REWARDS GENIUS™

by Tango Card

Rewards Genius for Salesforce App: Set-Up Guide

BEFORE YOU START

REWARDS GENIUS™ by Tango Card

What is Rewards Genius?

Rewards Genius is the self-serve portal that powers your Salesforce app, making it possible to automatically or manually send e-gift cards directly from your Salesforce instance within the sales or service cloud. Rewards Genius is powered by Tango Card.

What happens first?

Prior to using this guide, you'll need to take three steps:

1. Download the Rewards Genius for Salesforce app from Salesforce AppExchange.
2. Sign up for a free Rewards Genius account.
3. Email us to get access to your API keys within your Rewards Genius account.

What's covered here?

This guide covers important terminology before walking you through how to set up manual and automatic programs using the Rewards Genius for Salesforce app. It also shows how you'll manage incentives in Rewards Genius. Please don't hesitate to email us if you have any questions beyond what's covered in this guide.

KEY DEFINITIONS

To help you get the most out of this set-up guide, we've provided automatic- and manual-program definitions and examples:

Manual Programs

Definition: A reward program that enables Salesforce users to send ad-hoc rewards.

Example: "As part of our referral marketing efforts, I want my sales team to be able to send $100 digital gift cards to customers that refer new accounts." Create a manual program to enable sales team members to send referral rewards directly from their Salesforce instance whenever the need arises.

Automatic Programs

Definition: A reward program that's triggered by a predefined set of rules or process within Salesforce.

Example: "I want to send a $50 Amazon.com e-gift card to new customers." Set lead conversion as the trigger and then simply add an action for the App to automatically send the potential customer a $50 Amazon.com e-gift card on a branded email template.

For more about creating automated processes using Process Builder, check out the Salesforce help article.

CONNECT REWARDS GENIUS TO SALESFORCE

CONNECT REWARDS GENIUS TO SALESFORCE (1/6)

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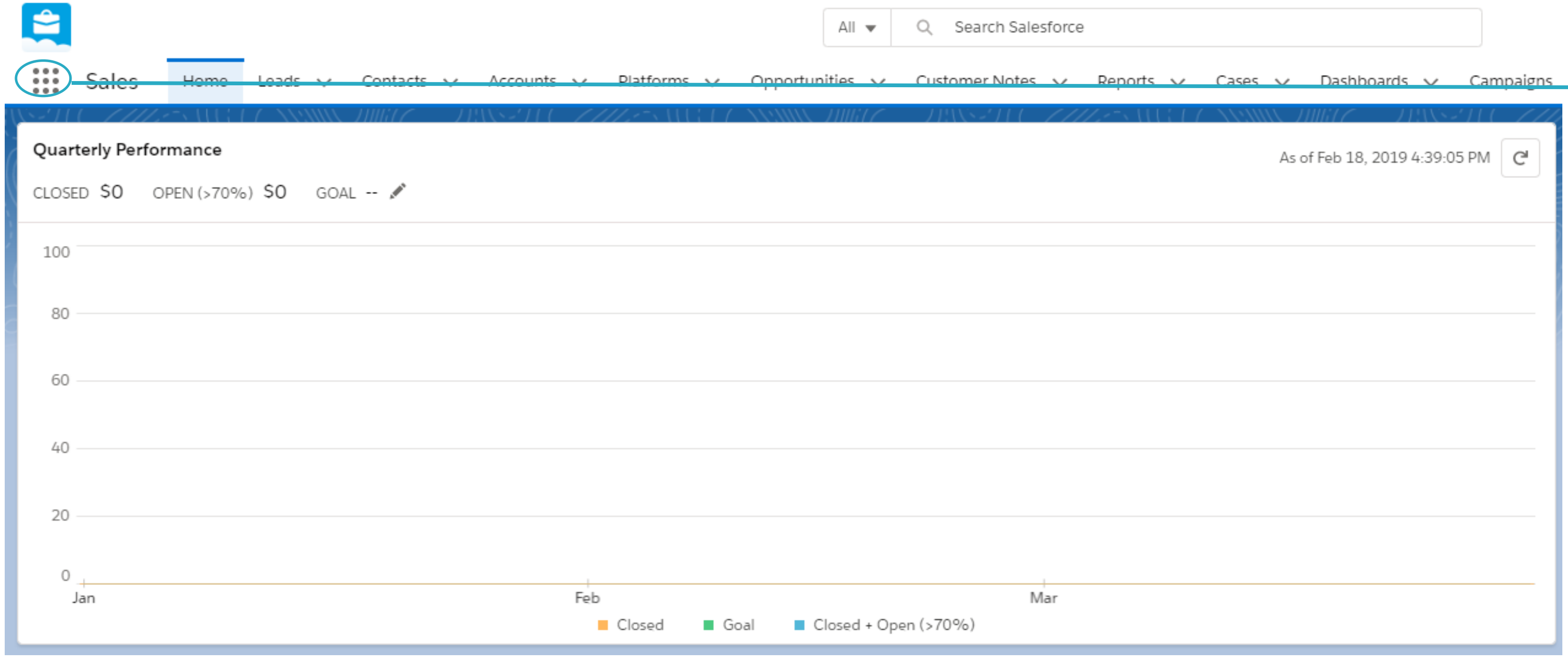
Open the AppLauncher within Salesforce.



1. Click the dialpad to open the AppLauncher.

CONNECT REWARDS GENIUS TO SALESFORCE (2/6)

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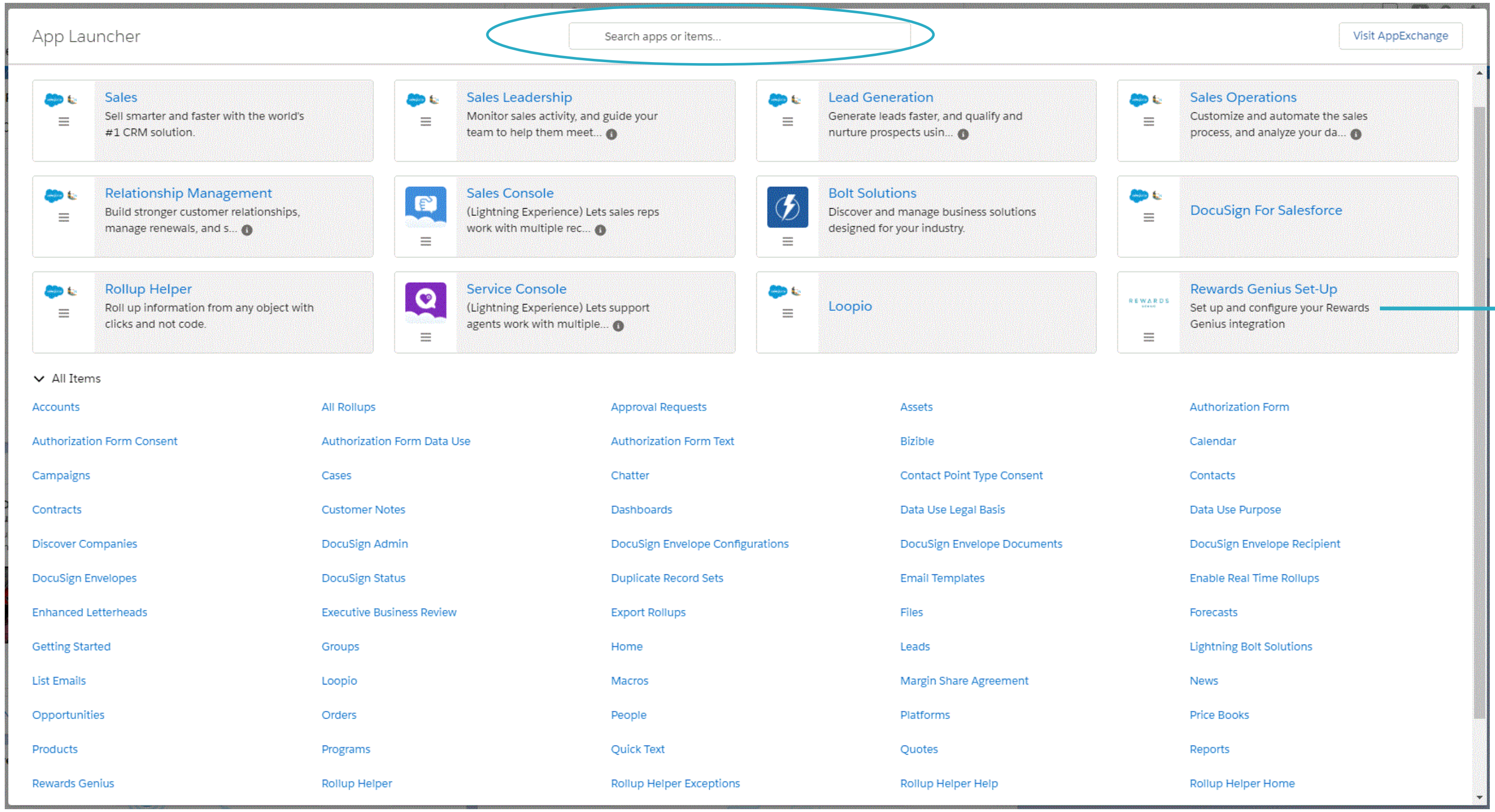
Enter Rewards Genius into the search bar. When it appears, open the Rewards Genius Set-Up.

1. Enter **Rewards Genius**.



2. Click **Rewards Genius Set-Up**.

CONNECT REWARDS GENIUS TO SALESFORCE (3/6)

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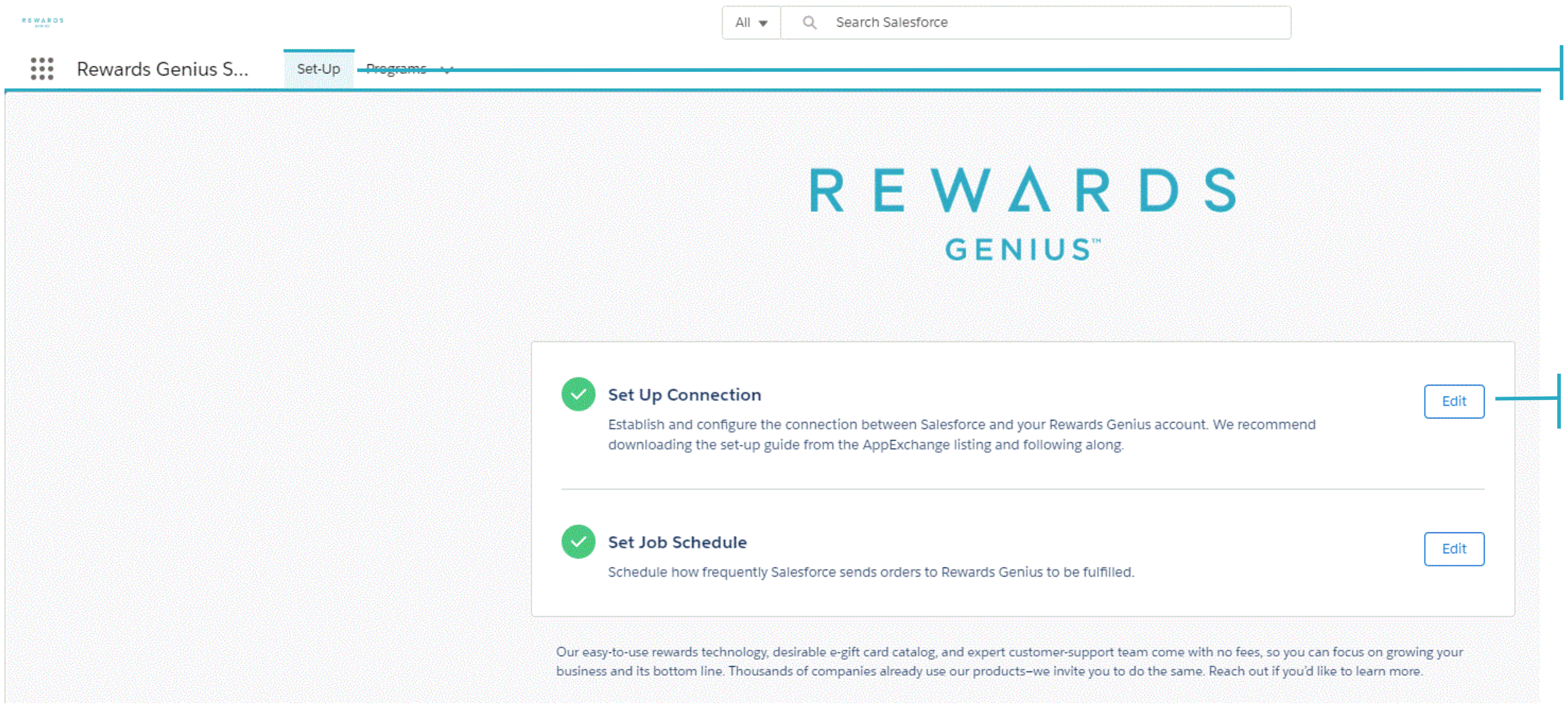
Finish setting up the connection between Rewards Genius and Salesforce.

