

07/07/25 | WU AJO Orientation

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1. Hands-on Lab Resources



CRM Platform Checklist - Adobe Answered

 [Updated CRM Platform Checklist - Adobe ...](#)



Lab Presentation & Resources

Your post-lab page for content and helpful links to product documentation.

Manage Templates and Fragments using APIs:

 [createTemplatesAndFragmentsAPIs.json](#)



In App Templates (HTML):

 [inappSampleAbsoluteImgRef.html](#)



 [inappSampleToBeReplacedByAssets.html](#)



Adobe Experience Platform Documentation:

[Experience League Documentation](#)

Lab Presentation:

 [WU_Orientation_Lab.pdf](#)



2. Data Foundations

2.1. Data Ingestion : in-Platform Walkthrough

In Adobe Experience Platform, data ingestion is the transportation of data from assorted sources to a storage medium where it can be accessed, used, and analyzed by an organization. Data ingestion in Experience Platform can be grouped into two main categories: **streaming ingestion** and **batch ingestion**.

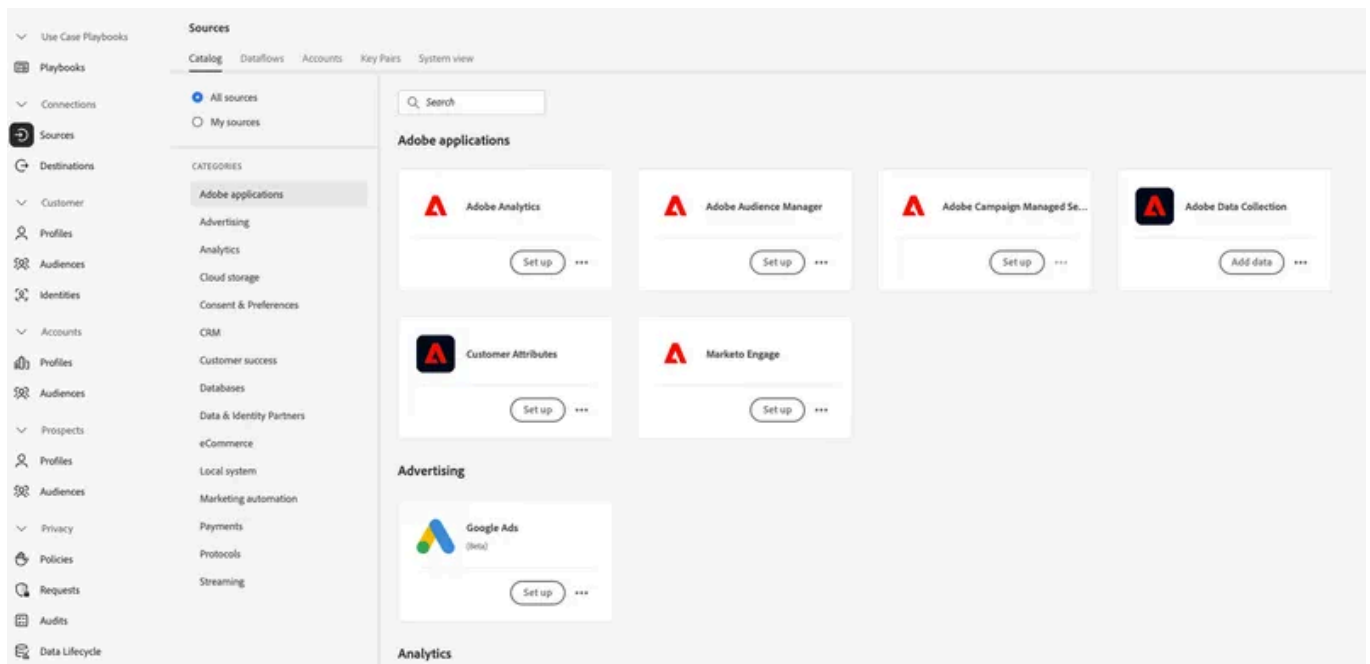
Under streaming and batch ingestion are a number of different methods that you can use to ingest your data into Experience Platform. These methods include the use of a variety of **sources** and connecting to these sources to then bring data into Experience Platform.

2.1.1. Source Connections : in-Platform Walkthrough

Adobe Experience Platform allows data to be ingested from external sources while providing you with the ability to structure, label, and enhance incoming data using Experience Platform services. You can ingest data from a variety of sources such as Adobe applications, cloud-based storages, databases, and many others.

Review existing Source Catalog

1. Navigate to **Sources** under Connections in Adobe Experience Platform UI
2. Review different categories of source connectors within the **Catalog** tab



2.1.2. Schemas : in-Platform Walkthrough

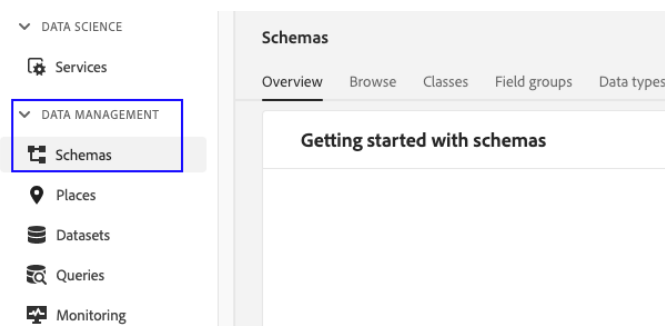
Note: This portion will be a demo. Follow the instructor as they proceed to review an existing Schema

A schema is a set of rules that represent and validate the structure and format of data. At a high level, schemas provide an abstract definition of a real-world object (such as a person) and outline what data should be included in each instance of that object (such as first name, last name, birthday, and so on).

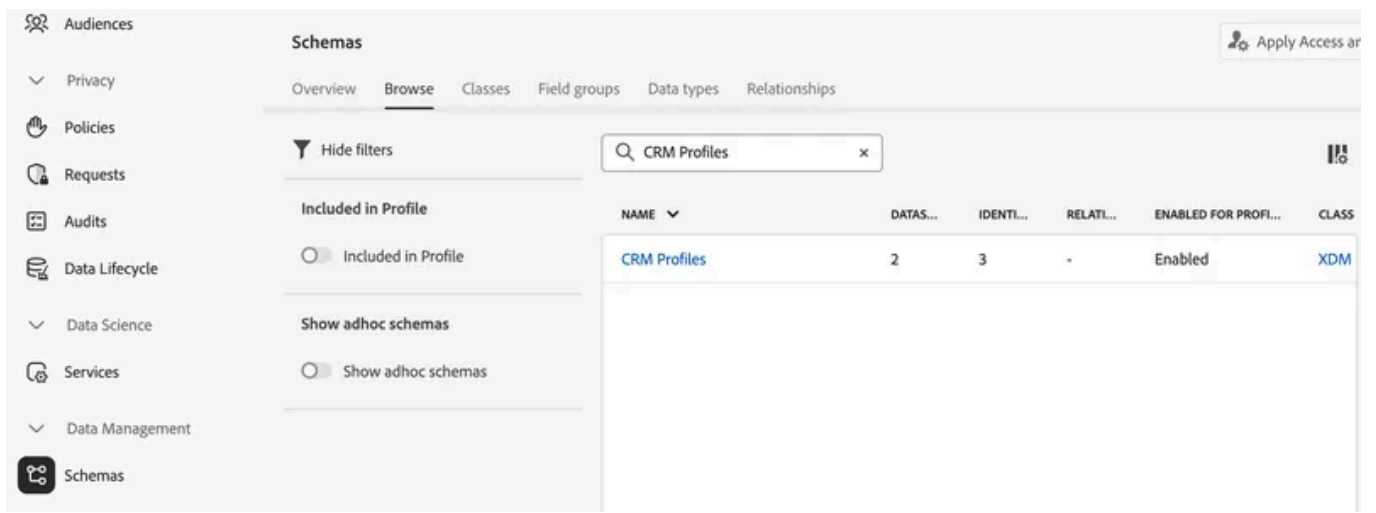
In addition to describing the structure of data, schemas apply constraints and expectations to data so it can be validated as it moves between systems. These standard definitions allow data to be interpreted consistently, regardless of origin, and remove the need for translation across applications.

Review an existing Individual Profile Based Schema

1. Navigate to **Schemas** under Data Management in Adobe Experience Platform UI

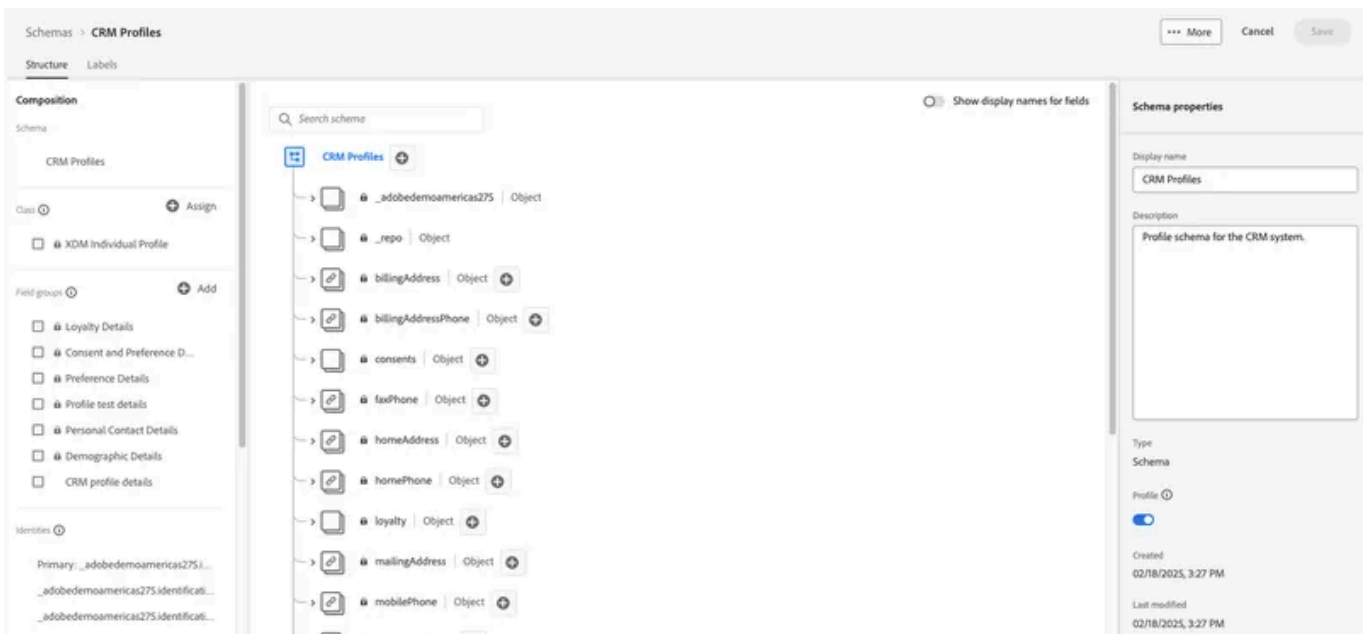


2. Click on the **Browse** tab. Search for **CRM Profile**. Click on the schema name to explore this schema



3. Review the following components within the schema

- Class
- XDM (Experience Data Model) structure of the schema
- Field Groups
- Identities
- Profile button



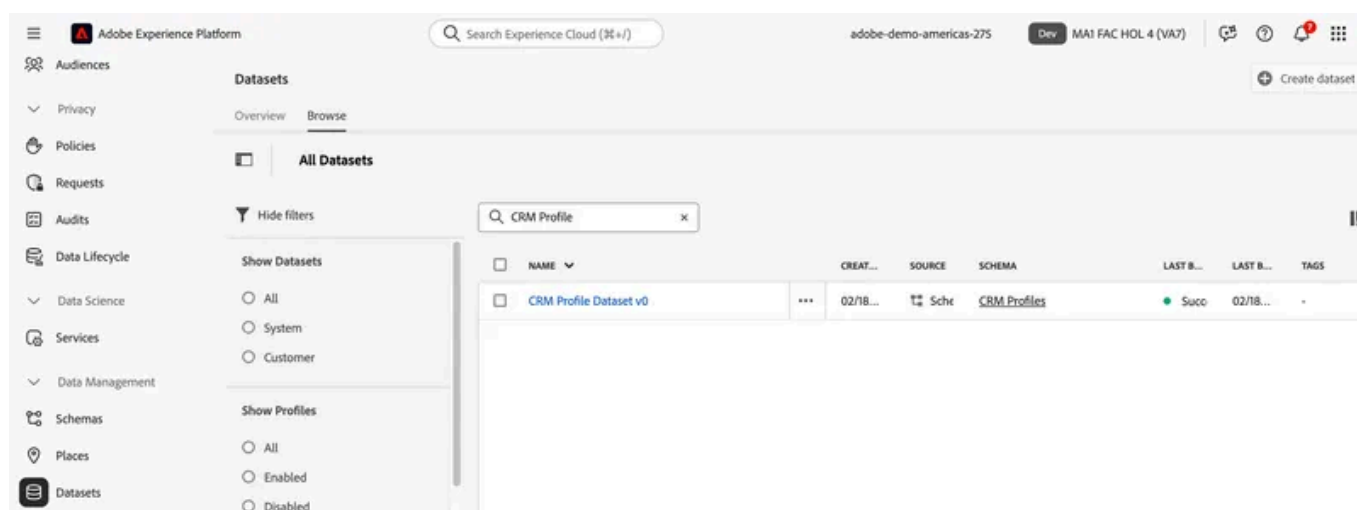
2.1.3. Datasets : in-Platform Walkthrough

Note: This portion will be a demo. Follow the instructor as they proceed to review an existing dataset

A dataset is a storage and management construct for a collection of data, typically a table, that contains a schema (columns) and fields (rows). Datasets also contain metadata that describes various aspects of the data they store.

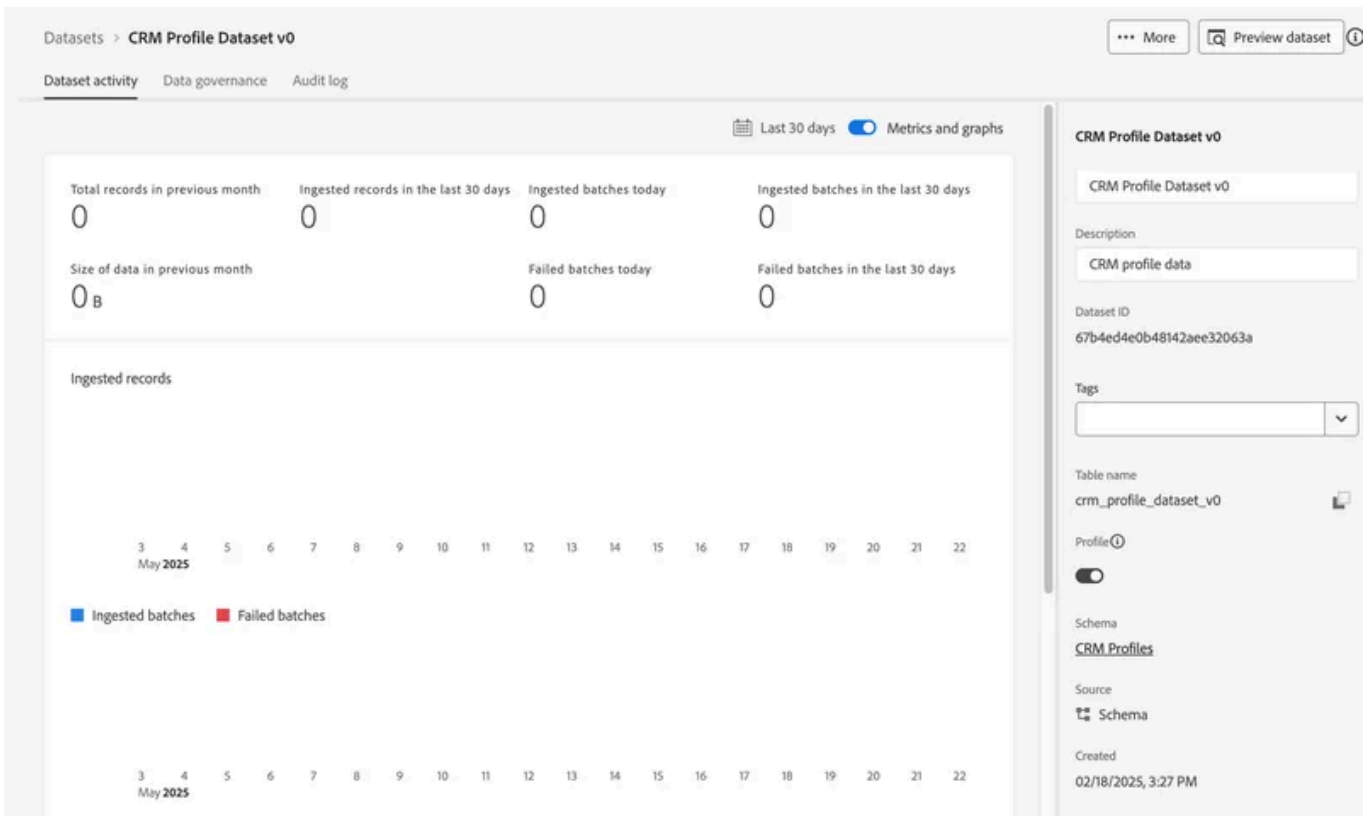
Review an existing Dataset

1. Navigate to **Datasets** under Data Management in Adobe Experience Platform UI
2. Click on the **Browse** tab. Search for and Click on the dataset called **CRM Profile Dataset v0**



3. Review the following on the Datasets page

- Schema for the dataset
- Profile button
- Preview Dataset



Datasets > CRM Profile Dataset v0

CRM Profile Dataset v0

Search field

CRM Profiles

- _adobedemoamericas275 | Object
- billingAddress | Object
- consents | Object
- loyalty | Object
- mobilePhone | Object
- person | Object
- personalEmail | Object
- _id | String
- personID | String
- preferredLanguage | String

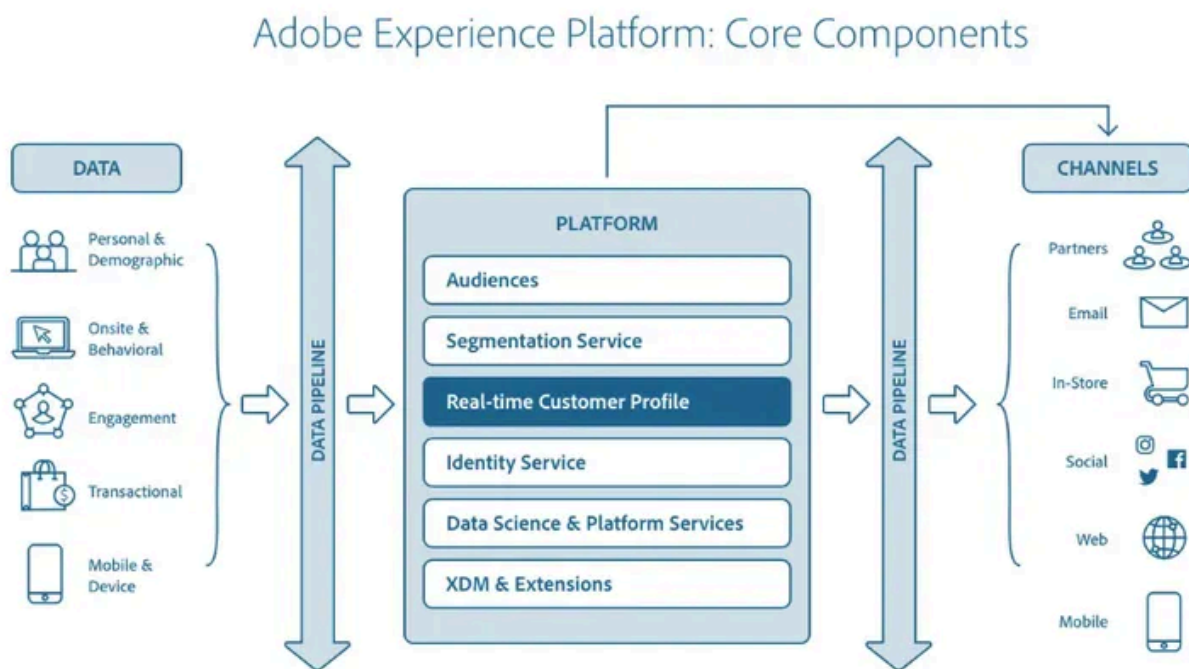
LOYALTY.TIER	PREFERREDLANGUAGE	LOYALTY.STATUS	_ADOBEDEMO
bronze	eng	inactive	small
silver	eng	inactive	large
platinum	eng	active	small
platinum	eng	inactive	large
gold	eng	active	small
silver	eng	active	medium
bronze	eng	inactive	medium
silver	eng	inactive	small
silver	eng	inactive	medium
bronze	eng	active	large
silver	eng	active	large

2.2. Real-Time Customer Profile : Hands-on Lab

Adobe Experience Platform enables you to drive coordinated, consistent, and relevant experiences for your customers no matter where or when they interact with your brand. With Real-Time Customer Profile, you can see a holistic view of each individual customer by combining data from multiple channels, including online, offline, CRM, and third party. Profile allows you to consolidate your customer data into a unified view offering an actionable, timestamped account of every customer interaction. This overview will help you understand the role and use of Real-Time Customer Profile in Experience Platform.

Profile in Experience Platform

The relationship between Real-Time Customer Profile and other services within Experience Platform is highlighted in the following diagram:



2.2.1. ECID Profile Lookup : Hands-on Lab

Exploring a Web Visitor profile in Adobe Experience Platform

1. Navigate to **Profiles** from the left-hand navigation bar.
2. Click on the **Browse** tab.
3. Search for '**ECID**' under namespaces.
4. Enter the below string as the Identity Value.

56385312490897606582942595126704000026

Profiles

Overview **Browse** Merge Policies Union Schema Computed attributes

Browse profiles by merge policy and filter by an identity value (optional).

Merge policy ⓘ * Identity namespace ⓘ Identity value ⓘ

Default Timebased X ECID X 131616475745021459832211... View Clear

PROFILE ID	FIRST NAME	LAST NAME	PERSONAL EMAIL
A2_GTLWh3_RDEpMIXA_zz7Ms	-	-	

5. Click View
6. Now click on the Profile Id to explore the following tabs
 - Details
 - Attributes
 - Events
 - Audience Membership
 - Identity Graph

This is what a pseudonomous visitor profile looks like

2.2.2. Email Profile Lookup : Hands-on Lab

Exploring an existing CRM profile in Adobe Experience Platform

1. Navigate to **Profiles** from the left-hand navigation bar.
2. Click on the **Browse** tab.
3. Search for '**Email**' under namespaces.
4. Enter the below string as the Identity Value.

```
samuel.hernandez.4eb40c80abb@sbcglobal.svpoc.io
```

Profiles

Overview **Browse** Merge Policies Union Schema Computed attributes

Browse profiles by merge policy and filter by an identity value (optional).

Merge policy ⓘ * Identity namespace ⓘ Identity value ⓘ

Default Timebased × Email × mia_lee_27684@yahoo.sv... **View** Clear

PROFILE ID	FIRST NAME	LAST NAME
BUFSbWlhX2xlZV-BJGxAeWFob28uc3Zwb2MuaW8	-	-

6. Now click on the Profile Id to explore the following tabs

- Details - All Widgets
- Attributes
- Events
- Audience Membership
- Identity Graph

This is what a known customer profile with some CRM data would potentially look like

2.2.3. Profile Stitching : in-Platform Walkthrough

Profile Stitching - Web to CRM via onsite authentication

Follow the instructor as they log-in to a [demo](#) site using the email address value resulting in a real-time profile stitch of their pseudonymous online profile and with the known CRM profile.

The real-time data ingestion in this example is powered by the AEP Web SDK and the Adobe Edge Network.

Notice how the two profile fragments have merged by observing the following:

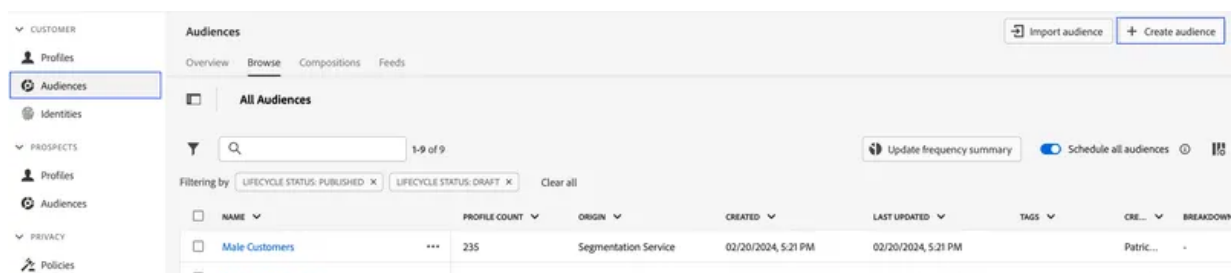
1. The updated identity graph
2. The updated Attributes and Events tabs

2.3. Audiences - Money Transfer Abandoners: Hands-on Lab

As part of this section, we will create an audience of customers who:

- Abandoned the shopping the cart while logged in to the site (Event Based)
- Belong to the Platinum loyalty tier (Attribute Based)

1. Click on **Audiences** in the left navigation panel.
2. In the top right corner of the screen, click **Create Audience**.



3. Select **Build Rule**.

4. Click **Create**.

Create audience

Select creation method.



