



# Adobe Experience Platform Bootcamp Deep Dive Edition

DOCUMENTATION AND LABS





# **Customer Account Schema Design - UI LAB**

Adobe Experience Platform Bootcamp Deep Dive Edition

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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 field group
- Create enumerated fields

## LAB RESOURCES

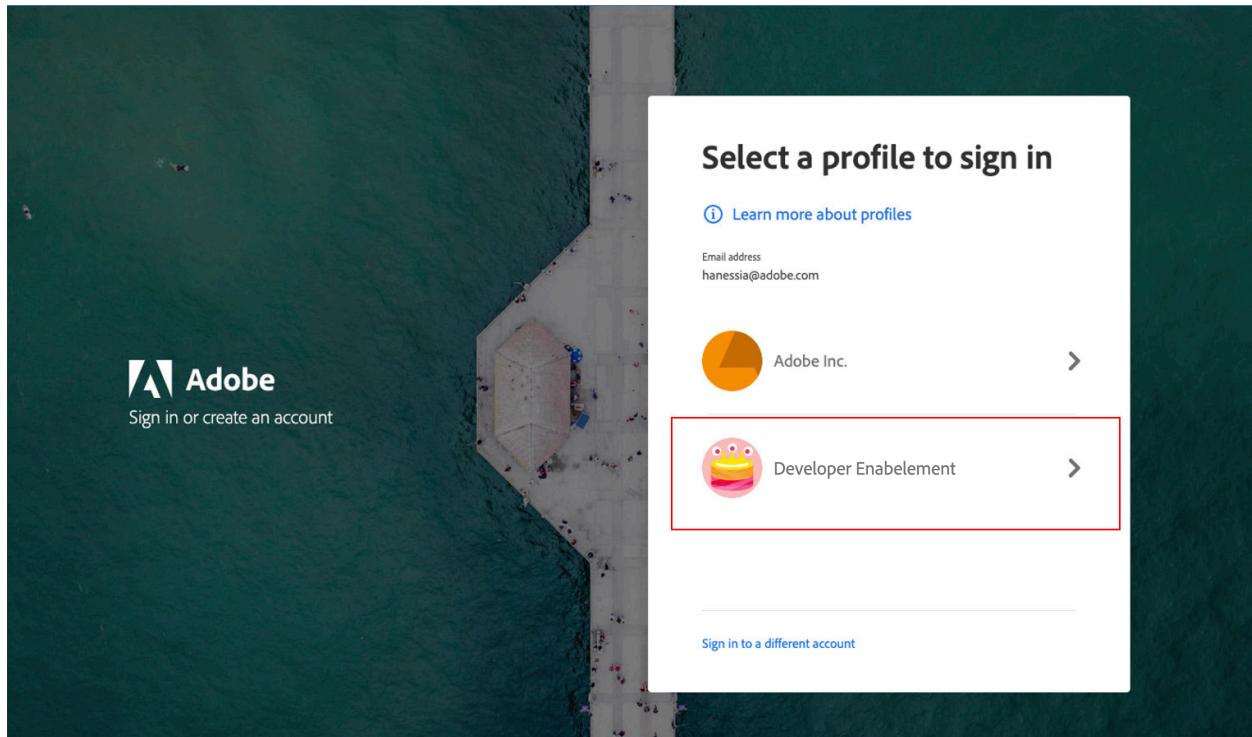
- Customer Account ERD
- Customer Account Mapping Sheet

## 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 Enablement* profile.



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

A screenshot of the Adobe Experience Platform Home screen. The left sidebar contains navigation links like Home, Workflows, Dashboards, Connections, Sources, Destinations, Customer, Profiles, Segments, Identities, Privacy, Policies, Requests, Audits, Data Science, Services, and Data Management. The main area displays "Welcome Rachel Hanessian" and statistics for Datasets (31), Profiles (58), and Segments (2). Below this are sections for Recent datasets (listing BR\_Namespace\_Destination, BR\_Segment\_Destination, DIM\_Destination, Profile Export For Destination - Merge Policy - bcb25d62-9f55-4aad-bd27-ac65..., and profile\_dim\_date) and Recent sources (listing Customer - Base Connect, Billing - Base connection to MFP API, XSC Team AWS S3 Storage v2, and XSC Team FTP Storage). On the far right, a dropdown menu titled "Developer Experience lab-009 (VAT)" is open, showing a list of sandboxes. The "lab-009 (VAT)" option is selected and highlighted with a red box. Other items in the list include Prod (VAT), Dev lab-001 (VAT), Dev lab-002 (VAT), Dev lab-003 (VAT), Dev lab-004 (VAT), Dev lab-005 (VAT), Dev lab-006 (VAT), Dev lab-007 (VAT), Dev lab-008 (VAT), Dev lab-010 (VAT), Dev lab-011 (VAT), Dev manik (VAT), and Dev rachel (VAT).

