

AJO Loyalty - Base Exercise

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1. AJO Loyalty Setup Overview

The purpose of this document is to outline the necessary steps to walk through a sample Demo of an AJO Loyalty Challenge in AJO.

NOTE: The "Total Time" for completion of creating a Task, creating a Challenge and testing the Challenge takes approximately 1.5 hours for completion in an HOL setting. If you want to do this ONLY as a Demo, you should budget about 20-30 minutes. Keep these time frames in mind as you work with your Adobe Team and client requests.

AJO Loyalty Configurations

Before challenges can be authored, an administrator configures the program foundations: reward providers, event definitions that map customer actions to task completions, product inventory, and exclusion lists.

AJO Loyalty Challenges

Marketers create challenges by selecting a type (Standard, Streak, Sequential, or Bring your own data), configuring settings (audience, schedule, rules), and defining tasks and rewards. They can optionally surface the challenge on member-facing interfaces using a content card or code-based experience, and set up channel notifications for key moments across the challenge lifecycle. Once configured, they publish the challenge, generate the auto-built journey, and publish it to make the challenge live.

AJO Loyalty Journey

The steps / process for creating a Journey which utilizes the AJO Loyalty Challenge are relatively the same as previous design documentation has provided. The steps include:

- Create the Journey
- Design the Journey
- Test the Journey
- Publish the Journey

One distinction for the AJO Loyalty Journey will be the inclusion of "Loyalty Events". Note that these are different from standard AJO Events that are created through Configurations → Events. These are two separate event types. The distinction is that the Standard Event utilizes the Standard Event Schema, whereas Loyalty Events utilize the Loyalty Events Schema.

AJO Loyalty Reporting

Use Loyalty Challenges reporting to see how your challenges are performing. Check who is signing up, who is completing challenges, and how much revenue your program is generating — all in one place. Data comes from Adobe Customer Journey Analytics.

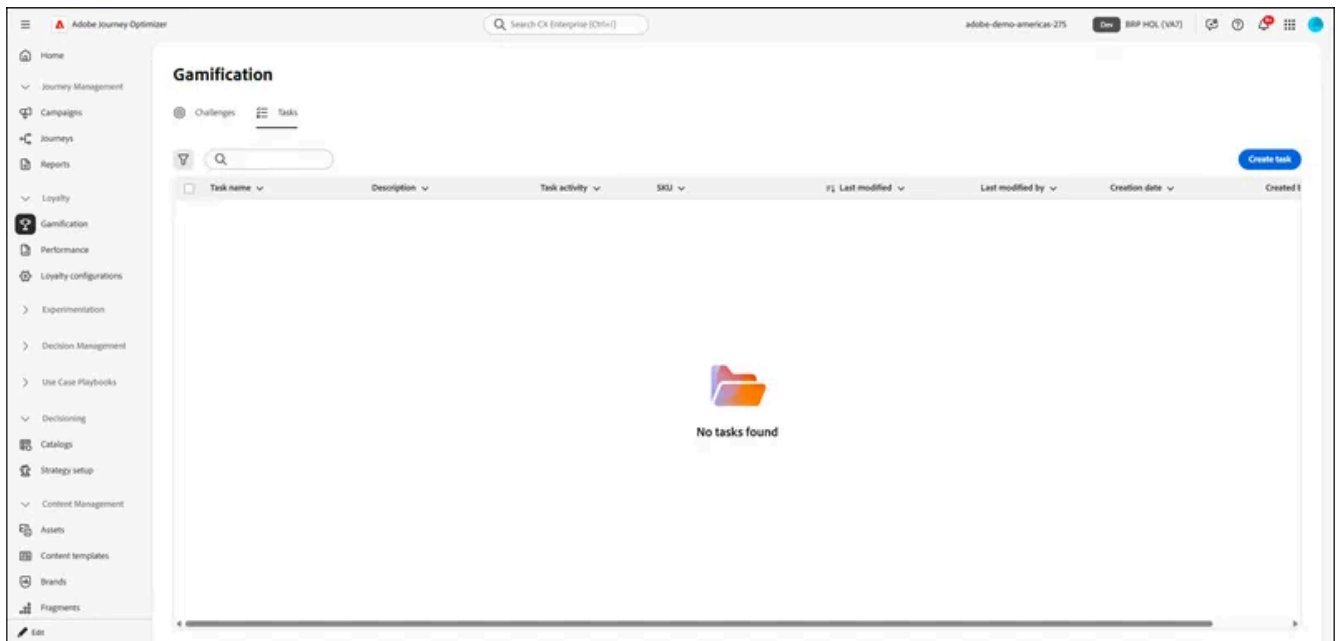
To open the reporting dashboards, go to **Loyalty Challenges** in Journey Optimizer and select **Performance** in the left navigation.

The reporting interface has two tabs:

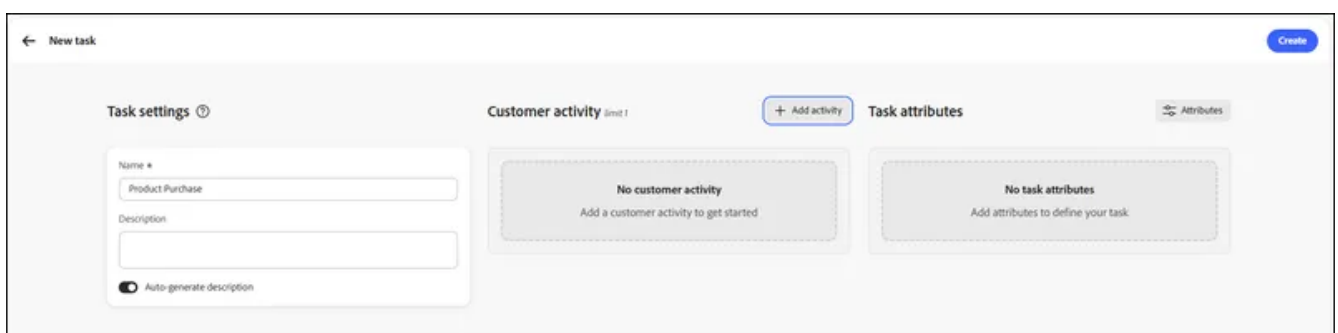
- **Reports:** Numbers and charts for your challenges.
- **Insights:** Cards that highlight what deserves your attention right now.