Compose audience

Create and manipulate 1+ audiences within a multi-step workflow



Build rule

Use attributes and events to create an audience

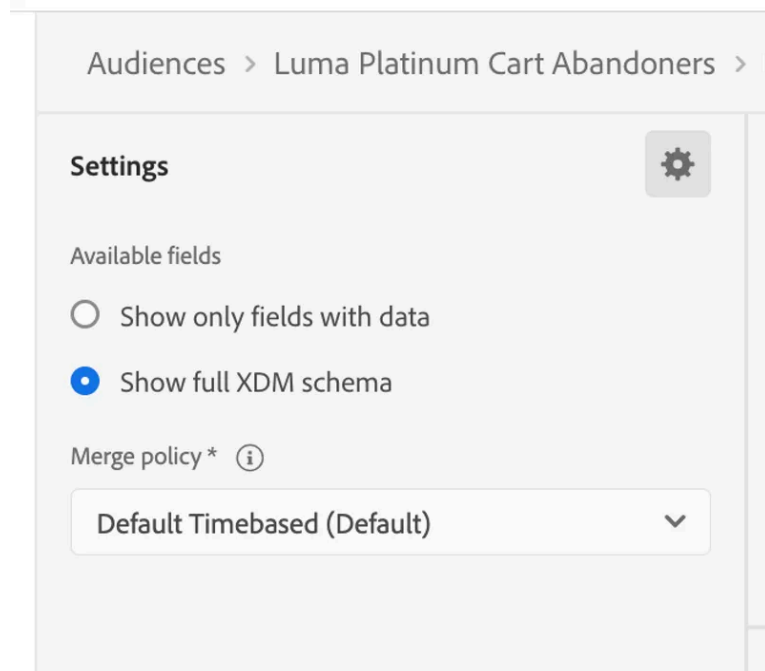
Cancel

Create

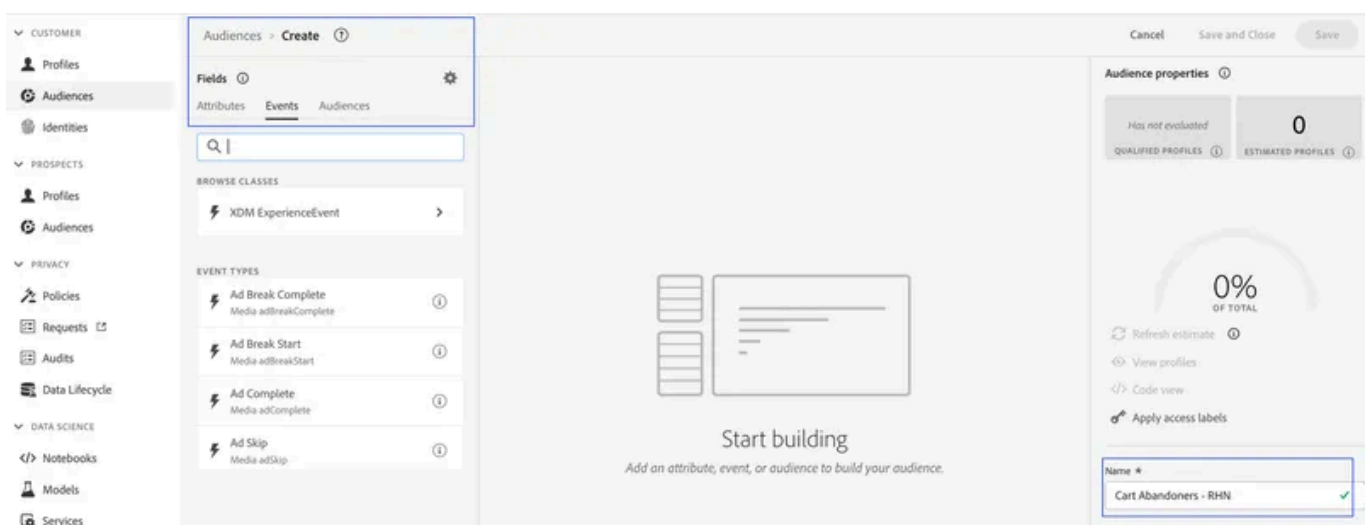
5. Explore the segmentation canvas. This canvas allows marketers to build audiences from ALL existing attributes and events available on the real-time customer profile.

6. Name your audience - **Money Transfer Abandoners - (your initials)**

Before we begin, click the gear icon above the Fields Navigator and select "Show full XDM schema". In doing so, the audience builder will show all available data fields regardless of data availability.



7. Click on **Events** in the Fields navigator. This selection will expose all event based data points that have been onboarded.



8. Search for the term "**Any**", then locate the "Any" Event node. Then, Drag it to the center canvas

9. Click on the **Any Event** node you just dropped one more time. Now, you will see the Event Rules sections display. Now, clear your search from the search bar, and type: "Event Type"

9. Drag the Event Type node inside the Add event field section in the canvas event rules.

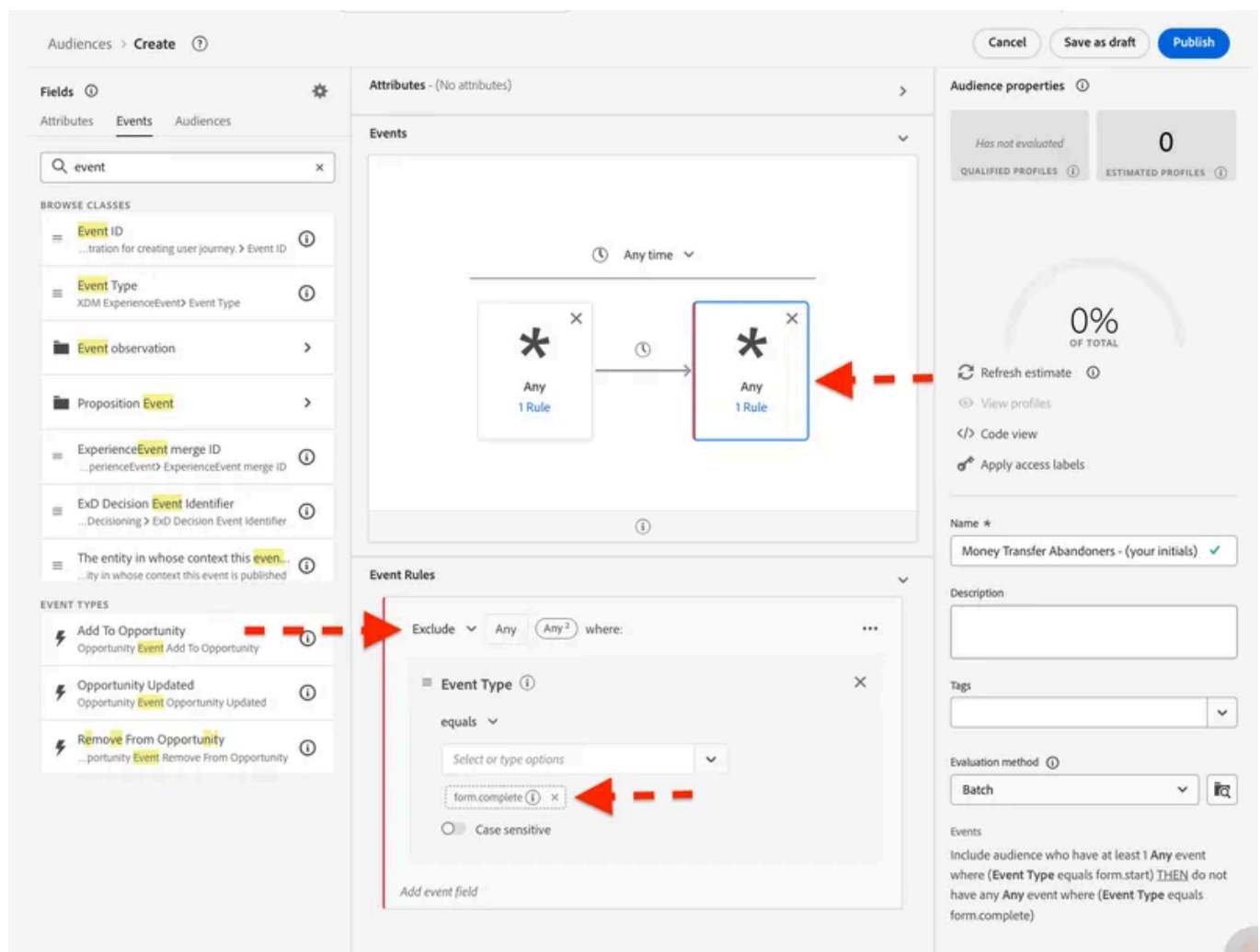
10. Finally, type "**form.start**," then hit enter.

The screenshot shows the Adobe Audience Manager 'Create' interface. The left sidebar has tabs for 'Fields', 'Events', and 'Audiences', with 'Events' selected. A search bar contains 'Event Type'. Below it, 'BROWSE CLASSES' shows 'Event Type' with a sub-item 'XDM ExperienceEvent > Event Type'. The main canvas area is divided into 'Attributes' (No attributes), 'Events' (containing an 'Any' node with '1 Rule'), and 'Event Rules'. The 'Event Rules' section shows a rule configuration: 'Include' dropdown, 'At least 1' frequency, 'Any' condition, and 'where:' clause. The rule is 'Event Type equals form.start'. The right sidebar shows 'Audience properties' with 'Has not evaluated', '0' qualified profiles, and '0%' of total. It also includes a 'Name' field with 'Money Transfer Abandoners - (your initials)' and a 'Description' field.

10. Now, clear your search bar and type "Any" again. This time try to drag it and drop it to the right, next to the "Any" node in the canvas.

11. Repeat steps 9 thru 10, and this time type "**form.complete**"

12. Once you do, then click on the "**include**" dropdown from the **form.complete** rule and select **exclude**.



11. In the Fields navigator, click **Attributes**. Search for **Loyalty**.

12. Click into the Loyalty fields folder. Drag and drop the **Program Name** field.

13. From the drop-down in the attributes container, select the operand exists. In essence, we need users that drop from a money transfer form and must be part of our rewards program.

Audiences > Create ?

Cancel Save and Close Save

Fields ⓘ

Attributes Events Audiences

Search Tier x

BROWSE ATTRIBUTES

Loyalty Tier ⓘ
...15 > Loyalty Program Details > Loyalty Tier ⓘ

Attributes

Include v ...

Loyalty Tier ⓘ x

equals v Select or type options v Platinum x

☐ Case sensitive

Add attribute or audience

Events - Include audience who (have at least 1 Product List Adds event) then (have at least 1 Page Views event where (Name does not contain order-confirmation)) >

Event Rules

Include v At least 1 Page Views ⓘ where: ...

Name ⓘ does not contain v order-confirmation x

☐ Case sensitive

Add event field

0% OF TOTAL

Refresh estimate ⓘ

View profiles

Code view

Apply access labels

Name *

Description

Tags

Evaluation method ⓘ

15. Click **Publish**.

3. AJO

3.1. Offers

Decision management makes personalization easy with a central library of marketing offers and a decision engine that applies rules and constraints to rich, real-time profiles created by Adobe Experience Platform to help you send your customers the right offer at the right time.

Review Offer Components

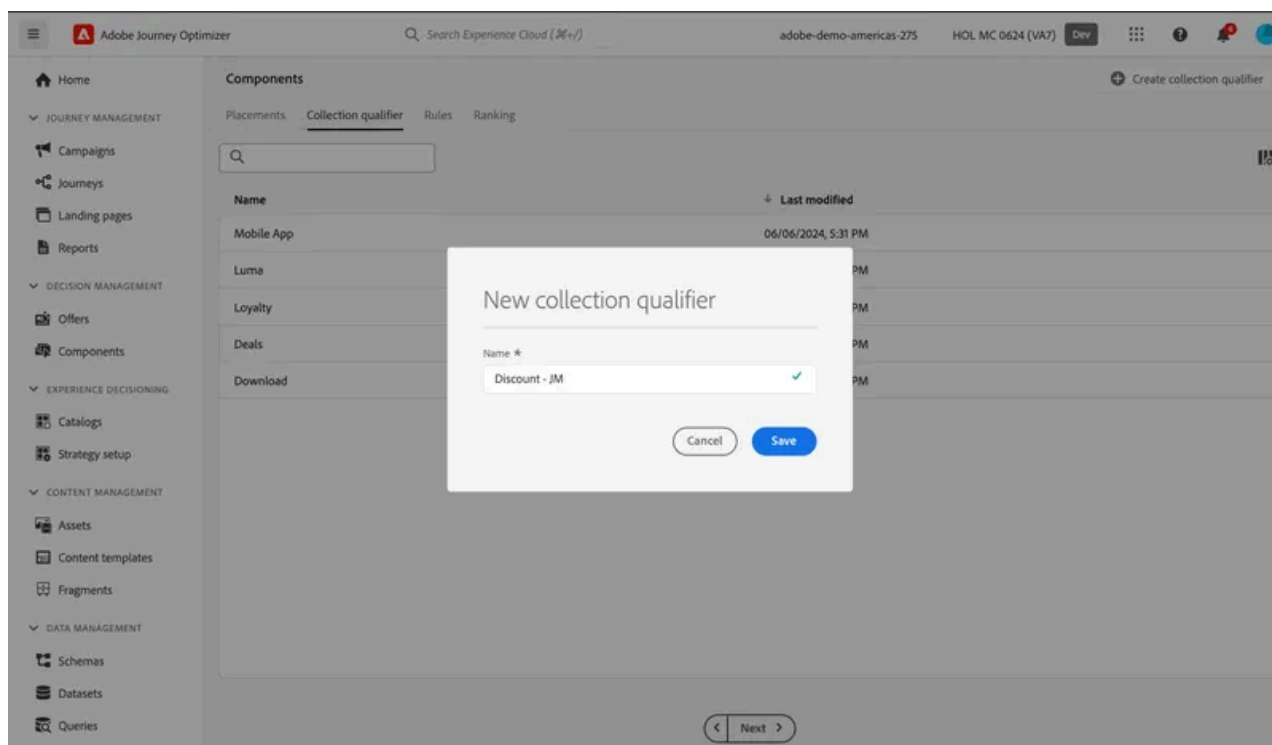
1. Placements
2. Collection Qualifiers
3. Rules
4. Ranking

Note: Try the AI Assistant feature to explore the above.
Try prompts such as "**What are Placements within Offers?**"

3.1.1. Creating a Collection

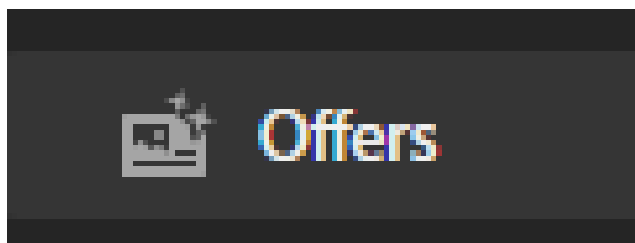
Create a Collection Qualifier

1. Navigate to the Components sub section under the Decision Management section on the left menu.
2. Click on Collection Qualifier.
3. Enter the Name: ***Summer Collection - {your initials}***

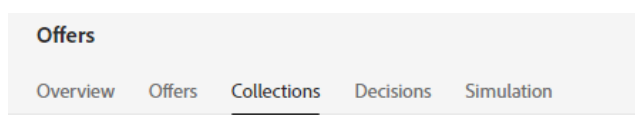


Create a Collection

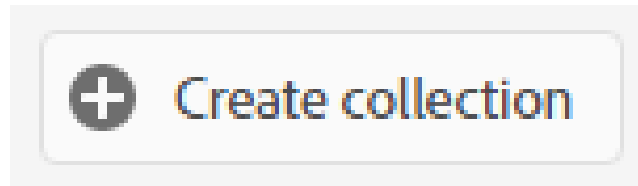
1. Navigate to Offers on the left menu under Decision Management.



2. Select Collections.

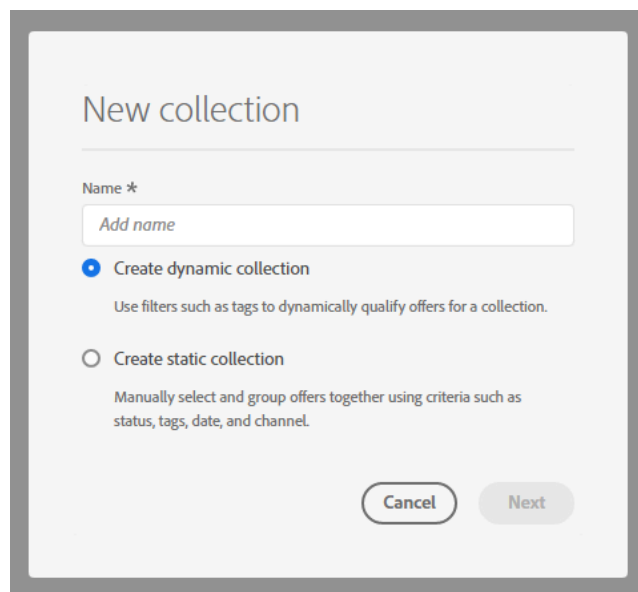


3. Click Create Collection.

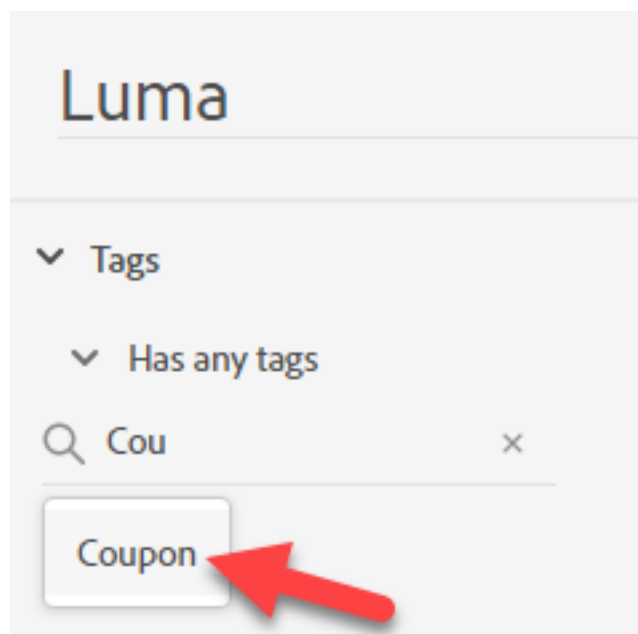


Define the Collection

1. Create a Name for the Collection: Example – "**Summer Campaign Coupon Codes - {your initials}**". Select "Create Dynamic Collection". Click Next.

A dialog box titled "New collection" with a light gray background. It features a "Name *" label above a text input field containing the placeholder "Add name". Below the input field are two radio button options. The first option, "Create dynamic collection", is selected with a blue dot and includes a subtext: "Use filters such as tags to dynamically qualify offers for a collection." The second option, "Create static collection", is unselected and includes a subtext: "Manually select and group offers together using criteria such as status, tags, date, and channel." At the bottom right are two buttons: "Cancel" and "Next".

2. Search for your initials and select the Collection Qualifier you created in the previous step.

A search interface for "Luma". At the top is the word "Luma" in a large, dark gray font. Below it is a section titled "Tags" with a downward arrow. Under "Tags" is another section titled "Has any tags" with a downward arrow. Below that is a search bar with a magnifying glass icon on the left, the text "Cou" in the center, and a close icon (x) on the right. Below the search bar is a list of search results, with the first result being "Coupon". A large red arrow points to the "Coupon" result.

3. Click Save.

Luma

Cancel

Save

Tags

Has any tags

Tags

Coupon X

Dynamic collection preview

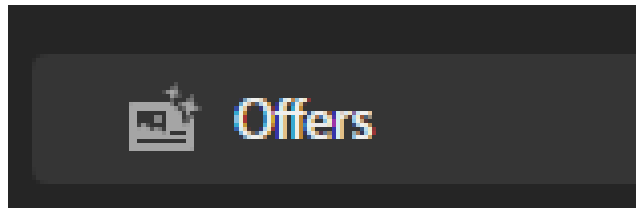
OFFER NAME	STATUS	PRIORITY	START DATE	END DATE	LAST MODIFIED ↓
Luma Coupon Offer	Approved	100	12/31/2021	12/30/2022	1/5/2022, 9:18 AM

3.1.2. Creating an Offer

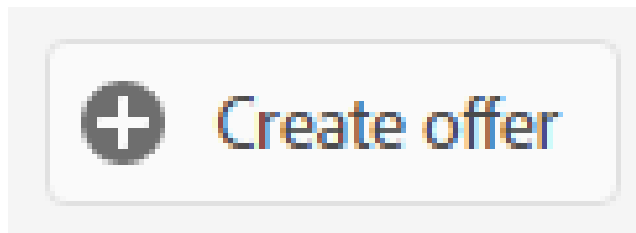
Create a Personalized Offer

Create an Offer

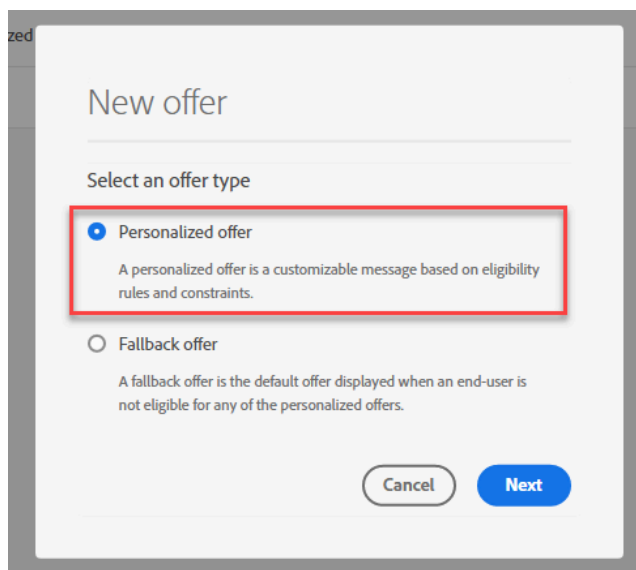
1. Click on Offers under Decision Management on the left menu.



2. Click on Create Offer.



3. Select Personalized Offer.



Define Offer Details

1. For name of Offer, type "**Summer Coupon Code - {your initials}**".

The screenshot shows the 'Create new personalized offer' interface. At the top, there are four tabs: 'Details', 'Add representations', 'Add constraints', and 'Review'. The 'Details' tab is active. Below the tabs, the 'Offer details' section contains several fields: 'Name *' (highlighted with a red box), 'Start date and time *', 'End date and time *', and 'Tags'. The 'Name *' field has a placeholder text 'Offer name'. Below these fields is the 'Offer attributes' section, which includes a table with 'Add label' and 'Add value' columns, and an 'Add attribute' button.

2. Populate the date ranges for Start and End Dates.

The screenshot shows the 'Create new personalized offer' interface with a date picker open for the 'Start date and time' field. The date picker displays 'February 2022' and has a grid of days. The day '4' is selected. Below the grid, there are input fields for 'hh', 'mm', and a dropdown for 'AM/PM'. The 'Offer details' section is visible in the background, showing the 'Name *' field and the 'Offer attributes' section.

3. Add your collection qualifier by search by your initials.

Offers > Create new personalized offer

Manage access Cancel Next

Details Add representations Add constraints Review

Offer details

Name *

Luma Coupon Offer - JMMA ✓

Start date and time *

6 / 18 / 2024, 12:00 AM ✓

End date and time *

11 / 30 / 2024, 12:00 AM ✓

Collection qualifiers

Collection qualifiers

Luma Discount - JMMA x

Offer attributes ⓘ

Add label Add value x

+ Add attribute

Add Constraints

1. Set Offer Eligibility. Leave for All Visitors.
2. Set Capping.
3. Capping Event: Impression.
4. Select "In Total"
5. Capping Event Count: 1,000,000
6. Reset Capping Daily
7. Every 1 day
8. Apply capping accross all placements and click save.
9. Set Priority: 100. Do not Set Capping. Click Next.

Offers > Edit offer

Manage access Cancel Back Next

Details Add constraints Add representations Review

Constraints

Offer eligibility

- ☒ All visitors
- ☐ Visitors who fall into one or multiple audiences
Add one or more audiences of visitors
- ☐ By defined decision rule
Add one decision rule to the offer

Priority

Priority

0

Capping

▼ Capping 1

Event	Capping event count	Type	Reset capping frequency	Scope or capping scope
Impression	1,000,000	Apply capping to all users	Every day	Apply capping across all placements

+ Create capping

Add Representations

1. Select Email as your channel.

Offers > Create new personalized offer

Details Add representations Add constraints Review

Representation 1

Channel *

Select on option

Placement *

Enter or select a placement

+ Add representation

- Email
- Mobile
- Web
- Social
- Non-digital
- Instant messaging

2. Select the "Email Coupon Ticket" as your placement.

Offers > Create new personalized offer

Details Add representations Add constraints Review

Representation 1

Channel *

Email

Placement *

Enter or select a placement

+ Add representation

- { } Email - JSON
- 🖼️ Email - Image
- T Email - Text
- </> Email - HTML
- 🖼️ Email Image - AA

- 3.
4. Select Custom. Then Add.
5. Copy and paste the following code and then click next:

html



```
<table class="structure__table" align="center" cellpadding="0" cellspacing="0
```

Review your Offer Details. Click Finish and Save and Approve.

Your offer should look like this:

Summer Coupon Offer

- Approved

Type	Personalized
Offer ID	dps:personalized-offer:1afe77e0f826faaa
Starts	07/15/2025 12:00 AM
Ends	09/30/2025 12:00 AM
Access management labels	-

Collection qualifiers

Summer Campaign

Offer attributes

1

Representations

Channel	 Email
Placement	</> Email Coupon Ticket
Content	<pre><table class="structure__table" align="center" cellpadding="0" cellspacing="0" border="0" width="750"> <tbody> <tr role="presentation"> <th class="colspan1"> <div class="acr-fragment acr-component" data-component-id="html" data-source-uuid="1ce7fafc-1fc4-42a7-aaac-2a93549c9b67" contenteditable="true"> <div class="acr-structure" data-structure-id="n-n-column" data-structure-name="richtext.structure_n_n_column" data-source-uuid="1fb1fdb5-49e1-4f39-9f25-30eafade107d" data-fragmentbuilder-label="Selected"> <table class="structure__table" align="center" cellpadding="0" cellspacing="0" border="0" width="660"> <tbody> <tr role="presentation"> <th class="colspan-n is-empty" data-source-uuid="f477e202-ead1-495d-9ceb-bb73ea0a0d57" style="height:auto;width:17%;border-radius:0px;border:none;" data-name="Drag a new component here."></th> <th class="colspan-n" style="height:auto;width:71%;background-color:rgb(255, 255, 255);border:none;border-radius:20px;padding:30px 0px;"> <div class="acr-fragment acr-component" data-component-id="text" style="padding:10px 0px 20px;" data-has-intmso-hack="true" contenteditable="false"> <!--[if mso]><table cellpadding="0" cellspacing="0" border="0" width="100%"><tr><td style="padding: 10px 0px 20px;" ><![endif]>> <div class="text-container" contenteditable="true"> <p style="text-align:center;"><span style="font-size:32px;font-</pre>
Language	English (United States)

Offer eligibility

All visitors

Priority and frequency capping

Priority -

Capping 1

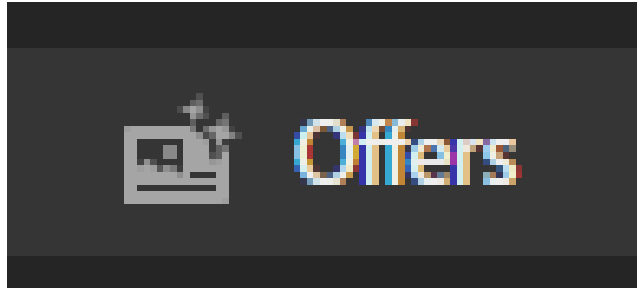
Event	Capping event count	Type	Reset capping frequency	Scope or capping scope
Impression	1,000,000	Apply capping to all users	Every day	Apply capping across all placements

Navigate to the Collections tab and confirm the offer has been brought in due to the collection qualifier being added.

