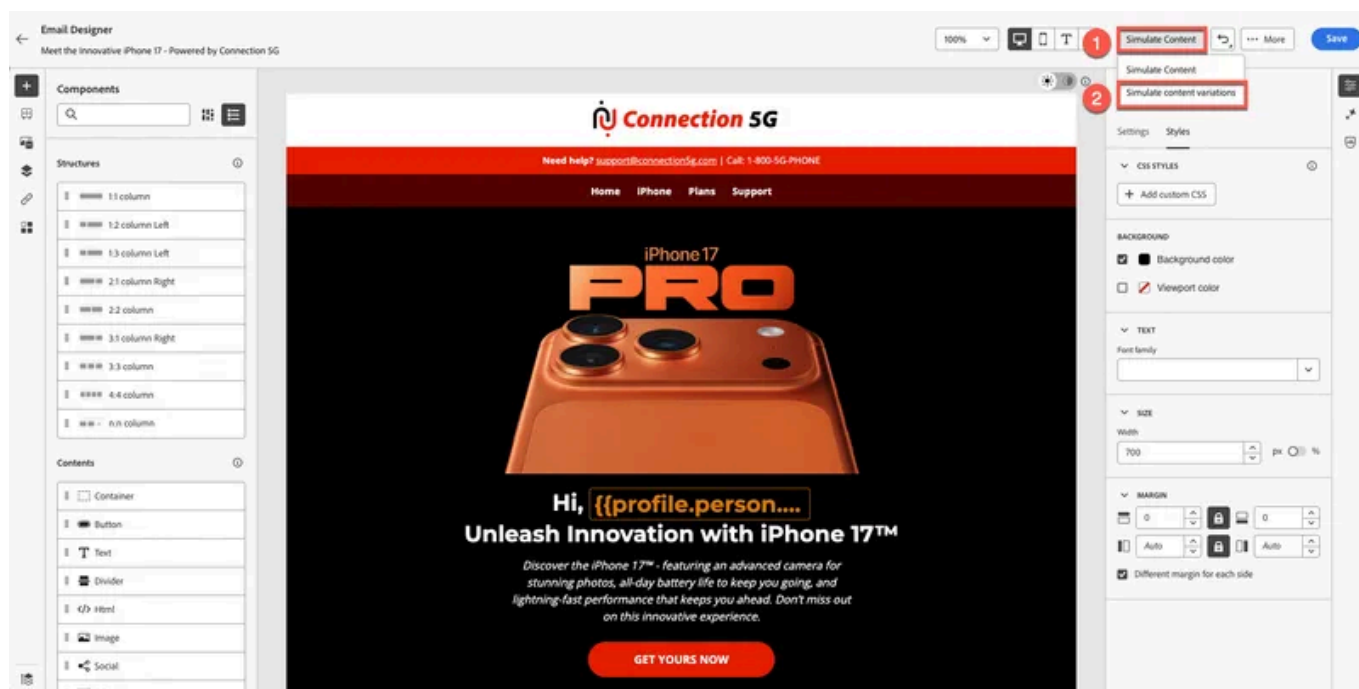
By the end of this module, you will be able to:

- Send proof emails from the Adobe Journey Optimizer email editor.
- Validate personalized content and conditional variants using proof emails.
- Verify proof email delivery in your inbox, including handling spam and clipped messages.
- Review proof delivery logs, timestamps, and variants within Adobe Journey Optimizer.
- Confirm that email content is accurate, personalized, and ready for activation.