1.1. Create a Task

1. This exercise will introduce the topic of "How to create a Task" in AJO. This task will be used in subsequent exercises and labs.
2. (**NOTE:** Some exercises may vary during the actual Hands on Lab versus what is listed in the HOL Page, due to industry setup and / or presenter preferences.)
3. Navigate to the **Loyalty - Gamification** tab in AJO:
4. Click on the **"Tasks"** tab:



- 5.
6. Click the **"Create Task"** button:
7. Give your task a name. We chose **"Product Purchase"** for this one:



- 8.
9. Click on the "Add Activity" button:
10. For this exercise, we will choose the "Purchase" activity:

Select customer activity

CancelAdd

Select the customer activity that best aligns with your outcome goals. Each type has specific available attributes to further define and shape the task.

**Purchase**

Customers will purchase 1 or more items to complete this task

**Spend**

Customers will spend a specified amount to complete this task

**Custom event**

Customers will perform a custom configured AEP event

11.

12. Click on "Purchase" and then click the "Add" button to add it to your Task:

Select customer activity

CancelAdd

Select the customer activity that best aligns with your outcome goals. Each type has specific available attributes to further define and shape the task.

**Purchase**

Customers will purchase 1 or more items to complete this task

**Spend**

Customers will spend a specified amount to complete this task

**Custom event**

Customers will perform a custom configured AEP event

13.

14. Back on the Task Settings page, under Task Attributes, click on the Quantity to increase it to "1" - as we will only be checking to ensure that the customer purchases 1 item from our Product List.

Task attributes

Attributes

123

Quantity

Number of items required to purchase

1

-

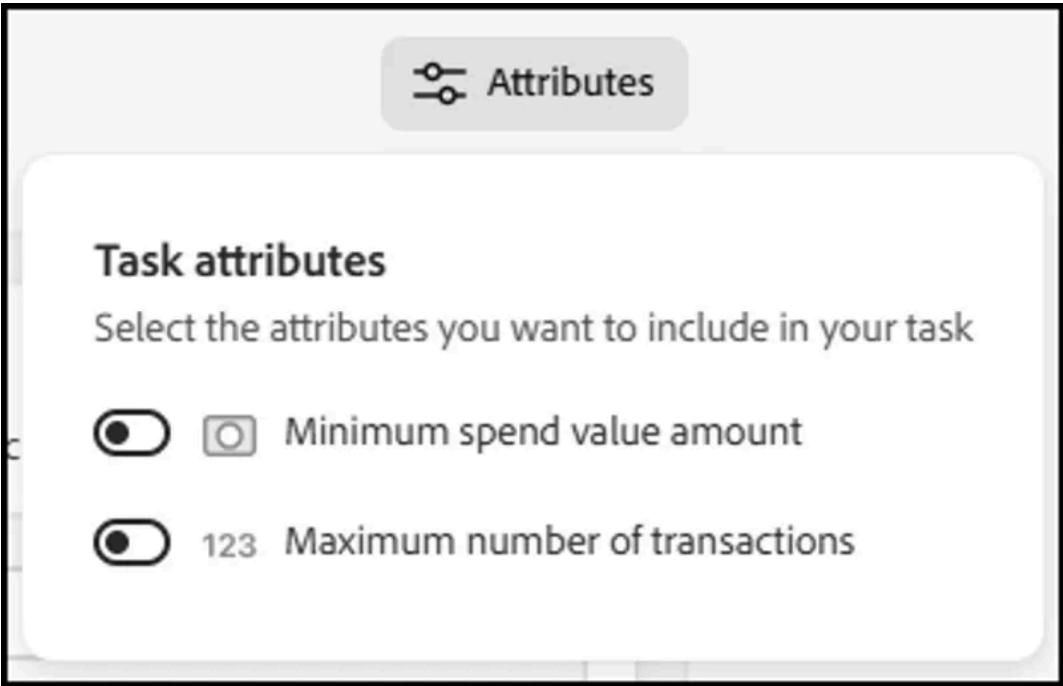
+

Eligible items & exclusions

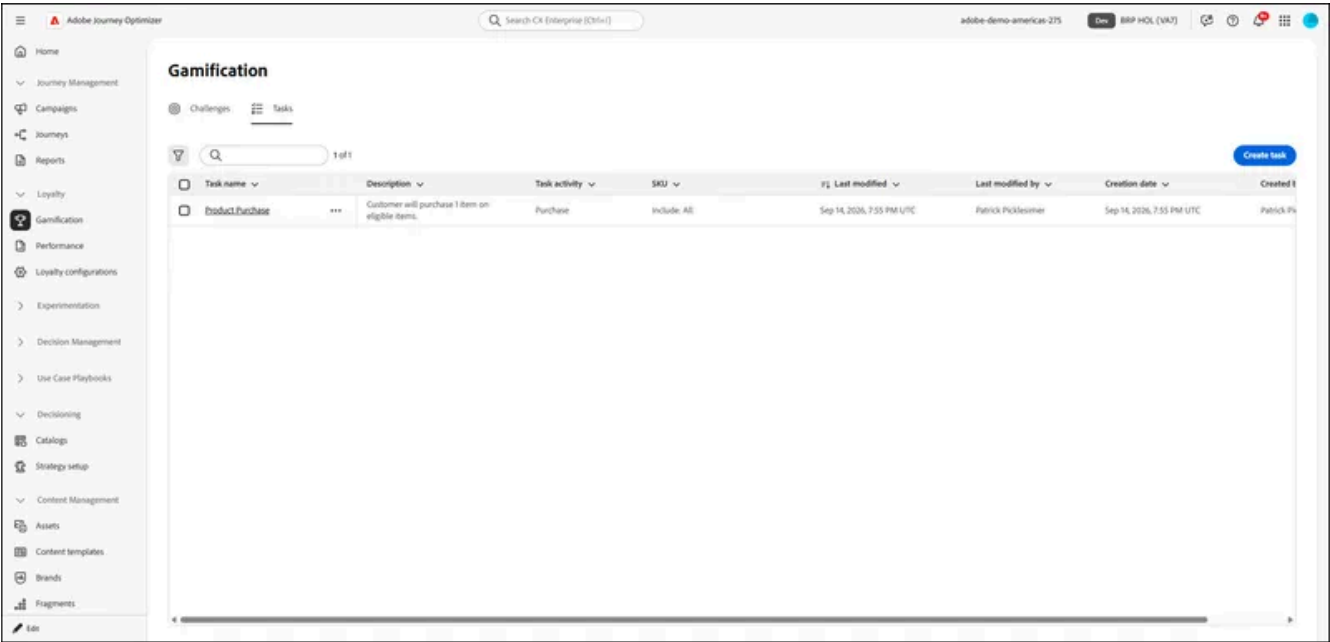
Items/item groups that count towards task completion and the ones that don't

