

Your first challenge, live in minutes.

Install: ~30 min · First challenge: ~10 min · No Apex required · Salesforce admin access needed

BEFORE YOU START

Salesforce System Admin credentials

Sandbox access (recommended)

Novigem licence confirmed

5-15 pilot users identified

01

~10 min

Install the package

- Go to novigem.com/install and choose sandbox or production.
- Wait for Salesforce to confirm the install. Takes 2-5 minutes.
- In Setup, assign [Novigem Admin](#) to system admins and [Novigem User](#) to your pilot group.
- Optionally add Novigem tabs to your Salesforce app navigation via App Manager.

02

~2 min

Configure general settings

- Go to [Novigem Admin](#) in the top nav, then [Settings -> General](#).
- Leave **Allow Negative Point Balances** off for most teams.
- Turn on **Require Reason for Manual Adjustments** for accountability.
- Set your week start day to match your team's reporting cycle.

03

~5 min

Create 2-3 starter rules

Rules award points automatically when Salesforce records are created or updated. Start simple.

- Go to [Rules](#) and create a rule per behavior. Examples: Deal Closed Won (100 pts) · Meeting Logged (10 pts) · Task Completed (5 pts).
- Set [Is Active](#) to false while testing. Flip to true when ready to go live.

Tip Keep rules tied to actions the rep controls directly. Avoid rewarding outcomes they cannot influence alone.

04

~5 min

Create your first challenge

- Go to [Challenges](#) and click New. Pick one clear behavior to improve.
- Set a 2-4 week window. Add your pilot users as participants.
- Attach the rules you created. Set a completion bonus (e.g. 200 pts).
- Enable the leaderboard so reps see their standing in real time.
- Optionally attach a badge to reward completion.
- Add the [Challenge Celebration](#) Lightning component to your record pages so reps see their progress in context.

05

~2 min

Test, activate, and announce

- Trigger a test action and confirm a ledger entry appears with the right points and user.
- Set your rules to [Is Active = true](#) and launch the challenge.
- Tell your team: what behavior earns points, how long it runs, and where to see the leaderboard.

Need more detail?

Full setup guide, playbooks, and rule examples at docs.novigem.com

[Open docs](#)