Adobe Experience Platform Customer Account Schema Design – UI Lab

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LAB OVERVIEW

Defining schemas and understanding how data is described by those schemas is one of the first things a customer will do on Adobe Experience Platform. This is the first step to ingesting data to the platform to gain marketing insights.

This lab will introduce you to the Adobe Experience Platform schema design user experience. You will learn how to create your own schemas, as well as browse existing components.

LEARNING OBJECTIVES

What should you walk away with after taking this Lab?

- Understand Experience Data Model concepts
- Build a profile schema
- Understand tools for exploring field groups in XDM
- Add standard field groups to your schema
- Customize standard field groups
- Add custom fields to your schema
- Build a custom field group
- Create enumerated fields

LAB RESOURCES

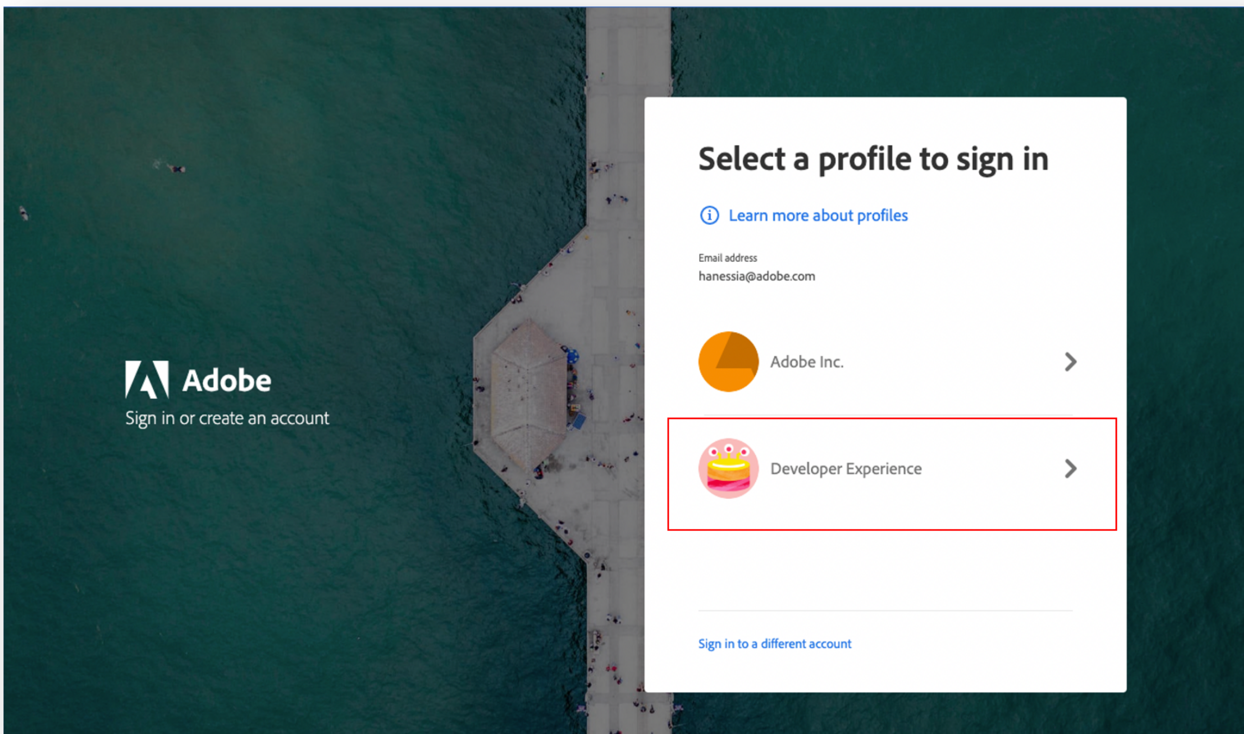
- Customer Account ERD
- Customer Account Mapping Sheet

LAB TASKS

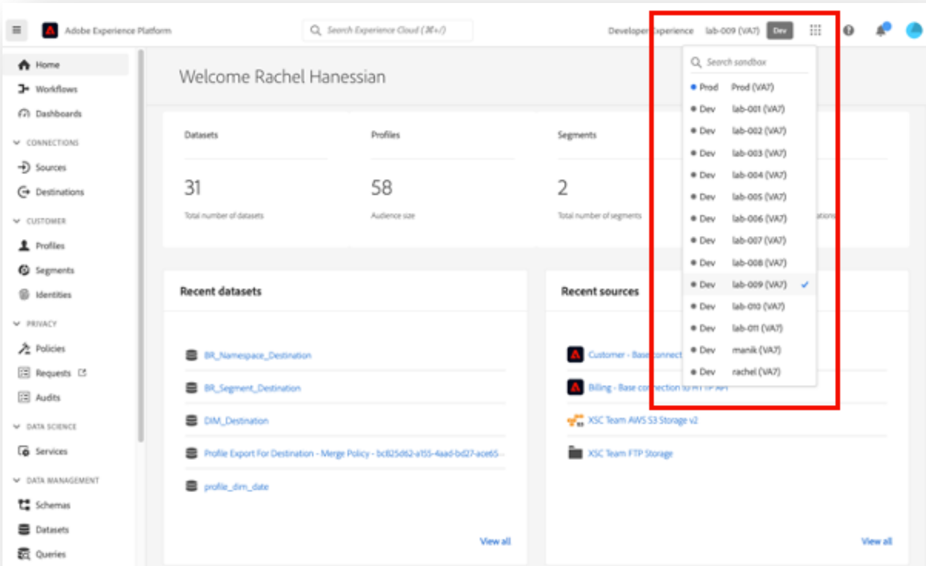
- Log into Adobe Experience Platform
- Build a profile-based customer account schema in the UI
    - Map from source to target XDM
    - Add standard field groups
    - Customize standard field groups
    - Create custom field groups
    - Create an enumerated field

