

Adobe Summit

LAB WORKBOOK

L535 – Scaling orchestration to omnichannel engagement in Adobe Journey Optimizer

Adobe Summit 2025

Table of Contents

<i>Lab Overview</i>	2
The Story	2
Prerequisites	3
<i>Lesson 1 – Experience the Journey</i>	4
Exercise 1.1 – Create a checking account	4
Exercise 1.2 – Sign in to your account	7
Exercise 1.3 - Install the app	9
Exercise 1.4 Check the results of your journey	13
<i>Lesson 2 – Create a Welcome Journey</i>	14
Exercise 2.1 – Login to Journey Optimizer	14
Exercise 2.2 – Start building the journey	15
Exercise 2.3 – Compose the email message.....	18
Bonus Exercise:.....	26
<i>Lesson 3 Dynamic Content</i>	27
Exercise 3.1 – Apply dynamic content to the SMS message.....	27
<i>Lesson 4 – Content Experimentation</i>	33
Exercise 4.1 – Create a content experiment	33
Exercise 4.2 – Configure the treatments	35
Bonus Exercise.....	37
<i>Lesson 5 – Test your Journey</i>	38
Exercise 5.1 – Test your welcome journey	38
<i>Lesson 6 – Content Cards</i>	42
Exercise 6.1 – Set up content card in a campaign	42
<i>Additional Resources</i>	47
<i>Thank You!</i>	47

Lab Overview

In this lab, you'll learn how to transform business communications from basic outbound messaging to sophisticated omnichannel experiences. Through practical examples, you'll create a customer journey that combines proactive outreach with responsive engagement.

The Story

SecurFinancial is a fictional bank offering a wide range of financial products and services, including checking accounts, loans, and credit cards.

Objective:

SecurFinancial aims to significantly increase the number of customers using its mobile app to enhance customer satisfaction and retention. By expanding mobile app usage, the bank hopes to reduce operational costs, streamline processes, and provide personalized services using data insights. This strategy will differentiate SecurFinancial from competitors, attract new customers, and reach underbanked populations, driving growth and improving market position. Ultimately, increasing mobile app adoption will reinforce SecurFinancial's commitment to innovation and superior customer experience.

Your Role:

You have been hired by SecurFinancial to help boost mobile app usage. You have been asked to implement a new onboarding experience with Adobe Journey Optimizer for new customers who have just opened a checking account.

The journey includes a series of personalized communications, starting with a warm welcome email or SMS, depending on the customer's communication preferences, as well as a notification on the website that introduces the customer to the mobile app with a call to action to download and install the app. Once the app has been installed the customer will receive a push notification incentivizing them to use the app.

Your challenges:

- SecurFinancial has provided you with brand guidelines, but the email marketing specialists are currently not available, so you will need to compose a compelling email message.
- You need to make sure that only customers who have not already installed the app are asked to install it. Anyone who already has the app installed should only receive a general welcome message.
- You have several approaches for the push message in mind but are not sure which one will be most efficient. You want to make sure the most effective message is sent.
- You would like to continue the onboarding experience in the mobile app as well, without being intrusive.

Prerequisites

- Know your seat number: You can find your seat number on the lab machine's desktop
- You require access to:
 - [Adobe Journey Optimizer](#)
 - [SecurFinancial Website](#)
 - [Summit Lab 535 Cheat Sheet](#), which has all the text and links to copy and paste.

Lesson 1 – Experience the Journey

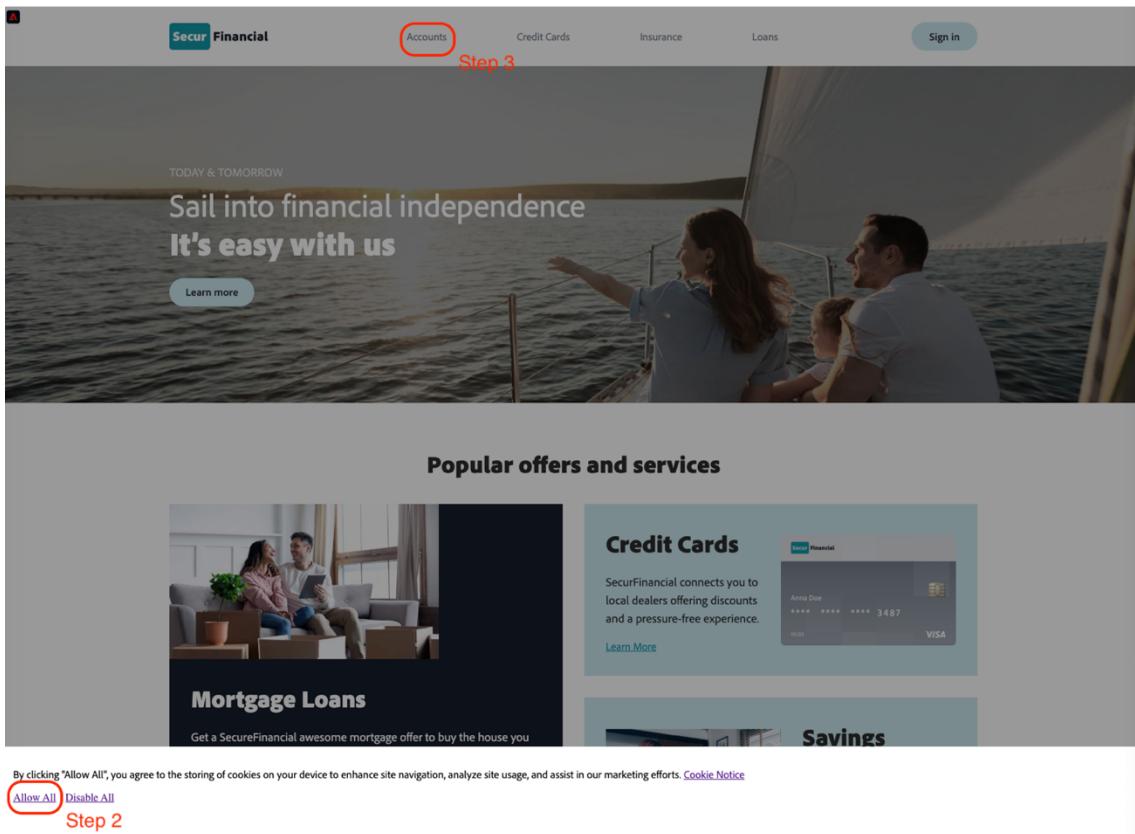
Lesson Overview: In this lesson you experience the onboarding journey of a new SecurFinancial customer.

Exercise 1.1 – Create a checking account

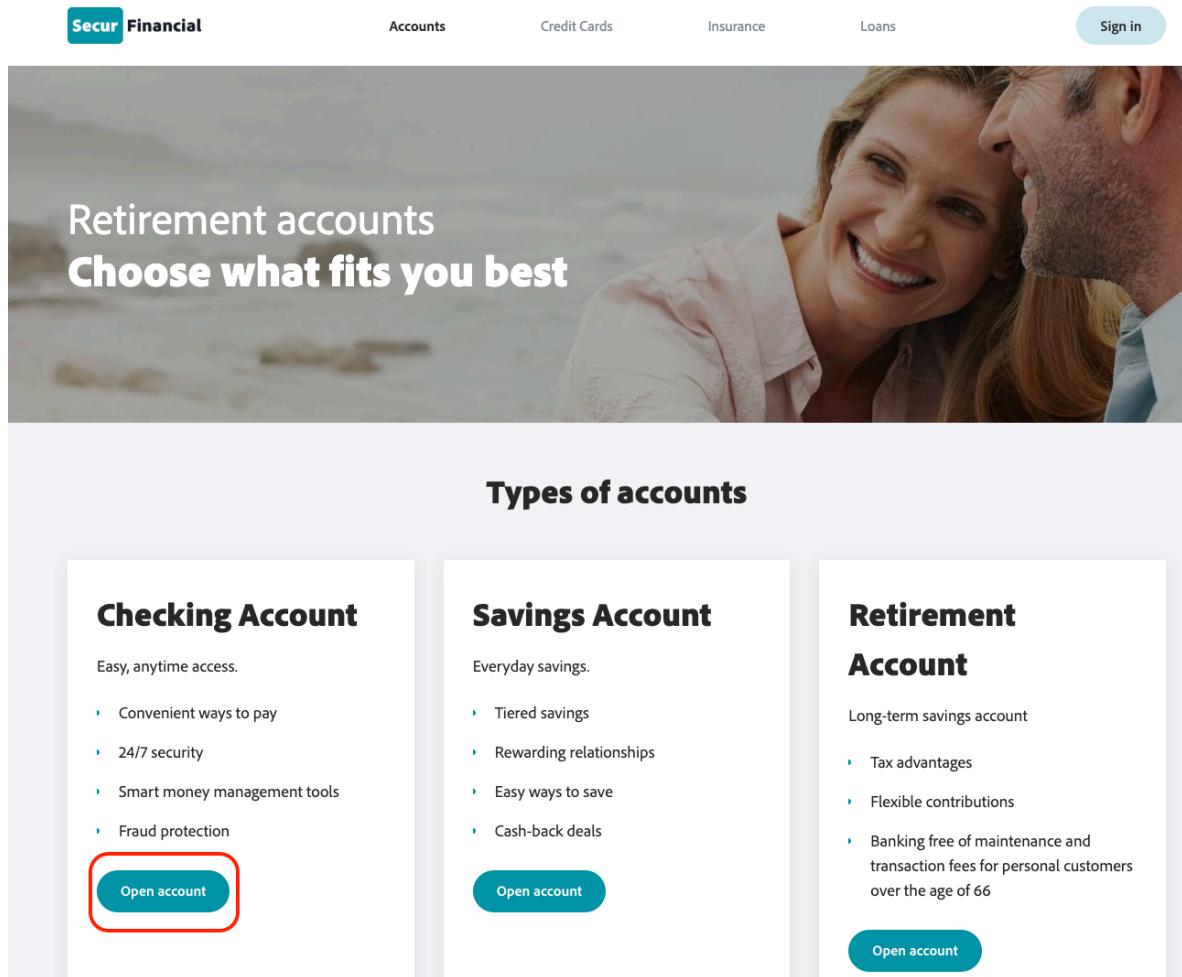
Step 1: Navigate to the [SecurFinancial website](#)

Step 2: Select to Allow All cookies in the pop up at the bottom of the home screen

Step 3: Click on **Accounts** in the top navigation.



Step 4: On the Accounts page, in the **Checking Account** section, click on the **Open account** button.



The screenshot shows the Secur Financial website's homepage. At the top, there's a navigation bar with links for 'Accounts', 'Credit Cards', 'Insurance', 'Loans', and a 'Sign in' button. Below the navigation is a large banner with a photo of a smiling couple at a beach. The banner text reads 'Retirement accounts' and 'Choose what fits you best'. Underneath the banner, the page title 'Types of accounts' is centered. Three cards are displayed side-by-side: 'Checking Account', 'Savings Account', and 'Retirement Account'. Each card lists benefits and features, followed by a blue 'Open account' button. The 'Checking Account' button is specifically circled with a red box.

Checking Account

Easy, anytime access.

- Convenient ways to pay
- 24/7 security
- Smart money management tools
- Fraud protection

[Open account](#)

Savings Account

Everyday savings.

- Tiered savings
- Rewarding relationships
- Easy ways to save
- Cash-back deals

[Open account](#)

Retirement Account

Long-term savings account

- Tax advantages
- Flexible contributions
- Banking free of maintenance and transaction fees for personal customers over the age of 66

[Open account](#)

Step 5: On the new-account-step-1 page, populate the form - these fields are required for the lab!

1. Add First Name and Last Name
2. Add your **Email address** – Make sure to choose an email address that you can access during the lab!
3. Add your **Phone** number – Make sure to add the country code in front of your number. For example for the US and Canada +1234567890!
4. Add your **seat number**. You can find your seat number on the lab machine's desktop.

5. Select your communication preference.

Double check that you have entered an email address or phone number that you have access to from your phone.

