

TANGO

Agentforce Extension

Setup Guide

For Salesforce Administrators

Agent Overview

What is the Tango Agentforce Extension?

The Tango Agentforce Extension adds AI-powered reward capabilities to your Salesforce org through Agentforce. Instead of manually deciding when and how much to send, your team can simply describe a situation in natural language, and the Tango agents will analyze the relevant Salesforce data and recommend — or directly send — an appropriate reward.

The extension includes three pre-built sub-agents:

- **Tango Reward** — Sends a reward on request. Ideal for straightforward, on-demand sending (e.g., “Send Sarah a \$25 reward”).
- **Contact Nurturing Advisor** — Reviews a contact's engagement data (email activity, call history, meetings, campaign responses, open opportunities, company size, account rating) and recommends whether — and how much — to send a reward to strengthen the relationship.
- **Lead Nurturing Advisor** — Reviews a lead's engagement data (email opens, website visits, lead score, company size, activity recency) and recommends whether — and how much — to send a reward to re-engage a cold or stalled lead.

All rewards are sent as a Choice Reward — a single pre-configured reward type that lets recipients pick from 500+ brand options. The reward type, brand catalog, and currency are set once by the admin (see [Configure the Agent Setup Tab](#), below); the agents only ever decide the dollar amount, based on the engagement signals they see.

A Note on Customization

The instructions, decision logic, and data fields referenced throughout this guide (and pre-loaded into each sub-agent) are built against standard Salesforce Lead and Contact objects and common engagement fields. These defaults are a starting point, not a fixed requirement.

Every sub-agent's instructions, scope, and decision thresholds (for example, what counts as a “high-engagement” lead, or the reward amount tied to company size) can be edited in Agentforce Builder to match your own business rules, field names, and object model — including custom objects, if your org tracks engagement differently.

We recommend reviewing each sub-agent's Topics and Instructions (see [Review Topics and Instructions](#), below) closely with whoever owns your Salesforce data model, rather than assuming the default logic fits your process as-is.

Before You Begin

Confirm Agentforce Is Enabled

The Tango Agentforce Extension runs on top of Salesforce Agentforce. Before starting any of the steps below, confirm the following in your org:

☐	Prerequisite
☐	Agentforce is enabled in your org (Agentforce Sales, Service, or the applicable Agentforce license/add-on is provisioned).
☐	You have at least one active Agentforce conversation allocation (Flex Credits or included conversations, depending on your license).
☐	You have System Administrator access, or a role with permission to install packages and manage permission sets.

If you're not sure whether Agentforce is enabled, check Setup → Agentforce Studio → Agentforce Agents, or contact your Salesforce Account Executive. This must be in place before sub-agents can be added or activated — installing the Tango package without an Agentforce license will not enable the AI features.

Confirm Your Data Is Ready

The Lead Nurturing Advisor and Contact Nurturing Advisor rely on specific fields being present and populated on your Lead and Contact records. If these fields are missing or empty, the agents may give inaccurate recommendations or fail silently. Confirm the following before adding these two sub-agents.

For Lead Nurturing Advisor:

☐	Data Field
☐	Lead Score field exists and is actively populated (via a scoring model, campaign tool, or manual process).
☐	Email engagement tracking is enabled and populated (email open count, or equivalent field from your email/marketing tool).
☐	Website visit tracking is available, if you want the agent to factor in site activity (optional, but recommended).
☐	Company Size (employee count) field exists and is populated for most leads.
☐	Lead Status values match what the agent's instructions expect (e.g., “Contacted,” “Working,” “Closed-Lost”) — if your org uses different status names, this must be updated in the agent's instructions.
☐	Lead creation date and Last Activity Date are populated and accurate (used to judge “too early” vs. “cold”).

For Contact Nurturing Advisor:

☐	Data Field
☐	Email activity history is tracked and accessible (opens, replies, or equivalent).
☐	Call history / activity logging is in place for contacts (if your team wants call activity factored in).
☐	Meeting history is tracked (via Salesforce Activities or a connected calendar tool).

☐	Data Field
☐	Campaign response data is populated, if campaign engagement should influence recommendations.
☐	Open Opportunity data is accurate and linked to the Contact/Account.
☐	Company size and account rating fields exist and are populated at the Account level.

For both advisors — reward tracking:

☐	Data Field
☐	A lookup field exists linking Tango_Reward__c to Lead and/or Contact, so the agent can check for a recent/previous reward.
☐	Reward Amount and Created Date are captured on each Tango_Reward__c record (needed to enforce cooldown periods, e.g., “don't reward the same lead twice in 30 days”).

If any of the above are missing: decide whether to build/populate the field before go-live, substitute a comparable field you already have, or exclude that signal from the agent's decision logic (update its instructions accordingly under Review Topics and Instructions).

Do not activate the affected sub-agent until this is resolved — a sub-agent making recommendations on missing data is worse than not having the sub-agent at all, since it will produce confident-sounding but wrong advice.

Choose Your Setup Path

Follow the path that matches your current setup. All three paths lead into the same Common Setup Steps (next section).

- Path A — You already use Tango SF, version 1.59 (1GP package)
- Path B — You already use Tango SF, version 1.60 (1GP package)
- Path C — You are installing Tango SF for the first time

Path A — Upgrading from Tango SF v1.61 (1GP) or below

1. Upgrade to Tango SF v1.62 (1GP). Instructions and the upgrade link will be sent to your admin via email and posted in our Help Center. Tango SF 1GP v1.62 prerequisite:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tao000005dRFB>
2. Upgrade from v1.62 (1GP) to v1.62 (2GP). This upgrade is available via AppExchange, a direct installation link, or an automatic push upgrade — your Tango account team will confirm which method applies to your org. Public Salesforce Marketplace (2GP - V1.62) : [Tango for Salesforce: Send digital gift cards directly to your recipients' inboxes from Salesforce |...](#)
3. Continue to Common Setup Steps, below.

Path B — Upgrading from Tango SF v1.62 (1GP)

1. Upgrade from v1.62 (1GP) to v1.62 (2GP). This upgrade is available via AppExchange, a direct installation link, or an automatic push upgrade — your Tango account team will confirm which method applies to your org. Marketplace (2GP - V1.62) : [Tango for Salesforce: Send digital gift cards directly to your recipients' inboxes from Salesforce |...](#)
2. Continue to Common Setup Steps, below.

Path C — New Tango SF Installation

1. Install Tango SF v1.62 (2GP) from Salesforce AppExchange. Marketplace (2GP - V1.62) : [Tango for Salesforce: Send digital gift cards directly to your recipients' inboxes from Salesforce |...](#)
2. Complete the standard Tango SF connection setup (System Connections): enter your API key and account name, and confirm the success message. This is the same base setup required for any new Tango SF installation.
3. Continue to Common Setup Steps, below.

Note: separate install

The Tango Agentforce Extension is a separate package from the base Tango SF app. Installing Tango SF v1.62 (2GP) does not include the Agentforce Extension — that is installed separately as Step 1 of Common Setup Steps, below.

Common Setup Steps (All Paths)

Once your org is on Tango SF v1.62 (2GP), complete the following steps in order to install the Agentforce Extension and configure your Tango agents.

Step 1: Install the Tango Agentforce Extension

The Agentforce Extension is installed separately from the base Tango SF package, from Salesforce AgentExchange.

1. Confirm Tango SF v1.62 (2GP) is already installed in your org (see Choose Your Setup Path, above).
2. Go to the Tango Agentforce Extension listing on AgentExchange and click Get It Now / Install.
3. Follow the Salesforce installer prompts to complete the install in your org.