Send Proof Emails (Optional, but recommended)

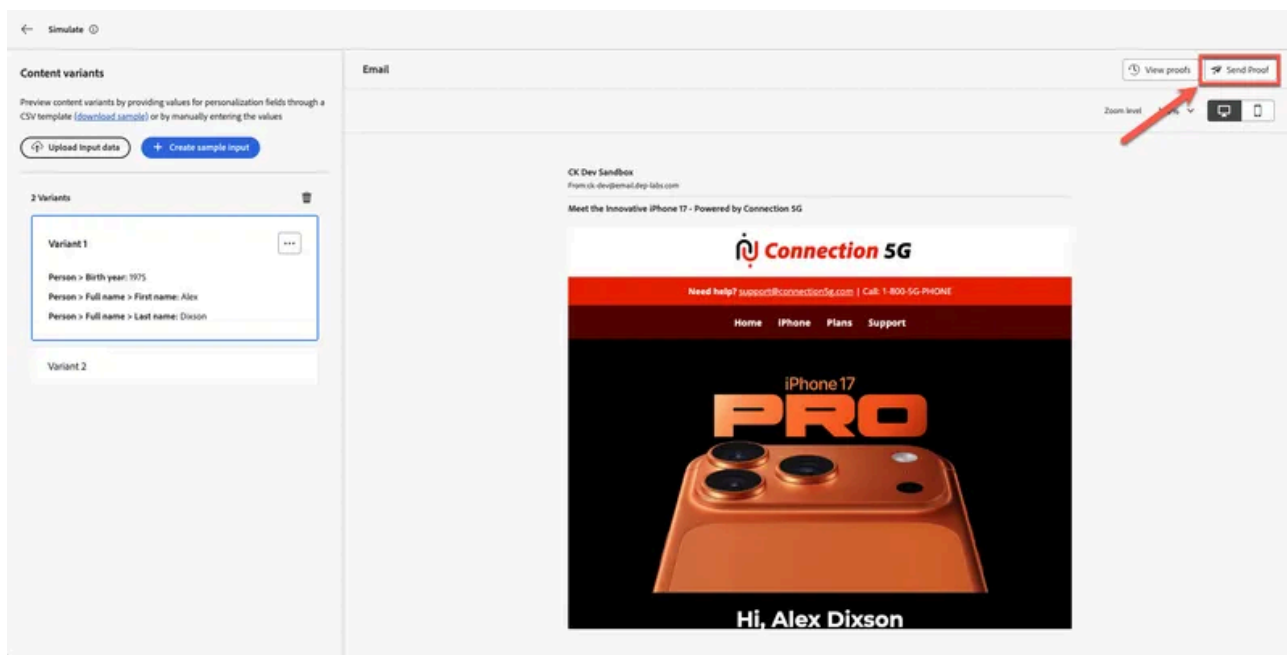
At this point, you have learned that we can not only personalize the profile attributes but also use attributes to create conditional logic that would determine the content you want to show. Adobe Journey Optimizer is extremely powerful and gives marketers a lot of flexibility.

1. Click **Simulate Content**.
2. Select **Simulate content variation**.



A simulation panel will open.

3. Click **Send Proof**.



2. Add your own personal email address.

Note that at times your corporate email will block emails from the sandbox. I would recommend you to use your personal email.