6. Click on **Next**

The screenshot shows a web form for account creation. At the top, there is a logo for "Secur Financial" and navigation links for "Accounts", "Credit Cards", "Insurance", and "Loans". A "Sign in" button is also visible. The main form area contains fields for personal information:

- First Name ***: Jane
- Last Name ***: Doe
- Email Address ***: jane.doe@email.com
- Phone Number (include the country code!) ***: +1669123456
- Seat Number ***: 999
- Communication Preference ***:
 Email SMS

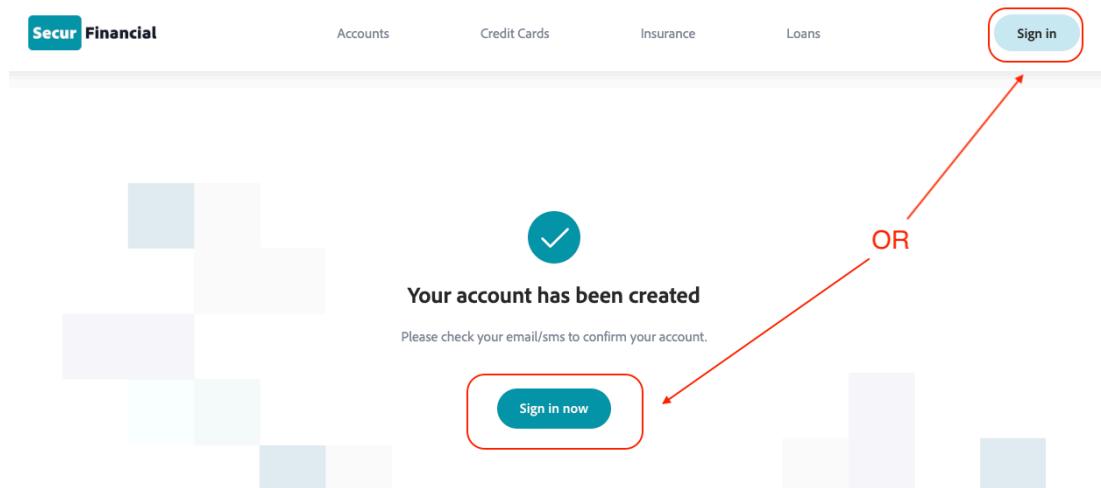
At the bottom of the form are two buttons: a teal "Cancel" button on the left and a teal "Next" button on the right.

Step 6: Enter data on the new-account-step-2 page:

1. The address details are optional.
2. Select your **communication preference**: Email or SMS
3. Click on **Submit**

Exercise 1.2 – Sign in to your account

Step 1: Click the **Sign in now** or the **Sign in** button on the new-account-form-submitted page.



Step 2: On the sign-in screen, enter the email address you created the account with.

The screenshot shows a 'Sign in to your account' form. At the top, there is a 'Secur Financial' logo. Below it, the title 'Sign in to your account' is centered. There are two input fields: an 'Email' field and a 'Password' field, both enclosed in a red-outlined box. Below the 'Email' field, there is a placeholder 'Email'. Below the 'Password' field, there is a placeholder 'Password'. At the bottom of the form, there is a red-outlined 'Sign In' button on the left and a blue 'Create an account' link on the right.

Result: You should see a personalized web in-app message appear on your dashboard:

The screenshot shows the Secure Financial mobile application's dashboard. At the top, there is a navigation bar with tabs for "Dashboard", "Accounts", "Credit Cards", "Insurance", and "Loans". A user profile icon for "Jane" is also present. A prominent in-app message overlay is displayed, featuring a large image of a hand holding a smartphone with the Secure Financial app open, showing a balance of \$12,920.00. The overlay includes text encouraging users to manage their money with the mobile app and a blue button labeled "Download the app now". Below the overlay, the main dashboard displays the primary account information ("Checking (16 1020 1026 0000 1402 046") and a balance of "\$12,920.00". It also shows a section for "Latest transactions" with five recent entries, a chart showing monthly transaction volume from January to December, and a sidebar with links for "Lock card", "Turn off the card", and "Card settings".

Date	Category	Type	Amount
07/26/2021	Farmer's Shop	Grocery	- \$345
07/25/2021	Mobile Bill	Finance	- \$95
07/13/2021	Internet Bill	Finance	- \$220.40
07/12/2021	Cinema	Entertainment	- \$20
07/26/2021	Farmer's Shop	Grocery	- \$23

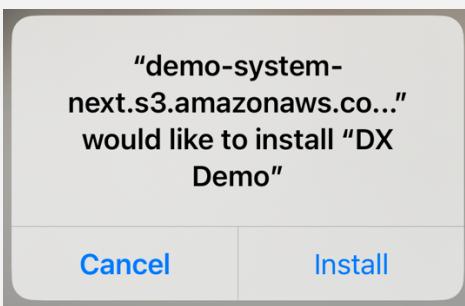
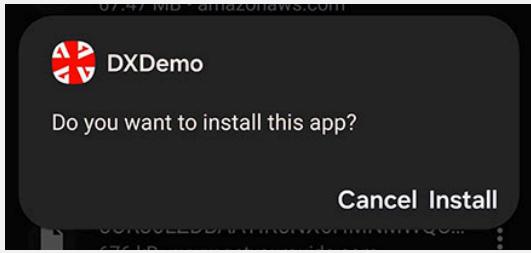
This screenshot shows a different view of the Secure Financial mobile application's dashboard. It features a bar chart at the top right showing monthly transaction volume from January to December. Below the chart, there is a navigation bar with tabs for "Dashboard", "Accounts", "Credit Cards", "Insurance", and "Loans". A user profile icon for "Jane" is also present. The main content area displays the primary account information ("Checking (16 1020 1026 0000 1402 046") and a balance of "\$12,920.00". It also shows a section for "Latest transactions" with five recent entries.

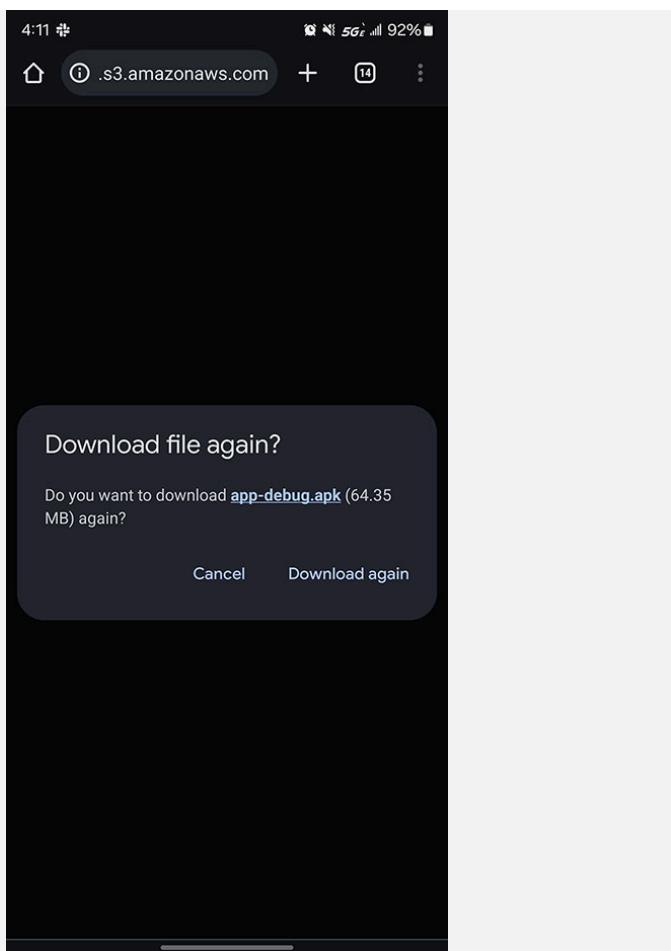
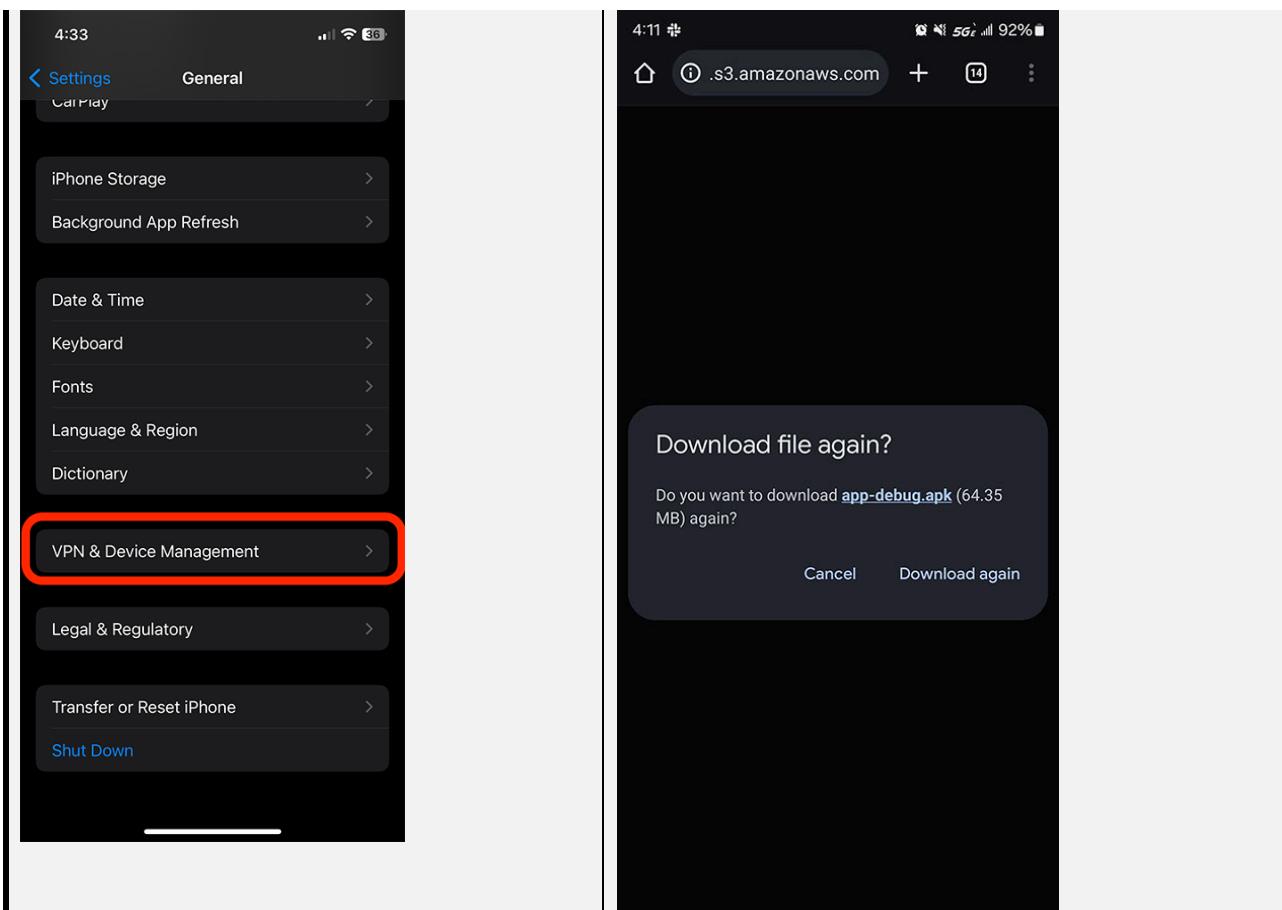
Exercise 1.3 - Install the app

Step 1: Click on the [Download the app now](#) button - if you don't see the in-app message, then click the link here in the workbook.

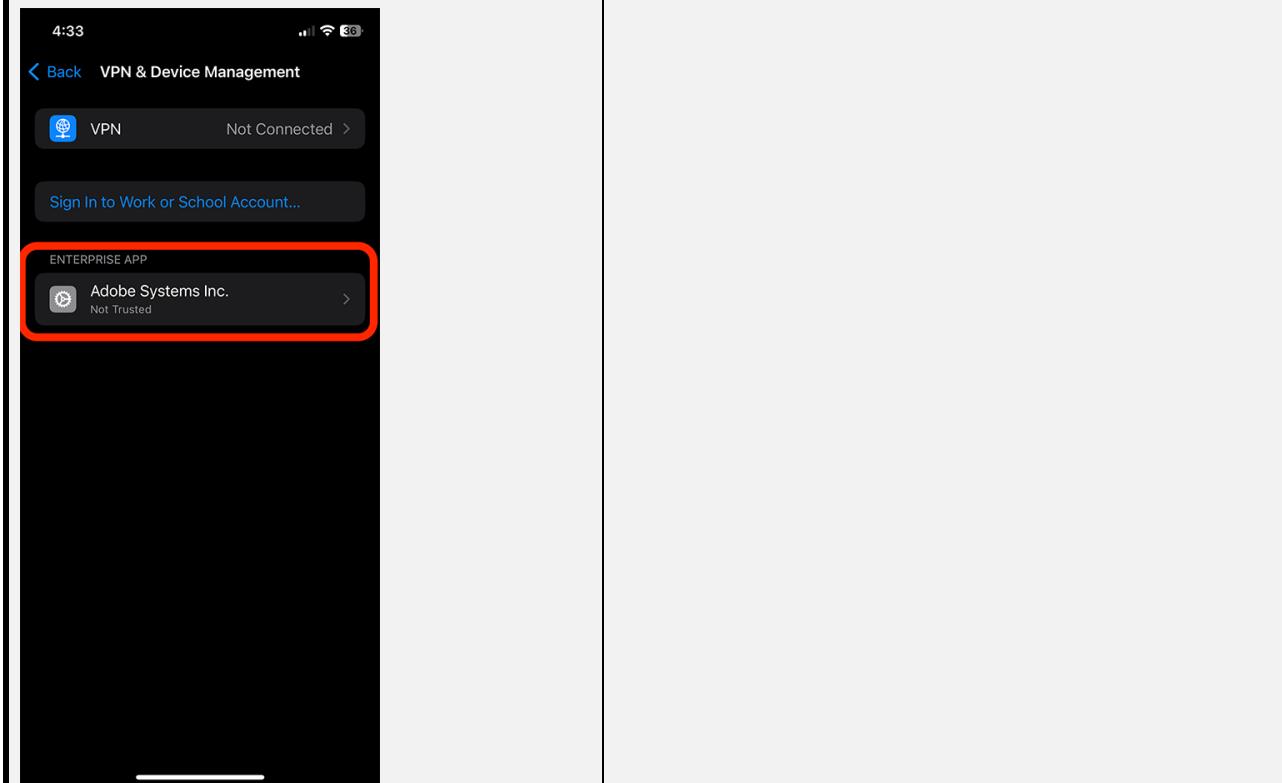
Step 2: Scan the QR code to install the app.