Add

15.
16. Note you can include other attributes for minimum spend or number of transactions using the "attributes" button. We will not be including these for this exercise:



- 17.
18. Similarly, we will not be excluding particular products in this exercise, so we will not be modifying the "Eligible Items and Exclusions" section.
19. Click "Create" to create your Task.
20. Your Task should now appear in the Tasks list:

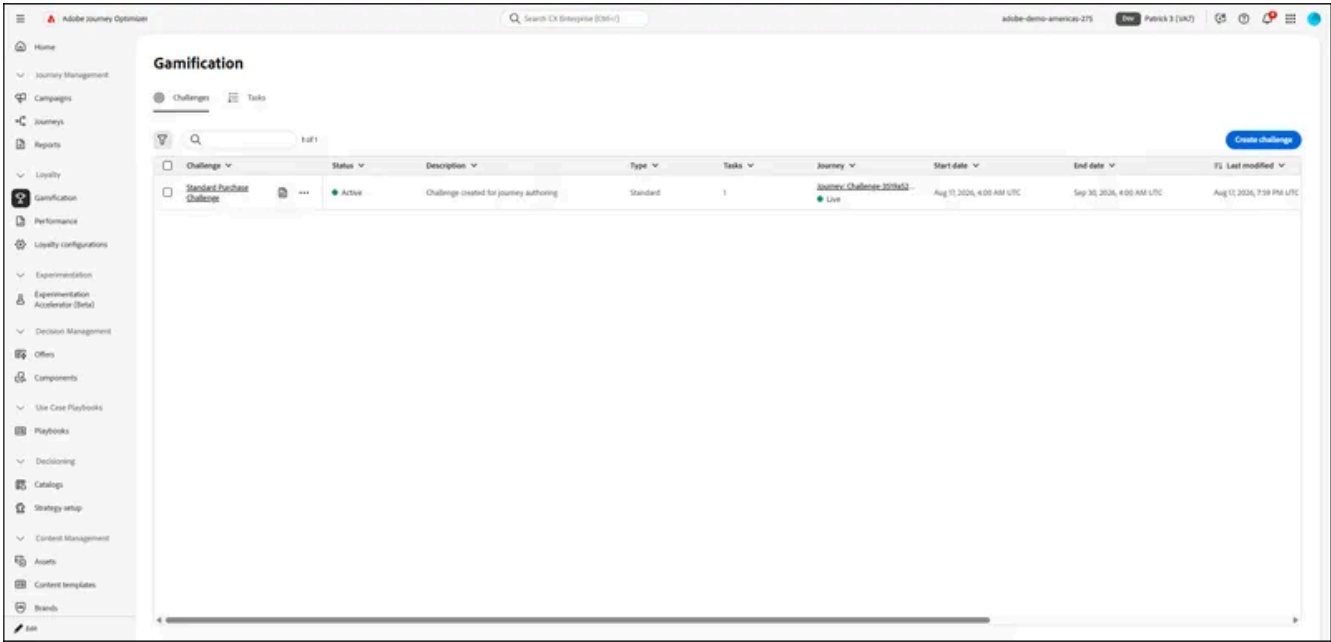


- 21.
22. End of Exercise.

1.2. Loyalty Challenge

(DRAFT DOCUMENT - NOT COMPLETE)

- 1. Once you have completed all of the Loyalty Setup steps, you can begin to create a Loyalty Challenge. Proceed to the "Gamification" tab under "Loyalty" in AJO:
- 2. Click on the **Create Challenge** button in the top right corner:



- 3.
- 4. Choose Standard, Streak or Sequential:

Create a challenge

CancelCreate

☒ Task A

☒ Task B

Standard

Members can complete one or more tasks in any order.

☒ Task A

☒ Task A

☒ Task A

Streak

Members repeat the same task multiple times. (e.g., daily or weekly)

☒ Task 1

☒ Task 2

☒ Task 3

Sequential

Members complete all tasks in a set order to finish the challenge.

Standard

Members can complete one or more tasks in any order.

💡 Best for

Driving participation for discovery campaigns or seasonal promos.

💖 Example

Complete any 3 of 5 activities this month to earn 500 pts.

5.

6. For this example, we will choose "Standard". Click on the **Create** button.

7. On the next screen, give your Challenge a name. We chose "Purchase Challenge":

8.

Settings Structure Content Messaging

Challenge details

Name *

Purchase Challenge

Challenge ID

42b87f68-dcce-4ff6-a55e-30d6be16bad6

Description

Audience

Who can participate



No audience selected

Challenge will be active for all loyalty members

+ Add audience

Challenge prerequisites

Must complete specific challenges to be eligible

Audience members will only be eligible if they have completed the selected challenges.

+ Require challenge completion

9.

10. For Audience, you can select an Audience for the target of the Challenge, if you would like to do so. We will leave it blank for this exercise.

11. Similarly, you could set up a Challenge Prerequisite, but we will not do that for this exercise.

12. Under "Schedule" - provide a beginning and ending Date/Time for your challenge:

12 / 27

Created at Sep 30, 2026

Schedule

Challenge schedule ?