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

The screenshot shows the Adobe Experience Platform interface. On the left, there is a navigation sidebar with several sections: CUSTOMER (Profiles, Segments, Identities), PRIVACY (Policies, Requests, Audits), DATA SCIENCE (Services), DATA MANAGEMENT (Schemas, Datasets, Queries, Monitoring), DECISION MANAGEMENT (Offers, Components), and ADMINISTRATION. A red arrow points to the 'Schemas' link under 'DATA MANAGEMENT'. The main content area has a heading 'Welcome Rachel Hanessian' and a section titled 'Populate your Real-time Customer Profile by connecting to source data.' It includes a diagram illustrating the data flow from 'Sources' through 'Schemas' to 'Profiles', 'Segments', and 'Destinations'. Below this, there are two cards: 'Recommended learning' featuring a puzzle piece illustration and 'SOURCES' featuring a person interacting with a bar chart.

**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		

1. 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.

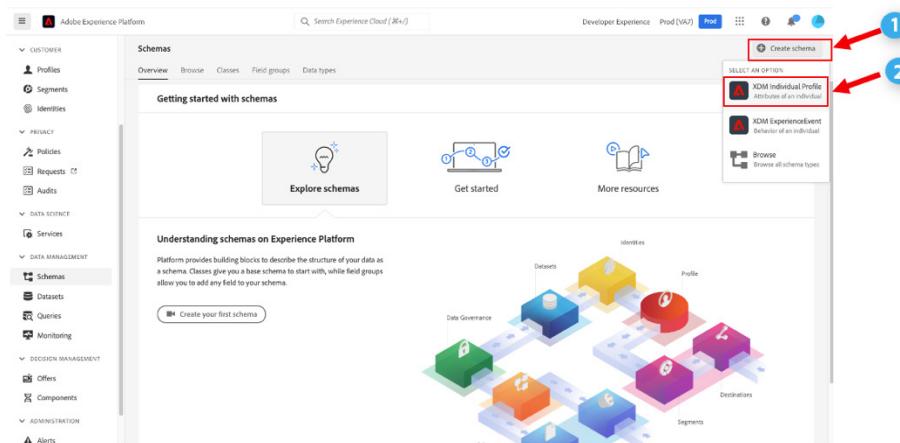
Schemas	
Overview	Browse
Classes	Field groups
Data types	
<input type="text"/> contact	x
NAME	OWNER
Personal Contact Details	Adobe
Work Contact Details	Adobe
Contact Request Details	Adobe

2. Browse the results by clicking the blue hyperlink.
3. 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



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

- 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.
- Give your schema a name and description** on the right rail
  - Display Name: *Customer Account - [your name]*
  - Description: This schema collects identities, plan information, demographic details, and contact details of an individual.

The screenshot shows the 'Schemas' interface in Adobe Experience Platform. On the left, the 'Composition' tab is selected, displaying the schema structure. The main area shows a tree view of fields under the root schema 'Customer Account - YourNameHere'. The 'Structure' tab is active, showing fields like '\_repo', '\_id', 'createdByBatchID', 'modifiedByBatchID', 'personID', 'repositoryCreatedBy', and 'repositoryLastModifiedBy'. The 'Schema properties' tab is also visible on the right, with a red box highlighting the 'Display name' and 'Description' sections. The 'Display name' is set to 'Customer Account - YourNameHere', and the 'Description' is set to 'This schema collects identities, plan information, demographic details, and contact details of an individual.' The 'Schema properties' tab also shows metadata like type (Schema), profile (None), and creation details (Created: 08/18/2022, Last modified: 08/18/2022).

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

## 4. ADD STANDARD FIELD GROUPS

1. 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.

The screenshot shows the 'Composition' and 'Structure' panels of the schema editor. In the 'Composition' panel, under 'Schema', there is a 'Customer Account - Your...' entry. Below it, under 'Field groups', there is an 'Add' button which is highlighted with a red box. In the 'Structure' panel, there is a tree view of the schema's object model, starting with an object named 'Customer Account - YourNameHere'. The tree includes fields such as '\_repo' (Object), '\_id' (String), 'createdByBatchID' (String), 'modifiedByBatchID' (String), 'personID' (String), 'repositoryCreatedBy' (String), and 'repositoryLastModifiedBy' (String).