Step 3: Follow the instructions below to install the app

iOS	Android
<p>1. Click on Install</p>  <p>2. Trust Adobe enterprise developer</p> <p>After installing the app, you must trust the Adobe enterprise developer:</p> <p>Go to Settings > General > VPN & Device Management.</p>	<p>1. Download and install the APP by following the alert instructions shown here:</p> 

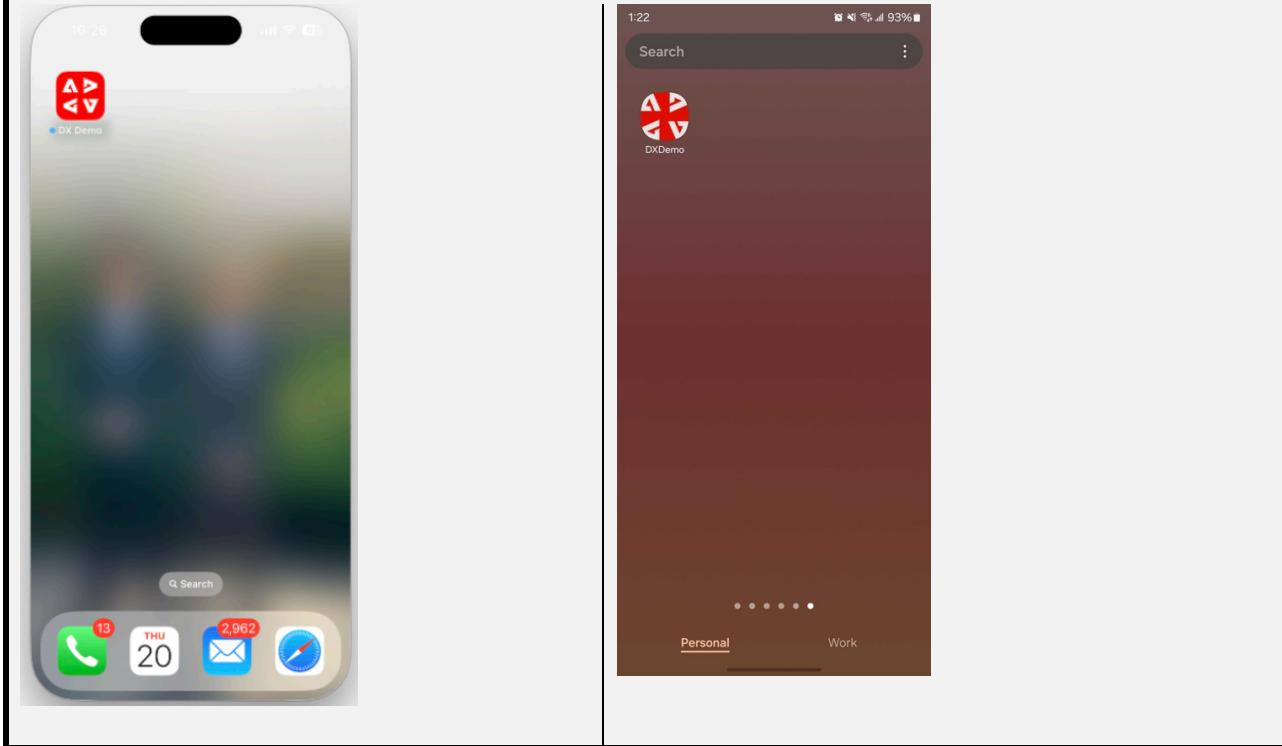


Select **Adobe Systems Inc** and **Trust Adobe Systems Inc.**

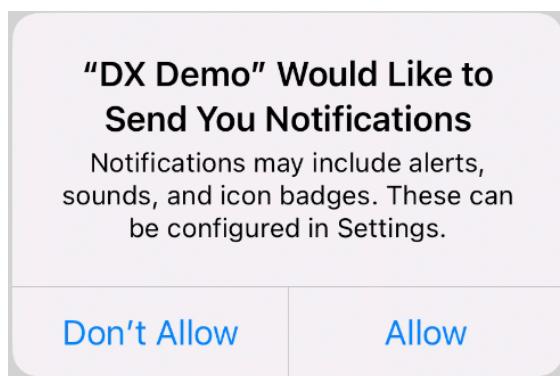


You need to restart your phone.

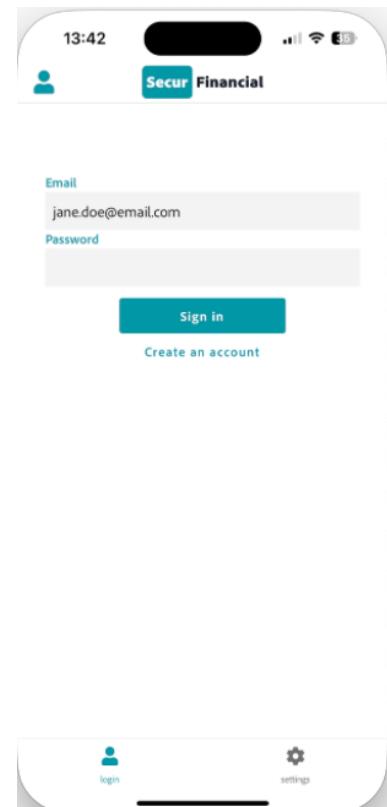
Result: You should now be able to launch the **SecurFinancial** app on your Phone



Step 4: Open the app and on the pop up, select **Allow**.



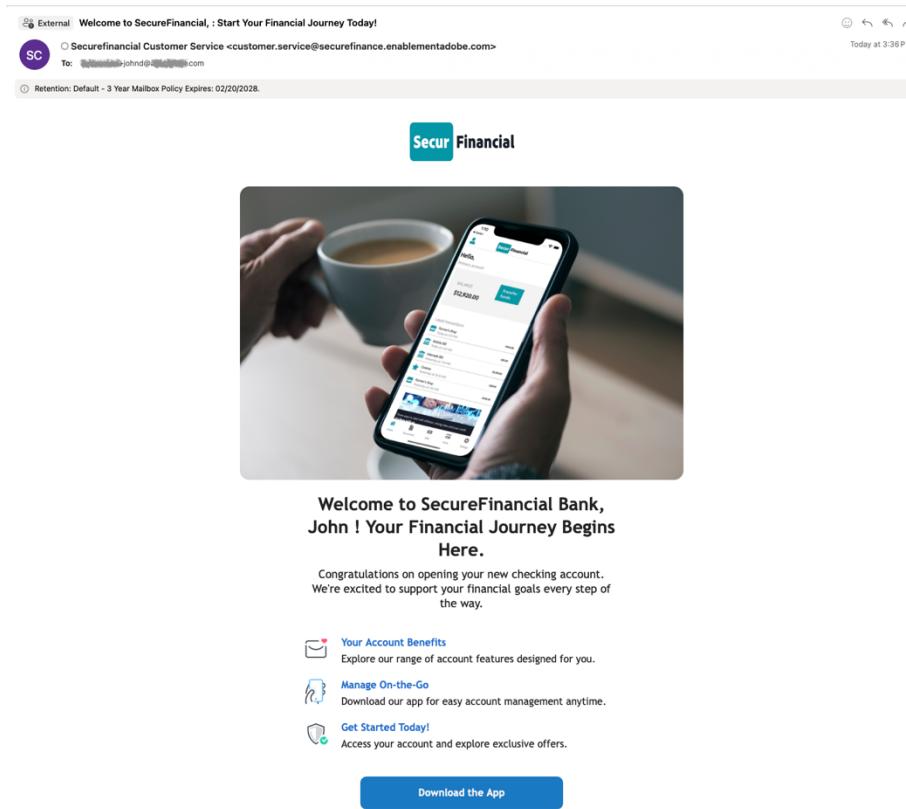
Step 5: Log in to the app using the email address you created the checking account with. You do not need to enter a password.



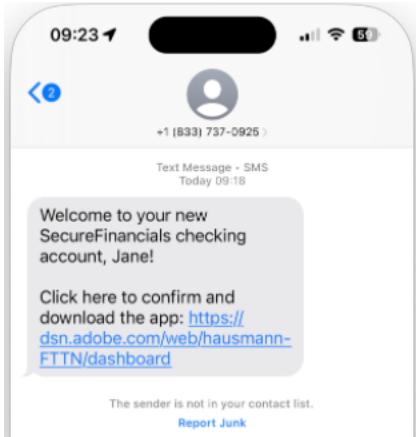
Exercise 1.4 Check the results of your journey

The web in app notification you saw when you logged into the dashboard is only one touchpoint the SercurFinancial brand had with you. Depending on the communication preferences you selected on the account creation form, you either received

....an email - check your spam folder if you don't have the email in your inbox.



...or a SMS



You will also receive a push notification as part of the welcome journey.

Lesson 2 – Create a Welcome Journey

Lesson Overview: In this exercise you start building the welcome journey, based on an existing journey. You start by defining the entry criteria and then build compose the email message first, using the AI Content Accelerator.

Exercise 2.1 – Login to Journey Optimizer

If you are already logged in on your machine lab machine continue to [Exercise 2.2](#).

Step 1: Open [Adobe Journey Optimizer](#)

Step 2: Log in using the following details:

Email Address: L535+*your seat number*@adobeeventlab.com

Password: Adobe4Summit!

You can find the details for your login on your lab machine desktop. Use the **Adobe ID** and the **Password**.

Step 3: You are asked to add a mobile number, select **Not now**.

Result: After logging in, you are on the Journey Optimizer homepage.

Exercise 2.2 – Start building the journey

- Step 1:** In the left navigation, under **Journey Management**, click on **Journeys**. In the search bar, type in your seat number with three digits (for example “001” for seat number 1, “023” for seat number 23) and hit return.
- Step 2:** From the search results, select the journey that is called “*your_seat_number-Welcome Journey*” to open the journey canvas.

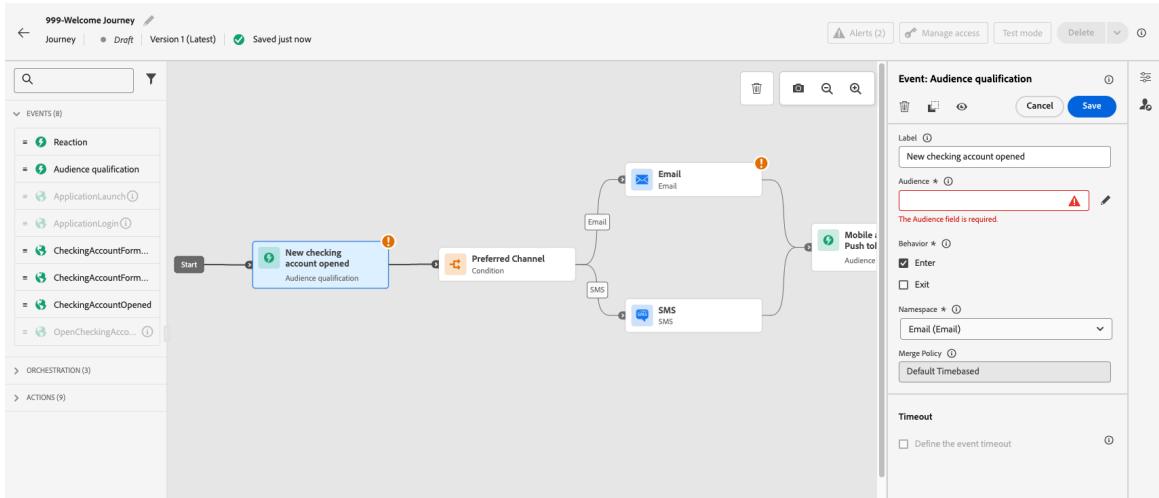
The screenshot shows the Adobe Journey Optimizer interface. On the left, there is a navigation sidebar with the following items: Home, Journey management (expanded), Campaigns, **Journeys** (highlighted with a red circle), Reports, Decision Management (expanded), Offers, and Components. The main area is titled "Journeys" and shows a search bar with "999" and a result count of "1 of 1". Below the search bar, there are filtering options: "Version: Latest" and "Clear all". A table lists the journey: "Name" is "999-Welcome Journey", "Status" is "Draft".