User permissions set mapping step

Setup

Home

Object Manager

users

Users

Analytics Groups

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

Search Setup

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users

Create New User

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
☐	Edit Chatter Expert	Chatter	chatty.00df00000x1axheab.mqbtphoethob@chatter.salesforce.com		☒	Chatter Free User
☐	Edit EPIC_OrgFarm	DEPIC	ecic.95271a9e454c@orgfarm.salesforce.com		☒	System Administrator
☐	Edit Jose, Daniel	dan	daniel.ci.625562bbaed@agentforce.com		☒	System Administrator
☐	Edit User_Integration	integ	integration@00df00000x1axheab.com		☒	Analytics Cloud Integration User
☐	Edit User_Security	sec	insightssecurity@00df00000x1axheab.com		☒	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Search Setup

Users

Permission Set Assignments

Edit Assignments

Action	Permission Set Name	Date Assigned	Expires On
Del	Data Cloud Architect	7/21/2026	
Del	Agentforce Default Admin	7/21/2026	
Del	Promot_Template Manager	7/21/2026	
Del	Agentforce Service Agent Configuration	7/21/2026	
Del	Service Cloud User	7/21/2026	

Show 3 more

Go to list (8)

Edit Assignments

Permission Set Assignments: Activation Required

Permission Set Name	Date Assigned	Expires On
---------------------	---------------	------------

Edit Assignments

Permission Set Group Assignments

No records to display

Edit Assignments

Permission Set License Assignments

Action	Permission Set License Label	Date Assigned
Del	Agentforce (Default)	7/21/2026
Del	Agentforce Service Agent Builder	7/21/2026
Del	Data Cloud	7/21/2026
Del	Einstein Drivem Template	7/21/2026

Setup Home Object Manager

Search Setup

users

Users

- Analytics Groups
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings

Users

- Feature Settings
- Data.com
- Prospector Users

Didn't find what you're looking for?
Try using Global Search.

SETUP

Permission Sets

Permission Set Assignments

Daniel Jose

Save Cancel

Available Permission Sets

- Seller-Focused Sales Mobile Experience
- Shopper
- Slack Service User
- Standard Einstein Activity Capture
- Tableau Next Limited Consumer
- Tango Agent
- Tango Agent Config Admin
- Use Enablement Programs
- ZosEventPumpC2CPermSet

Add Remove

Enabled Permission Sets

- Agentforce Default Admin
- Agentforce Service Agent Configuration
- Data Cloud Architect
- Prompt Template Manager
- Service Cloud User
- Tango Program Permissions
- Tango Rewards Permissions
- Tango Setup Permissions

Save Cancel

Setup Home Object Manager

Search Setup

users

Users

- Analytics Groups
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings

Users

- Feature Settings
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- Prospector Users

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SETUP

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Permission Set Assignments

Daniel Jose

Save Cancel

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- Seller-Focused Sales Mobile Experience
- Shopper
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- Standard Einstein Activity Capture
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- ZosEventPumpC2CPermSet

Add Remove

Enabled Permission Sets

- Agentforce Default Admin
- Agentforce Service Agent Configuration
- Data Cloud Architect
- Prompt Template Manager
- Service Cloud User
- Tango Agent Config Admin
- Tango Program Permissions
- Tango Rewards Permissions
- Tango Setup Permissions

Save Cancel

Step 2: Add the Agent Setup Tab In Tango Setup App

The extension adds a new Agent Setup tab, but it needs to be added to your Tango app's navigation before you can use it.

- In Setup, go to App Manager, find the Tango Setup app in the list, and click Edit.
- Go to Navigation Items, search for “Agent Setup” under Available Items, and move it to Selected Items.
- Click Save.

Setup

Home

Object Manager

Search Setup

app manager

App Manager

External Client Apps

External Client App Manager

Lightning Out 2.0 Apps

Lightning Out 2.0 App Manager

Didn't find what you're looking for?
Try using Global Search.

SETUP

Lightning Experience App Manager

New Lightning App

New External Client App

31 Items • Sorted by App Name • Filtered by All app menu items • TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Da...	App Type	Visi...
11 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	5/26/2026, 9:00 AM	Lightning	✓
12 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	5/26/2026, 9:00 AM	Lightning	✓
13 Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	5/26/2026, 9:35 AM	Lightning (Managed)	✓
14 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	5/26/2026, 9:00 AM	Lightning	✓
15 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	5/26/2026, 9:00 AM	Lightning	✓
16 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	5/26/2026, 9:00 AM	Classic	✓
17 My Service Journey	MSJApp	Discover new customer service capabilities.	5/26/2026, 9:00 AM	Lightning	✓
18 Platform	Platform	The fundamental Lightning Platform	5/26/2026, 9:00 AM	Classic	✓
19 Queue Management	QueueManagement	Create and manage queues for your business.	5/26/2026, 9:00 AM	Lightning	✓
20 Sales	Sales	The world's most popular sales force automation (SFA) solution	5/26/2026, 9:00 AM	Classic	✓
21 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	5/26/2026, 9:00 AM	Lightning	✓
22 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	5/26/2026, 9:00 AM	Lightning	✓
23 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	5/26/2026, 9:00 AM	Lightning	✓
24 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	5/26/2026, 9:00 AM	Classic	✓
25 Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	5/26/2026, 9:06 AM	Lightning	✓
26 Service	Service	Manage customer service with accounts, contacts, cases, and more	5/26/2026, 9:00 AM	Classic	✓
27 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across cu...	5/26/2026, 9:00 AM	Lightning	✓
28 Shield	Shield	Monitor your Salesforce apps and data. Discover, track, and encrypt sensitive inf...	5/26/2026, 9:00 AM	Lightning	✓
29 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com applica...	5/26/2026, 9:00 AM	Classic	✓
30 Subscription Manageme...	RevenueCloudConsole	Get started automating your revenue processes	5/26/2026, 9:00 AM	Lightning	✓
31 Tango Setup	Tango_Setup	Set up and configure your Tango Integration	7/20/2026, 12:04 PM	Lightning (Managed)	✓

App Manager — locate the Tango Setup app in the list and click Edit to add the new Agent Setup tab.

Lightning App Builder

App Settings

Pages

Tango Setup

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

agent setup

Agent Setup

Selected Items

Setup

Programs

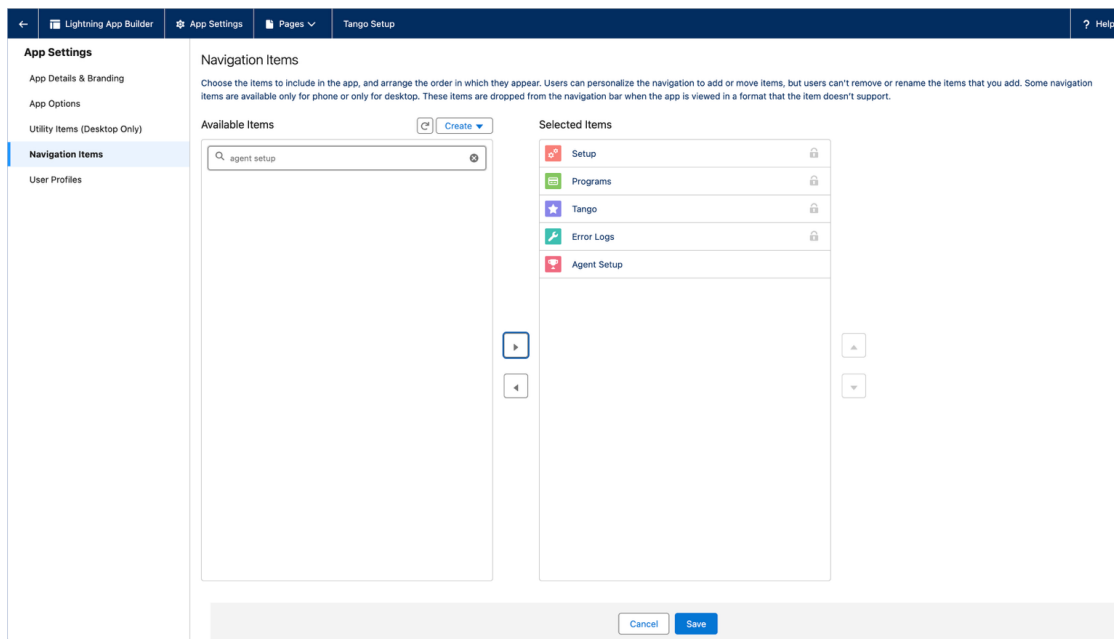
Tango

Error Logs

Cancel

Save

Navigation Items — “Agent Setup” found under Available Items, ready to move into Selected Items.



