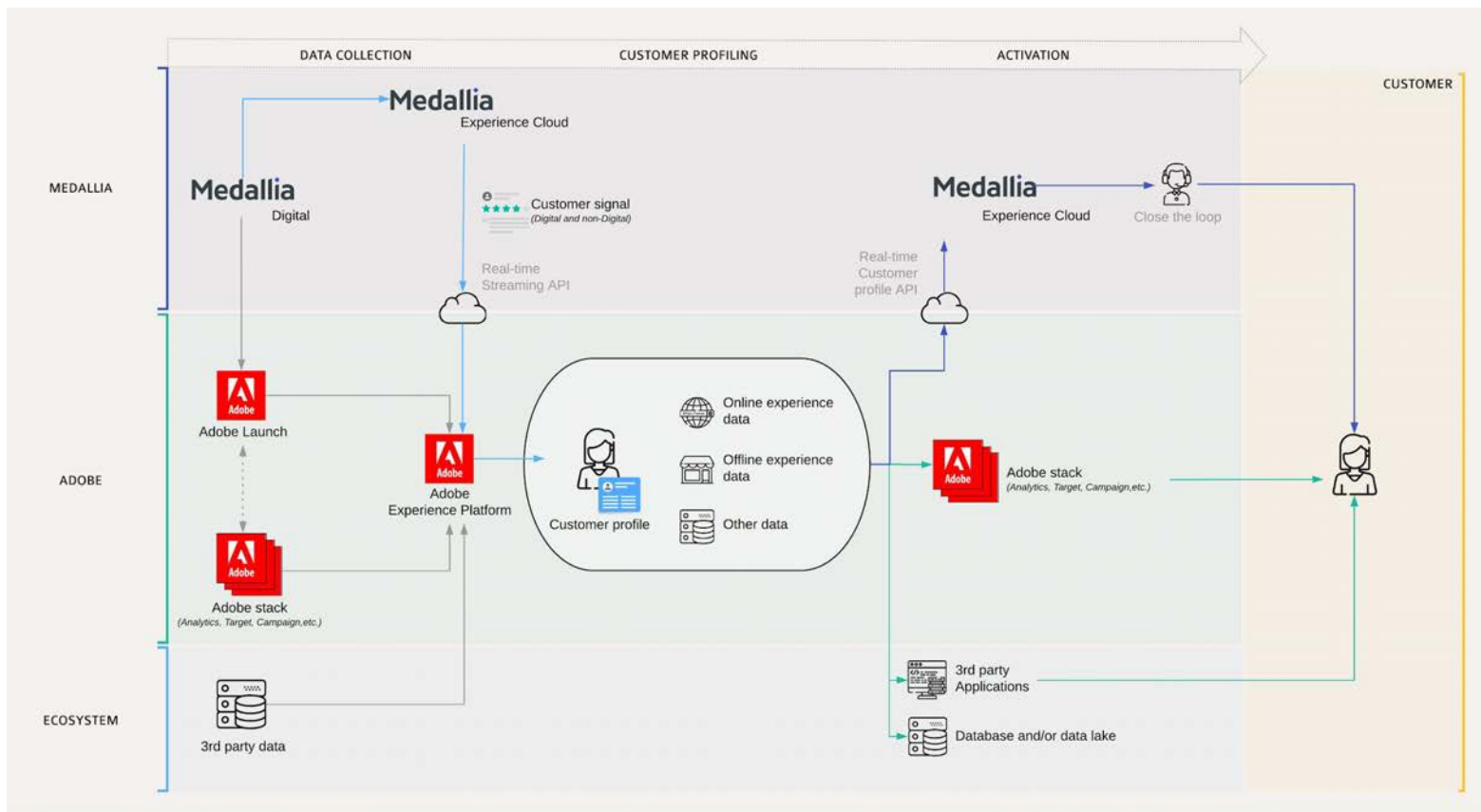




Medallia for Adobe Experience Platform - Implementation Playbook

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Medallia



Omnichannel customer signal in AEP
 * Medallia collects customer signals from any channel
 * Sends signals in real-time to populate Profile and Event data in AEP

