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Profile lookup with Adobe Experience Platform

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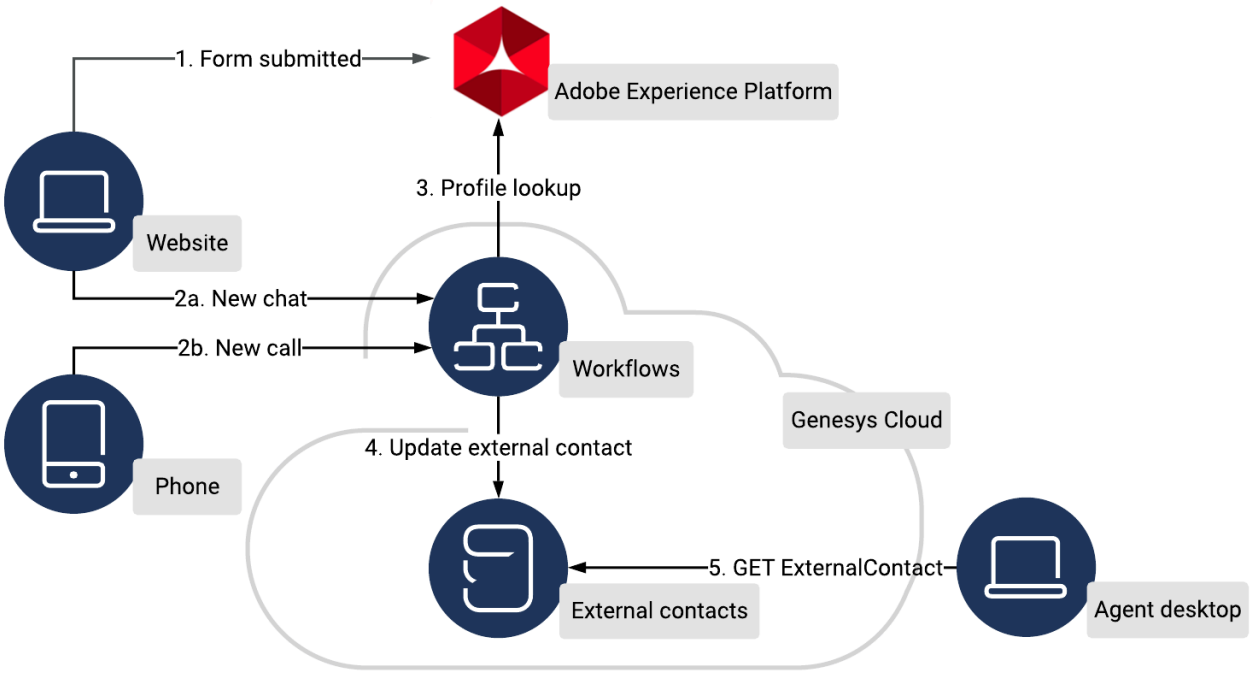
Learn how to look up a customer's profile in Adobe Experience Platform so that you can display richer contextual data to agents.

Prerequisites

- **Configure the following permissions in Genesys Cloud CX:**
  - **Architect > Flow > All**
  - **Architect > UI > All**
  - **Externalcontacts** > **Contact** > **All**
  - **Integrations > Integration > All**
  - **Integrations > Action > All**