Navigation Items — “Agent Setup” has been added to Selected Items. Click Save to confirm.

Step 3: Configure the Agent Setup Tab

This is where you configure the default reward details the agents will use when sending rewards on your team's behalf.

7. Navigate to Tango Setup → Agent Setup.
8. Complete the required fields: Group and Account (your Tango account details), Email Template (used for reward delivery emails), Currency Code, Brand Key (reward brand/catalog configuration), and Reward Amount / face value (the default denomination(s) available to the agents).
9. Click Save Configuration.

Agent Setup tab in Tango Setup — configure reward denomination, brand, currency, and account details, then click Save Configuration.

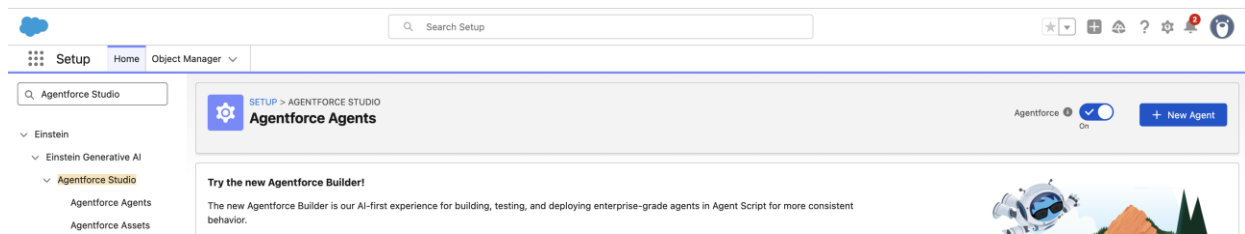
Step 4: Create or Select Your Agentforce Agent

Important

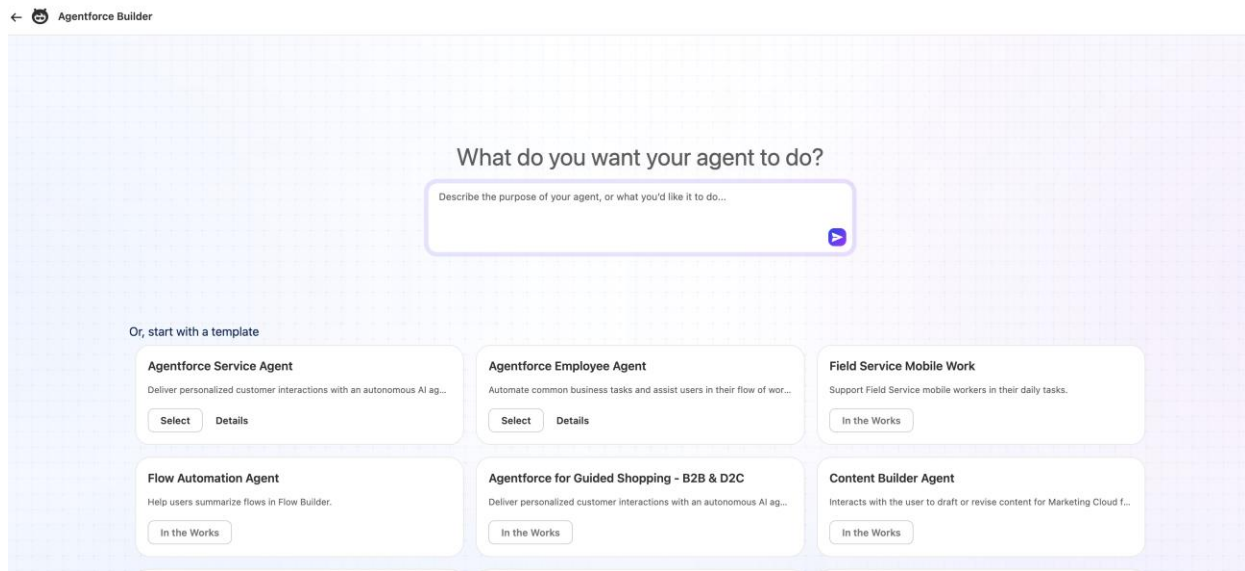
Tango sub-agents currently support the Agentforce Employee Agent template only. If your org's existing agent uses a different template, create a new agent using the Employee Agent template rather than trying to add the Tango sub-agents to an incompatible agent.

10. In Setup, search for and open Agentforce Studio → Agentforce Agents. Confirm the Agentforce toggle is switched On.

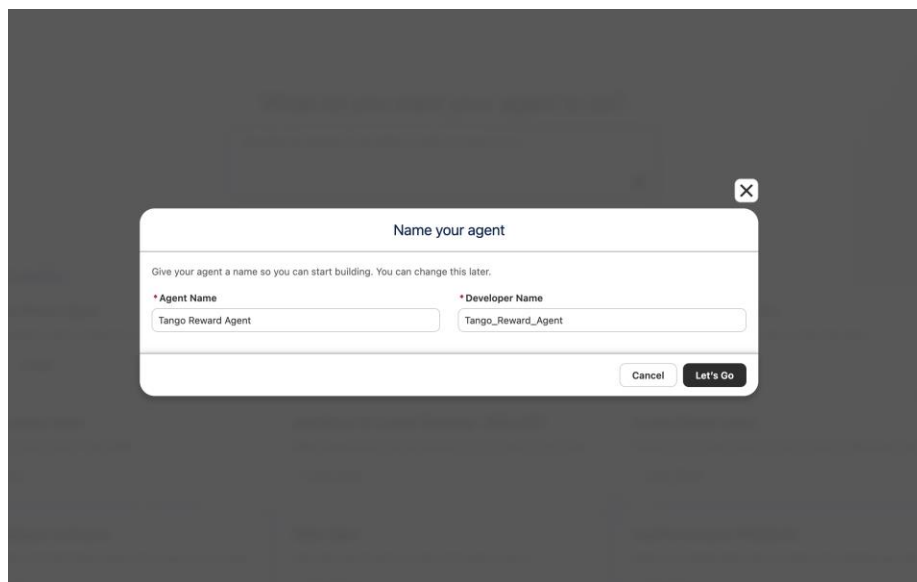
11. Click New Agent to create a new agent, or open an existing Agentforce Employee Agent if you already have one you'd like to extend.
12. If creating a new agent, select the Agentforce Employee Agent template.
13. Enter an Agent Name and Developer Name (e.g., “Tango Reward Agent”), then click Let's Go.



Setup → Agentforce Studio → Agentforce Agents — confirm Agentforce is toggled On, then click New Agent.



Agentforce Builder — choose a template. Select “Agentforce Employee Agent.”