Challenge start *

Challenge end *

Time zone * i

9 / 7 / 2026, 3 : 36 PM 📅

10 / 31 / 2026 , 3 : 36 PM 📅

Eastern Daylight Time (Americ... ▼

Challenge start and end times use the selected time zone for all loyalty members.

Task completion window

All task completion window times are represented in the POS or customers local time zone

Tasks must be completed

Any time during challenge ▼

13.

14. Under "Rules", you can add specific tracking progress and repeat rules. We will not add these for this exercise:

Rules

Start tracking progress

Task progress tracking starts

Start

When challenge starts (after opt-in) ▼

mm / dd / yyyy, -- : -- AM 📅

Lets customers receive content and opt in before the challenge opens for progress.

Repeat limits

Challenge can be completed

Number of times it can be completed

Once ▼

-

+

Completion settings are subject to the challenge schedule.

15.

16. Click the "Structure" tab at the top to move onto the next section.

17. In the next section, click on the appropriate fields for:

18. Task Completion Requirements

19. Number of Tasks that Must be Completed

20. Add a task

Tasks inventory

Cancel

New

Add

Search tasks

1 of 10

☒	Task name	Description	SKU	Task activity	Creation date	Last modified
☒	Product Purchase	Customer will purchase 1 item on eligi...	All	purchase	Sep 14, 2026, 7:55 PM UTC	Sep 14, 2026, 7:55 PM UTC

21.

22. Under the Completion Rewards, add a value for Number of Points. We chose 500.

23. Your structure should look similar to the following:

Settings

Structure

Content

Messaging

Tasks

Complete 1 task

Task completion requirements

Customer completes specific number of tasks

Number of tasks that must be completed

1

Product Purchase

Customer will purchase 1 item on eligible items.

+ Add task

Milestone rewards

Completion rewards

Earn up to 500 Points

Add rewards members earn when they complete the challenge

500 Points

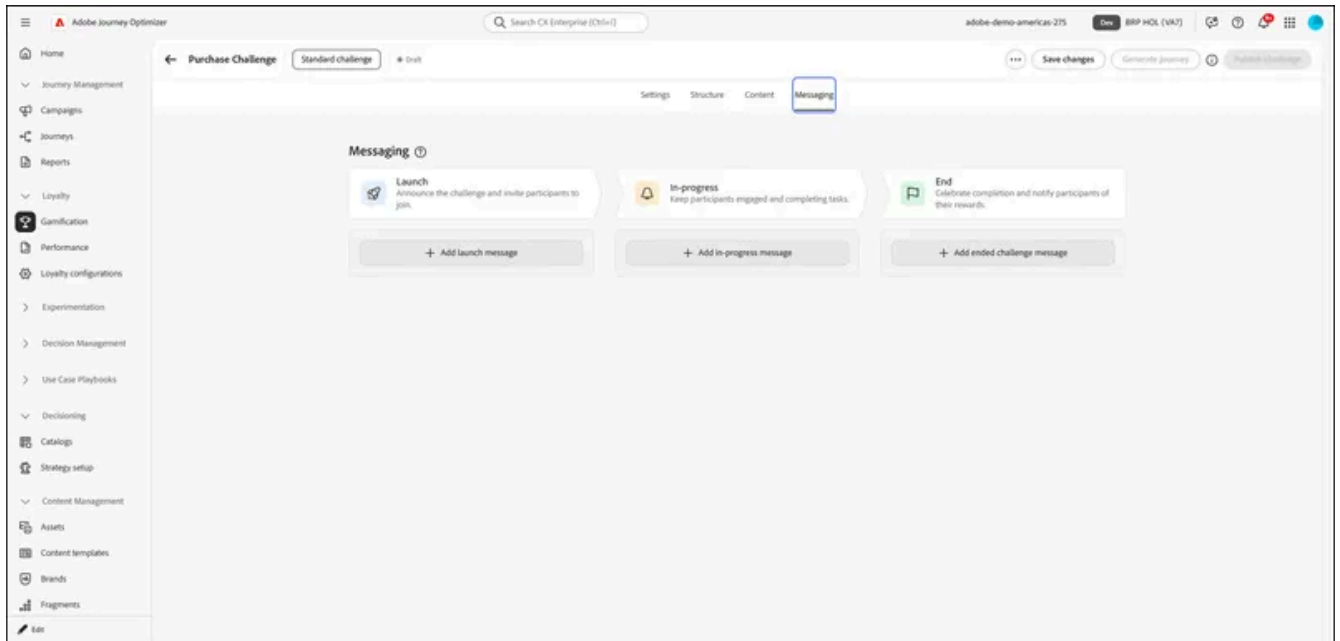
Loyalty currency

Number of Points

500

24.