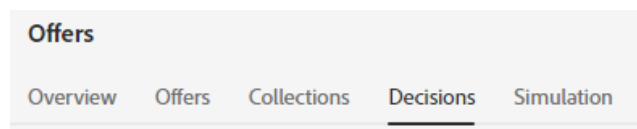
3.1.3. Creating a Decision

Create a Decision

1. Navigate to Offers in the Left Menu.



2. Select Decisions.



3. Click Create Decision.



Define Name and Dates

1. Provide a Decision Name – Example: ***"Summer Discount Decision - {your initials}"***.

Decisions > Create new offer decision

Details Add decision scopes Add fallback offer Summary

Offer decision details

Name *
Decision name

Start and end date

Start date and time
MM/DD/YYYY h:mm A

End date and time
MM/DD/YYYY h:mm A

2. Provide Start and End Dates. Click "Next"

Decisions > Create new offer decision

Details Add decision scopes Add fallback offer Summary

Offer decision details

Name *
Decision name

Start and end date

Start date and time
MM/DD/YYYY h:mm A

End date and time
MM/DD/YYYY h:mm A

February 2022

SU	MO	TU	WE	TH	FR	SA
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

hh : mm AM/PM

Add Decision Scope

1. Select placement of "Email Coupon Ticket"

Decisions > Create new offer decision

Details Add decision scopes Add fallback offer Summary

Decision scopes (1)

Decision scope 1

Placement *

Select a placement where offers would be delivered.

Enter or select a placement

- Email - JSON
- Email - Image
- Email - Text
- Email - HTML
- Email Image - AA

2. Click "Add" to add Evaluation criteria

Decisions > Create new offer decision

Details Add decision scopes Add fallback offer Summary

Decision scopes (1)

DECISION SCOPE 1

Email - Image

0 offer collections

Decision scope 1

Placement *

Select a placement where offers would be delivered.

Email - Image

Evaluation criteria *

Evaluation criteria includes offer collection, eligibility, and ranking method for the offers to be shown in the placement. The sequence of evaluation criteria determines which collection would be evaluated first. At least one evaluation criteria is required.

Add

3. Select your collection and Select Add

Add offer collection

Cancel Add

Offer collections (1)

Search

Luma Coupon Collection

Collection preview

Open offer collections

Luma Coupon Collection (1 matched for Email - Image)

Includes tag: Coupon

OFFER NAME	STATUS	PRIORITY	START DATE	END DATE	LAST MODIFIED
Luma Coupon Offer	Approved	100	12/31/2021	12/30/2022	1/5/2022, 9:18 AM

4. Confirm Eligibility is set to "None" and Ranking method "Offer Priority." Click "Next"

Decisions > Create new offer decision

Details Add decision scopes Add fallback offer Summary

Decision scopes (1)

DECISION SCOPE 1

Email - Image

1 offer collection

Decision scope 1

Placement *

Select a placement where offers would be delivered.

Email - Image

Evaluation criteria *

Evaluation criteria includes offer collection, eligibility, and ranking method for the offers to be shown in the placement. The sequence of evaluation criteria determines which collection would be evaluated first. At least one evaluation criteria is required.

1

Offer collection: Luma Coupon Collection (1)

Eligibility: None

Ranking method: Offer priority

Add

Add Fallback Offer

1. Click on the Coupon Fallback Offer. Click "Next"

Decisions > Create new offer decision

Details Add decision scopes Add fallback offer Summary

Add a fallback offer for selected 1 placement

Open offer library

1 fallback offer for placements: Email - Image

Search

OFFER NAME	STATUS	LAST MODIFIED
Luma Fallback Offer	Approved	1/5/2022, 9:19 AM

2. Review Offer Decision. Click Finish

Decisions > Create new offer decision

Cancel

Back

Finish

Details

Add decision scopes

Add fallback offer

Summary

Offer decision - Jessica

Draft

Starts

02/11/2022 12:00 AM

Ends

02/18/2022 12:00 AM

Decision scopes

Collapse all

Expand all

Placement

Email - Image

Offer collection

Luma Coupon Collection (1)

Eligibility

None

Ranking method

Offer priority

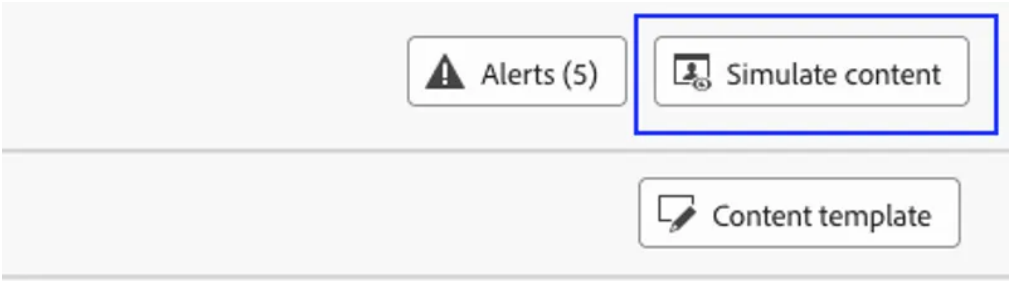
Fallback offer

Fallback

Luma Fallback Offer

3.1.4. Simulating Results

- 1. Click the Simulate content button anytime during the process to simulate for specific profiles.



- 2. Click on Manage profiles. Use the below two profiles for simulations.

Identity namespace: Email

Identity value:

a. `william.lee.b815a935896@gmail.svpoc.io`

- 3. Click on Add decision scope.
- 4. Select the Email Coupon Ticket.
- 5. Select the decision you created in the previous exercise.
- 6. Click Add.

Add decision scope

Placements

Email - Image

Search offer decisions

Name	Start date
☒ Luma Discount Decision - Rahul	7/30/2024
☐ Luma+ Loyalty Program Campaign	7/24/2024

7. Click on View results and review the offer returned.

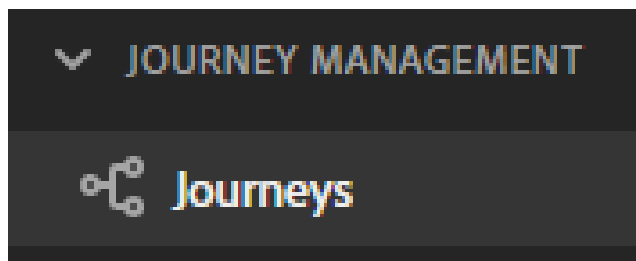
3.2. Journeys in AJO

This lab will walk through the steps to create a Basic Email and SMS Journey in Adobe Journey Optimizer.

NOTE: Some exercises may vary during the actual Hands on Lab versus what is listed in the Archbee Page, due to industry setup and / or Presenter preferences.

Create a Journey

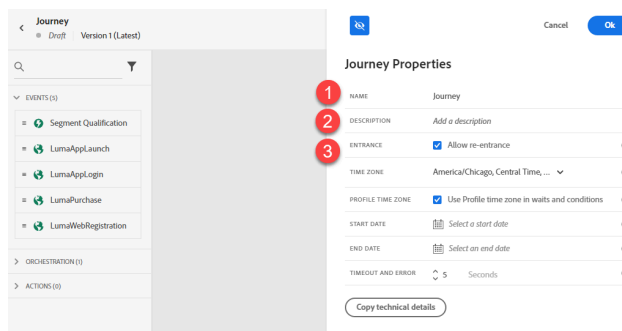
1. Navigate to Journeys within Journey management on the left menu.



2. Click on "Create Journey".



3. Provide a Name and Description: ***Transfer Form Abandoner - {your initials}***



4. Uncheck "Allow Re-Entrance."
5. Click Save.

Define the Audience

1. Under Orchestration Node, drag the "Read Segment" or a "Segment Qualification" node onto the Canvas.
2. Change the label to "Transfer Form Abandoners". Click on Select a Segment.
3. Select "*Transfer Form Abandon - {your initials}*" segment created earlier. Click Save.

Choose a segment

1 selected Cancel Save

Search

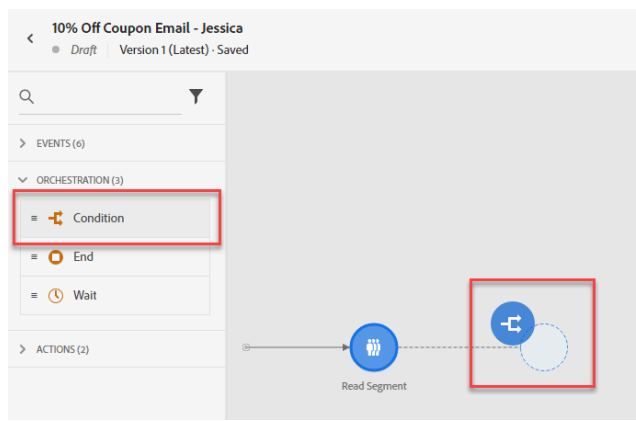
New segment

	NAME	PROFILE COUNT	UPDATE TIME	CREATION TIME
☐	Medium Wealth Customers (SIM - \$2...	45	8/2/2022, 8:05 AM	8/1/2022, 5:08 PM
☒	High Wealth Customers (Over \$2 MIL...	34	8/2/2022, 8:04 AM	8/1/2022, 4:57 PM
☐	Low Wealth Customers (Less than \$1...	31	8/2/2022, 8:01 AM	8/1/2022, 5:06 PM
☐	Diamond Loyalty Members	20	8/1/2022, 5:04 PM	8/1/2022, 5:04 PM
☐	Platinum Loyalty Members	33	8/1/2022, 5:03 PM	8/1/2022, 5:03 PM
☐	Gold Loyalty Members	25	8/1/2022, 5:02 PM	8/1/2022, 5:01 PM
☐	Silver Loyalty Members	32	8/1/2022, 5:01 PM	8/1/2022, 5:01 PM

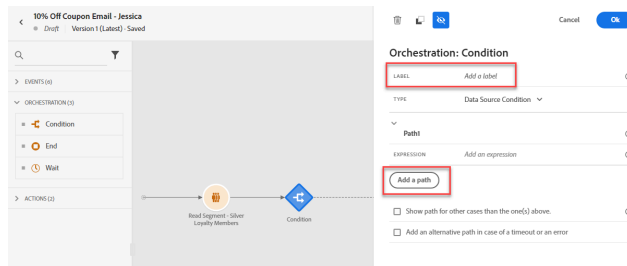


Setup Branching

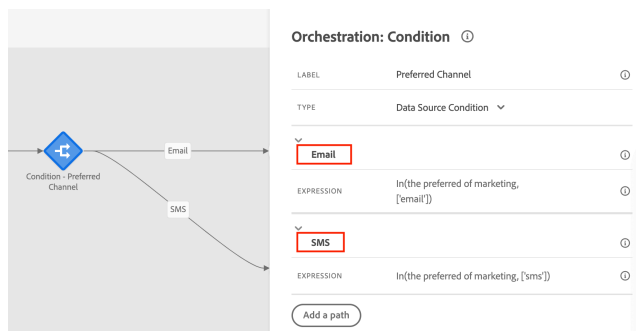
1. Under Orchestration Node, drag the "Condition" after the Read Segment.



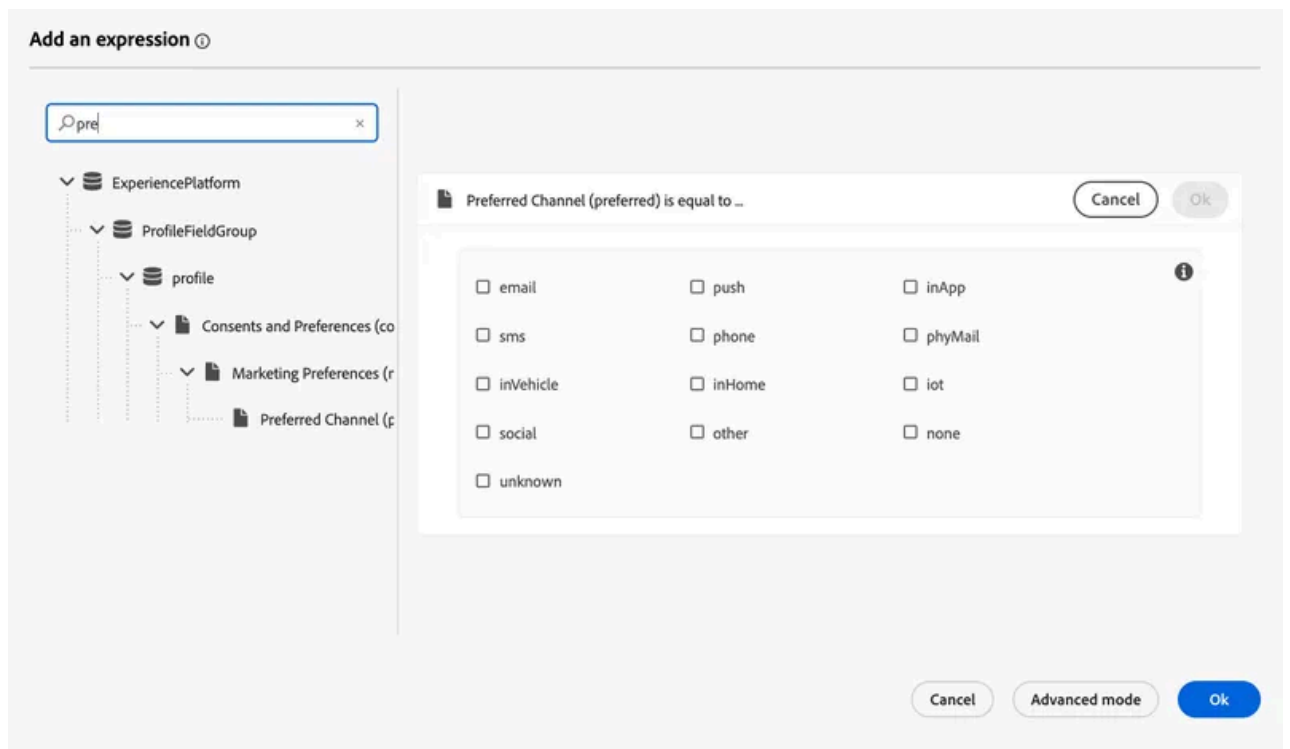
2. Add the label "Preferred Channel". Set Type to "Data Source Condition". Click on "Add a Path" 3 times



3. Click Path1 and rename as "Email". Click Path2 and rename as "SMS". Click Path3 and rename Push



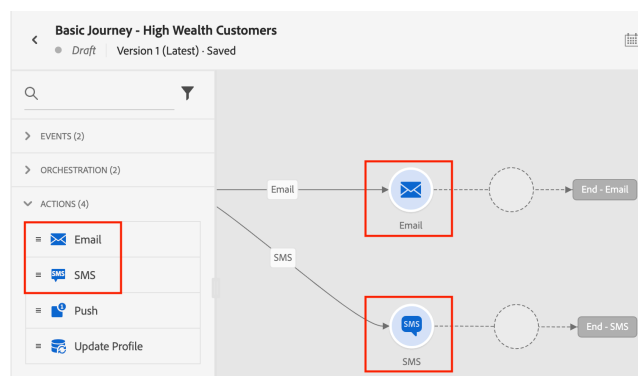
4. Expand the Email path, and click on the Expression Field. Search for preferred channel, and drag and drop it into the canvas.



5. Select the email channel, click ok and then ok.
6. Repeat step 4 and 5 but for SMS, Push and InApp. Use the appropriate value in the Preferred channel field.

Add Messages

1. Under Actions, drag the Email Action onto the Canvas on Email path, drag SMS Action onto the SMS path, drag the Push action onto the Push path and drag the InApp action to the InApp path.



2. Next, we will design the Email, SMS messages, and Push designers.

3.3. Message Designers in AJO

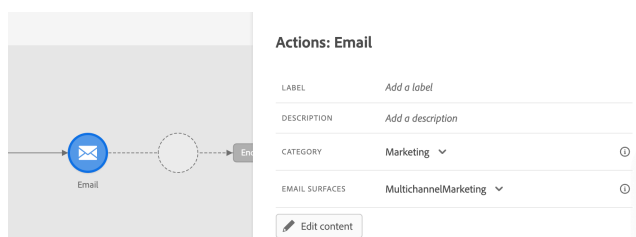
3.3.1. Email Designer

This lab will walk through the steps to create an Email in Adobe Journey Optimizer.

NOTE: Some exercises may vary during the actual Hands on Lab versus what is listed in the Archbee Page, due to industry setup and / or Presenter preferences.

Create a New Message

1. Within the Basic Journey, click on Email action node



2. Enter a Label and Description for the message.
3. Choose **Marketing** for Category and select **Email-Marketing**:

Actions: Email

LABEL	Add a label	
DESCRIPTION	Add a description	
CATEGORY	Marketing ▼	i
EMAIL SURFACES	MultichannelMarketing ▼	i

4. Click on Edit Content

Actions: Email

LABEL	High Wealth Customers - Email	
DESCRIPTION	Add a description	
CATEGORY	Marketing ▼	i
EMAIL SURFACES	MultichannelMarketing ▼	i

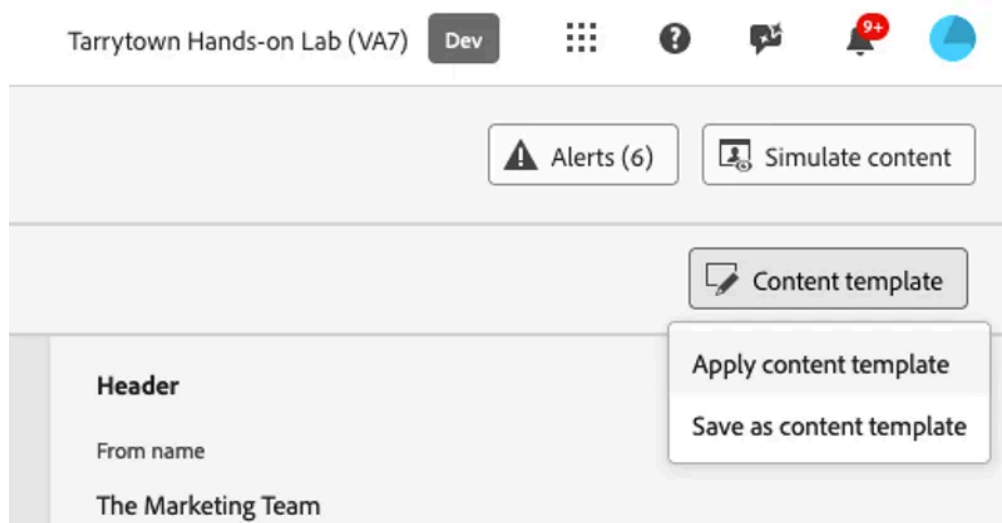
Edit content

Using Content Templates

For an accelerated and improved design process, you can create standalone templates to easily reuse custom content across Journey Optimizer campaigns and journeys.

This functionality enables 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.

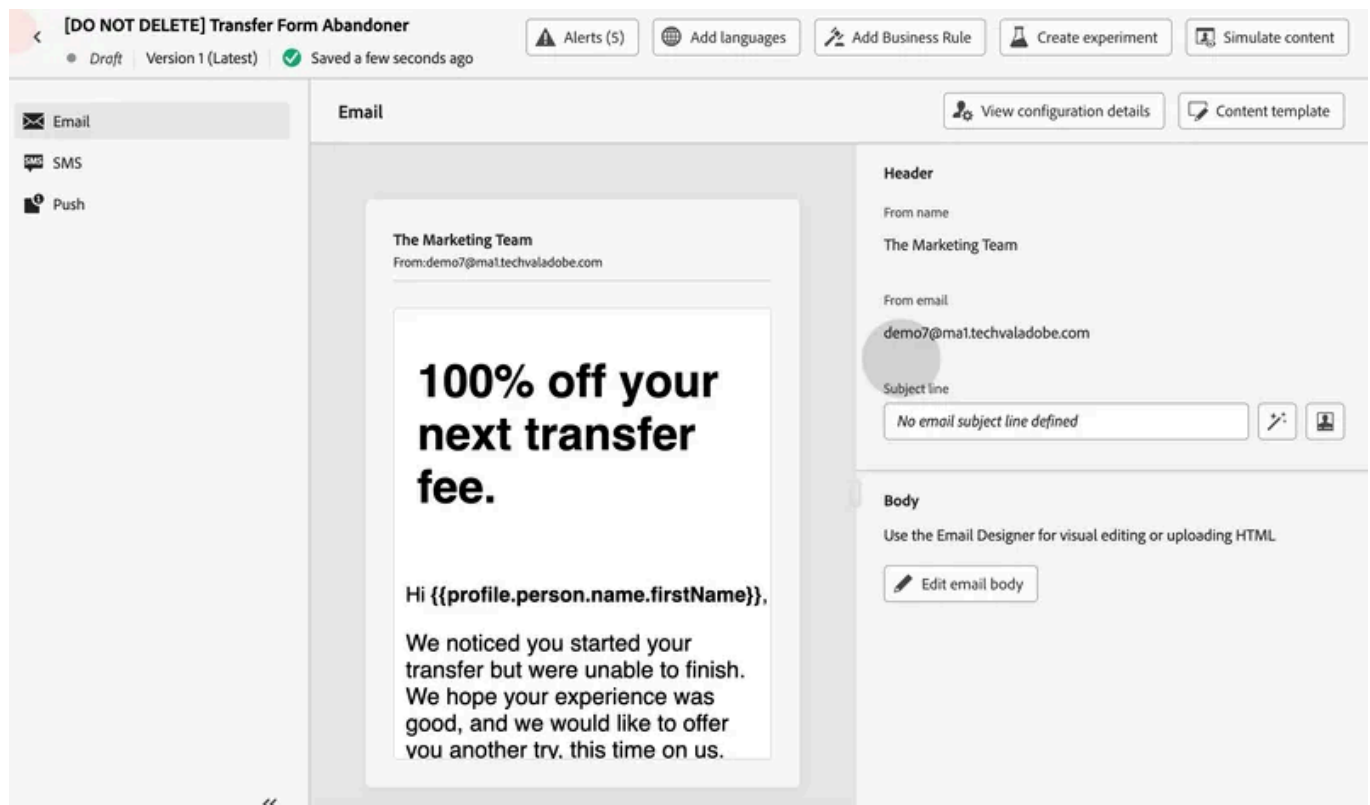
1. Click on Content Template.
2. Select Apply Content Template.



3. Select the pre-saved Email Template called: (UC2 - Abandon Transaction - Email)
4. This will give you a starting point to design your email.

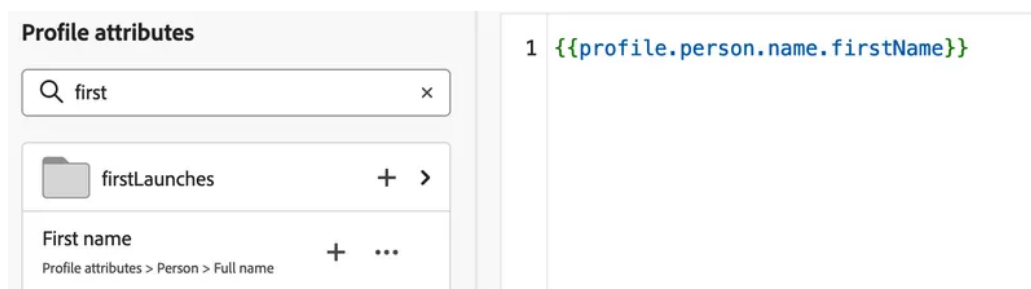
Update Content Design

1. Click on Edit Email Body



Update text content with Personalization

1. Click on the text content block that says "Hi **[[First Name]]**,"
2. Delete **[[First Name]]** from the text, then click on the personalization icon.
3. Search for the term "first" in the Profile attributes box. Add the first name attribute to the canvas

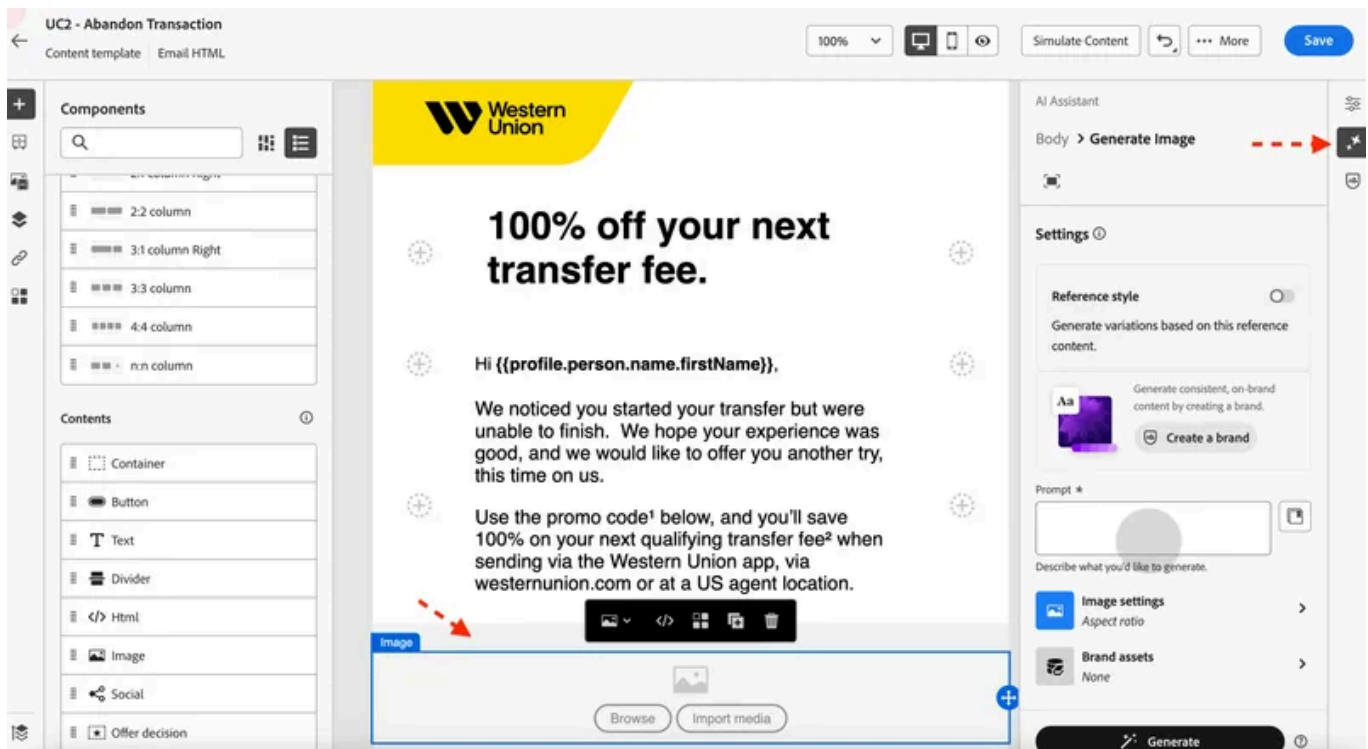


5. Click Save.
6. Format the test string appropriately with a comma and spacing between the first name attribute and the rest of the string.

