

A person wearing a hat is sitting on a wooden pier, looking out over a tropical beach. The scene is filled with palm trees and beach umbrellas, all rendered in a light blue, semi-transparent style. The overall mood is serene and vacation-like.

REWARDS

GENIUS™

by Tango Card

## Rewards Genius for Salesforce App: Set-Up Guide

# BEFORE YOU START

## 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.

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.

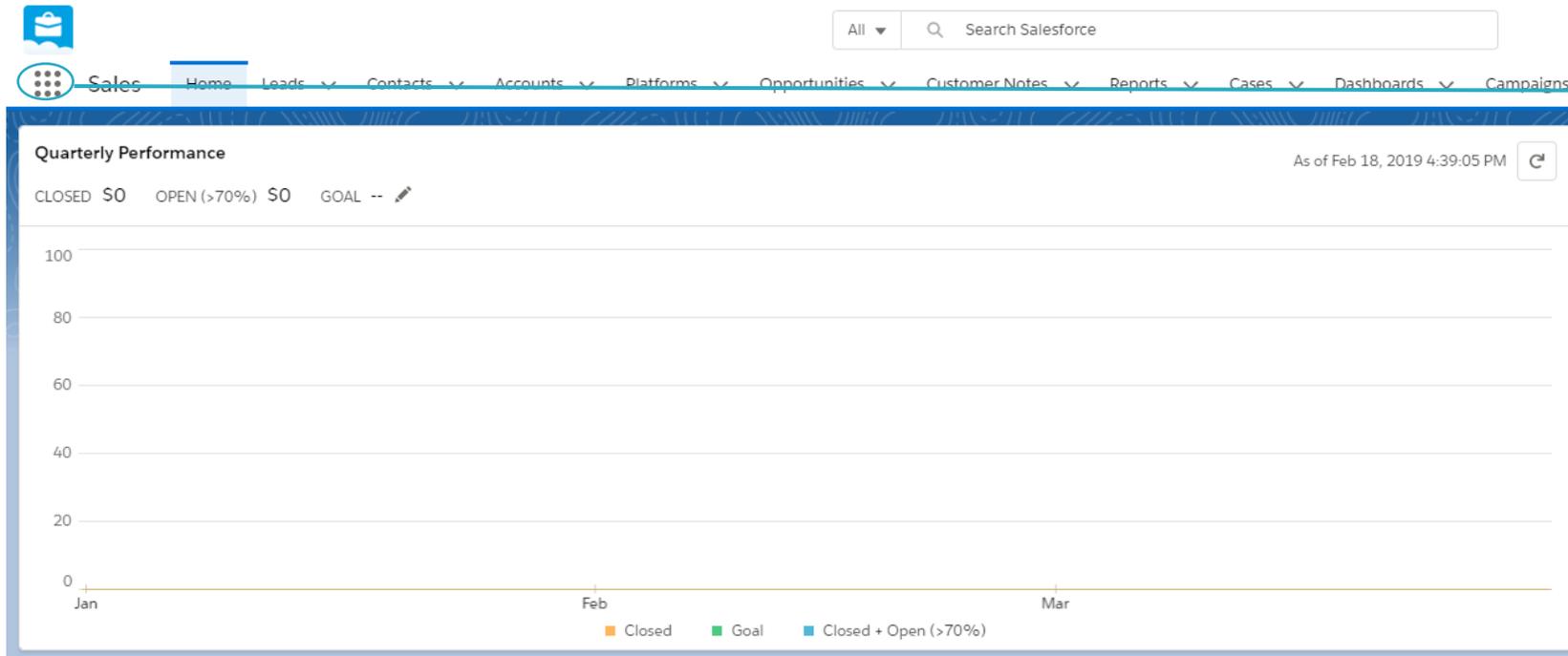
*Example:* "I want to send a \$50 Amazon.com e-gift card to new customers." Set lead conversion as the trigger and then simply add an action for the App to automatically send the potential customer a \$50 Amazon.com e-gift card on a branded email template.

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)

Open the AppLauncher within Salesforce.



1. Click the dialpad to open the AppLauncher.

# CONNECT REWARDS GENIUS TO SALESFORCE (2/6)

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

## 1. Enter Rewards Genius.

The screenshot shows the Salesforce App Launcher interface. At the top, there is a search bar labeled "Search apps or items..." which is circled in red. Below the search bar, there are several app cards displayed in a grid. The "Rewards Genius Set-Up" app card is highlighted with a red box and a red arrow pointing to it. The app card for "Rewards Genius Set-Up" includes the text "Set up and configure your Rewards Genius integration". Below the app cards, there is a section titled "All Items" with a list of various Salesforce features and tools.

All Items				
Accounts	All Rollups	Approval Requests	Assets	Authorization Form
Authorization Form Consent	Authorization Form Data Use	Authorization Form Text	Bizible	Calendar
Campaigns	Cases	Chatter	Contact Point Type Consent	Contacts
Contracts	Customer Notes	Dashboards	Data Use Legal Basis	Data Use Purpose
Discover Companies	DocuSign Admin	DocuSign Envelope Configurations	DocuSign Envelope Documents	DocuSign Envelope Recipient
DocuSign Envelopes	DocuSign Status	Duplicate Record Sets	Email Templates	Enable Real Time Rollups
Enhanced Letterheads	Executive Business Review	Export Rollups	Files	Forecasts
Getting Started	Groups	Home	Leads	Lightning Bolt Solutions
List Emails	Loopio	Macros	Margin Share Agreement	News
Opportunities	Orders	People	Platforms	Price Books
Products	Programs	Quick Text	Quotes	Reports
Rewards Genius	Rollup Helper	Rollup Helper Exceptions	Rollup Helper Help	Rollup Helper Home

## 2. Click Rewards Genius Set-Up.

# CONNECT REWARDS GENIUS TO SALESFORCE (3/6)

Finish setting up the connection between Rewards Genius and Salesforce.