1. LOG INTO ADOBE EXPERIENCE PLATFORM & NAVIGATE TO SCHEMAS

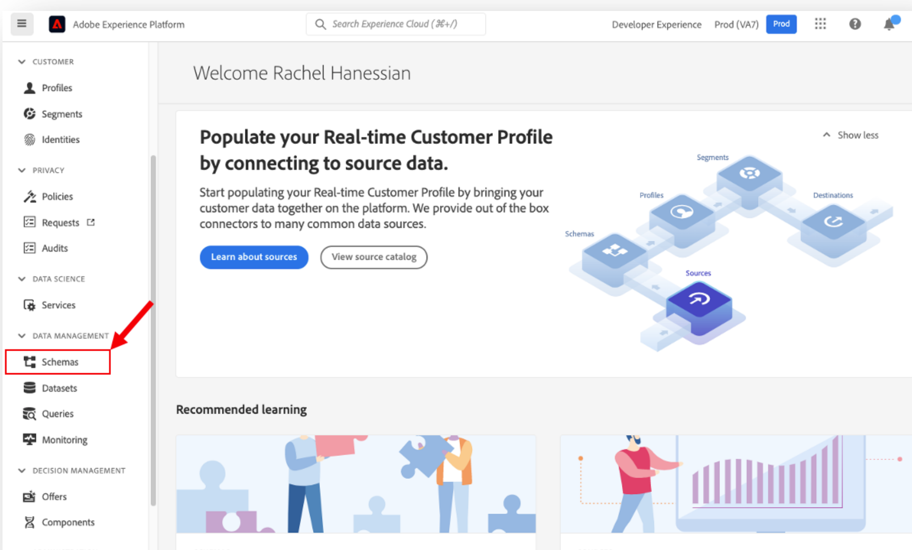
1. Navigate to https://experience.adobe.com/ in your browser
2. **Log in** using your Adobe Experience Platform credentials.
   - **Select** the *Developer Experience* profile.



- **Select** the *sandbox #* on the top right which corresponds to your lab number.



3. Now that you are logged in and in the correct sandbox, click on the "Schemas" tab on the left rail



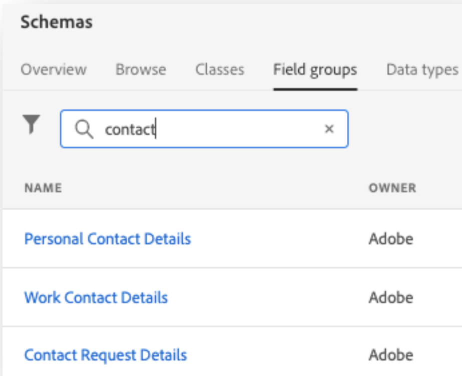
Note	There are some schemas that are pre-created in your sandbox. These include some schemas for your use cases that were pre-created, as well as Adobe Journey Optimizer auto created schemas. For this exercise you will be creating a new schema.

2. DETERMINE XDM MAPPINGS FOR CUSTOMER ACCOUNT SCHEMA

Yesterday during the SID lecture & Lab you built out an AEP ERD. The next step is to map those source attributes to attributes in XDM. During lecture you learned how to determine whether to use a standard field group or a custom field group based on your source data model, and what is available out of the box in XDM. For this activity, your task is to **determine whether to use a custom or standard field group for the following attributes, and write in the proposed XDM mappings.** See steps below for guidance.

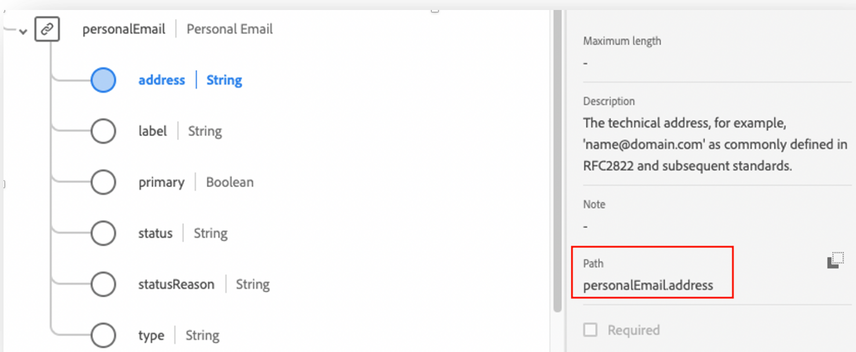
Source Table	Source Column	XDM Property	XDM Field Group
Customer Account	email		
Customer Account	mobile_phone		
Customer Account	billing_street_address		
Customer Account	billing_city		
Customer Account	billing_state		
Customer Account	billing_zip_code		
Customer Account	shipping_street_address		
Customer Account	shipping_city		
Customer Account	shipping_state		
Customer Account	shipping_zip_code		

4. **Browse** what is available out of the box by searching field groups by name. Since you are looking for attributes like email, address, etc, type "contact" into the search box.



5. **Browse** the results by **clicking** the blue hyperlink.

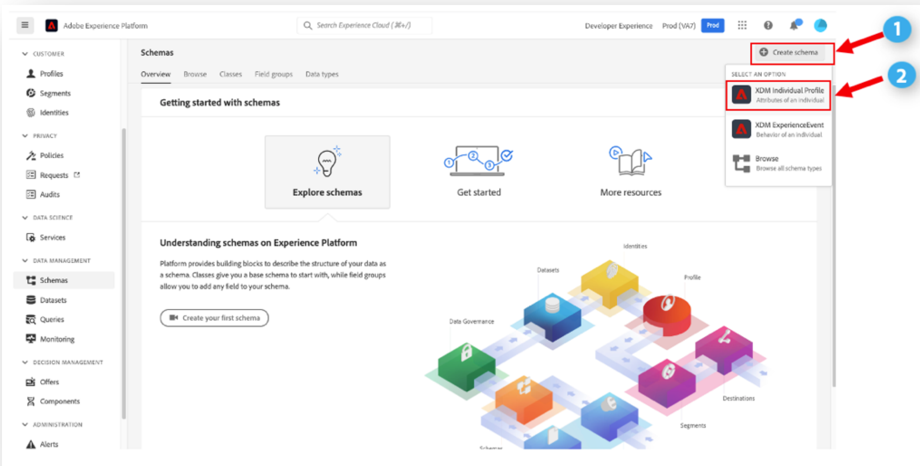
6. Note that each field has an associated dot notation path on the right rail that you can use for your mapping sheet.