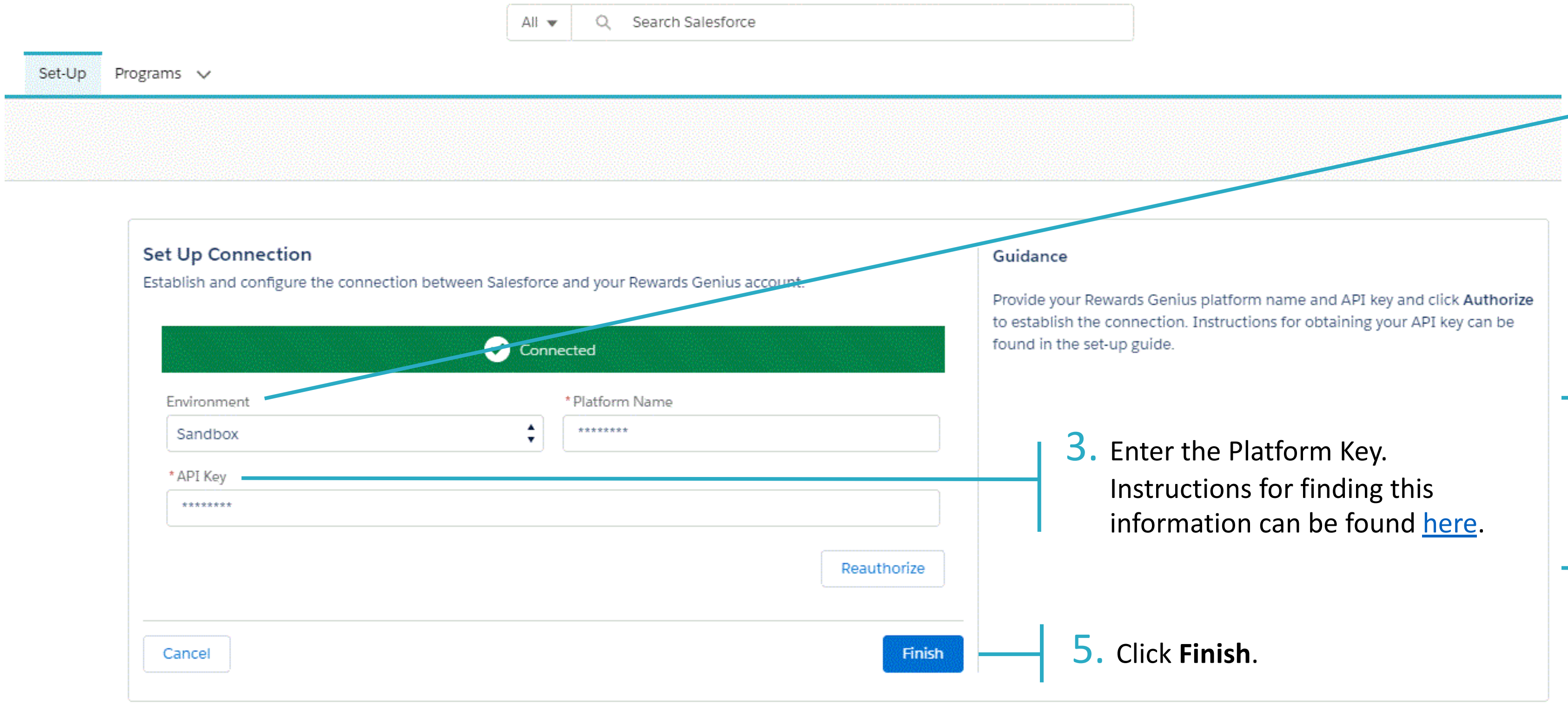


1. Click the **Set-Up** tab.
2. Click **Edit**.

CONNECT REWARDS GENIUS TO SALESFORCE (4/6)

Enter your Rewards Genius Platform Name and Key to connect the app to your Rewards Genius account.

Note: If you haven't already spoken with a Rewards Genius representative, email us to get access to your Platform Key.



1. Choose either a Sandbox or Production environment. This applies to Rewards Genius not Salesforce. *Note*: Using the production environment will result in rewards being sent using actual funds.
2. Enter the Platform Name found within your Rewards Genius account.
3. Enter the Platform Key. Instructions for finding this information can be found here.
4. Click **Authorize/Reauthorize**.
5. Click **Finish**.

CONNECT REWARDS GENIUS TO SALESFORCE (5/6)

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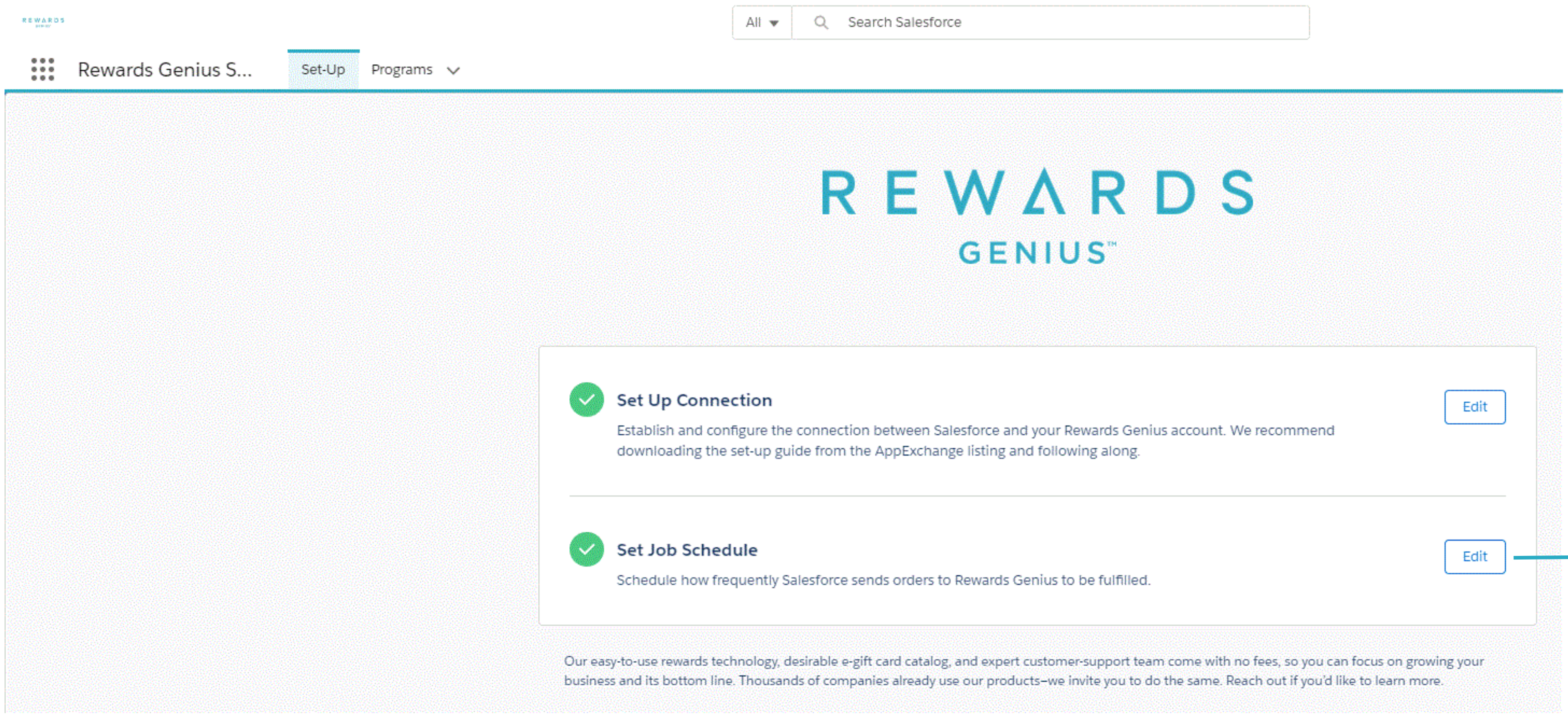
Let Salesforce know how often to send rewards through the App by setting your preferred Job Schedule.

Note: All programs created using the App will send rewards on the cadence you set here.



Click **Edit**.

CONNECT REWARDS GENIUS TO SALESFORCE (6/6)

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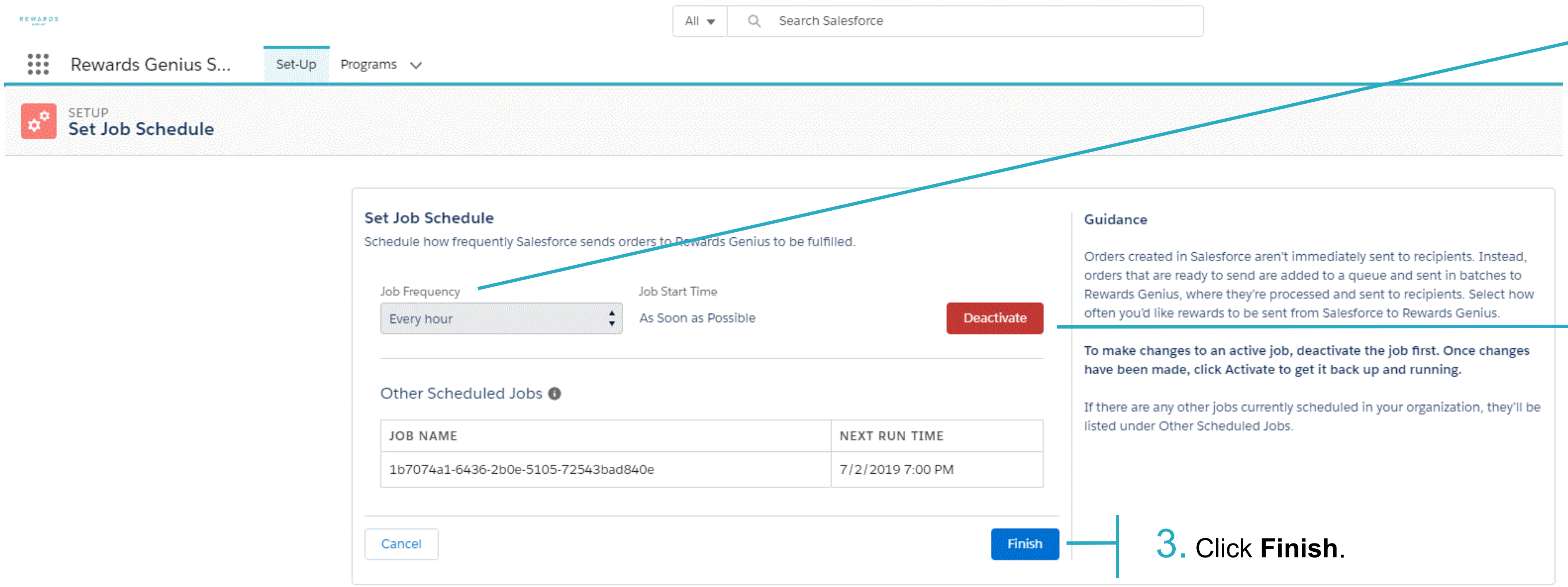
Choose the job frequency that works best for your rewards programs. This can be changed at any time.



1. Choose a job frequency and start time that works for your program.

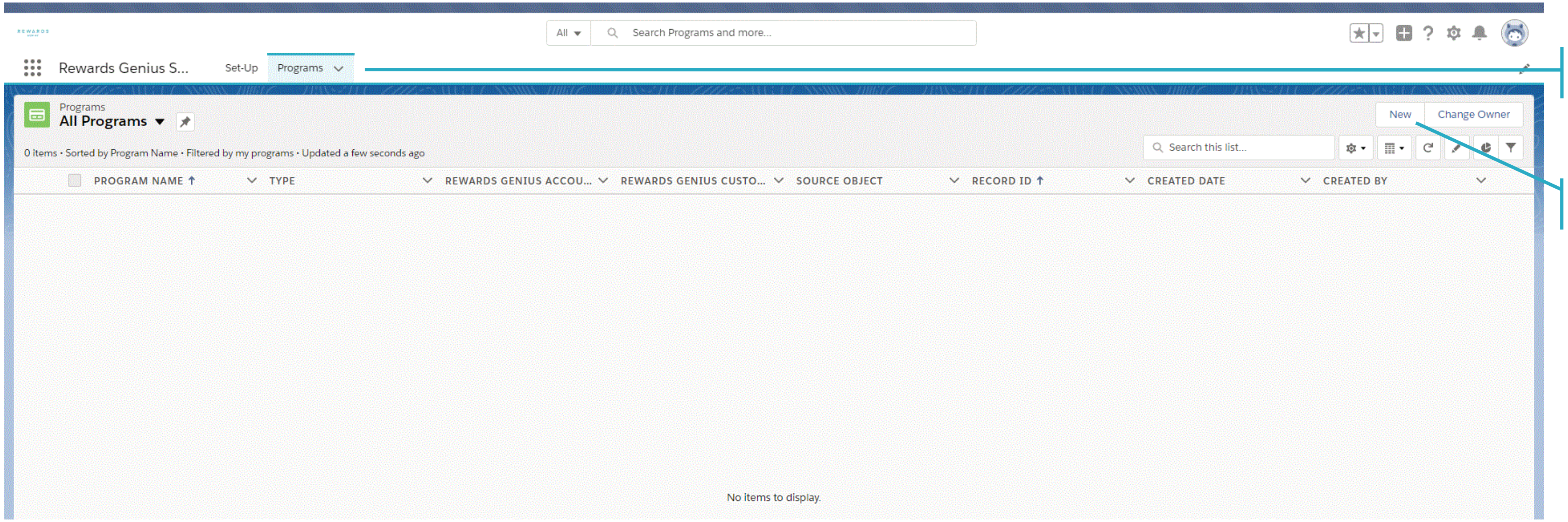
2. Click **Activate/Deactivate**.