The screenshot shows the Rewards Genius user interface. At the top, there is a navigation bar with a search box labeled "Search Salesforce" and a dropdown menu set to "All". Below the navigation bar, the "Set-Up" tab is selected and highlighted. The main content area features the "REWARDS GENIUS" logo. Below the logo, there are two configuration cards. The first card, "Set Up Connection", includes a green checkmark icon, a description: "Establish and configure the connection between Salesforce and your Rewards Genius account. We recommend downloading the set-up guide from the AppExchange listing and following along.", and an "Edit" button. The second card, "Set Job Schedule", includes a green checkmark icon, a description: "Schedule how frequently Salesforce sends orders to Rewards Genius to be fulfilled.", and an "Edit" button. At the bottom of the interface, there is a paragraph of text: "Our easy-to-use rewards technology, desirable e-gift card catalog, and expert customer-support team come with no fees, so you can focus on growing your business and its bottom line. Thousands of companies already use our products—we invite you to do the same. Reach out if you'd like to learn more."

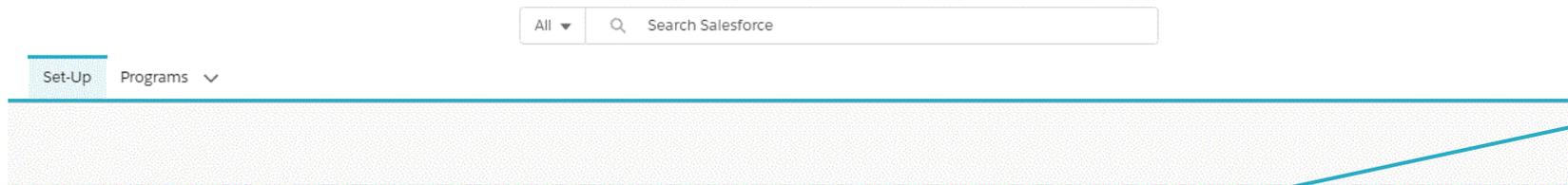
1. Click the **Set-Up** tab.

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.

A screenshot of the "Set Up Connection" dialog box in Salesforce. The dialog has a title "Set Up Connection" and a subtitle "Establish and configure the connection between Salesforce and your Rewards Genius account." At the top, there is a green bar with a checkmark and the word "Connected". Below this, there are two input fields: "Environment" (a dropdown menu with "Sandbox" selected) and "\* Platform Name" (a text field with "\*\*\*\*\*" entered). Below these is another input field for "\* API Key" (a text field with "\*\*\*\*\*" entered). To the right of the input fields is a "Reauthorize" button. At the bottom left is a "Cancel" button and at the bottom right is a "Finish" button. To the right of the dialog is a "Guidance" section with the text: "Provide your Rewards Genius platform name and API key and click **Authorize** to establish the connection. Instructions for obtaining your API key can be found in the set-up guide."

3. Enter the Platform Key. Instructions for finding this information can be found [here](#).

2. Enter the Platform Name found within your Rewards Genius account.

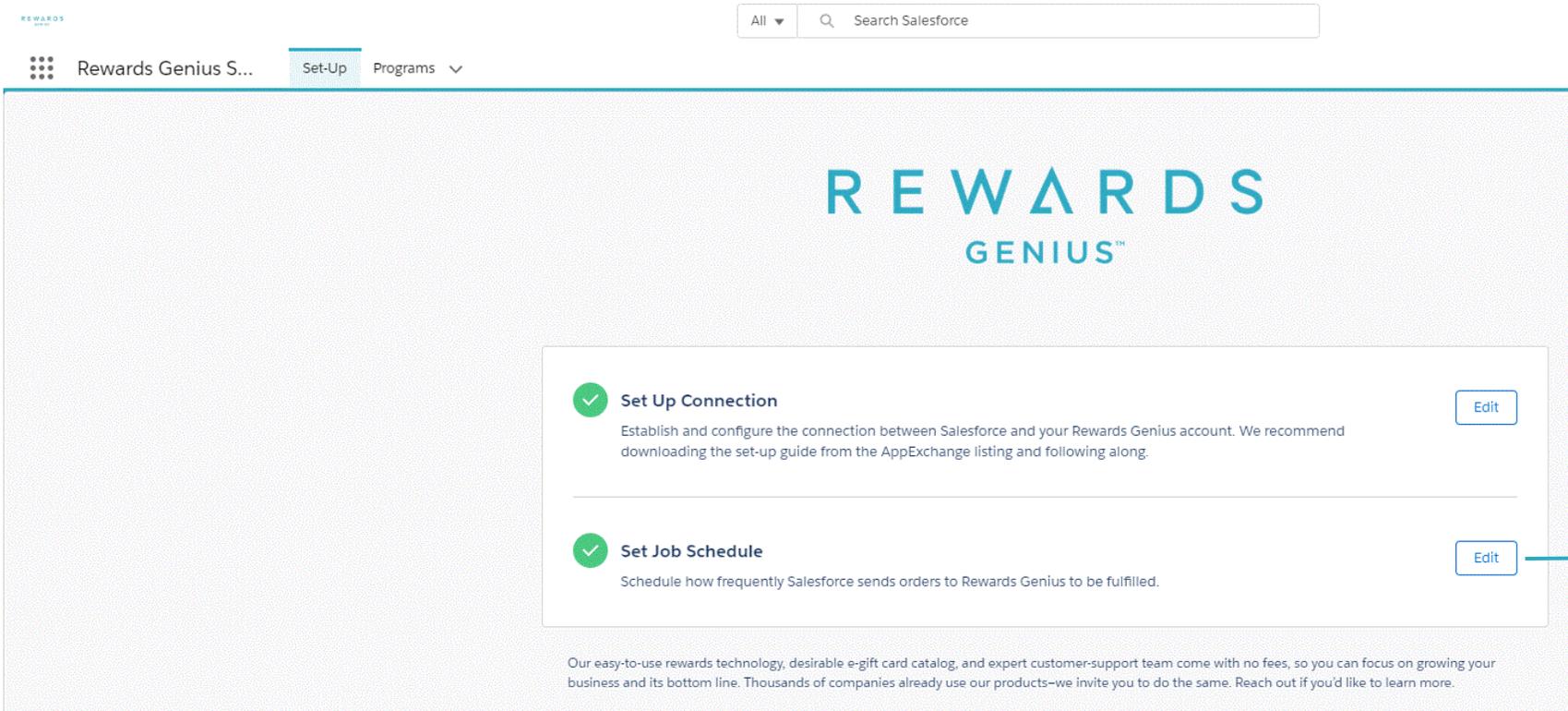
4. Click **Authorize/Reauthorize**.

