



SevenInteractions
a division of Relationship Management Services LLC

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

Installation Guide
For **Enterprise, Unlimited & Professional**
Editions

Last updated: December 2014

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Note: This guide is intended for Salesforce Administrators. If you are not a Salesforce Administrator, please contact your company's current administrator(s) and ask them to follow these instructions or change your profile to a "System Administrator."

Before You Begin

Requirements

This guide applies to the following supported editions of Salesforce:

- ✓ Enterprise
- ✓ Unlimited
- ✓ Professional

We support the same browser and operating systems that Salesforce.com supports. We recommend installing with Firefox running on a Windows or Mac-based OS.

If you have any issues or questions with setup, please contact us at support@seveninteractions.com.

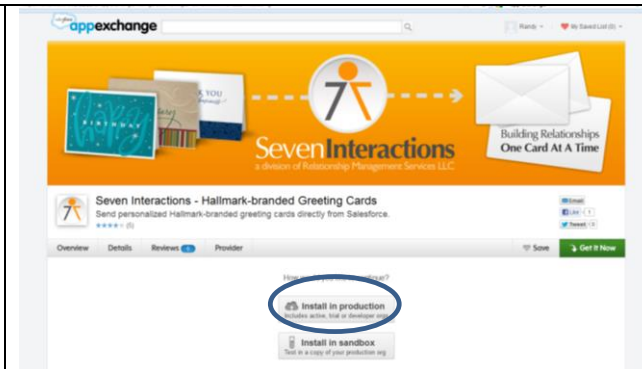
Install Seven Interactions for Salesforce.com

1. Install the Package Using the Installation Link

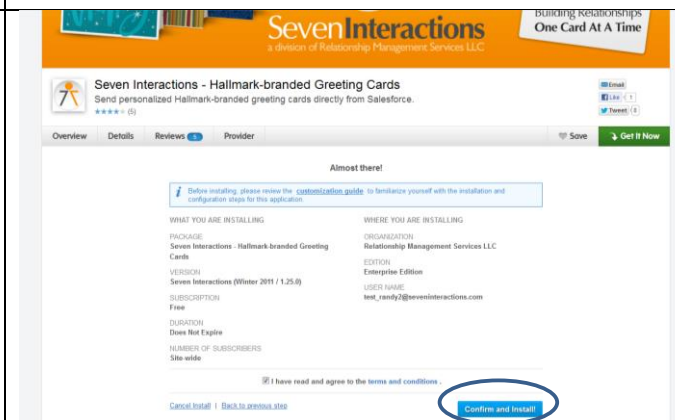
You must be a Salesforce Administrator to install the Seven Interactions Personal Card package. You may have received an email from support@seveninteractions.com with the installation link or you may search the AppExchange for Seven Interactions.

A. Install the most recent Seven Interactions package in your Salesforce environment.

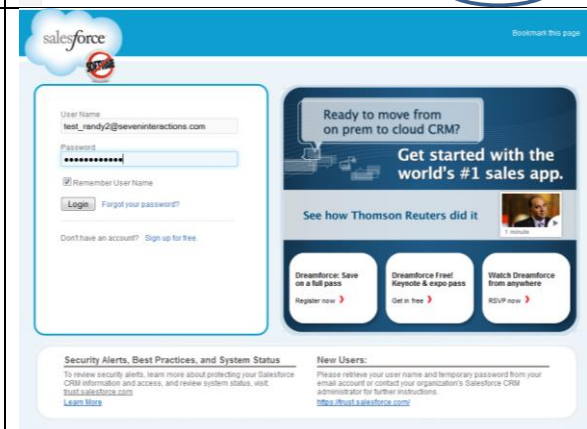
Search for Seven Interactions, Greeting Cards, Hallmark Cards, Premium Cards or Gift Cards on the AppExchange.



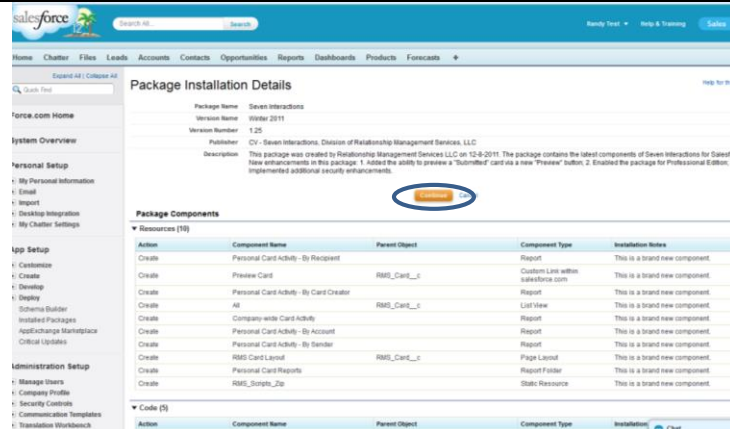
B. Click 'Confirm and Install' to continue.



C. Sign into your Salesforce Account, if prompted to do so.

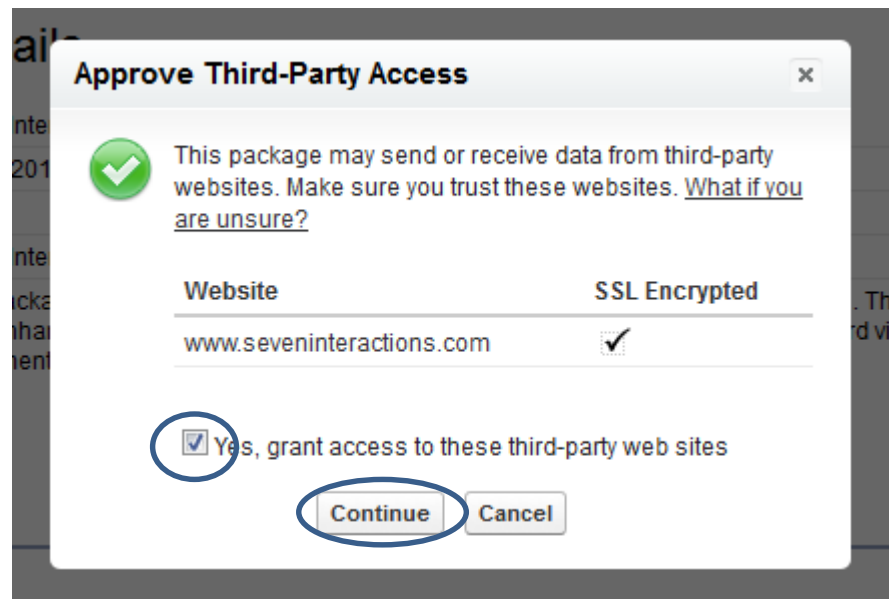


D. Press 'Continue' to proceed with the installation.



E. Provide approval for Seven Interactions to send and receive data for purposes of sending cards, updating card statuses and providing email notifications. Seven Interactions uses secure SSL for all data transfer.

Check the 'Yes' box and press 'Continue' button.



F. Approve Package API access.

Press the 'Next' button.

Package Installer
Seven Interactions Help for this Page

Step 1. Approve Package API Access Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Social Posts	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Ideas	✓	✓	✓	✓					

General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next Cancel

G. Choose security level
(Enterprise and Unlimited Edition ONLY – Professional users will not have this option.)

Select 'Select security settings'. The instructions assume you select 'Grant Access to All Users'.