3. Click **Finish**.

MANUAL PROGRAM SET-UP

MANUAL PROGRAM SET-UP (1/6)

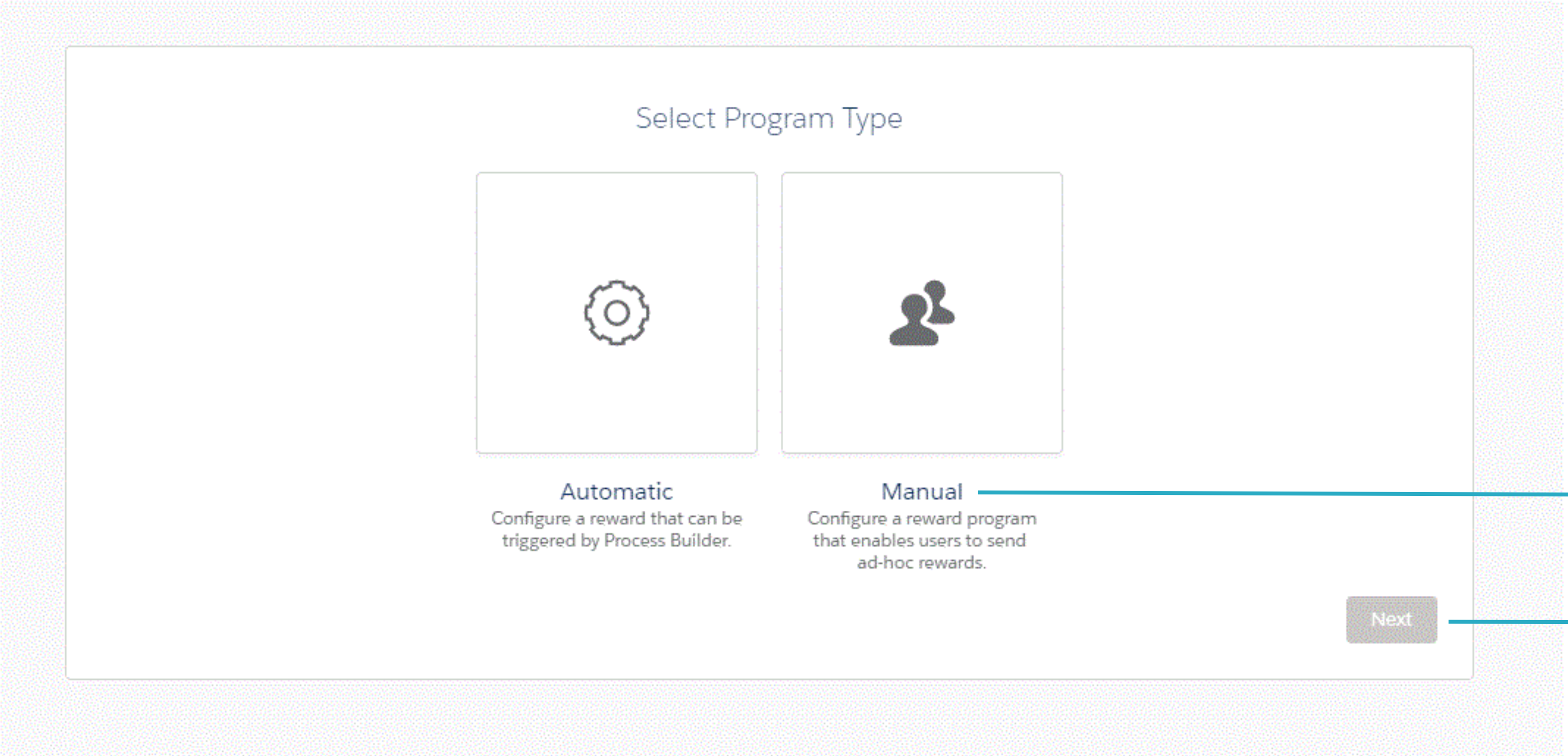
Once Salesforce is connected to Rewards Genius, you can set up your first program. We'll take you through setting up a manual program first.



1. Click the **Programs** tab.
2. Click **New**.

MANUAL PROGRAM SET-UP (2/6)

First things first: Choose the Manual program type.



1. Click **Manual**.
2. Click **Next**.

MANUAL PROGRAM SET-UP (3/6)

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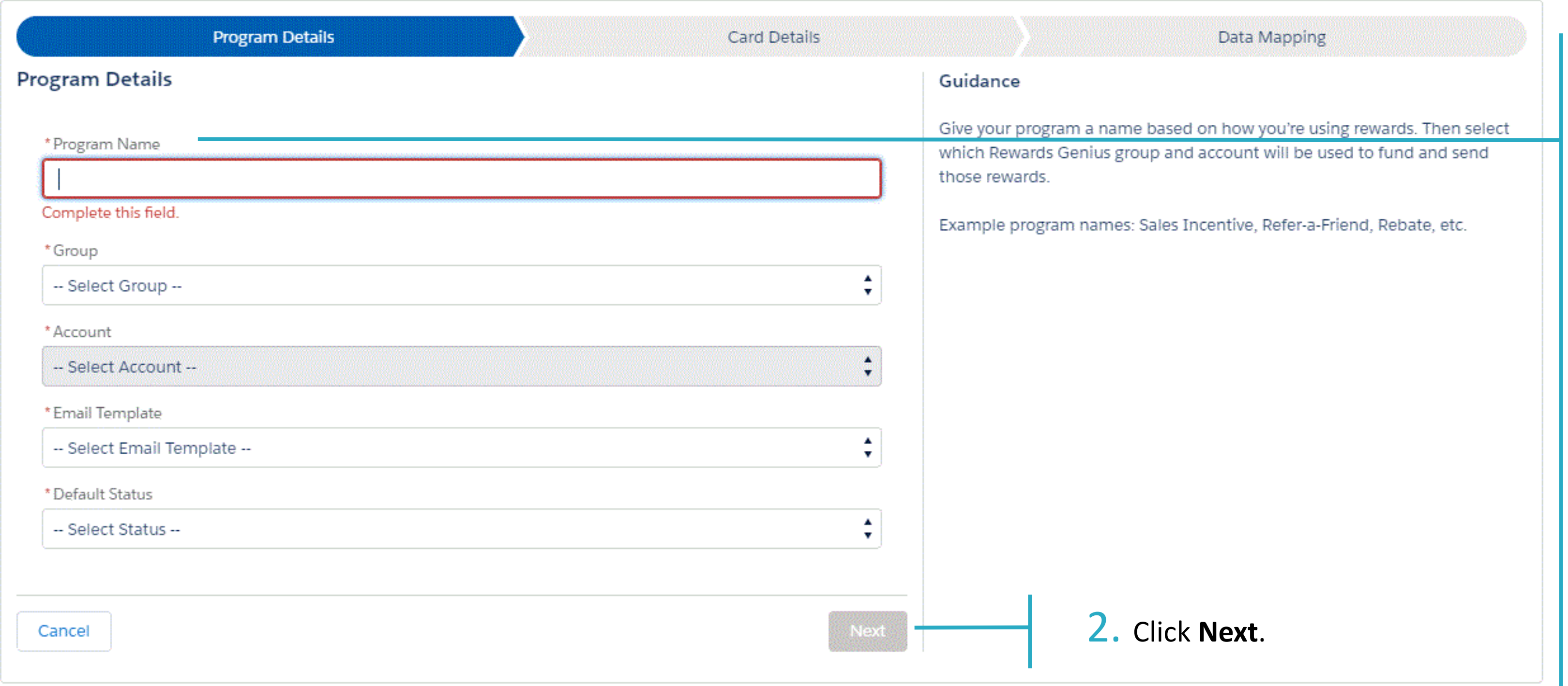
Complete all the required fields in the **Program Details** tab.



2. Click **Next**.

1. Fill out required fields:
   - **Program name:** Choose a unique name that aligns with program goals or use case.
   - **Customer** & **Account:** Enter the Rewards Genius Group and Account you're using to fund this program.
   - **Email template**: Choose which email template you'd like program rewards to be sent out on. *NOTE*: If you're intending to have users include custom messages in reward emails, you must include a dynamic {{message}} tag in the email template created in Rewards Genius.
   - **Default status:** Choose **Approval** if you'd like to approve every reward before it goes out; choose **Pending** to let rewards go out without approval.

MANUAL PROGRAM SET-UP (4/6)

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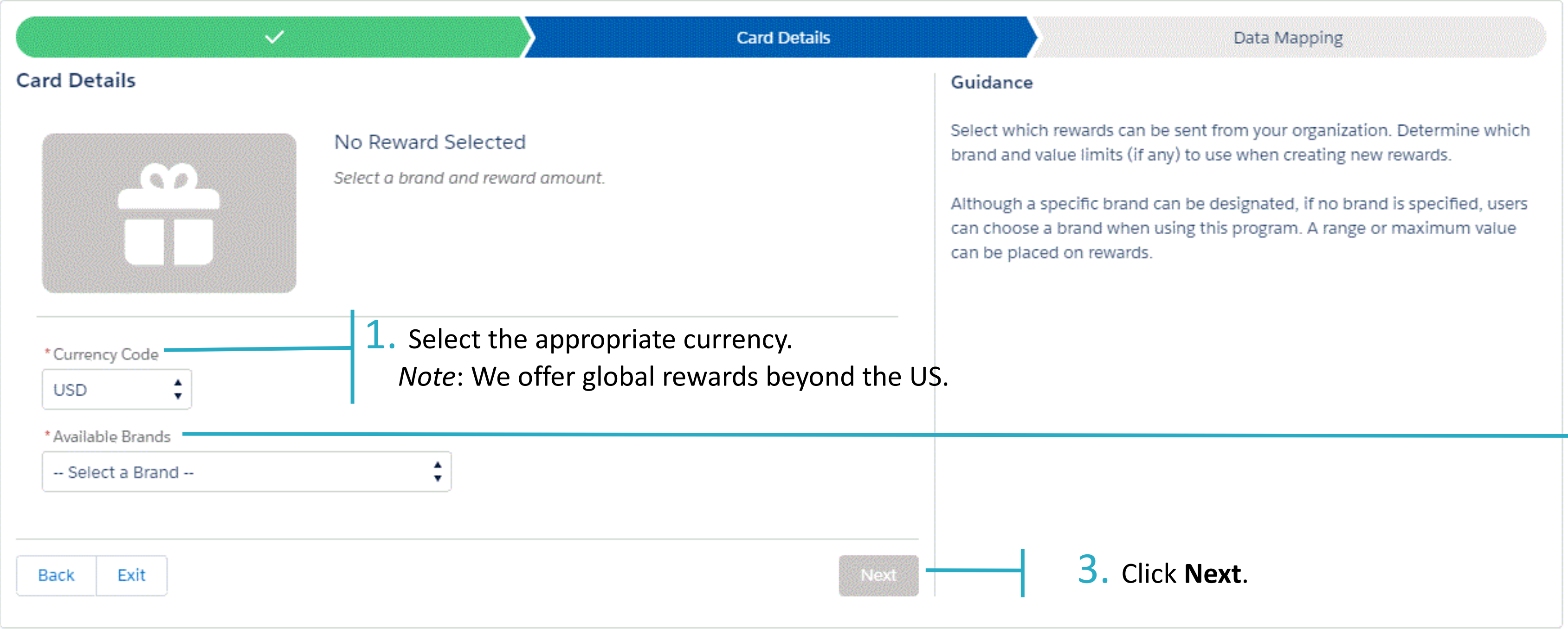
Choose which rewards—and the denominations—you'd like your users to be able to send. Available brands are based on what's loaded into your Rewards Genius catalog. The default reward is [Reward Link Preferred], our choice card with brands like Amazon.com, Starbucks, Target, and Walmart. For more options, [contact us].