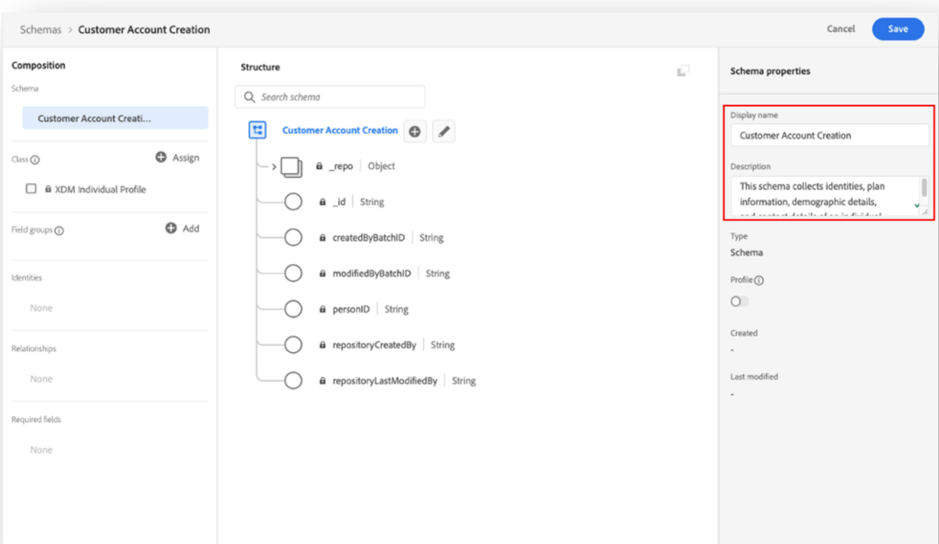
Note	You can use partial field groups, so just write in the attribute paths you need from the field group you identified.

3. BUILD A PROFILE-BASED CUSTOMER SCHEMA IN THE UI

7. Now that your mapping sheet is complete, you're ready to build a new profile schema. Start by clicking **Create schema > XDM Individual Profile**



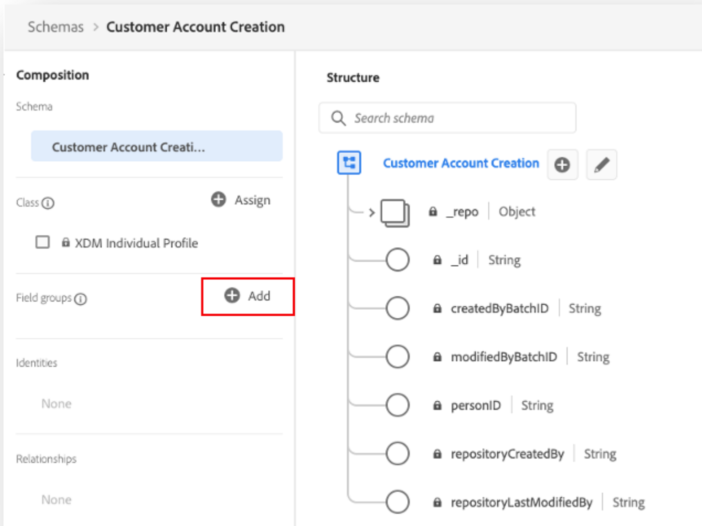
8. Profile class schemas allow you to collect attributes about an individual that will be stitched to the profile. The profile class itself contains fields that are not editable such as *modifiedByBatchID*, *PersonID,* etc.
9. **Give your schema a name and description** on the right rail
   - Display Name: *Customer Account Creation*
   - Description: *This schema collects identities, plan information, demographic details, and contact details of an individual.*



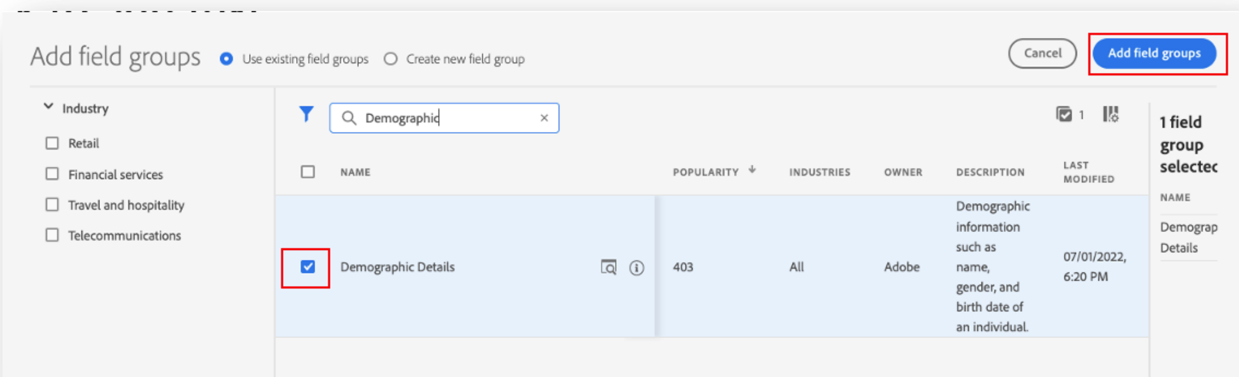
   - **Save** your schema using the save button on the top right.

4. ADD STANDARD FIELD GROUPS

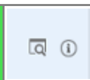
10. There are many field groups that exist as standard XDM in Adobe Experience Platform for you to add to your schema and customize. **Add** the *Demographic Details* field group to your schema.
    - Click the **+ Add** on the left rail in the field group section.



    - Search for *Demographic Details*, or find it by browsing the list. Check the checkbox besides it and **click Add field groups**.