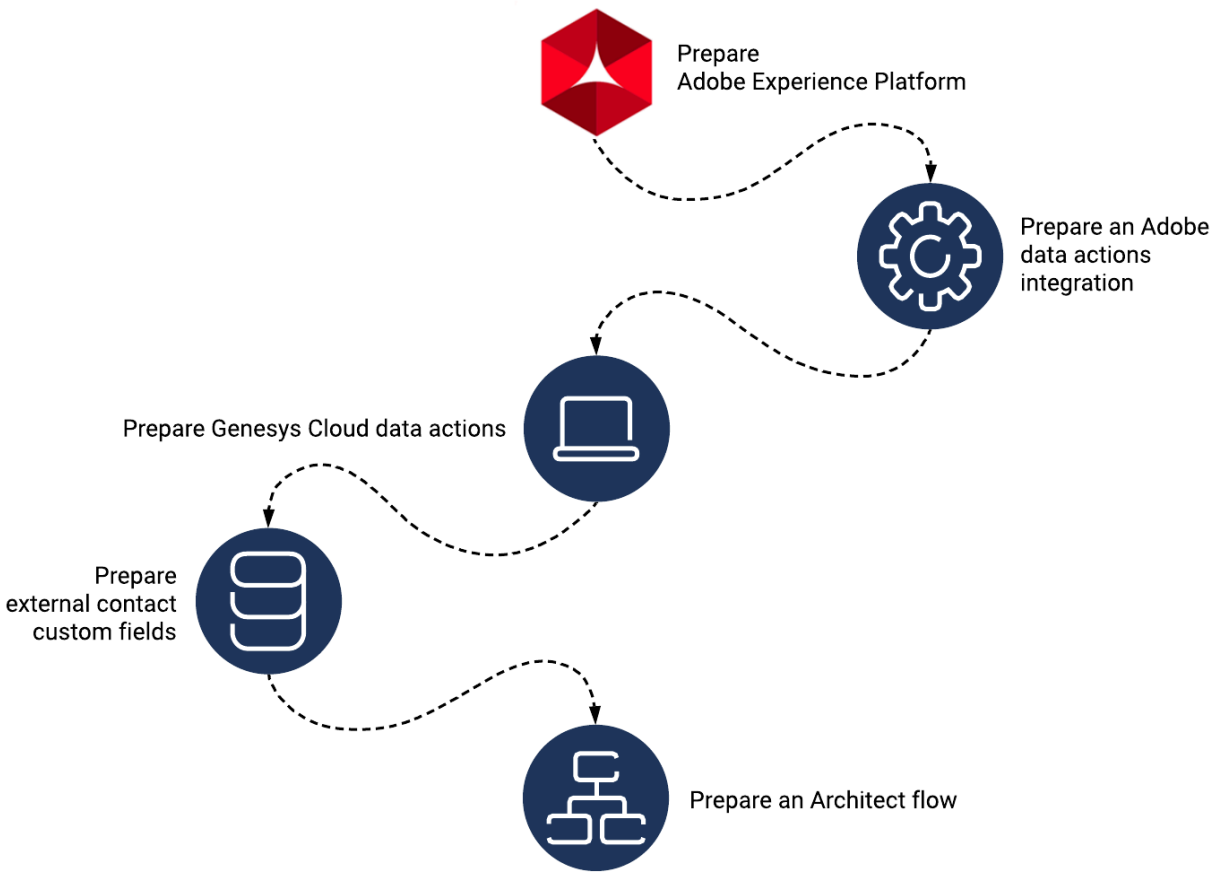
Overview



Adobe Experience Platform contains a rich set of customer data. You can build an integration to Adobe to retrieve this customer data and present it to agents as they begin to speak with a customer. If Adobe does not have a record of the

customer, you can configure the integration to create the new record and populate it with data that the agent captures.

Configuration overview



To build the integration, complete the following steps:

1. Prepare the Adobe Experience Platform.
2. Prepare an Adobe data actions integration.
3. Prepare Genesys Cloud CX data actions.
4. Prepare external contact custom fields.
5. Prepare an Architect flow.

Prepare the Adobe Experience Platform

For more information about configuring Adobe Experience Platform, see https://console.adobe.io/home.

To prepare Adobe Experience Platform for integration with Genesys Cloud CX:

1. Create the schemas that define what data to store on the customer profile.
2. Create a user account to interact with the Adobe API.

Prepare an Adobe data actions integration

For more information, see About Adobe data actions integration.

To prepare a Genesys Cloud CX integration for use with Adobe Experience Platform:

1. In the App Foundry, get the Adobe data actions integration.
2. Install the Adobe data actions integration.
3. Configure the integration with the settings from your Adobe project.
4. Publish the integration.

