

# Omeda Academy Course Catalog 2025

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## **Admin User**

These courses are designed to equip users with the knowledge and skills to streamline their workflows and become more self-sufficient. By learning how to perform specific actions independently, like adding deployment types and products, you'll reduce reliance on support tickets and gain greater control over your tasks.

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Course length: Pre-

Pre-requisites:

N/A

() 10 min.

In this course, you will learn how to use the Manage Users UI to activate, edit, clone and deactivate users. This tool is available for administrative users.

## Ő

Pre-requisites:

Course length: (1) 35 min.

Audience Builder 101: Beginner, Audience Builder 201: Intermediate, Audience Builder 301: Advanced

Admin User: Audience Builder

In this course, administrative users will learn how to configure Audience Builder, including adding to/editing the field library, defining output and reporting fields and updating contact rules for queries. We will also cover how to rebuild Audience Builder to refresh your counts and delete queries from Audience Builder.

#### Learning objectives

What you'll learn:

- Manage Users Menu
- Activate/Deactivate Users
- Edit Users
- Clone Users

### Learning objectives

What you'll learn:

- Configure Audience Builder
   Library
- Configure Output
- Configure Match Evaluation
- Configure Reports
- Configure Contact Rules
- Rebuild Audience Builder
- Delete Queries



Course length: Pre-requisites:

( 35 min. N/A

In this course, we will review Omeda's API library and how you can get started using our APIs to send transactions, look-up customer records, retrieve customer data, authenticate users, send emails and more.

### Learning objectives

- What is an API?
- Omeda API Resources
- Getting Started
   with Omeda APIs
- API Details
- Testing Look-Up APIs
- Testing Stored Data APIs
- Troubleshooting Errors



( **30** min.

N/A

In this course, you will learn about Omeda's new Client Empowerment tool for managing database Profiles. In the Profiles section of the Manage Database tool, users with access can view or edit the settings of a Profile, create a new Profile, or sync their Profile to their Staging environment (if one exists).

#### Learning objectives

What you'll learn:

- View or edit the settings of a Profile
- Create a new Profile

### Client Empowerment: Message Types

Course length: Pre-requisites:

N/A

() 20 min.

In this course, you will learn about Omeda's new Client Empowerment tool for managing Message Types. In the Message Types section of the Manage Database tool, users with access can view, edit, and create the Message Types used for SMS sending. This course will teach you how to view, edit and create new Message Types for your database.

### Learning objectives

What you'll learn:

 View, edit and create new Message Types

## Client Empowerment: Logos

Course length:	Pre-requisites:	
( <b>1</b> ) <b>10</b> min.	N/A	

In this course, administrative users will learn how to access logo settings, upload a new logo or replace an existing logo.

## Learning objectives

What you'll learn:

 Upload a new logo or replace an existing logo





( **30** min.

N/A

In this course, administrative users will learn how to access deployment settings, create a new deployment product or deployment type, edit an existing deployment, or edit the unsubscribe landing page opt-out text.

#### Learning objectives

What you'll learn:

- Creating a Deployment
   Product
- Creating a Deployment Type
- Deployments Additional Areas of Consideration
- Using Created Deployment
   Products and Types

### **Client Empowerment: Demographics**

Course length: Pre-requisites:

N/A

() 30 min.

In this course, administrative users will learn how to access their demographic settings, create a new demographic, or edit an existing demographic.

#### Learning objectives

What you'll learn:

- Create a New Demographic
- Demographics Advanced Settings
- Editing Demographics
- Demographics Additional Considerations

### Client Empowerment: Database Settings

Course length: Pre-requisites:

N/A

() 10 min.

In this course, administrative users will learn how to access your database settings.

#### Learning objectives What you'll learn:

- Managing your Database
- Database Settings



( ) 20 min. N/A

In this course, administrative users will learn how to access behavior settings, create a new behavior, behavior action, or behavior attribute.

#### Learning objectives

#### What you'll learn:

- Behaviors
- Creating a Behavior
- Behavior Attributes
- Creating a Behavior Attribute
- Behavior Actions
- Creating a Behavior Action
- Behaviors Additional Considerations



Course length: Pre-requisites:

N/A

( **)** 20 min.

for your database.

In this course, you will learn about Omeda's new Client Empowerment tool for managing API keys. This course will teach admin users how to view, edit and create new API keys

#### Learning objectives

#### What you'll learn:

- API Keys
- Create an API Key



Course length: Pre-requisites:

🕓 15 min.

