



QUICK INTEGRATION GUIDE

Tango for Salesforce

help.rewardgenius.com



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Prerequisites

- Salesforce Enterprise edition—this integration is not supported on professional or starter editions
- Salesforce admin access to install apps, configure lightning pages, and manage permission sets
- Active Tango account—visit <https://tango-portal.tangocard.com/get-started> if you don't have one yet
- Tango API key and platform name—provided by your Tango customer success manager
- Pre-funded Tango account—funds must be available before rewards can be sent
- Desktop browser required—the Tango component does not support Salesforce mobile app or mobile browsers

⚠️ DESKTOP ONLY

The Tango component in Salesforce works in desktop mode only. It is not supported on the Salesforce mobile app or mobile browsers.

Reward delivery methods

Delivery method is configured at the program level by your admin. Choose based on your audience and use case.

	Email	SMS / Text
How delivered	Reward link sent via branded Tango email template	Reward link sent as a text message to mobile number
Availability	All programs	U.S. and Canada (+1) only, 10-digit numbers
Extra requirement	None	Mobile delivery addendum must be signed in Tango portal; not all reward types support SMS
Best for	B2B, employee rewards, customer appeasement	Consumer campaigns, mobile-first audiences

⚠️ SMS DELIVERY REQUIREMENTS

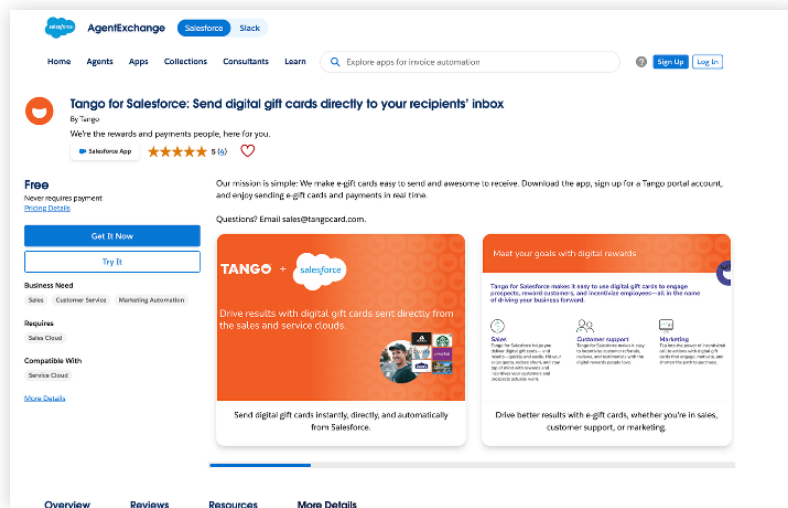
To enable SMS: (1) sign the Mobile delivery addendum in the Tango portal, (2) recipient must have a valid 10-digit U.S. or Canadian number (+1), (3) the reward type must support SMS—not all catalog items are eligible. Contact your Tango customer success manager to get SMS enabled before configuring it in Salesforce.

Setup overview (Salesforce admin)

Setup typically takes under one hour. For the full nine-step technical guide, visit help.rewardsgenius.com.

Step 1: Install from AppExchange

- Search for "Tango for Salesforce" on Salesforce AppExchange
- Select "Install for admins only" and approve third-party access
- Salesforce will email you on successful installation



Step 2: Assign permission sets

The app includes three permission sets—assign each to the right users:

- **Tango setup permissions** – admin configuration access
- **Tango rewards permissions** – allows end users to send and resend rewards
- **Tango program permissions** – allows admins to create and manage reward programs

Step 3: Connect to Tango Portal

- Open the Tango setup app in Salesforce and run the setup wizard
- Enter your Tango platform name and API key, then click "Authorize"
- Select "Production" or "Sandbox environment"
- A green status bar confirms successful connection

Step 4: Add Tango component to Salesforce object(s)

- In Lightning App Builder, add the Tango component to the record pages where rewards will be sent—typically contacts or leads
- Activate the page layout for desktop
- Repeat for any additional objects (opportunities, custom objects, etc.)
- Note: the object must have first name, last name, and email fields for the component to work

Step 5: Create a reward program

- In the Tango setup app, go to Programs and click “New”
- Configure the program:
 - **Name** – internal label for this reward program
 - **Funding account** – which Tango account to draw funds from
 - **Email template** – branded template for reward delivery
 - **Delivery method** – Email or SMS (if SMS addendum is signed)
 - **Catalog items and value range** – which rewards end users can select and at what amounts
- Save—end users can now select this program when sending rewards

Sending a reward (end user)

Once setup is complete, sending a reward from a Salesforce record takes under a minute:

1. Open record	Navigate to the contact, lead, or configured Salesforce object
2. Click New	Scroll to the Tango history section and click “New” to open the Send Tango modal
3. Select program	Choose a reward program from the dropdown
4. Choose delivery	Select email or text (if SMS is enabled for the program)
5. Review and send	Confirm recipient details (auto-filled from the record) and click “Send”
6. Track status	Reward appears in Tango history with real-time status: pending, delivered, or not delivered

FAQ

What Salesforce edition is required?	Salesforce Enterprise edition is required. The Tango app uses custom objects and Lightning components that are not available in professional or starter editions.
Can rewards be sent via Salesforce Flow (automated)?	Yes. Use Salesforce Flow to trigger rewards automatically when key events occur—deal closures, case resolutions, milestone achievements, and more. Your Salesforce admin configures the Flow using the Tango reward action.
What if a reward shows “Not Delivered”?	Go to the Tango history widget on the record, click the dropdown next to the reward, and select Resend Item. Note: rewards can only be resent to the original recipient's email or phone number on the record.
Can I add the Tango component to custom Salesforce objects?	Yes, as long as the object has first name, last name, and email fields. Use Lightning App Builder to add the Tango component to any compatible object's record page.
How do I enable SMS delivery?	SMS requires signing the mobile delivery addendum in the Tango portal before it can be configured in Salesforce. Contact your Tango customer success manager to get this process started. Once signed, your admin enables SMS at the program level.

Next steps

1. Share this guide with your Salesforce admin—full nine-step technical setup is at help.rewardsgenius.com
2. Contact Tango to get your account configured, funded, and your API key and platform name issued
3. If SMS delivery is needed, contact your Tango customer success manager to initiate the mobile delivery addendum
4. Schedule a live demo with your Tango account manager to see the integration in action