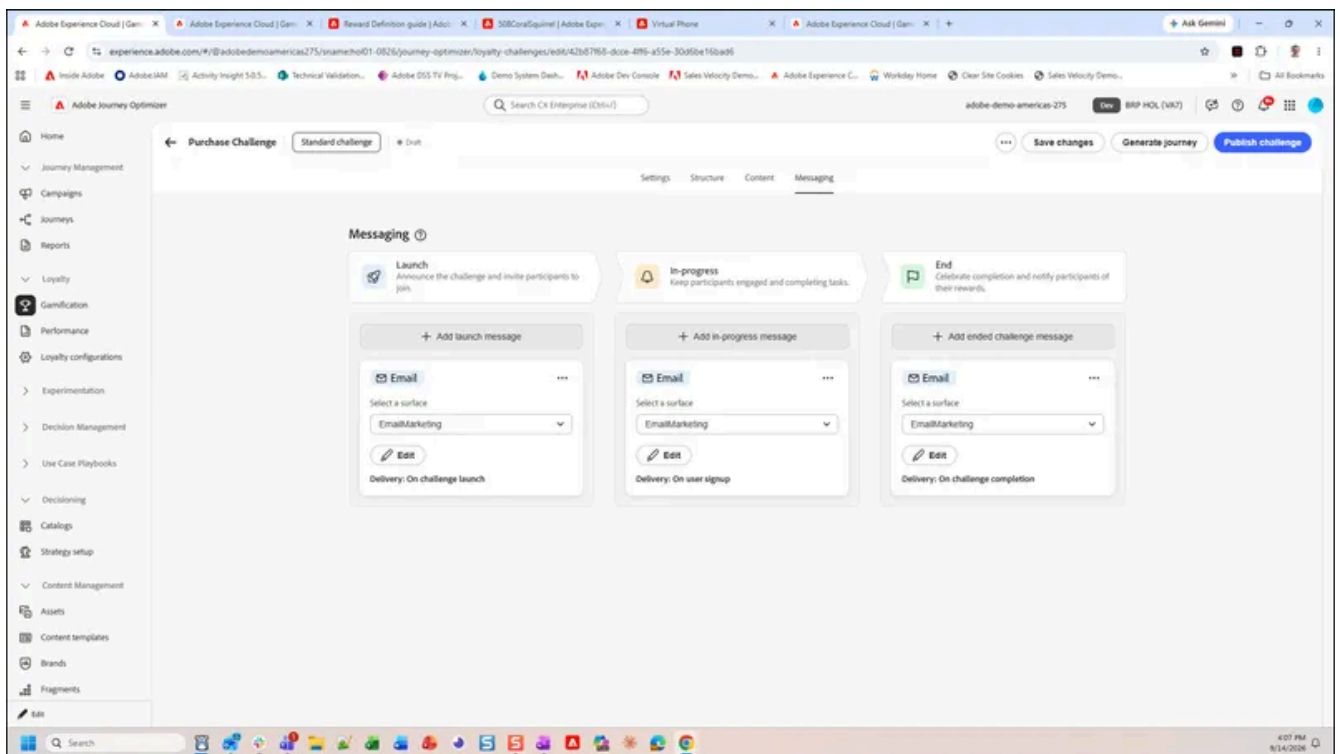
25. Click "Save Changes" to save your progress.
26. From the top list of tabs, move to the "Messaging" tab:
27. (NOTE: We will not be covering "Content" design in this session.



28.

29. For Messaging section, we will be adding a Message for each of the steps of our Challenge. This will include a "Launch Message", a "In-Progress Message" and a "End Message".

30.



31.

32. (NOTE: In this lab/exercise, we will not be configuring or designing message content. That would be covered under a Message Design lab in an AJO HOL.)

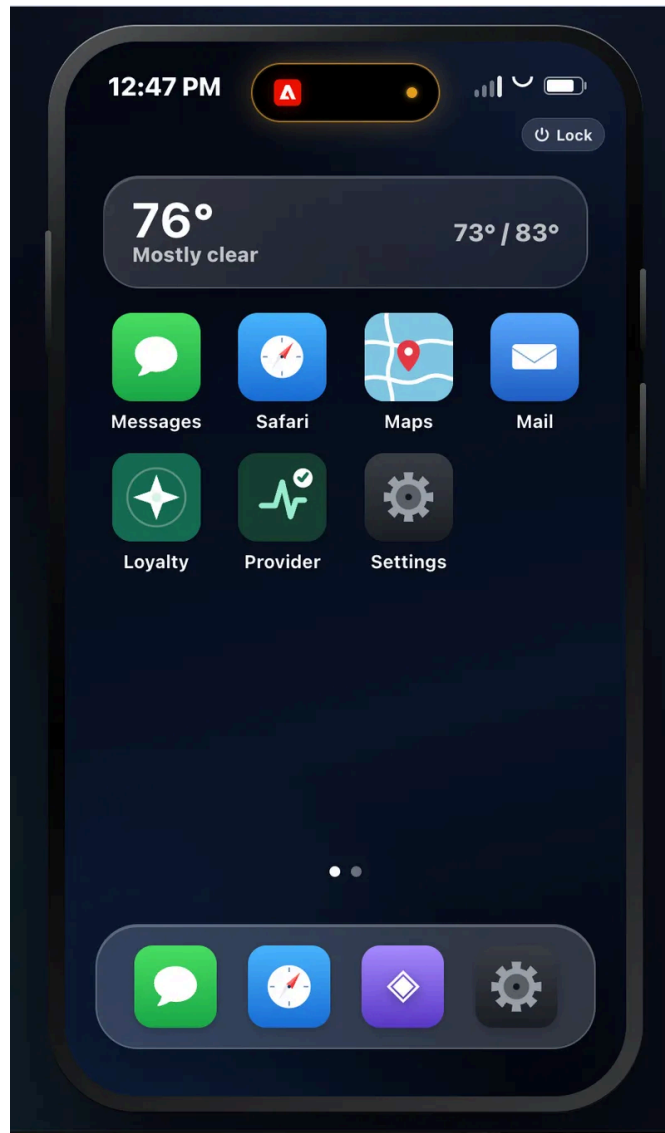
33. Once you have finished adding your messages, you can click on the "Publish Message" button to complete your Challenge Design.