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

The screenshot shows the 'Add field groups' modal. On the left, there is a sidebar with industry filters: Retail, Financial services, Travel and hospitality, and Telecommunications. A search bar at the top contains the text 'Demographic'. Below the search bar is a table with a single row for 'Demographic Details'. The row has a checkbox next to it, which is checked and highlighted with a red box. To the right of the table, there is a sidebar with the text '1 field group selected' and a table showing the details of the selected field group: NAME (Demographic Details), POPULARITY (403), INDUSTRIES (All), OWNER (Adobe), DESCRIPTION (Demographic information such as name, gender, and birth date of an individual.), and LAST MODIFIED (07/01/2022, 6:20 PM). At the top right of the modal, there is a 'Cancel' button and a blue 'Add field groups' button which is also highlighted with a red box.

- 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.

2. 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.

3. 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

4. **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:

The screenshot shows the Schema Editor interface for creating a new schema named "Customer Account - YourNameHere".

**Composition:**

- Schema:** Customer Account - YourNameHere (highlighted)
- Class:** XDM Individual Profile (with an "Assign" button)
- Field groups:** Consent and Preference Details, Personal Contact Details, Demographic Details (checkboxes)
- Identities:** None
- Relationships:** None

**Structure:**

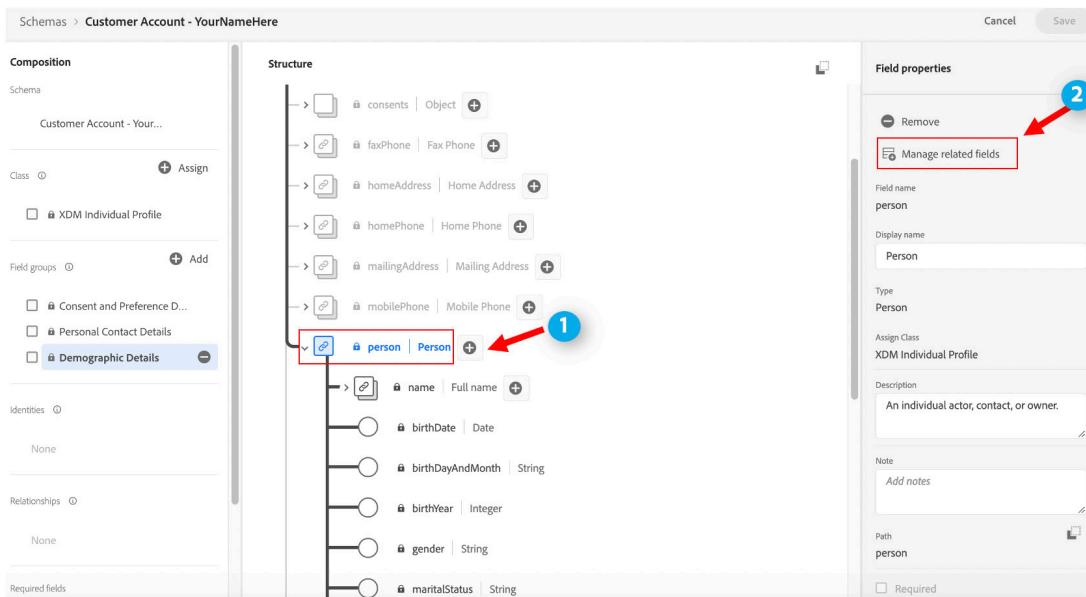
- Customer Account - YourNameHere (Object)
  - \_repo (Object)
  - billingAddress (Billing Address)
    - consents (Object)
    - faxPhone (Fax Phone)
    - homeAddress (Home Address)
    - homePhone (Home Phone)
    - mailingAddress (Mailing Address)
    - mobilePhone (Mobile Phone)
    - person (Person)

**Schema properties:**

- Display name:** Customer Account - YourNameHere
- Description:** This schema collects identities, plan information, demographic details, and
- Type:** Schema
- Profile:** None
- Created:** 08/16/2022, 9:24 AM
- Last modified:** 08/18/2022, 6:43 PM

## 5. CUSTOMIZE STANDARD FIELD GROUPS BY REMOVING FIELDS NOT NEEDED

- Demographic details field group brought in many fields, but based on your mapping 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 then re-select those you need!

- Select confirm on the top right once you are finished deselecting.
2. 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

3. 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.

4. **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:

The screenshot shows the 'Customer Account - YourNameHere' schema in the Schema Editor. The 'consents' field group is selected in the composition pane. The right-hand pane displays the 'Field properties' for 'consents', including the field name 'consents', display name 'Consents and Preferences', type 'Object', assign class 'XDM Individual Profile', and description 'Specific Consent and Preference Options'. The 'Path' is listed as 'consents'. The 'Structure' pane shows the schema's hierarchy, with 'consents' being an object under 'Customer Account - YourNameHere'.

5. 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.

