



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

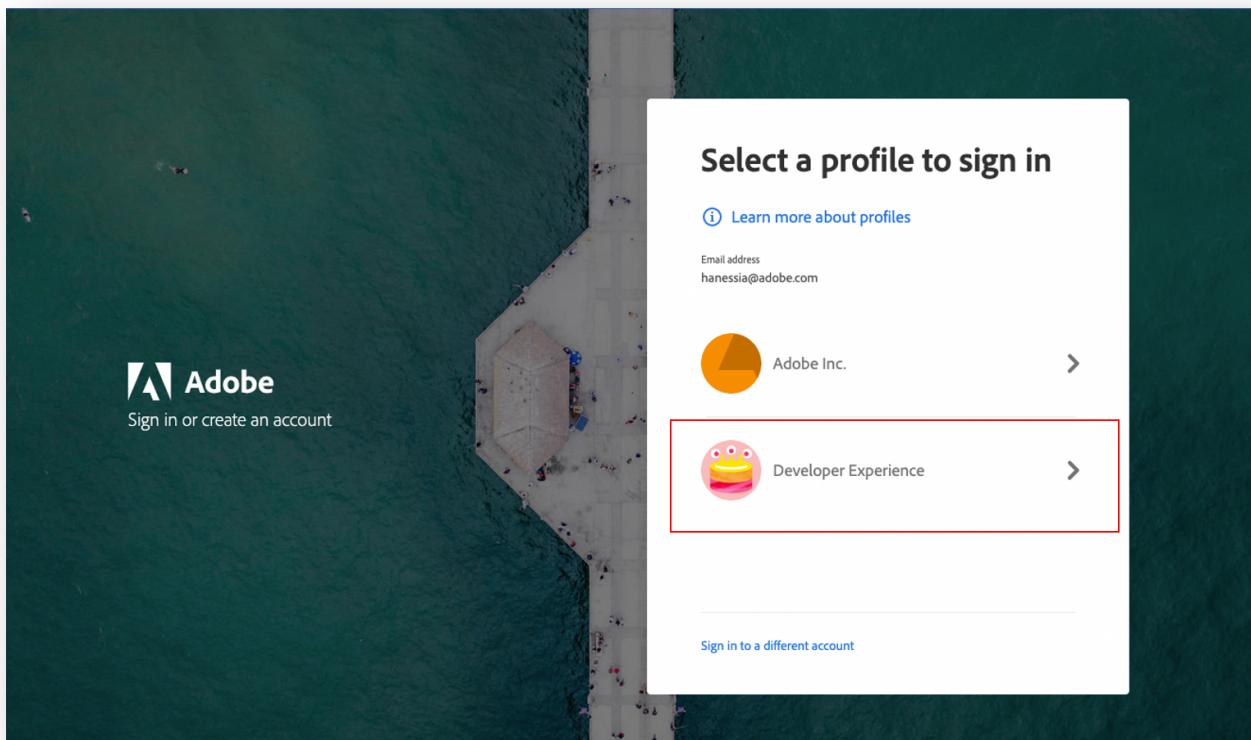
- [Customer Account ERD](#)
- [Customer Account Mapping Sheet](#)

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.

The screenshot shows the Adobe Experience Platform developer experience dashboard. On the left, there's a sidebar with various navigation options 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' with metrics for Datasets (31), Profiles (58), and Segments (2). Below these are sections for Recent datasets and Recent sources. The 'Recent sources' section is highlighted with a red box, showing a list of sandboxes: Prod (VAT), lab-001 (VAT), lab-002 (VAT), lab-003 (VAT), lab-004 (VAT), lab-005 (VAT), lab-006 (VAT), lab-007 (VAT), lab-008 (VAT), lab-009 (VAT) (which is checked), lab-010 (VAT), lab-011 (VAT), manik (VAT), and rachel (VAT). At the bottom right of the dashboard, there are 'View all' buttons.

- 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 with the 'Schemas' tab selected in the left rail. The main area displays a welcome message and a diagram illustrating the data flow from Sources to Profiles, Segments, and Destinations. Below this, there's a 'Recommended learning' section with two cards: 'SCHEMAS' (showing a person assembling puzzle pieces) and 'SOURCES' (showing 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		

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.

The screenshot shows a search interface for 'Field groups'. A search bar at the top contains the text 'contact'. Below the search bar is a table with two columns: 'NAME' and 'OWNER'. Three items are listed:

NAME	OWNER
Personal Contact Details	Adobe
Work Contact Details	Adobe
Contact Request Details	Adobe

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.

