



SevenInteractions
a division of Relationship Management Services LLC

A Personal Card and Gift Card Sending Application for Salesforce.com

User Guide

April 2015

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A Division of Relationship Management Services LLC



Sending a Personal Card

There are 2 ways to send a personal greeting card to your contacts in Salesforce:

1) Send a card directly from the Contact record.

- Select “New Personal Card” button.
- A new Personal Card Edit page will open.
- You can view all cards which have been created and/or sent in the past for this contact on the Contact tab.

Personal Cards (5) | Open Activities (0) | Activity History (0) | Opportunities (0) | Cases (1) | Notes & Attachments (0) | HTML Email Status (0) | Campaign History (0)

Personal Cards

Action	Personal Card	Sender Name	Account	Occasion Name	Sentiment Name	Mailing Date	Status
Edit Del	PC-09-04-2012-000005	Veronica Davis	Global Media	Thank You	Blank Inside	9/7/2012	Submitted
Edit Del	PC-09-04-2012-000001	Veronica Davis	Global Media	Customer Follow-up	We really do appreciate great customers like you and want to take a minute to thank you for your business.	9/8/2012	Submitted
Edit Del	PC-	Veronica	Global	Thank You	I know your time is valuable. Thanks for giving me a few minutes of it.		

Note: Your administrator may need to add the Personal Card section to the contact tab.

2) Send the card from the Personal Card tab.

- Select “New” button.
- A new Personal Card Edit page will open.
- You can view all cards which have been created and/or sent in the past on the Personal Card tab.

Recent Personal Cards

Personal Card	Sender Name	To	Account	Occasion Name	Sentiment Name	Mailing Date	Status
PC-09-04-2012-000010	Veronica Davis	Jon Amos	Global Media	Thank You	I know your time is valuable. Thanks for giving me a few minutes of it.	9/5/2012	Sent
PC-09-04-2012-000009	Veronica Davis	Jon Amos	Global Media	Thank You	I know your time is valuable. Thanks for giving me a few minutes of it.	9/5/2012	Sent
PC-09-04-2012-000008	Veronica Davis	Jon Amos	Global Media	Thank You	I know your time is valuable. Thanks for giving me a few minutes of it.	9/5/2012	Sent
PC-09-04-2012-000007	Veronica Davis	Jon Amos	Global Media	Thank You	I know your time is valuable. Thanks for giving me a few minutes of it.	9/5/2012	Sent
PC-09-04-2012-000006	Veronica Davis	Jon Amos	Global Media	Thank You	I know your time is valuable. Thanks for giving me a few minutes of it.	9/5/2012	Sent
PC-09-04-2012-000013	Veronica Davis	Jon Amos	Global Media	Thank You	Blank Inside	9/5/2012	Created
PC-09-04-2012-000012	Veronica Davis	Jon Amos	Global Media	Thank You	Blank Inside	9/5/2012	Submitted
PC-09-04-2012-000011	Veronica Davis	Jon Amos	Global Media	Thank You	I know your time is valuable. Thanks for giving me a few minutes of it.	9/5/2012	Created
PC-09-04-2012-000006	Veronica Davis	Jon Amos	Global Media	Thank You	Our sincerest thanks for your business, your loyalty, and your trust in us.	9/7/2012	Submitted
PC-09-04-2012-000005	Veronica Davis	Jon Amos	Global Media	Thank You	Blank Inside	9/7/2012	Submitted

Note: You may need to add the Personal Card tab to your workspace.



Creating and Sending a Personal Card

Creating and sending a personal greeting card is simple. Cards can be sent immediately or at some date in the future.

1) Select the Recipient

- Choose your recipient from the contact list. You can also associate the card with an opportunity, if desired.

2) Design the Card

- Select the “Occasion” from the drop down list.

- Select the card design.

- Select the pre-defined sentiment – which will be printed inside the card, above the closing or choose “Blank Inside” for no sentiment.

- Enter a personalized closing message. An example is:

Dear Jon,
We appreciate your business
and value customers like you!
Warm regards,
Veronica Smith

- You have 5 lines of free form text to add a custom closing message. Cards without a sentiment or are designated “Blank Inside” will have 2 additional lines.

- You can automatically include your company name and phone in the closing by checking the box.



Creating and Sending a Personal Card

3) Address the Card

- The contact's main address is pre-populated. Verify the address and update if necessary.
- The sender's main address is pre-populated. Verify and update if necessary.
- You can update the sender's name if you are sending the card on someone else's behalf.

Note: Custom addresses are saved with the card, but are not saved to the contact record.

Note: International addresses are supported with an additional postage charge of \$1 per card.