1. Select the appropriate currency.
   Note: We offer global rewards beyond the US.

2. Select a reward brand and associated reward amount.

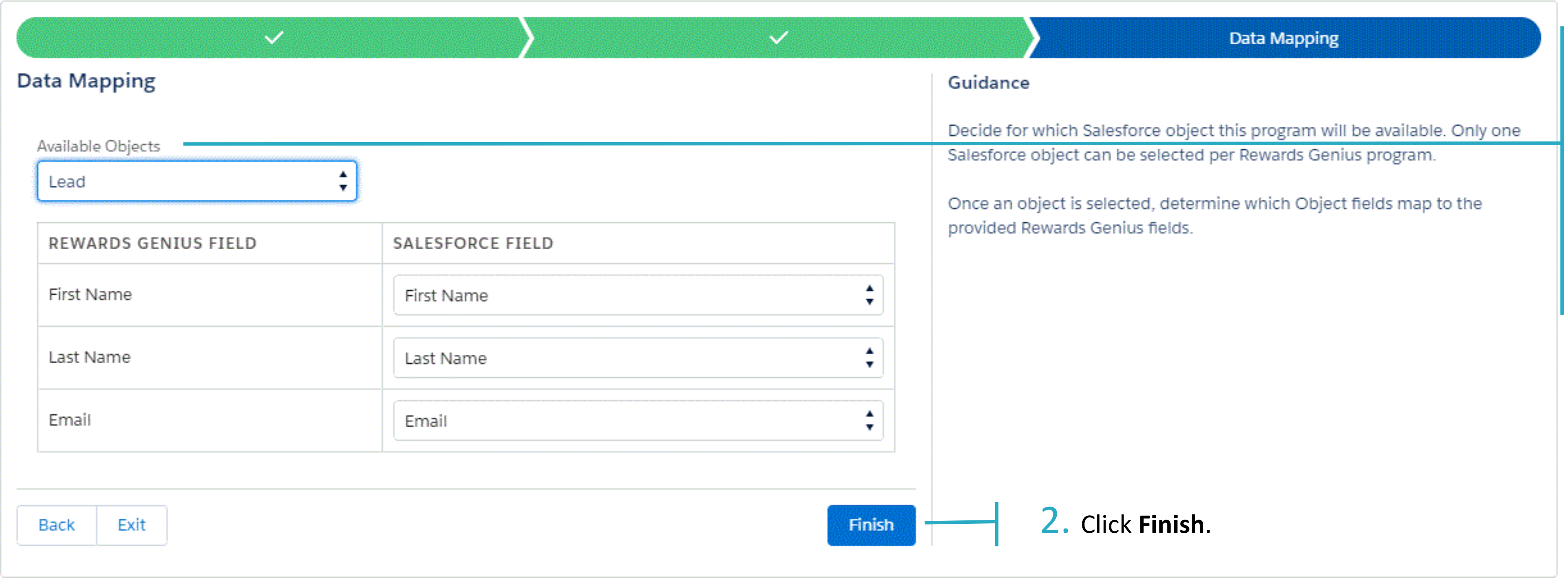
   Note: If no brand is selected, users will be able to send any reward available in your catalog.

3. Click **Next**.

MANUAL PROGRAM SET-UP (5/6)

Determine which Salesforce object this program will be available for and which Object fields will map to the provided Rewards Genius fields.

Note: Only one Salesforce object can be selected per Rewards Genius program.



1. Decide which available Object you'd like to use for this program and then choose and map the appropriate fields. We suggest using Lead or Contact because they allow you to map first name, last name, and email fields, which are required to send rewards.
2. Click **Finish**.

MANUAL PROGRAM SET-UP (6/6)

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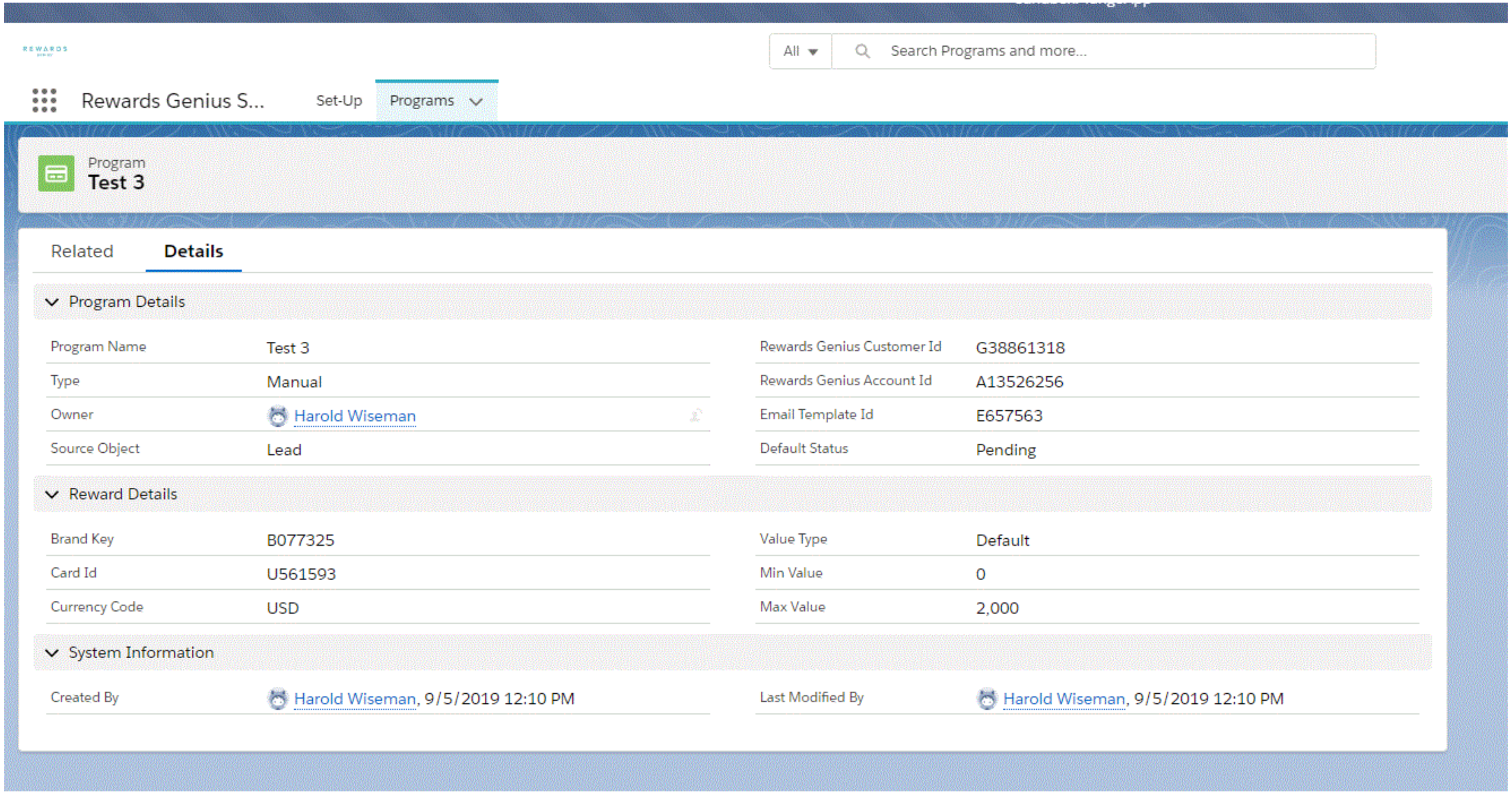
View manual program details on the next screen, including reward details and Rewards Genius Customer/Group and Account IDs as well as email template ID.



HOW TO ADD REWARD LAUNCHER TO A SALESFORCE RECORD PAGE LAYOUT

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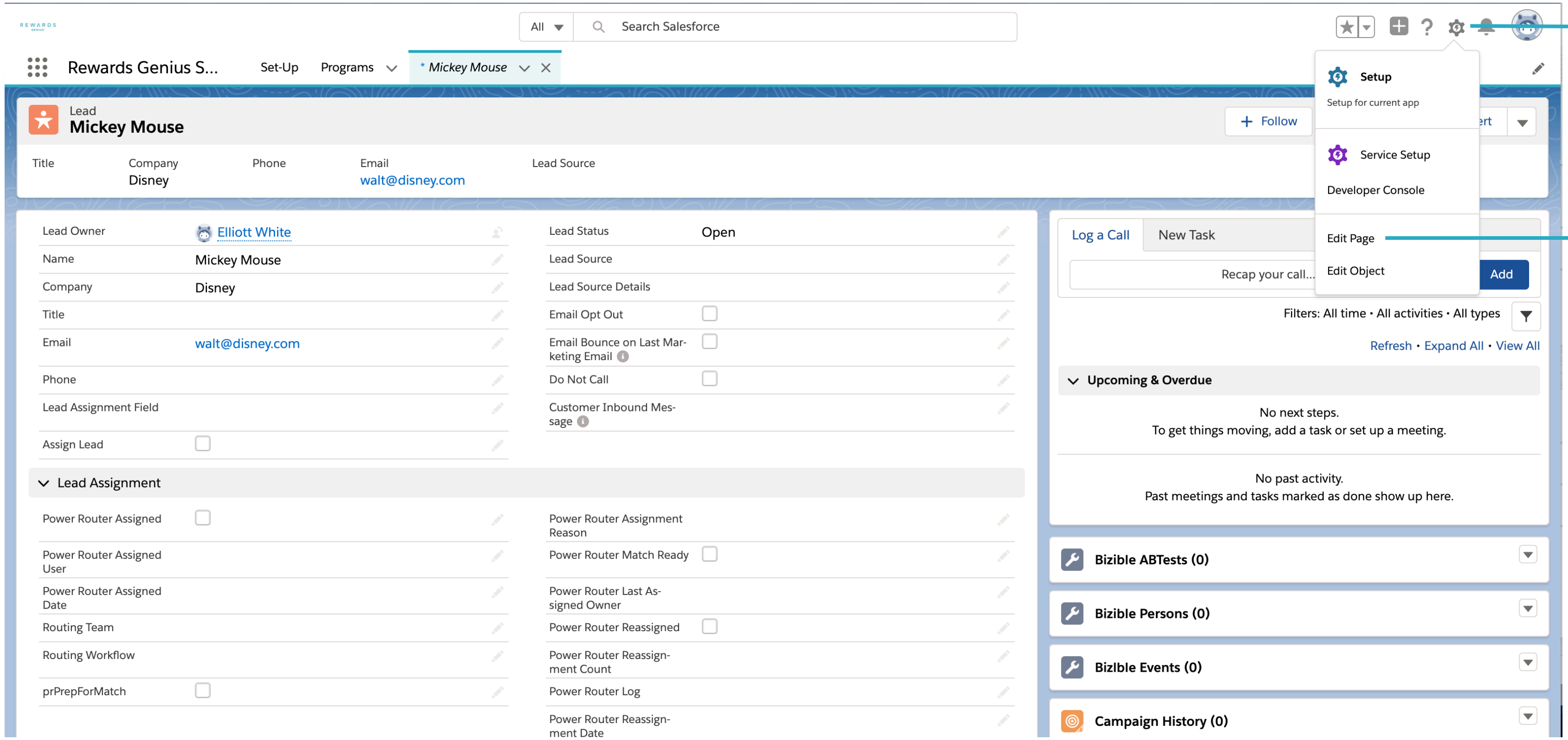
ADD REWARD LAUNCHER (1/3)

Once you've created a manual program, you'll need to add the Rewards Genius for Salesforce visualforce button to either a contact or lead record page so your team can start sending rewards!

Note: You'll only need to add the Rewards Genius Reward Launcher to one record page to apply it to all similar records.



1. Click the set-up icon.

2. Click **Edit Page** from the drop-down menu.

ADD REWARD LAUNCHER (2/3)

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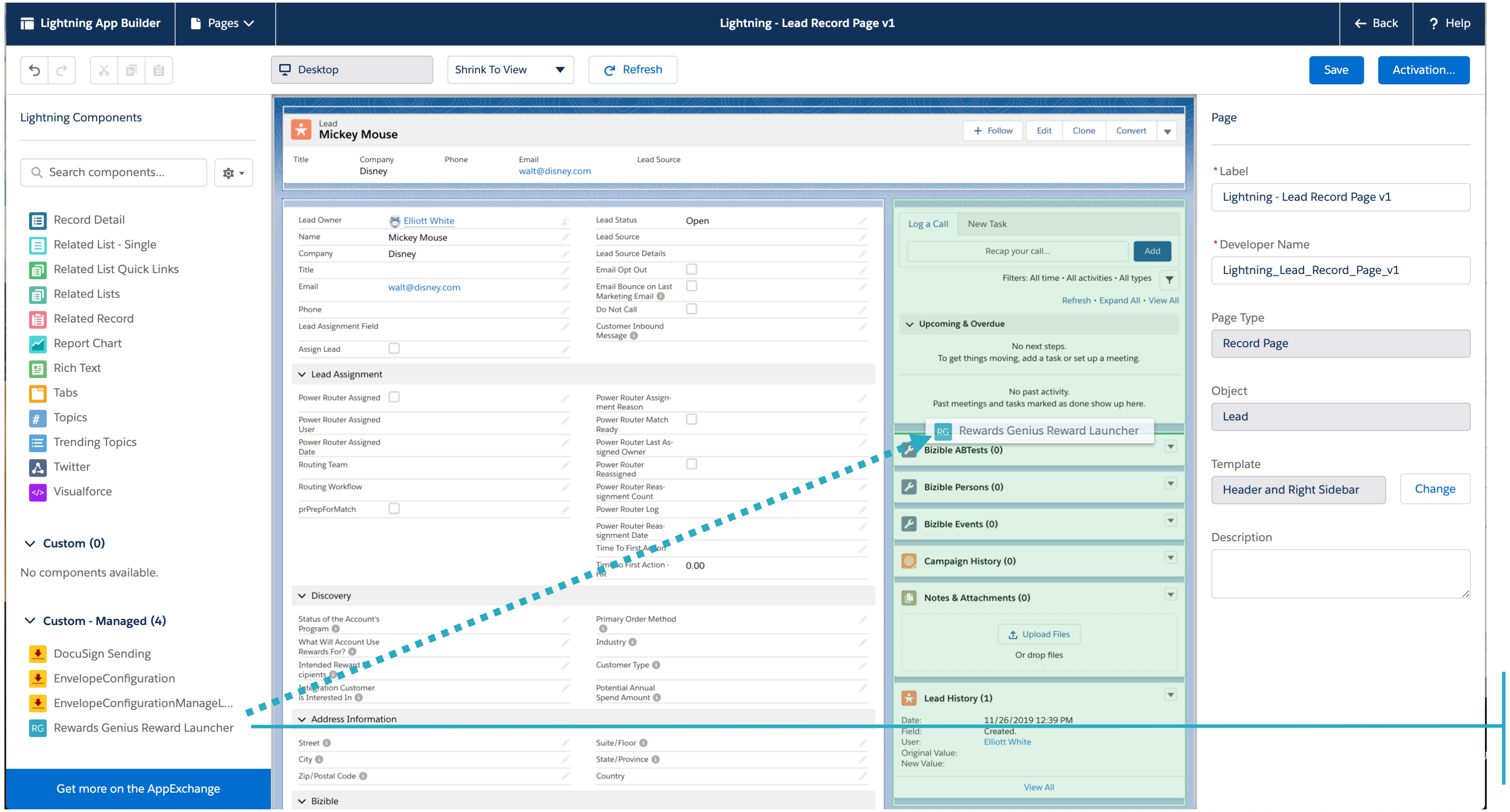
Next, you'll get to choose where to add the Reward Launcher to the page layout.