Alternatively, you can select a profile group to whom you can give privileges to use the Seven Interactions product. Simply select the 'User access set by profile' button and select the group to provide 'Full Access'.

Package Installer
Seven Interactions Help for this Page

Step 2. Choose security level Step 2 of 3

Select security settings:

☐ Grant access to admins only Users with your profile get full access (best for limited deployments)

☒ Grant access to all users All internal custom profiles get full access

☐ Select security settings User access set by profile (recommended for most packages)

Previous Next Cancel

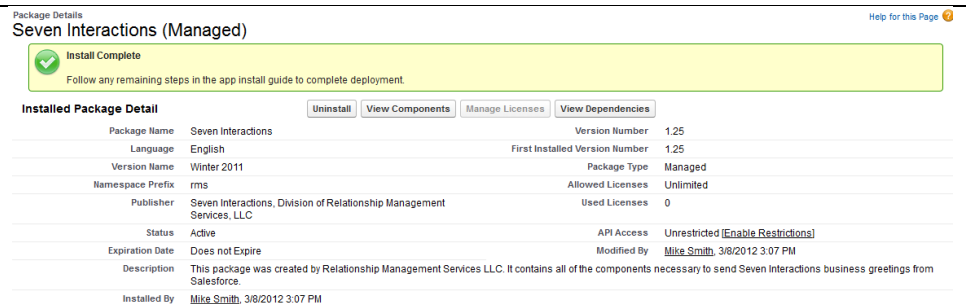
H. Install the Package.

Once the 'Install' button is pressed, the installation process will take approximately 15 to 30 seconds.



I. Success! The Personal Card Package is now deployed in your Salesforce environment.

You must follow the remaining steps, including running the Installation Wizard, in order to begin using the Seven Interactions card sending service.



2. Add the Personal Card Admin and Personal Card Tabs

The package installation created two tabs – Personal Card and Personal Card Admin. It is recommended, but not mandatory, that you add these tabs to your workspace prior to using the service.

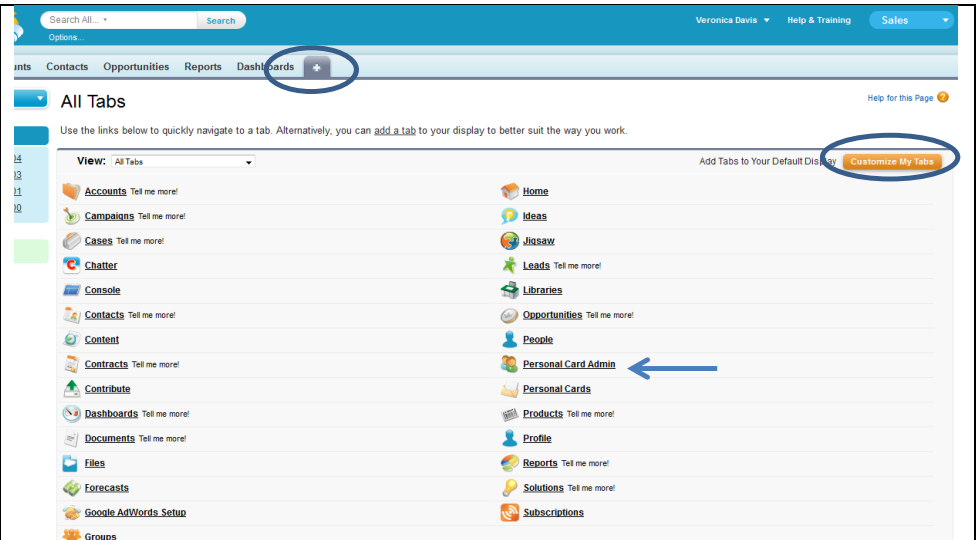
A. Click on the '+' at the top tab to open the 'All Tabs' view.

Next, click on the 'Customize My Tabs' button.

Notice that upon installation of the Seven Interactions application, two tabs are added to the 'All Tabs' view – Personal Card Admin and Personal Card.

Note: Only Personal Card Admins will be able to access the Personal Card Admin tab (see User Guide for more information on selecting Personal Card Administrators). By default, all Salesforce Administrators are Personal Card Admins.

Do not use the Personal Card Admin – Legacy tab. It is no longer valid and is used for support of older package installations.

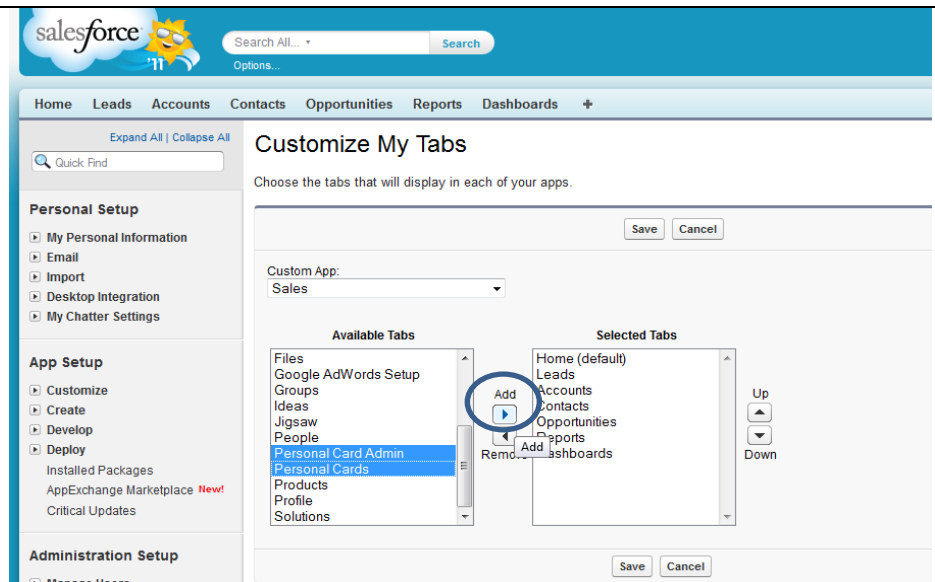


B. Select the 'Personal Card Admin' and 'Personal Cards' tabs from the Available Tabs list.

Press the 'Add' arrow button and use the 'Up' or 'Down' buttons to position the newly added tabs in the correct location. Press the 'Save' button.

You should now see both the Personal Card Admin and Personal Card tabs at the top navigation.

Note: Non-admin users will need to be instructed to add the Personal Cards tab to their top navigation.