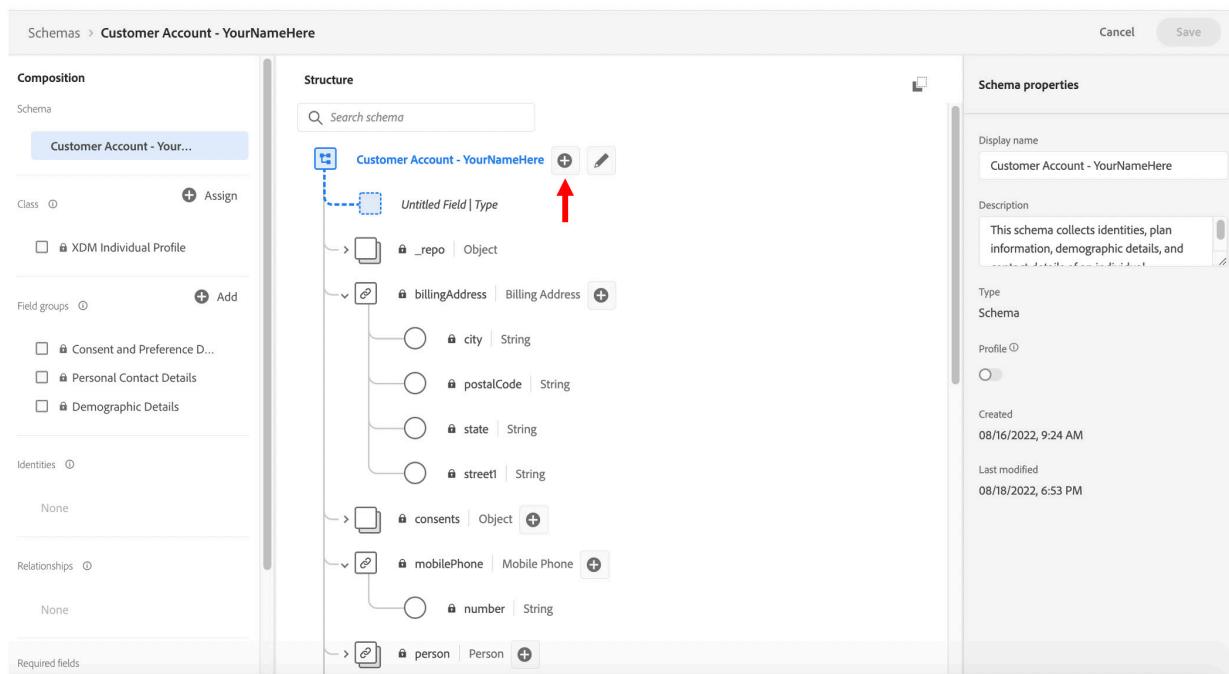
6. **Save & Validate.** When you are done with step 15, your *personal contact detail* field group should look like this (highlighted):

The screenshot shows the 'Customer Account - YourNameHere' schema in the Schema Editor. The 'billingAddress' field group is selected in the composition pane, and its properties are displayed in the right-hand field properties pane. The 'Path' is listed as 'billingAddress'. The 'Structure' pane shows the schema's hierarchy, with 'billingAddress' being an object under 'Customer Account - YourNameHere'.

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

- 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: `_dpx.account.createDate`, `_dpx.account.endDate`, `_dpx.account.acqSource` `_dpx.plan.planID`, `_dpx.plan.name` & `_dpx.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**.



The screenshot shows the Adobe Experience Platform Schema Editor interface. On the left, there are sections for Composition (Schema, Class, Field groups, Identities, Relationships), XDM Individual Profile, and Required fields. The main area is titled 'Structure' and shows the schema hierarchy. At the top of the structure tree, there is a blue button with a plus sign and a pencil icon. A red arrow points to this button. The right rail contains 'Schema properties' with fields for Display name (Customer Account - YourNameHere), Description (This schema collects identities, plan information, demographic details, and), Type (Schema), Profile (None), Created (08/16/2022, 9:24 AM), and Last modified (08/18/2022, 6:53 PM).

- Notice the right rail opens with some fields for you to enter. **Create an account object** by filling out

Field Name	Display Name	Type	Assign Field Group
account	Account	Object	<i>Customer Account Details - YourNameHere (you'll need to type this in and select the dropdown or hit enter)</i>