Result: You should see the journey canvas with the journey template:



Step 3: Configure the event that triggers the journey. In our case we will use an audience qualification event.

1. In the journey click on the **New checking account opened** audience qualification event on the canvas, to open the details on the right of the canvas.
2. You will see that the Audience field is marked red. Click on the pencils next to the field.



3. On the audience selection screen, in the search bar, type in *SecurFinancial* and then select **SecurFinancial Checking account Opened**

Name	Profile Count	Update Time	Creation Time
<input checked="" type="checkbox"/> SecurFinancial Checking Account Opened	75	3/3/2025, 8:34 AM	2/13/2025, 4:07 PM
<input type="checkbox"/> SecurFinancial - Not Using Mobile App	0	2/25/2025, 11:23 AM	2/25/2025, 10:39 AM
<input type="checkbox"/> SecurFinancial - Not Mobile App Users	117	2/25/2025, 10:51 AM	2/25/2025, 9:28 AM
<input type="checkbox"/> SecurFinancial - Mobile App User	31	2/25/2025, 9:02 AM	2/25/2025, 9:02 AM
<input type="checkbox"/> SecurFinancial - Interested in consolidating finances	0	2/12/2025, 3:18 PM	2/12/2025, 3:18 PM
<input type="checkbox"/> SecurFinancial - Interested in loans	0	2/12/2025, 3:18 PM	2/12/2025, 3:18 PM
<input type="checkbox"/> SecurFinancial - Looking for a house	0	2/12/2025, 3:18 PM	2/12/2025, 3:18 PM

4. Click **Save**

5. Back on the Event details screen, under **Behavior**, make sure **Enter** is checked. With this setting, a profile falls into the journey, when they qualify for the selected audience.

The screenshot shows the 'Event: Audience qualification' configuration screen. At the top, there are standard UI elements: a trash bin icon, a copy/paste icon, an eye icon, a 'Cancel' button, and a prominent blue 'Save' button. Below these are several input fields and sections:

- Label:** A text input field containing "New checking account opened".
- Audience ***: A dropdown menu currently set to "SecurFinancial Checking Account Opened".
- Behavior ***: This section is highlighted with a red rounded rectangle. It contains two options: " Enter" and " Exit".
- Namespace ***: A dropdown menu currently set to "Email (Email)".
- Merge Policy**: A text input field containing "Default Timebased".

6. Click **Save**, to save the configuration.

Exercise 2.3 – Compose the email message

Your challenge: SecurFinancial has provided you with some brand guidelines, but the email marketing specialists are currently not available, so you will need to compose a compelling email message.

The solution: Use the AI Assistant for content generation to help you compose the email message.

Step 1: Click on the **Email** action.



Result: The action's detail pane opens on the right

Step 2: Configure the email

1. Give your action a Label for example Welcome Message.

Actions: Email

Label Welcome Message

Description

ID 02a724a6-e211-4eb6-8c31-a766e64f8022

Category Marketing

Email configuration * SecurFinancial-Email_Marketing X

Review [Frequency rule](#) for the selected category and channels.

Edit content Edit content

2. You can leave the description field blank.

3. Click the **Edit Content** button to open the the content editor.

Step 3: From the Edit content screen click on **Edit Email Body** to access the Email Designer

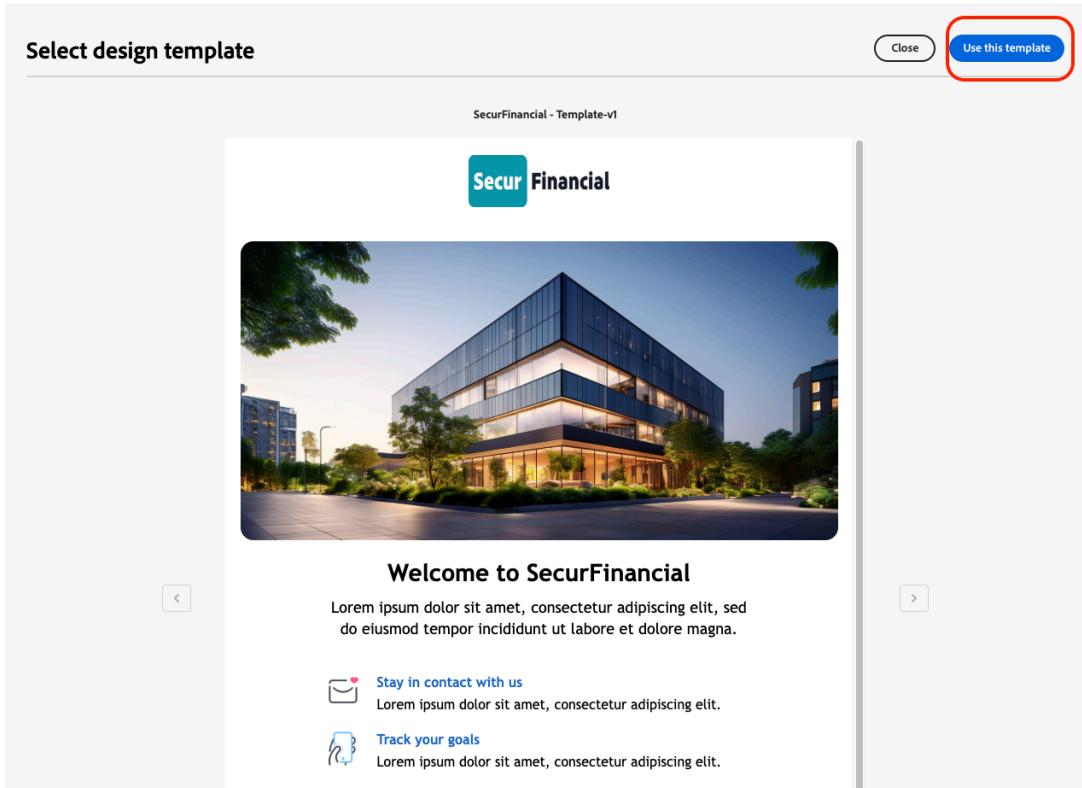
The screenshot shows the 'Email - Welcome Message' configuration page. On the left, there's a sidebar with 'SMS', 'Email - Welcome Message' (which is selected and highlighted in grey), and 'Push - Welcome notification'. The main area has a header 'Email - Welcome Message' with buttons for 'View configuration details' and 'Content template'. Below the header, there's a preview window showing 'SecurFinancial' from 'securfinancial@securefinance.enablementadobe.com'. To the right of the preview, under 'Header', are fields for 'From name' (set to 'SecurFinancial') and 'From email' (set to 'securfinancial@securefinance.enablementadobe.com'). Under 'Subject line', it says 'No email subject line defined'. Under 'Body', there's a note 'Use the Email Designer for visual editing or uploading HTML' and a button labeled 'Edit email body' which is circled in red.

Step 4: Navigate to the Saved Templates tab and click on the template called *SecurFinancial - Template-v1*. The template defines the layout of your email.

The screenshot shows the 'Create your email' interface. At the top, there are three options: 'Design from scratch', 'Code your own', and 'Import HTML'. Below that, there's a section titled 'Select design template' with a search bar and a 'Sort by Last modified' dropdown. Under 'Sample templates', there's a link to 'Saved templates' which is circled in red. A specific template entry, 'SecurFinancial - Template-v1', is highlighted with a red rectangle. The table below shows columns for 'Name', 'Date created', and 'Last modified'. The row for 'SecurFinancial - Template-v1' is highlighted with a red rectangle.

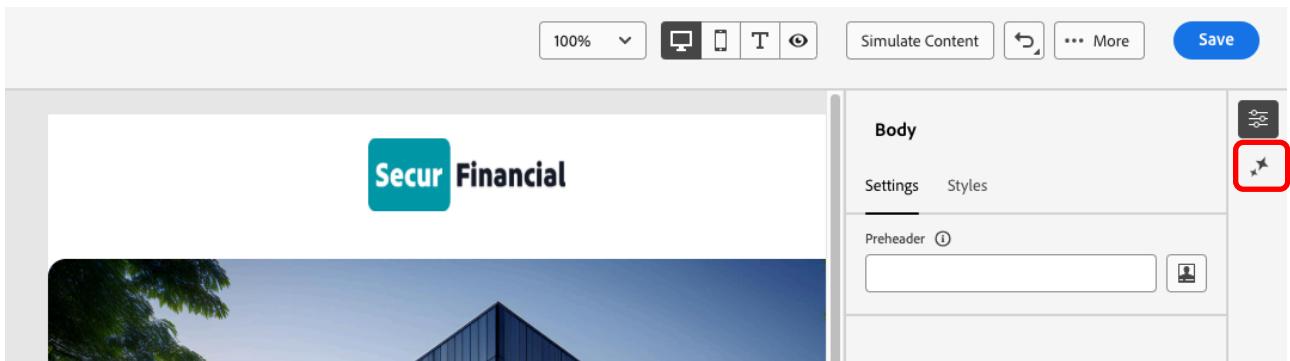
Name	Date created	Last modified
SecurFinancial - Template-v1	2/21/2025, 5:33:06 PM	3/7/2025, 3:09:45 PM

Step 5: Click the Use this template button.



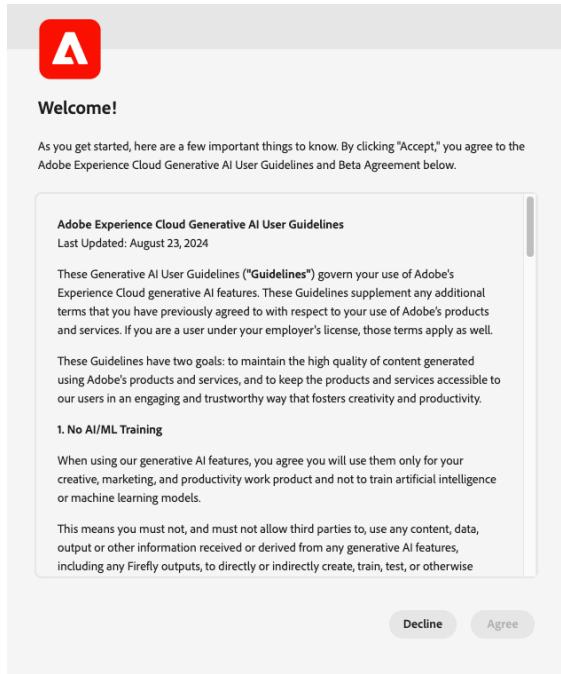
Result: You are now in the Message Designer. Use the AI assistant to generate the email content.

Step 6: Click on the two stars on the far right, to open the AI assistant.



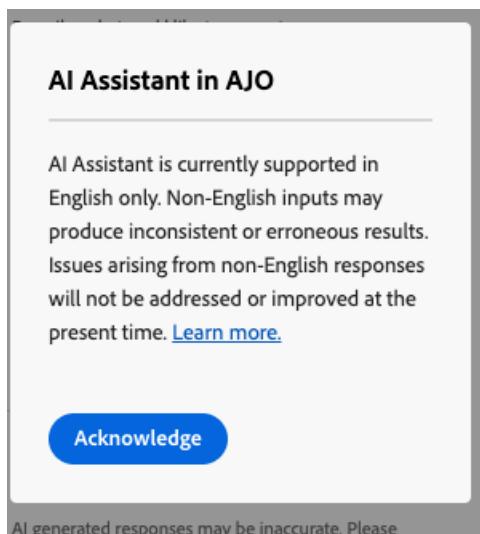
When you open the AI Assistant for the first time, you need to accept the **Adobe Experience Cloud Generative AI User Guidelines and Beta Agreement** before you can use the feature.

Step 7: Scroll down to the bottom of the text and click on agree.



Result: The AI Assistant pane opens on the right side.