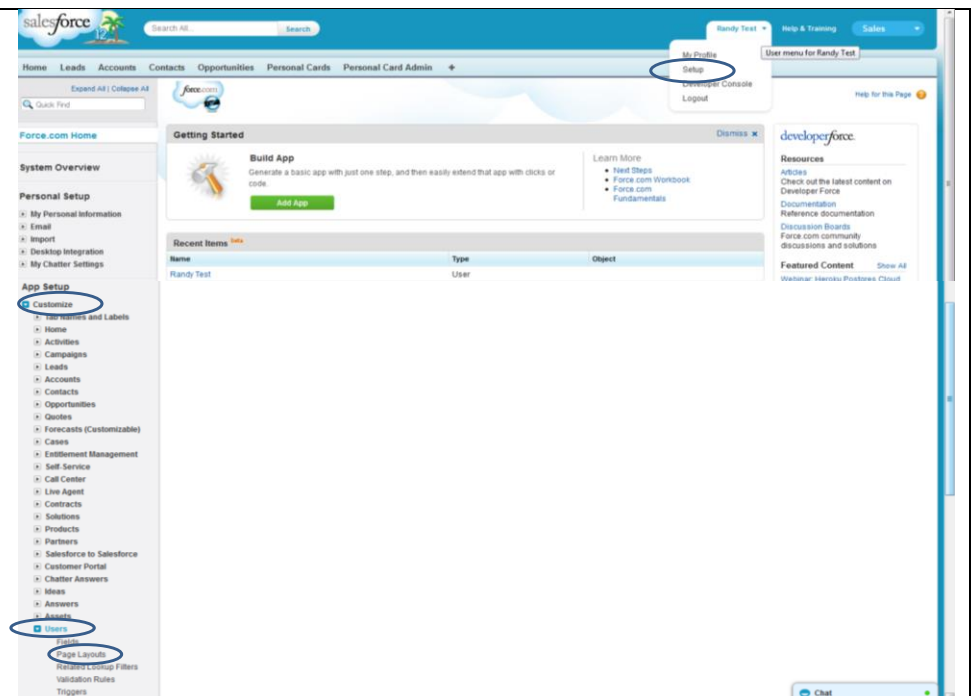


Steps C – E are for Professional Edition ONLY

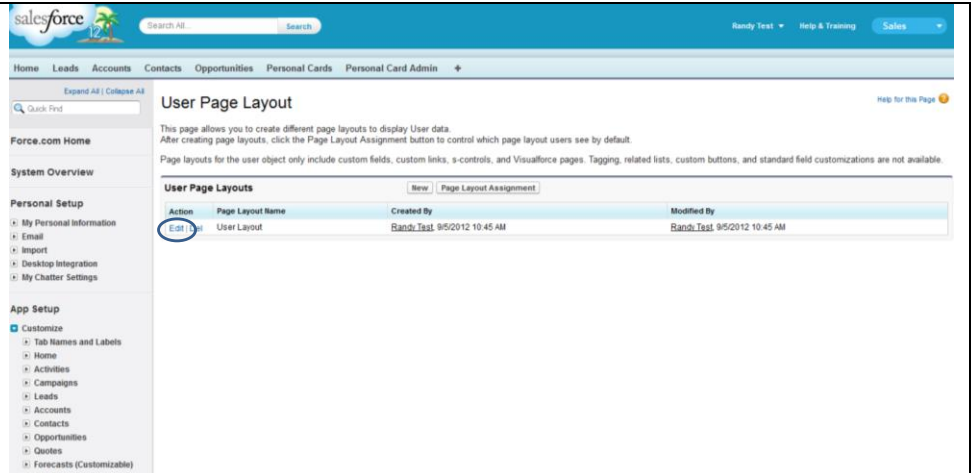
C. You must now add the "RMS Domain" custom field to the User page layout.

Navigate to Setup, then to Customize, then to Users, then to Page Layouts.

Professional Edition ONLY



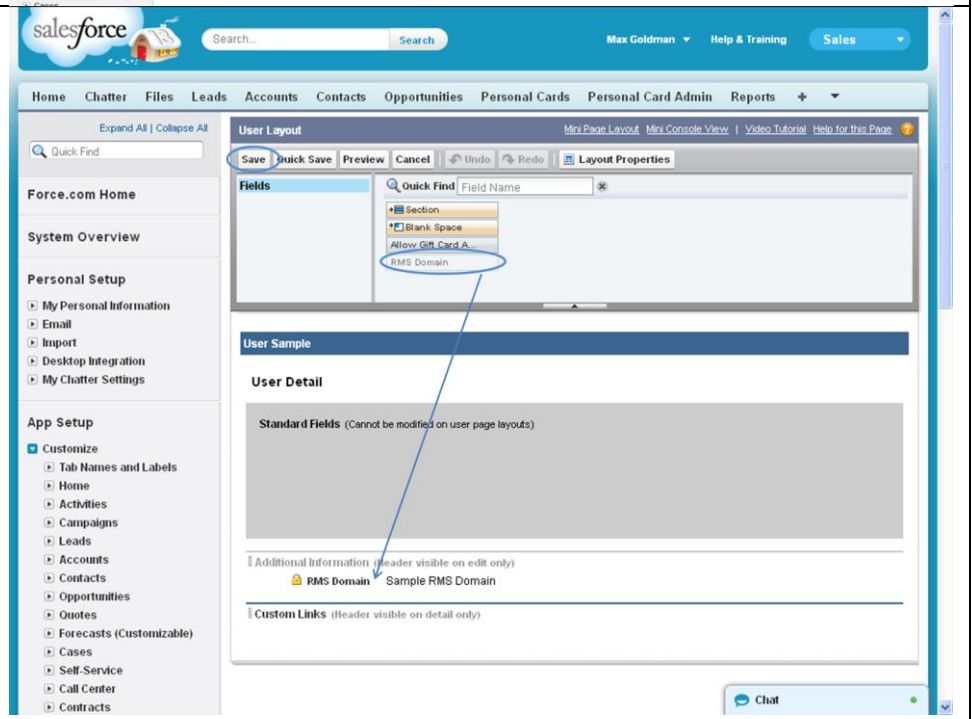
D. Select 'Edit' next to User Layout.



The screenshot shows the Salesforce 'User Page Layout' page. On the left is a navigation sidebar with sections like 'Force.com Home', 'System Overview', 'Personal Setup', and 'App Setup'. The 'App Setup' section is expanded, showing 'Customize' with sub-items like 'Tab Names and Labels', 'Home', 'Activities', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Quotes', and 'Forecasts (Customizable)'. The main content area is titled 'User Page Layout' and contains a table of 'User Page Layouts'. The table has columns for 'Action', 'Page Layout Name', 'Created By', and 'Modified By'. One row is visible with 'User Layout' as the name. The 'Edit' link in the 'Action' column for this row is circled in blue.

Professional Edition ONLY

E. Drag the 'RMS Domain' field onto the User Layout page. Click the 'Save' button.



The screenshot shows the Salesforce 'User Layout' page. The 'Fields' list on the left contains several items, including 'RMS Domain'. A blue arrow indicates that the 'RMS Domain' field is being dragged from the list to the layout area. The 'Save' button in the top left of the layout area is highlighted. The layout area shows a 'User Sample' section with 'User Detail' and 'Standard Fields' (which cannot be modified on user page layouts). Below this, there is a section for 'Additional Information' (header visible on edit only) and 'Custom Links' (header visible on detail only).