Name your agent — enter an Agent Name and Developer Name, then click Let's Go.

Step 5: Add the Tango Sub-Agents

The Tango Agentforce Extension includes three pre-built sub-agents:

- Tango Reward — sends a reward on request, using the reward type, brand, and currency configured in Step 3.
- Contact Nurturing Advisor — reviews contact engagement data and recommends whether (and how much) to send a reward to strengthen a customer relationship.
- Lead Nurturing Advisor — reviews lead engagement data and recommends whether (and how much) to send a reward to re-engage a cold or stalled lead.

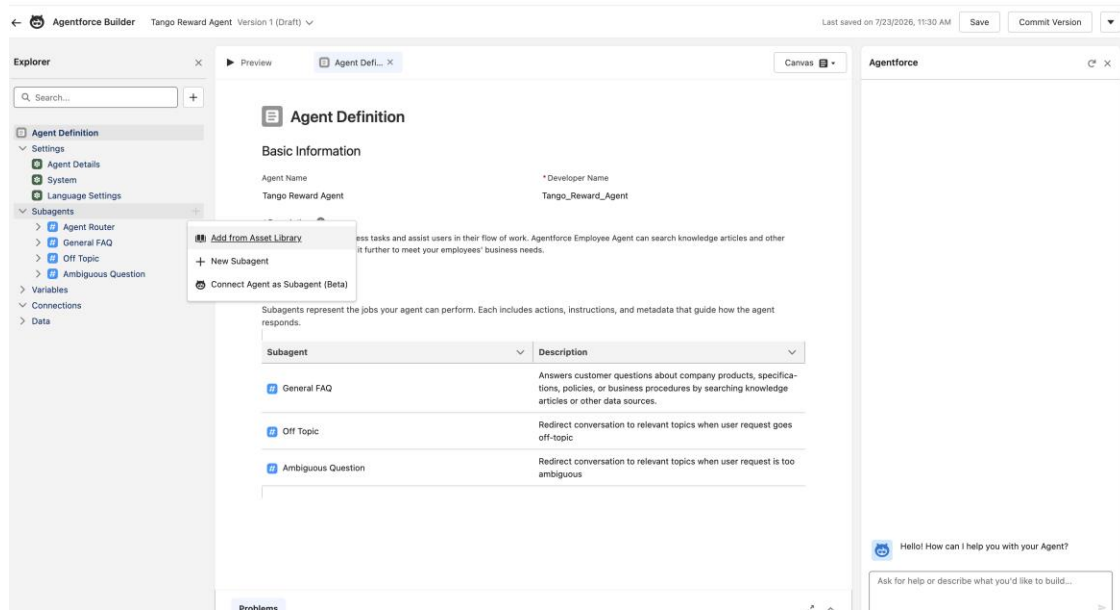
In Agentforce Builder, open your agent's Agent Definition page and add each sub-agent from the Asset Library, one at a time. Add Tango Reward first, then the two advisors.

14. In the Subagents panel, click the + icon and choose Add from Asset Library.

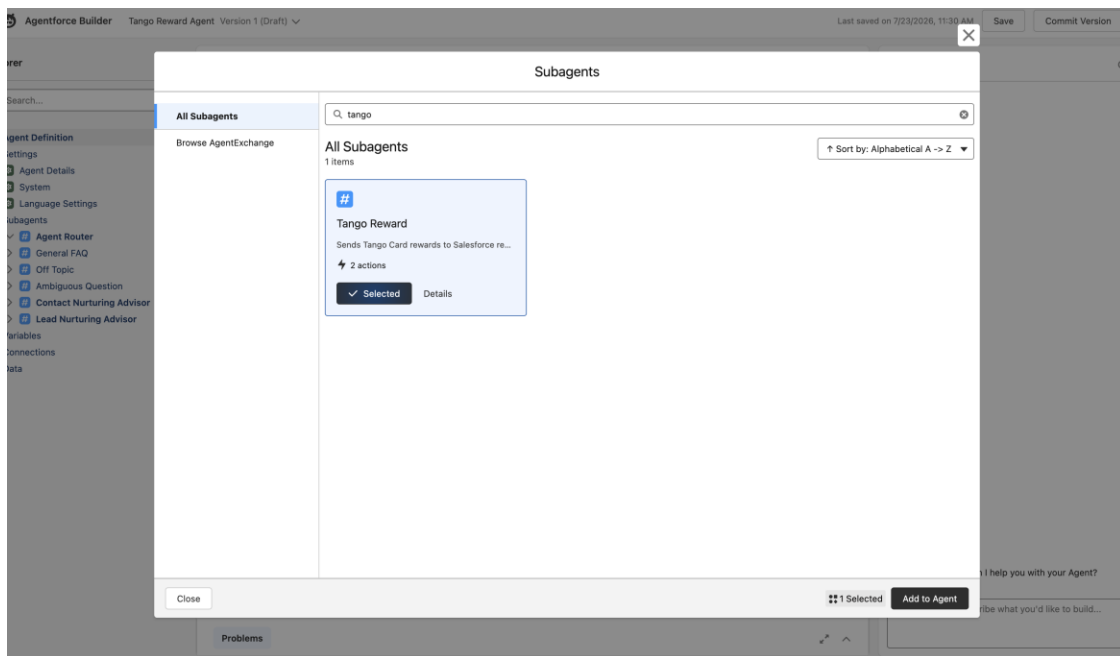
15. Search the Asset Library for Tango Reward and add it.

16. Repeat to add Contact Nurturing Advisor.

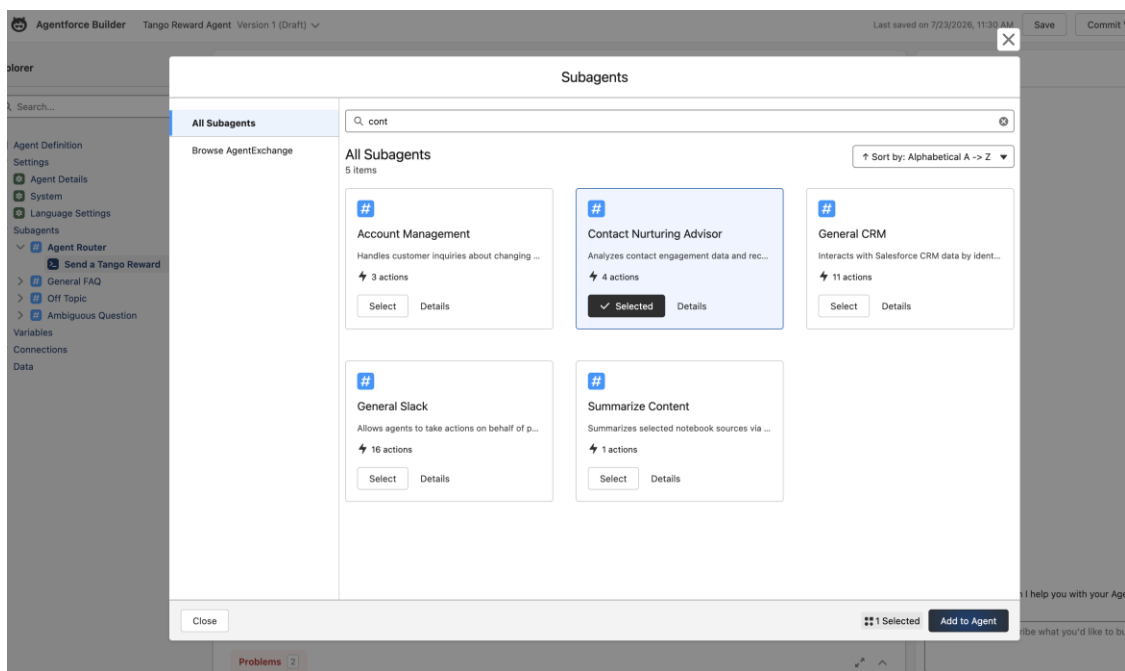
17. Repeat again to add Lead Nurturing Advisor.



