

Echostar B2B POC

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1. Environment Access

Accessing Adobe Experience platform for the Hands-on Lab

- Use Chrome or Firefox
- Sign-out of your Adobe Experience Cloud, or use a private browser window
- Do not use your own credentials to access the demo instance for this lab. Instead, you'll use the credentials provided here

Adobe Experience Platform URL <https://experience.adobe.com/>

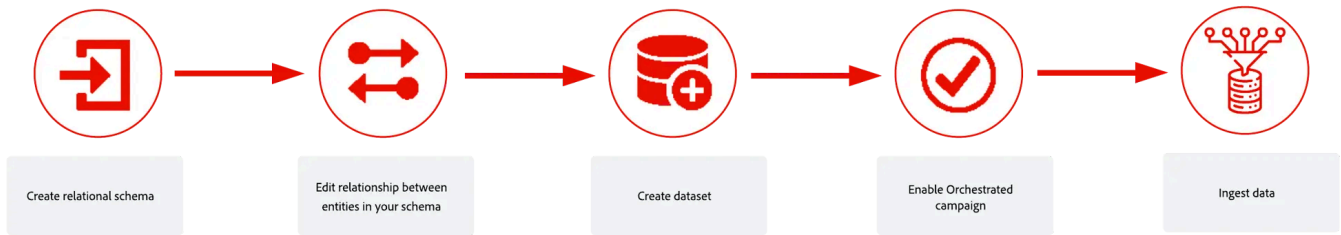
Assigned usernames below. The password is the same for all users

Password

ech0starPOC!

Lab Participant	AEP Username
Israel Romero	Echostaru01@ma1.aephandsonlabs.com
Abby Amundson	Echostaru02@ma1.aephandsonlabs.com
Hasan Ozturk	Echostaru03@ma1.aephandsonlabs.com
Todd Lido	Echostaru04@ma1.aephandsonlabs.com
Andre Lecomte	Echostaru05@ma1.aephandsonlabs.com
Sampath Gonnuru	Echostaru06@ma1.aephandsonlabs.com
Thomas Kauffman	Echostaru07@ma1.aephandsonlabs.com
Abby Amundson	Echostaru08@ma1.aephandsonlabs.com
Tara Kenney	Echostaru09@ma1.aephandsonlabs.com
Marc Paladino	Echostaru10@ma1.aephandsonlabs.com
Rahul Sarkhel	Echostaru11@ma1.aephandsonlabs.com
Julian Bishop	Echostaru12@ma1.aephandsonlabs.com
Ying Du	Echostaru13@ma1.aephandsonlabs.com
Andrew Soechtig	Echostaru14@ma1.aephandsonlabs.com
Xavier Rudnick	Echostaru15@ma1.aephandsonlabs.com
User 16	Echostaru16@ma1.aephandsonlabs.com
User 17	Echostaru17@ma1.aephandsonlabs.com
User 18	Echostaru18@ma1.aephandsonlabs.com
User 19	Echostaru19@ma1.aephandsonlabs.com
User 20	Echostaru20@ma1.aephandsonlabs.com
User 21	Echostaru21@ma1.aephandsonlabs.com
User 22	Echostaru22@ma1.aephandsonlabs.com
User 23	Echostaru23@ma1.aephandsonlabs.com
User 24	Echostaru24@ma1.aephandsonlabs.com
User 25	Echostaru25@ma1.aephandsonlabs.com

2. Relational-based Schema



Relational Schemas

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

It specifies:

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

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

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

Custom Objects

With Relational Schemas you are able to create Custom Objects that supports one-to-many (1:M) relationships. You can use these custom objects in segmentation and Query Service use cases. For example, you can model custom CRM objects, track product entitlements and purchases, and manage customer offers.