Professional Edition ONLY

3. Run the Installation Wizard to Configure Administration Settings

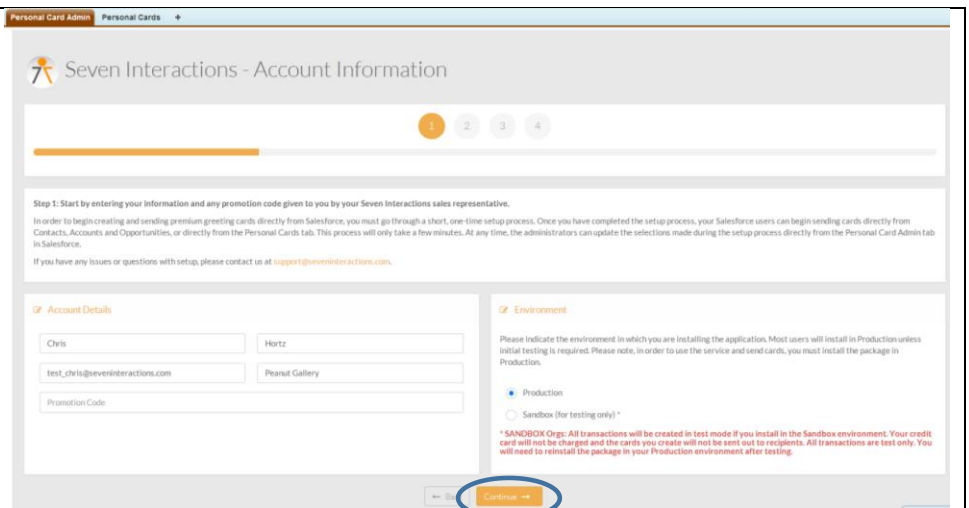
In order to begin creating and sending premium Greeting Cards directly from Salesforce, you must go through a short, one-time setup process. Once you have completed the setup process, your Salesforce users can begin sending Greeting Cards directly from Contacts, Accounts and Opportunities, or directly from the Personal Cards tab. This process will only take a few minutes. At any time, the administrators can update the selections made during the setup process directly from the Personal Card Admin tab in Salesforce.

A. First, click on the 'Personal Card Admin' tab on the top navigation. This will automatically launch the installation wizard for the first-time use of the Seven Interactions application.

Select the target installation environment (usually this will be Production) and complete the contact information (The basics). All fields are required.

Enter a promotion code, if you have been provided one.

Press the 'Continue' button.



Personal Card Admin | Personal Cards

Seven Interactions - Account Information

1 2 3 4

Step 1: Start by entering your information and any promotion code given to you by your Seven Interactions sales representative.

In order to begin creating and sending premium greeting cards directly from Salesforce, you must go through a short, one-time setup process. Once you have completed the setup process, your Salesforce users can begin sending cards directly from Contacts, Accounts and Opportunities, or directly from the Personal Cards tab. This process will only take a few minutes. At any time, the administrators can update the selections made during the setup process directly from the Personal Card Admin tab in Salesforce.

If you have any issues or questions with setup, please contact us at support@seveninteractions.com.

Account Details

Name: Chris | Email: test_chris@seveninteractions.com | Phone: Hertz | Promotion Code: Peanut Gallery

Environment

Please indicate the environment in which you are installing the application. Most users will install in Production unless initial testing is required. Please note, in order to use the service and send cards, you must install the package in Production.

☒ Production
☐ Sandbox (for testing only) *

* **SANDBOX Orgs:** All transactions will be created in test mode if you install in the Sandbox environment. Your credit card will not be charged and the cards you create will not be sent out to recipients. All transactions are test only. You will need to reinstall the package in your Production environment after testing.

[Back](#) [Continue](#)

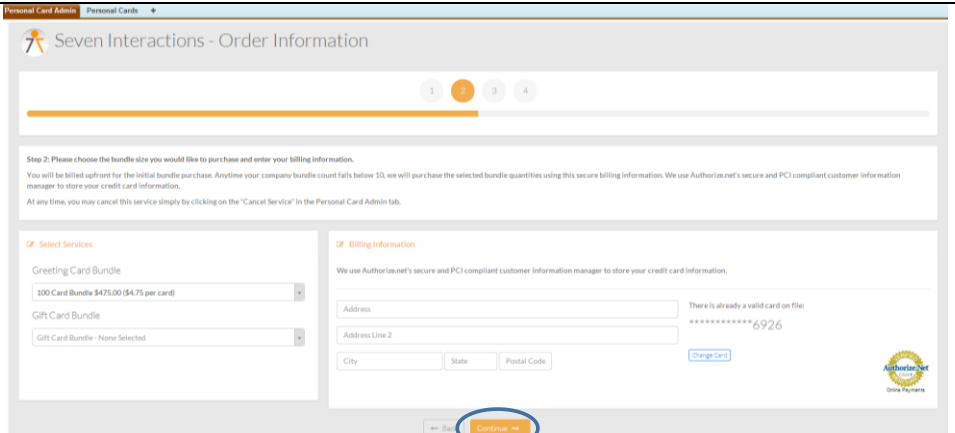
B. Select the bundle choices for Greeting Cards (required) and Gift Cards (optional) for automatic reload and enter the billing information for recurring billing.

Press the 'Continue' button.

When your Greeting Card balance falls below 10 cards and your Gift Card balance falls below \$50, your account will be reloaded based on your bundle selection. **You may change this selection in the Personal Card Admin tab at any time.**

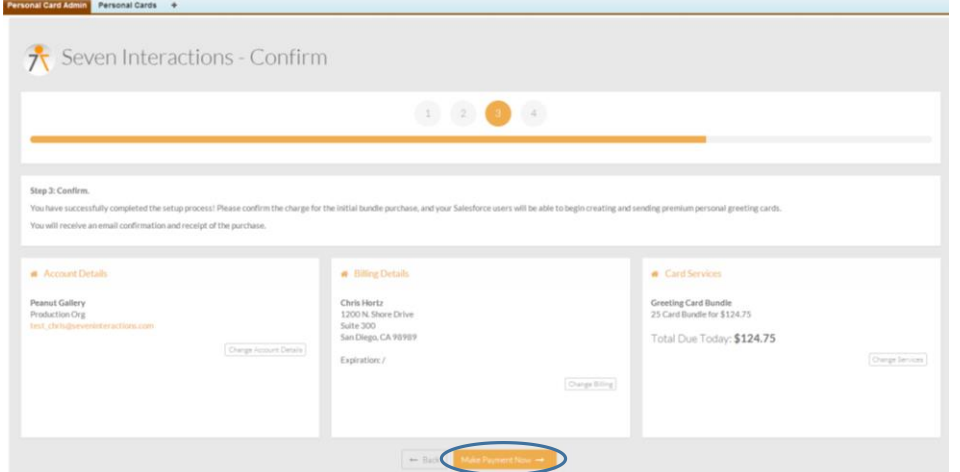
*Note: We use **Authorize.net's** secure, PCI compliant Customer Information Manager for secure storing of credit card and billing information.*

Please note: A 12% processing fee applies to all Gift Card transactions. The processing fee will be added to the purchase at the time the card is charged.