. N/A

In this course, administrative users will learn how to access their Alternate IDs as well as view, edit and create additional Authentication or External Alternate IDs.

#### Learning objectives What you'll learn:

- Alternate IDs
- Create an Alternate ID





# **Audience Builder**

Harness your audience data to create winning customer experiences. In these courses, learn how to create queries based on behavior and demographics, and how to query personalizations, form submissions and paid records.



## Audience Builder 101: Beginner

Course length: P

Pre-requisites:

( **30** min.

N/A

In this course, you will learn how to use Audience Builder to segment your customers, including how to create queries based on email behavior, demographics and product membership.

#### Learning objectives

#### What you'll learn:

- What is Audience Builder?
- How to Access Audience
   Builder
- Creating a Query
- Field Library
- Contact Rules
- Email Behavior Query
- Product Query
- Demographic Query

## Audience Builder 201: Intermediate

Course length: Pre-requisites:

(1) 70 min. Audience Builder 101: Beginner

In this course, you will learn how to use groups in an Audience Builder query, as well as create a query skittle, run reports and output a query. This course will also cover how to use the Match Evaluation tool.

### Learning objectives

#### What you'll learn:

- Audience Builder Groups
- Query Fields
- Match Evaluation
- Audience Builder Output
- Audience Builder Reports

## Audience Builder 301: Advanced

Course length:

Pre-requisites:

60 min. Audience Builder 101: Beginner, Audience Builder 201: Intermediate

In this course, you will discover how to create advanced queries in Audience Builder.

## Learning objectives

- Query on Olytics Data
- Query on Behavior Data
- Query on Personalization
- Query on Form Submits
- Querying Dates



Course length: Pre-

**Pre-requisites:** 

(1) 30 min. Audience Builder 101: Beginner

In this course, you will learn how to use Audience Builder to query paid records.

#### Learning objectives

What you'll learn:

- Paid Fields in Audience Builder
- Query Auto-Renewal Records
- Query Pending Orders
- Query Graced Issues

## Audience Builder: How-To Use Issue Builder

Course length: Pre-requisites:

ric requisites.

() 25 min. Audience Builder 101: Beginner Audience Builder 201: Intermediate

In this course, you will learn how-to use Issue Builder to balance your issue and identify the records you want to add or remove as part of your issue close.

### Learning objectives

- How to use Issue Builder
- Identify Records to Add
   or Remove



# **Audience Search**

Search for customers to easily review and update their contact information, magazine/email subscriptions and order history, behaviors, demographics, and email permissions.

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Course length: Pre-

Pre-requisites:

() 30 min.

N/A

In this course, you will learn how to use Audience Search to search for customers and make updates to their record. You will also learn how to add new customers and merge records.

#### Learning objectives

#### What you'll learn:

- What is Audience Search?
- Help Screens
- Basic Search
- Advanced Search
- Preferences
- How to Add a Customer
- Updating Customer Records
- Viewing Customer Behavior
- Viewing Customer
   Deployments
- Deactivating Customer Records
- Merging Customer Records

## **Q** Audience Search 201: Intermediate

Course length: Pre-requisites:

() 45 min. Audience Search 101: Beginner

In this course, you will learn how to view subscription and transaction details, as well as renew and add subscriptions, adjust transactions, issue refunds and suspend/cancel subscriptions.

#### Learning objectives What you'll learn:

- Subscription Management
- Adding a New Product
- Single Copy Sales
- New Subscriptions
- Renewing a Subscription
- Adding a Payment
- Adjusting Transactions
- Suspending a Subscription
- Reinstating a Subscription
- Refunding a Subscription
- Canceling a Subscription
- Gift Subscriptions
- Invoices and Receipts



## **Campaign Tool**

Use Omeda's Campaign Tool to offer various terms and prices on your forms and easily schedule outputs from the database. Upload and update existing promo codes, host content, and create lead scores in Omeda.





Course length: Pre-re

Pre-requisites:

() 20 min. Audience Builder 101: Beginner

In this course, you will learn how to create a scheduled output to have recurring lists automatically output based on a segment query.

#### Learning objectives

What you'll learn:

- Creating a Scheduled Output
- Use Cases for Scheduled
   Outputs
- Deactivating Customer Records
- Merging Customer Records



Course length: Pre-requisites:

( 20 min. N/A

In this course, you will learn how to create a new promo code in the campaign tool, as well as upload a list of promo codes and search for existing promo codes.