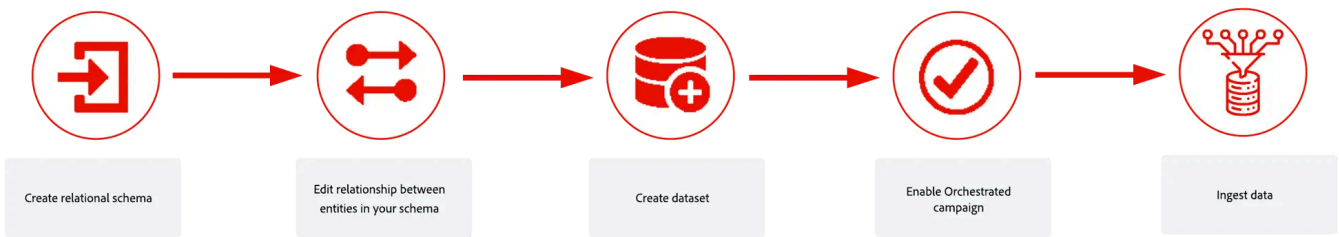


Sources That Support Relational Schemas

The following Sources are supported for use with Orchestrated campaigns:

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

2.1. Relational Based XDM



✓ **Excercise**

Upload Your DDL

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

Create a relational schema

Select an option to create a relational schema *



Create manually

Build schema by manually adding fields



Upload DDL file

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

[View all DDL import jobs](#)

Choose files



Entities and Fields to Import

We created a flat table with a Primary Key without related entities or identity namespaces, we will connect this data to a profile during our workflow. However, we must do a few things here:

The maximum file size for each file is 10 MB.

Add your initials to the name of each datasets so every participant has a different table of their own.

table_name	table_name_INITIALS
table_name	table_name_INITIALS

- Select the **version_control** as the version column.

Set the **Primary Key** for each schema.

Click Done.

Cancel

Next

Select entities and fields to import

2 tables, 16 columns selected Cancel Done

account_billing
8 of 8 columns selected

account_billing_a...
8 of 8 columns selected

Column selection						
Select columns that you want to import as fields into your schema						
Field label	Type	Identity	Field type	Version ID	Key	
id	String	B2B Account	☒ Required	☐ Versioning	☒ Primary key	1
account_number	String		☒ Required	☐ Versioning	☐ Primary key	
auto_pay_indica...	Boolean		☐ Required	☐ Versioning	☐ Primary key	
payment_dttm	DateTime		☐ Required	☐ Versioning	☐ Primary key	
payment_channel	String		☐ Required	☐ Versioning	☐ Primary key	
next_billing_date	Date		☐ Required	☐ Versioning	☐ Primary key	
payment_method	String		☐ Required	☐ Versioning	☐ Primary key	
version_control	DateTime		☒ Required	☒ Versioning	☐ Primary key	

Lab Material

Sample DDL

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

SQL

```
CREATE TABLE account_billing (
  id VARCHAR(20) PRIMARY KEY,
  account_number VARCHAR(20) NOT NULL, -- identifier, NOT a number
  auto_pay_indicator BOOLEAN,
  payment_dttm TIMESTAMP,
  payment_channel VARCHAR(32),
  next_billing_date DATE,
  payment_method VARCHAR(32),
  version_control TIMESTAMP
);

CREATE TABLE account_billing_address (
  id VARCHAR(20) PRIMARY KEY,
  account_number VARCHAR(20) PRIMARY KEY, -- identifier, NOT a number
  billing_address_line_1 VARCHAR(255),
  billing_address_line_2 VARCHAR(255),
  billing_city_name VARCHAR(128),
  billing_postal_code VARCHAR(10),
  billing_state_code VARCHAR(2),
  version_control TIMESTAMP
);
```

 echostar-accounts.ddl	
---	---

2.2. Data Ingestion



Exercise

Configure a Data Flow

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

Lab Material

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

 [Boost-Account-Subscriber-information - ...](#)



 [Boost-Account-Subscriber-information - ...](#)



3. Real-Time Customer Data Platform Profile

Profile Overview

Adobe Experience Platform enables you to 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.

Account profiles enable you to unify account information from multiple sources. This unified view of an account brings together data from across your many marketing channels and the diverse systems that your organization is currently using to store customer account information.

Exercise

In this section, we will perform a series of steps to do the following:

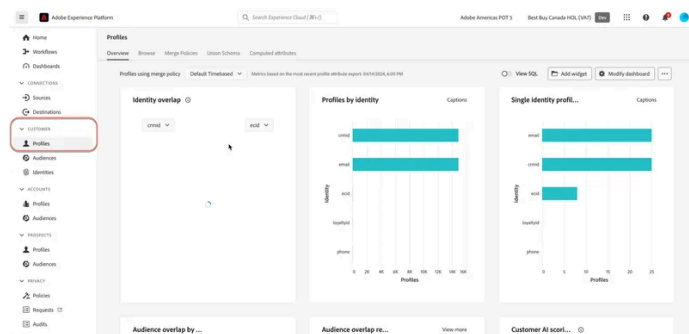
1. Explore an existing profile
2. Explore an existing account profile

Objective: In this exercise, we will look up customer profiles to view profile attributes identities. We will also look at the account profile that is associated with the customer profile.