5. Click **Finish**.

# CONNECT REWARDS GENIUS TO SALESFORCE (5/6)

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.



The screenshot shows the Rewards Genius interface for connecting to Salesforce. At the top, there is a search bar with a dropdown menu set to 'All' and a search input field containing 'Search Salesforce'. Below the search bar, there are navigation tabs: 'Rewards Genius S...', 'Set-Up', and 'Programs'. The main content area features the 'REWARDS GENIUS' logo and two configuration steps:

- Set Up Connection**: A green checkmark icon is next to the title. The description reads: 'Establish and configure the connection between Salesforce and your Rewards Genius account. We recommend downloading the set-up guide from the AppExchange listing and following along.' An 'Edit' button is located to the right of the description.
- Set Job Schedule**: A green checkmark icon is next to the title. The description reads: 'Schedule how frequently Salesforce sends orders to Rewards Genius to be fulfilled.' An 'Edit' button is located to the right of the description. A blue arrow points from the text 'Click Edit.' to this button.

At the bottom of the interface, there is a footer text: 'Our easy-to-use rewards technology, desirable e-gift card catalog, and expert customer-support team come with no fees, so you can focus on growing your business and its bottom line. Thousands of companies already use our products—we invite you to do the same. Reach out if you'd like to learn more.'

# CONNECT REWARDS GENIUS TO SALESFORCE (6/6)

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

The screenshot shows the 'Set Job Schedule' configuration page in the Rewards Genius interface. The page includes a search bar at the top, a navigation menu with 'Set-Up' and 'Programs', and a 'SETUP Set Job Schedule' header. The main content area is titled 'Set Job Schedule' and contains the following elements:

- Job Frequency:** A dropdown menu set to 'Every hour'.
- Job Start Time:** A text field set to 'As Soon as Possible'.
- Deactivate:** A red button to deactivate the job.
- Other Scheduled Jobs:** A table listing other scheduled jobs.
- Guidance:** A section providing instructions on how to manage the job schedule.
- Buttons:** 'Cancel' and 'Finish' buttons at the bottom.

JOB NAME	NEXT RUN TIME
1b7074a1-6436-2b0e-5105-72543bad840e	7/2/2019 7:00 PM

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

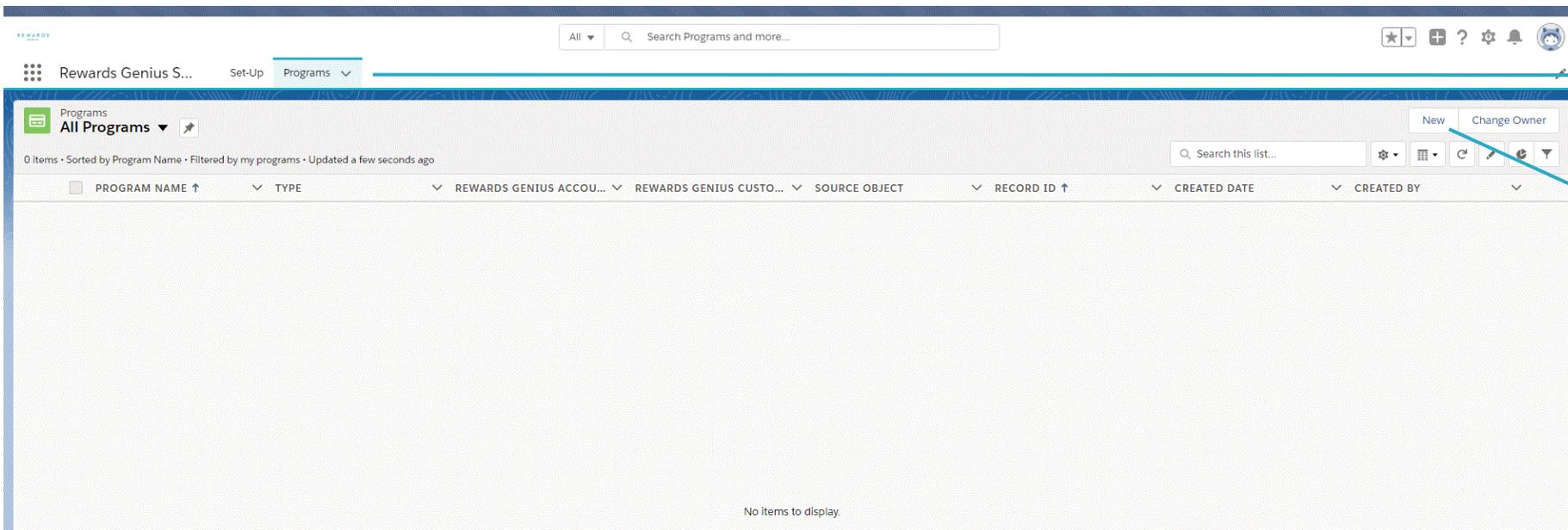
2. Click **Activate/Deactivate**.

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.