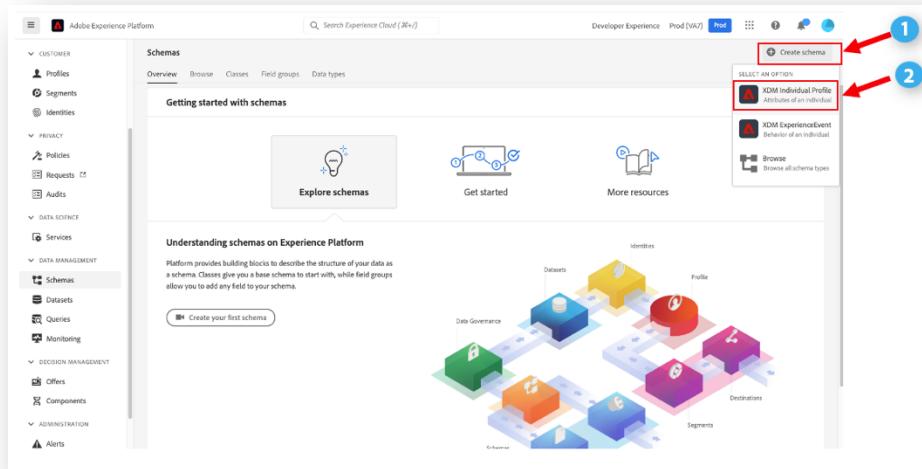
The screenshot shows the detailed configuration for the 'personalEmail' field group. On the left, there is a tree view of fields under 'personalEmail | Personal Email': address (String), label (String), primary (Boolean), status (String), statusReason (String), and type (String). The 'address' field is highlighted with a blue circle. On the right, there is a properties panel with sections for 'Maximum length', 'Description' (which includes a note about RFC2822), 'Note', and 'Path'. The 'Path' field contains the value 'personalEmail.address' and is highlighted with a red box. There is also a checkbox for 'Required' which is unchecked.

Note

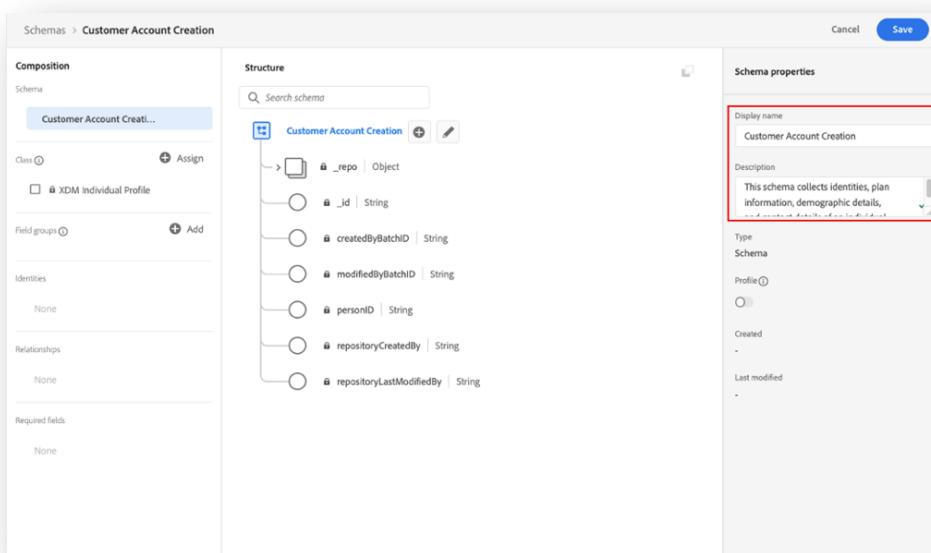
You can use partial field groups, so just write in the attribute paths you need from the field group you identified.

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.

Schemas > Customer Account Creation

Composition

Schema

Customer Account Creat...