Field properties

**Remove**

Field name \*

Display name \*

Type \*

Object

Advanced type search

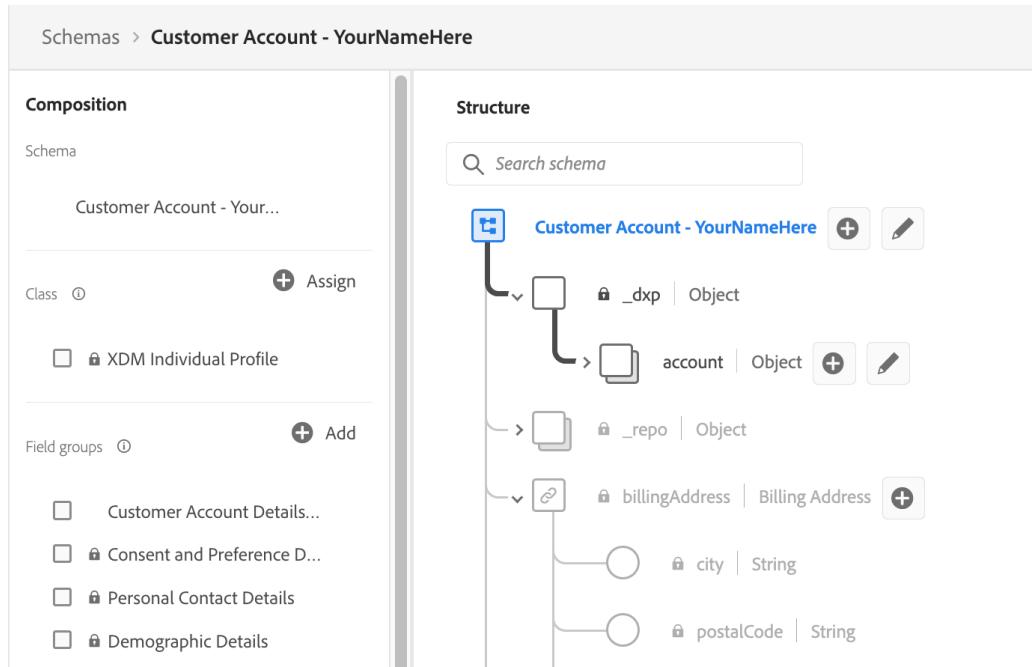
Assign field group \*

Customer Account Details - YourNameHere

Customer Account Details - YourNameHere (New)

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

Note	Your custom fields will fall under a tenant namespace, denoted by <code>_[_TenantName]</code> . Tenant namespaces are used to differentiate custom fields from adobe standards, and to avoid conflict. In this lab we are using <code>_dxp</code> as an example in the screenshots. However as your tenant name is automatically generated from the org you are in, it may not match with <code>_dxp</code> . This is correct and expected.
Note	Note your new custom field group that appears on the left rail under the field group section called <i>Customer Account Details - YourNameHere</i> . It appears without a lock icon to show it is custom.



- 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 `createDate` attribute

Field Name	Display Name	Type	Assign Field Group
<code>createDate</code>	<code>Create Date</code>	<code>dateTime</code>	<i>Customer Account Details-YourName Here</i>

**Note**

Notice field group has already been assigned to your custom field group because you are working within that field group's object.

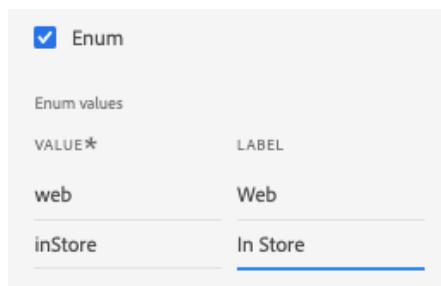
- Select **Apply** at the bottom to post your changes, and then **Save** your schema.
- Click plus sign besides account & fill meta data on right rail for `endDate`

Field Name	Display Name	Type	Assign Field Group
<code>endDate</code>	<code>End Date</code>	<code>dateTime</code>	<i>Customer Account Details-Your Name Here</i>

- Select **Apply** at the bottom to post your changes, and then **Save** your schema.
- Click plus sign besides account & fill meta data on right rail for `acqSource`

Field Name	Display Name	Type	Assign Field Group
<code>acqSource</code>	Acquired Source	<code>string</code>	<i>Customer Account Details-YourNameHere</i>

- 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, and then **Save** your schema.
- 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 - YourNameHere field group* 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	Display Name	Type	Assign Field Group
plan	Plan	Object	Customer Account Details - YourName Here

### Note

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.

The screenshot shows the 'Field properties' dialog box. It includes fields for 'Field name' (account), 'Display name' (Account), 'Type' (Object), and 'Assign field group'. The 'Assign field group' dropdown is open, showing 'Customer Account Details - YourNameHere' and 'Customer Account Details - YourNameHere (New)', with the latter being selected.

- Select **Apply** at the bottom to post your changes, and then **Save** your schema.