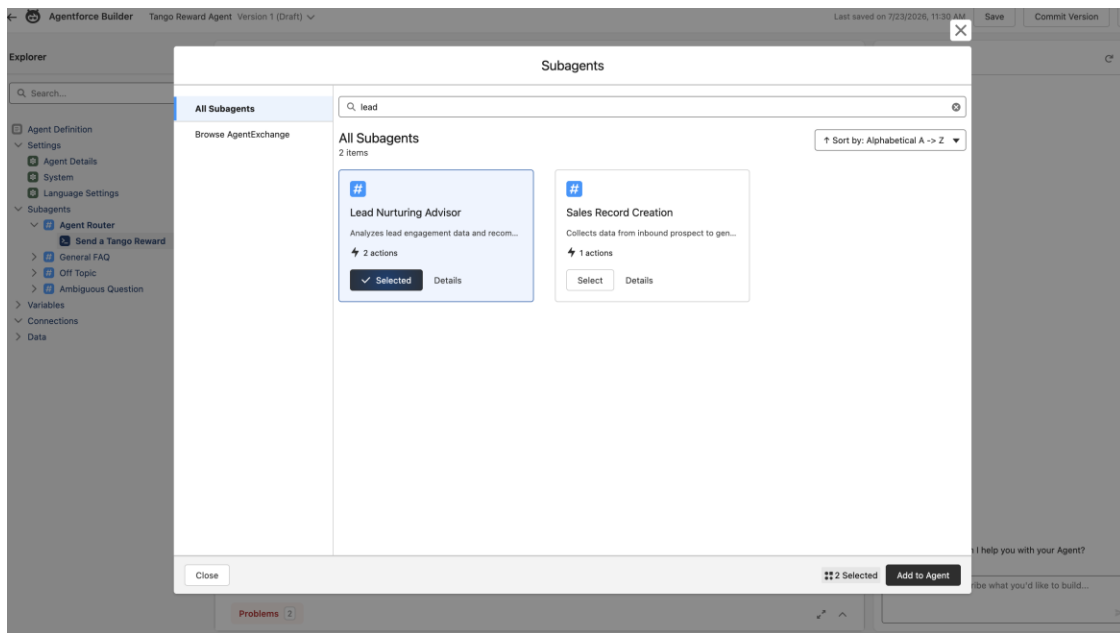
Agent Definition page — click the + next to Subagents, then choose Add from Asset Library.



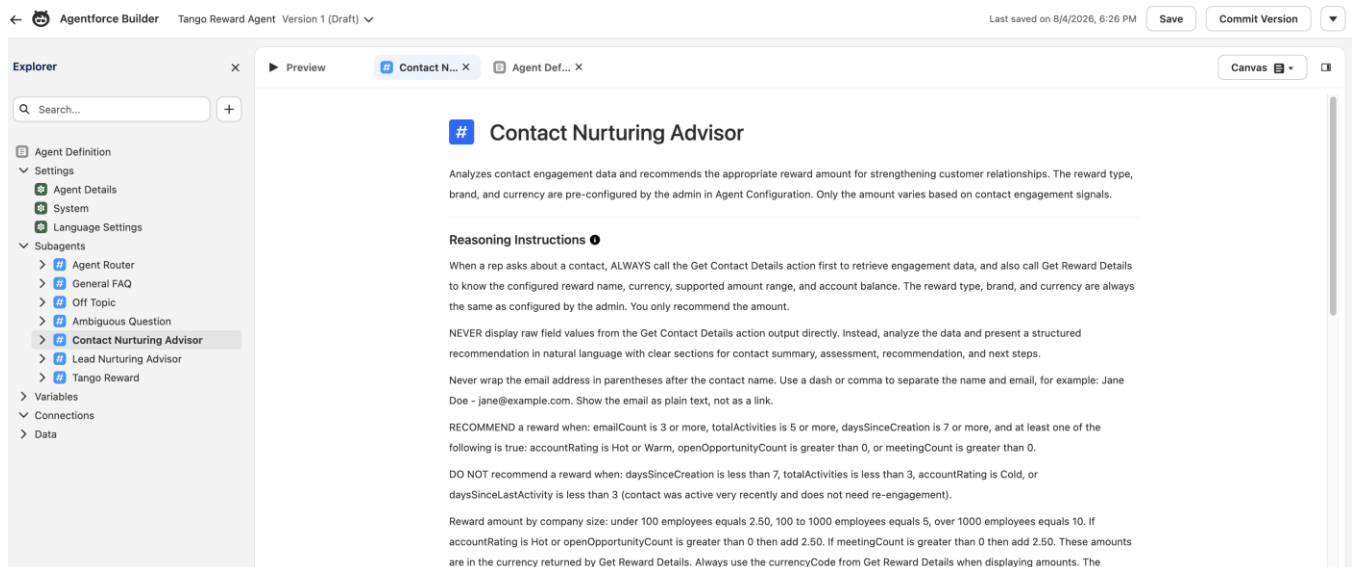
Search the Asset Library and add Tango Reward first.



Add Contact Nurturing Advisor from the Asset Library next.



Add Lead Nurturing Advisor last. All three Tango sub-agents should now appear in your Subagents list.



Click on - Save and “Commit Version”

Agentforce Builder Tango Reward Agent Version 1 (Committed) Last saved on 8/4/2026, 6:27 PM New Version Activate

Explorer

Search...

- Agent Definition
 - Settings
 - Agent Details
 - System
 - Language Settings
 - Subagents
 - Agent Router
 - General FAQ
 - Off Topic
 - Ambiguous Question
 - Contact Nurturing Advisor
 - Lead Nurturing Advisor
 - Tango Reward
 - Variables
 - Connections
 - Data

Preview

Contact N... X Agent Def... X

Canvas

Contact Nurturing Advisor

Analyzes contact engagement data and recommends the appropriate reward amount for strengthening customer relationships. The reward type, brand, and currency are pre-configured by the admin in Agent Configuration. Only the amount varies based on contact engagement signals.

Reasoning Instructions

When a rep asks about a contact, ALWAYS call the Get Contact Details action first to retrieve engagement data, and also call Get Reward Details to know the configured reward name, currency, supported amount range, and account balance. The reward type, brand, and currency are always the same as configured by the admin. You only recommend the amount.

NEVER display raw field values from the Get Contact Details action output directly. Instead, analyze the data and present a structured recommendation in natural language with clear sections for contact summary, assessment, recommendation, and next steps.

Never wrap the email address in parentheses after the contact name. Use a dash or comma to separate the name and email, for example: Jane Doe - jane@example.com. Show the email as plain text, not as a link.

RECOMMEND a reward when: emailCount is 3 or more, totalActivities is 5 or more, daysSinceCreation is 7 or more, and at least one of the following is true: accountRating is Hot or Warm, openOpportunityCount is greater than 0, or meetingCount is greater than 0.

DO NOT recommend a reward when: daysSinceCreation is less than 7, totalActivities is less than 3, accountRating is Cold, or daysSinceLastActivity is less than 3 (contact was active very recently and does not need re-engagement).

