2027 EXTOLE AI PROMPT GUIDE

for MARKETERS + DEVELOPERS

The prompts *real* teams use to automate offer management.

Explore 30 ready-to-use AI prompts to help you build, manage, optimize, and scale your customer offer programs in Extole. Prompts were chosen from real conversations with Ask Extole, our AI chat. To find a specific topic, please refer to the prompt directory below.

PROMPT DIRECTORY

30 prompts across five sections

BUILDING 1-6

1	Draft a Program	build
2	Reward an Action	build
3	Change a Reward	build
4	Reuse a Campaign	build
5	Update an Email	build
6	Match a Mockup	build

developer_mode 7-16

7	Build an Integration	cli
8	Backfill an Event	chat · ask
9	Audit Campaigns	mcp
10	Trace an Event	mcp
11	Find Failed Webhooks	cli
12	Test a Handler	cli
13	Check Email Health	cli
14	Look Up a Link	cli
15	Check Coupon Stock	cli
16	Trace a Coupon	cli

PERFORMANCE 17-22

17	Forecast the Quarter	ask
18	Project the Year	ask
19	Find What Changed	ask
20	Find What's Working	ask
21	Build a Report	ask
22	Chart a Trend	ask

STRATEGIZING 23-28

23	Check Your Offer	ask
24	Name Your Rivals	ask
25	Load Your Balance	ask
26	Plan Next Year	ask
27	Find a Test	ask
28	Plan a Promotion	ask

SUPPORT 29-30

29	Where's My Reward?	ask
30	Check a Reward	ask

ask or build = Ask Extole chat mode
cli or mcp = the developer tool the prompt pairs with.

Three ways to use Extole AI

Prompts work wherever you do. Manage your offer programs from My.Extole, your preferred AI tool, or your own codebase.

Ask Extole Chat

Built into every page of My.Extole. Prompt it in plain language without switching tools. Ask mode lets chat inspect programs, look things up, and pull reports; Build mode enables program edits; and Full access lets permissioned users publish drafts and issue rewards.

Extole MCP

Connect Extole to Claude, ChatGPT, Microsoft Copilot, and more. Run reports, check your setup, and make changes from the assistant you already use.

CLI + coding agents

Point Claude Code, Cursor, or Codex at Extole's CLI, MCP, and docs to build integrations and automate setup in your own codebase.

What Ask Extole draws on

Ask Extole answers from your live account (program setup, performance and event data, participant and reward records, and change history), plus Extole's help docs, web research, and anything you add in the chat. Each prompt card shows which of these sources it uses.

Program setup · Performance data · Reports · Event history · Participant data · Reward activity · Change log · Account context · Creative content · Help docs · Web research · Aa User input

EXTOLE

SECTION 01

Building

Edit campaigns, draft new programs, and update creative. Nothing goes live until you approve it.



Building a new campaign

Describe the program you want. Ask Extole drafts it in Flow Builder from first click to reward delivery and shows you each step before anything goes live.

PROMPT 1

Draft A Program

"Draft a holiday version of our refer-a-friend program with a $50 reward for advocates and referred friends."

Use it when you have a seasonal campaign idea and want a working draft today.

Follow ups:

- Switch out the creative for the attached files
- Change the target audience to loyalty program members
- Walk me through the draft step by step

DRAWS ON

Program setup · Help docs

PROMPT 2

Reward An Action

"Set up a reward-for-action program that gives members $25 for setting up direct deposit."

Use it when you want to reward a behavior, not just a referral.

Follow ups:

- What qualifying events does this program listen for?
- Add a reminder email after 14 days
- Set a 7-day pending period before rewards are issued

DRAWS ON

Program setup · Event history · Help docs

Ask Extole

"I drafted a reward-for-action program. Here's how a member moves through it."

Each step maps to an event in your account. Review the draft, then publish when you're ready.

OUTPUT

1. **Member opts in**
   From your email or app
2. **Sets up direct deposit**
   Event sent from your core
3. **$25 reward issued**
   After your pending period

Editing a campaign

Ask Extole edits your campaign as a draft using your real setup. Publishing needs Full access, and the chat always asks before it does.

PROMPT 3

Change A Reward

"Update the advocate reward for our refer-a-friend campaign to $50."

Use it when an offer changes and you want to update every place it appears.