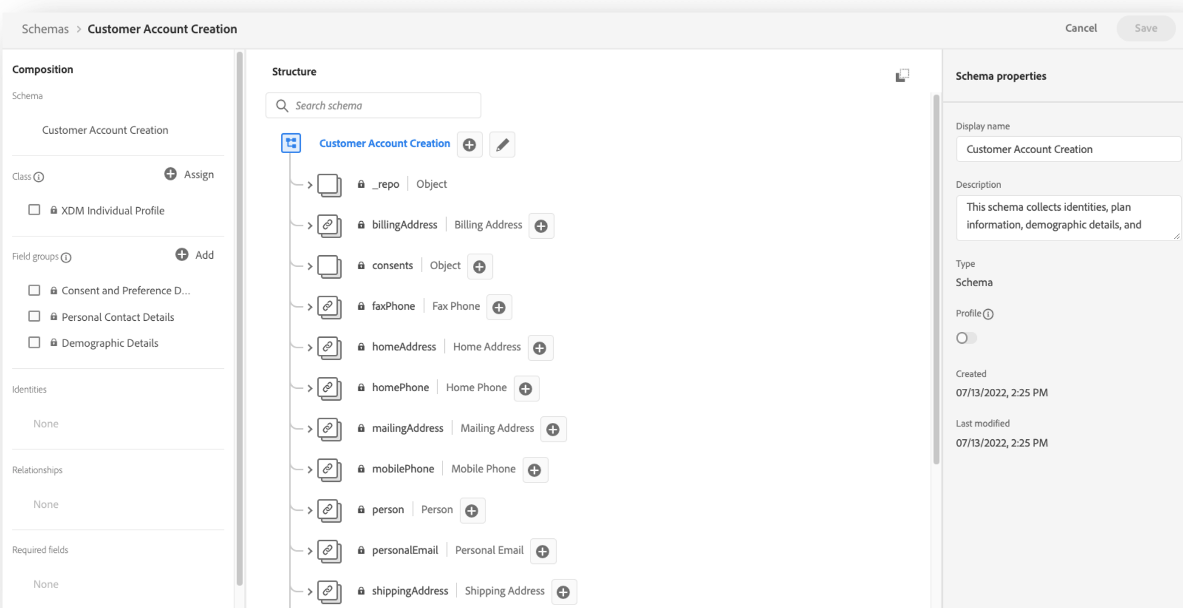
    - **Save** your schema using the save button on the top right.

Tip	 On the Add Field groups modal, try clicking the magnifying class to the right of each field group to view the structure of the field group before you add it to your schema.

11. Notice that that the *demographic details* field group has been added to your schema. It shows up under field groups on the left rail. There is also now a person object in your schema, brought in by the *demographic details* field group. **Expand** it by clicking the box to the left of the lock to inspect what is inside the object. Note it has a few fields not needed, but we will remove those attributes in a later step.
12. You need to add additional standard field groups. **Repeat the previous steps to add two additional field groups**:
    - *Personal Contact Details*
    - *Consent and Preference Details*

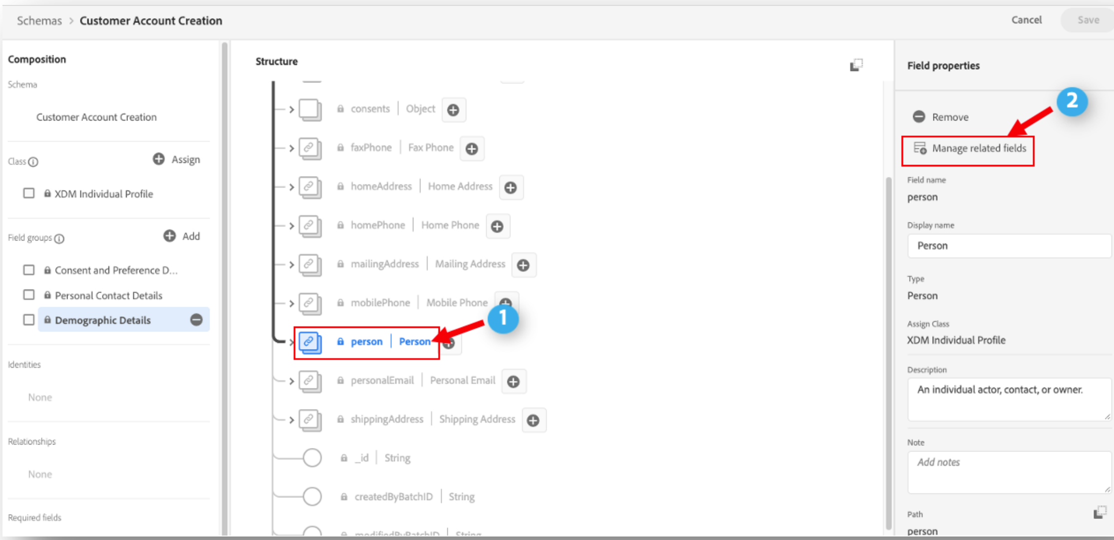
Tip	you can add multiple field groups to your schema at once by selecting multiple check boxes in the field group modal

13. **Save** your schema & **validate** that your schema looks like the below with three field groups on the left, and demographic and contact related objects in the tree structure:



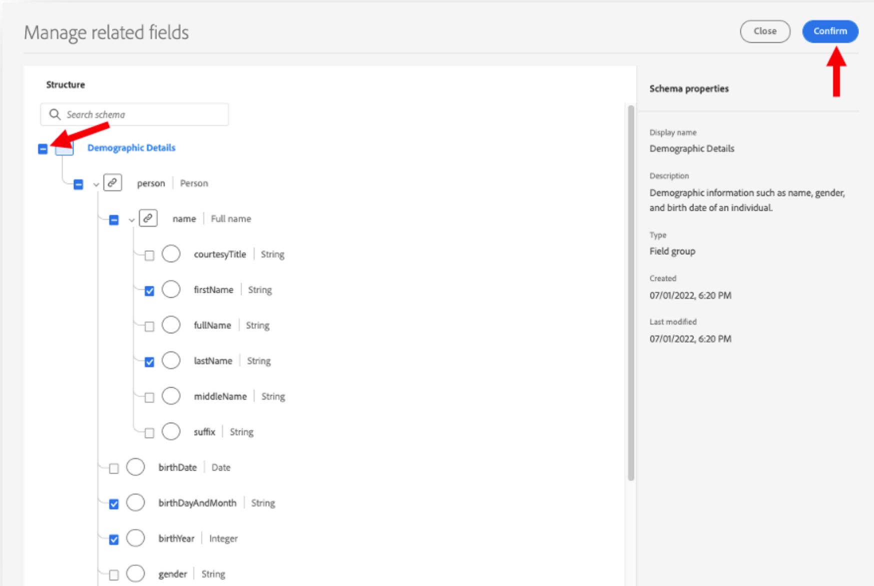
5. CUSTOMIZE STANDARD FIELD GROUPS BY REMOVING FIELDS NOT NEEDED

14. Demographic details field group brought in many fields, but based on your maping sheet, you only need *person.name.firstName, person.name.lastName, person.birthDayAndMonth, and person.birthYear*. **Remove fields not needed with Manage Related Fields.** Manage related fields allows you to remove standard fields from your schema, so you are only left with those you need.
    - **(1) Select** the *person* object on your schema> (2) **Click Manage related fields** on the right rail