34. End of Exercise.

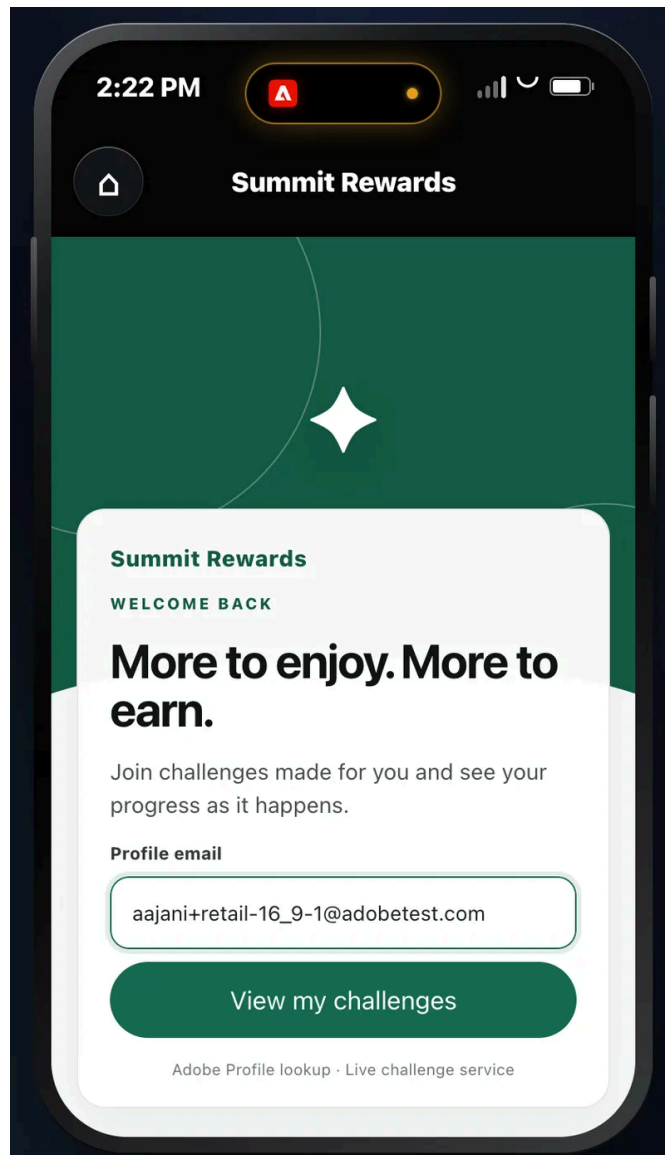
1.3. Test Your Challenge

Now that you have created your Task and Challenge, let's TEST IT OUT!

1. Navigate to the Mobile Application: <https://mobilesmsapp-f5d5cmaebad4cjhb.eastus2-01.azurewebsites.net/>
2. On the mobile device, open the Loyalty app.

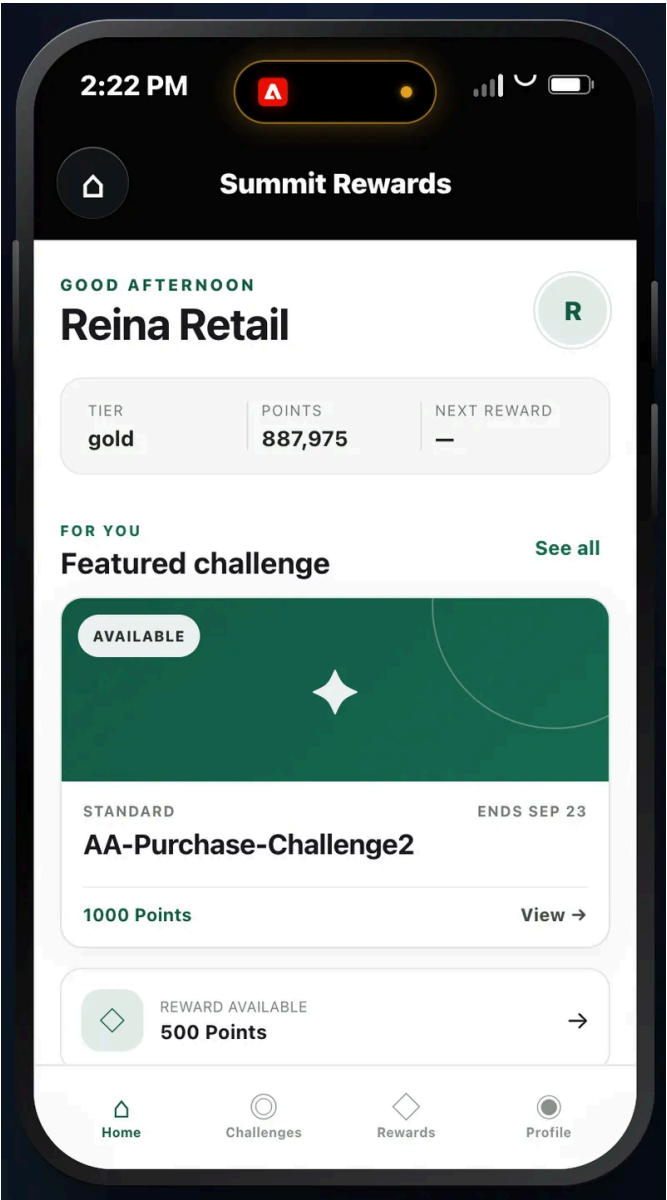


- 3.
4. Enter a profile email address (you can get a sample profile from your sandbox).



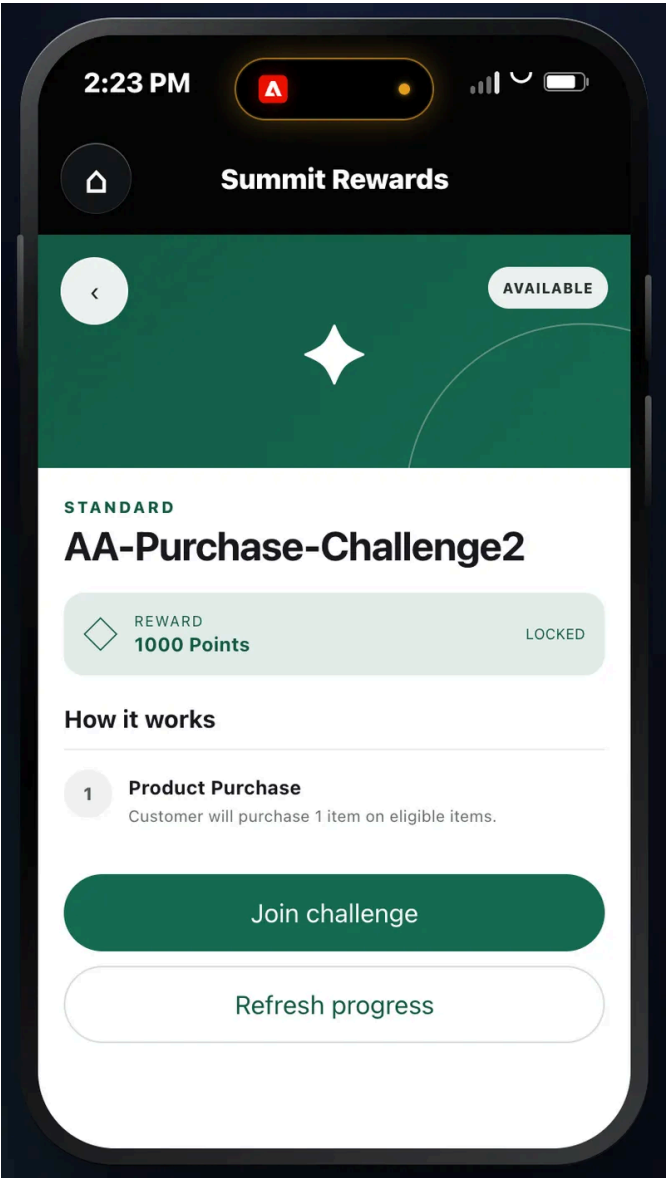
5.