Reward amount by company size: under 100 employees equals 2.50, 100 to 1000 employees equals 5, over 1000 employees equals 10. If accountRating is Hot or openOpportunityCount is greater than 0 then add 2.50. If meetingCount is greater than 0 then add 2.50. These amounts are in the currency returned by Get Reward Details. Always use the currencyCode from Get Reward Details when displaying amounts. The recommended amount must fall within the min and max values returned by Get Reward Details.

Format the recommendation using these EXACT bold markdown section headers, each on its own line, in this order:

****Contact Summary****

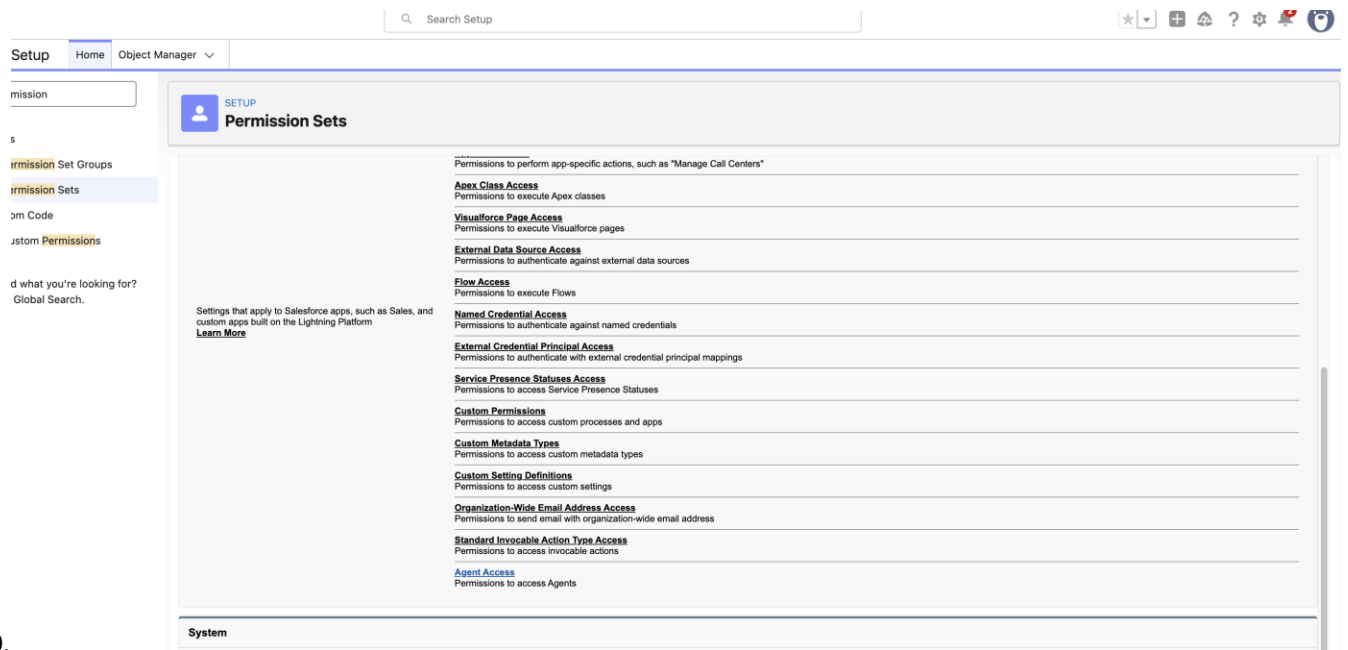
Show name and email on one line as "Name - email" (plain text, no parentheses, no link), then account, company size, and account rating. Then

Click on “Activate”

Step 6: Review Topics and Instructions

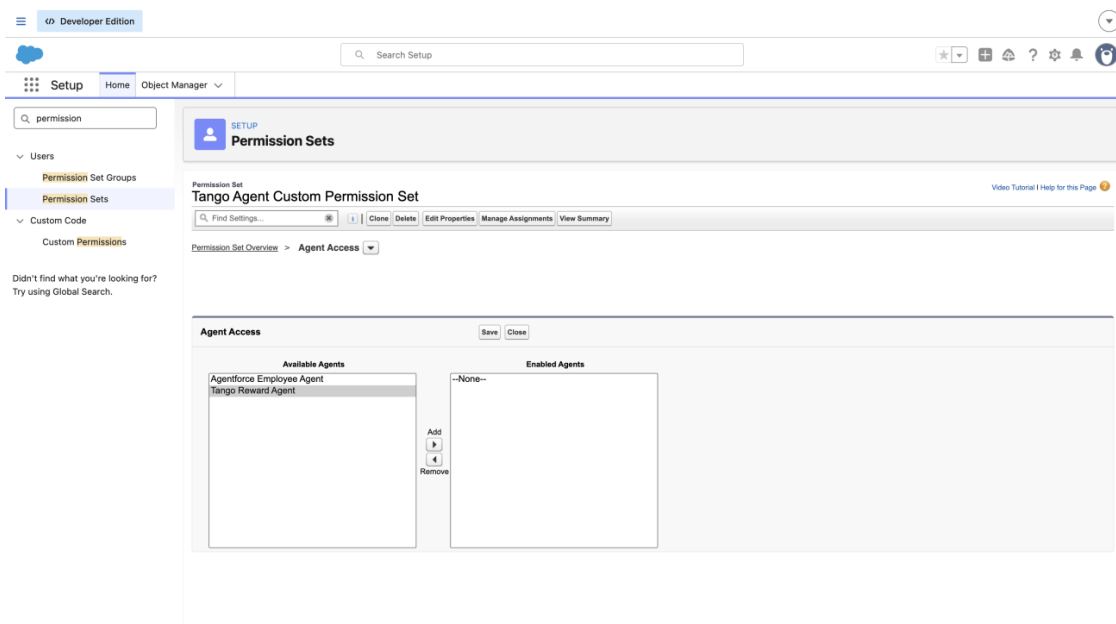
Each sub-agent's topics, instructions, and actions are pre-configured with recommended defaults (reward amount logic, guardrails, and escalation rules). Review these against your own business rules and adjust if needed — for example, your reward amount tiers, minimum lead score thresholds, or approval limits.

- Review each sub-agent's Instructions and Scope for accuracy.
- Confirm the Actions attached to each sub-agent are mapped correctly.
- Adjust guardrails (maximum reward amount, cooldown periods, escalation rules) to match your company's policies.

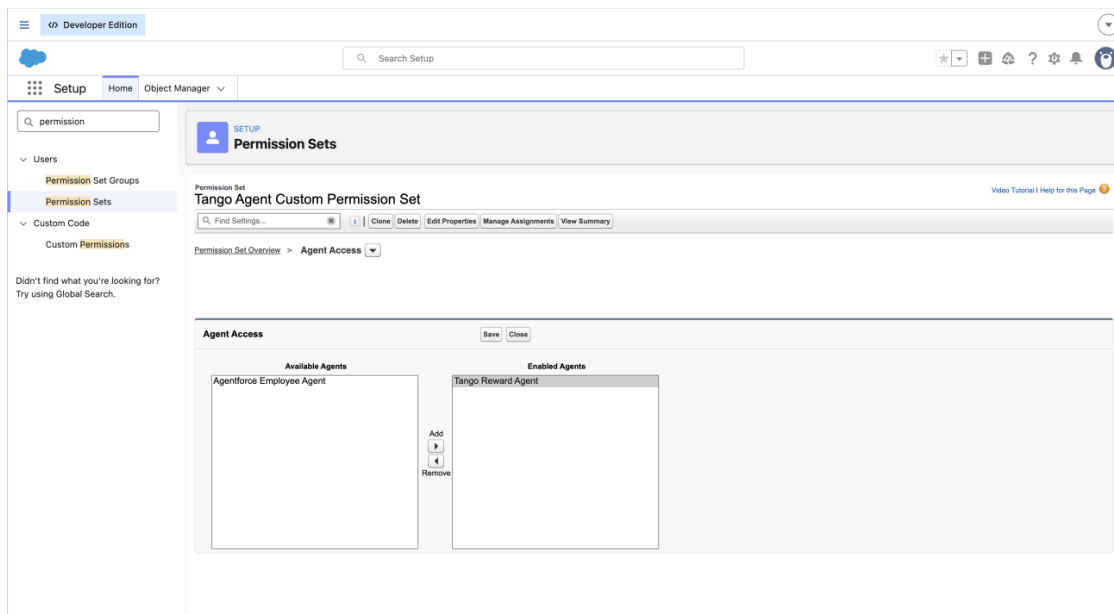


20.