Follow ups:

- Show me every place the old amount appears
- Preview the updated share email
- Publish the changes (chat needs Full access mode)

DRAWS ON

Program setup

Creative content

Change log

PROMPT 4

Reuse A Campaign

"Duplicate our spring referral campaign and change the target audience to top advocates only."

Use it when you want a targeted campaign without rebuilding from scratch.

Follow ups:

- Set it to start June 1
- Change the advocate reward to $40 for every successful referral
- Create a bonus $25 reward that triggers after 3 successful referrals

DRAWS ON

Program setup

Change log

Ask Extole

"I'll prepare the advocate reward as a $50 USD store credit, replacing its current $20 credit, and update any advocate-facing amount copy in the draft."

Based on a real conversation. Nothing went live until the client confirmed.

OUTPUT

Draft updated Review

- ✓ Advocate reward $20 → $50
- ✓ Share email and landing page amounts updated
- ✓ Waiting for your approval to publish

Editing creative assets

Ask Extole edits your real emails, landing pages, and share experiences. Attach a design file and it can rebuild a page to match.

PROMPT 5

Update An Email

"Rewrite the subject line of our reward email so it mentions the $50 reward."

Use it when copy needs to change and you don't want to wait on a ticket.

Follow ups:

- Give me three more subject line options
- Update the preheader to match
- Show me a preview

DRAWS ON

Creative content

Program setup

PROMPT 6

Match A Mockup

"Rebuild our welcome landing page to match the attached mockup."

Use it when you have a new design and want it live in your program.

Follow ups:

- Apply it only to the embedded view
- Make the button text editable in the campaign editor
- What still doesn't match the mockup?

DRAWS ON

Help docs

Creative content

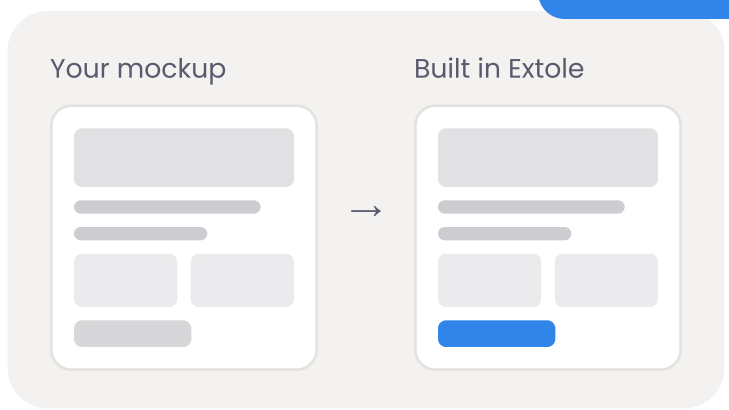
Aa User input

OUTPUT

Ask Extole

"I rebuilt the hero, icons, sign-up cards, and fine print to match your mockup. One note: the rate date in the mockup looks out of date."

From a real conversation. It caught a legal detail instead of copying it.