The screenshot shows a multi-step form. Step 3, 'Specify Recipient Address', includes a dropdown for 'Recipient Address Preference' (Mailing Address [150 Chestnut Street, Toronto, Ontario L4B 1Y3]), a note about US delivery, a checkbox for 'Include Company Name in recipient's address' (checked), and a text field for 'Recipient Address Company Name' (Global Media). Step 4, 'Specify Sender Address', includes a text field for 'Sender Name' (Veronica Smith) and a dropdown for 'Sender Address Preference' (Mailing Address [2100 N. Main St Suite 400, Seattle, WA 98014]). Step 5, 'Specify Mailing Date', includes a date field for 'Mailing Date' (11/26/2012) and a note about mailing through the United States Postal Service. At the bottom are 'Save' and 'Cancel' buttons.

4) Select a Mailing Date and Save

- You can select to send the card immediately* or you can select a date in the future.
- You can make updates the card until 1 business day before the mailing date.
- Select "Save".
- You must "Submit" the card on the following page in order for the card to be sent. The card will remain in "Created" status and will not be sent until "Submitted."



Creating and Sending a Personal Card

5) Review and Submit the Card

- Review the information in the card before submitting.
- Select “Edit” if any changes are required.
- Once the information is final, press “Submit”.
- The status of the card will change from “Created” to “Submitted”. Cards must be in “Submitted” status to be mailed.

Note: You can make updates to cards up to 1 business day before the mailing date.

Clone a Card

- If you are sending multiple cards for the same occasion, you can simply “Clone” an existing card.
- You will need to manually update the recipient/contact information and change any names used in the custom message.

acts Opportunities Personal Card Admin Personal Cards +

Personal Card Detail Edit Delete Clone Submit

Page Help

Information

Personal Card PC - 11-26-2012-000000

Owner Veronica Smith Status Created

Last Modified By Veronica Smith

Step 1: Specify Recipient

To Jon Amos

Account Global Media

Opportunity

Step 2: Design Card

Occasion Name Thank You

Occasion Supports Gift Card ☐

Card Design Name 1HBE1416

Sentiment Name We really do appreciate great customers like you and want to take a minute to thank you for your business.

Card Front

Closing Line 1 Dear Jon,

Closing Line 2 We appreciate your business and value customers like you!

Closing Line 3 Warm Regards,

Closing Line 4 Veronica Smith

Closing Line 5

Include company in closing ☐

acts Opportunities Personal Card Admin Personal Cards +

Personal Card Detail Edit Delete Clone Preview

Page Help

Information

Personal Card PC - 11-26-2012-000000

Owner Veronica Smith Status Submitted

Last Modified By Veronica Smith

Step 1: Specify Recipient

To Jon Amos

Account Global Media

Opportunity

Step 2: Design Card

Occasion Name Thank You

Occasion Supports Gift Card ☐

Card Design Name 1HBE1416

Information

Status Created Owner Veronica Smith

Required Information

Step 1: Specify Recipient

To

Account

Opportunity

Step 2: Design Card

Occasion Thank You

Card Design

Sentiment We really do appreciate great customers like you and want to take a minute to thank you for your business.

Closing Line 1 Dear Jon,

Closing Line 2 We appreciate your business and value customers like you!

Closing Line 3 Warm Regards,

Closing Line 4 Veronica Smith

Closing Line 5

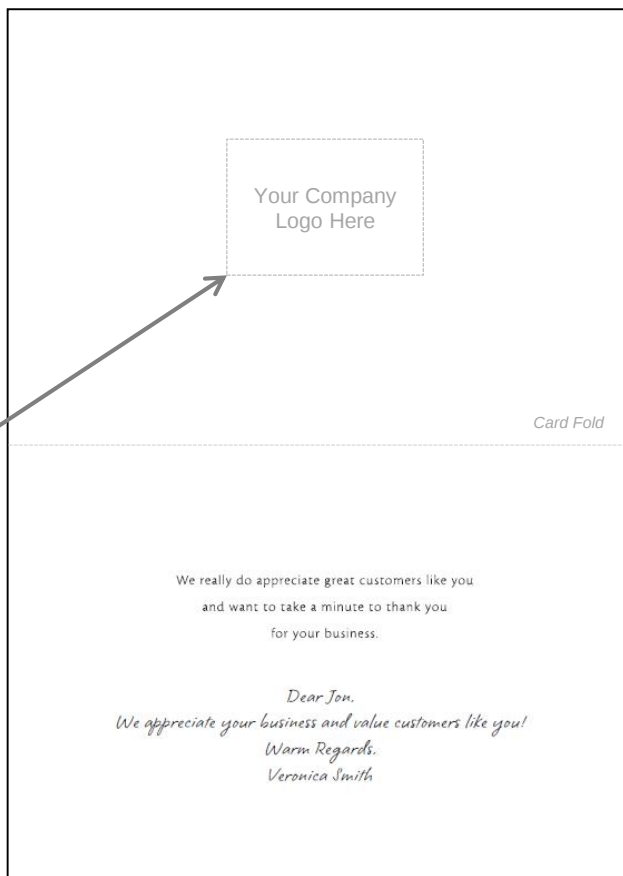


Creating and Sending a Personal Card

Preview or Update the Card

- You can make updates to the card for up to 1 full business day before the mailing date. Simply select “Edit” and make any required updates and “Save”.
- You can also preview the inside of the card at any time. Simply select “Preview”.
- If your company has a included a logo with the Card Sending application, the logo will appear inside the card as shown.