Instructions:

View Customer Profile:

- Open AEP UI and navigate to **Customer > Profiles** page



- Open the Browse tab. Search and select the **B2B Person** namespace. Enter **fbdd55d0-b078-4a31-8097-e12706958fb0** to view the profile

Profiles

+ Add dataset to Profile

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 ⓘ

View

Clear

Default Timebased

X

B2B Person

✓

X

fbdd55d0-b078-4a31-8...

✓

88

≡

--

ProfileId: G3m-TwFCb_vdVdCweEoxgJfhJwaVj7A

View

- Click on Accounts

View Account Profile:

- Open AEP UI and navigate to **Account > Profiles** page
- Open the Browse tab.
 - Search and select the following:
 - Browse By: **Others**
 - Source Name: **SourceX**
 - Source Instance: **SourceX1234**
 - Account ID: **810853353**

Account Profiles > G42-TwFa6s8FdIPpo1QwzvqLq3HI9dt-P0qLq3Hlw

Details Attributes People Opportunities Related accounts

Q Search

View JSON

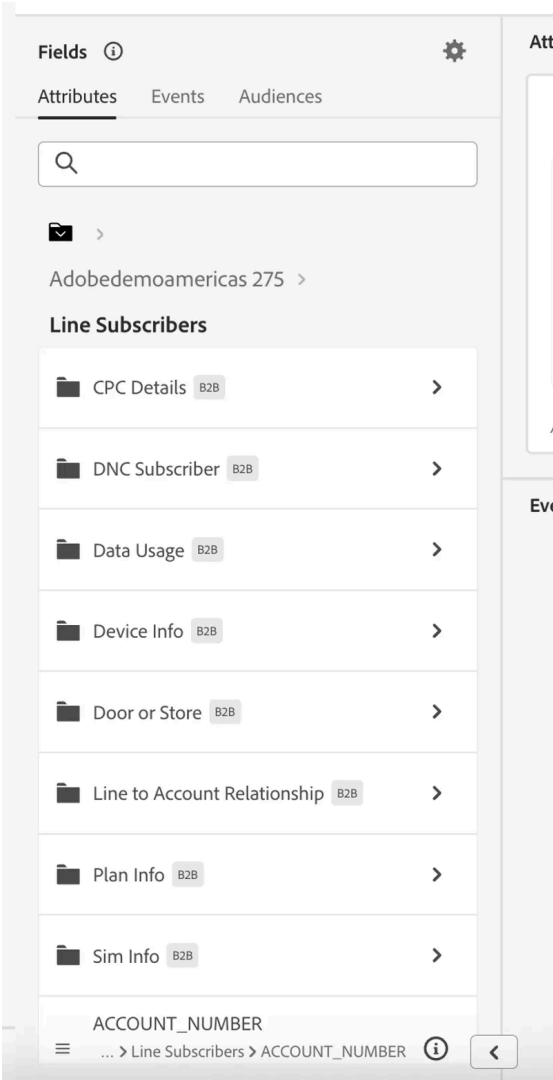
Attribute ↑	Display name	Value	Path
ACCOUNT_CREATION_DATE	ACCOUNT_CREATION_DATE	0012-04-22	_adobedemoamericas275.accounts.ACCOUNT_CREATION_DATE
ACCOUNT_DISCONNECT_DATE	ACCOUNT_DISCONNECT_DATE	0026-07-23	_adobedemoamericas275.accounts.ACCOUNT_DISCONNECT_DATE
ACCOUNT_EMAIL_ADDRESS	ACCOUNT_EMAIL_ADDRESS	user132@mockmail.com	_adobedemoamericas275.accounts.ACCOUNT_EMAIL_ADDRESS
ACCOUNT_NUMBER	ACCOUNT_NUMBER	810853353	_adobedemoamericas275.accounts.ACCOUNT_NUMBER
BRAND_NAME	BRAND_NAME	boost mobile	_adobedemoamericas275.accounts.BRAND_NAME
CASH_BALANCE	CASH_BALANCE	56.89	_adobedemoamericas275.accounts.CASH_BALANCE
CREDIT_BALANCE	CREDIT_BALANCE	91.83	_adobedemoamericas275.accounts.CREDIT_BALANCE
CUSTOMER_ACCOUNT_FIRST_NAME	CUSTOMER_ACCOUNT_FIRST_NAME	chris	_adobedemoamericas275.accounts.CUSTOMER_ACCOUNT_FIRST_NAME
CUSTOMER_ACCOUNT_LAST_NAME	CUSTOMER_ACCOUNT_LAST_NAME	williams	_adobedemoamericas275.accounts.CUSTOMER_ACCOUNT_LAST_NAME
id	id	810853353	identityMap.b2b_account.0.id