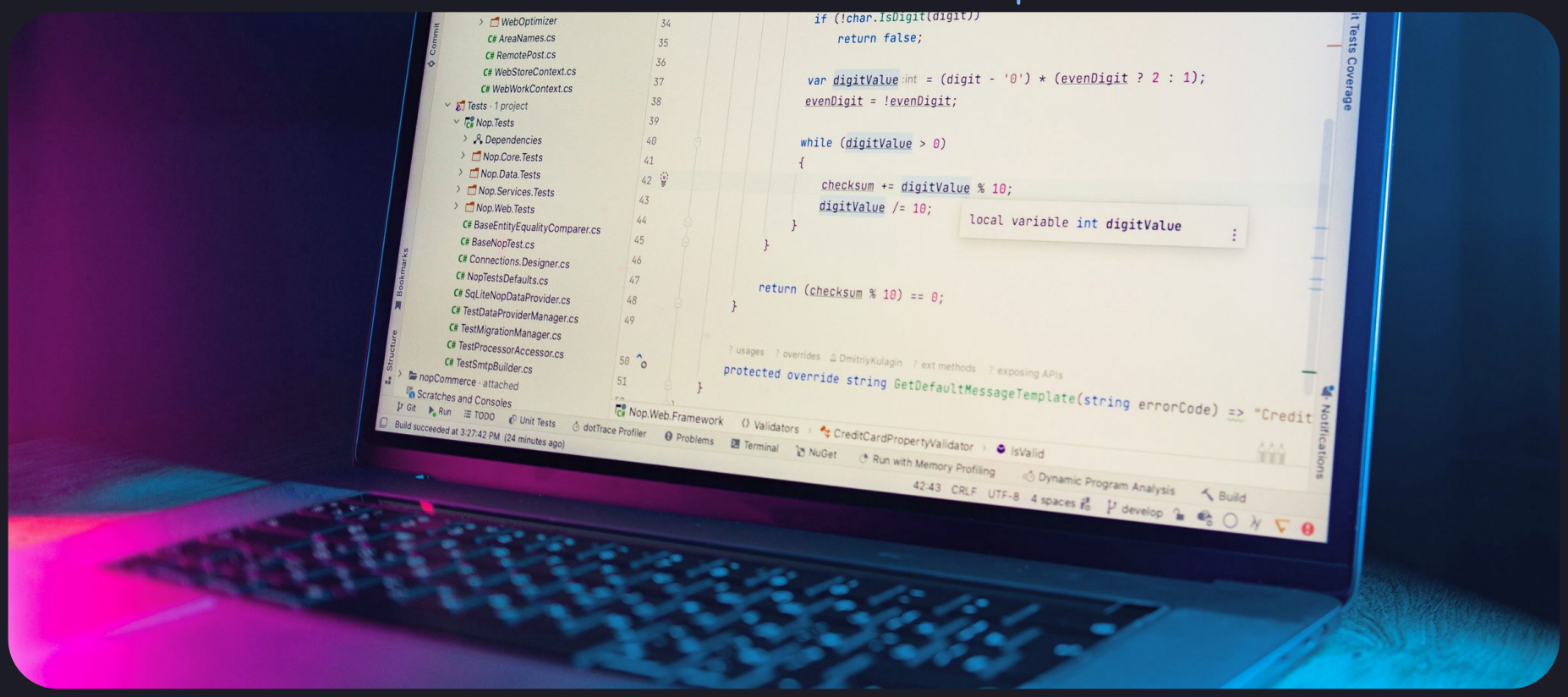


EXTOLE

section_02

Developer mode

Build integrations, test events, and inspect your setup from the tools you already code in.



Building and testing integrations

Point a coding agent at the Extole MCP, CLI, and developer docs. It works under your own Extole permissions, and every change it makes is recorded in the change log.

PROMPT 7

Build An Integration

"Build a connector that sends purchase events from our checkout to Extole. Test it in our sandbox first."

`claude code + cli`

Use it when your platform needs to send activity into Extole.

Follow ups:

- What fields does Extole require?
- Write tests for the purchase event
- Show me what changed in the sandbox

DRAWS ON

Help docs · Account context · Change log

PROMPT 8

Backfill An Event

"A member's top-up never reached Extole. Show me the event and fields our campaign expects so I can resend it."

`extole chat · ask`

Use it when an event was dropped and a member is waiting on a reward.

Follow ups:

- Which reward will this event trigger?
- Confirm it was received
- Are other top-ups missing this week?

DRAWS ON

Program setup · Event history · Help docs

Ask Extole

"Here's the event your campaign expects, with the fields it checks. Send it and I'll confirm it was received."

Chat reads your live campaign setup, so the answer uses your real event name and fields, not a generic example.

OUTPUT

topup-event.json

```
// event your campaign listens for
{
  "event_name": "user.topup",
  "email": "member@example.com",
  "data": {
    "topup_id": "TU-48213",
    "amount": 50.00
  }
}
```

Inspecting and testing setup

Connect the Extole MCP to Claude Code or Cursor and query your live configuration like any other part of your stack.

PROMPT 9

Audit Campaigns

"List every campaign that listens for our purchase event and flag any with a different reward rule."

`claude code + mcp`

Use it when you're about to change an event and need to know what depends on it.

Follow ups:

- Show me the rule that differs
- Which of these campaigns are live?
- When was each one last changed?

DRAWS ON

Program setup · Change log

PROMPT 10

Trace An Event

"Send a test purchase event in our sandbox and tell me each step it triggers."

`cursor + mcp`

Use it when you're testing a new integration before it goes live.