Preview of Inside of Card



- All custom messages will be printed using the custom handwriting style font shown to the right.

John,
Sorry I couldn't be with you on your birthday this year.
I hope you had a great day!
All my best,
Max

Andy,
Thanks for meeting with me last week to confirm your business needs.
Best regards,
Max



Including a Gift Card with the Personal Card

If your administrator has enabled Gift Card sending, you have the capability to include a gift card with your personal card.

Sending a Gift Card

- Gift Cards can only be sent from within a Personal Greeting Card.
- Only certain Occasions support Gift Cards. These are indicated in the Occasion drop down box with an (Gift Card Support) annotation.
- Select the Occasion for which you would like to create a greeting card to include a Gift Card.
- Select an amount for the Gift Card. Amounts must be in multiples of \$5, with a \$10 minimum value and a maximum set by your Salesforce administrator.

The screenshot displays the 'Personal Card Edit' interface. At the top, there are tabs for 'Contacts', 'Opportunities', 'Personal Card Admin', and 'Personal Cards'. The 'Personal Cards' tab is active. Below the tabs, there are 'Save' and 'Cancel' buttons. The interface is divided into several sections: 'Information', 'Step 1: Specify Recipient', 'Step 2: Design Card', 'Step 3: Specify Recipient Address', and 'Step 4: Specify Sender Address'. In the 'Step 2: Design Card' section, the 'Occasion' dropdown menu is open, showing a list of occasions. An arrow points from the text 'These are indicated in the Occasion drop down box with an (Gift Card Support) annotation.' to the 'Gift Card Support' text next to the 'Welcome (Gift Card Support)' option. In the 'Step 3: Specify Recipient Address' section, there is a 'New! Add a Gift Card.' section. An arrow points from the text 'Select an amount for the Gift Card. Amounts must be in multiples of \$5, with a \$10 minimum value and a maximum set by your Salesforce administrator.' to the 'Gift Card Amount' input field, which has the value '25' entered. The 'New! Add a Gift Card.' section includes a checkbox for 'Include a gift card in the chosen amount.' which is checked, and a note about the maximum dollar amount of \$125.

Note: If the “Send a Gift Card” section does not appear when you create the greeting card, your administrator will need to add “Enable Gift Card” privileges to your user profile.



Including a Gift Card with the Personal Card

Review and Submit the Greeting Card with the Gift Card

- Review the final Greeting Card with the Gift Card amount.
- Select “Edit” if any changes are required.
- Once the information is final, press “Submit”.
- The status of the card will change from “Created” to “Submitted”. Cards must be in “Submitted” status to be mailed.

The screenshot shows the 'Personal Card Detail' form in Salesforce. The form is divided into three main sections: 'Information', 'Step 1: Specify Recipient', and 'Step 2: Design Card'. The 'Information' section includes fields for 'Personal Card' (PC - 11-27-2012-000000), 'Owner' (Randy Davis), 'Last Modified By' (Randy Davis), 'Status', and 'Created'. The 'Step 1: Specify Recipient' section includes fields for 'To' (Jon Amos), 'Account' (Global Media), and 'Opportunity'. The 'Step 2: Design Card' section includes fields for 'Occasion Name' (Thank You), 'Occasion Supports Gift Card' (checked), 'Card Design Name' (1HBE1404), 'Sentiment Name' (With sincere gratitude for your very kind referral.), 'Card Front' (a small image of a card), 'Closing Line 1' (Dear Jon,), 'Closing Line 2' (A token of our appreciation for your support of us.), 'Closing Line 3' (Warmest regards,), 'Closing Line 4' (Randy), 'Closing Line 5' (), 'Include company in closing' (unchecked), 'Yes, include a gift card.' (checked), and 'Gift Card Amount' (\$25). The 'Submit' button is highlighted with a red arrow.

Note: You can make updates to cards up to 1 business day before the mailing date.

About Gift Cards

- Gift cards are printed directly inside the card (where the logo would normally be placed.)
- Gift cards are redeemable at the recipients choice of over 350 merchants.
- The recipient simply visits <http://www.hallmarkbusiness.com/cards> and enters the gift card code printed on the card to select the gift card(s) of their choice.
- Gift Cards amounts can be sent in multiples of \$5.
- Your administrator has set the maximum limit for the amount of the Gift Cards.
- **Gift cards can only be sent to US postal addresses at this time.**