Use AI to generate Image Content

1. Click on the Image content block right below the Offer block.

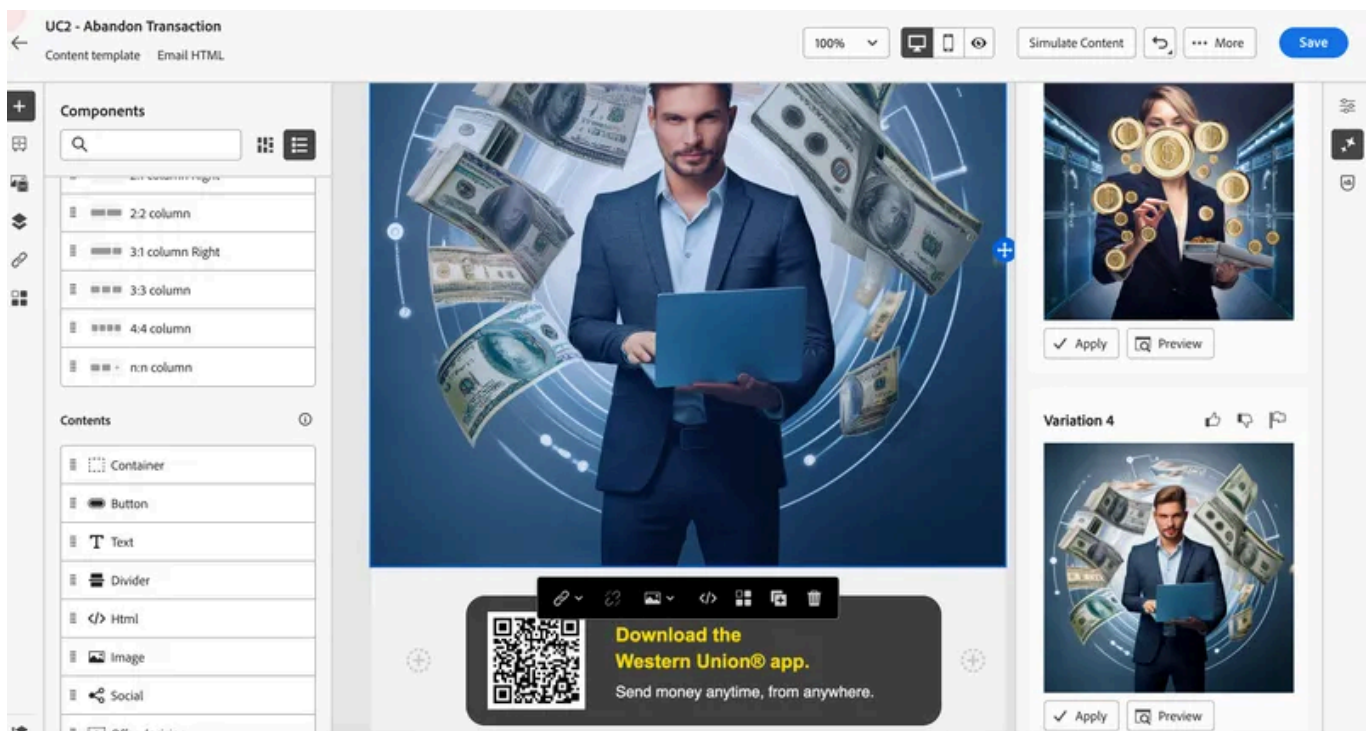
2. Click on Generate and select an image button on the right panel.



3. Type a prompt to generate an image that meets the shopping cart use case story.
Example: "Making a money Transfer"

4. Click on Generate

5. Select the variation that you like best and click on Use this content on the top right.
import the image into the HOL4 directory of the Asset repo.



Clickable Link

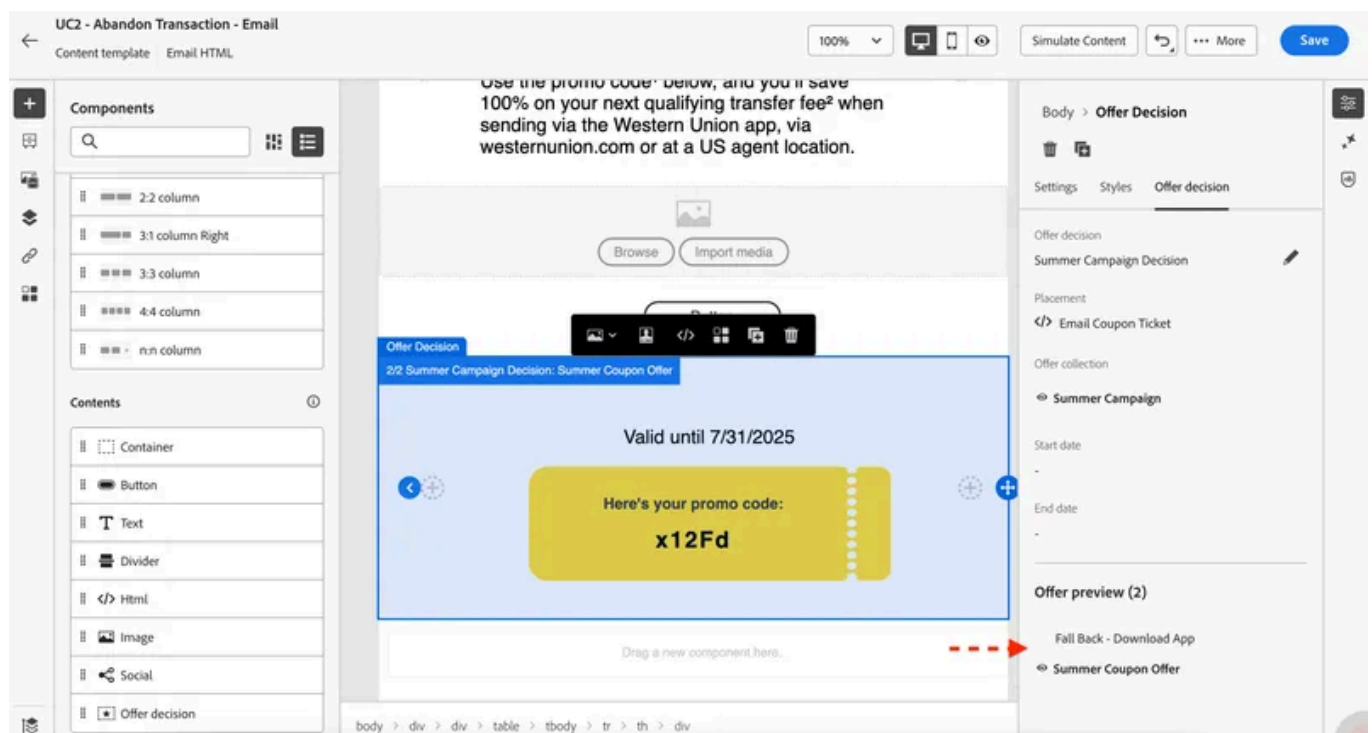
1. Click on the Button content block.
2. Edit the label in the right panel to "Return to Money Transfer".
3. Choose button type: External Link. Add a value of choice.

Note: Similar button could be used to display an Unsubscribe. Type would be set to One-click Opt-out

Offers

An offer is a very targeted piece of content. It contains rules when, where, and who to show the content. You control their priority either manually or dynamically using a ranking formula. This feature allows to also retrieve offers from those systems that can't connect to a web browser. This following steps allow you to consume a final piece of content that has been configured for Marketer to use in their email campaigns.

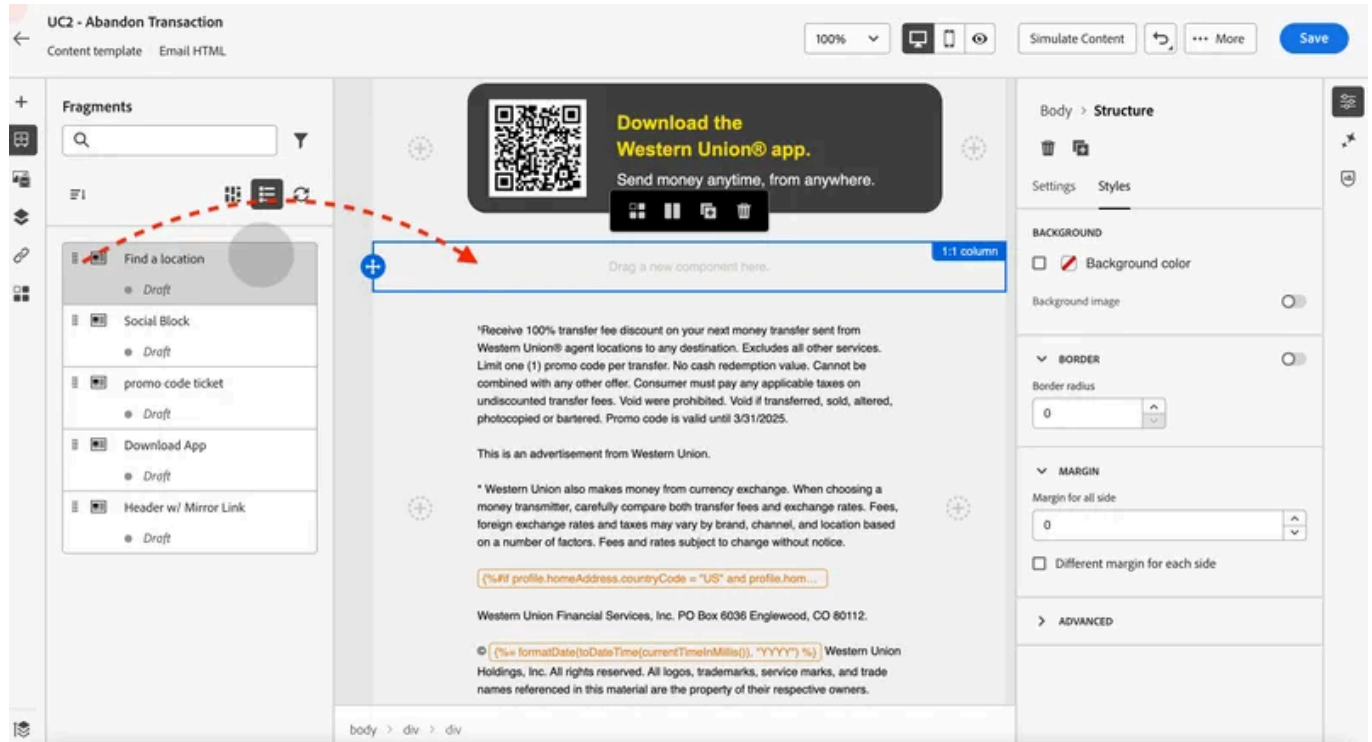
1. Click on the Add button right under the star icon.
2. Select the placement Email Coupon Ticket.
3. Select Summer Campaign Decision.
4. Click Add.
5. Flip between the fallback and the personalized offers.



Fragments

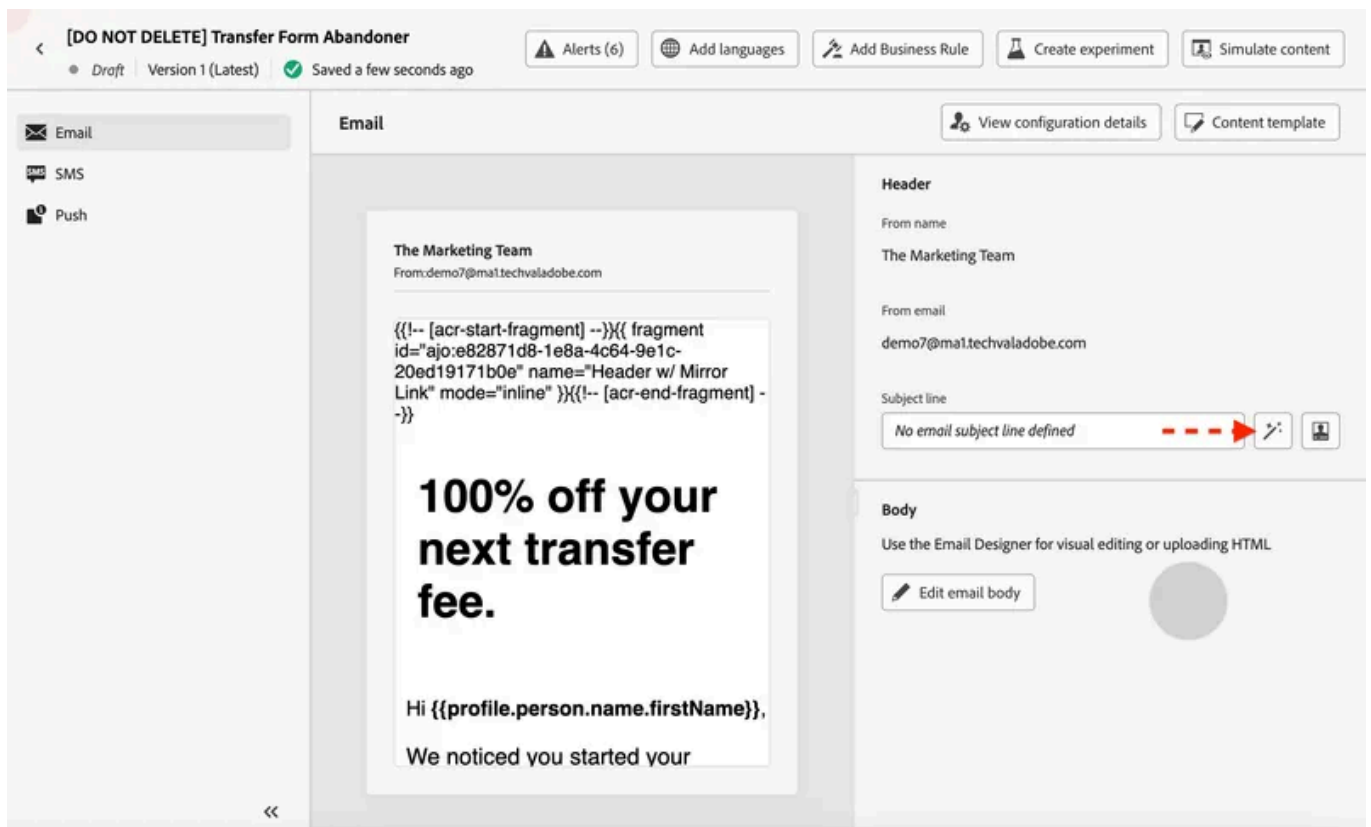
A fragment is a reusable component that can be referenced in one or more emails across Journey Optimizer campaigns, journeys or content template.

1. Click on the Fragments icon on the left panel.
2. Drag the Find Locations into the empty content holder below the western union download app fragment.



Using AI to define a Subject Line

1. Click on the back arrow to land on the Subject Line Screen
2. Click on the AI Assistance icon.

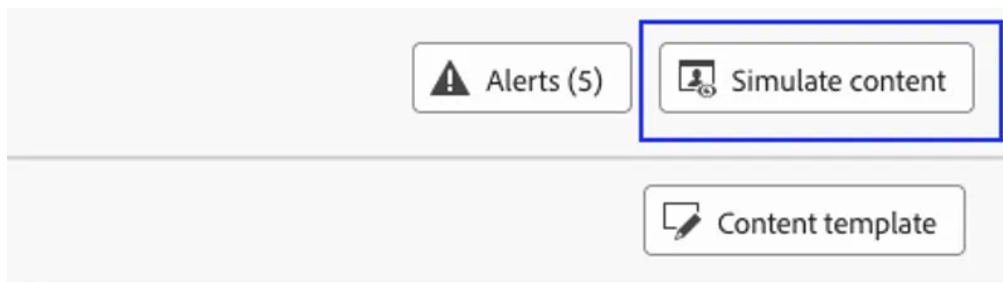


3. Provide a relevant prompt to meet the purpose of the email. Example: *Email subject line for return to website and complete a money transfer*

4. Select a suitable variation and click Save.

Simulating for sample profiles

1. Click the Simulate content button and select Simulate Content option anytime during the process to simulate for specific profiles



2. Click on Manage profiles

3. Use the below profile for simulation

Identity namespace: Email
Identity value:

a. william.lee.b815a935896@gmail.com

Note: if you receive a warning, simply check what it is on the button View Configuration Details. The error means we have no data on specific fields on the channel configuration, but this is fine. This is expected and part of the lab to showcase the level of protection across the workflows.

3.3.2. SMS Designer

This lab will walk through the steps to create an SMS Message in Adobe Journey Optimizer.

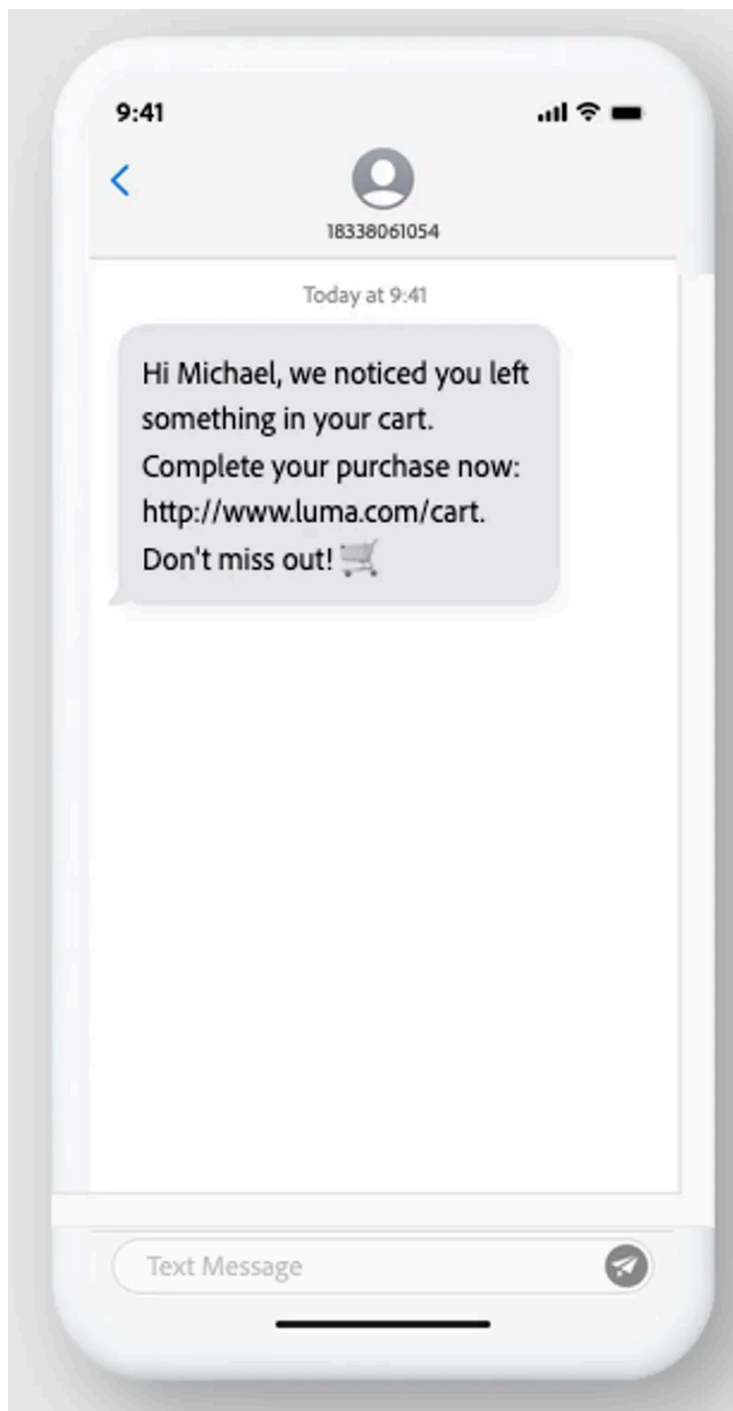
NOTE: Some exercises may vary during the actual Hands on Lab versus what is listed in the Archbee Page, due to industry setup and / or Presenter preferences.

Create a New Message

1. Within your Journey, click on the SMS action node
2. Enter a Label and Description for the message.
3. Select **Marketing** for Category and **MarketingSMS**
4. Click on Edit Content

Define the SMS Message

1. Use the AI assistant to generate the text for the SMS.
2. Add personalization (use First Name to address the customer).
3. Add a URL to click through. Example: <https://dsn.adobe.com/web/jmagana-O4GY/send-money>
4. Simulate using test profiles added in the email designer exercise.
5. Exit the designer after composing the message.

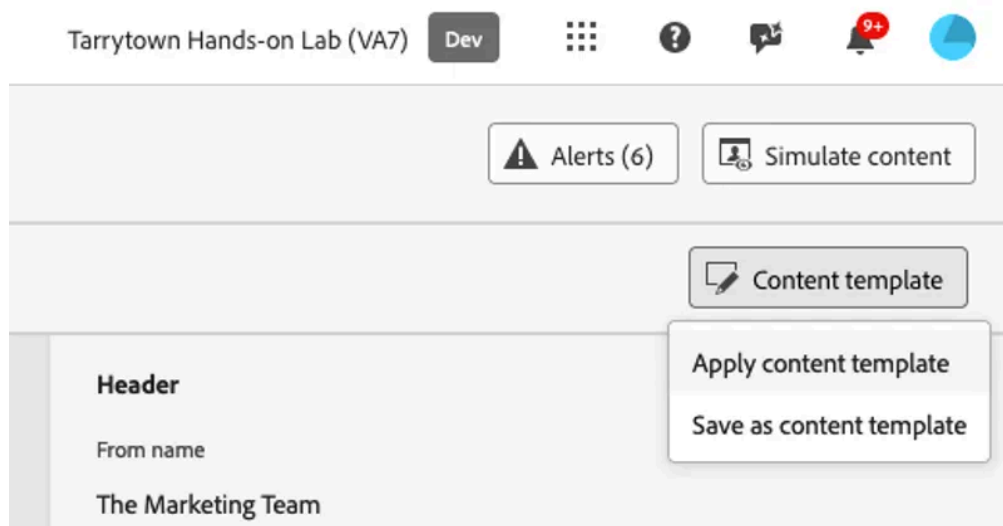


Using Content Templates

For an accelerated and improved design process, you can create standalone templates to easily reuse custom content across Journey Optimizer campaigns and journeys.

This functionality enables 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.

1. Click on Content Template.
2. Select Apply Content Template.



3. Select the pre-saved Email Template called: (UC2 - Abandon Transaction - SMS)
4. This will give you a starting point to design your sms.

3.3.3. Push Message Designer

This lab will walk through the steps to create a Push Message in Adobe Journey Optimizer.

NOTE: Some exercises may vary during the actual Hands on Lab versus what is listed in the Archbee Page, due to industry setup and / or Presenter preferences.

Create a New Message

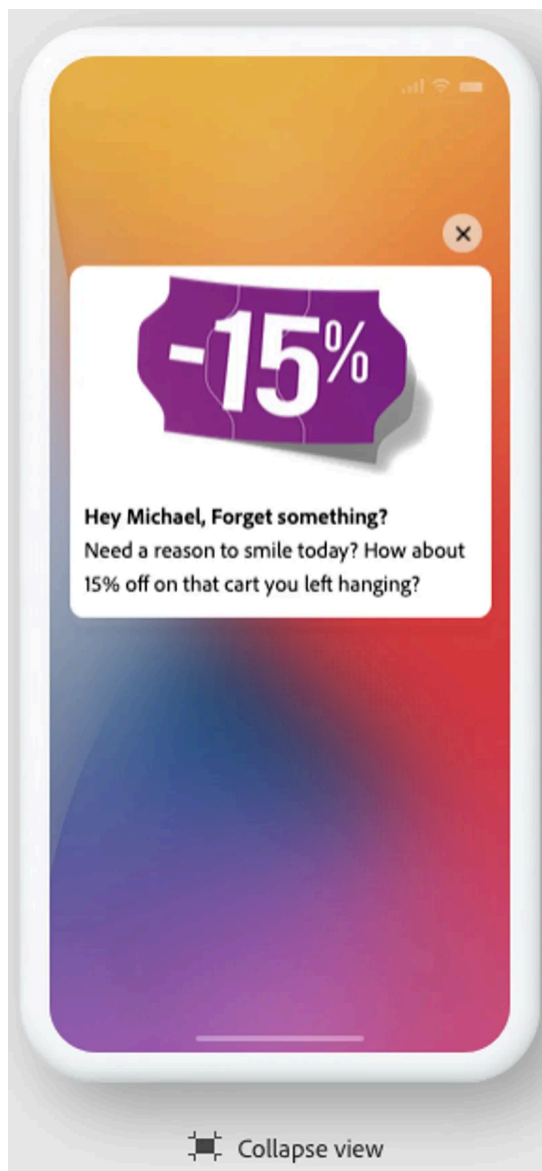
1. Within your Journey, click on the Push action node you added to the canvas.
2. Enter a Label and Description for the message.
3. Select **Marketing** for Category and **PushNotifications** for Push Surfaces
4. Click on Edit Content.

Design Push Message

1. Work within the iOS tab.
2. Use the AI Assistant to generate a suitable Title and Body for the Push message.

Try playing with the "Tone" feature within the AI Assistant module

3. Choose image to be displayed along with the message by clicking on the "Add Media".
5. Simulate using test profiles added in the email designer exercise.
6. Your Push message simulation should look something like this.