Follow ups:

- Why is the advocate reward pending?
- Run it again with a different email
- Show me the raw event

DRAWS ON

Event history · Reward activity

✦ Extole MCP

"Here's every step your test purchase triggered in the sandbox, including the reward that's still pending."

Pending periods come from your reward rules, so you can see exactly when the advocate reward will issue.

OUTPUT

```
sandbox · test purchase

✓ event received
✓ friend matched to advocate
✓ qualifying purchase
✓ friend reward issued
… advocate reward: pending 30 days
```

Debugging webhooks

The CLI shows every webhook dispatch and the response your system sent back, so an agent can find a failing handler in minutes.

PROMPT 11

Find Failed Webhooks

"Our CRM stopped receiving reward webhooks yesterday. Show me the failed dispatches and the errors they returned."

`claude code + cli`

Use it when data stops arriving in a downstream system.

Follow ups:

- Which campaign events use this webhook?
- Show me recent integration alerts
- Resend the failed events once fixed

DRAWS ON

Event history · Account context · Help docs

PROMPT 12

Test A Handler

"Temporarily send our share events to this URL so I can test our new handler, then show me each response."

`extole cli`

Use it when you're building or changing the system that receives Extole data.

Follow ups:

- What does a share event payload include?
- Send a sample event through it
- Remove the test hook when I'm done

DRAWS ON

Event history · Help docs

✦ Extole CLI

"Your CRM endpoint started returning 401 errors at 2:14 p.m. yesterday. Every dispatch since then has failed."

The CLI reads dispatch history and HTTP responses, so the answer points to the exact failure. Illustrative data.

OUTPUT

```
webhooks · dispatch results

✓ 10:02  200 OK
✓ 13:41  200 OK
✗ 14:14  401 Unauthorized
✗ 14:15  401 Unauthorized
✗ +37 more since 14:14
```

Checking domains and share links

Check email authentication and look up share links from the terminal before a launch or when something looks off.

PROMPT 13

Check Email Health

"Check SPF, DKIM, and DMARC for mail.ourbrand.com and tell me what's missing before we launch."

`claude code + cli`

Use it when you're sending Extole emails from a new domain.

Follow ups:

- Provision DKIM keys for that domain
- Is our program domain resolving?
- Explain what each record does

DRAWS ON

Account context · Help docs

PROMPT 14

Look Up A Link

"Who owns share code SPRING-4KD2, and which program is it in?"

`extole cli`

Use it when a customer sends you a link that isn't working.

Follow ups:

- List every share link for this person
- Show their referral history
- Has anyone converted from this link?

DRAWS ON

Participant data · Program setup

✨ Extole CLI

"mail.ourbrand.com passes SPF, MX, and DMARC. DKIM isn't set up yet. Want me to provision keys?"

The agent runs the real DNS checks before it raises a warning. Provisioning keys changes your account, so it asks first.

OUTPUT

```
health · mail.ourbrand.com

✓ SPF    pass
✓ MX     pass
✓ DMARC  pass
✗ DKIM   no key found
```

Managing coupons and rewards

Monitor coupon code balance, generate new coupon batches, and inspect a reward status without clicking through screens.

PROMPT 15

Check Coupon Stock

"How many codes are left in our holiday coupon batch, and when will we run out at the current pace?"

`claude code + cli`

Use it when you issue coupon codes and can't afford to run out mid-campaign.

Follow ups:

- Upload this new batch of codes
- Which campaigns use this supplier?
- Show reward counts by state this month

DRAWS ON

Reward activity · Program setup

PROMPT 16

Trace A Coupon

"Who received coupon code HOLIDAY-7F3K, and has it been redeemed?"

`extole cli`

Use it when a customer says their code doesn't work.

Follow ups:

- Show that reward's full history
- Was it canceled or resent?
- Generate a new coupon code and deactivate the old one

DRAWS ON

Reward activity · Participant data

Extole CLI

"Your holiday coupon batch has 1,240 codes left. At this month's pace, that lasts about four weeks."

Inventory counts and depletion warnings come straight from Extole or your chosen reward supplier. Illustrative data.