Grab the **Rewards Genius Reward Launcher** and drag it to whichever section of the page you'd like it to display.

ADD REWARD LAUNCHER (3/3)

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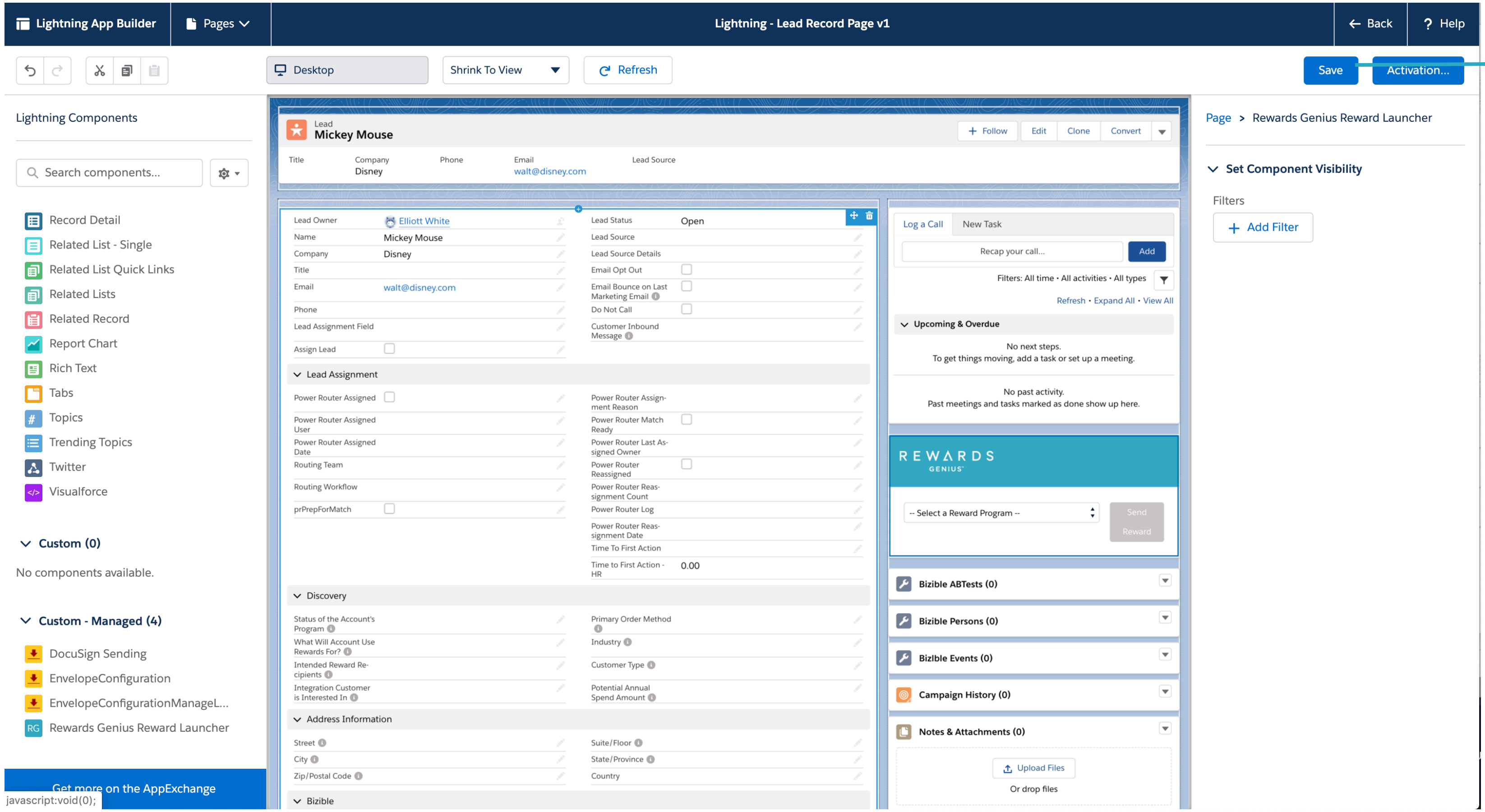
Before clicking save, you'll want to review the page and make sure the Reward Launcher is in the desired position. Once done, team members will be able to view the Reward Launcher within their Salesforce instance.



Click **Save**.

HOW TO SEND A MANUAL REWARD

SEND A MANUAL REWARD (1/2)

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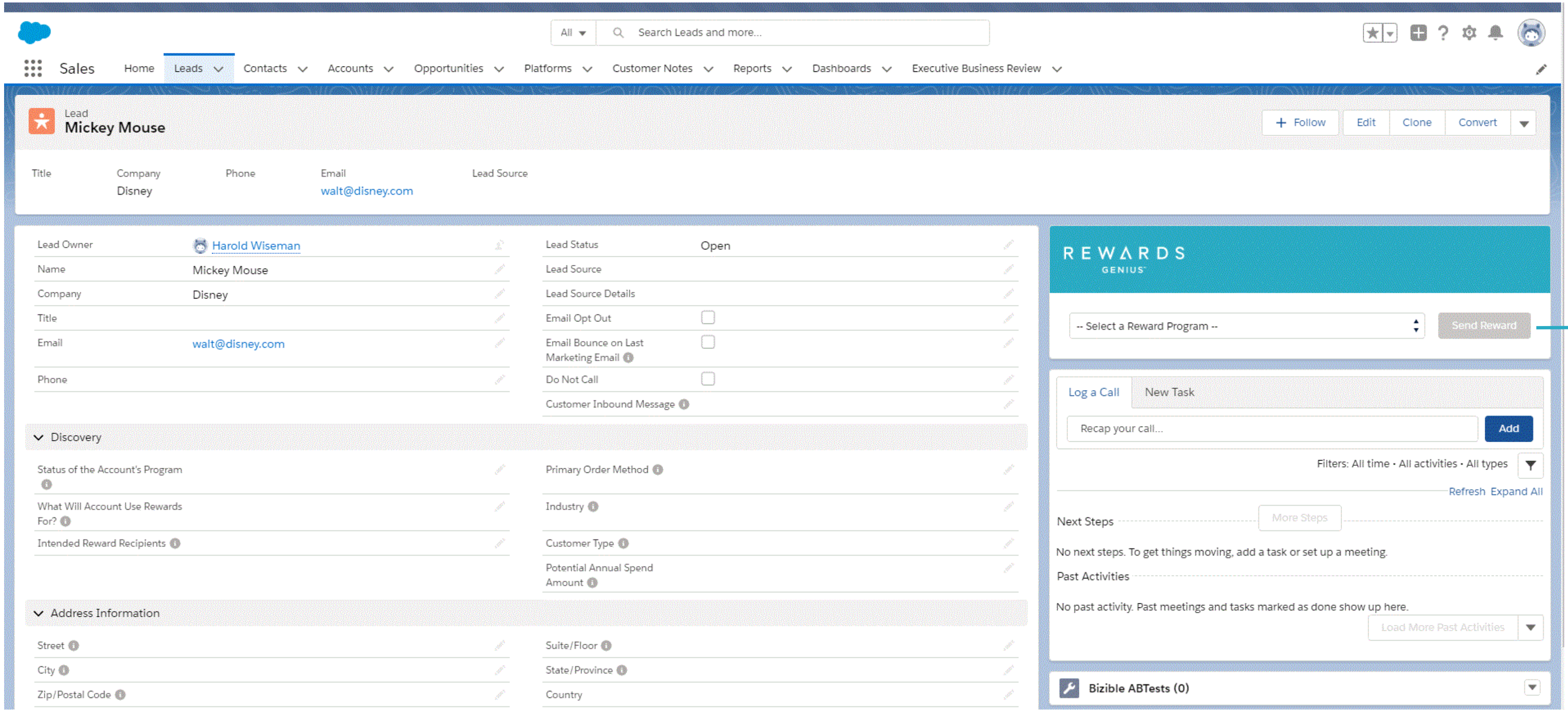
Once the program has been created and the Rewards Genius for Salesforce visualforce button has been added to the Lightning record page layout, your team can start sending rewards!



Choose a reward program and then click **Send Reward**.

SEND A MANUAL REWARD (2/2)

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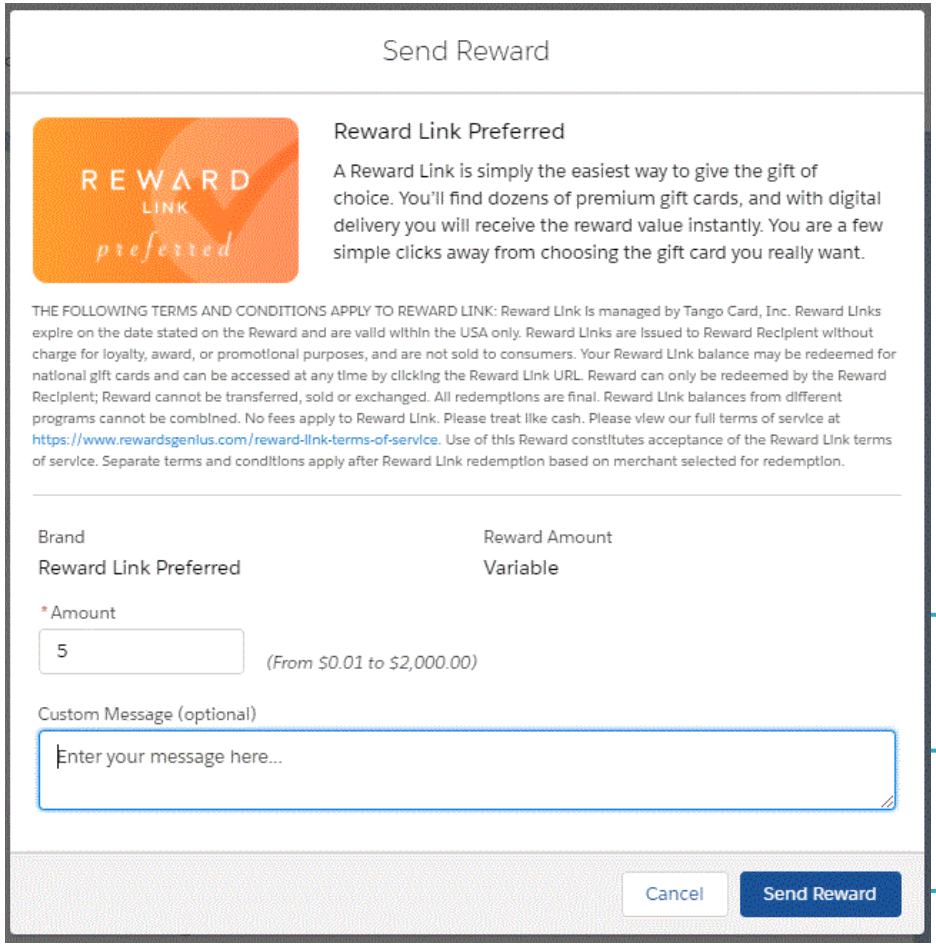
Before sending the reward, users can choose the number of rewards to send and also add a custom message, which will appear in the reward email.



1. Choose the amount of rewards that should be sent.
2. Add a custom message, if desired. *NOTE:* You must insert the {{message}} tag into the Rewards Genius email template for this custom message to be included in the delivered email.
3. Click **Send Reward**.