- **Expand** the person object by clicking the chevron to the left of *person*.
- **Expand** the *full name* object by clicking the chevron to the left of the name object.
- **Deselect** all attributes besides the four you need (*person.name.firstName, person.name.lastName, person.birthDayAndMonth, and person.birthYear)*

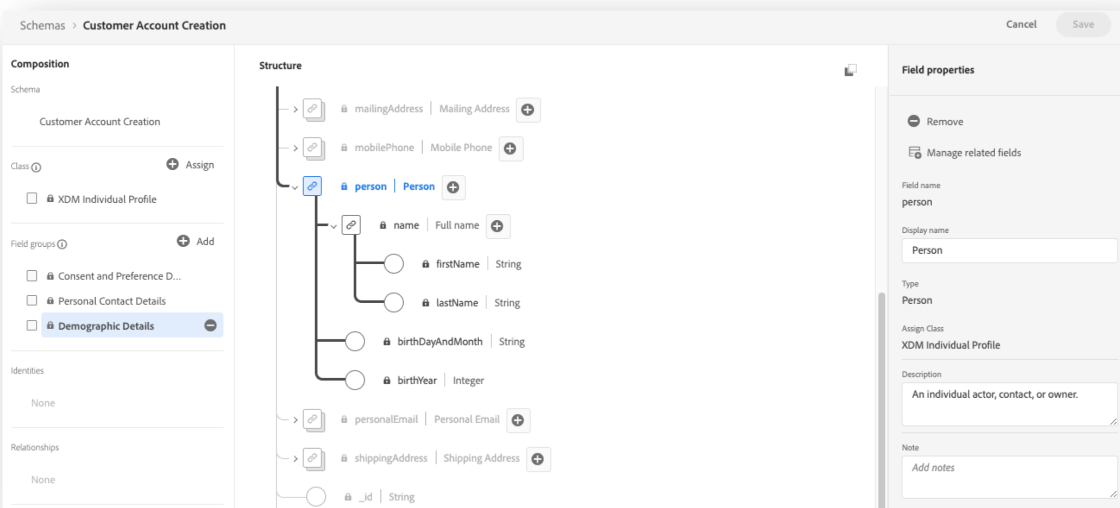
Tip	Try clicking the top-most checkbox to auto-deselect all child objects, and the reselect those you need!



- **Select confirm** on the top right once you are finished deselecting.

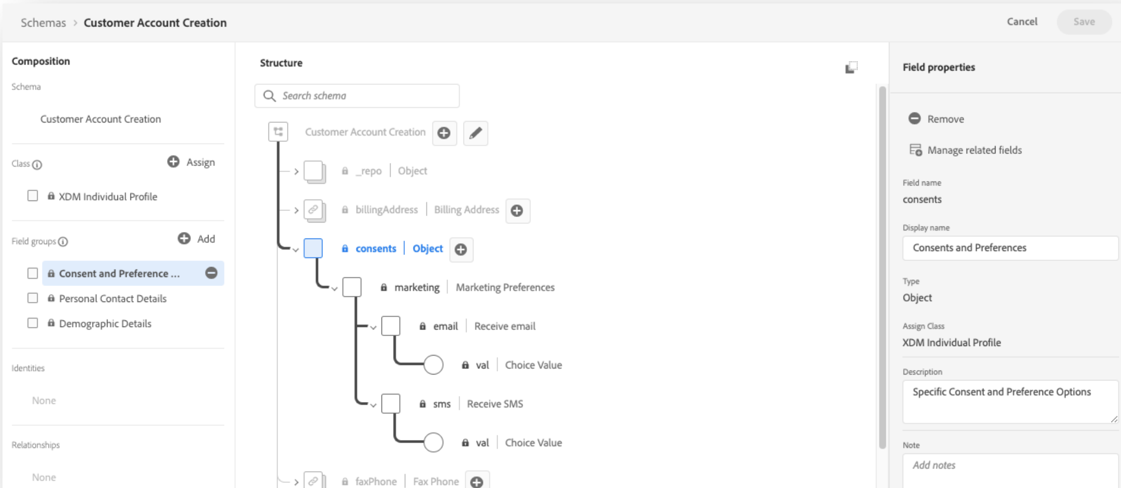
15. **Save & validate** by ensuring your schema matches the below. **Expand** the person object to inspect.

Tip	Try clicking the field group name on the left to highlight those fields in your schema



16. Notice that inside the *consents* object brought in by the *Consent and Preference Details* field group, you have some extraneous fields that are not needed for your use case. You know this because some of the fields brought in from the field group are not referenced on your mapping sheet. **Use the manage related fields process in** the previous step to remove fields not needed from the consent object. Only *consents.marketing.email.val* and *consents.marketing.sms.val* should remain in your schema when you are finished.

17. **Save & Validate** by ensuring your schema matches the below. When you are done with the previous step, your consents object should look the below screenshot:



18. Notice that *Personal Contact Details* field group brought in more fields than needed. Inspect your mapping sheet completed in the Mapping from Source to XDM section of this lab to validate which fields should be included. **Use manage related fields** to remove fields not needed from that field group.