C. Authorize payment for the initial bundle purchase by pressing the 'Make Payment' button.

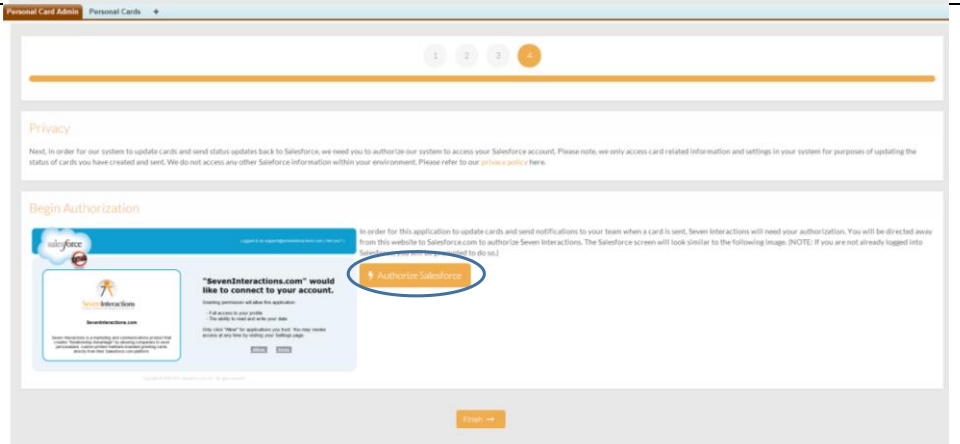
You will receive an email receipt of the purchase to the billing email address you provided in an earlier step.



D. Important: You must authorize access to your Salesforce environment. This allows Seven Interactions to update card statuses once they have been processed and sent, as well as send confirmation emails when cards are sent or your company's Seven Interactions status has changed.

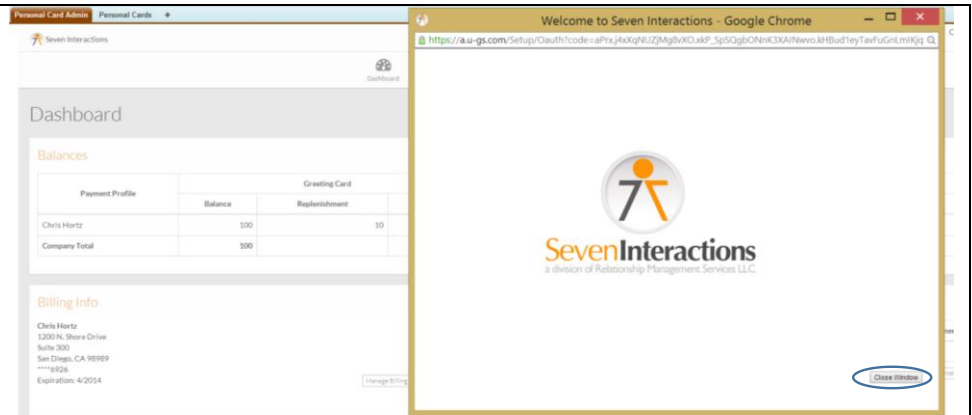
Press the 'Authorize Salesforce' button and log in, if prompted to do so.

Note: We only access your information for purposes associated with using the Personal Card application.



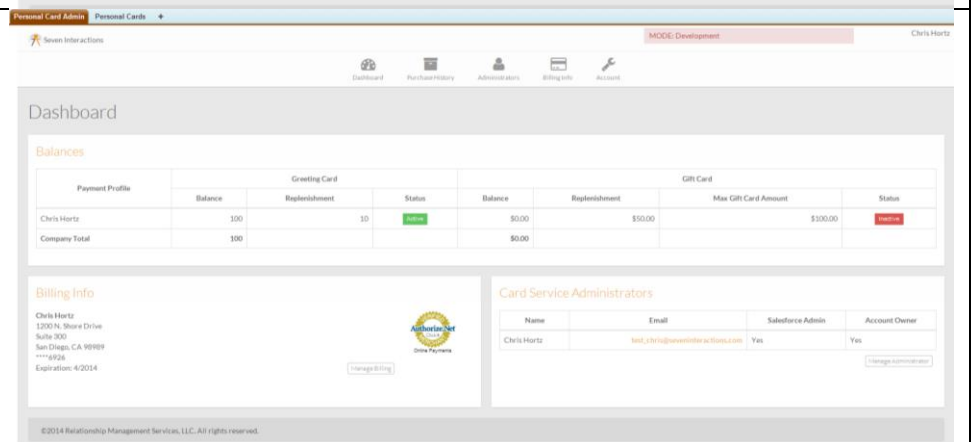
E. Close the Authorization window and installation and authorization is complete!

Your Salesforce users can start sending Greeting Cards directly from their Salesforce environments immediately! Just tell them to add the Personal Card tab to their environment.



F. You can change any of your settings (billing information, bundle selection, administrators) through the Personal Card Admin tab.

You can also enable the ability to send Gift Cards with your personal cards. [See Gift Card Enablement instructions \(Section 5\)](#) to learn how to enable your workforce to send Gift Cards inside one of our premium Greeting Cards.



4. Add Permissions to Customized Profile or Create a New Profile (Optional) – Enterprise and Unlimited Editions ONLY

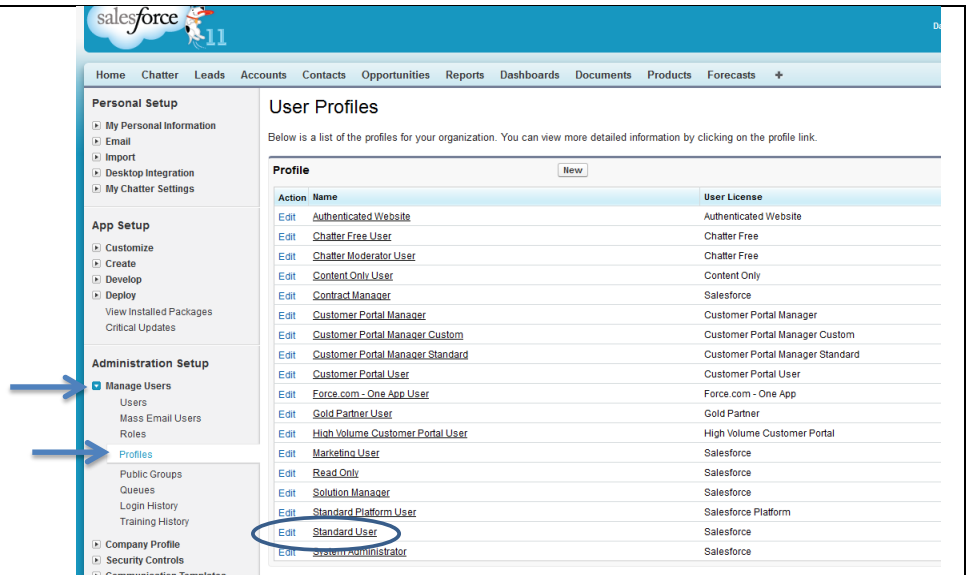
You only need to do this step if you prefer to restrict access to the Seven Interactions personal card service to a certain profile group or if you do not already have a custom profile set up for your users.

If you prefer to restrict access to the Seven Interactions personal card service, you must either create a new custom Profile **or** update any custom profiles you have already created to provide custom object permission to the Personal Card service. Anyone who will be using the Personal Card service must belong to the Personal Card profile **or** their current, customized profile must be given access to the Personal Card object.

A. First, expand 'Manage Users' and click on 'Profiles'.

Next, determine which custom profile(s) should have access to use the Seven Interactions service. For each profile that you wish to access the service, you must follow the remaining steps.