4. Building Audiences

Once the B2B entity relationships are established and data imported, you can now begin to build line level audiences with B2B entities.

The audience builder canvas enables you to traverse through B2B custom objects linking person to account entities

The folder tree reflects the B2B union schema and displays all custom objects enabled



Use the Customer audience profile attributes to qualify the following audience

Line Subscribers Eligible for Boost Upgrade

Two fields are needed which exist across person and account tables

UPGRADE_ELIGIBLE_CATEGORY = Eligible

and

BRAND_NAME = Boost

Attributes

Include

▼

 all

▼

 of:

...

≡

UPGRADE_ELIGIBLE_CATEGORY

i

×

Populated

100%

equals

▼

Select or enter values

▼

+

eligible

×

Case sensitive

And

Include

▼

Person Components¹

 where:

...

≡

BRAND_NAME

B2B

i

×

Populated

100%

equals

▼

Select or enter values

▼

+

boost mobile

×

Case sensitive

Add attribute or audience

The audience is line-level and uses the many:1 cardinality to identify and filter the brand for the eligible line.

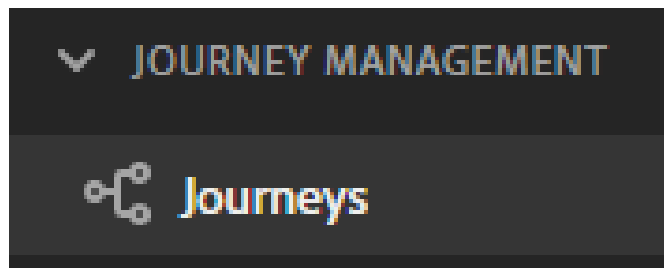
5. Creating a Journey

We are going to create a Journey for customers who are eligible for an upgrade for a new phone. The primary account holder will receive an email while all other line subscriber will receive a SMS message.

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

Create a Journey

- Navigate to Journeys



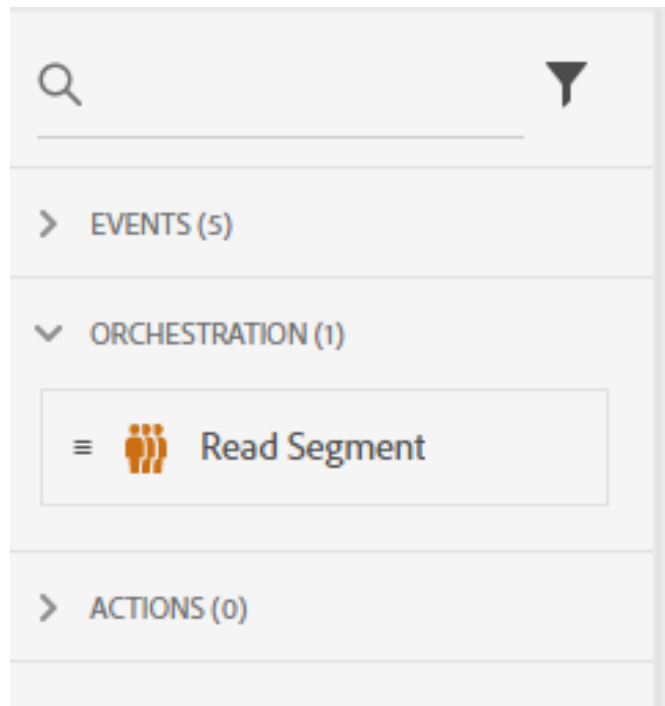
- Click on "Create Journey"