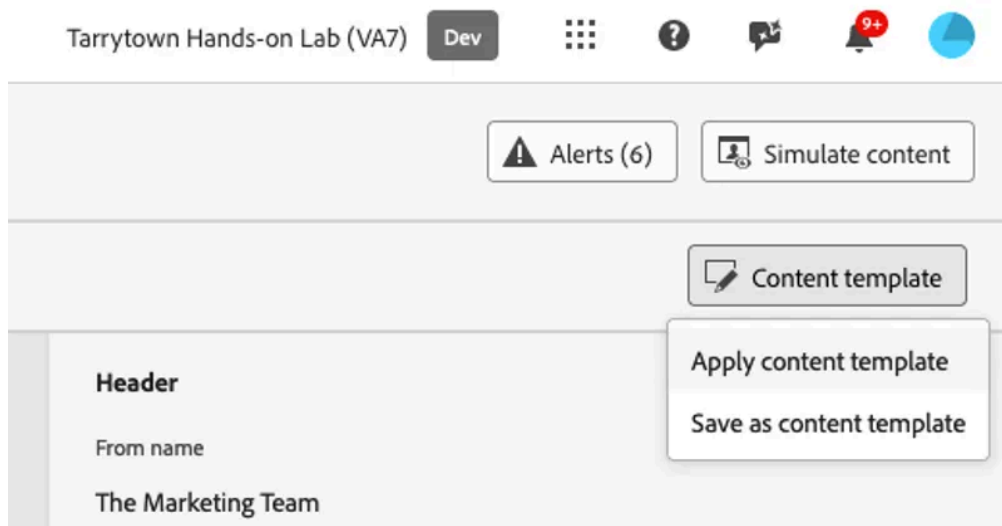


Using Content Templates

For an accelerated and improved design process, you can create standalone templates to easily reuse custom content across Journey Optimizer campaigns and journeys.

This functionality enables 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.

1. Click on Content Template.
2. Select Apply Content Template.



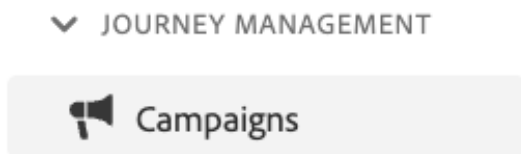
3. Select the pre-saved Email Template called: (UC2 - Abandon Transaction - Push)
4. This will give you a starting point to design your push.

3.4. Campaigns and Experiments

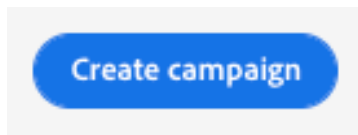
This lab will walk through the steps to create a Campaign in Adobe Journey Optimizer.

NOTE: Some exercises may vary during the actual Hands on Lab versus what is listed in the Archbee Page, due to industry setup and / or Presenter preferences.

1. Navigate to Campaigns



2. Click on "Create Campaign"



3. Under Properties, leave: Scheduled and click create
4. Provide a name: ***Loyalty Customers Campaign - {your initials}***
5. Select **Actions** tab and click the button: "Add Action" and select "In-App"
6. Select In-App Message Configuration: "InAppMessaging"

Add Experiment (A/B Test)

In the same Actions Tab, scroll down...

1. Click the button "Create Experiment".
2. Add A Treatment
3. Click Auto Scale and click Create

Audience
N/A
Please select an Audience for the campaign

Distribution

Treatment A - 50%
Treatment B - 50%

100%
Distribution

☐ Holdout ⓘ

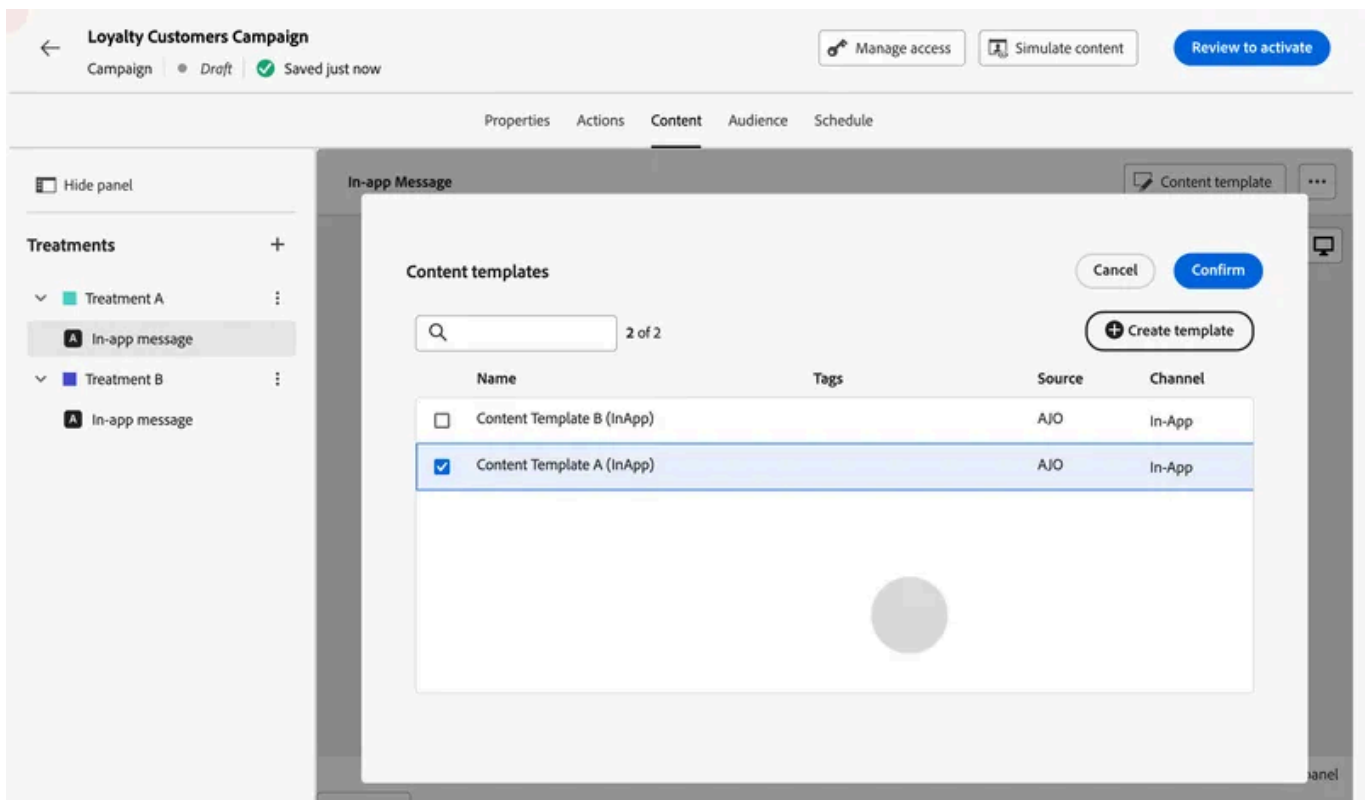
☐ Distribute evenly ⓘ

Treatment A	✓		50.00%	 
Treatment B	✓		50.00%	 

Add Content

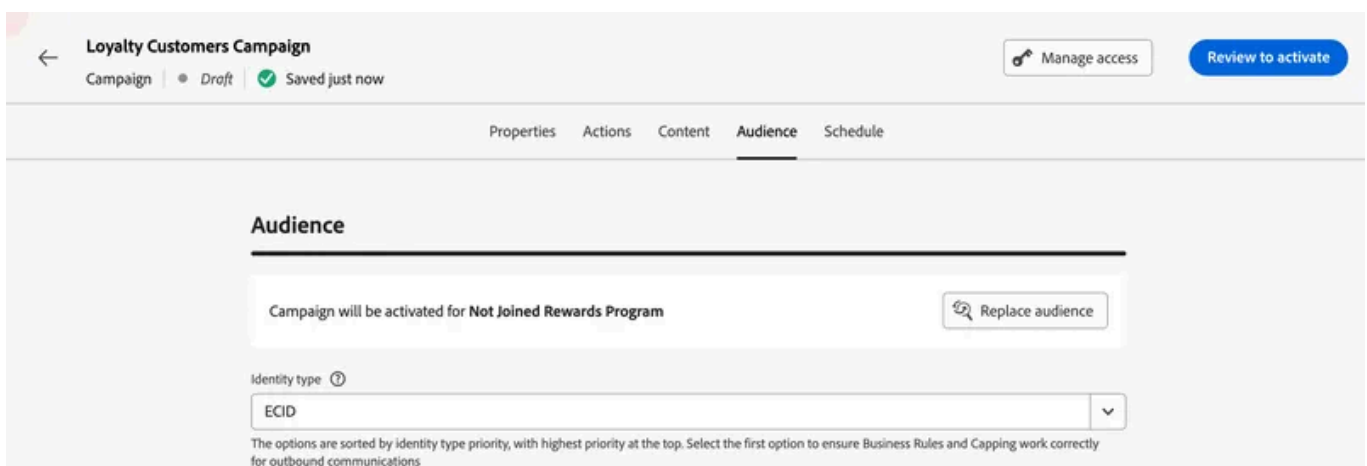
Scroll up the actions tab...

- Click on Edit Content
- Let's create our first in-App version by clicking on Content Template
- Click on Apply Content Template
- Select Content Template A (InApp)
- Click Confirm.



Repeat the above steps but select your Treatment B > In-App Message and select Content Template B (InApp). The idea is to give 2 versions for our experiment. Once done, click on Audience Tab to select our target population.

Select your Audience



Create Schedule

←

Loyalty Customers Campaign

Manage access

Review to activate

Campaign

Draft

✓ Saved just now

Properties

Actions

Content

Audience

Schedule

Schedule

Campaign start

Choose when to start the campaign

When activated manually

On a specific date and time

Campaign end

Choose when to end the campaign

When stopped manually

On a specific date and time

Click Review to activate once you reach this point. This concludes the lab.

3.5. AJO Advanced Concepts

3.5.1. Overview

These set of labs are built to allow advanced users to understand how to build more complex journeys. It will require some technical role to do most of this work.

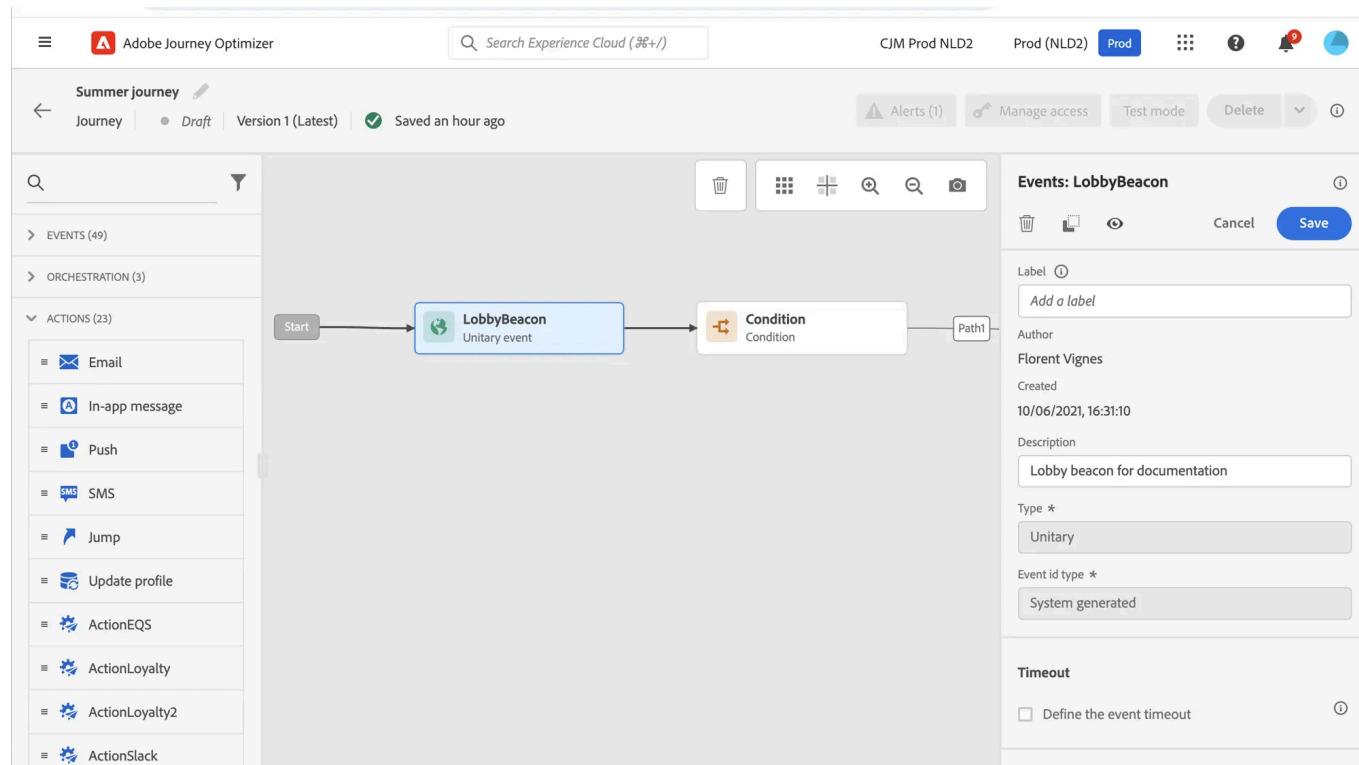
Journeys can be triggered by Experience Events, those events can serve as Webhooks. You can start a journey with an event or you can listen to an event to occur in the middle of your journey.

Journeys can use custom actions to get information or post information from/to external systems. These nodes are very good when calling REST APIs in realtime to enrich even further our journeys.

This set of labs also use an additional technology that is outside of the scope of this lab. We are using this technology to facilitate your validation. It is a set of enterprise tools we built using **Adobe App Builder**. It will allow to trigger campaigns and journeys that have been published for your validation.

3.5.2. Configure Experience Events

Events allow you to trigger your journeys unitarily to send messages, in real-time, to the individual flowing into the journey.



Creating a Journey Experience Event

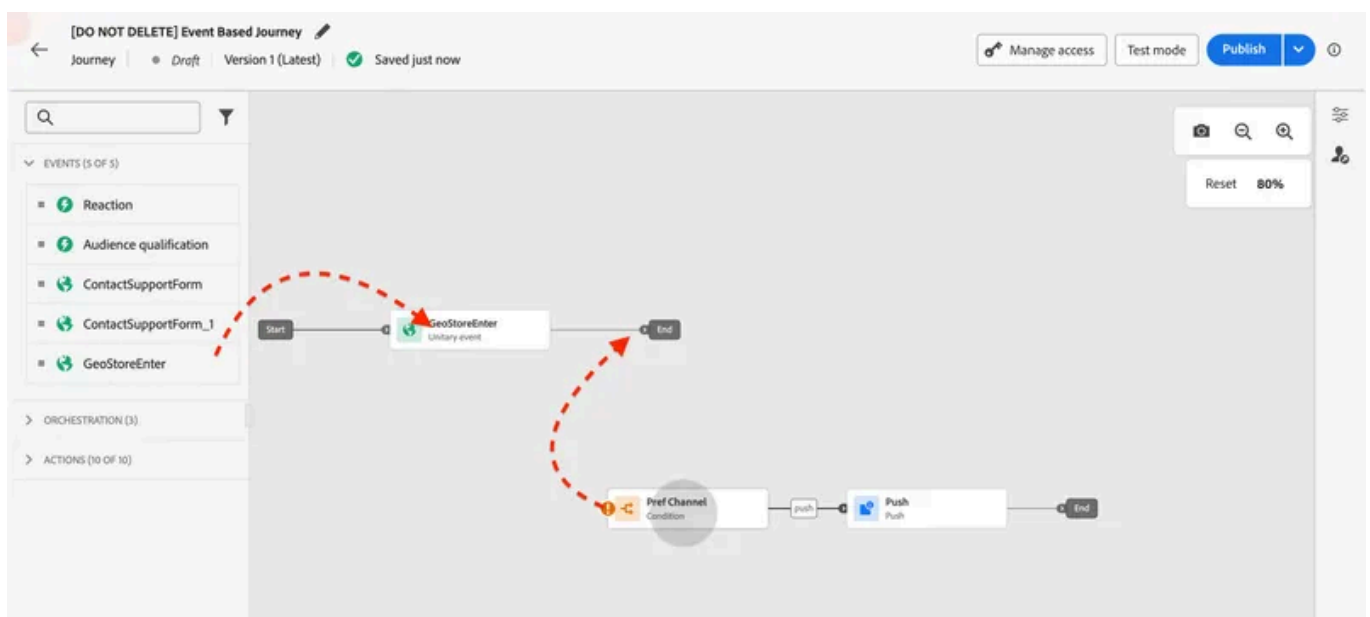
- From the Navigation, click on Configurations under Administrator.
- Click Manage under Events.
- Create Event.
- Name: GeoStoreEnter_INITIALS
- Select: Unitary
- Event id type: Rule Based
- Schema: Mobile App Events v.1
- Click on the 4 fields selected, and search for Event Type. Select and Add.
- Click on the field Event id Condition.
- Drag and Drop Event Type into the canvas. Check the event type called: "location.entry". Click Save.

3.5.3. Configure Event based Journeys

We will be creating a journey that leverages the experience event we just created. This journey has been worked on before, but its not complete since we were missing our Admin to create the event itself, so we won't start from scratch.

Duplicating an existing Journey

1. On your navigation, click on Journeys under Journey Management.
2. Find the journey called [DO NOT DELETE] Event Based Journey and click on the 3 horizontal dots next to its name. Click duplicate.
3. Give a new name with your initials.
4. Find your event on the pallette. Drag and drop it in between the start and end sections.
5. Then connect the condition node by dragging into the "End" of the line (next to the event node). See the next figure.



3.5.4. Configure Custom Actions

Custom actions enable you to configure connection of a third-party system to send messages or API calls. An action can be configured with any service from any provider that can be called through a REST API with a JSON-formatted payload. This is also for technical users, but it will be leveraged by our marketers in operations.

We will be configuring a custom action that allows us to connect to our coupon system to retrieve (in-real-time) unique coupons to display inside of our Communications (Email, Push, SMS, etc). The coupon system is in-charge of the redemption and tracking of the coupon code itself, but AJO allows to communicate and retrieve the unique code.

Create a Custom Action

- From the main navigation, under Administration, click Configurations
- Click on "Manage" under Actions.
- Click on Create Action.
- Provide a Name: GetUniqueCouponCode_Initials.
- Action Type: Custom
- Channel: Other
- Marketing Actions: None

Define Endpoint Configuration

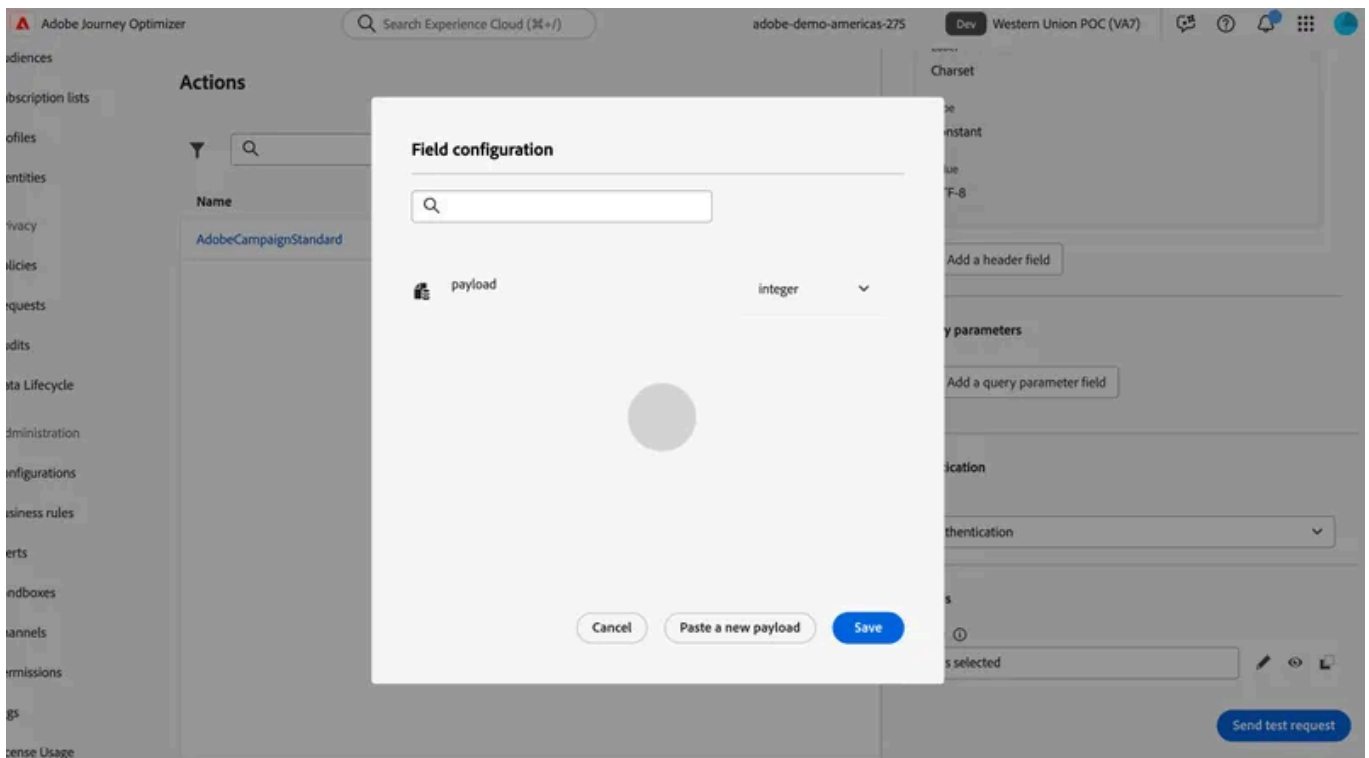
Our end point configuration is typically retrieved by our IT department or Marketing Technology teams. The information is typically authorization information, request/response headers, request/response body, query-string parameters, etc. Simply we will input this information which is standard to communicate to any API into the Endpoint Configurations.

- URL: `https://440115-191salmonscallop.adobeioruntime.net/api/v1/web/default/promocodelookup`
- Method: GET
- No custom headers or querystrings.

- No authentication.
- Click on the pencil next to the Response field.
- Copy and Paste the following payload into the Field Configuration screen. Click Save.

JSON

```
{  
  "payload": 87226  
}
```



Testing your Custom Action

- Click "Send Test Request".
- Click Send.
- Check the payload. You should see a random number in the Preview response. That number value is our promo code that needs to be displayed into our messages. This just validates our connection to the coupon code system.

Send a test request

Cancel Send

Headers

Content-Type	Content-Length	Connection	Server
application/json	17	keep-alive	adobe
Date	x-request-id	access-control-allow-origin	access-control-allow-methods
Tue, 15 Jul 2025 18:26:16 GMT	3e528545-5936-4f76-992d-2d7f41354bdb	*	OPTIONS, GET, DELETE, POST, PUT, HEAD, PATCH
access-control-allow-headers	x-openwhisk-activation-id	x-frame-options	x-content-type-options
Authorization, Origin, X-Requested-With, Content-Type, Accept, User-Agent	fd06ef3aba2c4dd786ef3aba2c6dd79e	deny	nosniff
x-xss-protection	perf-br-resp-out	x-gw-cache	X-Cache
1; mode=block	1752603976.308	MISS	Miss from cloudfront
Via	X-Amz-CF-Pop	X-Amz-CF-Id	
1.1	IAD89-P3	PoznmxHcc91BcTZ19fINAgECyZlP3Z4Wn0qKs-g0krVsjoc9Wm8Zjg==	
4d455abe9c408ddc198b94f7ff4a91ea.cloudfront.net (CloudFront)			

Preview

```
{ 1 Items
  "payload": int 49548
}
```

3.5.5. Configure Custom Action Journey

This lab will demonstrate how to use the custom action we just created. Keep in mind that this exercise relies on Event Based Journeys to be completed before tackling this part.

Add your Custom Action

1. Open your journey canvas.
2. Disconnect the push node from the condition node by click-grabbing the point of the connecting line between them and simply move it out to disconnect. (Figure 3)
3. On the condition node Push path, drag and drop your custom action node.
4. Add an alternative path in case of a timeout or error in our action.
5. Click Save.
6. Connect the Push back after the custom action.
7. Select the Category Marketing and PushNotifications as the configuration.
8. Edit Content.
9. Click on Content Template and Apply Content Template
10. Select UC2 - Abandonment Cart - Push Template.
11. Click on properties. In the body field, click on the personalization icon.
12. Attributes: Contextual Attributes
13. Click on the Folder: Journey Orchestration > Actions > Your Action.
14. Click on the Plus sign next to the payload attribute name.
15. Fix the way the token got introduced so it reads at the bottom of the message.
16. Click Save. Then X on the properties.
17. Only those who have our app will now receive a unique promo code.