Select the profile you want to edit and click the profile name.

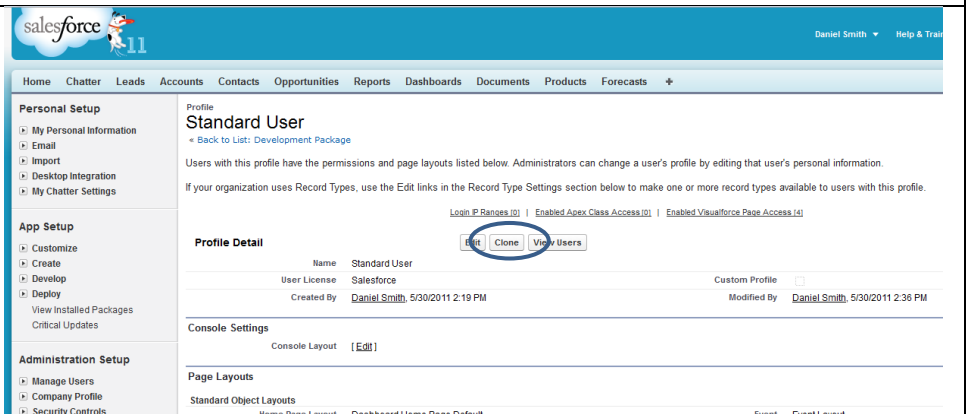


Action	Name	User License
Edit	Authenticated Website	Authenticated Website
Edit	Chatter Free User	Chatter Free
Edit	Chatter Moderator User	Chatter Free
Edit	Content Only User	Content Only
Edit	Contract Manager	Salesforce
Edit	Customer Portal Manager	Customer Portal Manager
Edit	Customer Portal Manager Custom	Customer Portal Manager Custom
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard
Edit	Customer Portal User	Customer Portal User
Edit	Force.com - One App User	Force.com - One App
Edit	Gold Partner User	Gold Partner
Edit	High Volume Customer Portal User	High Volume Customer Portal
Edit	Marketing User	Salesforce
Edit	Read Only	Salesforce
Edit	Solution Manager	Salesforce
Edit	Standard Platform User	Salesforce Platform
Edit	Standard User	Salesforce
Edit	System Administrator	Salesforce

Follow the next set of instructions (B – C) if you do NOT have an existing custom profile, and you need to create a new Personal Card Profile. Otherwise, skip to the next section titled 'Assigning Custom Object Permissions to Custom Profiles'.

B. If you do not currently use custom profiles, select the 'Standard User' profile and click on the profile name. Clone the selected profile to create a new custom profile.

Press the 'Clone' button.



Standard User
← Back to List: Development Package

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (4)

Profile Detail

Name	Standard User
User License	Salesforce
Created By	Daniel Smith: 5/30/2011 2:19 PM
Modified By	Daniel Smith: 5/30/2011 2:36 PM

Console Settings

Console Layout: [Edit]

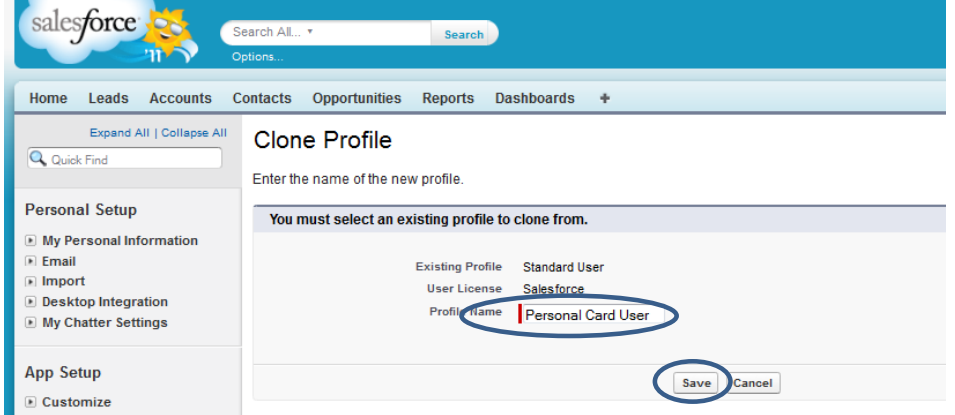
Page Layouts

Standard Object Layouts

Home Page Layout | Dashboard Home Page Default | Email | Email Layout

C. Name the cloned profile 'Personal Card User' and press the 'Save' button.

This will be the profile that you must assign all users to who will have access to the Seven Interactions personal card sending service.

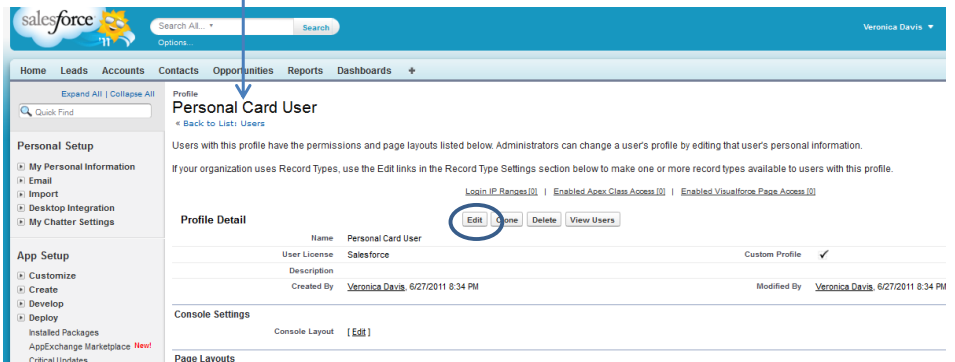


The screenshot shows the 'Clone Profile' page in Salesforce. The 'Existing Profile' is 'Standard User', the 'User License' is 'Salesforce', and the 'Profile Name' is 'Personal Card User'. The 'Save' button is circled in blue.

Assign Custom Object Permissions to Custom Profiles, either existing custom profiles or the new Personal Card User profile.

D. Select the newly created profile to add permission to use the Seven Interactions service. Please note, you cannot add permissions to the existing Standard User profile.

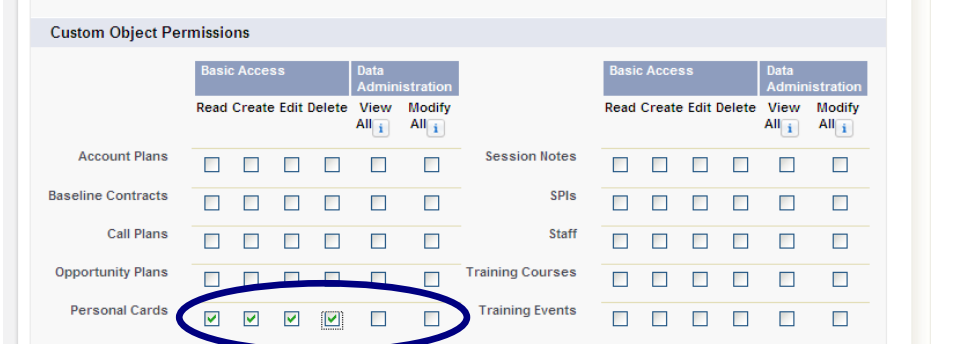
Press the 'Edit' button.