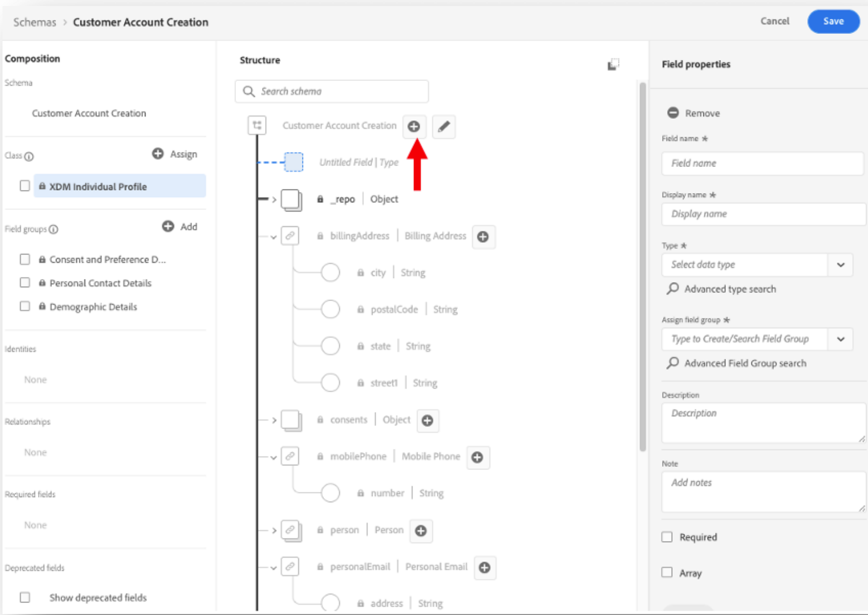
Tip	Remember you first need to click on one of the field group's objects within the schema to trigger **manage related fields** showing up on the right pane.

19. **Save & Validate.** When you are done with step 15, your *personal contact detail* field group should look like this (highlighted):

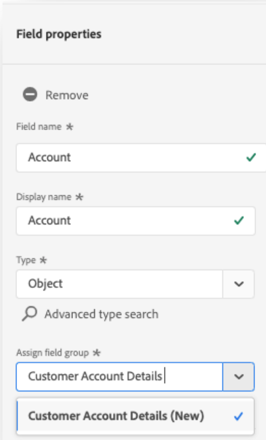
You are now finished with adding standard components to your schema. Great job! Let's move on to building some custom attributes for your schema.

6. ADD CUSTOM ATTRIBUTES TO YOUR SCHEMA

20. As discussed in the lecture, there are no standard out of the box components that model the customer account data fields you need to collect. Look back to your customer account schema ERD. Notice you need to collect attributes called: *_dxp.account.createDate, _dxp.account.endDate, _dxp.account.acqSource _dxp.plan.planID, _dxp.plan.name* & *_dxp.customerID*. For these fields, we will have to build custom fields. To add a new field, **click the plus button at the top of your schema.**



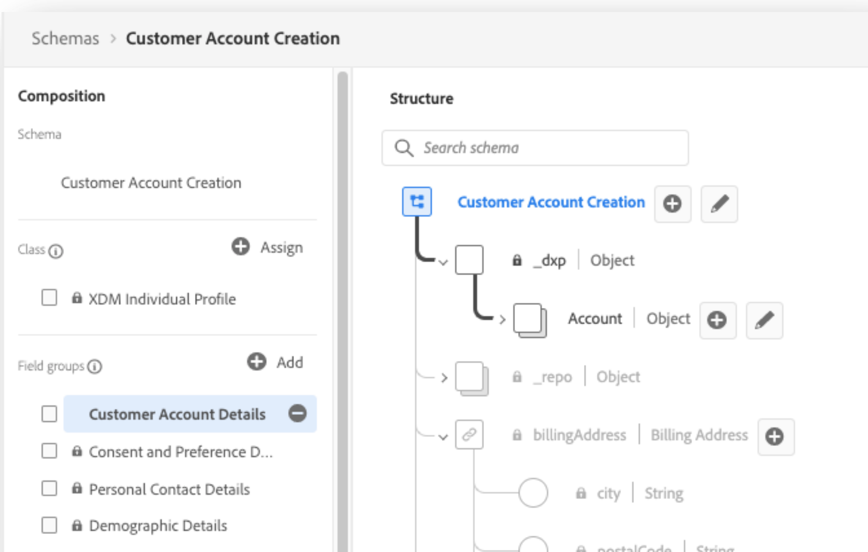
21. Notice the right rail opens with some fields for you to enter. **Create an account object** by filling out
    - Field name: *account*
    - Display Name: *account*
    - Type: *Object*
    - Assign Field Group: *Customer Account Details*



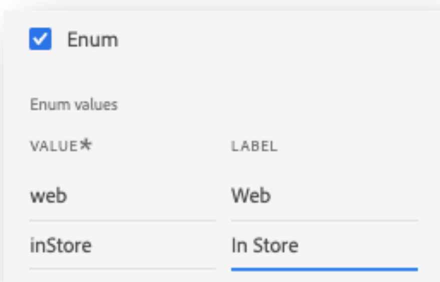
- **Select Apply** at the bottom to post your changes

Note	Your custom account object is under a _dxp tenant namespace. The namespace is used to differentiate your custom fields from the standard fields. All custom fields will fall under this namespace.

Note	Note your new custom field group that appears on the left rail under the field group section called *Customer Account Details.* It appears without a lock icon to show it is custom.

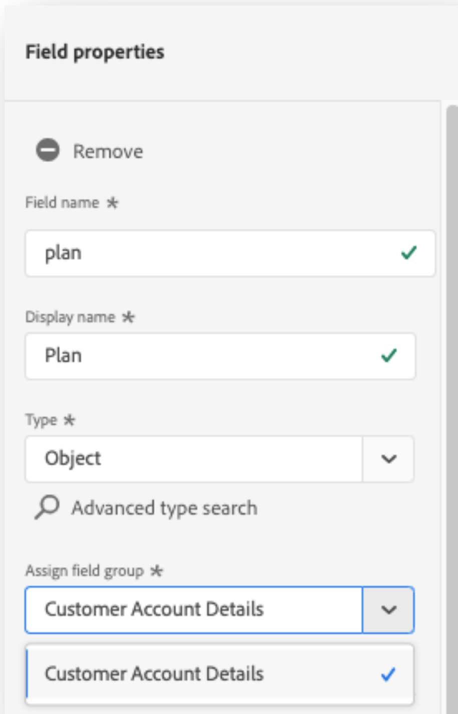


22. **Add Child Fields** for *createDate*, *endDate*, and *acqSource* under your account object by **clicking the plus sign** beside the account object
    - **Fill meta data on right rail** for *Create Date* attribute
        - Field Name: *createDate*
        - Display Name: *Create Date*
        - Type: *dateTime*
        - Notice field group has already been assigned to your custom field group because you are working within that field group's object
        - **Select Apply** at the bottom to post your changes
    - (click plus sign besides account) **& fill meta data on right rail** for *End Date*
        - Field Name: *endDate*
        - Display Name: *End Date*
        - Type*: DateTime*
        - Notice field group has already been assigned to your custom field group because you are working within that field group's object
        - **Select Apply** at the bottom to post your changes
    - (click plus sign besides account) **& fill meta data on right rail** for *acqSource*
        - Field Name: *acqSource*
        - Display Name: *Acquired Source*
        - Type*: String*
        - Notice field group has already been assigned to your custom field group because you are working within that field group's object
        - **Select Enum** checkbox to add validation for this field at ingestion, as well as suggested labels for segmentation. Add enum values *web;Web, inStore;In Store*