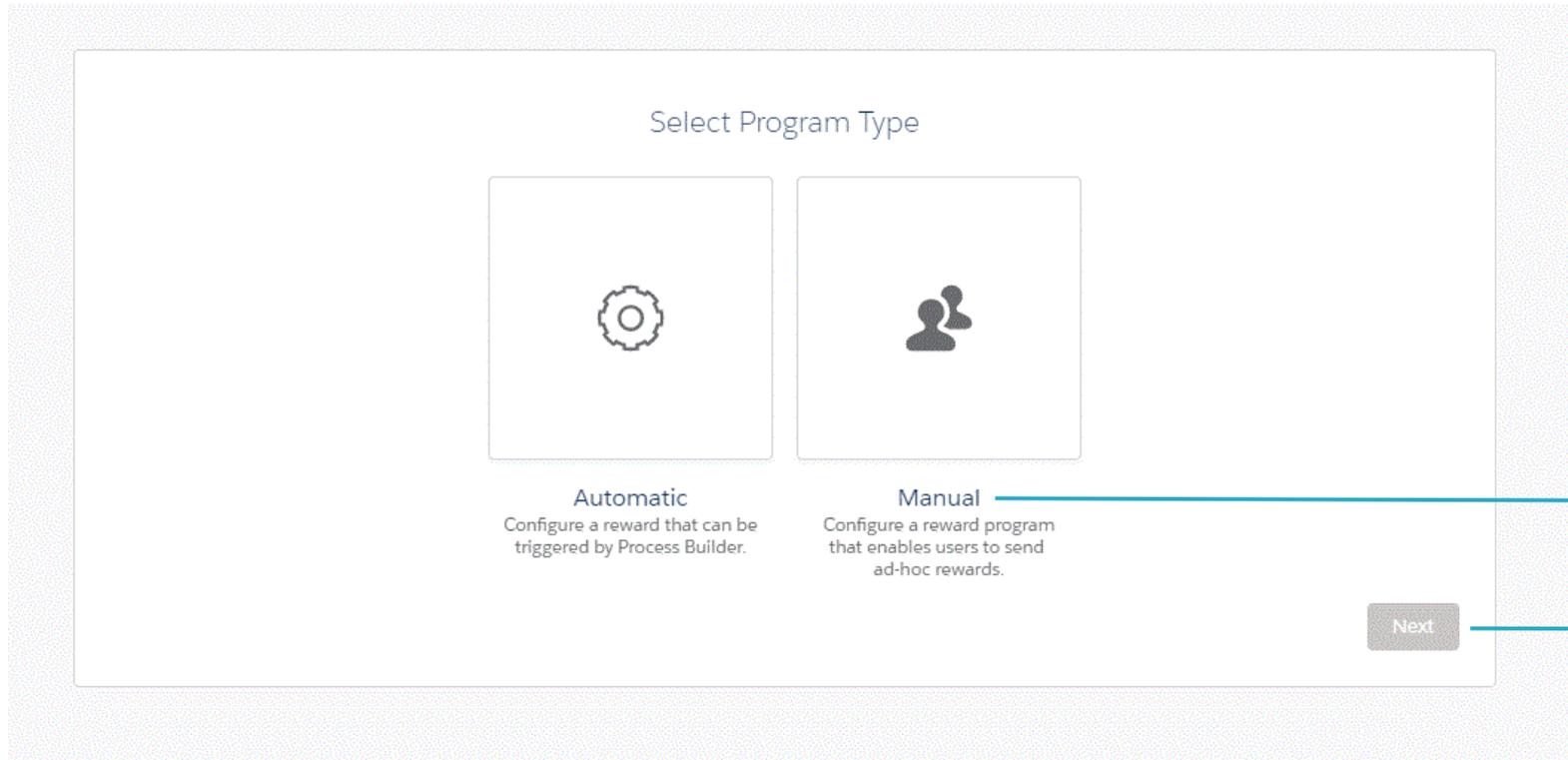


1. Click the **Programs** tab.

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)

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

The screenshot shows the 'Program Details' tab of the Rewards Genius setup interface. The form contains the following fields:

- \* Program Name:** A text input field with a red border and a red box around it. Below it is the text 'Complete this field.'
- \* Group:** A dropdown menu with the placeholder text '-- Select Group --'.
- \* Account:** A dropdown menu with the placeholder text '-- Select Account --'.
- \* Email Template:** A dropdown menu with the placeholder text '-- Select Email Template --'.
- \* Default Status:** A dropdown menu with the placeholder text '-- Select Status --'.

At the bottom of the form, there are two buttons: 'Cancel' on the left and 'Next' on the right. A blue line and arrow point from the 'Next' button to the text '2. Click Next.' located to the right of the form.

## 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)

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](#).

**Card Details**

No Reward Selected  
Select a brand and reward amount.

\* Currency Code  
USD

\* Available Brands  
-- Select a Brand --

Back Exit Next

**Guidance**

Select which rewards can be sent from your organization. Determine which brand and value limits (if any) to use when creating new rewards.

Although a specific brand can be designated, if no brand is specified, users can choose a brand when using this program. A range or maximum value can be placed on rewards.

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.

**Data Mapping**

Available Objects:

REWARDS GENIUS FIELD	SALESFORCE FIELD
First Name	<input type="text" value="First Name"/>
Last Name	<input type="text" value="Last Name"/>
Email	<input type="text" value="Email"/>

**Guidance**

Decide for which Salesforce object this program will be available. Only one Salesforce object can be selected per Rewards Genius program.

Once an object is selected, determine which Object fields map to the provided Rewards Genius fields.

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)

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.

The screenshot shows the 'Program Test 3' details page in the Rewards Genius interface. The page is divided into three main sections: Program Details, Reward Details, and System Information. The 'Program Details' section includes fields for Program Name (Test 3), Type (Manual), Owner (Harold Wiseman), and Source Object (Lead). The 'Reward Details' section includes Brand Key (B077325), Card Id (U561593), Currency Code (USD), Rewards Genius Customer Id (G38861318), Rewards Genius Account Id (A13526256), Email Template Id (E657563), and Default Status (Pending). The 'System Information' section shows the program was created and last modified by Harold Wiseman on 9/5/2019 at 12:10 PM.