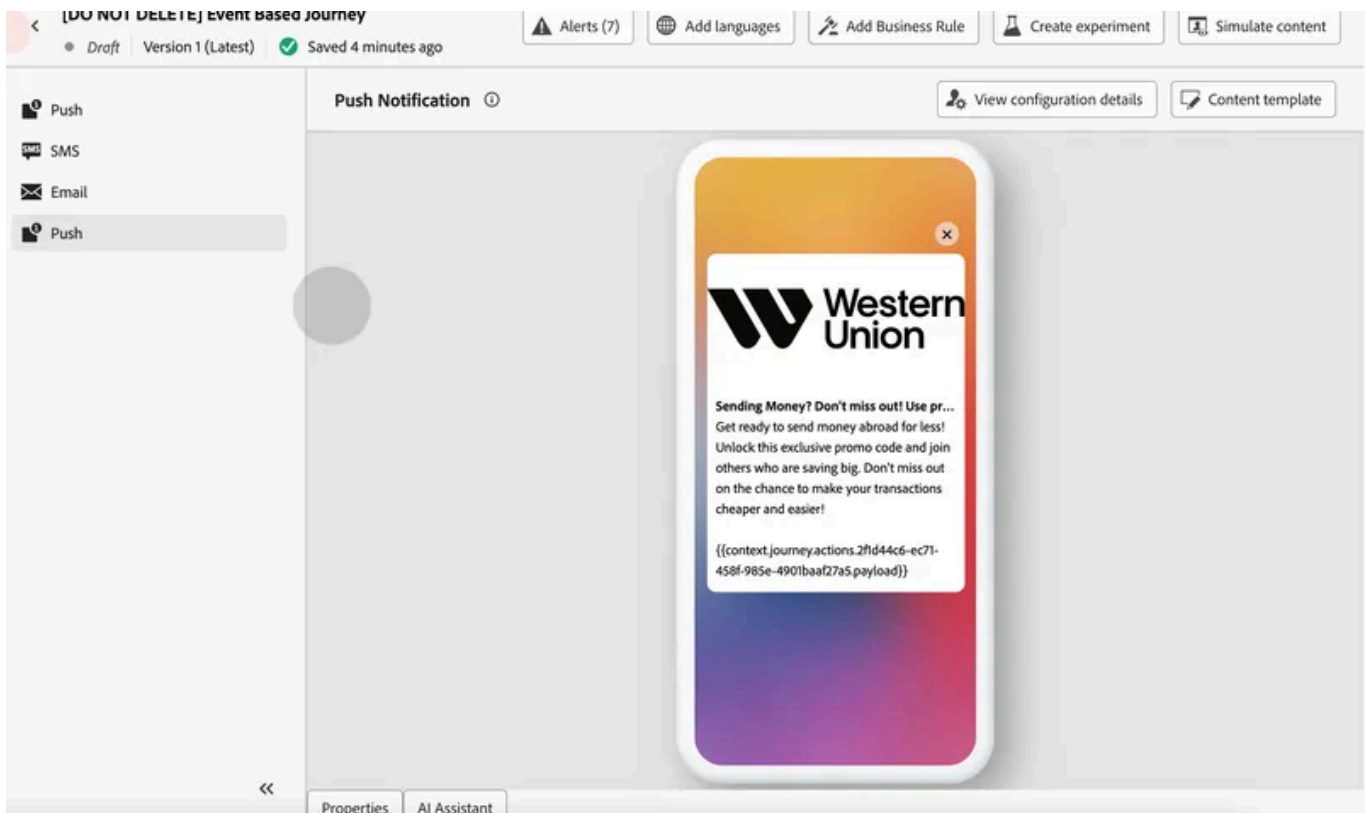


Figure 1

And your journey should look like this:

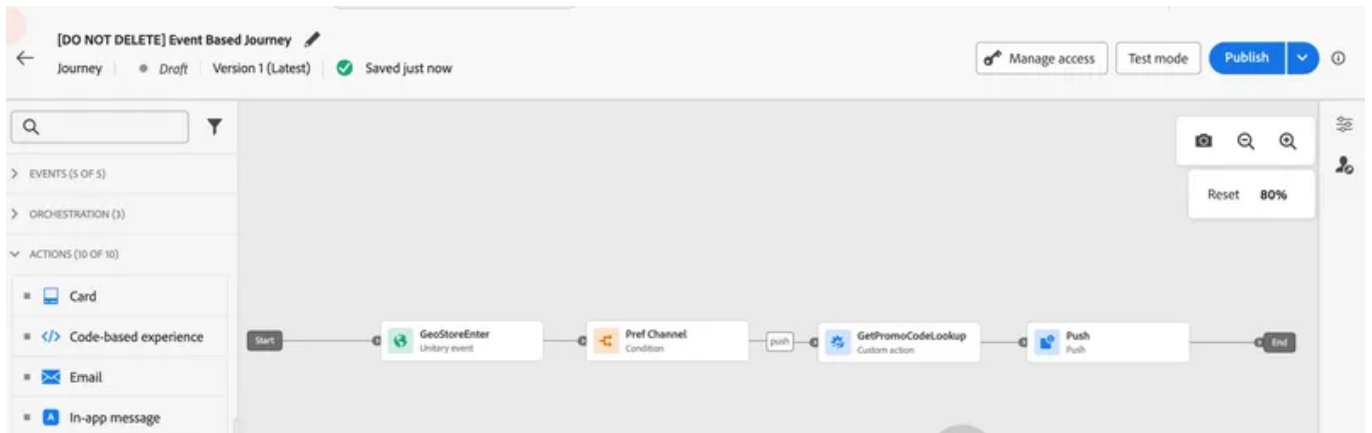


Figure 2

Congratulations. You have completed this lab.

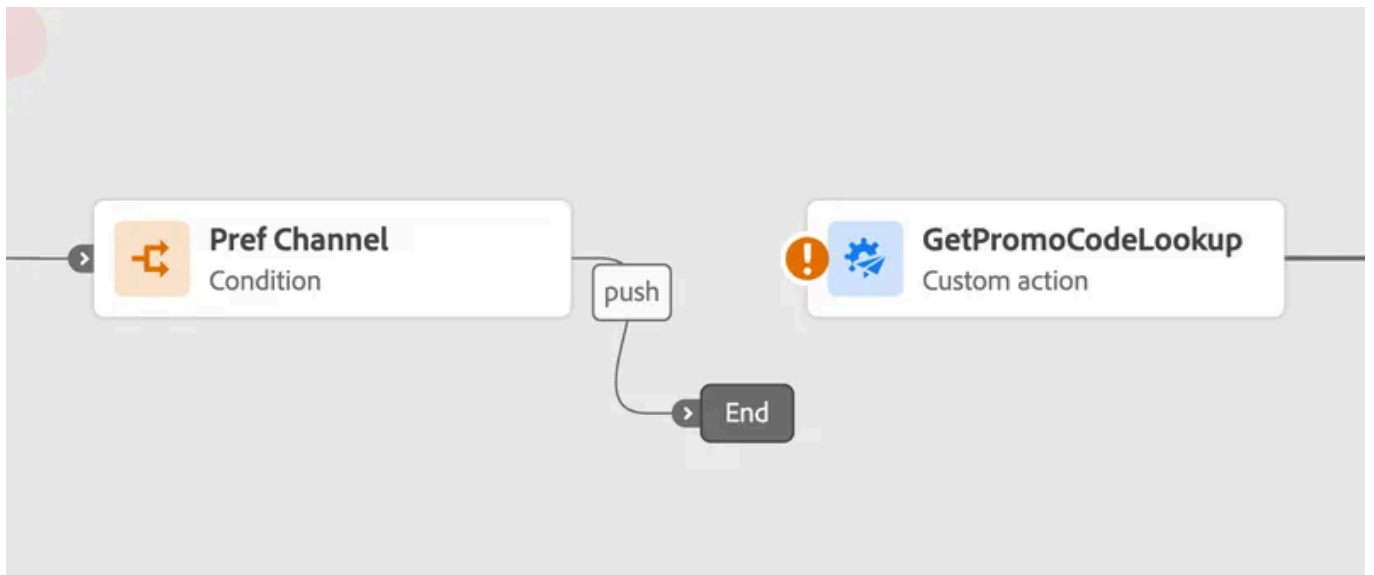


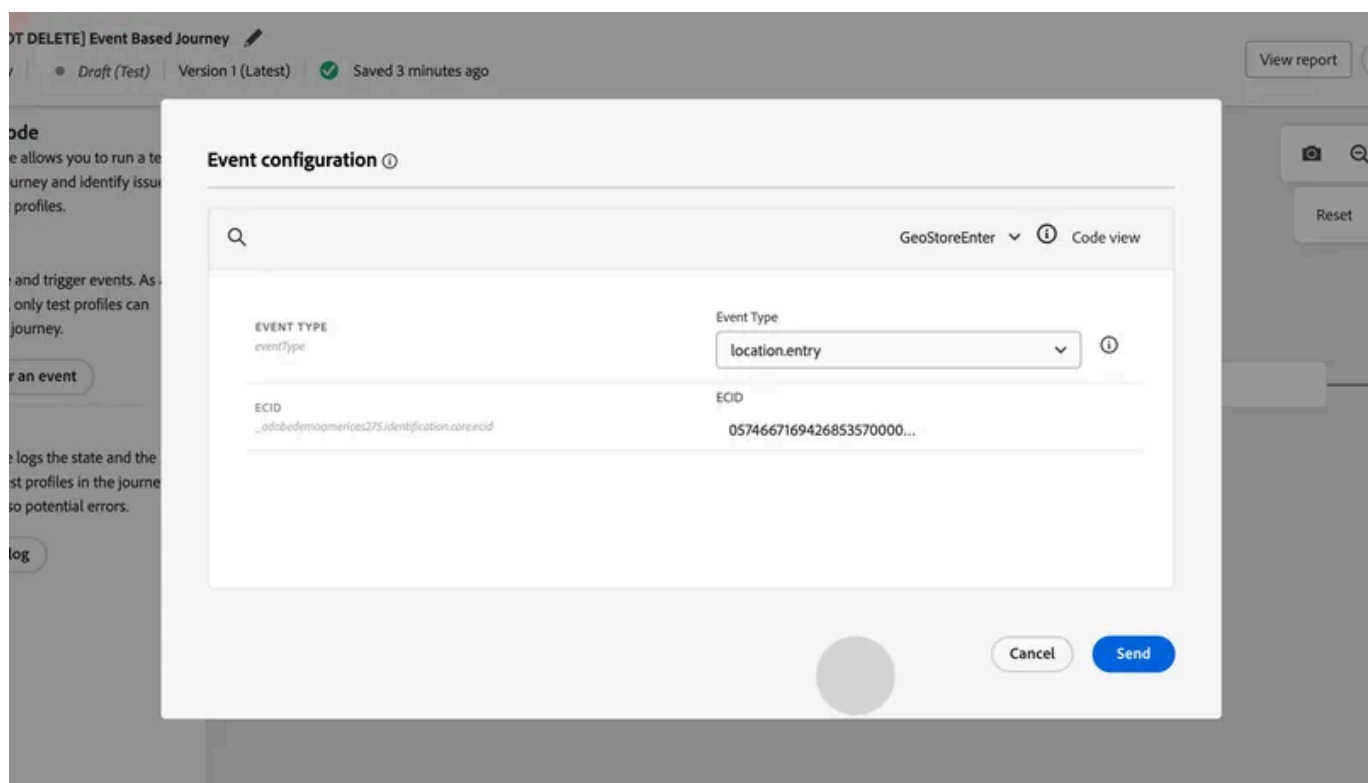
Figure 3

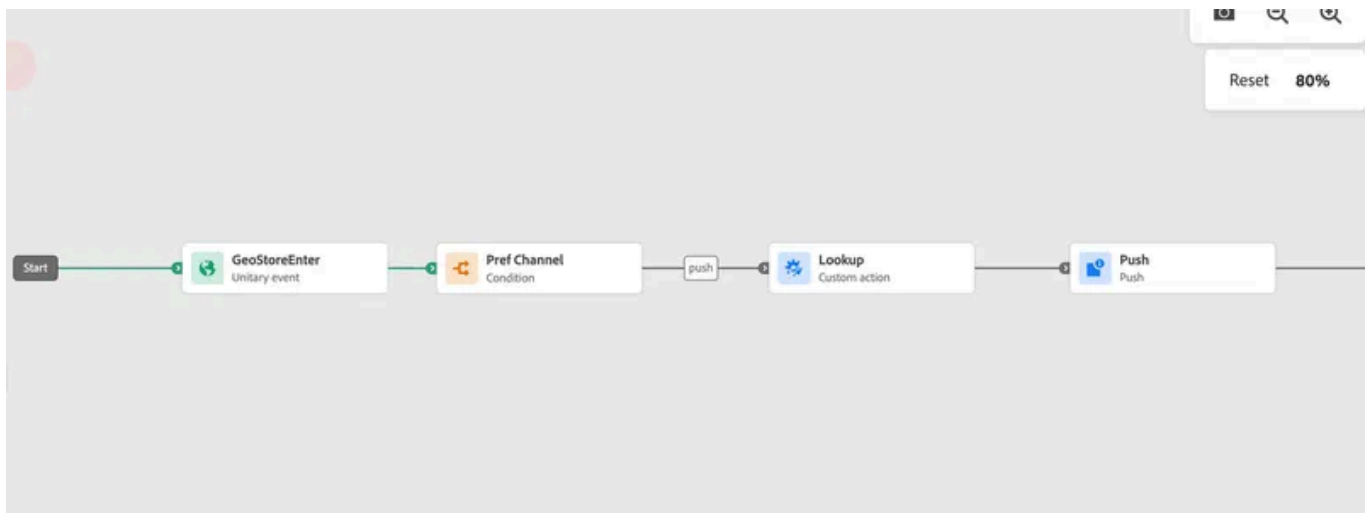
3.5.6. Validating Journeys in Test Mode

Test Mode allows the marketer to run thru a journey using a test profile and using the identity namespace setup by you entry node or simply put the node that starts a journey.

Enable Test Mode

- In the journey we created the event and the custom action. Enable the Test Mode toggle in the right top corner of your screen.
- Once you enter in test mode. Click on Trigger an Event.
- Event Type: location.entry
- ECID:
 - No Push Preference: 05746671694268535700000916107091849684
 - Push Preference: 65185324277654680062258772179107834368
- Click Send.





A Green Light will Appear As Soon As the Event is Fired

Click Close Test Mode on the top right corner to exit.

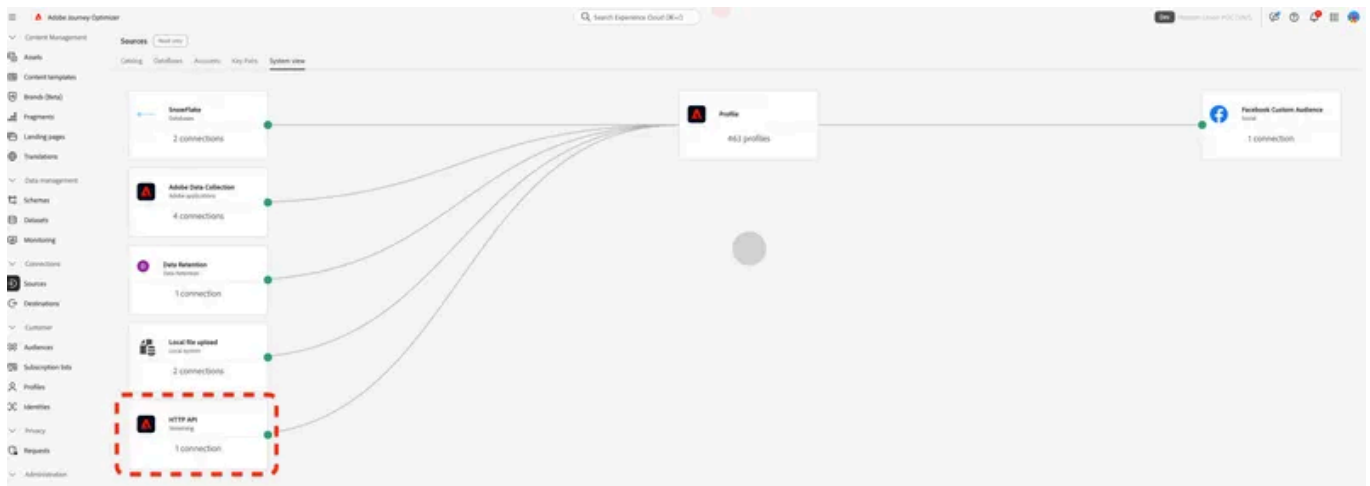
3.5.7. Trigger a Journey via API

It is recommended to go thru the following labs:

- Experience Events
- Event based Journeys
- Custom Actions
- Custom action Journey
- Test Mode

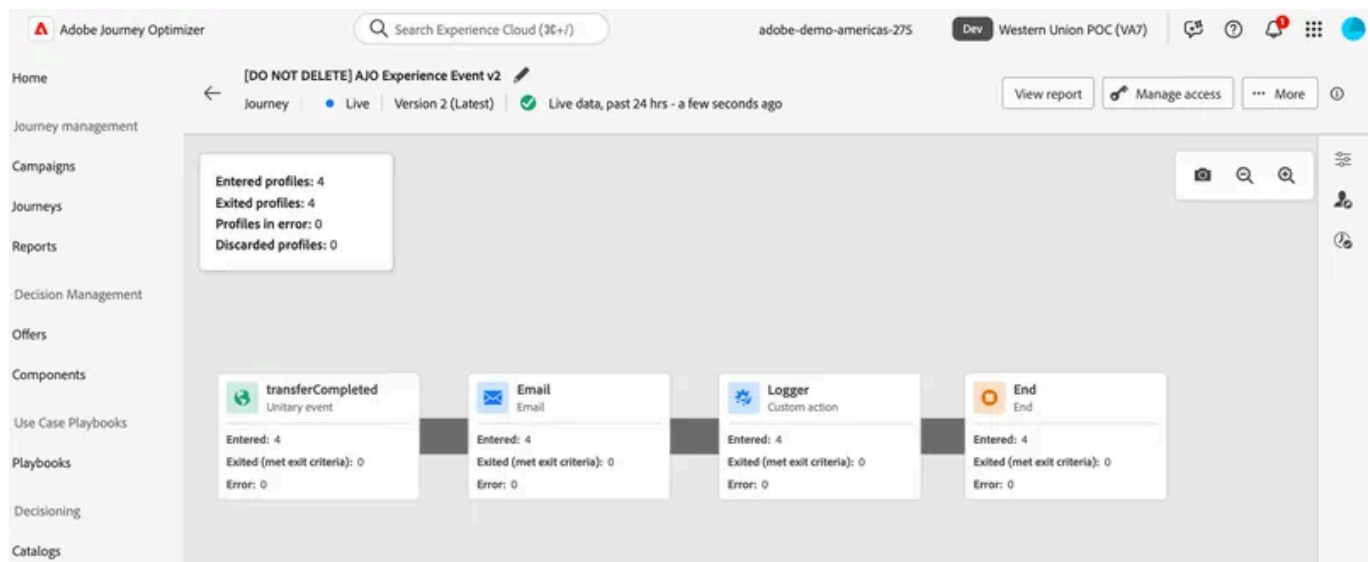
Lab Objective

During this lab we will in-personate a user that goes thru a Published journey. It will tie everything you learned so far together. We will trigger the journey using an API call mimicking our "Payment Transfer System" and a transfer completed event.



Journey Details:

A Journey has been created and has been published. **[DO NOT DELETE] AJO Experience Event v2**



Journey Composition

Experience Event

This journey is being triggered by an Experience Event that is being streamed by our fictitious "**Money Transfer System**". This system is in-charged of pushing specific transactions such as Transfer Started, Completed, Declined, etc... AJO is recieving these as experience events. This lab is focus on a transfer.completed event.

Email Action

The email template is going to use payload or context data that comes from the event to personalize the message. Ask your consultant if you want to see the emails you triggered.

Logger Custom Action

This custom action is a simple webhook that will log what we sent on the Experience event after the user recieves the email. Please check with your consultant if you want to see the emails you triggered as part of this excercise.

Demo Tooling

The Technical Validation team has created an Adobe App Builder project that helps us put together demos and help our customers perform validations. For example, today, we will be using a Postman like tool and a Webhook Tester feature. No worries. If you used postman before this is cake. Here is more information about [Adobe App Builder](#) .

Lab Instructions:

Tool Environment setup

Let's get prep to trigger the journey:

- Go to the [journey canvas](#)
- Click on the nine dot picker (top right of your screen) and **RIGHT** Click where it says **App Builder Catalog** and select **open in a new tab**.
- On the App Builder Catalog tab, click the name `440115-508CoralSquirrel` to go into the app.
- On the Nav menu, click **Utilities > API Monitor**
- On the session ID field copy this and paste it there
`dac63e33-c8ea-4021-a4b0-190a4d623d3f`
- Then click the Connect button.

Trigger the Journey

On the API Monitor tool in the Outbound API Calls tab set this configurations (We are making an HTTP request to AJO):

Method: Post

URL: `https://dcs.adobedc.net/collection/d48e98a7e68ab0ee19137012d20675ffe3e8b3f164444e84d921c375cfd65e5d?syncValidation=false`

This is a **Source** (HTTP API) which allows us to receive Profile and Event data into AJO using an HTTP API end point created in Experience Platform:

<https://experience.adobe.com/#/@adobedemoamericas275/sname:hol11-0725/journey-optimizer/platform/source/accounts?initialLoad=false&limit=20&page=1&sortDescending=1&sortField=created>

This source has also a dataflow which are the instructions that tell platform in which dataset to store the data in order to apply XDM:

<https://experience.adobe.com/#/@adobedemoamericas275/sname:hol11-0725/journey-optimizer/platform/source/dataflows/1138df63-71e9-4731-9d51-76f9d619903c/activity?initialLoad=true&limit=20&page=1&sortDescending=1&sortField=metrics.durationSummary.startedAtUTC>

This is the XDM Schema or the rules our event needs to abide in terms of structure and strong typed data:

<https://experience.adobe.com/#/@adobedemoamericas275/sname:hol11-0725/journey-optimizer/platform/schema/browse/https%3A%2F%2Fns.adobe.com%2Fadobedemoamericas275%2Fschemas%2F5256ce9982cbcfebbbaac1a51cf36166ffd4d7e6746599d94>

Copy and Paste the following into the Headers (JSON) field (clean the box first).

json



```
{
  "Content-Type": "application/json",
  "sandbox-name": "hol11-0725",
  "x-adobe-flow-id": "1138df63-71e9-4731-9d51-76f9d619903c",
  "Content-Length": "1196"
}
```

Copy and Paste the following into the Body (JSON) field (clean the box first.) Feel free to change the transaction details values before sending. **Do not change EventType.**


```
{
  "header": {
    "schemaRef": {
      "id": "https://ns.adobe.com/adobedemoamericas275/schemas/5256ce99"
      "contentType": "application/vnd.adobe.xed-full+json;version=1.0"
    },
    "imsOrgId": "59C7440F5DE147EA0A495EB3@AdobeOrg",
    "datasetId": "687a61427564712aef6284a3",
    "source": {
      "name": "Transfer Payment System"
    }
  },
  "body": {
    "xdmMeta": {
      "schemaRef": {
        "id": "https://ns.adobe.com/adobedemoamericas275/schemas/5256"
        "contentType": "application/vnd.adobe.xed-full+json;version=1"
      }
    },
    "xdmEntity": {
      "_adobedemoamericas275": {
        "identification": {
          "core": {
            "crmid": "00a63087-300c-452b-818a-4485faddad89"
          }
        },
        "transactionDetails": {
          "receiverCountry": "USA",
          "receiverName": "Juan",
          "senderCountry": "Mex",
          "senderName": "Phil",
          "transactionAmountDetails": {
            "amountSent": 32532.28,
            "amountToReceive": 22843.33,
            "payoutMethod": "pickup_cash"
          }
        }
      },
      "_id": "b323c0ec-ca4d-40a7-b547-642a4b692bda",
      "eventType": "transfer.completed",
      "timestamp": "2025-07-18T16:17:39.180Z"
    }
  }
}
```

Hit Send.

Outbound API CallsInbound WebhooksHelp & Documentation

Make Request

MethodURL

POSThttps://dcs.adobedc.net/collection/d48e98a7e68ab0ee19137012d20675ffe3e8b3f164444e84d921c375cfd65e5d?syncValidation=false

Send

Headers (JSON)Request Body

""Content-Length": "1196""}

}

Timeout (seconds)

3030s

Request History (4)

RefreshClear

	Time	Met...	URL	Status	Respon...	Size
☒	1:30:29 PM	POST	https://dcs.adobedc.net/collection/d48e98a7e68ab0ee19137012d20675ffe3e8b3f164444e84d921c375cfd65e5d?syncValidation=false	200	56ms	208B
☐	12:24:04 PM	POST	https://dcs.adobedc.net/collection/d48e98a7e68ab0ee19137012d20675ffe3e8b3f164444e84d921c375cfd65e5d?syncValidation=false	200	36ms	208B
☐	12:23:29 PM	POST	https://dcs.adobedc.net/collection/d48e98a7e68ab0ee19137012d20675ffe3e8b3f164444e84d921c375cfd65e5d?syncValidation=false	200	68ms	208B
☐	12:18:02 PM	POST	https://dcs.adobedc.net/collection/d48e98a7e68ab0ee19137012d20675ffe3e8b3f164444e84d921c375cfd65e5d?syncValidation=false	200	31ms	208B

Request Details

RequestResponseHeaderscURL

Status: 200 OK

Response Time: 36ms

Size: 208 bytes

Response Body:

{

"flowId": "1138df63-71e9-4731-9d51-76f9d619903c",

"inletId": "d48e98a7e68ab0ee19137012d20675ffe3e8b3f164444e84d921c375cfd65e5d",

"receivedTimeMs": 1752855844257.

}

Custom Action Validation

The above steps just trigger an event to AJO, so our journey should have then trigger a call to our logger.

Click on Inbound Webhooks tab, and hit refresh button. These are the records our logger custom action is recieving from AJO as users traverse the journey.

[Outbound API Calls](#) [Inbound Webhooks](#) [Help & Documentation](#)

Webhook Endpoint

Use this URL to receive webhook calls from external systems:

`https://440115-508coralsquirrel.adobeio-static.net/api/v1/web/dx-excsHELL-1/webhook-receiver/dac63e33-c8ea-4021-a4b0-190a4d623d3f`

Copy URL

Test

Tip: This endpoint accepts all HTTP methods (GET, POST, PUT, DELETE, etc.) and will log all incoming requests with full details including headers, body, and client information.

Webhook History (7)

Refresh

Clear

	Time	Met...	Path	Client IP	Status	Size
☒	1:04:25 PM	post	/dac63e33-c8ea-4021-a4b0-190a4d623d3f	52.254.106...	200	219B
☐	12:24:07 PM	post	/dac63e33-c8ea-4021-a4b0-190a4d623d3f	52.254.106...	200	219B
☐	12:23:32 PM	post	/dac63e33-c8ea-4021-a4b0-190a4d623d3f	52.254.106...	200	219B
☐	12:17:59 PM	post	/dac63e33-c8ea-4021-a4b0-190a4d623d3f	52.254.106...	200	219B
☐	11:52:00 AM	post	/dac63e33-c8ea-4021-a4b0-190a4d623d3f	52.254.105...	200	219B
☐	11:47:29 AM	post	/dac63e33-c8ea-4021-a4b0-190a4d623d3f	52.254.106...	200	180B
☐	11:46:30 AM	post	/dac63e33-c8ea-4021-a4b0-190a4d623d3f	108.87.184...	200	219B

Webhook Details

RequestResponseHeadersMetadata

Method: post

Path: /dac63e33-c8ea-4021-a4b0-190a4d623d3f

Client IP: 52.254.105.192, 34.201.117.42, 130.176.179.208, 10.152.171.205

User Agent: Amazon CloudFront

Request Body:

```
{  
  "transactionDetails": {
```

Journey Validation

If you refresh your journey canvas, you will see that the count of users that passed in the journey has incremented.

[DO NOT DELETE] AJO Experience Event v2

Journey

Live

Version 2 (Latest)

Live data, past 24 hrs - a few seconds ago

View report

Manage access

More

Entered profiles: 5
Exited profiles: 5
Profiles in error: 0
Discarded profiles: 0

transferCompleted
Unitary event

Entered: 5
Exited (met exit criteria): 0
Error: 0

Email
Email

Entered: 5
Exited (met exit criteria): 0
Error: 0

Logger
Custom action

Entered: 5
Exited (met exit criteria): 0
Error: 0

End
End

Entered: 5
Exited (met exit criteria): 0
Error: 0

3.5.8. Trigger a Campaign via API

During this lab we will be able to create our own unique API triggered campaign. We will use the email channel on a transactional channel configuration. This is to guarantee the email is sent to the email address you desire.