Class Assign

XDM Individual Profile

Field groups **+ Add**

Identities

None

Relationships

None

Structure

Customer Account Creation

- _repo | Object
- _id | String
- createdByBatchID | String
- modifiedByBatchID | String
- personID | String
- repositoryCreatedBy | String
- repositoryLastModifiedBy | String

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

Add field groups

Use existing field groups Create new field group

Cancel **Add field groups**

NAME	POPULARITY	INDUSTRIES	OWNER	DESCRIPTION	LAST MODIFIED
Demographic Details	403	All	Adobe	Demographic information such as name, gender, and birth date of an individual.	07/01/2022, 6:20 PM

1 field group selected

- **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

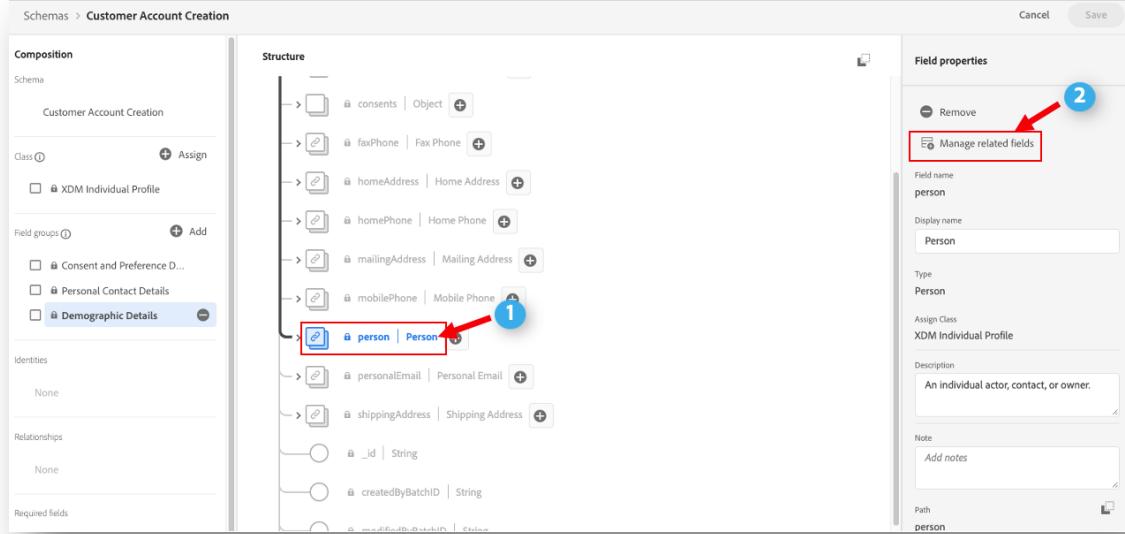
13. **Save** your schema & **validate** that your schema looks like the below with three field groups on the left, and demographic and contact related objects in the tree structure:

The screenshot shows the 'Customer Account Creation' schema structure. The left sidebar lists schema composition details: Class (XDM Individual Profile), Field groups (Consent and Preference D..., Personal Contact Details, Demographic Details), Identities (None), Relationships (None), and Required fields (None). The main 'Structure' pane displays a tree of objects. At the top level is '_repo'. Below it are 'Customer Account Creation' (Object), 'consents' (Object), 'faxPhone' (Fax Phone), 'homeAddress' (Home Address), 'homePhone' (Home Phone), 'mailingAddress' (Mailing Address), 'mobilePhone' (Mobile Phone), 'person' (Person), 'personalEmail' (Personal Email), and 'shippingAddress' (Shipping Address). Each object node has a lock icon and a plus sign for adding more. The right sidebar contains 'Schema properties' with fields for Display name (Customer Account Creation), Description (This schema collects identities, plan information, demographic details, and), Type (Schema), Profile (None), Created (07/13/2022, 2:25 PM), and Last modified (07/13/2022, 2:25 PM). Buttons for 'Cancel' and 'Save' are at the top right.

5. CUSTOMIZE STANDARD FIELD GROUPS BY REMOVING FIELDS NOT NEEDED

14. 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 the reselect those you need!

Manage related fields

Structure

Search schema

Demographic Details

- person | Person
 - name | Full name
 - courtesyTitle | String
 - firstName | String
 - fullName | String
 - lastName | String
 - middleName | String
 - suffix | String
 - birthDate | Date
 - birthDayAndMonth | String
 - birthYear | Integer
 - gender | String

Schema properties

Display name: Demographic Details
Description: Demographic information such as name, gender, and birth date of an individual.
Type: Field group
Created: 07/01/2022, 6:20 PM
Last modified: 07/01/2022, 6:20 PM

Close Confirm

- 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

Schemas > Customer Account Creation

Composition

Schema: Customer Account Creation

Class: XDM Individual Profile

Field groups: Consent and Preference D... Personal Contact Details Demographic Details