Program Test 3			
<b>Program Details</b>			
Program Name	Test 3	Rewards Genius Customer Id	G38861318
Type	Manual	Rewards Genius Account Id	A13526256
Owner	<a href="#">Harold Wiseman</a>	Email Template Id	E657563
Source Object	Lead	Default Status	Pending
<b>Reward Details</b>			
Brand Key	B077325	Value Type	Default
Card Id	U561593	Min Value	0
Currency Code	USD	Max Value	2,000
<b>System Information</b>			
Created By	<a href="#">Harold Wiseman</a> , 9/5/2019 12:10 PM	Last Modified By	<a href="#">Harold Wiseman</a> , 9/5/2019 12:10 PM

# HOW TO ADD REWARD LAUNCHER TO A SALESFORCE RECORD PAGE LAYOUT

# 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.

The screenshot shows a Salesforce interface for a lead record titled 'Mickey Mouse'. The lead is owned by Elliott White and is currently in an 'Open' status. The interface includes a top navigation bar with 'Rewards Genius S...' and 'Mickey Mouse' tabs. A setup menu is open in the top right corner, showing options: Setup, Service Setup, Developer Console, Edit Page (highlighted), and Edit Object. The main content area displays lead details and a 'Lead Assignment' section with various routing and assignment fields.

1. Click the set-up icon.

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

# ADD REWARD LAUNCHER (2/3)

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

The screenshot displays the Lightning App Builder interface for editing a page layout. The main view shows a lead record for 'Mickey Mouse' with various fields and sections. A dashed blue arrow points from the 'Rewards Genius Reward Launcher' component in the left-hand 'Lightning Components' palette to the 'Upcoming & Overdue' section of the lead record page. The right-hand side shows the 'Page' configuration panel with fields for Label, Developer Name, Page Type, Object, Template, and Description.

**Lightning App Builder** | Pages ▾ | Lightning - Lead Record Page v1 | Back | Help

Desktop | Shrink To View ▾ | Refresh

Save | Activation...

**Lightning Components**

Search components... ⚙

- Record Detail
- Related List - Single
- Related List Quick Links
- Related Lists
- Related Record
- Report Chart
- Rich Text
- Tabs
- Topics
- Trending Topics
- Twitter
- Visualforce
- Custom (0)  
No components available.
- Custom - Managed (4)
  - DocuSign Sending
  - EnvelopeConfiguration
  - EnvelopeConfigurationManageL...
  - Rewards Genius Reward Launcher

**Lead: Mickey Mouse** | + Follow | Edit | Clone | Convert ▾

Title	Company	Phone	Email	Lead Source
	Disney		walt@disney.com	

**Lead Owner:** Elliott White

**Name:** Mickey Mouse

**Company:** Disney

**Title:**

**Email:** walt@disney.com

**Phone:**

**Lead Assignment Field:**

**Assign Lead:**

**Lead Status:** Open

**Lead Source:**

**Lead Source Details:**

**Email Opt Out:**

**Email Bounce on Last Marketing Email:**

**Do Not Call:**

**Customer Inbound Message:**

**Lead Assignment**

- Power Router Assigned:
- Power Router Assigned Reason:
- Power Router Assigned User:
- Power Router Assigned Date:
- Routing Team:
- Routing Workflow:
- prPrepForMatch:
- Power Router Assignment Reason:
- Power Router Match Ready:
- Power Router Last Assigned Owner:
- Power Router Reassigned:
- Power Router Reassignment Count:
- Power Router Log:
- Power Router Reassignment Date:
- Time To First Action: 0.00

**Discovery**

- Status of the Account's Program:
- What Will Account Use Rewards For?:
- Intended Rewards clients:
- Intention Customer:
- Interested In:
- Primary Order Method:
- Industry:
- Customer Type:
- Potential Annual Spend Amount:

**Address Information**

- Street:
- City:
- Zip/Postal Code:
- Suite/Floor:
- State/Province:
- Country:

**Bizible**

**Log a Call** | **New Task**

Recap your call... **Add**

Filters: All time • All activities • All types

Refresh • Expand All • View All

**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity.  
Past meetings and tasks marked as done show up here.

- Rewards Genius Reward Launcher
- Bizible ABTests (0)
- Bizible Persons (0)
- Bizible Events (0)
- Campaign History (0)
- Notes & Attachments (0)
- Lead History (1)

**Page**

\* Label  
Lightning - Lead Record Page v1

\* Developer Name  
Lightning\_Lead\_Record\_Page\_v1

Page Type  
Record Page

Object  
Lead

Template  
Header and Right Sidebar **Change**

Description

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)

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.

The screenshot shows the Lightning App Builder interface for a 'Lead Record Page v1'. The main content area displays a lead record for 'Mickey Mouse' with various fields and sections. On the right side, the 'Set Component Visibility' panel is open, showing a list of components. The 'REWARDS GENIUS' component is highlighted, and its configuration is visible, including a dropdown menu for 'Select a Reward Program' and a 'Send Reward' button. A blue arrow points from the text 'Click Save.' to the 'Save' button in the top right corner of the interface.

Click **Save**.

# HOW TO SEND A MANUAL REWARD

# SEND A MANUAL REWARD (1/2)

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!

The screenshot displays a Salesforce Lightning interface for a lead record. The lead is named "Mickey Mouse" and is associated with the company "Disney". The lead owner is "Harold Wiseman". The lead status is "Open". The lead source is "Marketing Email". The lead source details include "Email Opt Out", "Email Bounce on Last Marketing Email", and "Do Not Call". The lead source details also include "Customer Inbound Message". The lead source details also include "Primary Order Method", "Industry", "Customer Type", and "Potential Annual Spend Amount". The lead source details also include "Status of the Account's Program", "What Will Account Use Rewards For?", and "Intended Reward Recipients". The lead source details also include "Street", "City", "Zip/Postal Code", "Suite/Floor", "State/Province", and "Country".