### Learning objectives

- Accessing the Campaign Tool
- Searching for Promo Codes
- Downloading Promo Codes
- Deactivating Promo Codes
- Creating a Promo Code
- Campaign Pricing
- Uploading Promo Codes





# Customer Data Platform

Unify your first-party data to simplify your workflows and create more personalized, successful audience experiences. Learn how to navigate our CDP, set up website behavior tracking, query your website data, target content to website visitors with on-site personalizations, and monetize your content with meters.





( **30** min.

N/A

In this course, you will learn about Olytics, an essential feature of Omeda's CDP solution. Olytics allows you to track the behaviors of your website users and connect these behaviors with the data stored in Omeda. This course will teach you how to add the Olytics scripts to your websites, test Olytics, query on Olytics data and run reports.

#### Learning objectives

#### What you'll learn:

- What is Olytics?
- Olytics Actions, Behaviors and Tags
- Implementing Olytics
- Testing Olytics
- Querying Olytics Data in Audience Builder
- Olytics Reports

## Personalization 101: Beginner

Course length: Pre-requisites:

(1) 50 min. Audience Builder 101: Beginner

In this course, you will learn how to display targeted content to your website audience directly on your site using personalization messages.

#### Learning objectives

What you'll learn:

- What is Personalization?
- How to Access Personalization
- Types of Personalization
- Setting up a Personalization
- Personalization Messaging
- Click Tracking
- Standard Personalizations
- Exit Intent Personalization
- Scroll Trigger
   Personalizations
- Testing a Personalization
- Cloning a Personalization

## Personalization 201: Intermediate

Course length: Pre-requisites:

() 25 min. Personalization 101: Beginner

In this course, you will learn how to create a GDPR personalization, as well as an in-line personalization. This course will also cover how to view the performance of personalization jobs.

### Learning objectives

- Global Settings
- GDPR Personalization
- In-line Personalizations
- Personalization Reports
- Personalization Queries in Audience Builder





#### Course length: Pre-i

#### Pre-requisites:

50 min. Audience Builder 101: Beginner Personalization 101: Beginner

In this course, you will learn how to use Omeda's metering tool to create paywalls and gate content on your sites.

#### Learning objectives

- What is Metering?
- Meter Access & Landing
   Page
- Metering Sites
- Setting up a Meter
- Testing a Meter
- Cloning a Meter
- Meter Reporting



Data Loader

Easily map and migrate contact data into your unified audience with Data Loader. In these courses, you will learn how to load data, set validation, matching and data integrity rules; send contact data from a third-party platform to Omeda via webhooks; and query your uploaded records in Audience Builder.

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( **15** min.

N/A

In this course, you will learn how you can send data from a third party platform to the Omeda database by using webhooks. This course will teach you how to create a webhook via Data Loader and map the data you are sending, as well as provide some best practices.

#### Learning objectives

#### What you'll learn:

- What is a Webhook?
- Webhook Best Practices
- Supported Platforms
- Creating a Webhook
- Data Mapping

# + Data Loader 101: Beginner

Course length: Pre-requisites:

( 45 min. N/A

In this course, we will review Omeda's Data Loader tool and how you can get started using Data Loader to process data. This course will cover an introduction to and basic navigation in Data Loader, how to load data with Data Loader, validation rules and templates you can apply to each data load, as well as querying your processed Data Loader files in Audience Builder.

#### Learning objectives

- Introduction
- Basic Navigation
- Loading Data
- Validation Rules
- Validation Rules by Use Case
- Templates
- Loading Controlled Magazine
   Data
- Querying in Audience Builder

## **Email Builder**

Learn how to set up and send emails, and how to measure your impact to maximize opens, clicks and conversions on Omeda. Also learn how to evaluate and optimize your email engagement and deliverability – and how to diagnose key performance issues like email fatigue and click activity.

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Course length: Pre-

**Pre-requisites:** 

() 1hr.

N/A

In this course, you will learn how to use Email Builder to deploy a simple email, as well as resolve common errors.

#### Learning objectives

What you'll learn:

- What is Email Builder?
- How to Access Email Builder
- Creating a Simple Email
   Deployment
- Solving Common Errors



## Email Builder 201: Intermediate

Course length: Pre-requisites:

C 25 min. Email Builder 101: Beginner

In this course, you will learn how to send triggered emails and use A/B testing to test subject lines, from lines and message content.