6. Click View my Challenges to see available challenges.

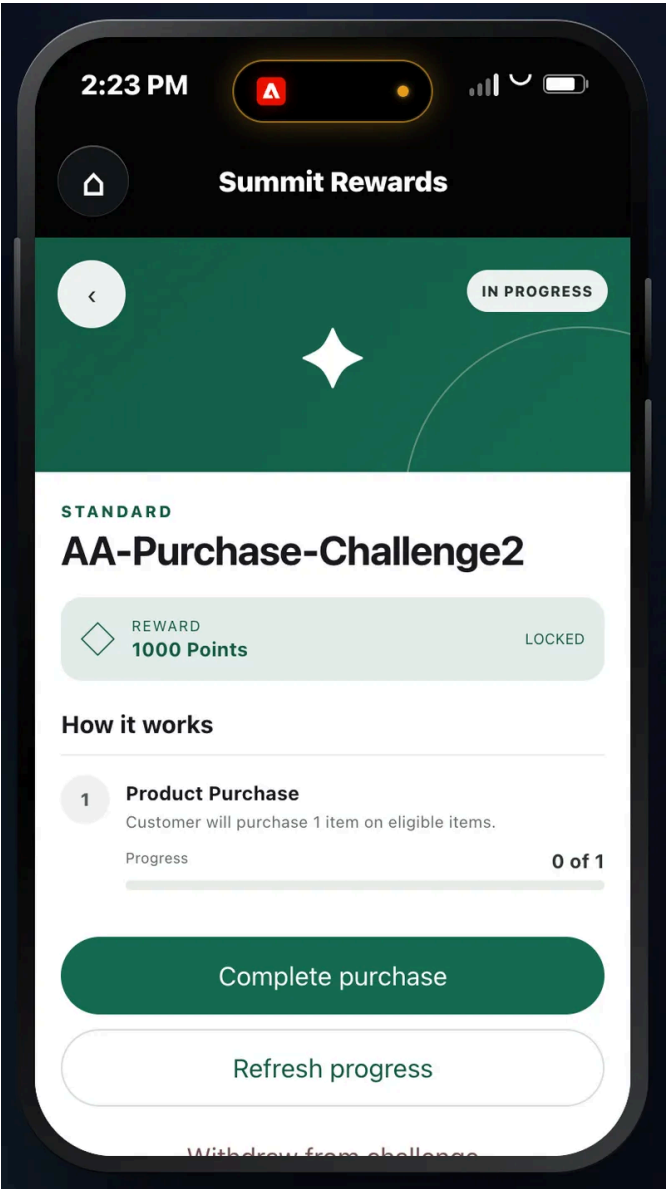


7.

8. Open a Challenge to view it. Then click Join Challenge.



- 9.
10. Perform the task(s) associate with the Challenge, in this case, Complete Purchase.



- 11.
- 12. Choose a product from the product inventory and then click Send Purchase Event.

2:23 PM







Summit Rewards

This sends one authenticated XDM purchase to Profile and one matching native event to Adobe Loyalty, then refreshes authoritative challenge progress.