The "REWARDS GENIUS" sidebar is located on the right side of the page. It features a dropdown menu with the text "-- Select a Reward Program --" and a "Send Reward" button. Below the dropdown menu, there is a "Log a Call" section with a "New Task" button and a "Recap your call..." input field with an "Add" button. Below the "Log a Call" section, there is a "Next Steps" section with a "More Steps" button and a message: "No next steps. To get things moving, add a task or set up a meeting." Below the "Next Steps" section, there is a "Past Activities" section with a "Load More Past Activities" button and a message: "No past activity. Past meetings and tasks marked as done show up here."

A blue arrow points from the text "Choose a reward program and then click Send Reward." to the "Send Reward" button in the "REWARDS GENIUS" sidebar.

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

# SEND A MANUAL REWARD (2/2)

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.

### Send Reward



**Reward Link Preferred**

A Reward Link is simply the easiest way to give the gift of choice. You'll find dozens of premium gift cards, and with digital delivery you will receive the reward value instantly. You are a few simple clicks away from choosing the gift card you really want.

THE FOLLOWING TERMS AND CONDITIONS APPLY TO REWARD LINK: Reward Link is managed by Tango Card, Inc. Reward Links expire on the date stated on the Reward and are valid within the USA only. Reward Links are issued to Reward Recipient without charge for loyalty, award, or promotional purposes, and are not sold to consumers. Your Reward Link balance may be redeemed for national gift cards and can be accessed at any time by clicking the Reward Link URL. Reward can only be redeemed by the Reward Recipient; Reward cannot be transferred, sold or exchanged. All redemptions are final. Reward Link balances from different programs cannot be combined. No fees apply to Reward Link. Please treat like cash. Please view our full terms of service at <https://www.rewardsgenius.com/reward-link-terms-of-service>. Use of this Reward constitutes acceptance of the Reward Link terms of service. Separate terms and conditions apply after Reward Link redemption based on merchant selected for redemption.

Brand	Reward Amount
Reward Link Preferred	Variable

\* Amount

 (From \$0.01 to \$2,000.00)

Custom Message (optional)

1. Choose the amount of rewards that should be sent.

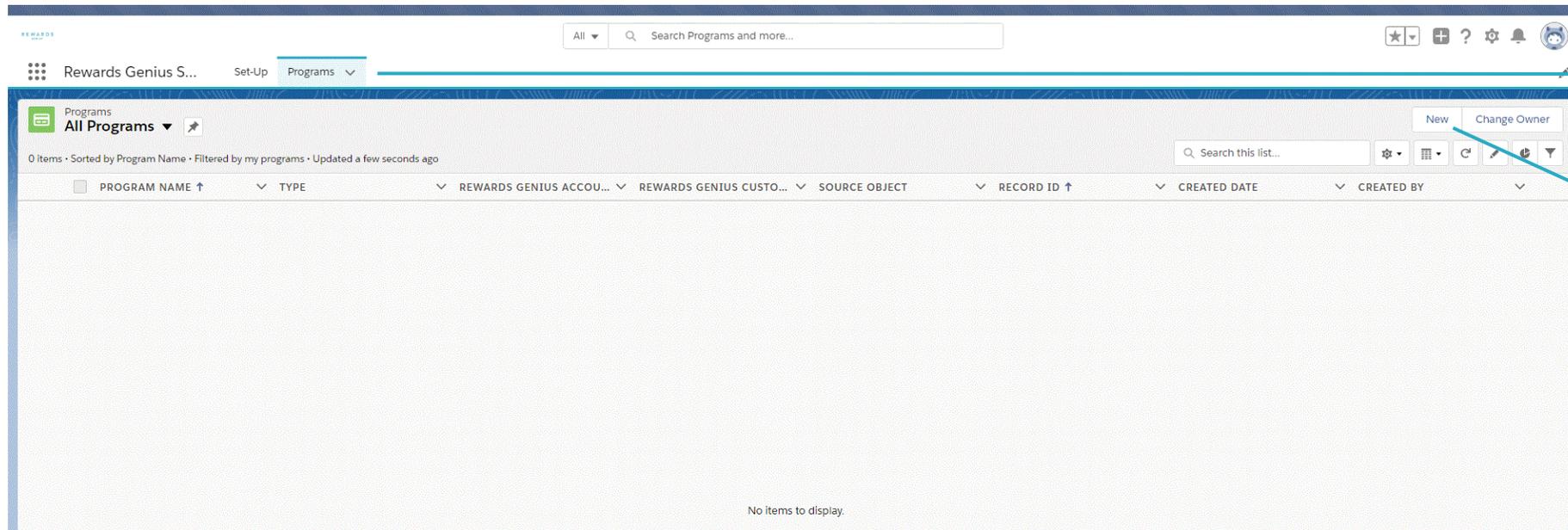
2. Add a custom message, if desired. *NOTE:* You must insert the `{{message}}` tag into the Rewards Genius email template for this custom message to be included in the delivered email.