## 5. 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 *planID*

Field Name	Display Name	Type	Assign Field Group
planID	Plan ID	String	Customer Account Details - YourName Here

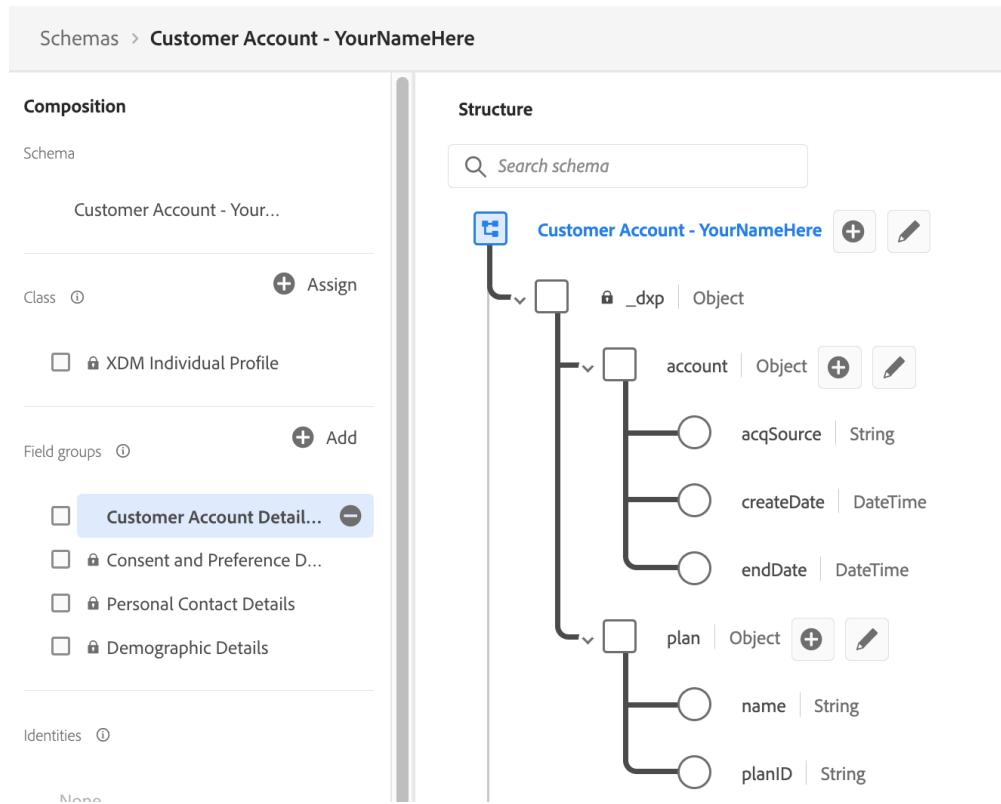
- Select **Apply** at the bottom to post your changes, and then **Save** your schema.

- Click plus sign besides *Plan* & Fill meta data on right rail for *Name*

Field Name	Display Name	Type	Assign Field Group
name	Name	String	Customer Account Details - YourNameHere

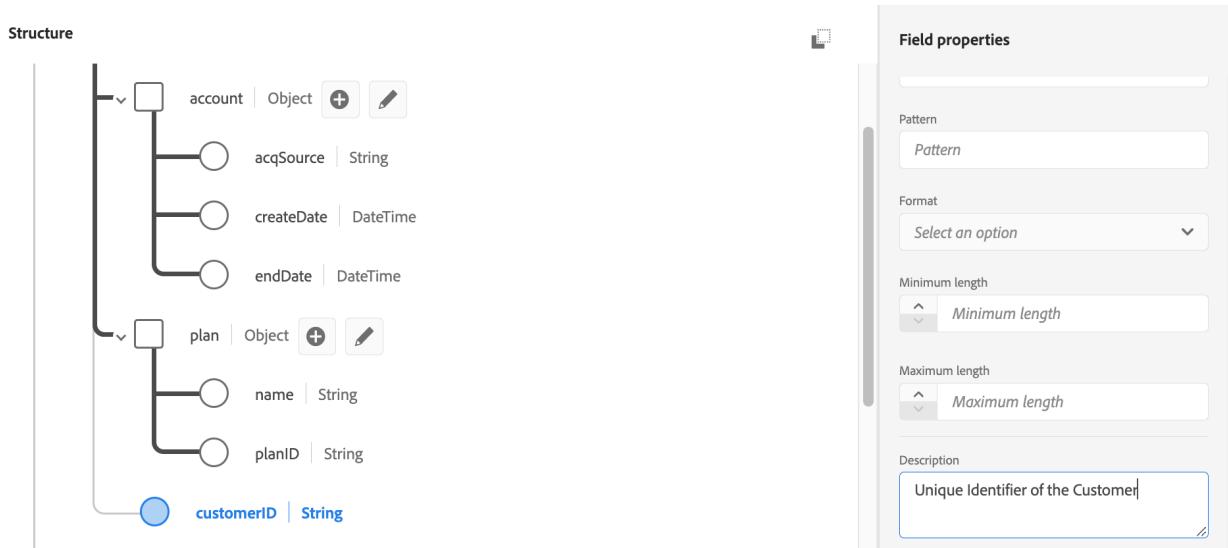
- Select **Enum** checkbox to add validation for this field at ingestion, as well as suggestion list for segmentation Add enum values *basic;Basic,ultimate;Ultimate,pro;Pro*
- Select **Apply** at the bottom to post your changes