Step 8: Click the **Acknowledge button** in the disclaimer pop up

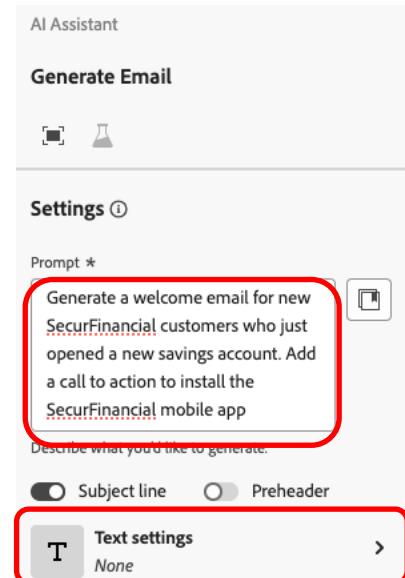


Step 12: Let's generate some content:

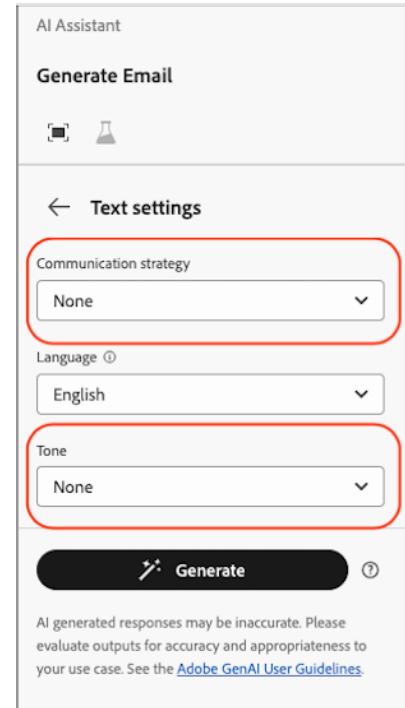
1. Copy and paste this prompt, or add your own:

"Generate a welcome email for new SecurFinancial customers who just opened a new checking account. Add a call to action to install the SecurFinancial mobile app."

2. Toggle the **Subject line** slider to the right to have the AI Assistant generate the subject line as well as the content.



3. Click on Text settings an choose you preferred **Communication strategy** and **Tone** from the dropdowns.

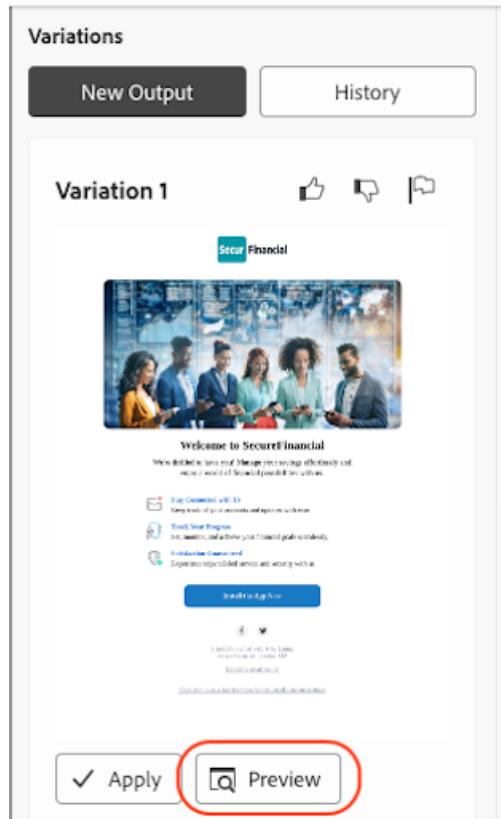


4. Click on **Generate**

Result: Two variations are generated.

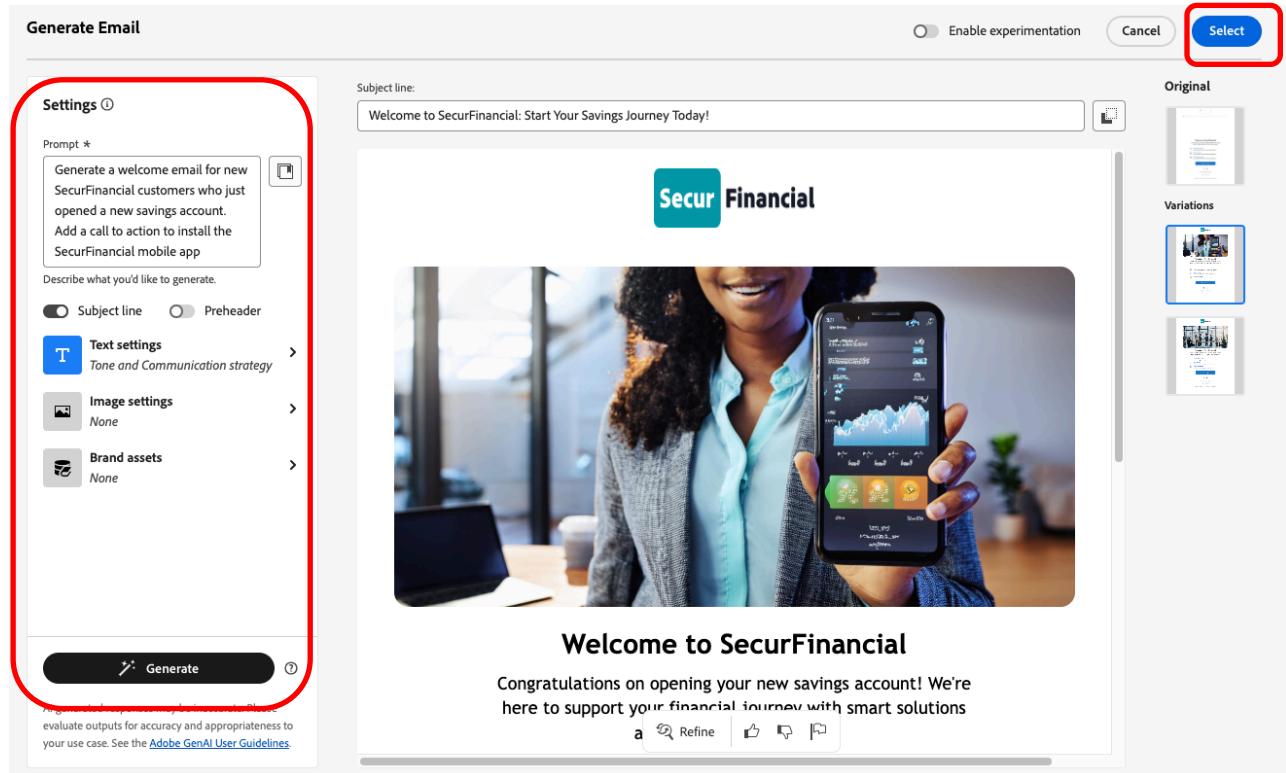
Step 11: Select a variation – your variation will look different to the screenshot in the workbook!

1. Click on the **Preview** button of one of the generated variations.

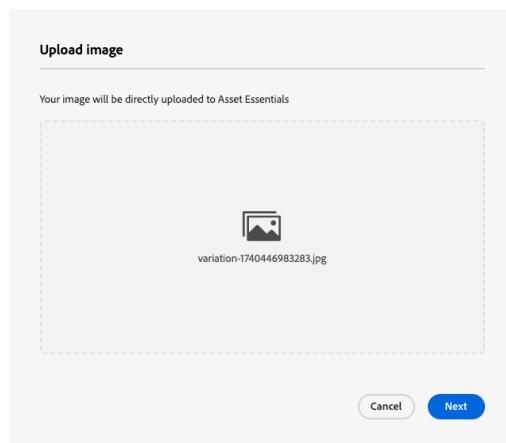


2. Review the two variations and select the one you prefer, you will modify it in the next step. If you want to have the AI make changes, you can change the settings or the prompt on the left side of the page and generate new variations.

3. Review the variations - you can modify your input in the **Setting** section and generate new variations.
4. Select one of the variations and click the **Select** button to apply the variation to your email.



5. Back on the email designer page, click save
6. You are prompted to upload the image to Asset Essentials, click **Next** on the modal

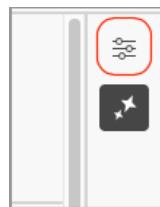


7. Click **Import** on the next screen
8. Double click on the **SecurFinancial** folder
9. Click on **Import**

Result: The images are uploaded to Asset Essentials and are available to be re-used.

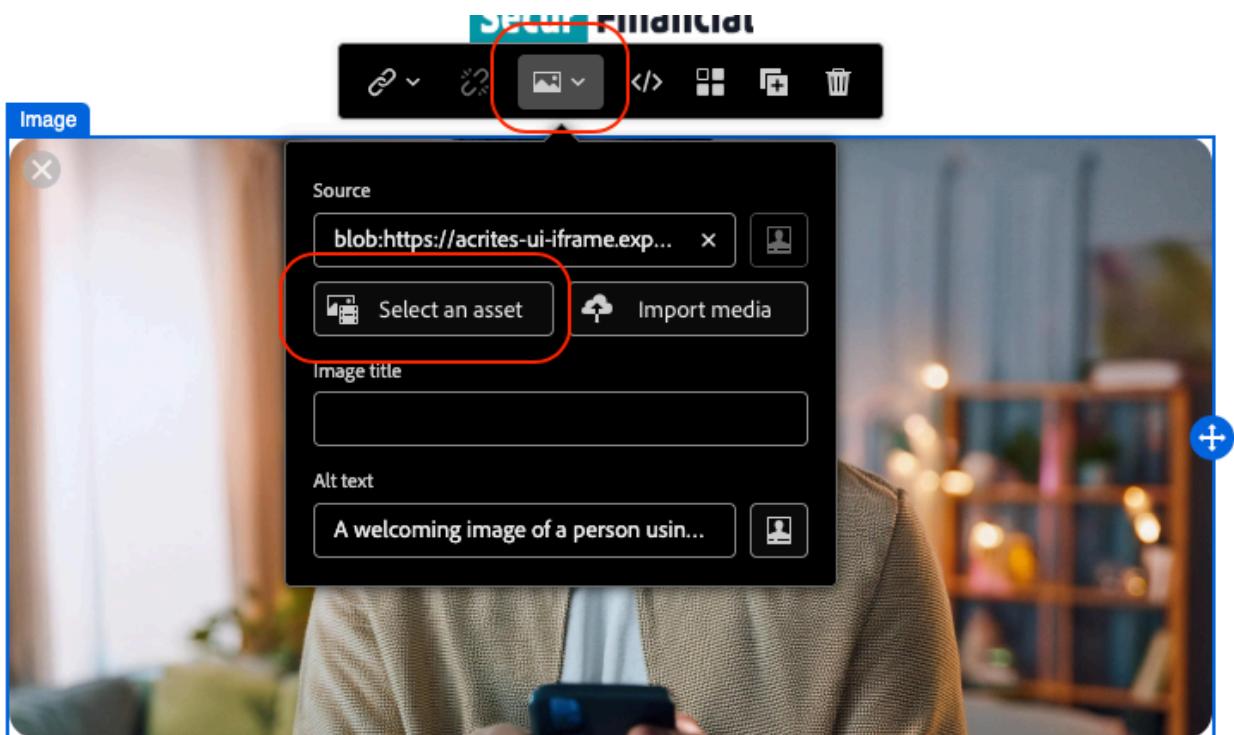
Step 12: Manually modify the email

1. Click on the on the right side of the screen to manually edit the content.

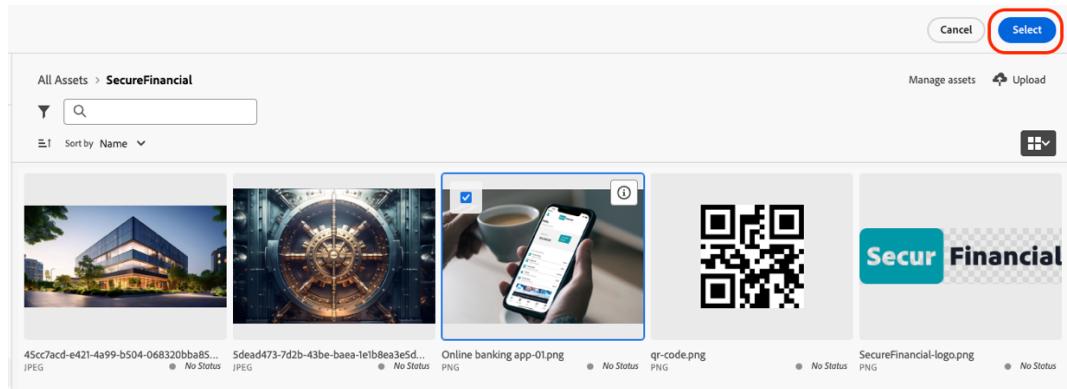


Now you can modify your email. Let's change the image :

1. Click on the hero image and select the image icon.
2. Click on Select an asset



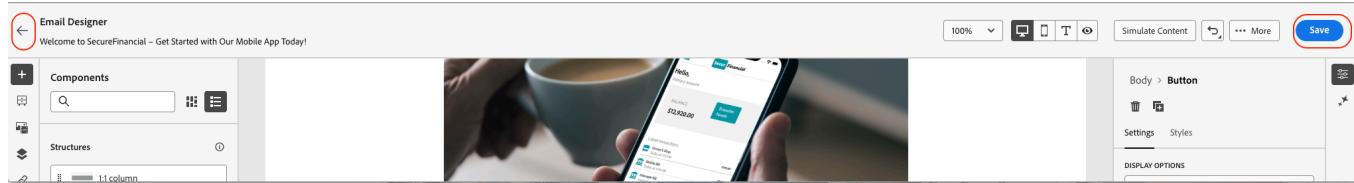
3. On the next screen, double click on the **SecureFinancial** folder and select an image.
4. Click on the **Select** button to apply it to your email.