3. Click **Send Reward**.

# AUTOMATIC PROGRAM SET-UP

# AUTOMATIC PROGRAM SET-UP (1/5)

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

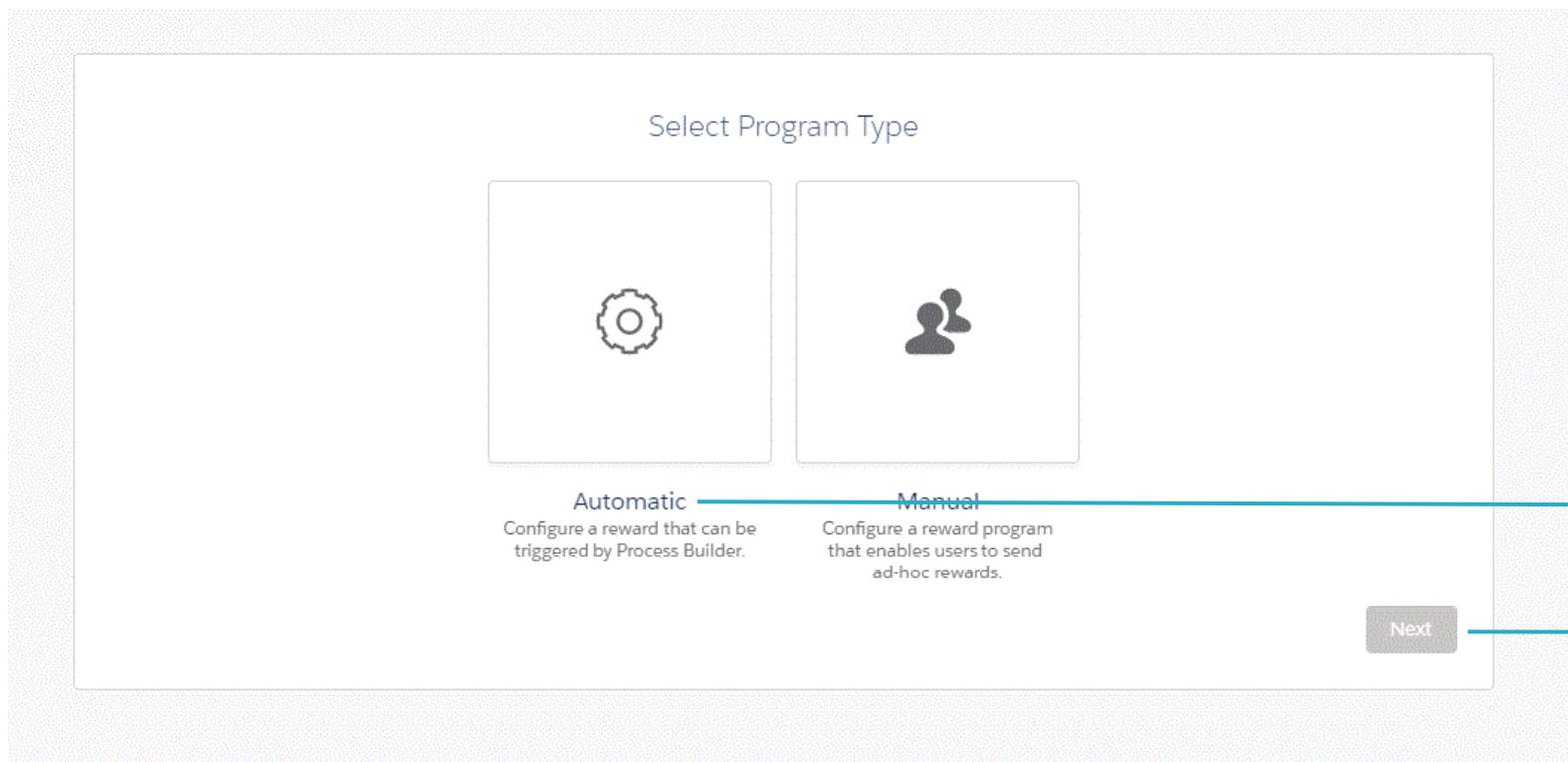


1. Click the **Programs** tab.

2. Click **New**.

# AUTOMATIC PROGRAM SET-UP (2/5)

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.

**Program Details** | Card Details

**Program Details**

\* Program Name   
Complete this field.

\* Group   
Complete this field.

\* Account

\* Email Template

Cancel | Next

**Guidance**

Give your program a name based on how you're using rewards. Then select which Rewards Genius group and account will be used to fund and send those rewards. Please note your account must have enough funds available for rewards to be sent.

Example program names: Sales Incentive, Refer-a-Friend, Rebate, etc.

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)

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](#).

✓

Card Details

### Card Details



**Reward Link Preferred**

A Reward Link is simply the easiest way to give the gift of choice. You'll find dozens of premium gift cards, and with digital delivery you will receive the reward value instantly. You are a few simple clicks away from choosing the gift card you really want.

THE FOLLOWING TERMS AND CONDITIONS APPLY TO REWARD LINK: Reward Link is managed by Tango Card, Inc. Reward Links expire on the date stated on the Reward and are valid within the USA only. Reward Links are issued to Reward Recipient without charge for loyalty, award, or promotional purposes, and are not sold to consumers. Your Reward Link balance may be redeemed for national gift cards and can be accessed at any time by clicking the Reward Link URL. Reward can only be redeemed by the Reward Recipient; Reward cannot be transferred, sold or exchanged. All redemptions are final. Reward Link balances from different programs cannot be combined. No fees apply to Reward Link. Please treat like cash. Please view our full terms of service at <https://www.rewardsgenius.com/reward-link-terms-of-service>. Use of this Reward constitutes acceptance of the Reward Link terms of service. Separate terms and conditions apply after Reward Link redemption based on merchant selected for redemption.

\* Currency Code ▾

USD

\* Available Brands ▾

Reward Link Preferred

\* Enter Amount: ▾

5.00 (From \$0.01 to \$2,000.00)

Back

Exit

Finish

### Guidance

Select which rewards can be sent from your organization. Determine which brand and value limits (if any) to use when creating new rewards.

Please note a specific card and value must be assigned to the program.

2. Select a reward brand and associated reward amount.  
*Note: You must specify a brand and amount for automatic programs.*

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

3. Click **Finish**.

# AUTOMATIC PROGRAM SET-UP (5/5)

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.



## Program Successfully Created!

Now that your program is created, it needs to be added to a process. To do so, set up a process in Process Builder that creates a new Rewards Genius record. Map the following Rewards Genius fields to Object fields triggering the creation of the reward (the source object):

- 1) **Program** should be an **ID** with the value **a0e5C0000007HOQA0**
- 2) **Recipient Email** should be a **Field Reference** to the **Email** field on the source object
- 3) **Recipient First Name** should be a **Field Reference** to the **First Name** field on the source object
- 4) **Recipient Last Name** should be a **Field Reference** to the **Last Name** field on the source object
- 5) **Source Record** should be a **Field Reference** to the **Record ID** on the source object
- 6) **Status** should have a **Picklist** value set to **Pending\***

\*Only rewards with status set to Pending will be queued for delivery to the recipient

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)

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.