### Learning objectives

What you'll learn:

- Triggered Deployments
- A/B Testing

## Email Builder 301: Advanced

Course length: Pre-requisites:

() 1hr.

Email Builder 101: Beginner, Email Builder 201: Intermediate

In this course, you will learn how to integrate dynamic content in your email and set-up a recurring email series. We will also review how you can use our forward to a friend options and add stealth links into your emails.

### Learning objectives

What you'll learn:

- Dynamic Content
- Recurring Email Deployments
- Forward to a Friend
- Stealth Links



Course length: Pre-rec

() 1 hr.

#### Pre-requisites:

Email Builder 101: Beginner, Email Builder 201: Intermediate, Email Builder 301: Advanced

In this course, you will learn how to use the advanced features in Email Builder.

#### Learning objectives

- Deployment Defaults
- Web Tracking
- Preference Pages
- Opt-out Settings



N/A

**Course length:** 

( ) 20 min.

In this course, we will review Omeda's designer tool, our drag-anddrop HTML builder. The Designer makes it easy to create emails in Email Builder, Odyssey and Form Builder. It is also integrated with our CDP and can be used to build personalizations and meters.

#### Learning objectives

#### What you'll learn:

- Designer Tool
- Content •
- Rows
- Settings •
- Templates •
- Saving •



Course length: **Pre-requisites:** 

( \) 35 min. N/A

In this course, we will review how to access delivery and response statistics for your email deployments.

#### Learning objectives What you'll learn:

- Basic Email Reports
- **Deployment Delivery Reports** •
- Summary Stats Reports •



**Course length: Pre-requisites:** 

( <sup>1</sup>) 25 min.

**Email Builder: Reporting 101** 

In this course, you will learn how to use our more advanced email reports to further analyze your deliverability, list fatigue and click activity.

#### Learning objectives

- Deliverability Reports
- **Category Tracking Reports** •
- **Click Activity Reports** •
- **Clickbot Reports** •
- Other Email Deployment • Reports



# **Form Builder**

Learn how to effectively create and customize your forms using our intuitive Form Builder tool. Discover how to capture valuable data from your audience and streamline your data collection processes.





( 90 min.

N/A

In this course, you will learn about Form Builder, our powerful web form building tool which allows you to capture data from your audience on Omeda-hosted web forms. This 101 level training course will cover an overview of our Form Builder tool and the options available within, including the Form Builder Dashboard, Settings, Content and Builder. It will also provide details on how you can quickly and easily create a new form using this tool.

#### Learning objectives

#### What you'll learn:

- What is Form Builder?
- Navigation
- Content
- Create a Form
- Builder

## Form Builder 201: Intermediate

Course length: **Pre-requisites:** 

( \) 30 min. Form Builder 101: Beginner

In this course, you will learn how to build and use Expressions on your forms, which can be used for displaying or requiring content. You will also learn how to utilize our Error Log to troubleshoot failed form submissions when testing forms or after receiving a customer inquiry and how to apply styling to your forms.

#### Learning objectives

#### What you'll learn:

- Expressions
- Styling your Forms
- Error Log

## Designer 101: Beginner

**Course length: Pre-requisites:** 

( <sup>(</sup>) 20 min. N/A

In this course, we will review Omeda's designer tool, our drag-anddrop HTML builder. The Designer makes it easy to create emails in Email Builder, Odyssey and Form Builder. It is also integrated with our CDP and can be used to build personalizations and meters.

#### Learning objectives

- Designer Tool
- Content
- Rows .
- Settings
- Templates .
- Saving

Odyssey

Reach the right audience with the right message at the right time. In these courses, learn how to create targeted automated voyages on Odyssey, our marketing automation tool. Then we'll walk through our personalization features, including Content Recommendations, Issue Builder and on-page personalization messages.

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() 1 hr 15 min. Audience Builder 101: Beginner Email Builder 101: Beginner

In this course, you will learn about Odyssey, Omeda's Marketing Automation platform. You will learn the basic features of this tool and how to create a simple welcome voyage.

#### Learning objectives

#### What you'll learn:

- What is Odyssey?
- Odyssey Basics
- Odyssey Elements
- Saving and Scheduling Voyages
- Reporting
- Welcome Voyage Use Case



Course	length:	Pre-requisites:
--------	---------	-----------------

25 min. Odyssey 101: Beginner
 Personalization 101: Beginner

In this course, you will learn how to add a personalization to your Odyssey voyage, as well as use the split and A/B testing elements. This course will also cover how to query an Odyssey voyage in Audience Builder.