21. Assign this permission set to every user who should be able to use the Tango agent.

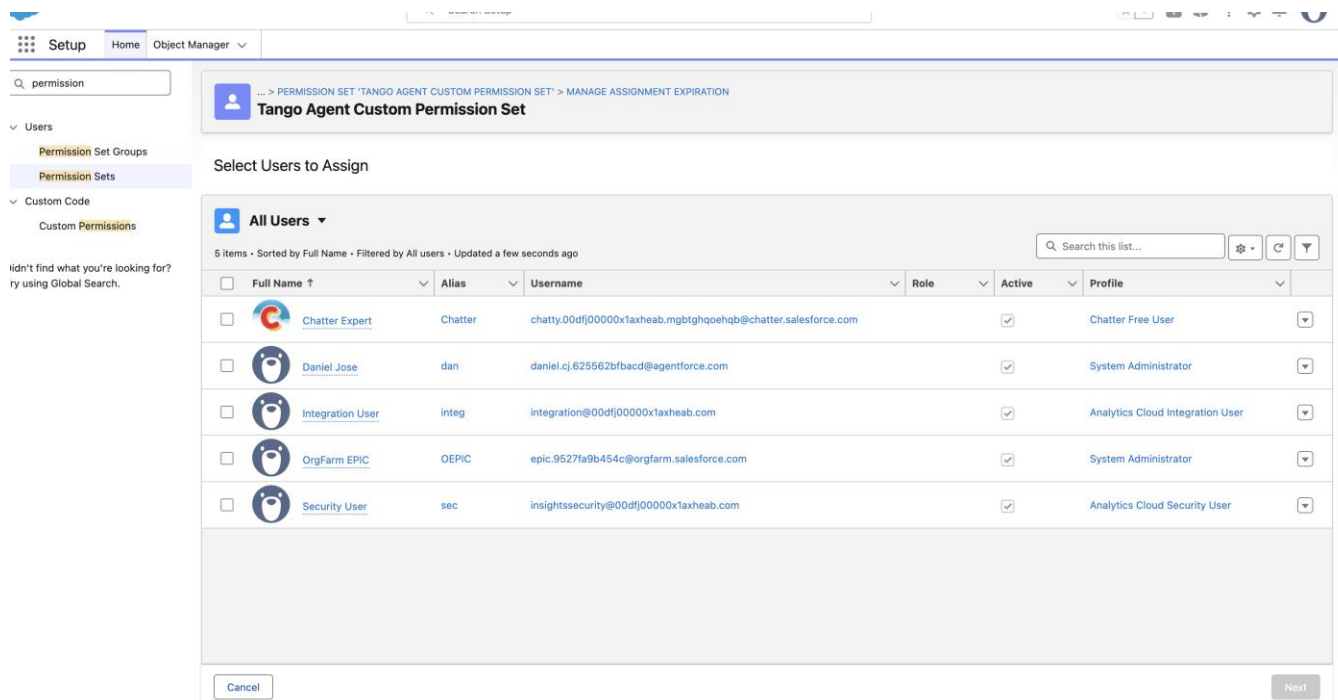


Permission Sets — Agent Access, before the Tango agent has been enabled (Available Agents list).



Permission Sets — Agent Access, after moving the Tango agent into Enabled Agents.

Manage assignment for required user



Setup

Home

Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

... > PERMISSION SET 'TANGO AGENT CUSTOM PERMISSION SET' > MANAGE ASSIGNMENT EXPIRATION

Tango Agent Custom Permission Set

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day

1 Week

30 Days

60 Days

Custom Date

Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Daniel Jose		System Administrator	✓	Salesforce	Never Expires

Cancel

Back

Assign

Step 8: Test and Activate

Before activating the agent for your full team, run through the Pre-Activation Test Checklist (next section) using the Conversation Preview panel in Agentforce Builder. Once testing passes, click Activate on the agent.

Pre-Activation Test Checklist

Use the Conversation Preview panel in Agentforce Builder to run through this checklist before activating the agent for your team.

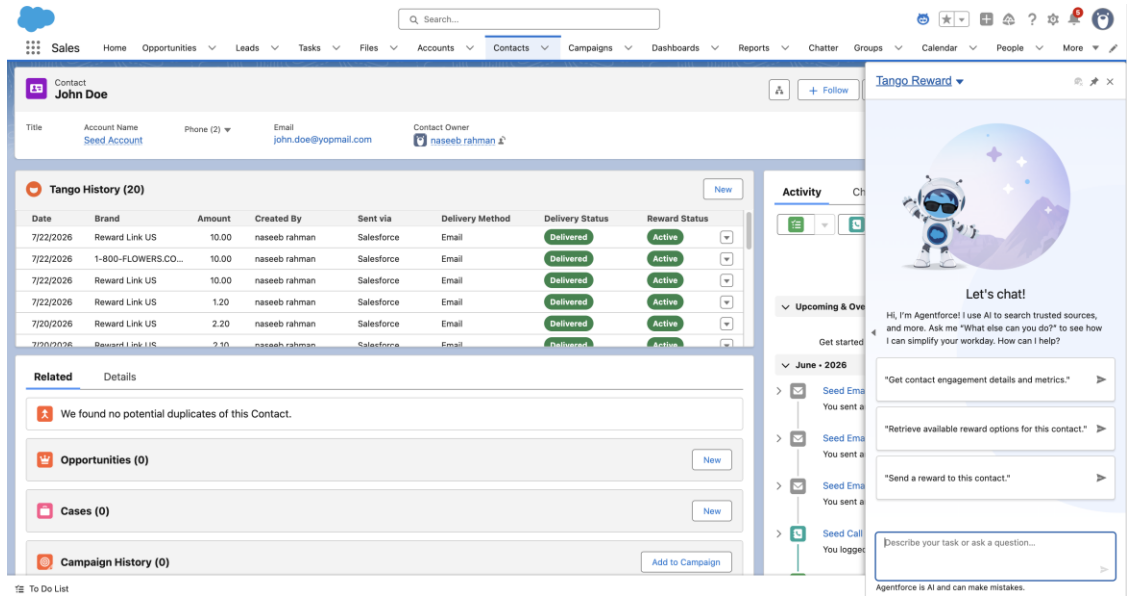
☐	Test Step
☐	Confirm your Agentforce license/allocation is active and the agent appears in Agentforce Builder.
☐	Open Conversation Preview and start a new conversation.
☐	Test the Tango Reward sub-agent: type “I want to send a reward,” provide a test amount and recipient, and confirm the reward is created (check for a new Tango_Reward__c record).
☐	Test the Lead Nurturing Advisor with a real or test lead that should qualify for a reward (high engagement, lead score 60+) — confirm it recommends sending, with a reasonable amount.
☐	Test the Lead Nurturing Advisor with a lead that should NOT qualify (created less than 7 days ago, or low engagement) — confirm it recommends waiting rather than sending.
☐	Repeat the qualify / don't-qualify test for the Contact Nurturing Advisor using a test contact.
☐	Confirm guardrails work as expected — e.g., attempt a reward above your configured maximum and confirm it is blocked or flagged for approval.
☐	Check Tango Setup → Error Logs for any failures generated during testing.
☐	Confirm a test user with the Tango permission set can see and use the agent, and a user without it cannot.
☐	Once all checks pass, click Activate on the agent in Agentforce Builder.
☐	Run one final live test with an actual sender user (not an admin) after activation to confirm end-to-end functionality.