## New Process

Process Name\*

API Name\* i

Description

The process starts when\*

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)

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

The screenshot shows the 'Process Builder' interface for a 'Reward - Demo Complete' process. The flowchart on the left starts with a 'START' node, followed by a 'Lead' object node. A decision diamond labeled '+ Add Criteria' follows. The 'TRUE' path leads to an 'IMMEDIATE ACTIONS' box with '+ Add Action', which then leads to a 'STOP' node. The 'FALSE' path leads directly to a 'STOP' node. On the right, the configuration panel is titled 'Choose Object and Specify When to Start the Process'. It has an 'Object \*' dropdown set to 'Lead'. Under 'Start the process \*', the radio button for 'when a record is created or edited' is selected. At the bottom of the panel are 'Save' and 'Cancel' buttons.

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**.

The screenshot shows the 'Process Builder - Reward - Demo Complete' interface. On the left, a flowchart starts with a 'START' node, followed by a 'Lead' node, then a decision diamond labeled '+ Add Criteria'. The 'TRUE' path leads to an 'IMMEDIATE ACTIONS' box with '+ Add Action', and the 'FALSE' path leads to a 'STOP' node. On the right, the 'Define Criteria for this Action Group' panel is open. It includes a 'Criteria Name\*' field with the value 'Lead - Demo Complete'. Under 'Criteria for Executing Actions\*', the 'Conditions are met' radio button is selected. The 'Set Conditions' section contains a table with one row: Field '[Lead].Status', Operator 'Equals', Type 'Picklist', and Value 'Demo Complete'. Below this, the 'All of the conditions are met (AND)' radio button is selected. At the bottom of the panel are 'Save' and 'Cancel' buttons.

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)

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](#).

The screenshot shows the Salesforce Process Builder interface. On the left, a process flow diagram starts with a 'START' node, followed by a 'Lead' object, a decision diamond 'Lead - Demo Complete', and an 'IMMEDIATE ACTIONS' box with a '+ Add Action' button. Below this is another decision diamond 'Add Criteria' and another 'IMMEDIATE ACTIONS' box. On the right, the 'Select and Define Action' configuration panel is open. It includes fields for 'Action Type' (set to 'Create a Record'), 'Action Name' (set to 'Send reward'), and 'Record Type' (set to 'Rewards Genius Reward'). Below these is a 'Set Field Values' table with columns for 'Field', 'Type', and 'Value'. The table contains five rows of field-value pairs. At the bottom of the panel are 'Save' and 'Cancel' buttons.

Field *	Type *	Value *
Program	ID	a0e5C000000OFoUQA
Recipient Email	Field Reference	[Lead].Email
Recipient First Name	Field Reference	[Lead].FirstName
Recipient Last Name	Field Reference	[Lead].LastName
Source Record	Field Reference	[Lead].Id
Status	Picklist	Pending

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.

The screenshot displays the 'Order History' page in the Rewards Genius interface. The top navigation bar shows the user 'test' and a balance of '\$4K'. The page title is 'Order History'. Below the title, there are search filters: 'Search all accounts' (dropdown), 'Reference Order ID' (input field), a search icon, and two 'Select Date' (calendar) inputs. The main content is a table with the following data:

Ref Order Id	Reward(s)	Total	Created	Order Status	External Reference ID	Notes
BE181127-2805-88	Reward Link	\$5.00	Nov 27, 2018 1:58 PM PST	✓ Complete		
RA180911-2120-35	Reward Link	\$10.00	Sep 11, 2018 3:02 PM PDT	✓ Complete		
RA180309-1184-21	Reward Link	\$10.00	Mar 9, 2018 1:53 PM PST	✓ Complete		
RA180302-1168-50	Reward Link	\$10.00	Mar 2, 2018 2:18 PM PST	✓ Complete		
RA180302-1168-16	Reward Link	\$10.00	Mar 2, 2018 9:38 AM PST	✓ Complete		
RA180302-1168-14	Reward Link	\$10.00	Mar 2, 2018 9:33 AM PST	✓ Complete		

A chat icon is visible in the bottom right corner of the interface.

# MANAGE YOUR REWARDS

REWARDS  
GENIUS™  
by Tango Card

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

The screenshot displays the Rewards Genius interface. At the top, a dark header shows the user name 'test' and a balance of '\$4K'. Below the header, the 'ORDER DETAILS' section features a search bar for 'Line ID' with the placeholder text 'Search for an email address, brand, etc...'. A table below lists order items with columns for Line ID, Email, First Name, Reward, Amount, and Status. One item is shown: Line ID 'BE181127-2805-88-1', Email 'meagan.sarratt@tangoc...', First Name 'meagan', Reward 'Reward Link', Amount '\$5.00', and Status 'Delivered'. To the right, a detailed view for 'Line item ID: BE181127-2805-88-1' is shown, with tabs for 'Details' and 'Reward History'. The 'Details' tab is active, showing a timeline of events: 'Delivered' (Nov 27, 2018 9:58 PM PST) with a 'Resend' button, 'Processed' (Nov 27, 2018 9:58 PM PST), and 'Sent' (Nov 27, 2018 1:58 PM PST). All events are associated with the email 'meagan.sarratt@tangocard.com'. A chat icon is visible in the bottom right corner.

Line ID	Email	First Name	Reward	Amount	Status
BE181127-2805-88-1	meagan.sarratt@tangoc...	meagan	Reward Link	\$5.00	Delivered

Line item ID: BE181127-2805-88-1

Details | Reward History

- Delivered** (Nov 27, 2018 9:58 PM PST) [Resend]  
meagan.sarratt@tangocard.com [Open]
- Processed** (Nov 27, 2018 9:58 PM PST)  
meagan.sarratt@tangocard.com
- Sent** (Nov 27, 2018 1:58 PM PST)  
meagan.sarratt@tangocard.com

REWARDS

GENIUS™

by Tango Card

## Additional Resources

- Contact us at [sales@tangocard.com](mailto:sales@tangocard.com).
- Check out the [Salesforce Process Builder help article](#).