You can make changes to any of the elements on the page.

Step 13: Once you are done, click **Save**

Step 14: Click the arrow on the top left of the page on this and the next page, to return to the journey.



Bonus Exercise:

Click on the Ai assistant icon to activate the AI Assistant again.

1. Click on the hero image -> the Ai Assistant generated new images which you can apply
2. Play around with the different options. For example, change the prompt or toggle the **Reference style** button to the right.
3. Click on a **text element**, you can now generate content just for the text you marked

Lesson 3 Dynamic Content

Your challenge: You need to make sure that only customers who have not already installed the app are asked to install it. Anyone who already has the app installed should only receive a general welcome message. You do not want to make the journey flow more complex.

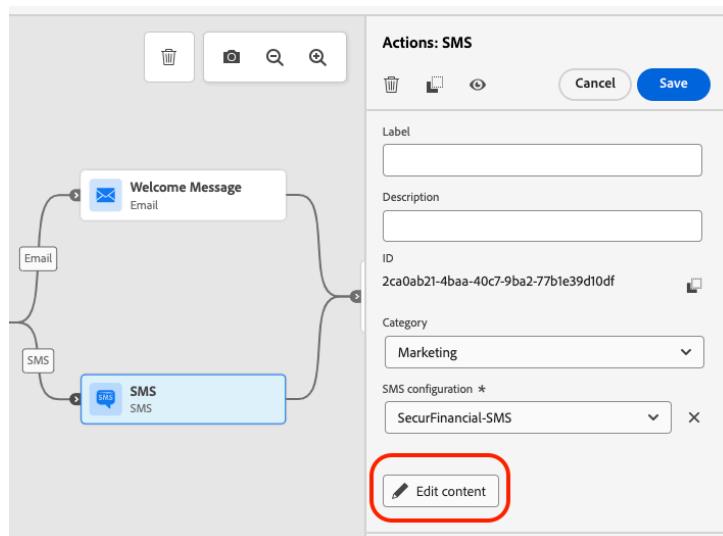
The Solution: Dynamic content allows you to adapt the content of your messages based on conditional rules that can be made up of profile attributes, contextual events or audiences. In this exercise you will apply it as an example , but it can be applied across all channels.

Exercise 3.1 – Apply dynamic content to the SMS message

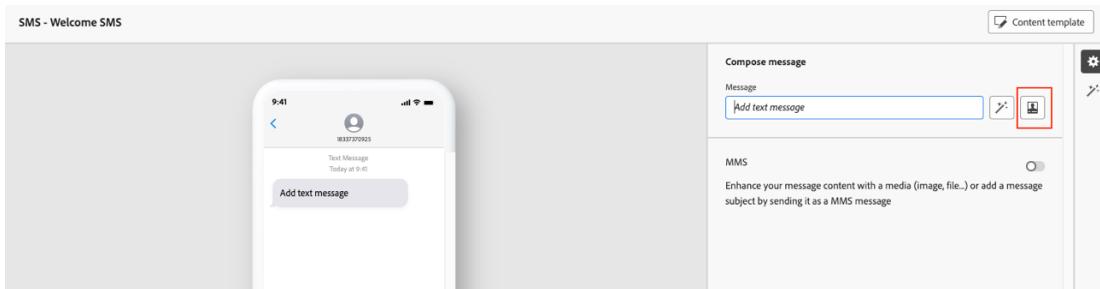
Step 1: Open the SMS action from the Journey Template ("your_seat_number-Welcome Journey").



Step 2: Click on "Edit Content".



Step 3: Click on the personalization icon under “Compose Message” section to open the personalization editor screen.



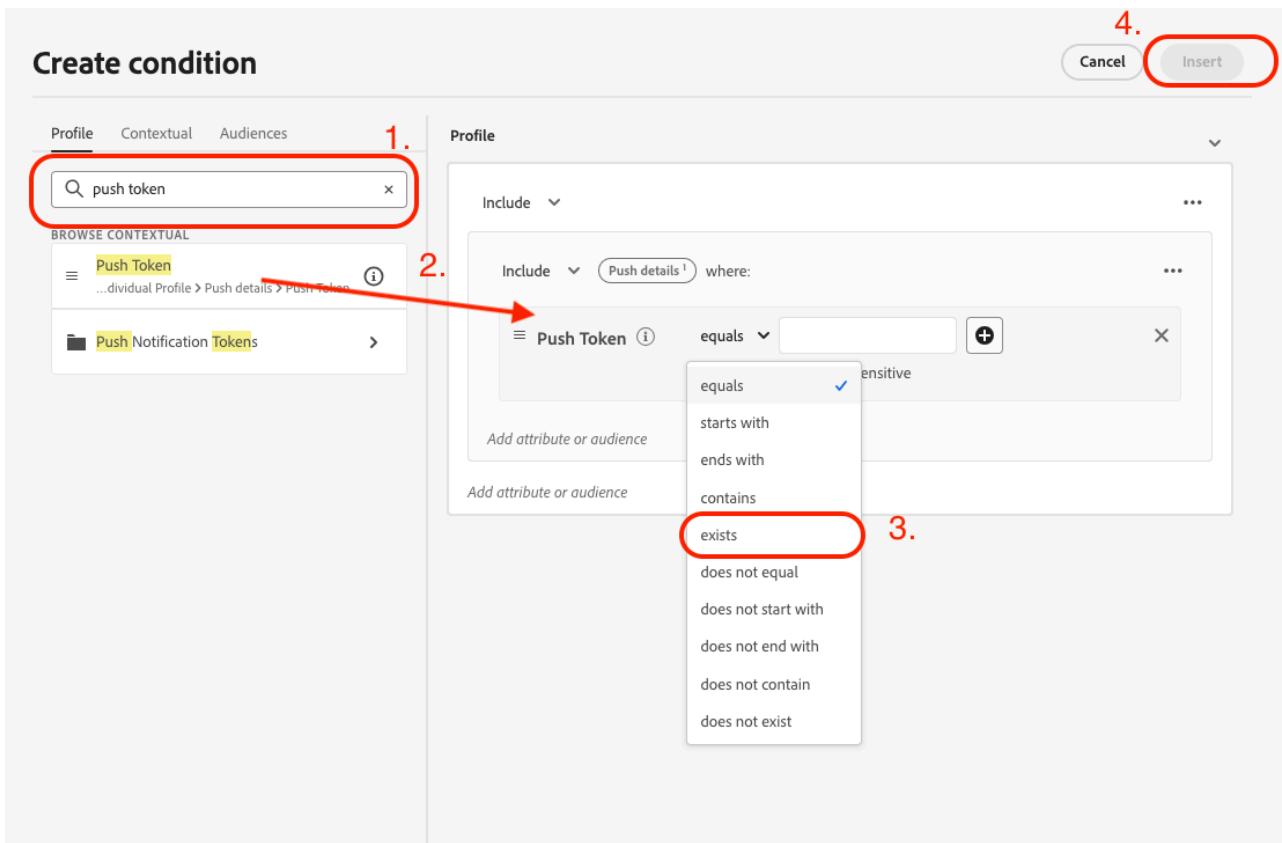
Step 4: Once the screen opens, click on “Conditions” in the left navigation to view or create conditional rules for the content.

Step 5: Click on "Create new" to create a condition from scratch.

The screenshot shows the 'Message' screen in Adobe Journey Optimizer. On the left, a sidebar lists navigation options: Profile attributes, Audiences, Offer decisions, Contextual attributes, Helper functions, Favorites, Conditions (which is selected and highlighted in grey), and Fragments. The main area is titled 'Conditions' and contains a search bar and a large empty box with a delete icon. Below this box, the text 'There are no conditions saved yet' is displayed. A red box highlights the 'Create new' button, which is located at the bottom of the empty box. In the top right corner, there are 'Cancel' and 'Save' buttons. To the right of the main area, a preview window shows a single step labeled '1 Welcome to SecurFinancial'.

Step 6: Once the condition builder screen loads:

1. Search for "Push token" in the search bar under profile.
2. Drag the Push token profile attribute to the condition builder on the right.
3. Select the **exists** function from the drop down.
4. Click on Insert.



Step 7: Remove everything from the code editor at this point and add the following code in the text box (select all) and paste in the code editor:

```
{%#if select _Push_details1 from profile.pushNotificationDetails where
_Push_details1.token.isNotNull() %}
```

Welcome to your new SecurFinancial checking account! Discover the SecurFinancial mobile app, designed for effortless banking. Manage accounts, transfer funds, and monitor transactions securely, anytime, anywhere. Open the app

```
{%else%}
```

Welcome to your new SecurFinancial checking account! Discover the SecurFinancial mobile app, designed for effortless banking. Manage accounts, transfer funds, and monitor transactions securely, anytime, anywhere. Click here to install the app: <https://demo-system-next.s3.amazonaws.com/dxdemo/summit/index.html>

```
{%/if%}
```