The screenshot shows the 'Profile Detail' page for the 'Personal Card User' profile. The 'Edit' button is circled in blue.

E. Scroll down the page to the Custom Object Permissions - Personal Cards. Place checks in the first four (4) boxes for Personal Cards Object Permissions.

Press the 'Save' button.



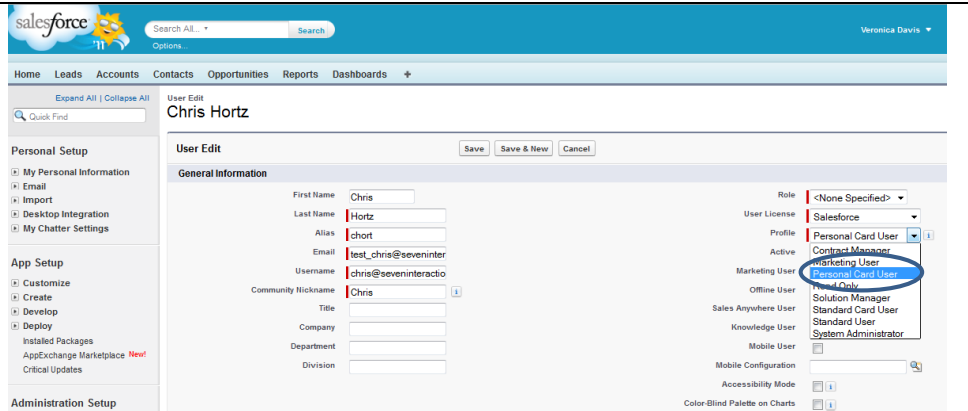
The screenshot shows the 'Custom Object Permissions' page. The 'Personal Cards' row has the first four checkboxes (Read, Create, Edit, Delete) checked, which are circled in blue.

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Account Plans	☐	☐	☐	☐	☐	☐	Session Notes	☐	☐	☐	☐	☐	☐
Baseline Contracts	☐	☐	☐	☐	☐	☐	SPIs	☐	☐	☐	☐	☐	☐
Call Plans	☐	☐	☐	☐	☐	☐	Staff	☐	☐	☐	☐	☐	☐
Opportunity Plans	☐	☐	☐	☐	☐	☐	Training Courses	☐	☐	☐	☐	☐	☐
Personal Cards	☒	☒	☒	☒	☐	☐	Training Events	☐	☐	☐	☐	☐	☐

F. If you created a new profile, open each User record from the Manage Users section and assign each user to the new profile. If you edited an existing profile, you should ensure all users who will be using the Seven Interactions service are assigned to that profile.

Press the 'Save' button once each user is assigned.

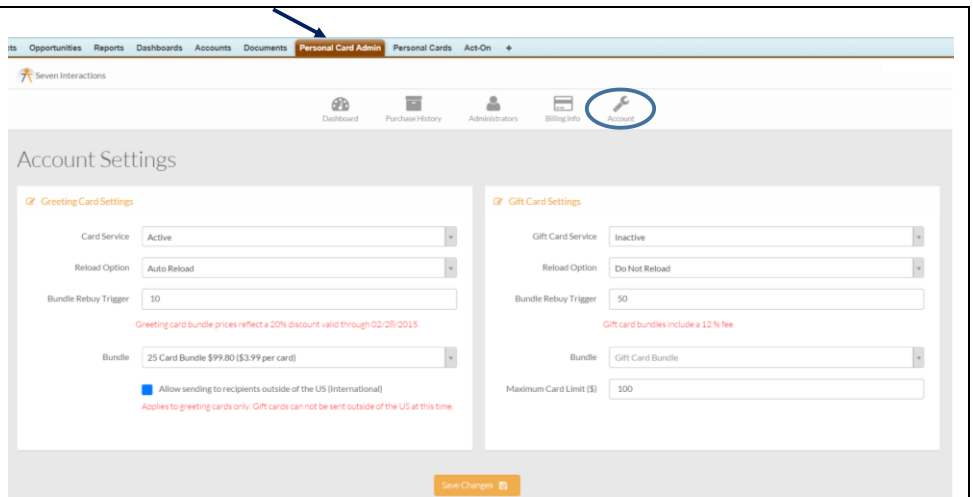
Please note: Salesforce Administrators automatically have permissions to use the custom objects. Therefore, you do not need to add permissions for admins.



5. Sending Cards Internationally - New

Seven Interactions allows you and your salesforce users to send cards outside of the US (internationally) for an additional fee. To send cards internationally, your personal card administrator must first enable international card sending in the Personal Card Admin section.

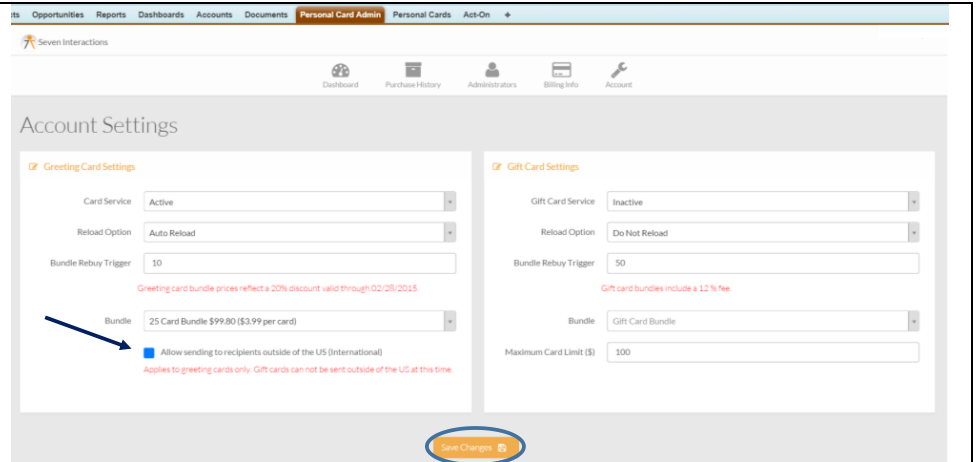
A. Navigate to the Personal Card Admin tab and select the Account setting.



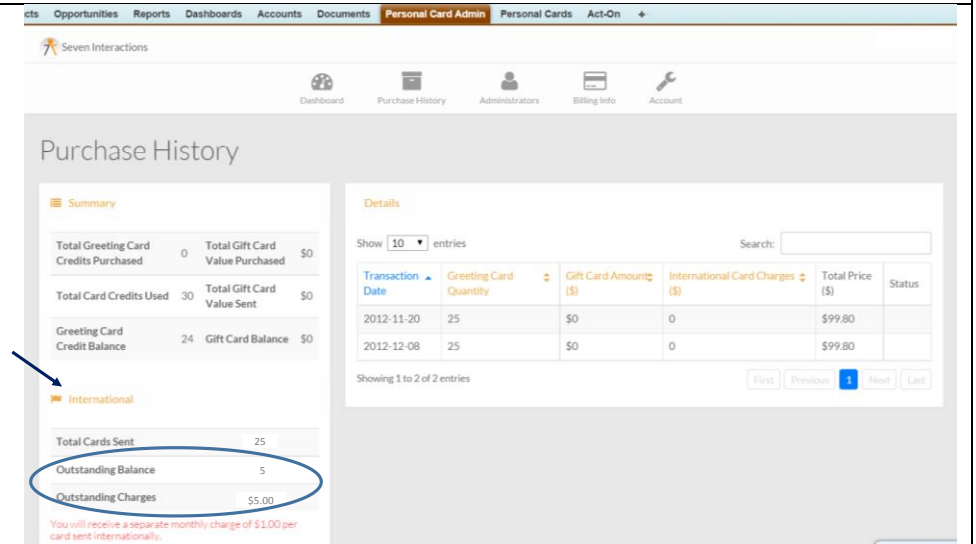
B. Check the “Allow sending to recipients outside of the US (International)” checkbox.