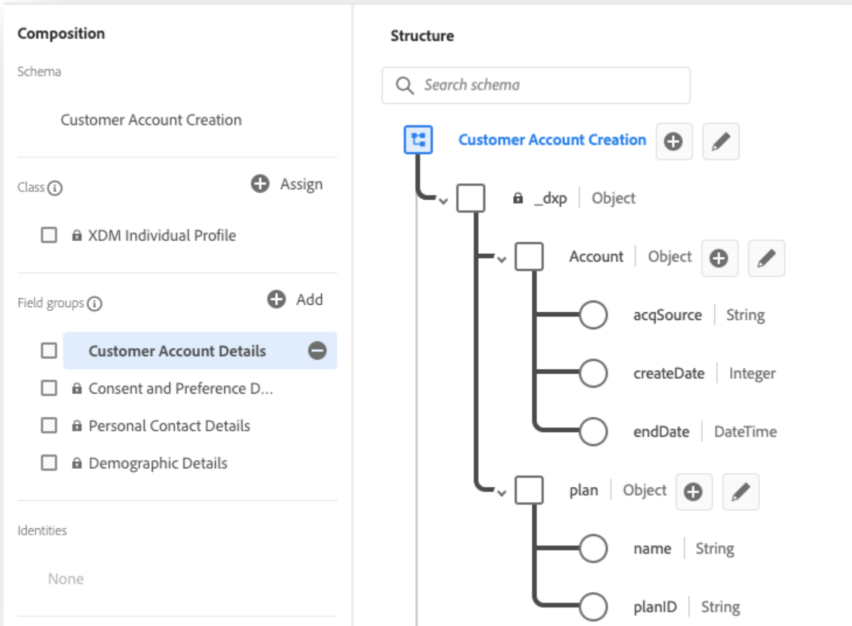
        - **Select Apply** at the bottom to post your changes
23. Your schema also needs a Plan object with a Plan ID and Name. You can see this in your mapping sheet. These attributes should be included under the *Customer Account Details* field group so that your plan and account details are centralized in one component. **Click the plus sign at the top of your schema** to add another field. Add a plan object
    - Field name: *plan*
    - Display name: *Plan*
    - Type: *Object*

- Assign field group: Since you are adding this field to the root of your schema, it could belong to any field group. You therefore must search for the field group you'd like to add it to. Start typing *Customer Account Details* and select that field group.

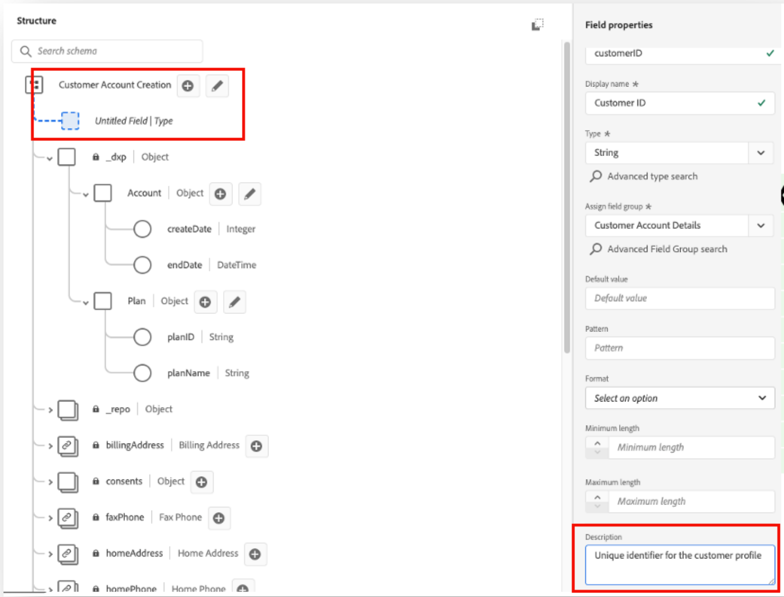


- Select **Apply** at the bottom to post your changes

24. **Add Child Fields** *planID* and *planName* under your Plan object by **clicking the plus sign** beside the Plan object
    - **Fill meta data on right rail** for plan*ID*
        - Field Name: *planID*
        - Display Name: *Plan ID*
        - Type: *string*
        - Notice the field group has already been assigned to your custom field group because you are working within that field group's object
        - **Select Apply** at the bottom to post your changes
    - (Click plus sign besides *Plan*) **& Fill meta data on right rail** for *Name*
        - Field Name: *name*
        - Display Name: Name
        - Type: *String*
        - Notice field group has already been assigned to your custom field group because you are within that field group's object
        - **Select Enum** checkbox to add validation for this field at ingestion, as well as suggestion list for segmentation. Add enum values *basic;Basic,ultimate;Ultimate,pro;Pro*
        - **Select Apply** at the bottom to post your changes
25. **Save & Validate.** When you are done with creating the account & plan object with child fields, your Customer Account Details field group should look like this:

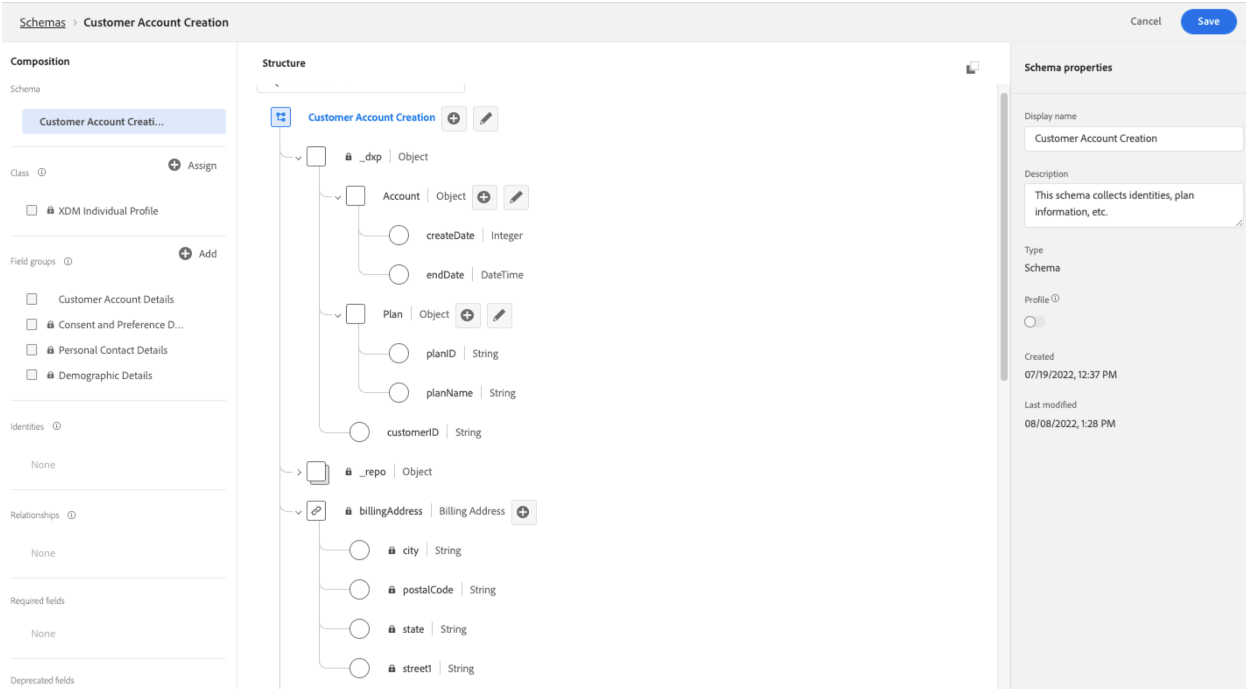


26. You need to create a customerID attribute which will serve as your unique primary identity to identify each unique record. Add it to the Customer Account Details field group.
    - **Click** the plus at the root of your schema
    - Field name: *CustomerID*
    - Display Name: *Customer ID*
    - Type: *String*
    - Assign Field Group: *Customer Account Details*
    - Description: *Unique Identifier for the customer profile*

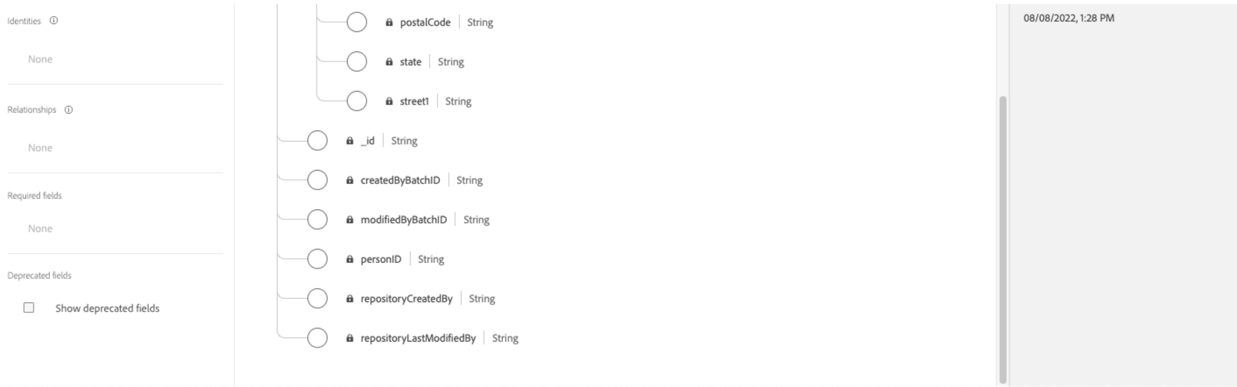


- **Select Apply** at the bottom to post your changes

You finished adding all attributes from your mapping sheet, and your schema is now complete! **Validate** that it looks like the UI screenshot below! You will come back to this schema to mark primary & secondary identities, as well as build a relationship between this schema and the *Plan* schema.


Schemas > Customer Account Creation
Cancel
Save
Composition
Schema
Customer Account Creati...
Class
Assign
XDM Individual Profile
Field groups
Add
Customer Account Details
Consent and Preference D...
Personal Contact Details
Demographic Details
Identities
None
Relationships
None
Required fields
None
Deprecated fields
Structure
Customer Account Creation
_dxp | Object
Account | Object
createDate | Integer
endDate | DateTime
Plan | Object
planID | String
planName | String
customerID | String
_repo | Object
billingAddress | Billing Address
city | String
postalCode | String
state | String
street1 | String
Schema properties
Display name
Customer Account Creation
Description
This schema collects identities, plan information, etc.
Type
Schema
Profile
Created
07/19/2022, 12:37 PM
Last modified
08/08/2022, 1:28 PM


Composition
Schema
Customer Account Creati...
Class
Assign
XDM Individual Profile
Field groups
Add
Customer Account Details
Consent and Preference D...
Personal Contact Details
Demographic Details
Identities
None
Relationships
None
Required fields
None
Deprecated fields
Show deprecated fields
Structure
consents | Object
marketing | Marketing Preferences
email | Receive email
val | Choice Value
sms | Receive SMS
val | Choice Value
mobilePhone | Mobile Phone
number | String
person | Person
name | Full name
firstName | String
lastName | String
birthDayAndMonth | String
birthYear | Integer
personalEmail | Personal Email
address | String
shippingAddress | Shipping Address
city | String
Schema properties
Display name
Customer Account Creation
Description
This schema collects identities, plan information, etc.
Type
Schema
Profile
Created
07/19/2022, 12:37 PM
Last modified
08/08/2022, 1:28 PM


Identities
None
Relationships
None
Required fields
None
Deprecated fields
Show deprecated fields
postalCode | String
state | String
street1 | String
_id | String
createdByBatchID | String
modifiedByBatchID | String
personID | String
repositoryCreatedBy | String
repositoryLastModifiedBy | String
08/08/2022, 1:28 PM