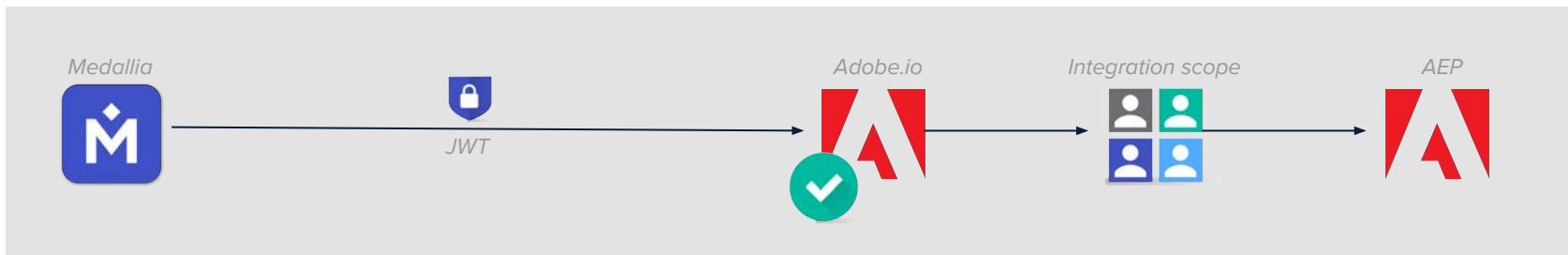
Activation through Medallia
 * Medallia pulls customer profile data in real-time to enrich alerts and help employee close the loop / recover.
 * Medallia pulls on schedule data from AEP to enrich reporting

Activation through Adobe or Ecosystem
 * Journey orchestration: Uses signals from past experiences to influence current one.
 * Richer Customer profile: Blends data from Online and Offline experiences to feed in Adobe stack (e.g. add to specific campaign, report in Analytics, etc.) or 3rd party applications.

Establish connection

Register integration in Adobe.io

JWT and connection details



- **JWT-based authentication** . Adobe APIs require requests to be authenticated using a method called Java Web Token.
- **Adobe.io as a gateway to Adobe.** Clients need to register the integration in Adobe.io. First Medallia creates and shares a private key with the client. Then the client shares back integration details for Medallia to finalize the API config.

Prerequisite: Adobe.io access

Grant developer and user access to AEP

[As documented by Adobe](#), to be able to authenticate to AEP Medallia needs to go through an integration registered in Adobe.io. If you don't already have a user with developer and product user access follow the section called "prerequisite" in the link above.

Make sure all relevant accesses to AEP are granted.

Register integration in Adobe.io

Adobe.io console

To register the integration, follow the instructions in the “One time setup” section of [this doc](#).

Details:

- Name: Medallia for Adobe Experience Platform
- Description: Bidirectional integration between Medallia and AEP
- Public certificate *(Shared by your Medallia team)*

Note: By default the certificate is valid for 3 years. Make sure to upload a new one before it expires.

Download integration details

From Adobe.io account

Example Integration

Overview Insights Services Events JWT Delete

Client Credentials

API Key (Client ID) [Redacted] Copy

Technical account ID [Redacted] Copy

Technical account email [Redacted] Copy

Organization ID [Redacted] Copy

Client secret [Redacted] Copy

Export Details to Postman

Integration Details

Name: Example integration

Description: This is an example integration for connecting Medallia and Adobe Analytics.

Update

FINGERPRINT	EXPIRY DATE
2214d380c73c91c45e81650e5854b1be77381d94	Sep 7, 2020

Add a public key

Details

Integration type: Service Account

Created on: Sep 10, 2019

Last updated on: Sep 10, 2019

Once the integration is registered, open it up and go to the **Overview** tab.

Download details via **Export Details to Postman**.

Share this with your Medallia team. If working on sandbox also share your sandbox name.

Define data dictionary

Custom Event Types

- Customer signal - Medallia (Promoter)
- Customer signal - Medallia (Passive)
- Customer signal - Medallia (Detractor)
- Customer signal - Medallia

Profile data

- Standard Profile schema
- Contact ID (used for identity resolution)
- Last main score
- Last NPS segment

Event data

- Standard Event schema
- Contact ID (used for identity resolution)
- Firstname
- Last name
- Signal ID
- Signal type
- Main score
- Main score comment
- Main Topics
- NPS segment

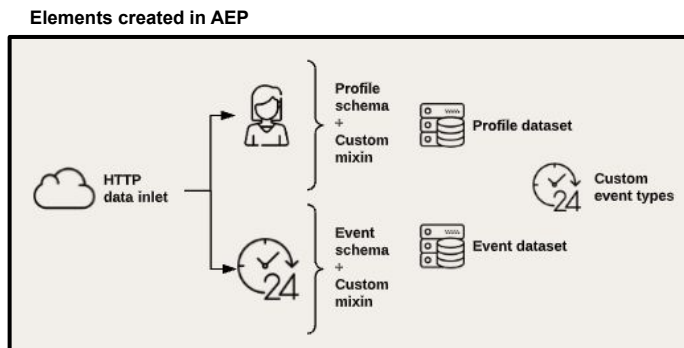
Installation process

Package installation

Automated installation through API

Once the data dictionary is signed off, all required elements are created automatically as part of the package installation.

Dummy data can be uploaded as part of the installation process.



Medallia