OUTPUT

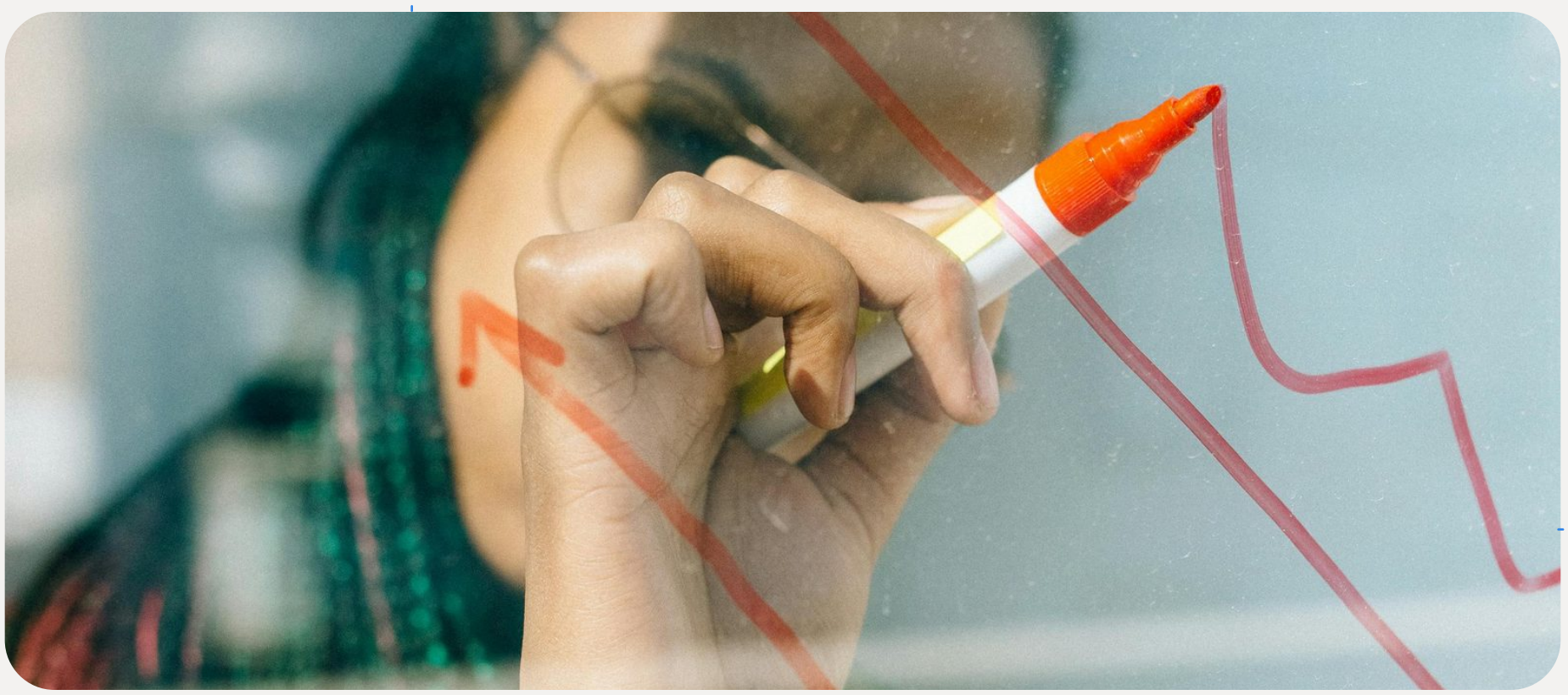
codes_left	used_per_week
1,240	~310
runs_out_in	supplier
~4 weeks	Coupon codes

EXTOLE

SECTION 03

Performance

Diagnose what changed, pull the reports you need, and forecast what's next.



Forecasting performance

Forecasts use your program's weekly history. Ask Extole learns your seasonal highs and lows and accounts for recent jumps, like a new placement.

PROMPT 17

Forecast The Quarter

"Forecast advocates and conversions for our refer-a-friend program next quarter. Account for the holidays."

Use it when you're setting targets or a budget. You get a best estimate and a likely range.

Follow ups:

- What's the low end of the range?
- Turn this into a reward budget plan
- Show it as a weekly chart

DRAWS ON

Performance data · Event history

PROMPT 18

Project The Year

"How many advocates will we have by the end of the year at our current pace?"

Use it when you're reporting progress against an annual goal.

Follow ups:

- How far are we from our annual goal?
- What would it take to reach [X] advocates?
- Which program is growing fastest?