Identities: None

Relationships: None

Structure

- mailingAddress | Mailing Address
- mobilePhone | Mobile Phone
- person | Person
 - name | Full name
 - firstName | String
 - lastName | String
 - birthDayAndMonth | String
 - birthYear | Integer
- personalEmail | Personal Email
- shippingAddress | Shipping Address
- _id | String

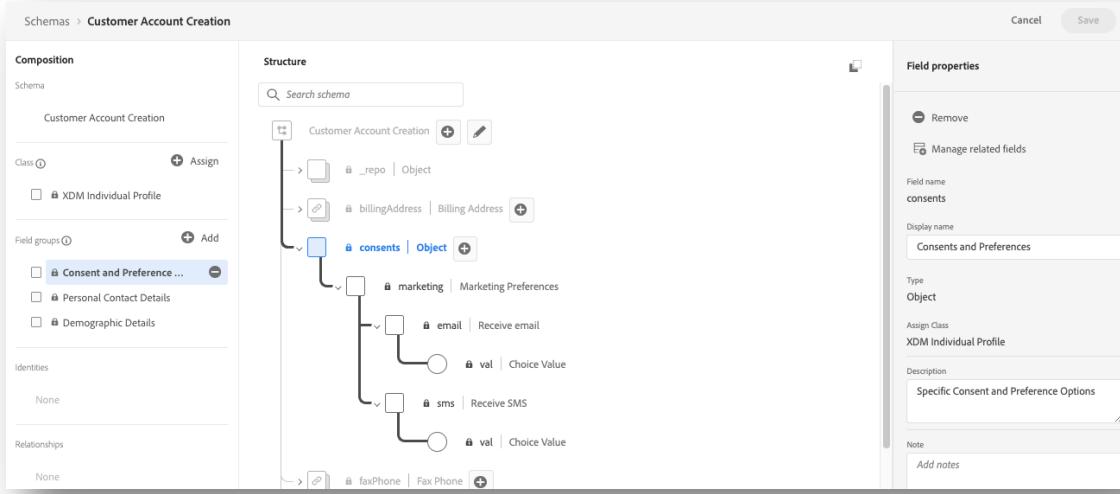
Field properties

Field name: person
Display name: Person
Type: Person
Assign Class: XDM Individual Profile
Description: An individual actor, contact, or owner.
Note: Add notes

Cancel Save

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):

The screenshot shows the 'Customer Account Creation' schema structure. On the left, the 'Composition' panel lists the schema, class (XDM Individual Profile), field groups (Consent and Preference D..., Personal Contact Details, Demographic Details), identities (None), relationships (None), required fields (None), and deprecated fields (Show deprecated fields). The 'Field groups' section highlights the 'Personal Contact Details' group. The central 'Structure' panel displays the schema's components: billingAddress (Billing Address), mobilePhone (Mobile Phone), personalEmail (Personal Email), and shippingAddress (Shipping Address), each with its respective sub-fields (city, postalCode, state, street1) and type (String). A bottom-level field '_id' (String) is also shown. On the right, the 'Field properties' panel is open for the 'faxPhone' field, showing its properties: Field name (faxPhone), Display name (Fax Phone), Type (Phone number), Description (Fax phone number), Note (Add notes), Path (faxPhone), and Required (checkbox). The 'Apply' button is visible at the bottom of the properties panel.

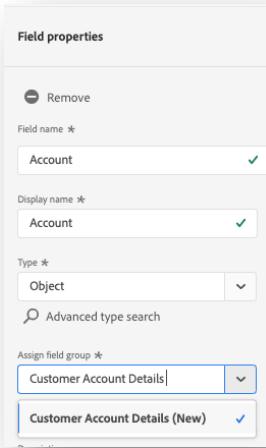
You are now finished with adding standard components to your schema. Great job! Let's move on to building some custom attributes for your schema.

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: `_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 AEM Schema Editor interface for the 'Customer Account Creation' schema. The left sidebar contains sections for Composition (Schema, Class, Field groups, Identities, Relationships, Required fields, Deprecated fields), and a 'Show deprecated fields' checkbox. The main area is divided into 'Structure' and 'Field properties'. The 'Structure' panel shows a tree view of the schema, starting with 'Customer Account Creation' which has an 'Untitled Field | Type' node. The 'Field properties' panel on the right is open, showing fields for 'Field name', 'Display name', 'Type', 'Assign field group', 'Description', 'Note', and checkboxes for 'Required' and 'Array'. A red arrow points to the blue '+' icon located at the top right of the 'Structure' panel.