Message

The screenshot shows the 'Message' editor interface. On the left, there's a sidebar with various categories like Profile attributes, Audiences, Offer decisions, etc. The main area is titled 'Profile attributes' with a search bar and a list of items: '_experience', '_repo', '_techmarketingdemos', 'Billing Address', 'Billing Address Phone', 'consentPoliciesIDMap', and 'consentPoliciesResultMap'. To the right is a code editor window containing the following script:

```

1 1 #if select _Push_details1 from profile.pushNotificationDetails where
2 _Push_details1.token.isNotNull() %
3 Welcome to your new SecurFinancial checking account! Discover the SecureFinancial
4 mobile app, designed for effortless banking. Manage accounts, transfer funds, and
5 monitor transactions securely, anytime, anywhere. Open the app
6
7 Welcome to your new SecurFinancial checking account! Discover the SecureFinancial
8 mobile app, designed for effortless banking. Manage accounts, transfer funds, and
9 monitor transactions securely, anytime, anywhere. Click here to install the app:
10 https://demo-system-next.s3.amazonaws.com/dxdemo/summit/index.html
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Step 10: Then Click on **Save** again. And now you have added dynamic content to the SMS.

The screenshot shows the Adobe Journey Optimizer interface. On the left, a workflow diagram is displayed with two main nodes: 'Welcome Message' (Email) and 'SMS'. Arrows indicate a flow from the 'Welcome Message' node to both an 'Email' node and an 'SMS' node. The 'SMS' node is highlighted with a blue border. On the right, a modal dialog box titled 'Actions: SMS' is open. The 'Save' button in the top right corner is circled in red. The dialog fields include: Label (empty), Description (empty), ID (2ca0ab21-4baa-40c7-9ba2-77b1e39d10df), Category (Marketing), and SMS configuration (SecurFinancial-SMS). A 'Edit content' button is also present at the bottom of the dialog.

Lesson 4 – Content Experimentation

Your challenge: You have several approaches for the push message in mind but are not sure which one will be most efficient. You want to make sure the most effective message is sent.

The Solution: Content experiments allow you to optimize content for the actions in your journey. Through content experimentation, you can expose a given variation of a message to a group of randomly selected users and another variation/treatment to a different set of randomly selected users. After sending the message, you can then measure the outcome metrics you are interested in. In this lesson, you will apply content experimentation to the push message.

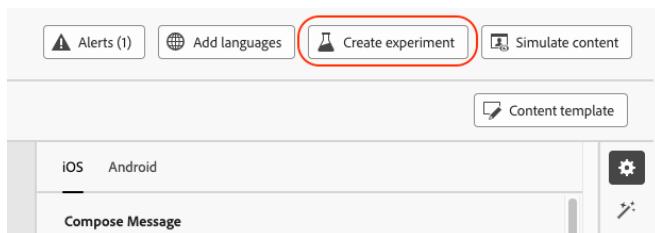
Exercise 4.1 – Create a content experiment

Step 1: From the journey canvas, click on the **In-app message** action.



Step 2: Click **Edit Content** on the Actions detail pain on the right, to open the content editor.

Step 3: Click on the **Create experiment** button on the top right of the page.



Result: You are on the page titles **Create experiment – Push Welcome notification**.

Step 4: In the Details section, select **Clicks (AJO)** from the Success metric dropdown.

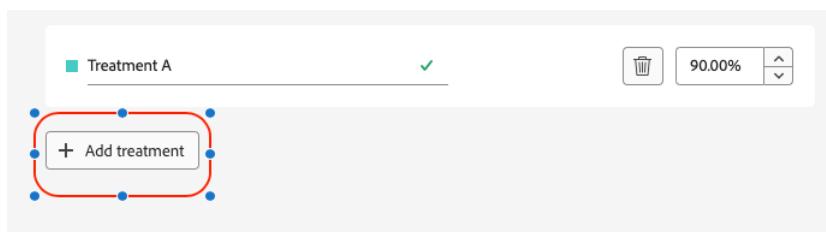
After experiment is created, you can start designing the content for your treatments. If you already created content for this campaign, the content will apply to the first treatment.

Details

Success metric ?
Clicks (AJO)

Step 5: Toggle the **Distribute evenly** button to the right. To split the traffic evenly between all treatments.

Step 6: Click the **Add Treatment** button to add a second treatment.



Step 7: Click the **Create** button on the top right

Result: The treatments are shown on the left of the **Push editor page**.

112 - Welcome Journey
● Draft | Version 1 (Latest) | ✓ Saved a few seconds ago

? Alerts (4) ? Add languages ? Add Business Rule ? Experiment settings ? Simulate content

? Hide panel ? Content template

Treatments +

- ▼ ■ Treatment A ?
 - ? Push Notification
- ▼ ■ Treatment B ?
 - ? Push Notification

Push Notification

9:41
Monday, June 3

Welcome to SecurFinancial now
Discover endless possibilities with our app! Uncover nearby ATMs, explore new features, and empower your financial journey. Open the app now and start making the most of what's right at your fingertips!

? Expand view

iOS Android

Compose Message
 Silent Notification ?

Title
Welcome to SecurFinancial ✓ ? ?

Body
Discover endless possibilities with our app! Uncover ... ✓ ? ?

On click behavior
Body click behavior

Add media
The iOS version allows you to use an Image, Video or a GIF that will be displayed within your notification
Add media
 ? ? ? Add media

Buttons
iOS category ?

Exercise 4.2 – Configure the treatments

Treatment A is the initial SMS. Modify treatment C.

Step 1: Click on the **Push notification** beneath Treatment C

The screenshot shows the 'Push Notification' configuration for Treatment C. On the left, under 'Treatments', 'Treatment A' has a 'Push Notification' item selected, which is highlighted with a red oval. In the center, there's a preview of an iPhone screen displaying a push notification with the title 'Welcome to SecurFinancial' and the message 'Did you know you can find an ATM near in the SecurFinancial app? Try it now!'. On the right, the 'iOS' tab is selected for message composition. The 'Compose Message' section includes fields for 'Title' (containing 'Welcome to SecurFinancial') and 'Body' (containing 'Did you know you can find an ATM near in the Secur...'). Both fields have a green checkmark and a personalization icon. A large red rectangle highlights both the 'Title' and 'Body' input fields. Below these, the 'On click behavior' section shows a 'DeepLink' field set to 'dxdemo://atm'. The 'Add media' section contains a URL field with 'https://'. At the bottom, there's a 'Buttons' section.

Step 2: On the right pane, add a **Title**

"Welcome to SecurFinancial"

Step 3: Add the following text:

"Did you know you can find an ATM near in the SecurFinancial app? Try it now!"

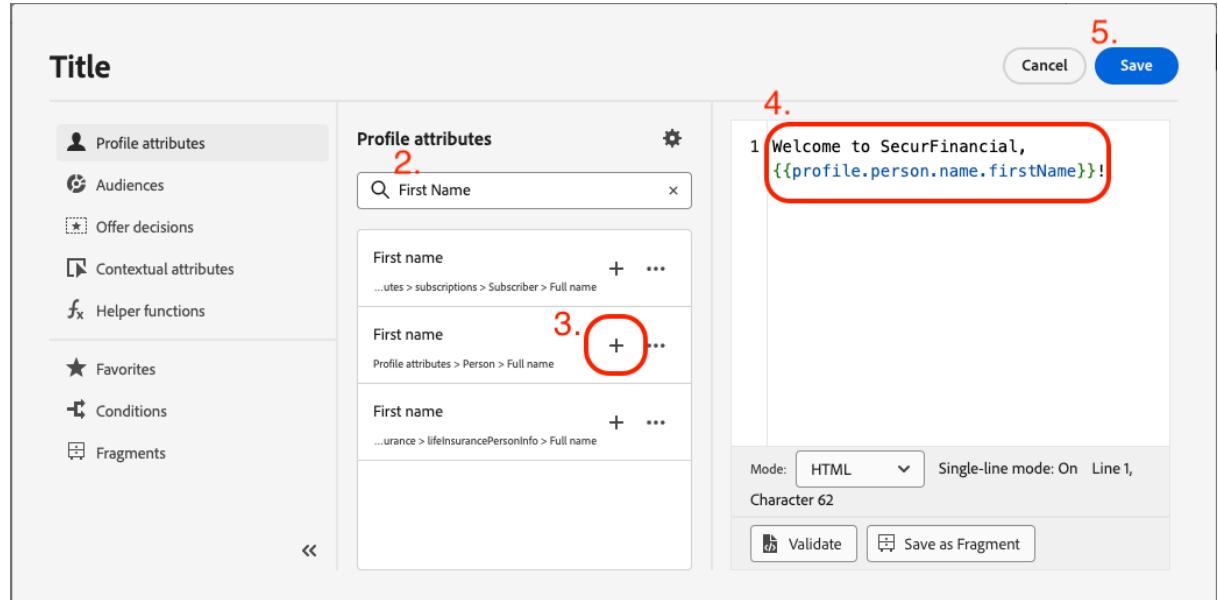
Step 4: Let's add some personalization to the message title:

1. Click on the **personalization icon** next to the title field:

This screenshot shows the 'Personalization' editor. It displays a search bar with the placeholder 'Search Profile Attributes' and a magnifying glass icon. Below the search bar, there's a list of attributes: 'First Name', 'Last Name', 'Email', 'Gender', 'Age Group', 'Device Type', and 'Location'. The 'First Name' attribute is highlighted with a red oval.

2. In the personalization editor, in the Profile attributes, search for **First Name**

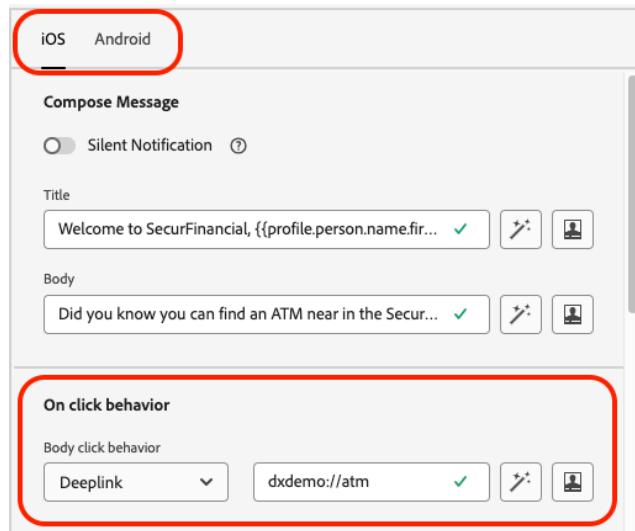
- Click the plus next to the **Profile>Person>Fullname** attribute to add it to the text.
- Add a comma before the personalization field.



- Once you are done, click **Save**.