AUTOMATIC PROGRAM SET-UP

AUTOMATIC PROGRAM SET-UP (1/5)

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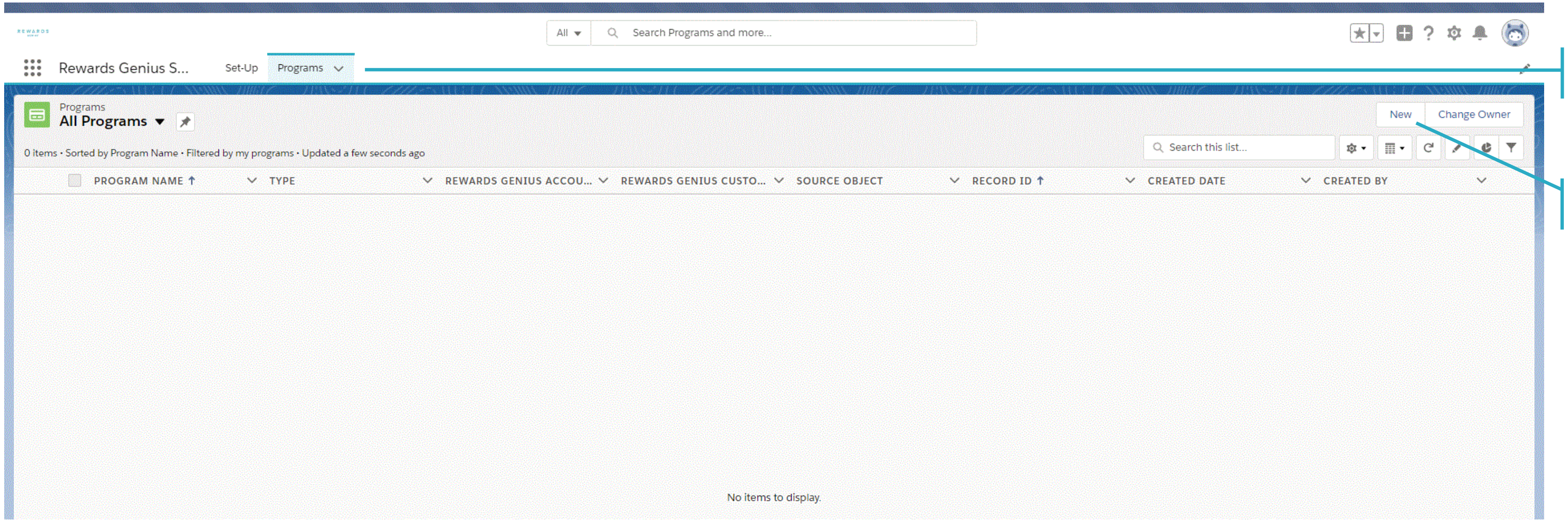
Now we'll take you through setting up an automatic program triggered by Salesforce Process Builder.



1. Click the **Programs** tab.
2. Click **New**.

AUTOMATIC PROGRAM SET-UP (2/5)

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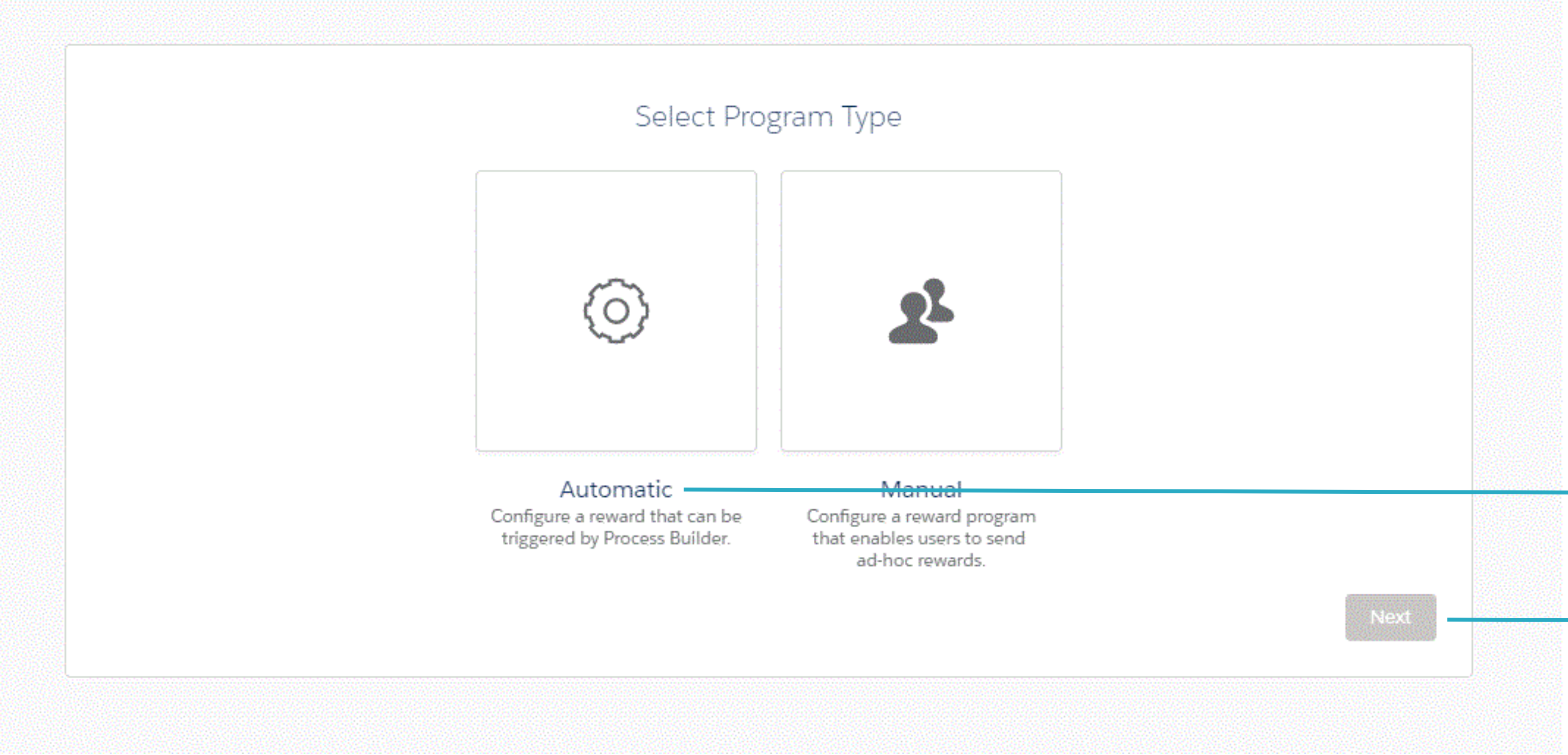
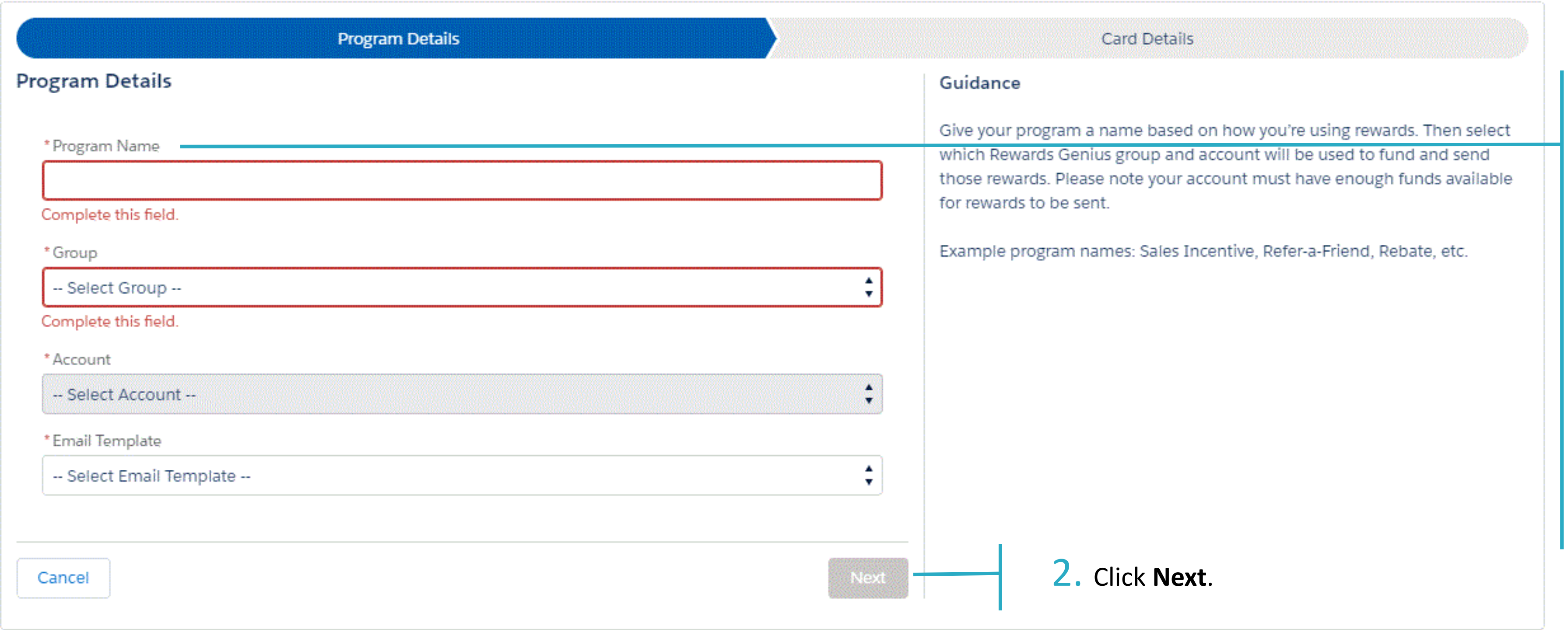
This time you'll choose the Automatic program type.



1. Click **Automatic**.
2. Click **Next**.

AUTOMATIC PROGRAM SET-UP (3/5)

Complete all the required fields in the **Program Details** tab.

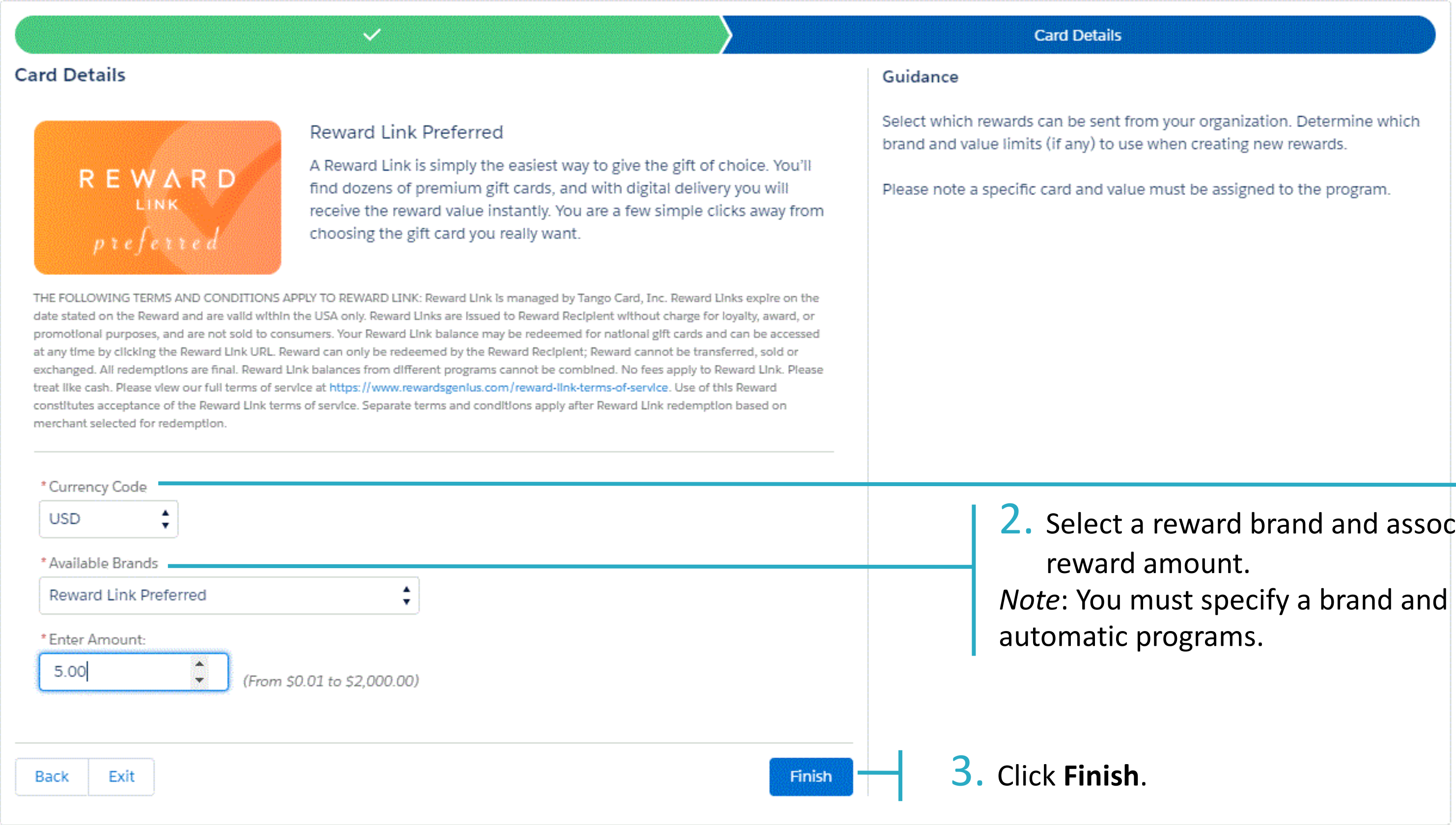


1. Fill out required fields:
   - **Program name:** Choose a unique name that aligns with program goals or use case.
   - **Customer** & **Account:** Enter the Rewards Genius Group and Account you're using to fund this program.
   - **Email template**: Choose which email template you'd like program rewards to be sent out on.
2. Click **Next**.