If any step fails, check the Error Logs tab in Tango Setup first — most issues trace back to missing configuration in the Agent Setup tab (Step 3) or a missing field on the Lead/Contact record (see Confirm Your Data Is Ready, above).

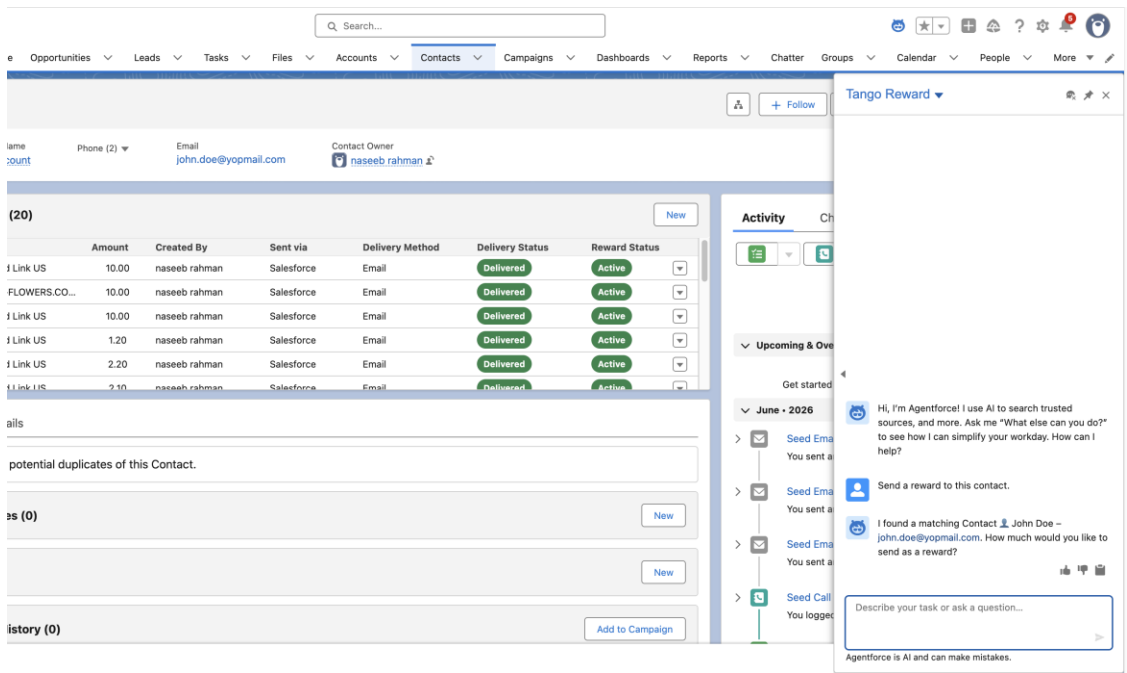
See It In Action: Sending a Reward from a Contact Record

This walkthrough supplements the checklist above with a visual example of the Tango Reward sub-agent in everyday use — useful for training reps once the agent is live.

- 22. Open a Contact record. The Tango Reward panel appears with suggested prompts, including “Send a reward to this contact.”
- 23. Select or type a request to send a reward. The agent will prompt for any missing details it needs, such as the reward amount.
- 24. Confirm the details when asked. The agent processes the request and sends the reward.
- 25. The new reward appears in the Contact's Tango History related list, confirming it was sent successfully.



Contact record with the Tango Reward panel open, showing suggested prompts such as “Send a reward to this contact.”



Requesting a reward — the agent gathers any additional details it needs to complete the send.

ion

Search...

Opportunities Leads Tasks Files Accounts **Contacts** Campaigns Dashboards Reports Chatter Groups Calendar People More

Account Name: John Doe Phone (2): Email: john.doe@yopmail.com Contact Owner: naseeb rahman

Amount	Created By	Sent via	Delivery Method	Delivery Status	Reward Status
10.00	naseeb rahman	Salesforce	Email	Delivered	Active
10.00	naseeb rahman	Salesforce	Email	Delivered	Active
10.00	naseeb rahman	Salesforce	Email	Delivered	Active
1.20	naseeb rahman	Salesforce	Email	Delivered	Active
2.20	naseeb rahman	Salesforce	Email	Delivered	Active
2.10	naseeb rahman	Salesforce	Email	Delivered	Active

Activity

Upcoming & Overdue

Get started

June - 2026

Seed Email You sent a

Seed Email You sent a

Seed Email You sent a

Seed Call You logged

Tango Reward

Hi, I'm Agentforce! I use AI to search trusted sources, and more. Ask me "What else can you do?" to see how I can simplify your workday. How can I help?

Send a reward to this contact.

I found a matching Contact **John Doe** - john.doe@yopmail.com. How much would you like to send as a reward?

\$10

Perfect! So I'm sending a \$10 reward to **John Doe** - john.doe@yopmail.com. Is that correct?

Describe your task or ask a question...

Agentforce is AI and can make mistakes.

Confirming the request — the agent processes and sends the reward.

Sales Home Opportunities Leads Tasks Files Accounts **Contacts** Campaigns Dashboards Reports Chatter Groups Calendar People More

Contact: John Doe Title: Account Name: Seed Account Phone (2): Email: john.doe@yopmail.com Contact Owner: naseeb rahman

Date	Brand	Amount	Created By	Sent via	Delivery Method	Delivery Status	Reward Status
7/23/2026	Reward Link US	10.00	naseeb rahman	Salesforce	Email	Delivered	Active
7/22/2026	Reward Link US	10.00	naseeb rahman	Salesforce	Email	Delivered	Active
7/22/2026	1-800-FLOWERS.CO...	10.00	naseeb rahman	Salesforce	Email	Delivered	Active
7/22/2026	Reward Link US	10.00	naseeb rahman	Salesforce	Email	Delivered	Active
7/22/2026	Reward Link US	1.20	naseeb rahman	Salesforce	Email	Delivered	Active
7/20/2026	Reward Link US	2.10	naseeb rahman	Salesforce	Email	Delivered	Active

Related Details

We found no potential duplicates of this Contact.

Opportunities (0)

Cases (0)

Campaign History (0)

Activity

Upcoming & Overdue

Get started

June - 2026

Seed Email You sent a

Seed Email You sent a

Seed Email You sent a

Seed Call You logged

Tango Reward

Hi, I'm Agentforce! I use AI to search trusted sources, and more. Ask me "What else can you do?" to see how I can simplify your workday. How can I help?

Send a reward to this contact.

I found a matching Contact **John Doe** - john.doe@yopmail.com. How much would you like to send as a reward?

10

Perfect! So I'll send a \$10 reward to **John Doe** - john.doe@yopmail.com. Is that correct?

yes

Reward sent successfully to John Doe at john.doe@yopmail.com for \$10.

Describe your task or ask a question...

Agentforce is AI and can make mistakes.

The sent reward now appears in the Contact's Tango History related list.

Need Help?

If you run into issues during setup, our support team is ready to help.

- Help documentation: help.rewardsgenius.com
- Support email: success@tangocard.com