Duplicate a Campaign

- Go to **campaigns** using the navigation menu on the left rail
- Click on API Triggered tab.
- Click the campaign name **API Triggered Email w/ Context Data**
- Review the details of the campaign.
- Copy the campaignId to your clipboard.
- Notice the cURL request section. This is the information our developers will need to call the API to be triggered.
 - Notice the context property. This is where we pass the sender name.

The screenshot displays the Adobe Campaign user interface for a specific campaign. At the top, the campaign name 'API Triggered Email w/ Context Data' is shown, along with its status 'Live' and a timestamp 'Saved 11 minutes ago'. Action buttons include 'Manage access', 'Simulate content', 'Reports', 'Duplicate', 'Modify campaign', and 'Stop campaign'.

The 'Campaign statistics' section shows three metrics: 1 Targeted, 1 Actions delivered, and 0 Actions failed. The 'Content' section displays a preview of the email content, which includes a header for 'The Marketing Team' from 'demo7@mail.technicaladobe.com', a subject line 'Take advantage, {{context.senderName}}', and a promotional image with the text 'Act quick! This offer only lasts for 24 hours!'. The footer contains a personalized greeting: 'Hi {{first_name_start_email}} {{context.senderName}}'.

The 'Properties' section provides detailed information about the campaign, including its ID (45369857-dcaa-4124-b83d-88904698baf8), version ID (bc08525b-d04b-4b14-afc7-19b43325d81e), category (Transactional), and access management labels (No labels selected). It also shows business rules (No rule sets selected) and tags (No tags selected).

The 'Actions' section lists the campaign's action ID (779e3dbb-bede-4f0a-92ce-70139b38f42b), channel (Email), and configuration (TransactionalEmail). It also indicates that action tracking is enabled for email opens and clicks on links and buttons.

Trigger the Campaign

Campaigns are secured by default. You must have proper authorization to call a campaign API. However, we have facilitated a UI that was built by the Technical Validation team. The UI was built using [Adobe App Builder](#) and is an standalone app. It uses Experience Cloud APIs to communicate. It has enough access to allow the trigger of a campaign.

- From the review campaign page in AJO, click on the nine dot picker icon (top right corner).
- **RIGHT** click on App Builder Catalog and select open in a new tab.
- Click on the 440115-508CoralSquirrel app.
- Click AJO Actions from the menu.
- Place your email address that you would like the campaign to send the email.
- Copy the campaign ID from the campaign details on AJO and paste it in the Campaign ID field on the form. (You might still have it in your clip board)
- Click Add Key-Value Pair
- Add senderName on the "Key" field.
- Add your name on the "value" field.
- Click Submit, and wait for the email to arrive. Check your junk folder. Also remember to refresh the page of the campaign in AJO so you can see the count increment as you test it.

Americas 275 X

Home

▼ AEP Functions

▼ AJO Actions

Campaign Trigger

> AI Tooling

> Utilities

Western Union Campaign Trigger Form

Saved Configurations

Save Current Configuration

No saved configurations yet

Email Address * *

Campaign ID * *

Context Data

☐ Advanced Mode (JSON Editor)

RemoveAdd Key-Value Pair

4. CJA Reporting

4.1. Introduction

Welcome to Customer Journey Analytics

Customer Journey Analytics (CJA) is a person-based, non-technical analytics tool which may be joined with Adobe Journey Optimizer (AJO) data. The integration between CJA and AJO automatically generates dimensions and metrics such as Journey, Message, Sends, Clicks, Opens, Bounces etc. CJA person-event stitching can then join these fields with downstream value events such as Money Sends, Account Funding Events, or any other essential customer behavior. CJA also adds behavioral dimensions to the mix including web, CRM, and call-center components.

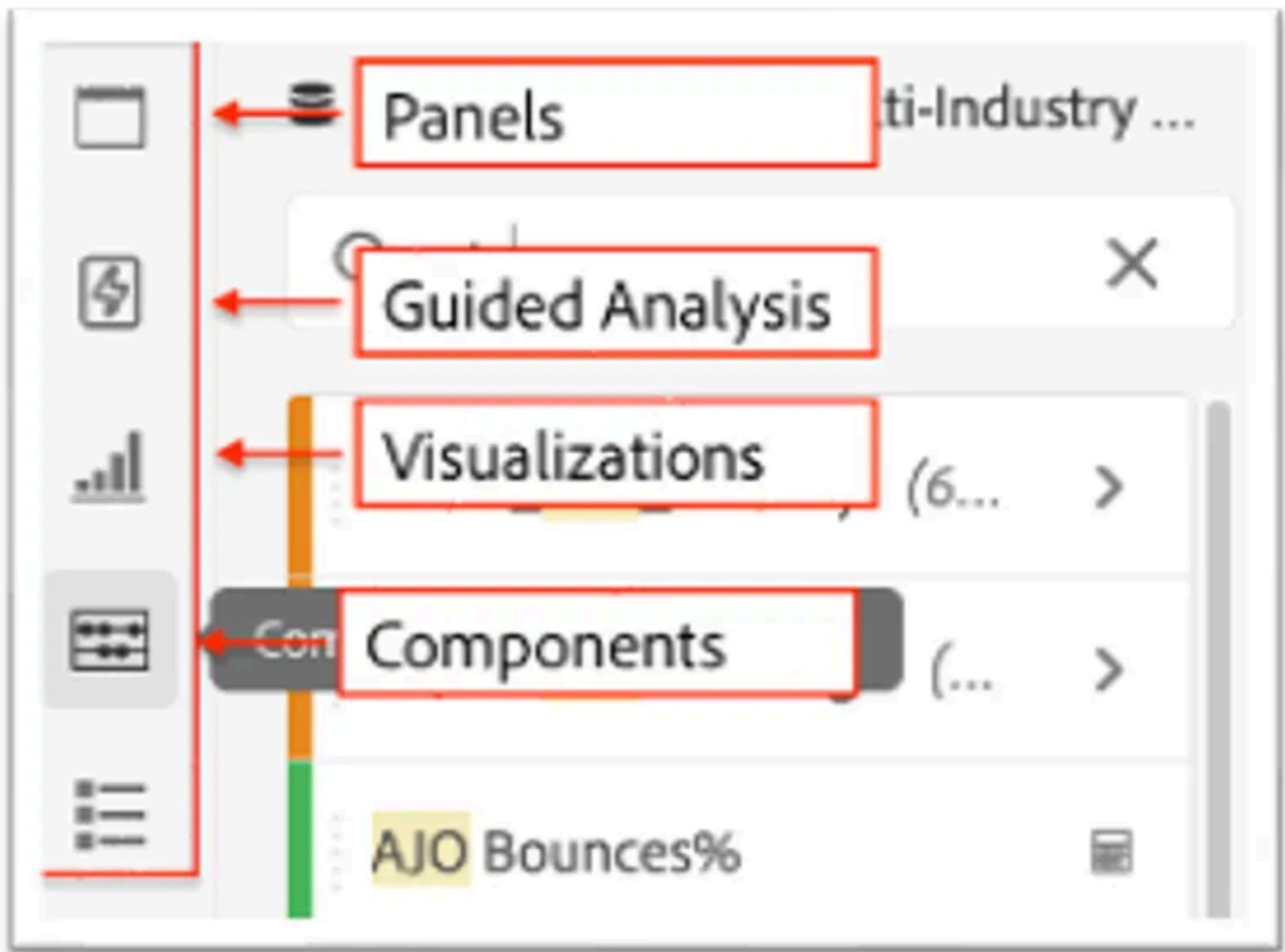


Figure 1: CJA Workspace Left-Rail Navigation

Panels are groups of tables and visualizations that share a date range and Data View (collection of components with specific settings)

Guided Analysis are pre-built analysis that are common across sophisticated client settings.

Visualizations quickly enable visualizations such as flow and funnel analysis.

Components include the dimensions and metrics specific to a client business situation such as page type, device type, sessions, people, conversions, etc.

4.2. Abandoned Transaction Journey

Holdout Experiment Panel Setup

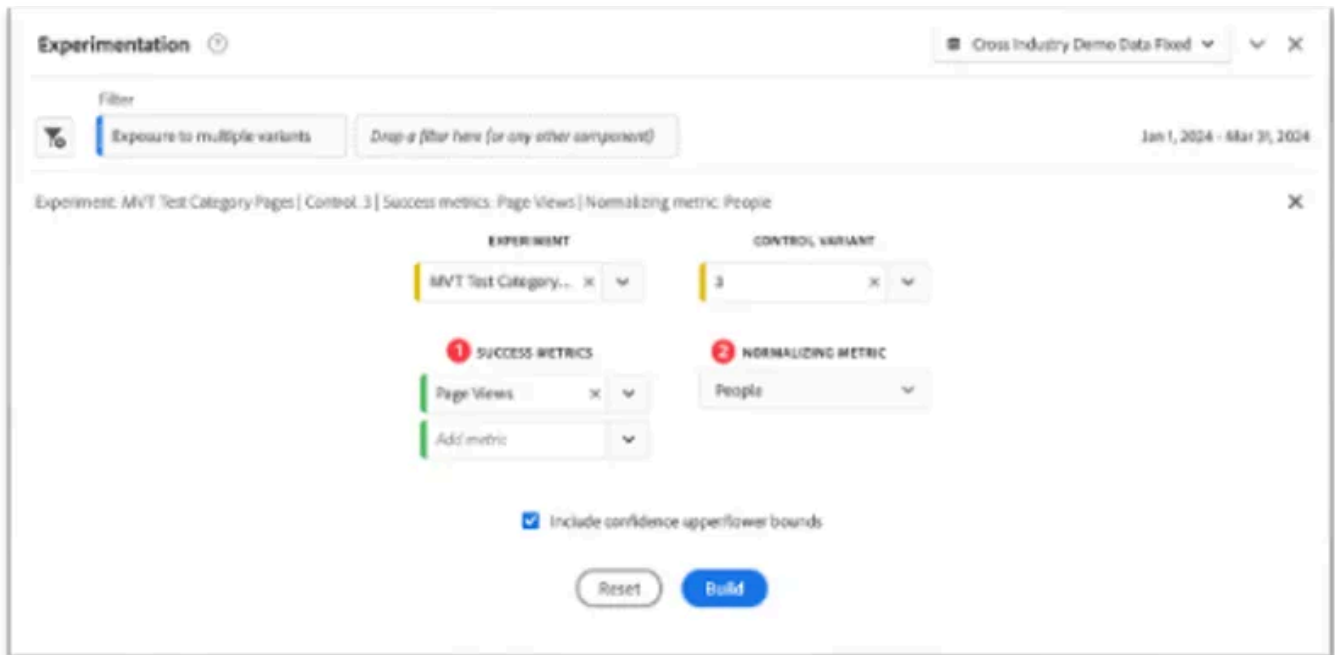


Figure 2: Experimentation Panel setup with Experiment and Experimentation Variant components

- Drag an Experiment Panel onto the provided Workspace Project
- Select Experimentation Experiment and Variant dimension inputs from the components sidebar at left
- Press "Build"
- A full view of the experiment findings will appear

Full-Funnel Report

1. Navigate to Guided Analysis menu
2. Add AJO Sent, AJO Open, AJO Click and Money Send as funnel steps
3. Compare funnel performance to past date range at top
4. Compare Desktop to Mobile users with Segments at bottom

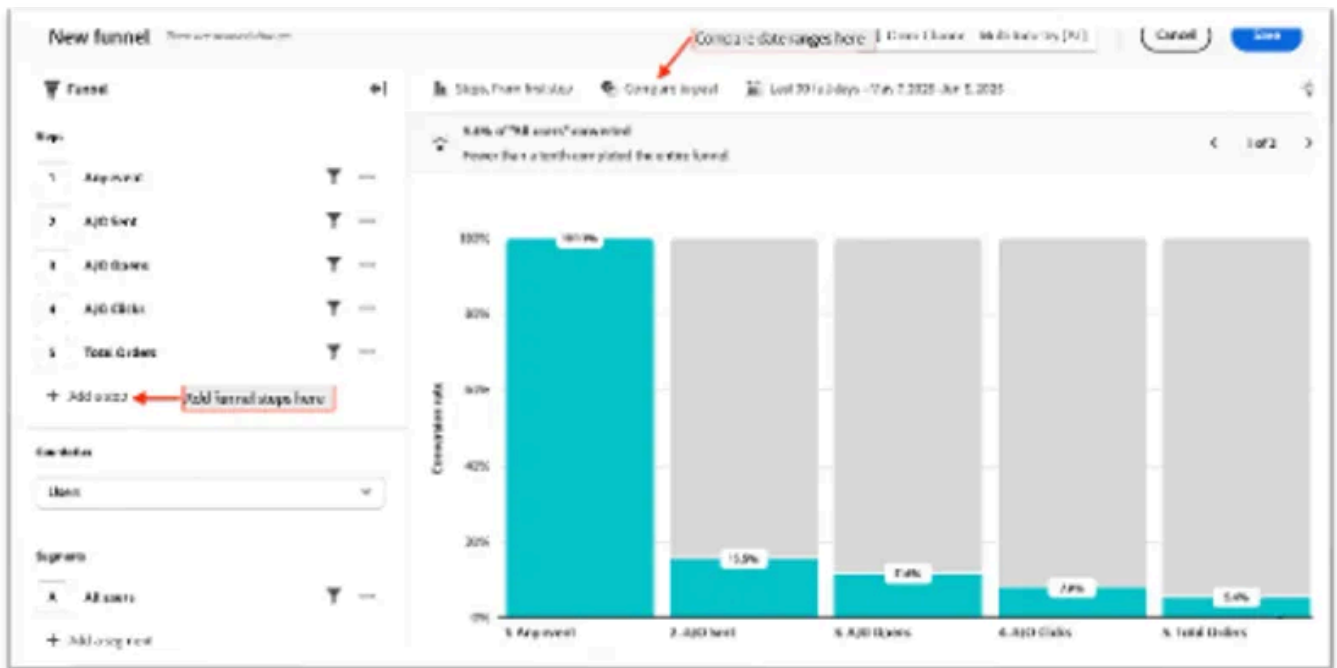


Figure 3: Funnel Guided Analysis

4.3. Low Balance Notification for Digital Banking Customers

Create Low Balance Journey analysis

- Add a Freeform Table to Workspace panel from the Visualizations menu



Figure 4: Adding a new Freeform Table to a Workspace Panel

- Drag AJO Targeted, AJO Sends, Opens, Clicks, and Account Funds to the table
- Create an Account Funds/Clicks Ratio using Calculated Metrics
- Create an Account Funds/Targeted Metric using Calculated Metrics
- Visualize total Account Funds by AJO Journey with a Donut Report



Figure 5: Adding AJO Journey dimension to a freeform table

5. **AI Assistant Challenge**

5.1. **Adobe Journey Optimizer AI Assistant and GenAI**

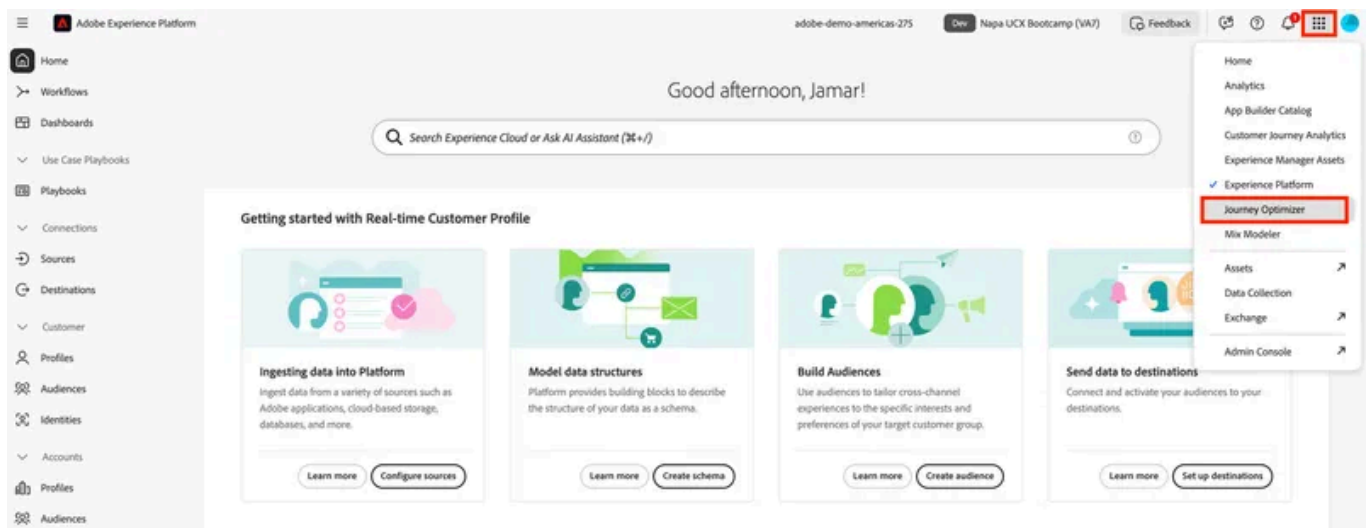
AI Assistant and GenAI in AJO

AI Assistant is a conversational experience that allows practitioners to perform tasks at a fast pace. Whether the task is to understand concepts, troubleshoot problems, or search through information. AI Assistant also allows non-experts to perform expert tasks and increases the overall quality of work.

The AI Assistant in Adobe Journey Optimizer is trained on its Adobe Experience League documentation. When asked a question, AI Assistant responds with a helpful answer that enables quick learning.

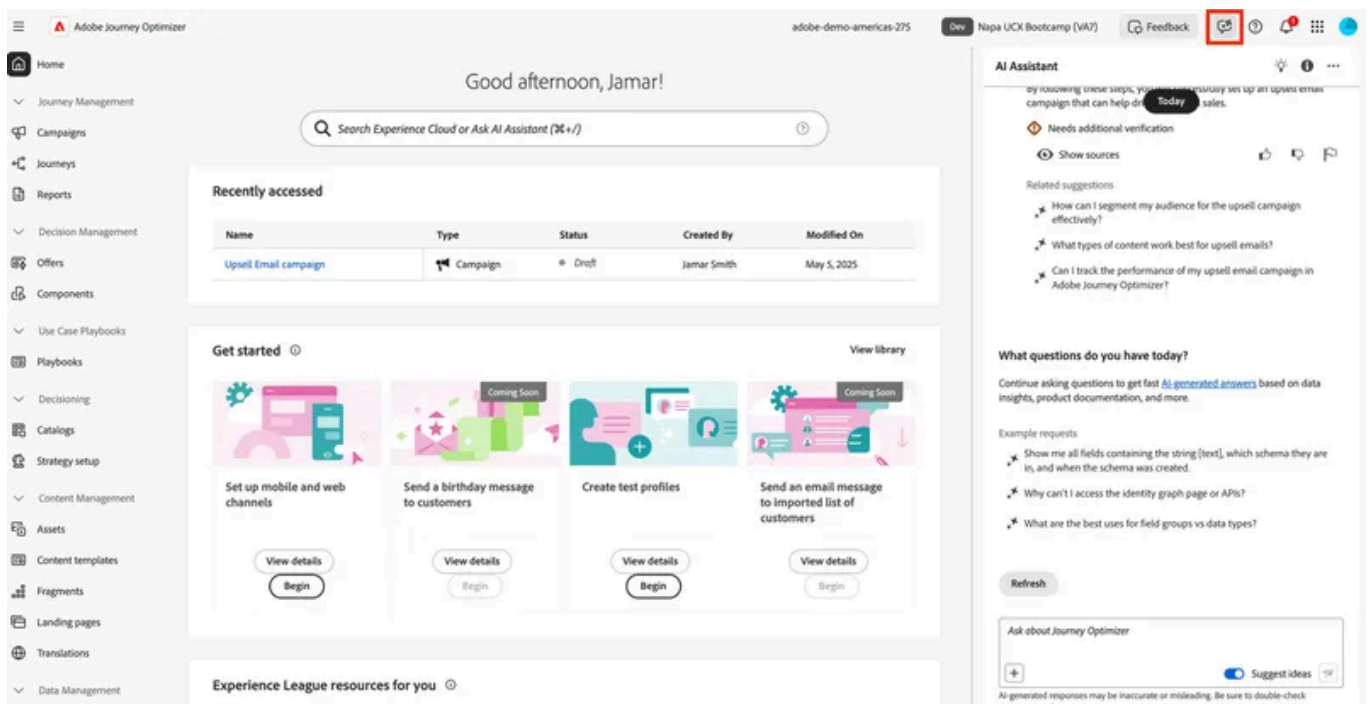
Navigate to Journey Optimizer

- Click on the 9-dot picker and select **Journey Optimizer**.



Create Email Campaign Using AI Assistant and GenAI

- The goal of this exercise is to have fun with using the AI features in Adobe Journey Optimizer.
- Start by using AI Assistant to get started with creating a campaign in AJO. There will be more details about AJO later in the bootcamp, but in short we are creating a one-time blast email campaign.
- To get started with AI Assistant you need to click on the chat box with a star icon in the top right corner. This will launch AI Assistant in AJO for you.



- Now you can ask the AI Assistant: **How do I create a campaign?**

adobe-demo-americas-275

Dev

Napa UCX Bootcamp (VA7)

Feedback

?

Modified On

May 5, 2025

View library

Coming Soon

and an email message

mported list of

tomers

View details

Begin

AI Assistant

Today

How do I create a campaign?

To create a campaign, follow these steps:

- 1. Access the Campaigns Section:** On the left side navigation, click on "Campaigns." This will take you to the repository of campaigns that have already been created.
- 2. Create a New Campaign:** Click on the "Create Campaign" button located at the top right of the page.
- 3. Select Campaign Type:** Choose the type of campaign you want to execute. You can select either a scheduled campaign for marketing messages or an API-triggered campaign for marketing or transactional messages.
- 4. Choose the Message Channel:** Depending on your campaign type, select the applicable message channel. For example, if you are creating a scheduled campaign, you might choose in-app messaging or another channel.
- 5. Define Campaign Properties:** On the properties page, provide a custom title and, if desired, a description for your campaign.
- 6. Configure Audience and Schedule:** Specify the audience you want to target and set the start and end dates for your campaign. If you are creating an API-triggered campaign, ensure that the targeted [profiles](#) are defined in the API call.
- 7. Edit Content:** Click the "Edit content" button to customize the message you want to send. You can also pass additional data into the API payload for personalization if applicable.
- 8. Finalize and Activate:** Once you have configured all necessary settings, review your campaign and click the appropriate button to activate it.

Ask about Journey Optimizer

+

☒ Suggest ideas

AI-generated responses may be inaccurate or misleading. Be sure to double-check

- Follow steps 1 and 2 from the AI Assistant. When prompted you will be creating a **Scheduled - Marketing Campaign**.

Now let's start to put together the campaign:

- Name: Upsell Customers Who Spent \$100 or More + Initials +User Number

← **Upsell Customers Who Spent \$100 or More JS00** Manage access Review to activate

Campaign | ● Draft | ✓ Saved just now

Properties

Actions

Audience

Content experiment

Schedule

Properties * Required

Name *

Upsell Customers Who Spent \$100 or More JS00

Add name...

Description

Add description...

Access management labels ⓘ

No labels selected

Campaign type

Scheduled

Category

Marketing

Tags

▼

- Click on **Add action** and select **Email**.

Actions

Select an action to activate for this Campaign

+ Add action

Code-based experience

Direct mail

Email

In-app message

Content Card

Push notification

SMS

Web

WhatsApp

Audience

Select recipients of this campaign

Identity type ⓘ

ECID

Schedule ⓘ

- Click on Email configuration and select **EmailMarketing**.

Actions



Email

Edit content



Action name

Email - 1

Email configuration *



EmailMarketing

Action tracking

- ☒ Track email opens
- ☒ Track clicks on links and buttons in email

- Now that we have our email channel setup for our campaign let's add our audience before we create our email content. Click on **Select audience**.

Audience

Select recipients of this campaign

Select audience

Identity type ?

ECID



- The select **Luma - Recent Purchases over \$100** audience then click **Save**.

Select Audience

selected

Close

Save



Name	Profile count	Origin	↓ Update time
☐ Platinum Loyalty Cart Abandoners in ...	-	Segmentation Service	04/29/2025, 09:24 AM
☐ Luma - Interested in Equipment's Cat...	-	Segmentation Service	04/08/2025, 09:54 AM
☐ Luma - Summer purchases with a rec...	-	Segmentation Service	04/08/2025, 09:54 AM
☐ Luma - in-store abandoners	-	Segmentation Service	04/08/2025, 09:54 AM
☐ Luma - Gold Luma+ Members	16	Segmentation Service	04/08/2025, 09:54 AM
☐ Luma - Platinum Luma+ Members	21	Segmentation Service	04/08/2025, 09:54 AM
☐ Luma - Mobile App Users	-	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Silver Luma+ Members	25	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Registered users	100	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Men's Category Interest	-	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Not Luma+ Members	4	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Blue Luma+ Members	18	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Recent Purchase over \$100	-	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Interested in Yoga	-	Segmentation Service	04/08/2025, 09:53 AM
☐ Luma - Women's Category Interest	-	Segmentation Service	04/08/2025, 09:53 AM

- Now click on Edit Content under Actions. This is where we will start to use GenAI features to create a subject line and images in our email.
 - Your campaign should offer a free item on their next purchase or a special discount. In this example we will be offering a free pair of sunglasses on their next purchase.

Actions



Email

Action name

Email - 1

Email configuration *

EmailMarketing



Select or create new configuration

Edit content



Action tracking



Track email opens



Track clicks on links and buttons in email

- For the subject line click on the wand next to the box.

Upsell Customers Who Spent \$100 or More JS00

Campaign | Draft | Saved a few seconds ago

Alert... Add lang... Add Business Rule Create experiment Simulate

Email

View configuration details Content template

The Marketing Team
From: hol4.no-reply@mail.techvaladobe.com

No email preview available

Header

From name
The Marketing Team

From email
hol4.no-reply@mail.techvaladobe.com

Subject line
No email subject line defined

Body

Use the Email Designer for visual editing or uploading HTML

Edit email body

- Create a prompt. Have as much fun here and create a silly subject line. Once you completed your prompt, click on **Generate**. Select the variation you like best then click **Select**.
 - Example: **Make a humorous take on getting a free pair of sunglasses for being a great customer.**
 - Test multiple prompts and/or refine.

Upsell Customers Who Spent \$100 or More JS00

Alert...Add lang...Add Business RuleCreate experimentSimulate

CampaignDraftSaved a few seconds ago

EmailView configuration detailsContent template

Generate Subject Line

Enable experimentationCancelSelect

Settings

Use reference content

Generate variations based on this reference content.