#### Learning objectives

#### What you'll learn:

- Personalization Element
- Split Element
- A/B Test Element
- Form Submit Element
- Export Element
- Querying an Odyssey Voyage in Audience Builder



#### Course length: Pre-requisites:

() 30 min.	Odyssey 101: Beginner
	Personalization 101: Beginner

In this course, you will learn how to add metering and the marketplace elements to your Odyssey voyage. This course will also cover the fatigue filter and how to use dynamic content within emails sent from Odyssey.

#### Learning objectives

- Global Settings
- Custom Templates
- Metering Element
- Facebook Ad Manager
   Element
- Facebook Events Manager
   Element
- Google Ad Manager Element
- AdRoll CRM Audience
   Element
- AdRoll Event Based Audience
   Element
- Fatigue Filter Element
- Dynamic Content





() 20 min. N/A

In this course, we will review Omeda's designer tool, our drag-anddrop HTML builder. The Designer makes it easy to create emails in Email Builder, Odyssey and Form Builder. It is also integrated with our CDP and can be used to build personalizations and meters.

#### **Learning objectives**

- Designer Tool
- Content
- Rows
- Settings
- Templates
- Saving



# Advanced Features

These courses are designed for users who want to explore the advanced features and capabilities of our platform. Learn how to leverage product add-ons, discover innovative use cases, and seamlessly integrate our platform with other tools.





(1) 25 min. Personalization 101: Beginner

In this course, you will learn how to use Omeda's Content Recommendation feature to recommend links to your website visitors. This tool will allow you to create a more personalized experience for visitors.

#### Learning objectives

#### What you'll learn:

- How-To Configure Content Recommendations to Olytics Behaviors
- How-To Create a Content Recommendation Personalization
- How to Use Content Recommendations in Email Builder

#### Learning objectives

What you'll learn:

- SMS What to Know
- Getting Started
- Collecting Opt-Ins
- Builder Dashboard
- Searching for an SMS Message
- Creating an SMS Message
- Sending/Scheduling an SMS Message



Course length: Pre-requisites:

() 20 min. N/A

In this course, you will learn about Omeda's new tools for sending SMS messages. This course will teach you what to know about sending SMS messages from Omeda (including gathering consent), how to get started by creating message types and how to collect opt-ins from your customers in order to be able to send SMS messages. You will also learn how to create, search for, schedule and send an SMS message from Omeda.



( 30 min. N/A

In this course, you will learn about Omeda's integration with Stripe, a preferred payment gateway. This course will help you set up and effectively use our Stripe Connect integration, enabling you to accept payments seamlessly within your Omeda account.

#### Learning objectives

- Integration Overview & Payment Gateway Setup
- Reporting Dashboard
- In-App Payments & Disputes Reporting
- Account Management Tool
- Using Stripe Payments in Form Builder
- Stripe in Audience Search and Customer View

### Q Use Case: Using CredSpark to Grow & Engage your Audience

**Course length:** 

Pre-requisites:

( 25 min. Personalization 101: Beginner

In this course, you will learn how you can leverage CredSpark to convert anonymous customers to known, engage your audience and append data to your records.

#### Learning objectives

#### What you'll learn:

- What is Credspark?
- Embedding CredSpark Interactions on your Website
- Embedding Interactions in Personalizations/Email

# API 101: Beginner

**Pre-requisites:** 

Course length:

() 35 min. N/A

In this course, we will review Omeda's API library and how you can get started using our APIs to send transactions, look-up customer records, retrieve customer data, authenticate users, send emails and more.

#### Learning objectives

What you'll learn:

- What is an API?
- Omeda API Resources
- Getting Started with Omeda APIs
- API Details
- Testing Look-Up APIs
- Testing Stored Data APIs
- Troubleshooting Errors

## Client Empowerment: API Keys

Course length: Pre-requisites:

( ) 20 min. N/A

In this course, you will learn about Omeda's new Client Empowerment tool for managing API keys. This course will teach admin users how to view, edit and create new API keys for your database.