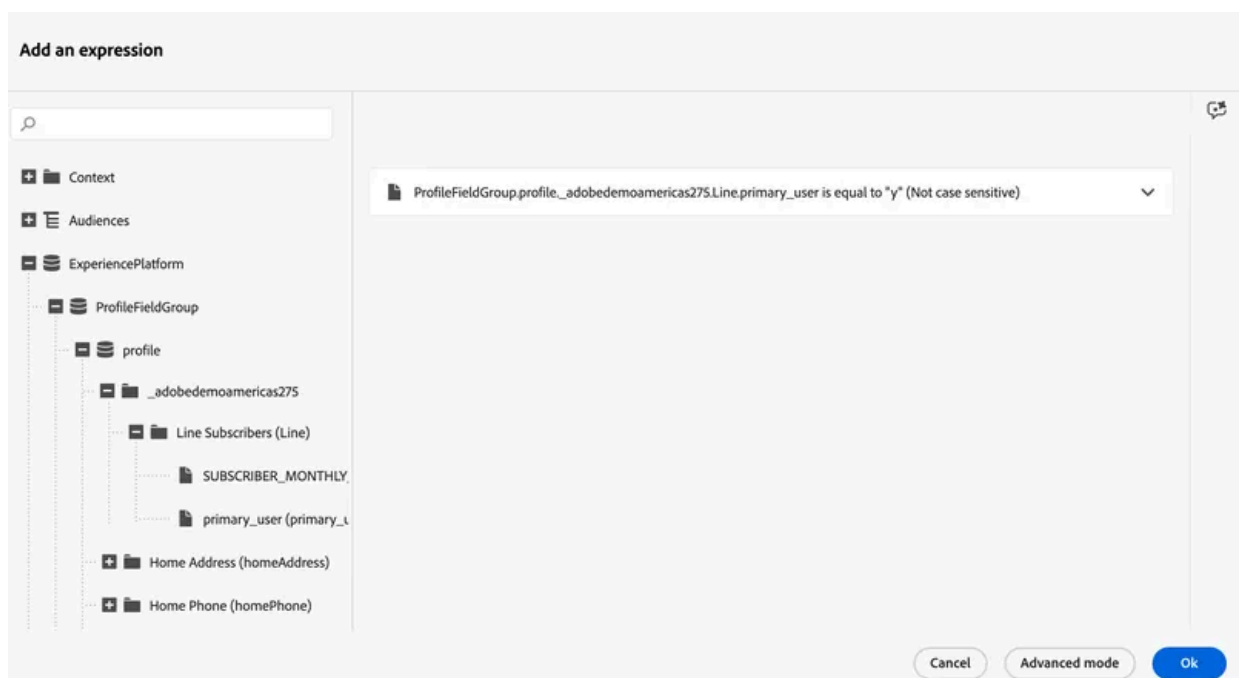
- Provide a Name and Description: "**Upgrade Phone Journey + Your Initials**"