Step 5: Change the **on click behavior** to open on the ATM page. On both the **iOS** and the **Android**, in the **On click behavior** section:

1. From the **Body click behavior** drop down, select **Deeplink**
2. Copy and paste this link: *dxdemo://atm* into field next to the dropdown.



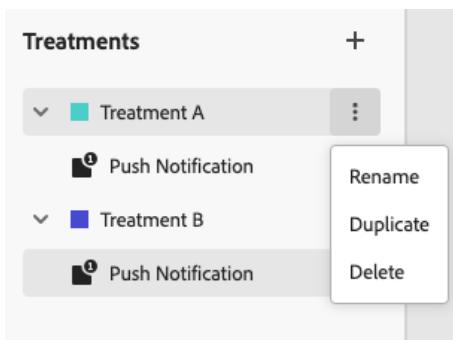
Result: Your content experiment is ready.

Step 6: Return to the Journey canvas and save your journey.

Bonus Exercise

You can create another treatment based on the initial email:

Click on the three dots next to Treatment A and select **Duplicate**.



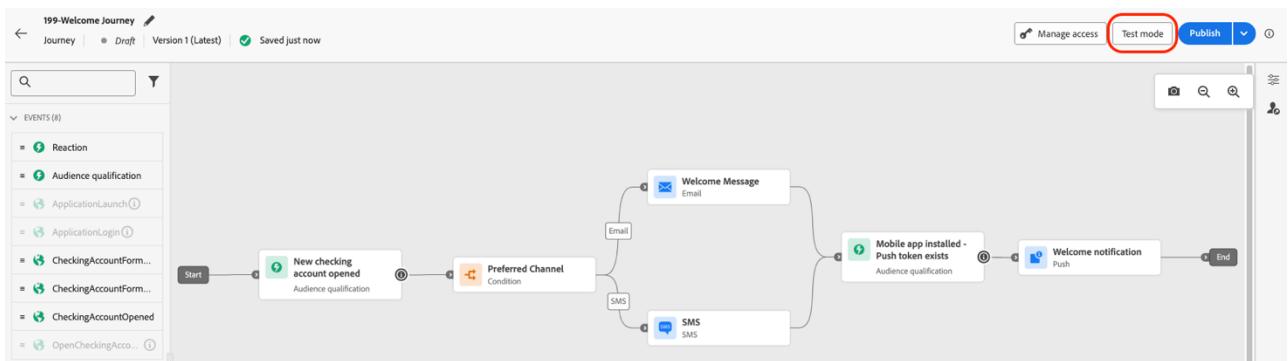
→ Modify the content using the AI assistant to create the content of a treatment.

Lesson 5 – Test your Journey

Testing the journey before publishing is a critical step. This helps the practitioner to see if the journey logic is set up as intended.

Exercise 5.1 – Test your welcome journey

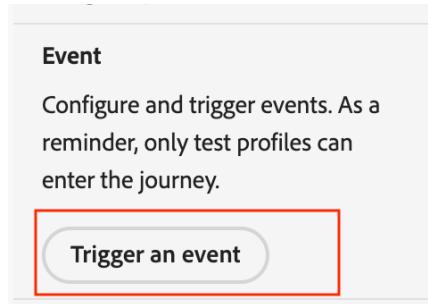
Step 1: To activate the test mode, click the **Test mode** button, located in the top right corner of the welcome journey.



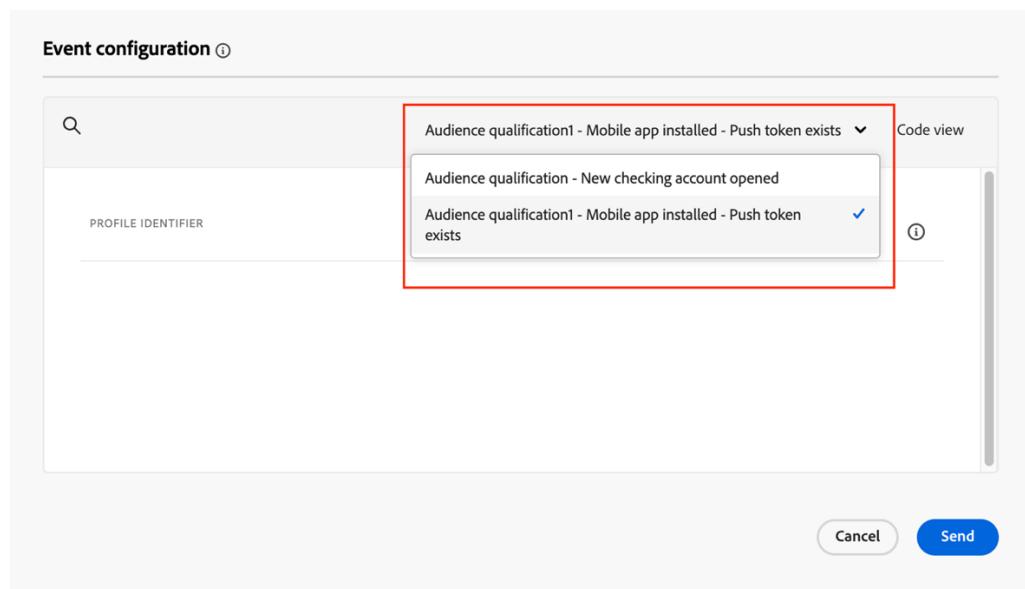
Step 2: Once the Test mode is activated you will see a section on the left side of screen that will allow you to change parameters for the test mode.

The screenshot shows the Adobe Journey Optimizer interface in "Draft (Test)" mode. A red box highlights the "Test mode" sidebar on the left. The sidebar contains sections for "Event" (with a "Trigger an event" button) and "Results" (with a "Show log" button). The main workspace shows the journey flow starting with an event "New checking account opened".

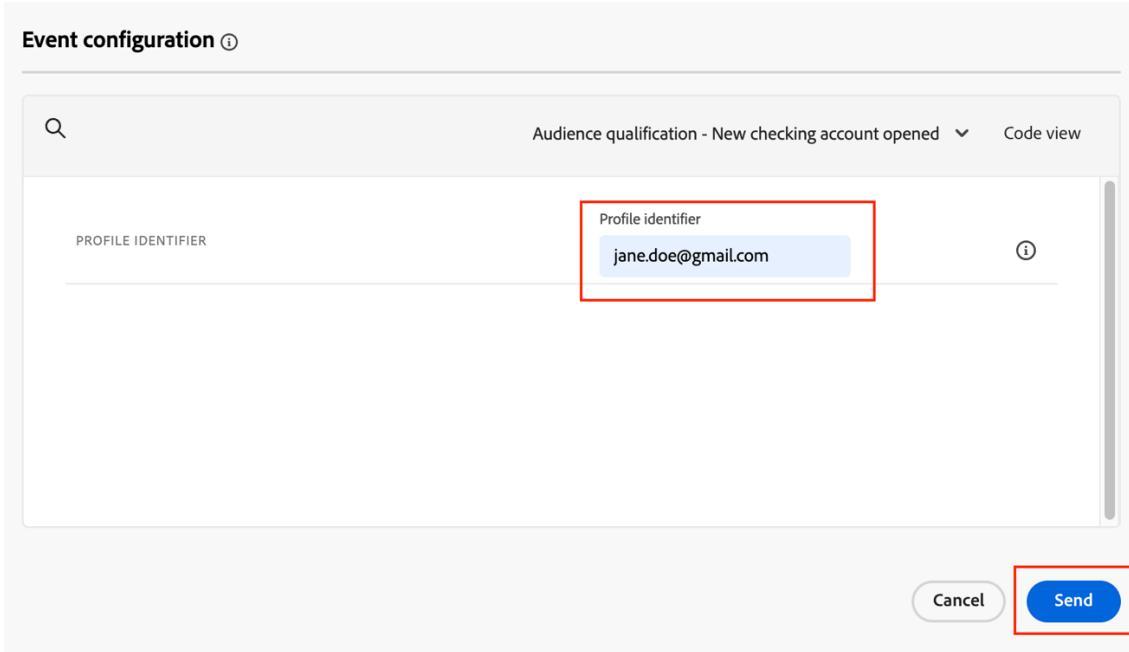
Step 3: Click on the **Trigger an event** button to configure and send events to the journey.



Step 4: When the Event Configuration screen opens, you will see the Event configuration screen open with option to provide profile identifiers for both Audience Qualification nodes.



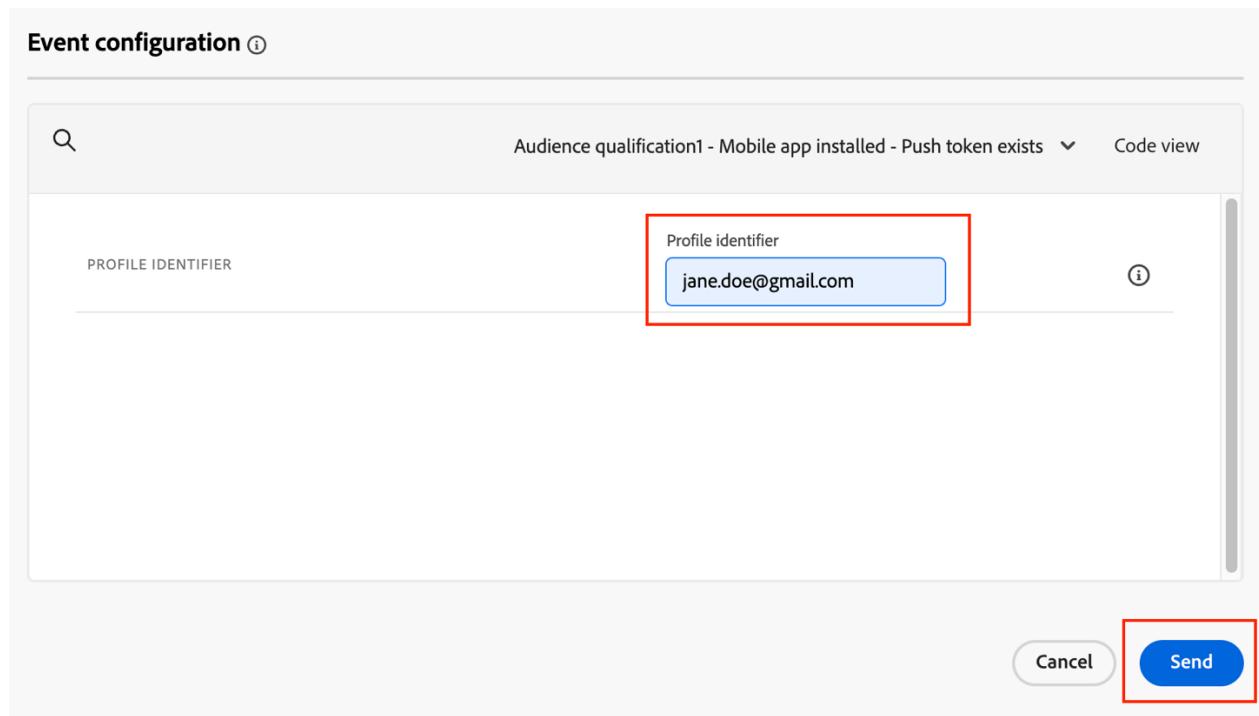
Step 5: Select the first one, in this case **Audience Qualification – New checking account opened** and provide the email id with which you opened the account in first exercise and click on **Send**.



Step 6: You should see an "Event was sent successfully" message and the connectors turn green to show the profile is progressing in the journey.

Step 7: When the line reaches the email/SMS node, check your inbox or phone for the message based on your selected preference. If you had SMS as a preference, then you will receive a message to open the app.

Step 8: Click on Trigger an event again and in Event configuration provide the email for the second Audience Qualification node and click on **Send**.



Result: As the line progresses, you will receive a push notification.

Lesson 6 – Content Cards

Your challenge: You would like to continue the onboarding experience in the mobile app as well, without being intrusive.

The solution: Content cards are a messaging feature in Adobe Journey Optimizer that delivers personalized and engaging content directly within mobile apps and websites. Unlike traditional push notifications, Content Cards integrate seamlessly into the user interface, offering persistent, non-intrusive updates that enhance user interaction and experience.

In this lesson you create a content card in the mobile app as part of the customers welcome experience.

Exercise 6.1 – Set up content card in a campaign

Step 1: Go to Campaigns in left navigation bar of Adobe Journey Optimizer.

Step 2: Click on “Create Campaigns”.



Step 3: Click on “Scheduled-Marketing” campaign type and then click on **Create**.

Step 4: Fill in the details in the campaign form:

1. Provide the name of the campaign (or choose your own) – “Welcome Content Card Campaign – *your seat number*.”
2. Select “Content Cards” from Actions menu and **disable** the toggle for “**Enable additional delivery rules**”
3. Select “**SecurFinancial-Content-Card-In-App**” from Content card configuration
4. Under Audience section, click on **Select Audience** and choose audience with name “Seat Number <*your seat number*>.”
5. Then click on “**Edit content**”.

The screenshot shows the 'Properties' tab of a campaign form. Step 1 highlights the 'Name' field containing 'Welcome Content Card Campaign - 999'. Step 2 highlights the 'Content Card' action configuration, which includes the 'Action name' 'Content card-20250307131523' and 'Content card configuration' set to 'SecurFinancial-Content-Card-In-App'. Step 3 highlights the 'Edit content' button. Step 4 highlights the 'Audience' section with the message 'Campaign will be activated for Seat Number 999' and the 'Replace audience' button. Step 5 highlights the 'Edit content' button again.

Step 5: After clicking on "Edit Content", the content editor will open

1. Under **Title** you can paste the following text or choose your own:

"Welcome to SecurFinancial!"

2. Under **Body** you can paste the following text or choose your own:

"Thank you for downloading the app. You can find ATMs, track your spending and more. All within the app."

3. Under **Media URL** provide this link for the logo:

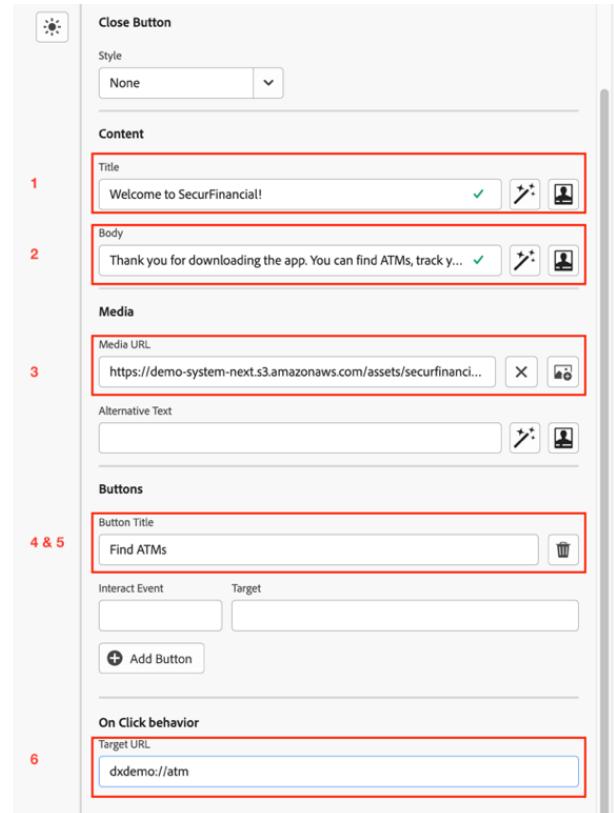
<https://demo-system-next.s3.amazonaws.com/assets/securfinancial/home-loan.jpg>

4. Click on **Add Button**.

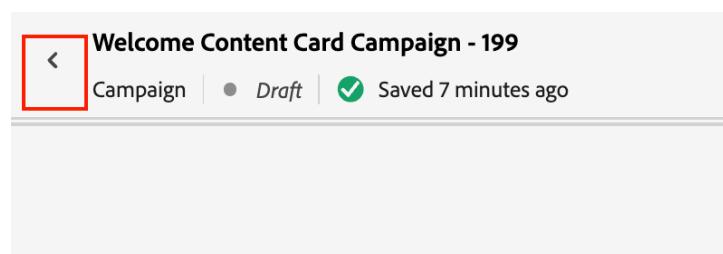
5. Under **Button Title** paste the text "*Find ATMs*".

6. Under **Target URL** under **On Click behavior**, please provide this URL:

dxdemo://atm



Step 6: Click on back arrow and go back to main form.



Step 7: Click on **Review to activate**.

Properties * Required

Name *

Welcome Content Card Campaign - 199

Description

Add description...

Manage access Review to activate Duplicate

Step 8: Click on **Activate**.

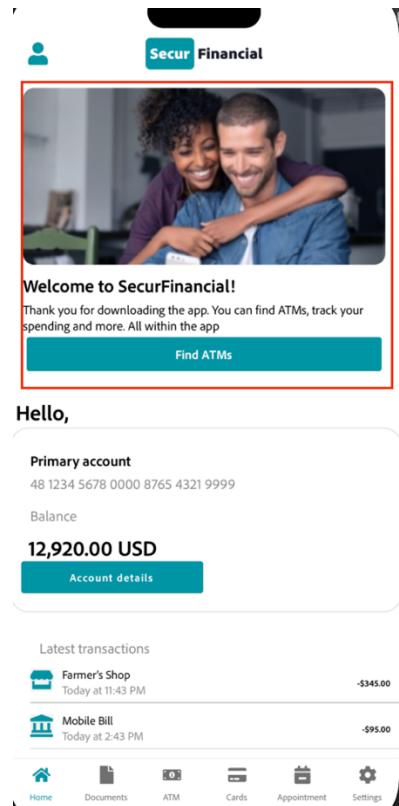
Properties

Manage access Simulate content Duplicate Activate

Step 9: Now the campaign is activating. Wait for the campaign status to **Live**.

Step 10: Once the campaign is Live, go to the app – make sure you are logged in with the email id with which you have created the account.

Result: Now when you go the **Home** page of the app, you see the content card activated.
You might have to refresh the page, by swiping down!



Congratulations, you have completed all exercises!

See the **Additional Resources** section for video tutorials on the topics we covered in this lab.

Additional Resources

Videos tutorials available on Experience League:

Step 9: [Introduction to building a journey](#)

Step 10: [Create content with the Email Designer](#)

Step 11: [Create content using the AI Assistant for content generation](#)

Step 12: [Configure content experiments for emails](#)

Step 13: [Create content cards](#)

Step 14: [Push notifications - Overview](#)

Step 15: [Configure, author, and deliver SMS messages](#)

Thank You!

Thank you for participating! Please rate this lab in the Summit 2025 mobile app survey!