#### Learning objectives What you'll learn:

- API Keys
- Create an API Key



## Onboarding

New to Omeda? Get the background you need to reach your audience growth goals. Learn how to navigate the platform and use our support portal, plus best practices for structuring your data. We will also show you how to QC your forms, Olytics set-up and conversion data.





(<sup>1</sup>) 15 min.

N/A

This course is designed for new clients at the start of their onboarding journey. It includes a tour of the Omeda portal, instructions on how to use JIRA, our client support portal, an overview of frequently used Omeda terms and a summary of Omeda's products & solutions.

#### Learning objectives

#### What you'll learn:

- Omeda Portal
- JIRA Client Support Portal
- Omeda Dictionary
- Omeda Product Overview



( ) 20 min. N/A

This course is designed for clients in onboarding as they start to think about how to structure their data in the Omeda database. It includes a review of the various ways that Omeda can ingest data, a walkthrough of basic Audience Builder queries and a report overview.

#### Learning objectives

#### What you'll learn:

- Data Ingestion
- Querying the Omeda Database
- Basic Reports



Course	length:	Ρ
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Pre-requisites:

() 15 min.

Email Builder: Reporting 101

This course is designed to help clients in onboarding test their forms and the set-up of their Olytics scripts, as well as QC their data once the conversion has been completed.

#### Learning objectives

- Testing your Forms
- Testing your Olytics Set-Up
- How to QC your Records
- How to QC your Notices





Explore our reporting features and learn how to analyze key metrics. In these courses, you will learn how to track email performance metrics to optimize your email campaigns, as well as generate financial reports to uncover actionable trends.

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## **Reports & Analytics: Financial Reports**

Course length: Pre-requisites:

( **25** min.

N/A

In this course, we will review the standard financial reports, including the end of month financial reports and other primary financial reports.

#### Learning objectives

#### What you'll learn:

- End of Month Financial Reports
- Deposit Report
- Refund Report
- Daily Liability Report
- Daily Accounts Receivable
   Report
- Daily GL Upload Report
- Earned/Deferred Income Analysis
- Sales Tax Report
- Monthly Revenue Report



Course length: Pre-requisites:

() 35 min. N/A

In this course, we will review how to access delivery and response statistics for your email deployments.

#### Learning objectives What you'll learn:

- Basic Email Reports
- Deployment Delivery Reports
- Summary Stats Reports



Course length: Pre-requisites:

( 25 min. Email Builder: Reporting 101

In this course, you will learn how to use our more advanced email reports to further analyze your deliverability, list fatigue and click activity.

### Learning objectives

- Deliverability Reports
- Category Tracking Reports
- Click Activity Reports
- Clickbot Reports
- Other Email Deployment Reports



# Course Recommendations

### **Executive Management**



### **Audience Development**



### **Customer Service**



## Digital/Technical Onboarding Launch Olytics 101 Provide API 101 Data Loader: Webhooks

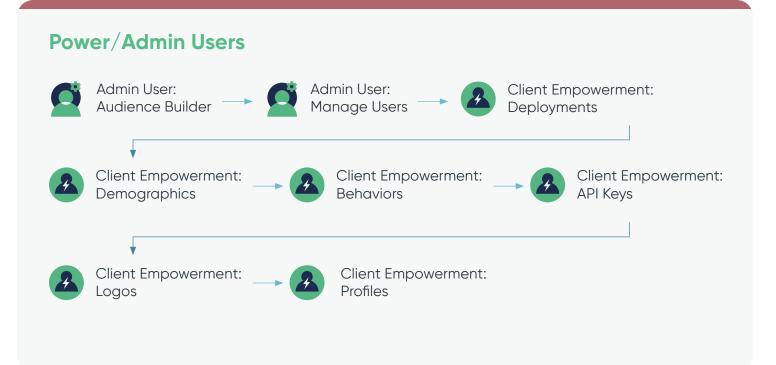




### Marketing











#### About Omeda

Omeda is a SaaS provider delivering the platform and expertise required to maximize the value of media and publishing businesses' most critical asset — their audience. The platform of choice for B2B and B2C professionals, Omeda's integrated solution, which includes a customer data platform, workflow automation, email automation, and subscription management, provides the professional tools and controls required to maximize a media business' diverse revenue streams, power 24/7 audience development, and orchestrate precise targeting for measurable results. Our platform is built by passionate audience pros, workflow masters, and data nerds who partner with our customers to grow and thrive in a disruptive media world.

For more information visit omeda.com

Request a demo at omeda.com/demo

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