6. **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:



7. 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 - YourNameHere field group.
- Click the plus at the root of your schema

Field Name	Display Name	Type	Assign Field Group	Description
CustomerID	Customer ID	String	Customer Account Details	Unique Identifier for the customer profile



- Select Apply at the bottom to post your changes. Save your schema.

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.

The screenshot displays two separate schema configurations in the Adobe Experience Platform Schema Editor:

**Customer Schema:**

- Composition:**
  - Schema: Customer Schema
  - Class: XDM Individual Profile (selected)
  - Field groups: Customer Account, Personal Contact Details, Demographic Details (XDM Individual Profile)
  - Identities: None
  - Relationships: None
  - Required fields: None
  - Ddeprecated fields: Show deprecated fields
- Structure:**
  - Customer Schema (Object)
    - Account (Object)
      - acqSource (String)
      - createDate (DateTime)
      - endDate (DateTime)
    - Plan (Object)
      - planID (String)
      - planeName (String)
  - \_repo (Object)
    - billingAddress (Billing Address)
      - city (String)
      - postalCode (String)
      - state (String)
      - street1 (String)
- Field properties:**
  - Remove
  - Manage related fields
  - Field name: billingAddress
  - Display name: Billing Address
  - Type: Postal address
  - Assign Class: XDM Individual Profile
  - Description: Billing postal address.
  - Note: Add notes
  - Path: billingAddress
  - Required: Required

**Customer Account Creation:**

- Composition:**
  - Schema: Customer Account Creation (selected)
  - Class: XDM Individual Profile
  - Field groups: Customer Account Details, Consent and Preference D..., Personal Contact Details, Demographic Details
  - Identities: None
  - Relationships: None
  - Required fields: None
  - Ddeprecated 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: (radio button)
  - Created: 07/19/2022, 12:37 PM
  - Last modified: 08/08/2022, 1:28 PM

Identities 

None

---

Relationships 

None

---

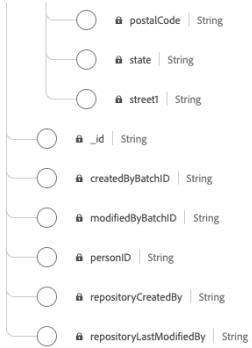
Required fields

None

---

Deprecated fields

Show deprecated fields



08/08/2022, 1:28 PM



# **Adobe Experience Platform Schema Design Identities, Relationships & Union Profile View**

Adobe Experience Platform Bootcamp Deep Dive Edition

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## LAB OVERVIEW

Learn how to set an identity & a primary identity so that you can build relationships between a profile and a lookup schema. Enable schemas for profile to inspect the union schema view

## LEARNING OBJECTIVES

What should you walk away with after taking this Lab?

- Declare an identity
- Declare a primary identity
- Build a relationship between two schemas
- Enable a schema for profile & inspect union schema view

# 1. DECLARE AN IDENTITY & A PRIMARY IDENTITY

You completed the creation of the Customer Account Schema in the UI schema lab. To complete schema config, you must mark the identities that you determined during the "I" step of the SID lab, and build a relationship. Finally, you must enable the schema for profile.

**Mark the Personal Email Address Field as an identity.**

1. Open your customer account schema
2. Select the personalEmail.address field
3. Mark the identity checkbox on the right rail
4. Select the Email identity namespace from the dropdown.

The screenshot shows the UI schema editor interface. On the left, there is a tree view of fields under a schema named 'Customer Account'. One of the fields is 'personalEmail' of type 'Personal Email'. On the right, there is a configuration panel for this field. It has sections for 'Required' (unchecked), 'Identity' (checked), 'Primary identity' (unchecked), 'Identity namespace' (set to 'Email'), and 'Relationship' (unchecked). At the bottom is a blue 'Apply' button.

5. Apply & Save your changes. Validate that a thumbprint shows on your field.

**Mark the customer ID Field as a primary identity.**

6. Select the \_dpx.customerID field.
7. Mark it as identity and primary identity using the checkboxes on the right rail
8. Select the customerId namespace from the dropdown.