AUTOMATIC PROGRAM SET-UP (4/5)

REWARDS GENIUS™ by Tango Card

Choose which reward—and denomination—you'd like to send in this program. Available brands are based on what's loaded into your Rewards Genius catalog. The default reward is Reward Link Preferred, our choice card with brands like Amazon.com, Starbucks, Target, and Walmart. For more options, contact us.



1. Select the appropriate currency.
   Note: We offer global rewards beyond the US.
2. Select a reward brand and associated reward amount.
   Note: You must specify a brand and amount for automatic programs.
3. Click **Finish**.

AUTOMATIC PROGRAM SET-UP (5/5)

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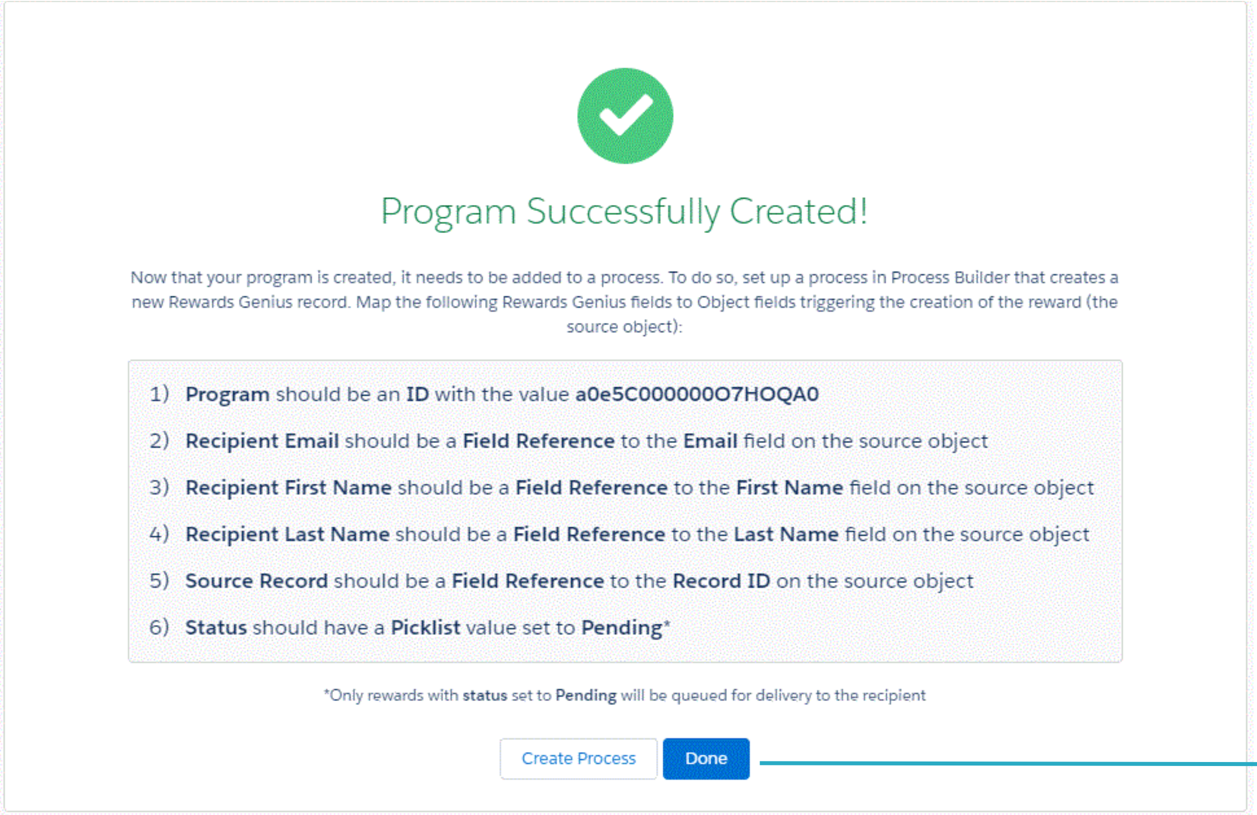
Once you see the Program Successfully Created pop-up window, you're almost done! To start triggering the reward program, a Salesforce Administrator will need to create a process in Process Builder.

We cover how to create a basic process for sending rewards in the next group of slides.



Click **Create Process** to immediately be taken to the Process Builder.

Click **Done** if you want to build the process later or if you are creating unique to catch the rewards program.

CREATING A BASIC PROCESS WITH PROCESS BUILDER

CREATING A BASIC PROCESS (1/4)

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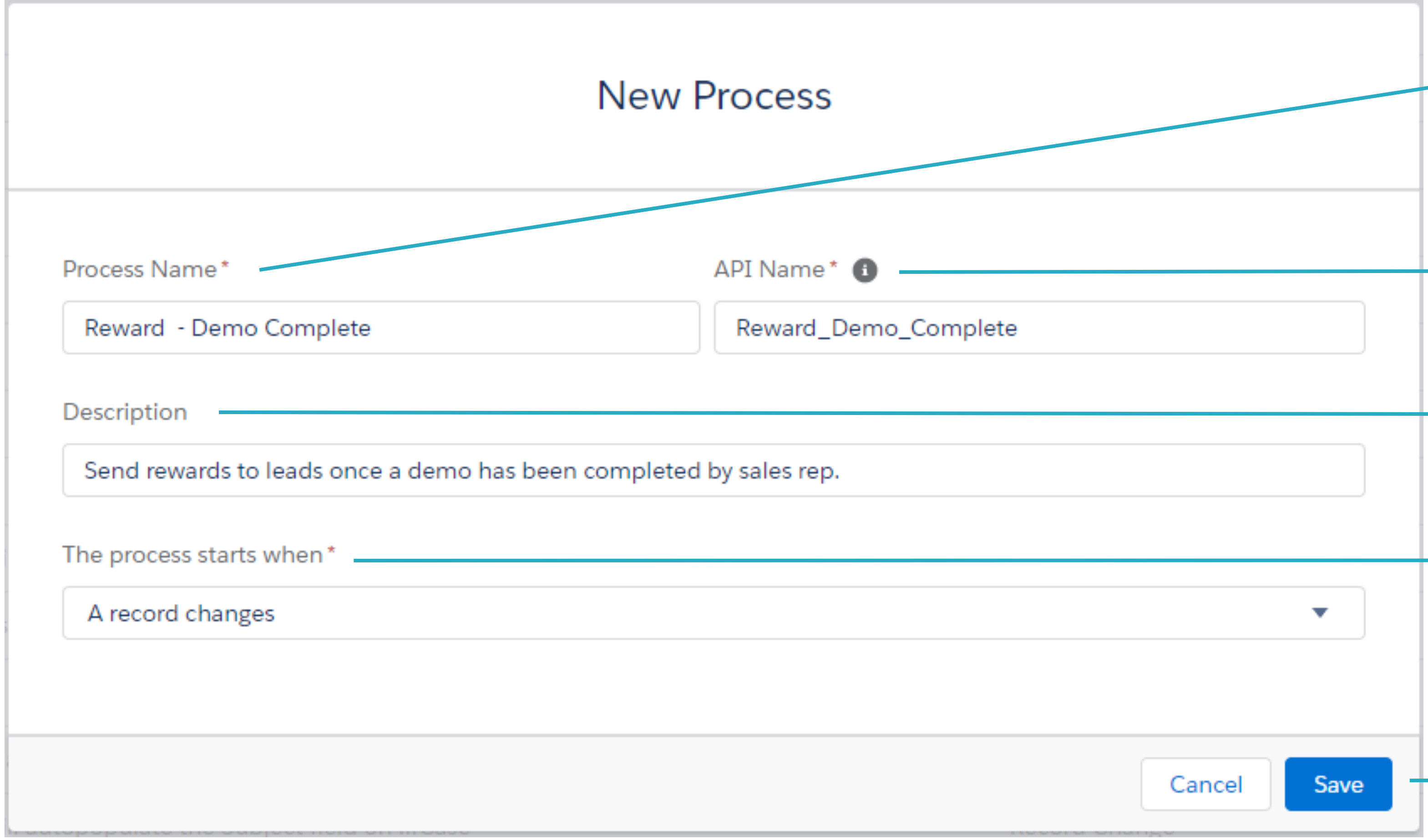
Once you've set up your automatic program, you'll likely need to create a new process to trigger the program. To start, you'll want to name and describe the new process.



1. Choose a process name. We suggest something unique that will allow the process to be easily identified.
2. The API name will auto-generate based on the process-name field.
3. Enter a description of the process.
4. Choose the trigger that starts the process from the drop-down menu.
4. Click **Save**.

CREATING A BASIC PROCESS (2/4)

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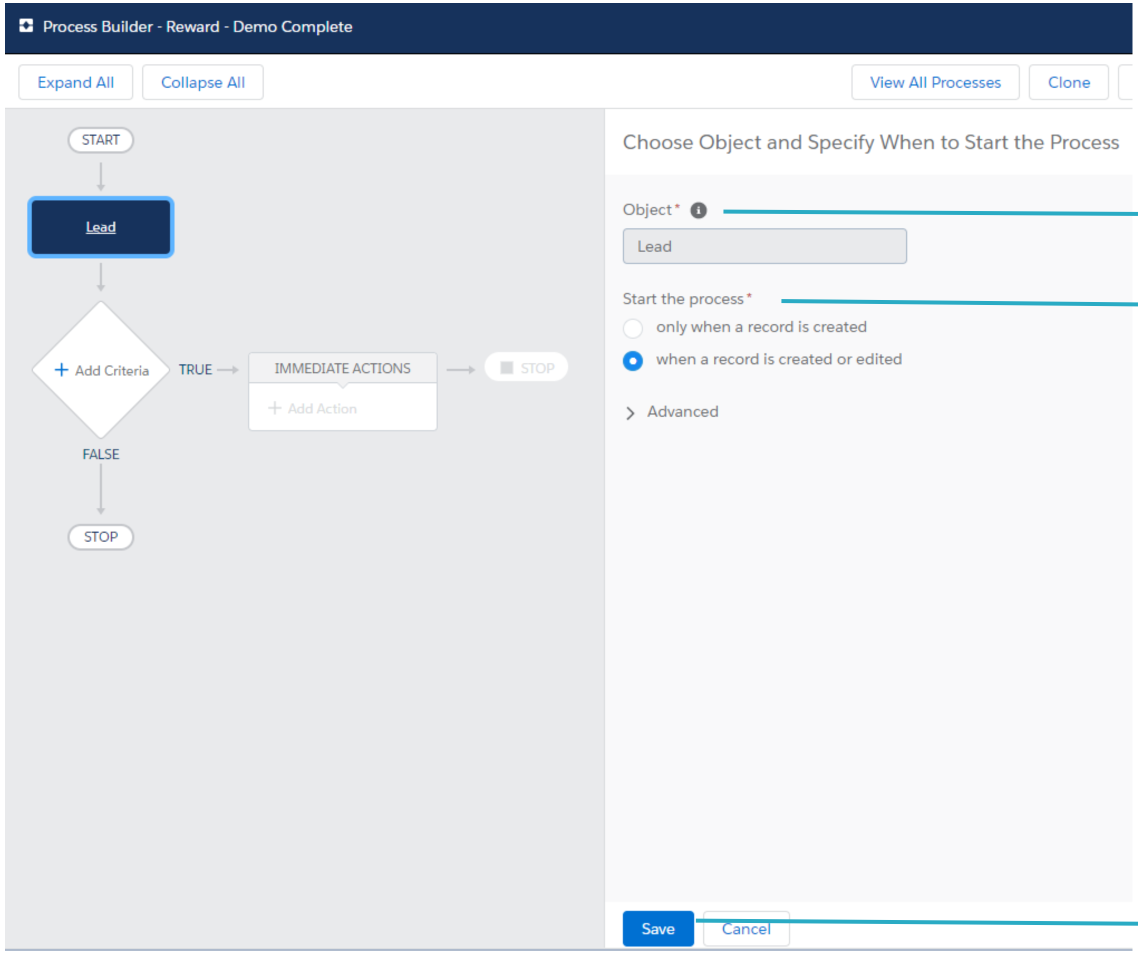
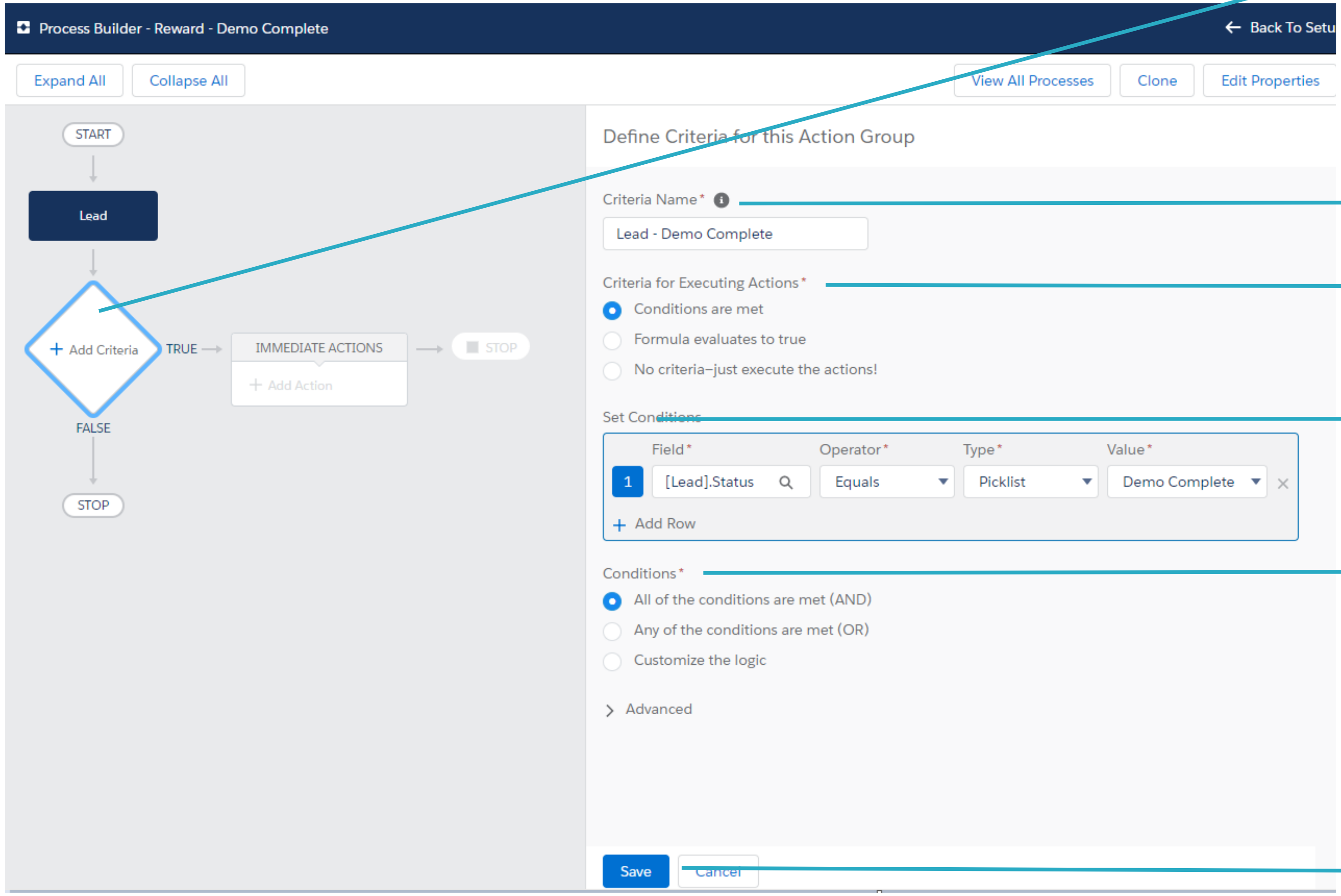
Next, you'll specify when to start the process.