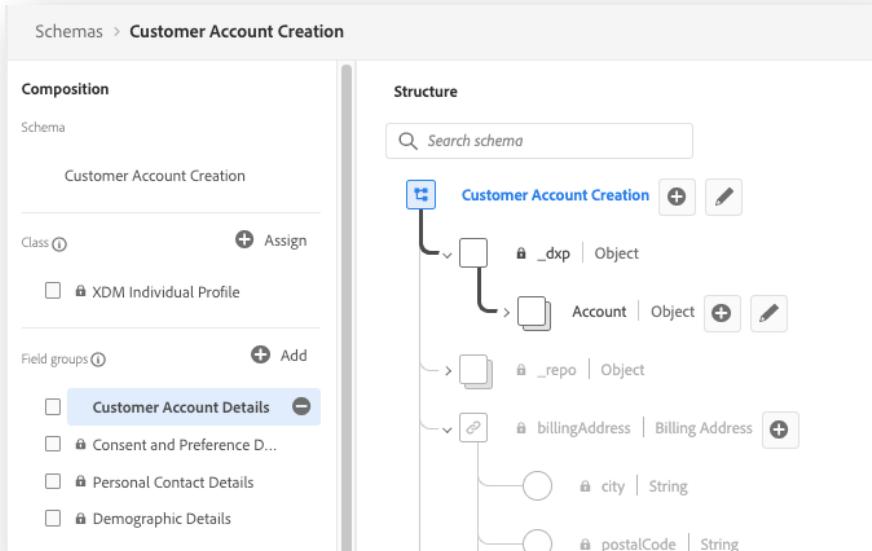
21. Notice the right rail opens with some fields for you to enter. **Create an account object** by filling out
- Field name: *account*
 - Display Name: *account*
 - Type: *Object*
 - Assign Field Group: *Customer Account Details*



- 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*

VALUE*	LABEL
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.

Field properties

Remove

Field name *

Display name *

Type *

Advanced type search

Assign field group *

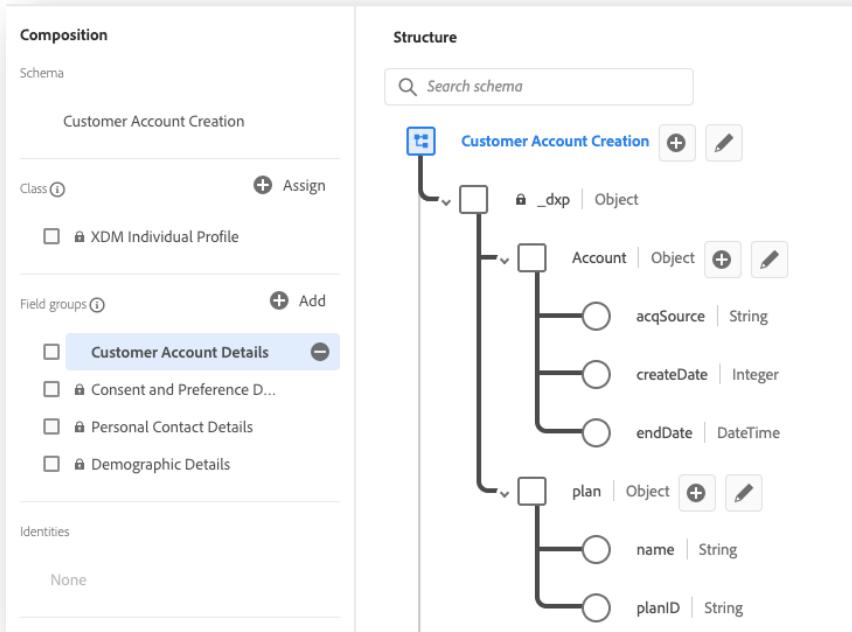
Customer Account Details

- 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 *planID*
 - 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*

The screenshot shows the Data Platform schema editor interface. On the left, the 'Structure' tab displays a hierarchical tree of fields under a schema named 'Customer Account Creation'. Key fields include 'customerID', 'Account' (with sub-fields 'createDate' and 'endDate'), 'Plan' (with sub-fields 'planID' and 'planName'), and various address and phone fields like 'billingAddress', 'consents', 'faxPhone', 'homeAddress', and 'homePhone'. On the right, the 'Field properties' tab is open for the 'customerID' field. It shows the field's type as 'String', its display name as 'Customer ID', and its assigned field group as 'Customer Account Details'. A detailed description for the field is provided: '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.