The screenshot shows the UI schema editor interface. On the left, there is a tree view of fields under a schema named 'Customer Account Creation'. One of the fields is '\_dpx' of type 'Object', which contains 'Account' and 'Plan' objects, and a 'customerId' field of type 'String'. On the right, there is a configuration panel for the 'customerId' field. It has sections for 'Enum' (unchecked), 'Identity' (checked), 'Primary identity' (checked), 'Identity namespace' (set to 'customerId'), and 'Relationship' (unchecked). At the bottom is a blue 'Apply' button.

9. Apply & Save your changes. Validate that a thumbprint shows on your field.

You have completed the assignment of identities on your Customer Account Schema.

## 2. BUILD RELATIONSHIPS BETWEEN TWO SCHEMAS

Build a relationship between your Customer Account Schema and the Plan schema.

1. **Select** the PlanID field on the Customer Account - YourNameHere
2. **Check** the relationship checkbox on the right rail
3. **Select** the reference schema: dep: Lookup Plan

**Structure**

The screenshot shows the AEM schema structure editor. On the left, the schema tree is visible with nodes like 'Customer Account - YourNameHere', '\_dpx', 'account', 'plan', 'name', 'planID', 'customerID', '\_repo', 'billingAddress', and 'consents'. The 'planID' field is currently selected, indicated by a blue circle. On the right, the 'Field properties' panel is open for the '\_dpx.plan.planID' field. It includes fields for 'Required', 'Array', 'Enum', 'Identity', and a checked 'Relationship' checkbox. Below that, a dropdown menu shows 'dep: Lookup Plan' selected under 'Reference schema'. A note at the bottom right says 'Apply'.

**Note**

When building a relationship, you don't need to specify the destination property. The primary identity on the destination schema will be used.

4. **Select** Apply & Save. Validate you see the relationship between planID and the dep: Lookup Plan Schema



### 3. ENABLE A SCHEMA FOR PROFILE

Real-time Customer Profile merges data from disparate sources to construct a complete view of each individual customer. If you want the data captured by a schema to participate in this process, you must enable the schema for use in Profile.

1. Open your Customer Account schema.
2. Enable your schema for profile by toggling on the profile toggle on the right rail, and selecting enable

The screenshot shows the 'Customer Account - YourNameHere' schema structure. The left pane displays the schema's composition, including fields like '\_dxp', 'account', 'plan', 'name', 'planID', 'customerID', '\_repo', and 'billingAddress'. The right pane shows the 'Schema properties' panel with fields for 'Display name' (Customer Account - YourNameHere), 'Description' (This schema collects identities, plan information, demographic details, and), 'Type' (Schema), and 'Profile' (disabled). A red box highlights the 'Profile' toggle switch.

The screenshot shows the 'Enable for Profile' dialog box. The dialog contains the message: 'Are you sure you want to enable this schema for Profile? Once enabled and saved, the schema can't be disabled.' Below the message are 'Cancel' and 'Enable' buttons. In the background, the schema's structure and properties are visible, including the 'Profile' toggle which is now turned on (indicated by a green circle).

3. Save your schema

## 4. INSPECT YOUR UNION SCHEMA VIEW

1. Navigate to **Profiles** on the left navigator
2. Select the **Union Schema** tab on the top menu
3. Select your individual profile class

The screenshot shows the 'Profiles' section of the platform. On the left, there's a navigation sidebar with various categories like Home, Workflows, Dashboards, CONNECTIONS, Sources, Destinations, CUSTOMER (with Profiles highlighted), Segments, Identities, PRIVACY, Policies, Requests, Audits, DATA SCIENCE, Services, DATA MANAGEMENT, and Schemas. A red arrow labeled '1' points to the 'Profiles' item in the CUSTOMER section. At the top right, there are tabs: Overview, Browse, Merge Policies, and Union Schema (which is underlined and has a red arrow labeled '2' pointing to it). Below the tabs, there's a search bar labeled 'Search schema'. A dropdown menu titled 'Class' is open, showing several options: XDM Individual Profile (selected, indicated by a blue circle with '3'), Product, XDM Individual Profile (with a checkedmark), Plan, Lookup Store Class, XDM ExperienceEvent, and Segment definition. This dropdown is also enclosed in a red box. To the right of the dropdown, a tree view shows the schema structure: XDM Individual Profile branches into \_dpx (Object), \_experience (Object), \_repo (Object), billingAddress (Object), consents (Object), directMarketingAddress (Object), directMarketingEmail (Object), directMarketingPhone (Object), and extSourceSystemAudit (Object).

4. Notice the schema shown is an aggregate merged view of all profile schemas in your sandbox. Some auto provisioned AJO schemas are included.
5. Browse Unions of different classes to see the union for Experience Event and Specific Lookup classes.