1. Select both variants.

2. Add Subject Line Prefix

1. Variant 1: Above 40

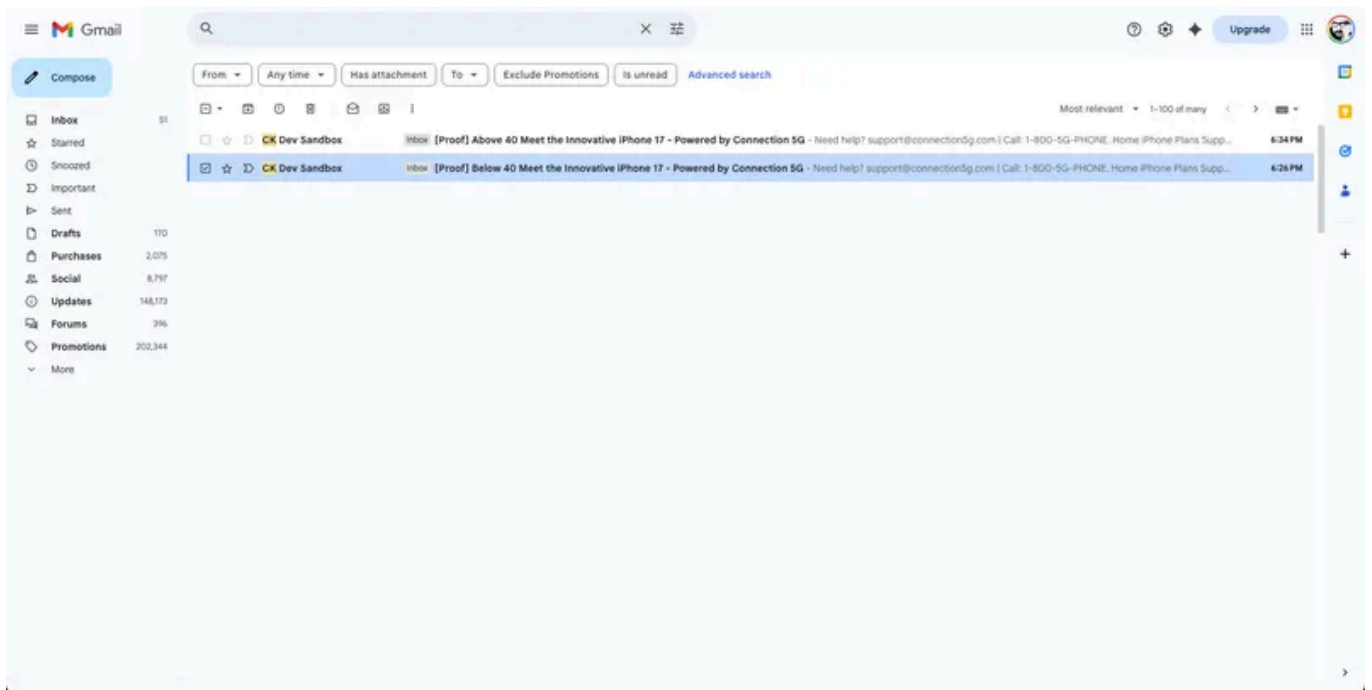
2. Variant 2: Below 40

3. Click **Send Proof**. You will get green confirmation message "**Proofs sent successfully**"

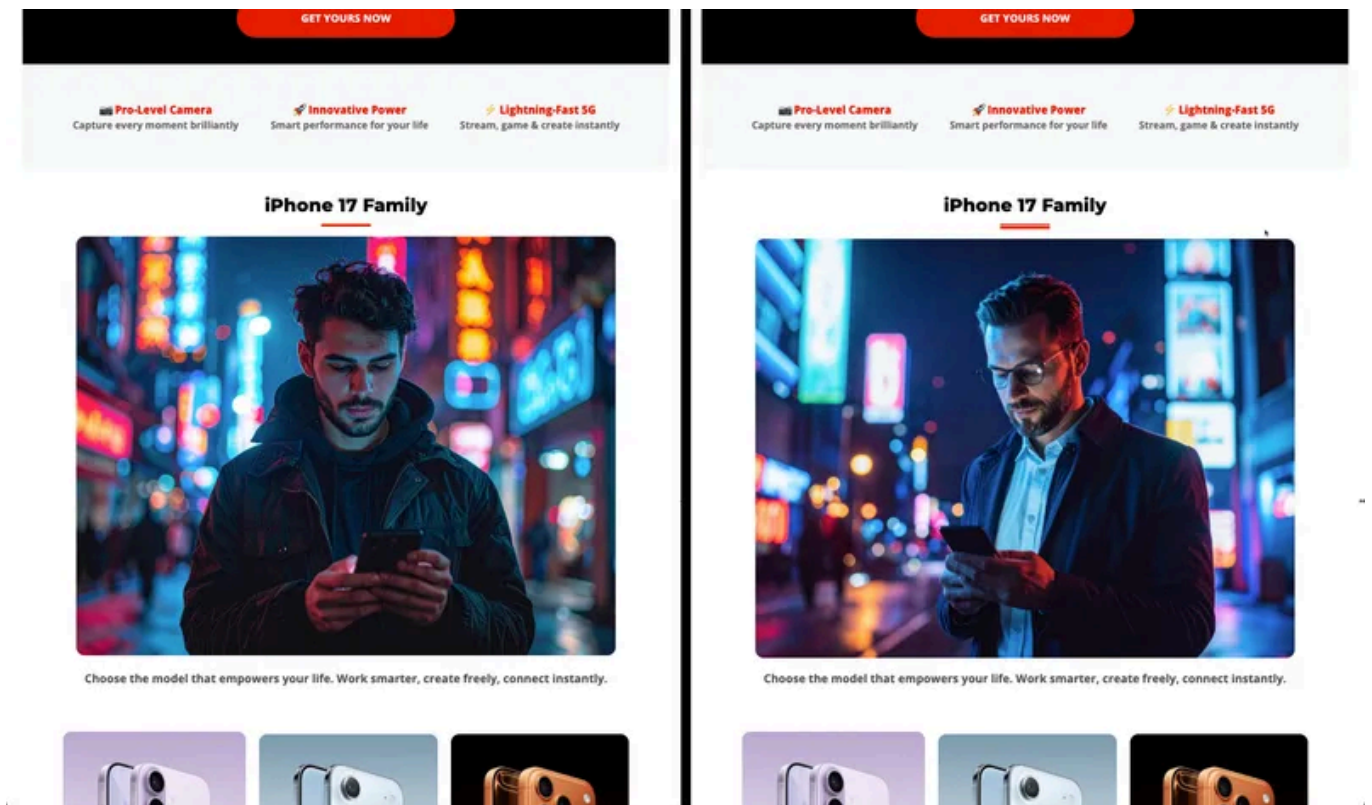
The screenshot shows a 'Send Proof' interface within a simulation environment. The interface is titled 'Send Proof' and has a 'Close' button with a red '3' and a 'Send Proof' button. Below the title, there is a section 'Choose recipient' with a subtext 'You can send proof emails to yourself and your stakeholders to review what each test profile will receive'. There is a 'Recipients (0/10)' section with an 'Add recipient email' button and a list of recipients, including 'ngithia@gmail.com'. Below this is a 'Select test profiles' section with a subtext 'Select the test profiles that you want to impersonate'. There is a table with two columns: 'PROFILE NAME' and 'SUBJECT LINE PREFIX (OPTIONAL)'. The table has two rows: 'Variant 1' and 'Variant 2'. The 'Variant 1' row has a red circle with the number '1' next to it, and the 'SUBJECT LINE PREFIX (OPTIONAL)' column has a red box around the text 'Above 40'. The 'Variant 2' row has a red circle with the number '2' next to it, and the 'SUBJECT LINE PREFIX (OPTIONAL)' column has a red box around the text 'Below 40'.

Verify that you have received both email should land on your inbox.

Proof emails may land in **Spam** depending on filters.



You may experience clipped message but it is fine, since some of the footer links are not real. If you click on the link you should see both emails with variants has come through.