Prepare Genesys Cloud CX data actions

For more information about configuring data actions, see About custom actions for integrations.

To prepare data actions for use with the integration to Adobe Experience Platform:

1. Create the necessary data actions. Depending on your business goals, it could include data actions to read and update profile information.
2. Associate the data actions with your integration.
3. Configure the data actions to create and update Adobe profile information based on the external contacts custom fields. The specific configuration options for the data action are specific to the data action itself.
4. Save and publish your data actions.

Prepare external contact custom fields

For more information about preparing external contact custom fields, see:

- Customize external contacts and organizations

- Custom field types

To prepare the custom fields for use with the integration to Adobe Experience Platform:

- Configure the custom data types on the external contact to include the fields to store on the external contacts in Adobe.

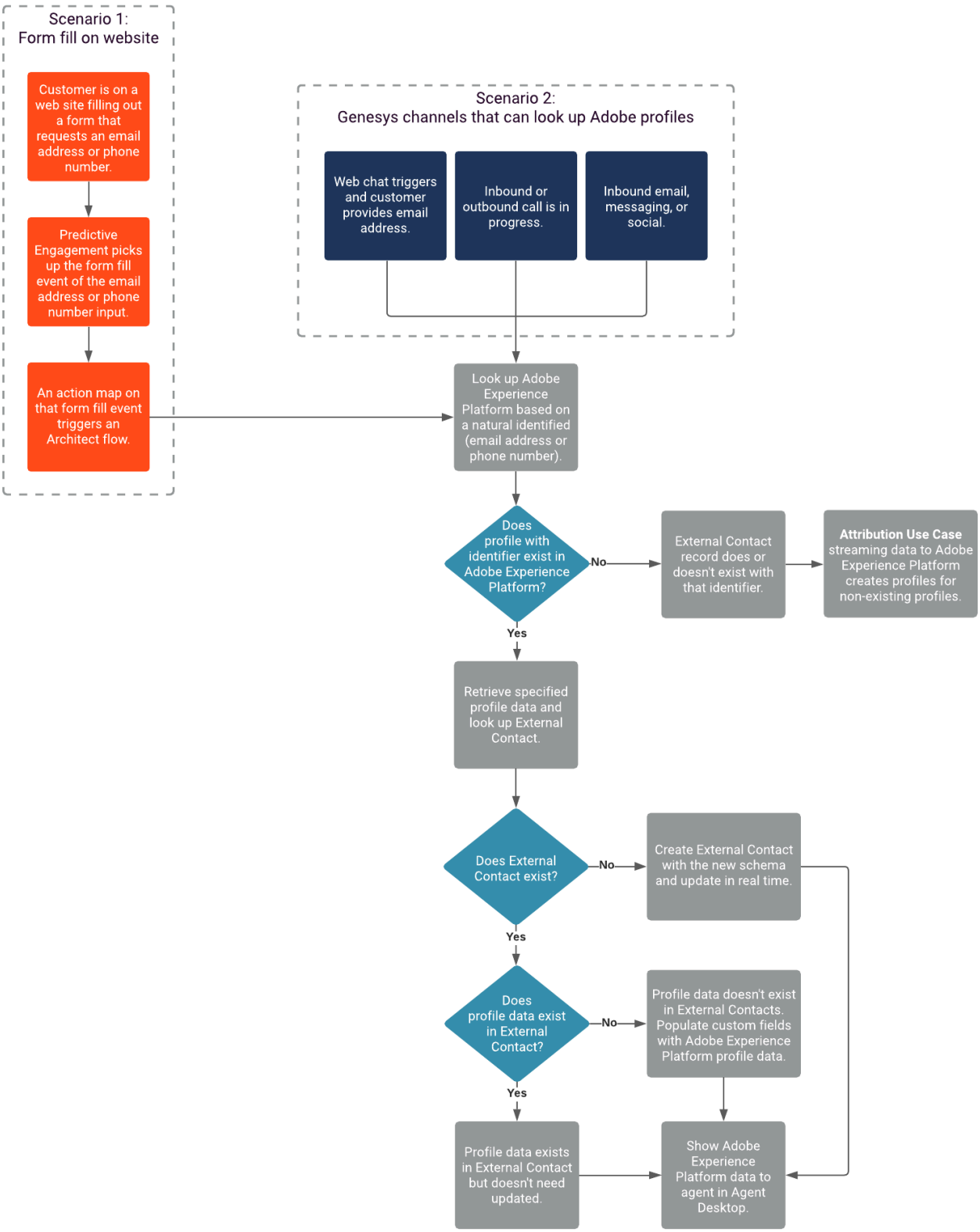
Prepare the Architect flow

For more information about building inbound flows in Architect, see Inbound chat flows overview. For more information about using Architect flows in a secure and compliant manner, see Create a flow.

To prepare an Architect workflow for use with the integration to Adobe Experience Platform:

1. Create an Inbound chat flow.
2. Identify the data schema to send to Genesys cloud.
3. Configure the Architect flow to point to the correct data actions.
4. Update the Architect flow to refer to the external contact data actions.
5. Save and publish the workflow.
6. Prepare the queue and widget to work with this flow.

Adobe Experience Platform to Genesys Cloud CX scenarios


Scenario 1:
Form fill on website
Customer is on a web site filling out a form that requests an email address or phone number.
Predictive Engagement picks up the form fill event of the email address or phone number input.
An action map on that form fill event triggers an Architect flow.
Scenario 2:
Genesys channels that can look up Adobe profiles
Web chat triggers and customer provides email address.
Inbound or outbound call is in progress.
Inbound email, messaging, or social.
Look up Adobe Experience Platform based on a natural identified (email address or phone number).
Does profile with identifier exist in Adobe Experience Platform?
No
External Contact record does or doesn't exist with that identifier.