DRAWS ON

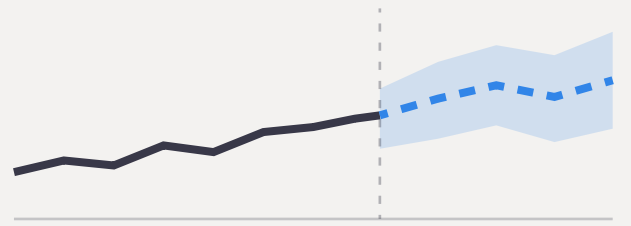
Participant data · Performance data

OUTPUT

Ask Extole

"Here's where your advocate count is likely to land by year end, with a best estimate and a likely range."

After a forecast, chat offers to turn it into a reward budget plan.



Diagnosing changes

Ask Extole answers from your own program data: the reports, funnel steps, and change history you see in My.Extole.

PROMPT 19

Find What Changed

"Why did referral conversions drop last week compared with the week before?"

Use it when a number moves and you need the cause before your next meeting.

Follow ups:

- What stage in the referral journey saw the biggest drop off?
- Pull YTD conversions by week
- What optimizations can we make to reverse this drop?

DRAWS ON

Change log · Performance data

PROMPT 20

Find What's Working

"Which share channels drove the most new members this month?"

Use it when you want to invest in the channels that are driving results.

Follow ups:

- Give me a full breakdown of clicks, shares, and conversions across all channels
- What promotional placements are live in each channel?
- How can we boost SMS shares?

DRAWS ON

Reports · Program setup

Ask Extole

"I'm comparing Refer a Friend conversions for Oct 5–11 against Sep 28–Oct 4, along with the earlier steps in the friend journey."

Chat shows its work and won't name a cause until the numbers are in. From a real conversation, lightly shortened.

OUTPUT

Open

Full Funnel Report - 9/28-10/11

Pulling reports

Ask for the report in plain language. Chat picks the report type, sets the dates and filters, and explains what it counted.

PROMPT 21

Build A Report

"Create a report of rewards issued in September, broken out by program and channel."

Use it when you need numbers for a recap and don't want to configure a report by hand.

Follow ups:

- Add a column for total reward value
- Compare it with August
- Give me this as a CSV

DRAWS ON

Reports · Reward activity · Program setup

PROMPT 22

Chart A Trend

"Graph our monthly loyalty program signups for this year so far."

Use it when you need a chart for a deck or a quick read on momentum.

Follow ups:

- Add last year as a second line
- Which month had the highest growth, and why?
- Break out signups by promotional channel

DRAWS ON

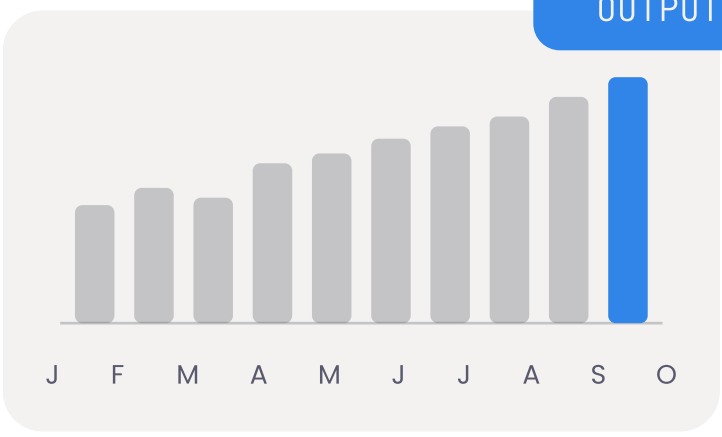
Reports · Performance data

Ask Extole

"Here's a chart of your loyalty signups by month for this year."

Ask Extole runs the report, charts it in the conversation, and says exactly which dates and steps it counted.

OUTPUT



EXTOLE

SECTION 04

Strategizing

Benchmark your offer, budget your rewards, and find your next idea.



Benchmarking your offer

Ask Extole reads your live reward setup and compares it with public referral offers from comparable brands, or the competitors you name.

PROMPT 23

Check Your Offer

"Is our referral reward competitive? Compare it with similar brands in our market and chart the results."

Use it when you're about to change an offer and want to see where you rank.