Choose from product inventory OPTIONAL

Lono Yoga Short · MSH06 · \$32.00

Product SKU

MSH06

Product name

Lono Yoga Short

Quantity

1

Purchase total

32

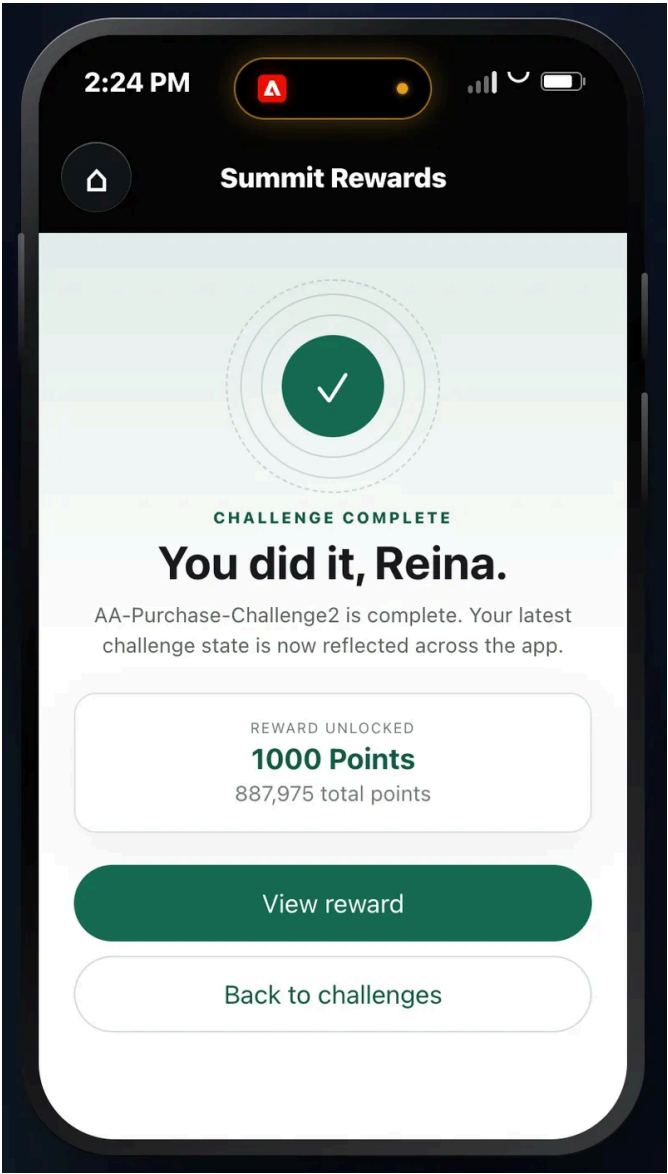
Challenge

AA-Purchase-Challenge2

Send purchase events

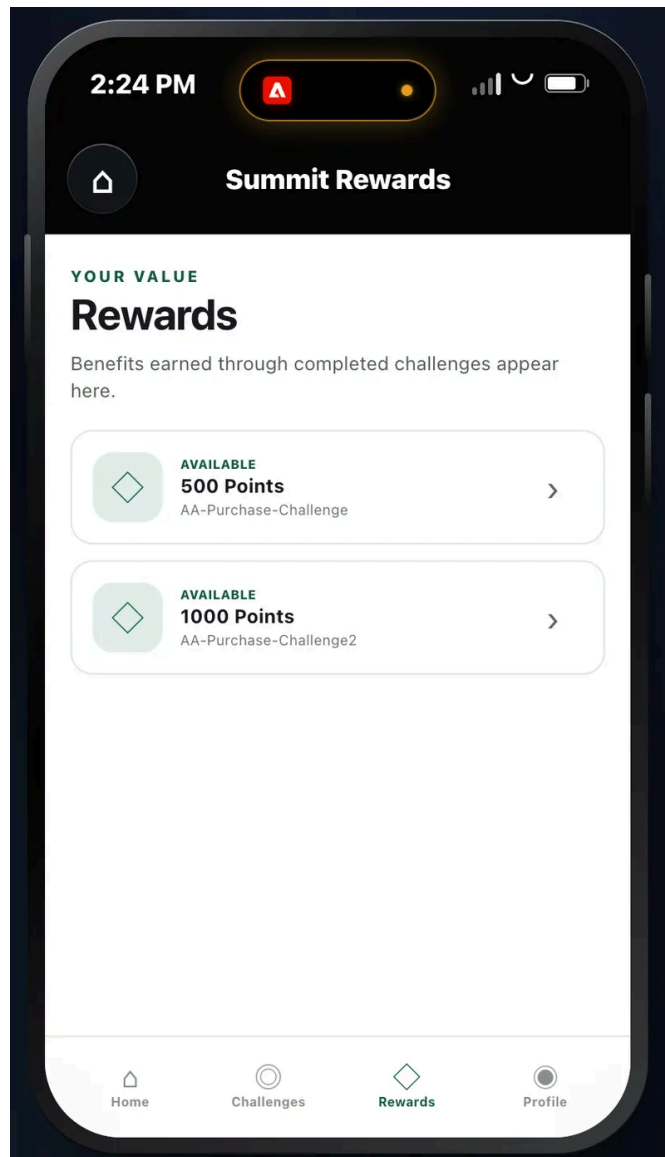
13.

14. Once the task(s) are completed, you'll see the Challenge Completed message.



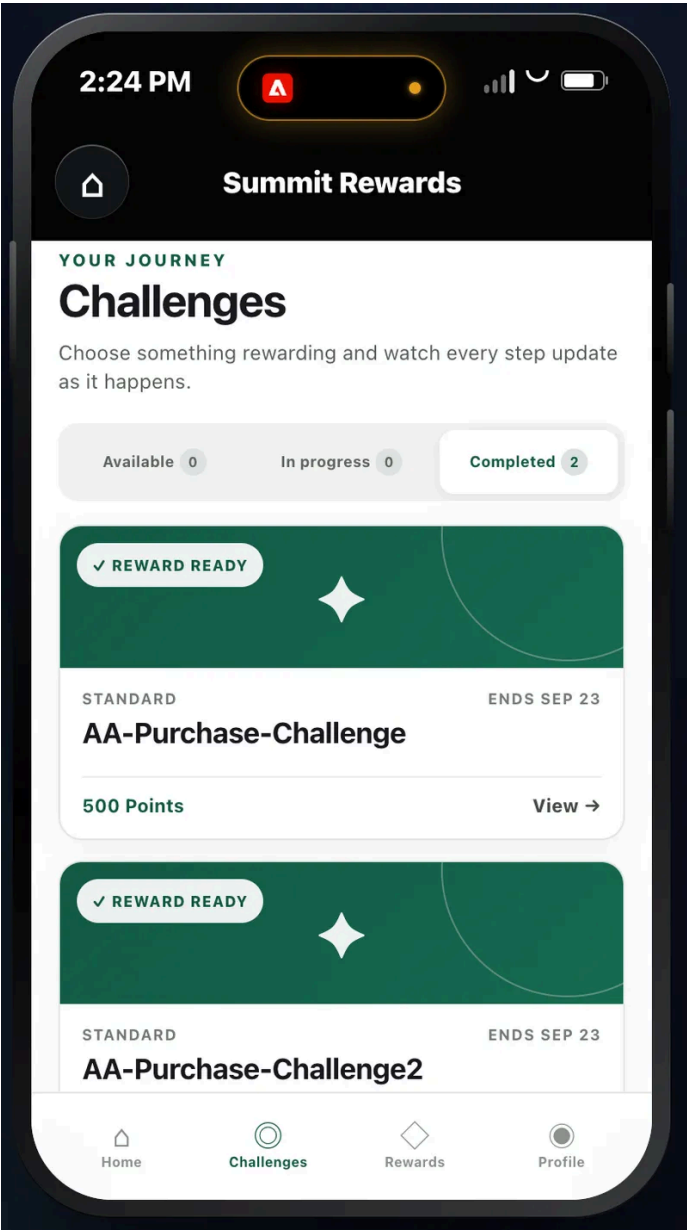
15.

16. Click on View Reward to see list of earned rewards.



17.

18. Click Challenges in the bottom menu to see all Available, In-Progress and Completed Challenges.



1.4. Lab Resources

Lab Recording, Resources & Survey

Your post-lab page for content, recording, helpful links to product documentation, and our survey.

Adobe Experience Platform Documentation

[AJO Loyalty Documentation](#)

Presentation Video

HOL Presentation

HOL Survey