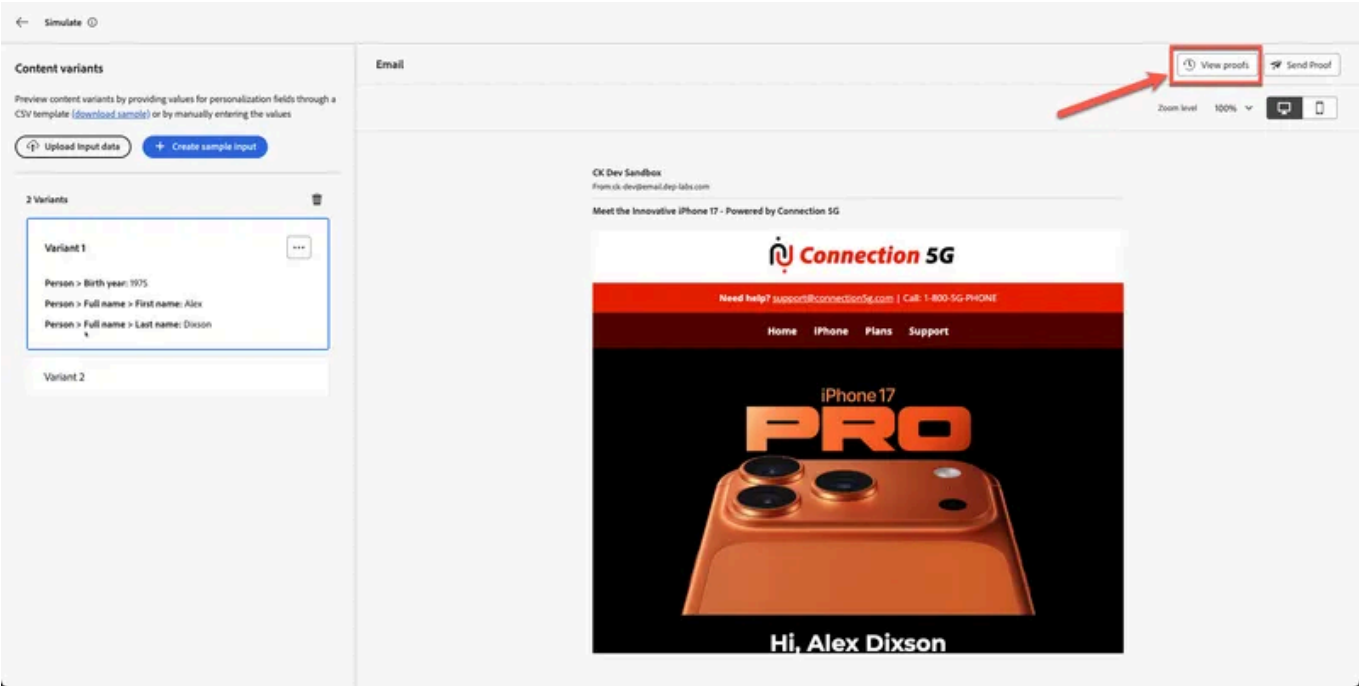


Verify Proof Delivery in AJO

1. Return to the email editor.
2. Click **View Proof**.
3. Review delivery logs, timestamps, and sent variants.

Finally, you can also see proof delivery in Adobe Journey Optimizer.

Go back to email creation screen and click on "**View Proof**"



You will notice your proof email details.

Status	Date	Targeted	Excluded	Sent	Delivered	Bounces	Opens	Clicks	Errors
Finished	1/6/2026, 6:26:23 PM	1	0	1	1	0	1	0	0
Finished	1/6/2026, 6:32:55 PM	1	0	1	1	0	0	0	0
Finished	1/6/2026, 6:34:36 PM	1	0	1	1	0	0	0	0

Recap

In this module, you successfully:

- Sent and verified proof emails in AJO

You have now completed the full Connection 5G AJO Lab Journey and validated that your email is accurate, personalised, and ready to activate.

7.11. Summary

Throughout this course, you've explored the full journey of building personalized, brand-compliant campaigns in Adobe Journey Optimizer. From creating reusable content blocks and applying AI-driven enhancements, to setting up dynamic variations and running simulations, you've gained hands-on experience with the tools that ensure your communications are both impactful and consistent. As you prepare to apply these skills in real-world scenarios, keep the following key takeaways in mind:

Key Takeaways

- You can confidently create, configure, and test branded communications in Adobe Journey Optimizer (AJO).
- Using **fragments** and **templates** streamlines content creation and ensures brand consistency across messages.
- The **AI Assistant** and **Brand Alignment Score** tools help maintain tone, quality, and compliance before launch.
- **Personalization** allows you to tailor content one-to-one based on real-time profile attributes and behavior.
- **Dynamic content** enables message variation across segments using targeting rules and conditional logic.
- Testing with **simulation profiles** and running **compliance checks** ensures messages render correctly and match brand standards before going live.

Checklist

- ☐ Did you create and configure the Connection 5G brand?
- ☐ Did you build and apply header/footer fragments?
- ☐ Did you use the AI Assistant to generate content?
- ☐ Did you run brand alignment checks and resolve issues?
- ☐ Did you test your journey with a test profile and review the email?

IF YOU ARE READING THIS IT MEANS YOU ARE AT THE END OF THE LAB.

DO NOT PROCEED, DO NOT PASS GO, DO NOT COLLECT \$200