Attribution Use Case streaming data to Adobe Experience Platform creates profiles for non-existing profiles.
Yes
Retrieve specified profile data and look up External Contact.
Does External Contact exist?
No
Create External Contact with the new schema and update in real time.
Yes
Does profile data exist in External Contact?
No
Profile data doesn't exist in External Contacts. Populate custom fields with Adobe Experience Platform profile data.
Yes
Profile data exists in External Contact but doesn't need updated.
Show Adobe Experience Platform data to agent in Agent Desktop.

Banking scenario example

You can use the following templates for your own particular domain but you have to modify them to match your schema.

Template	Template Type	Description
AdobeBankingProfileLookup.i3InboundChatFlow	Architect flow	Retrieves a profile from Adobe based on email address, and updates or creates an external contact based on the Adobe profile information.
Adobe-LookupBankingLeadByEmail.json	Data action	Retrieves the Adobe profile and other customer domain-specific fields from Adobe based on email address. Add the data actions to an Adobe data actions integration type.
External-Contact---create-contact-with-banking-fields.custom.json	Data action	Creates an external contact in Genesys Cloud CX based on the attributes passed to it. Add the data actions to a Genesys Cloud CX data actions integration type.
External-Contact---update-contact-with-banking-fields.custom.json	Data action	Updates an external contact in Genesys Cloud CX based on the attributes passed to it. Add the data actions to a Genesys Cloud CX data actions integration type.
External-Contacts-Contact-lookup-v2.custom.json	Data action	Searches Genesys Cloud CX for an external contact with the specified email address. Add the data actions to a Genesys Cloud CX data actions integration type.

Data definitions

The intent of providing the following files is so that you can compare what you have to the example and determine whether there is a similar field in the example.

- externalContact-BankingCustomer.json: Definition of the external contact in the Genesys system, tailored to match the banking domain in this example. It contains custom fields which the create and update contact data actions refer to. If there is a mismatch, the data actions won't function as intended.
- adobe-bancodineroschema.json: Definition of the shape of the data in the Adobe system. It shows the definition of the banking specific fields.