1. Choose the object from which the process will be triggered.
2. Choose whether to start the process when a record is created and/or edited.
3. Click **Save**.

CREATING A BASIC PROCESS (3/4)

Now you'll need to set the criteria for sending a reward.



1. Click + **Add Criteria**.
2. Enter criteria name.
3. Choose the appropriate criteria for executing actions.
4. Set conditions, as needed, for the criteria.
5. Choose whether all or any of the conditions need to be met for the action to be executed.
6. Click **Save**.

CREATING A BASIC PROCESS (4/4)

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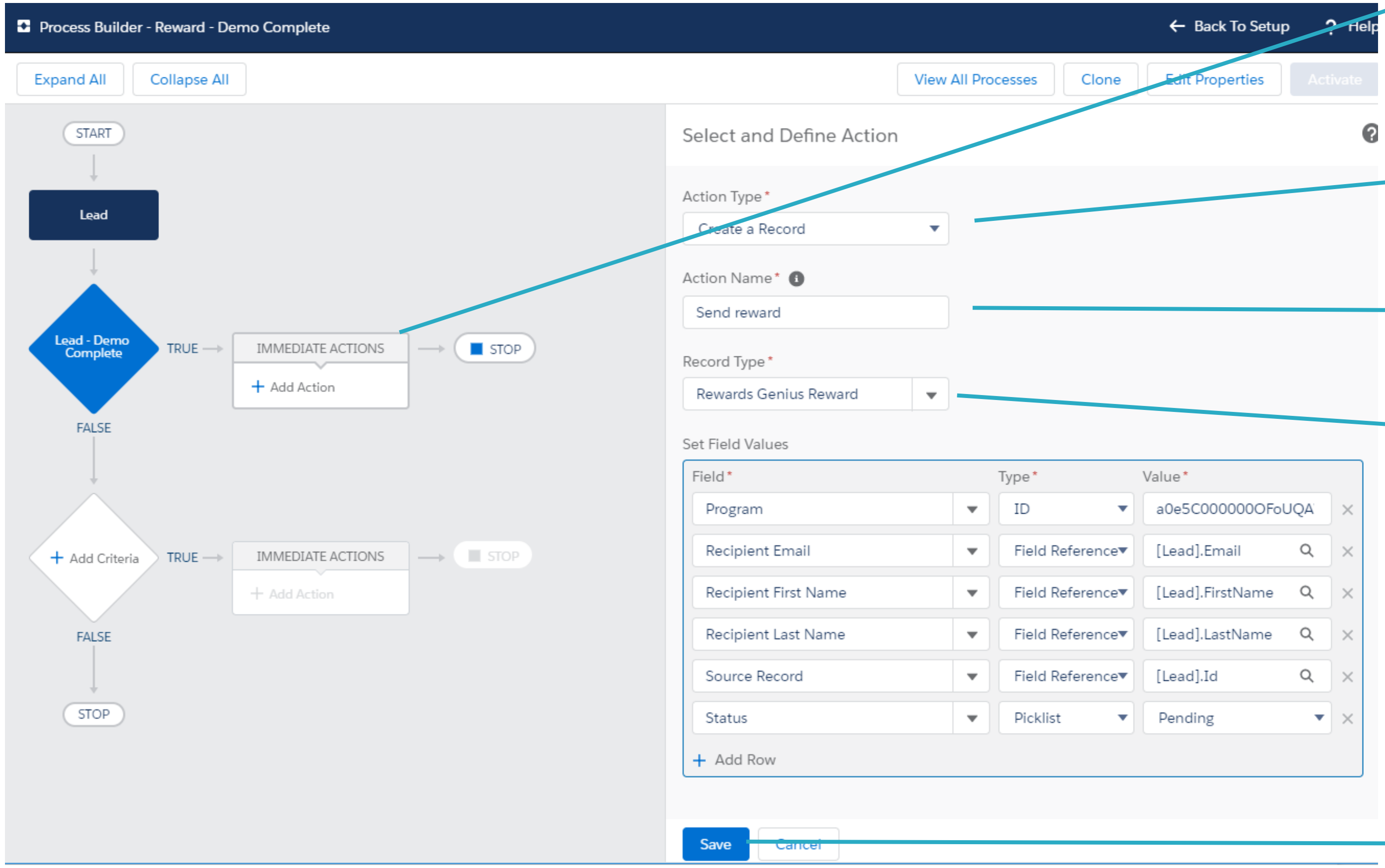
As a last step, you'll need to define the action for sending the reward. For any additional help with using Process Builder, check out the Salesforce help article.

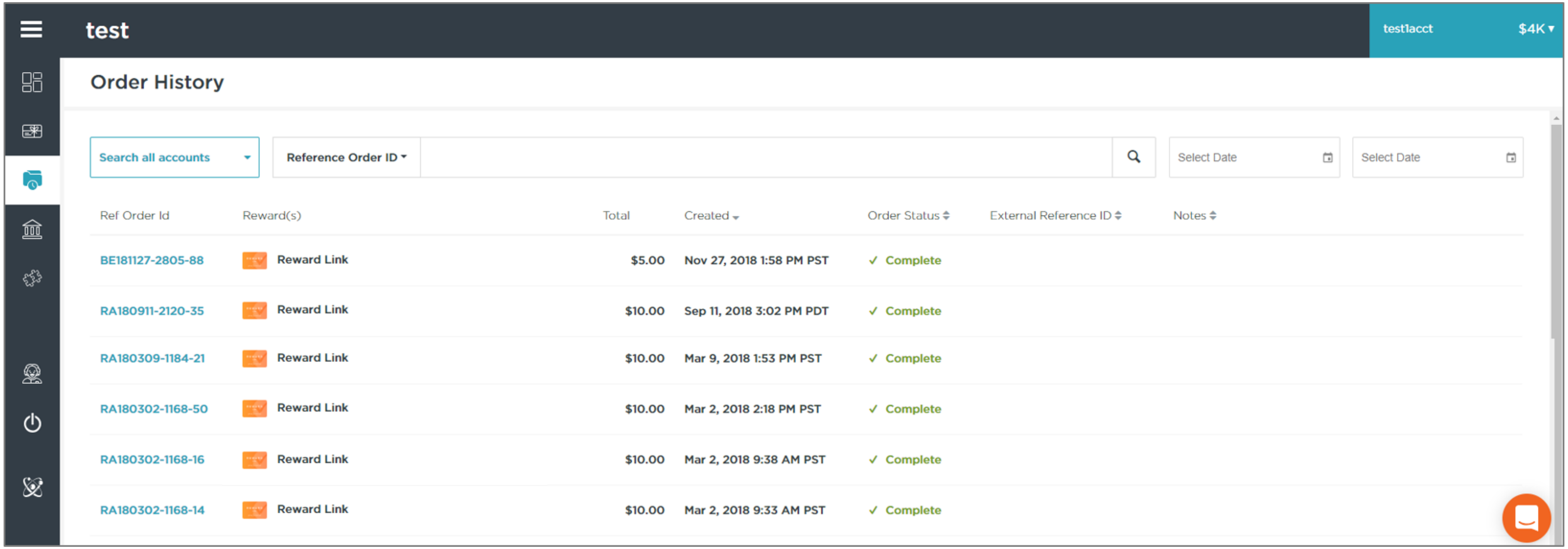


1. Click **+ Add Action**.
2. Choose the desired action from the drop-down menu.
3. Name the action. We suggest calling it **Send Reward**.
4. Select **Rewards Genius Reward** from the drop-down menu.
5. Set the appropriate field values. *Note:* Use the values provided on the Program Success screen (shown on slide 26).
6. Click **Save**.

MANAGE YOUR REWARDS

MANAGE YOUR REWARDS

At any point, you can log into Rewards Genius and navigate to the **Order History** page to view any past rewards sent through Salesforce—from both Manual and Automatic programs.



MANAGE YOUR REWARDS

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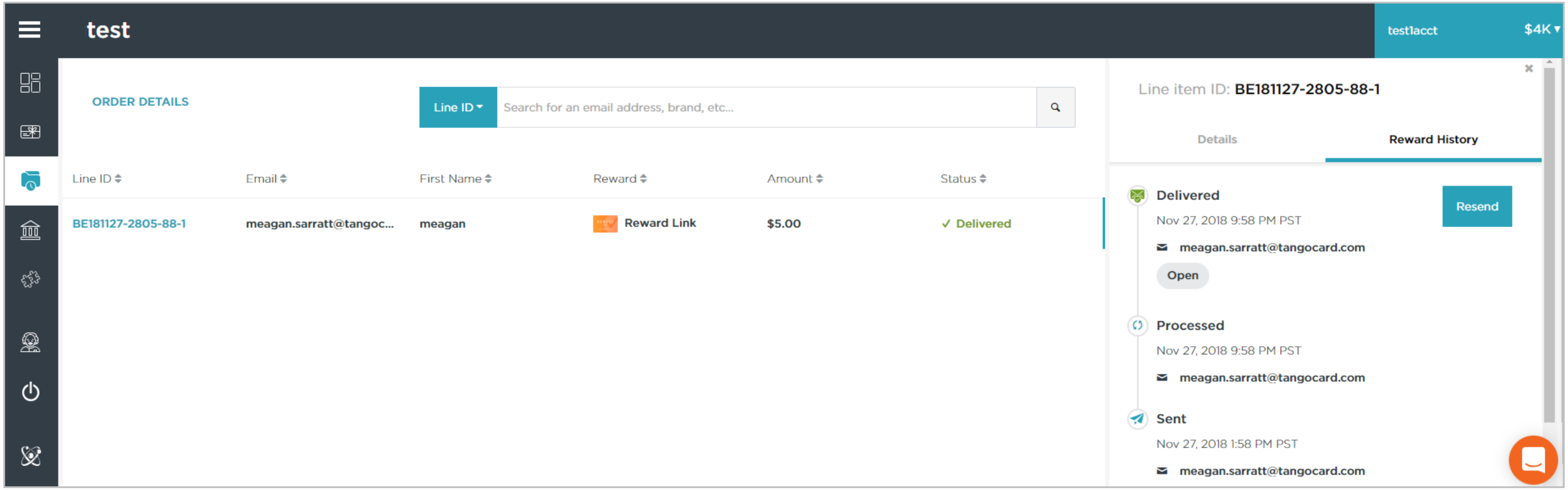
Take even more control of your gift-card spend by digging into order details, including reward amount and recipient, date sent, and delivery status.



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Additional Resources

- Contact us at sales@tangocard.com.
- Check out the Salesforce Process Builder help article.