Prompt *

Make a humorous take on getting a free pair of sunglasses for being a great customer.

Describe what you'd like to generate.

Include pre-header

Text settings

None

Brand assets

None

Generate

AI generated responses may be inaccurate. Please evaluate outputs for accuracy and appropriateness to your use case. See the [Adobe GenAI 11x11 Guidelines](#).

Original Content

☒ Variation 1

Refine

Like

Dislike

Flag

Grab Your Free Sunnies, You Cool Cat 🐱

☐ Variation 2

Refine

Like

Dislike

Flag

Shade Alert! Claim Your Free Sunglasses 🕶️

☐ Variation 3

Refine

Like

Dislike

Flag

Shade Alert: Your Free Sunglasses Await!

☐ Variation 4

Refine

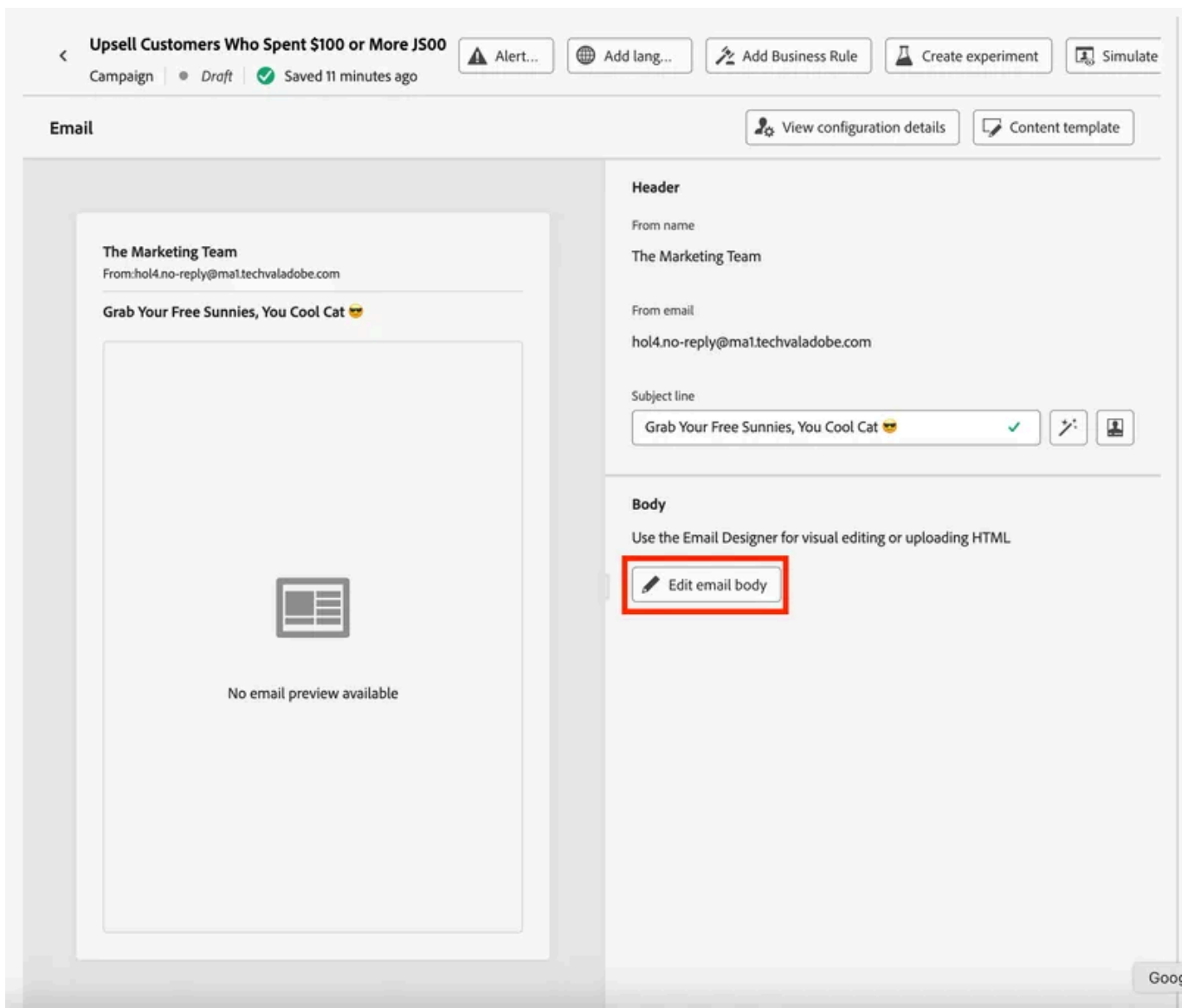
Like

Dislike

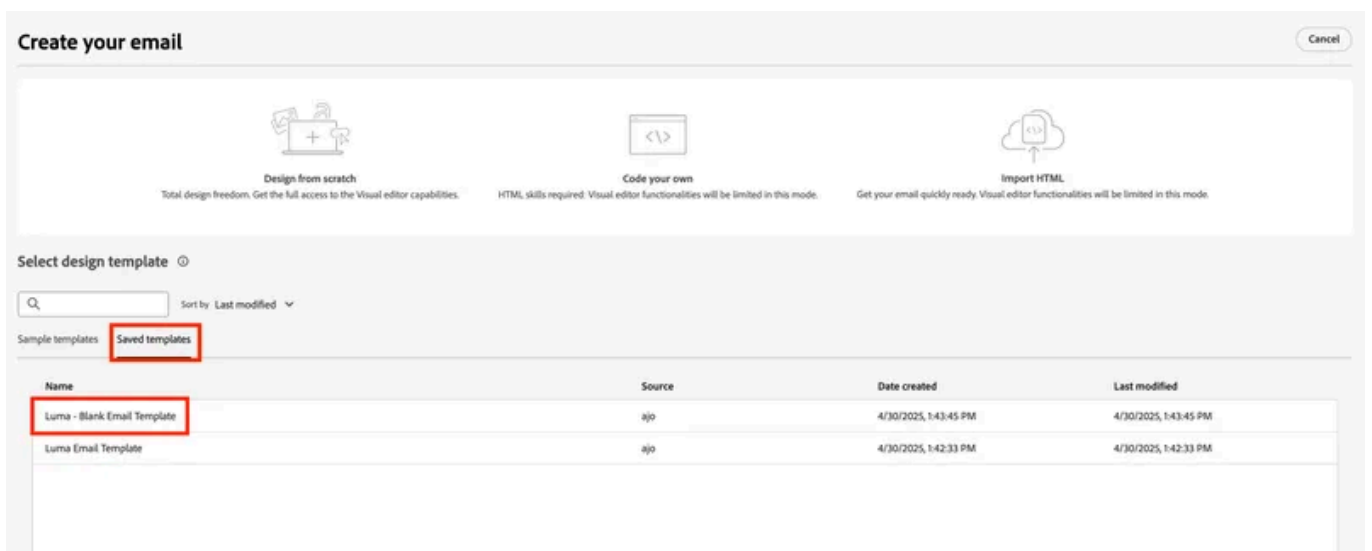
Flag

Shade Alert! Free Sunnies for Our Coolest Customer 🕶️

- Once you have generated your subject line, select **Edit email body**.



- Select **Saved templates** and click on **Luma - Blank Email Template**.



- Then click on **Use this template**.

Select design template

Close

Use this template



- Click on the blank email hero then select **Generate and select an image** under Firefly. Have fun with this and be ridiculous in your prompt. Click on **Generate** then **Select** once you have an image you want to use.
 - Example: **Create a cool cat wearing sun glasses while being a DJ.**
 - Test multiple prompts and/or refine.

Generate Image

Enable experimentation

Cancel

Select

Settings

Reference style

Generate variations based on this reference content.

Prompt

Create a cool cat wearing sun glasses while being a DJ

Describe what you'd like to generate.

Image settings

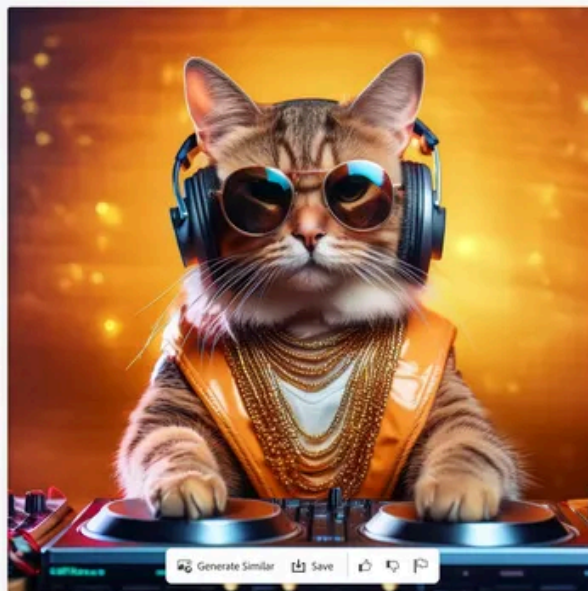
Aspect ratio

Brand assets

None

Generate

As generated responses may be inaccurate. Please evaluate outputs for accuracy and appropriateness to your use case. See the [Adobe GenAI User Guidelines](#).



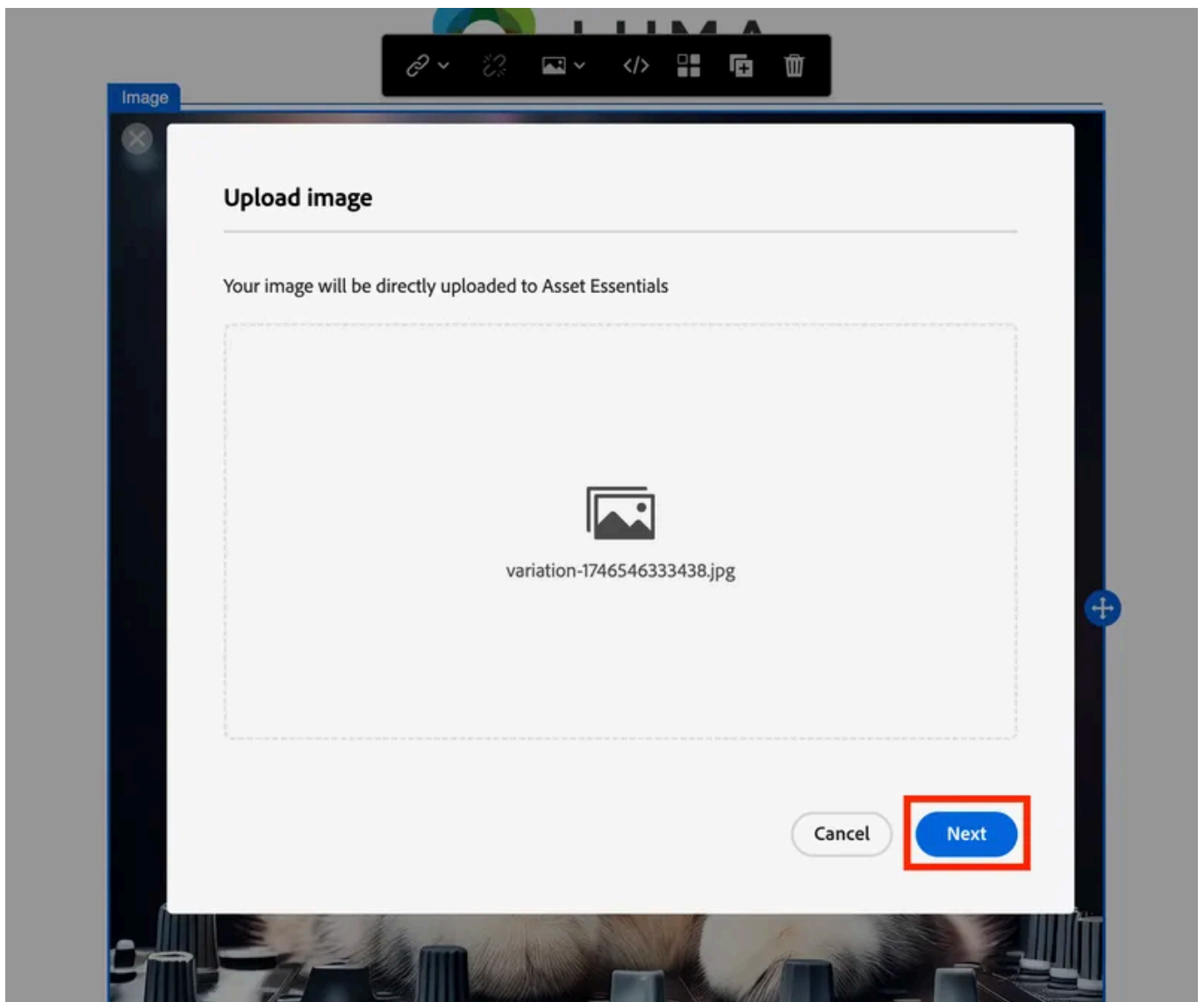
Original



Variations



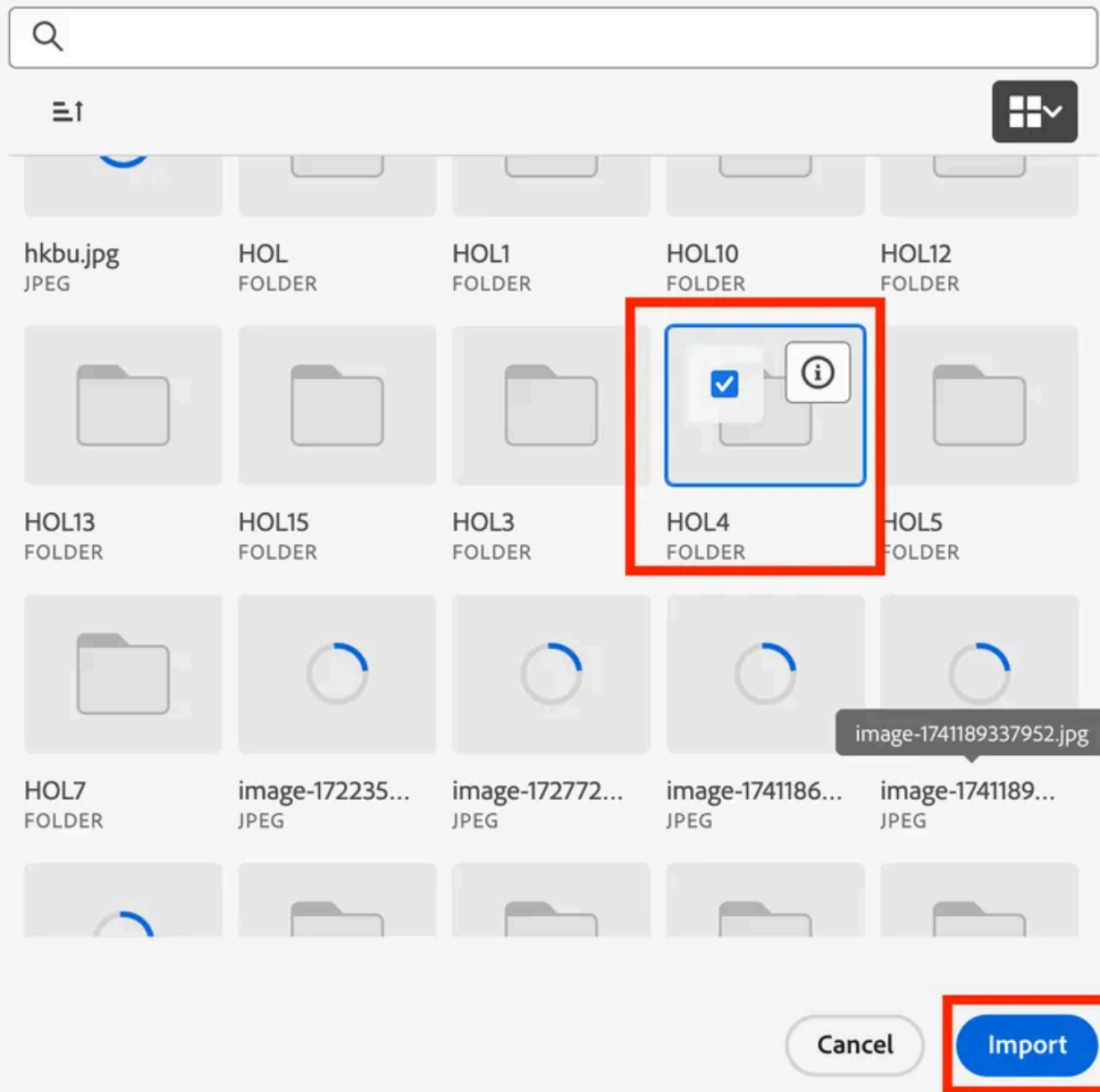
- You will then be instructed to save this Firefly generated image into your Asset Essentials folder. Click **Next**.



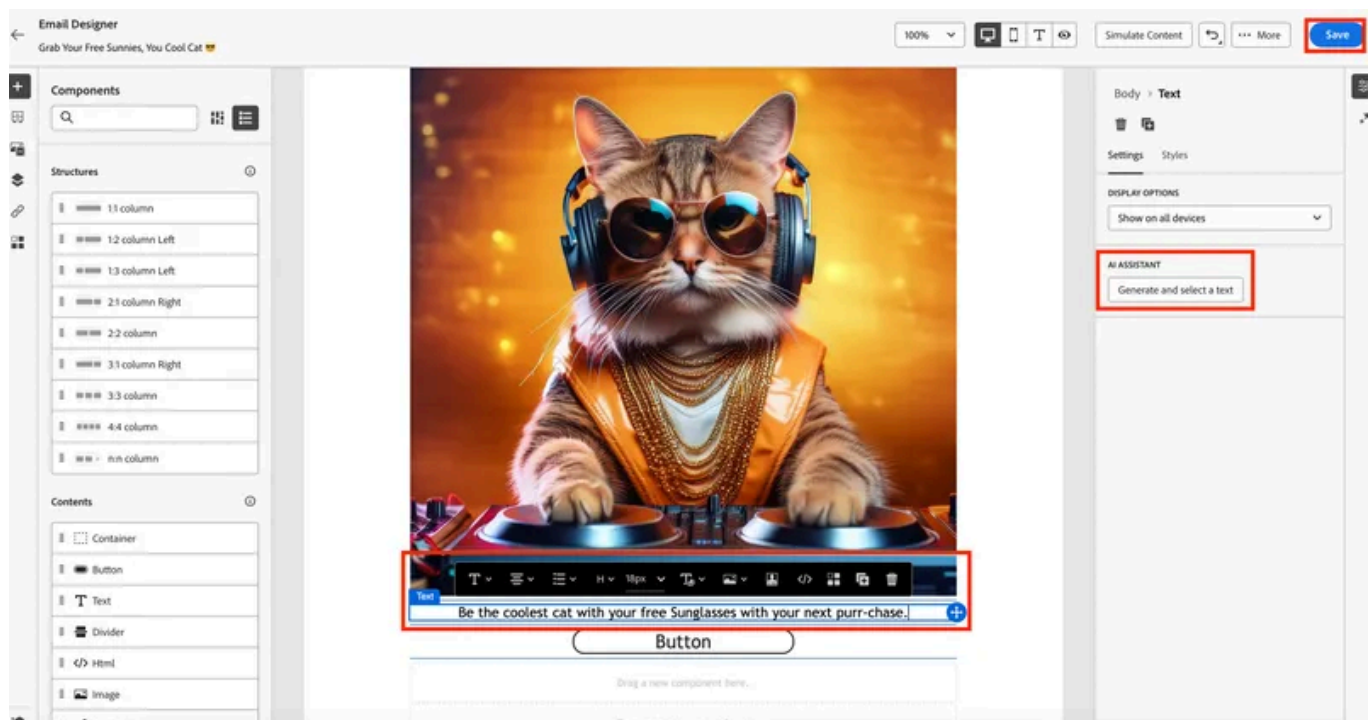
- Select the **HOL4 folder** then click **Import**.

Choose destination

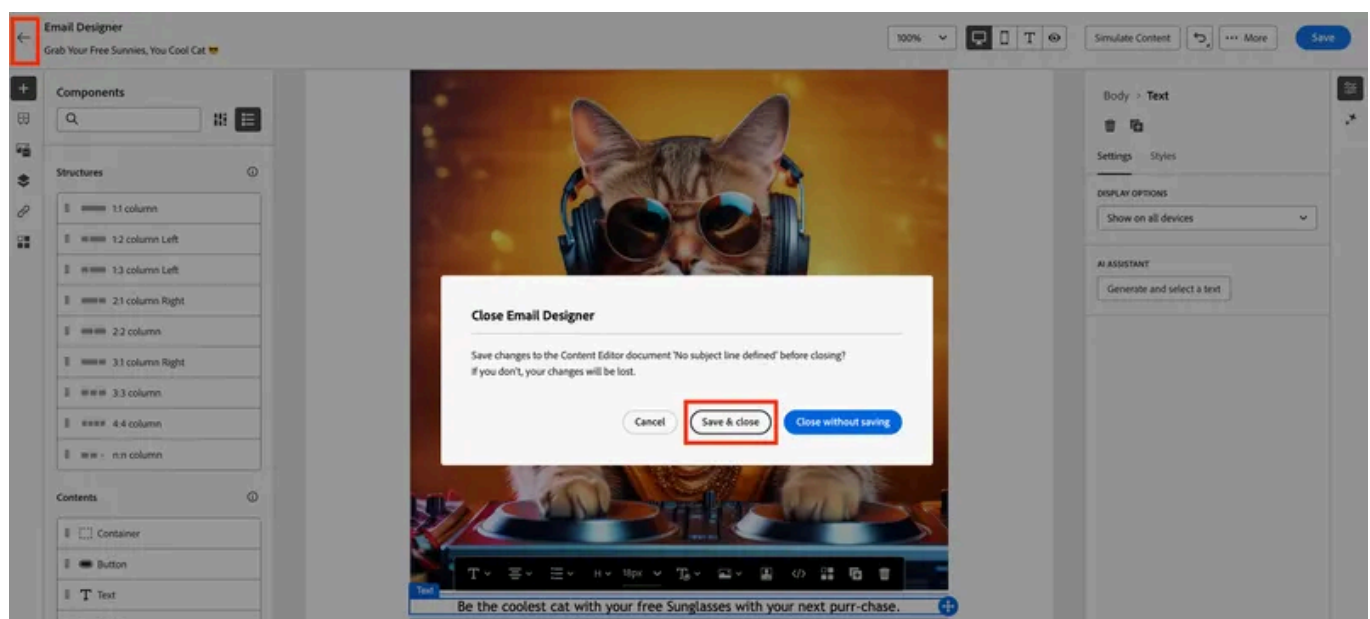
Folders



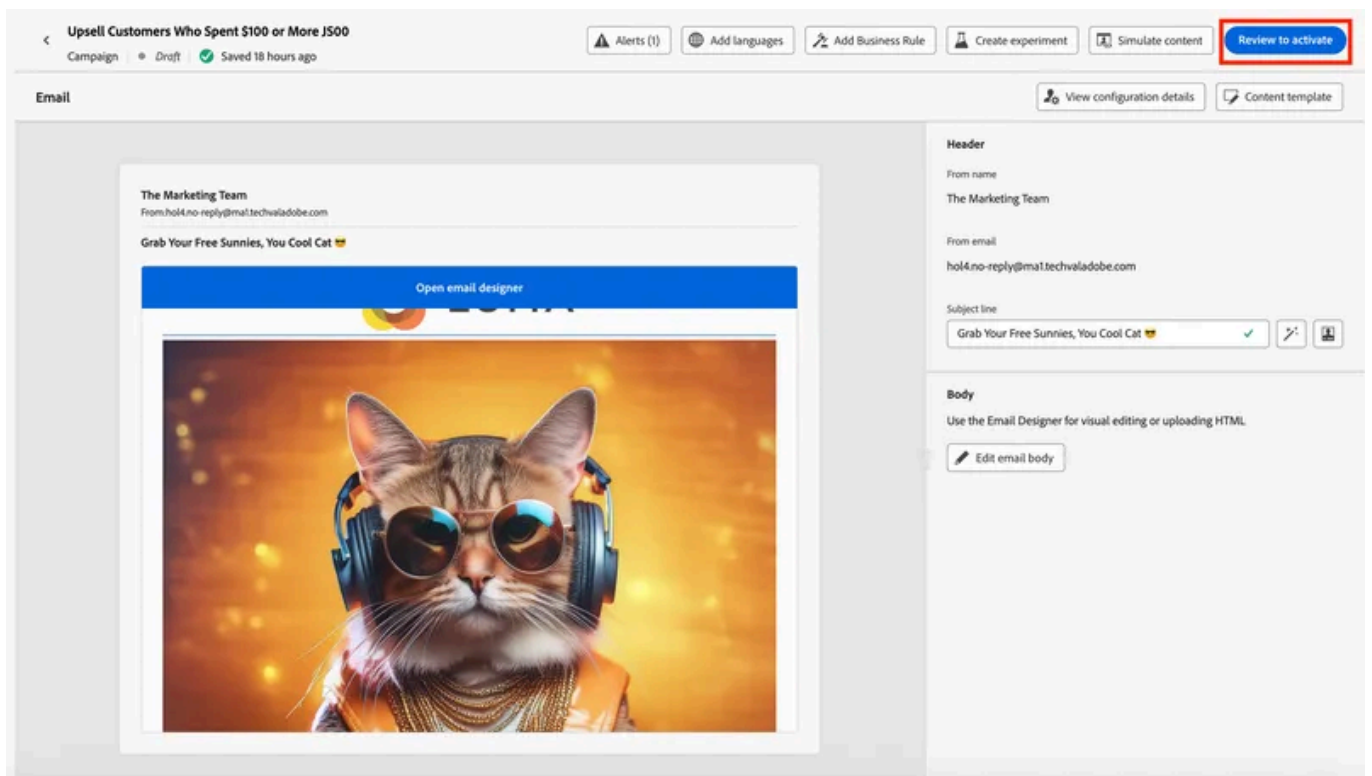
- The image will then be inserted into your email. Below the image is a text box where you can add any simple message you would like or use AI Assistant to create a short message for you. Have fun with this and try to make yourself laugh
 - Example: **Be the coolest cat with your free Sunglasses with your next purchase.**
 - Style the text any way you would like to.
- Then click **Save**.



- Click the **back button** then click **Save & close**.



- Then click Review & Activate.



- Congratulations you have created an email campaign using AI Assistant and GenAI with Firefly. There is no need to Activate the campaign. Hopefully you had fun and made yourself laugh with a funny campaign.