Follow ups:

- Make a chart showing where we rank among similar brands
- Update the reward in our Evergreen RAF campaign to $50 (uses Build mode)

DRAWS ON

Web research · Program setup

PROMPT 24

Name Your Rivals

"Compare our referral offer with [Competitor A] and [Competitor B]. Who offers more, and to whom?"

Use it when you already know who your competitors are.

Follow ups:

- Show me all the rewards we've offered in the past and the conversion rate for each one
- Create an A/B test with our current welcome offer and a $100 variant

DRAWS ON

Aa User input · Web research · Program setup

Ask Extole

"Here's a chart showing your advocate reward vs. comparable brands."

In a real conversation, a credit union client used this data to raise its referral reward to $150, matching competitors.

OUTPUT



Budgeting rewards

Ask Extole adds up what your rewards cost by supplier over the past year, sets aside extra for busy months, and counts rewards still waiting to be issued.

PROMPT 25

Load Your Balance

"How much should we load into our reward balance for Q4, and when should we top it up?"

Use it when you want rewards to keep flowing through busy months.

Follow ups:

- When will our current balance run out?
- How much is still pending?
- Split the deposit by reward supplier

DRAWS ON

- Reward activity
- Account context

PROMPT 26

Plan Next Year

"What will our rewards cost next year, by month and by reward supplier?"

Use it when you're building next year's budget based on historic data.

Follow ups:

- Which months cost the most last year?
- What if our referral conversion rate increases by 20% from 2026?
- Show it as a monthly chart

DRAWS ON

- Reward activity
- Event history
- Program setup

Ask Extole

"Here's your Q4 plan: what to deposit, when, and where to set your low-balance alert."

Ask Extole also tells you how many weeks your current balance will last.

OUTPUT

Q4 deposit $12000	Deposit every 2 wks
Balance lasts 6 wks	Alert at $3000

Ideating new campaigns

Ideas come from your own results, not a generic list. Ask Extole looks at what your program's numbers say before it suggests anything.

PROMPT 27

Find A Test

"What could we test to increase loyalty program signups in Q4?"

Use it when results have leveled off and you want a next experiment, or when launching a brand-new offer program format.

Follow ups:

- Which idea has the biggest upside?
- What metrics should we track to measure success?
- Draft the first test as a campaign targeting new customers

DRAWS ON

Performance data · Help docs

PROMPT 28

Plan A Promotion

"Suggest three holiday offers for our members based on what performed best last year."

Use it when you're planning a seasonal push and want ideas grounded in your data.

Follow ups:

- What reward amount would you recommend starting with?
- Who should we target first?
- Draft the first offer as a new campaign titled "Holiday Burst 27"

DRAWS ON

Performance data · Event history · Help docs

Ask Extole

"Here are three holiday ideas, each tied to what worked for you last year."

Ask a follow-up and the chat can draft any of these as a campaign using Build mode.

OUTPUT

Holiday ideas

1. Double rewards for the first two weeks of December
2. Bonus rewards for top advocates
3. A New Year's reminder email to past advocates

EXTOLE

SECTION 05

Support

Answer reward questions and fix issues without opening a ticket.



Resolving reward questions

Ask Extole looks up the person, their referral journey, and the rules that applied, then explains what happened in plain language so you can take action.

PROMPT 29

Where's My Reward?

"Why didn't jordan@example.com get her referral reward?"

Use it when a member asks about a missing reward.

Follow ups:

- Show me the rule that blocked it
- List all other referrals in the last 30 days that failed the same way
- Bypass rules and issue Jordan's reward (needs Full access)

DRAWS ON

Participant data

Reward activity

Program setup

PROMPT 30

Check A Reward

"Has this member been sent their reward, and have they used it?"

Use it when you need a quick answer while a member is on the line with support.

Follow ups:

- Show me every reward she's earned
- Did her friend receive a reward?
- Pull up a list of other friends she referred and the status of those referrals

DRAWS ON

Participant data

Reward activity

Ask Extole

"The friend opened the account with a different email than the one your member referred. Should I connect them and issue both $100 rewards?"

Based on a real conversation at a credit union. One question, two rewards issued, no ticket.

OUTPUT

Questions asked	Rewards issued
1	2 × $100
Support tickets	**Checked**
0	Both paid

See what Extole AI can build for *you*.

Ready to test out AI-powered offer management? Bring our sales team a question you'd ask about your own program. We'll answer it live during the demo.

Book a demo

Request a sandbox

EXTOLE

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