Define the Audience

1. Under Orchestration Node, drag the "Read Segment" onto the Canvas.

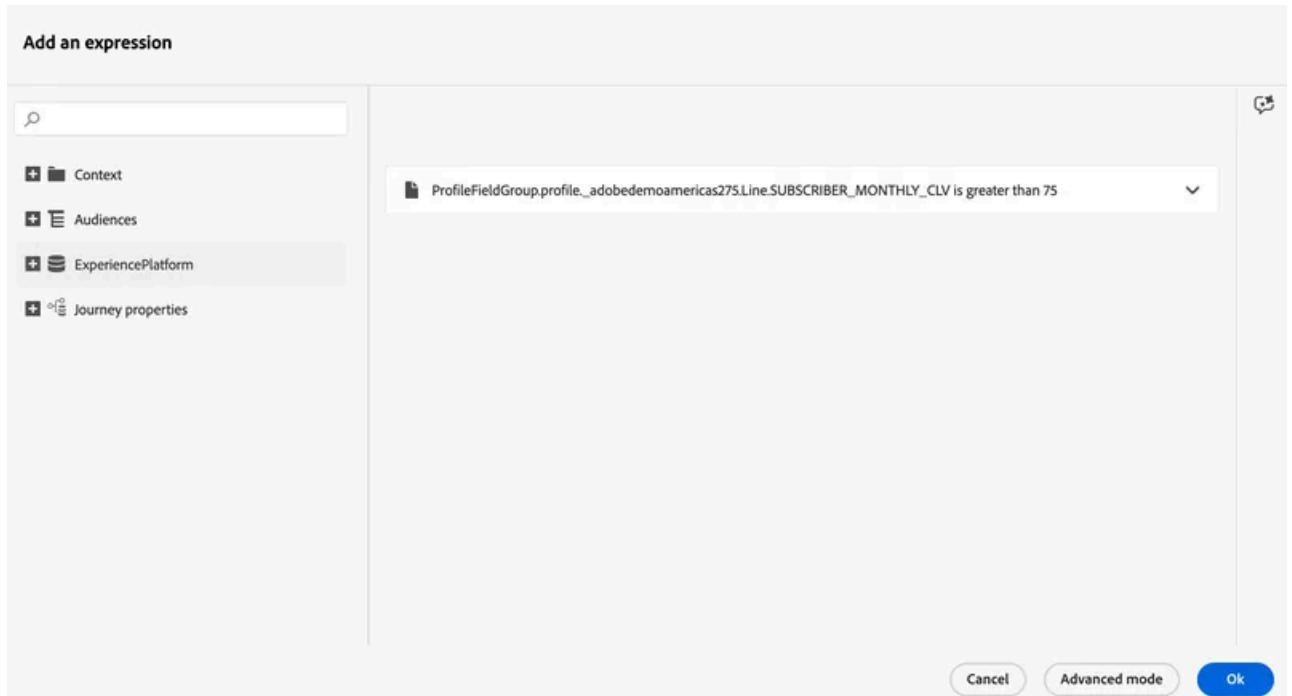


- Select “**Line Subscribers Eligible for Boost Upgrade**”.
- Under namespace select **B2B Person**
- Click Save.
- Add Optimization
 - Path 1: **Account Holder Email**
 - Select Primary_user where it equals 'Y'

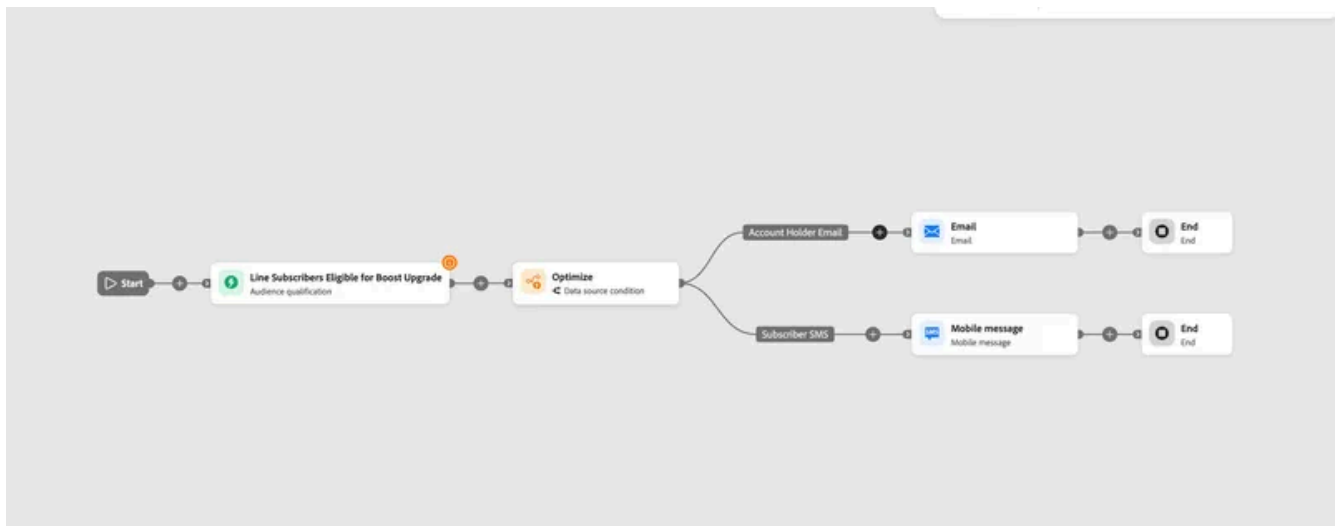


- Add **Action** and select **Email**

- Select a Template and update for the use case
- Path 2: **Subscriber SMS**
 - Select SUBSCRIBER_MONTHLY_CLV is Greater Than 75.



- Add **Action** and select **SMS**
- Select a Template and update for the use case



6. Key Takeaways

Presentation

 [Echostar_POC.pdf](#)



Recording