Click “Save Changes”.

This will allow your salesforce users to send cards to non-US addresses.



C. At the beginning of each month, Seven Interactions will charge your credit card on file for the previous month’s international charges. You can see your outstanding international balance in the Purchase History section of the Personal Card Admin tab.



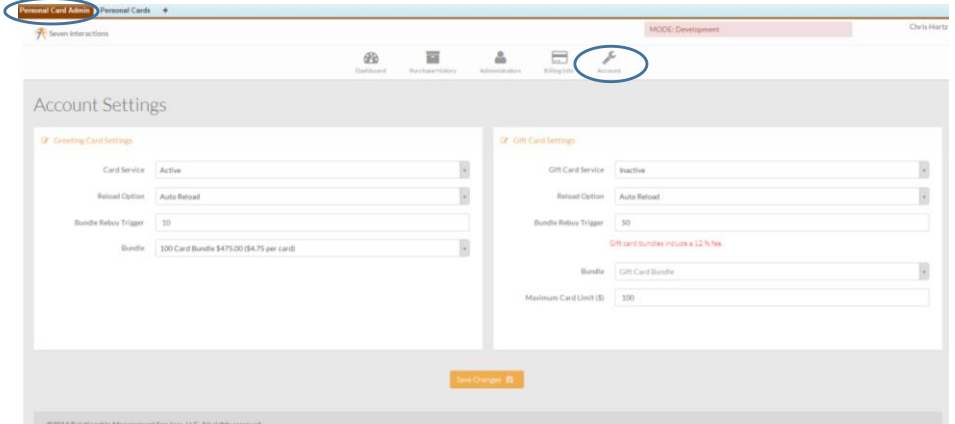
6. Enable Gift Card Sending

Seven Interactions now has the capability to include Gift Cards when you send a Personal Card. What better way to show your customers, clients, employees and other contacts your appreciation than sending them a personal Gift Card which can be redeemed at their choice of over 350 merchants!

A. In order for your workforce to send Gift Cards, you must first purchase a Gift Card balance if you did not do so during initial installation.

Click on the 'Personal Card Admin' tab and click on the 'Account' tab.

Note: If you have already purchased a Gift Card balance during initial setup, please skip steps B – E and go directly to step F to configure your users access to Gift Cards.

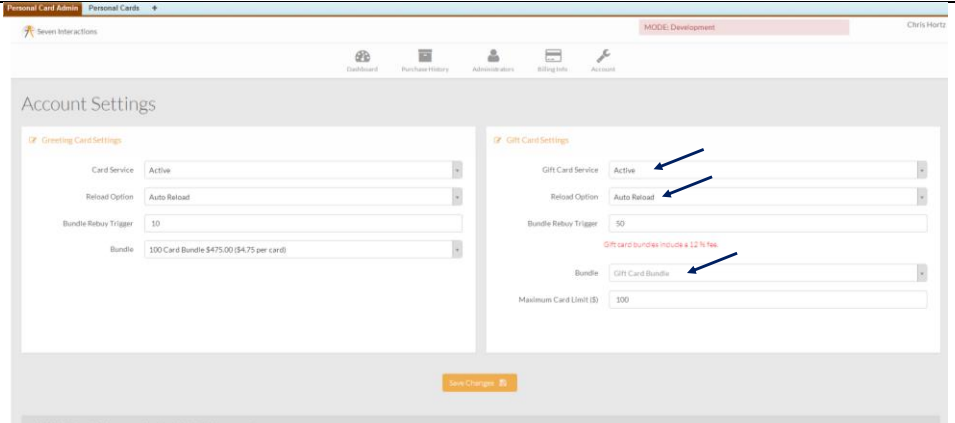


The screenshot shows the 'Personal Card Admin' interface. The 'Account' tab is selected in the top navigation bar. The 'Account Settings' section is visible, with the 'Gift Card Settings' panel on the right. In this panel, the 'Gift Card Service' dropdown is set to 'Inactive'. Other settings like 'Reload Option' (Auto Reload) and 'Bundle Rebuy Trigger' (\$0) are also visible.

B. Set the Gift Card Service to "Active" and select the amount you wish to purchase in Gift Card value. This will create an initial purchase so that your workforce can begin sending Gift Cards inside of Personal Cards. It will also become the replenishment amount. When your Gift Card balance falls below \$50, the system will automatically replenish the Gift Card balance to the selected value.

You can select 'Do Not Reload' if you wish to turn auto-replenishment of Gift Cards off.

You must also set a Maximum Card limit. This limit keeps your workforce from sending a Gift Card in



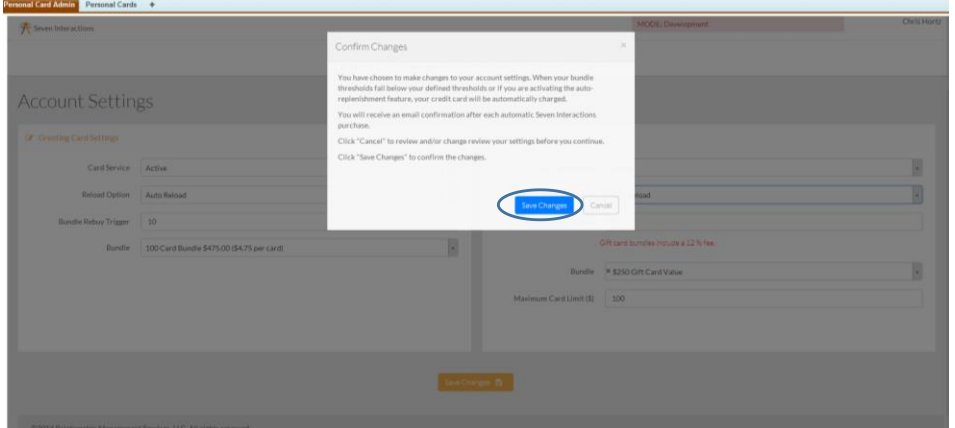
This screenshot shows the same 'Personal Card Admin' interface, but with changes. The 'Gift Card Service' dropdown is now set to 'Active'. The 'Bundle' dropdown is set to 'Gift Card Bundle'. Blue arrows point to these two settings. The 'Maximum Card Limit (\$)' is set to 100. The 'Save Changes' button is visible at the bottom.

an amount greater than the limit.

Select 'Save' once you are finished selecting your Gift Card values.

C. Confirm the charge to your credit card on file and click 'OK'.

Please note: A 12% processing fee applies to all Gift Card transactions. The processing fee will be added to the purchase at the time the card is charged.

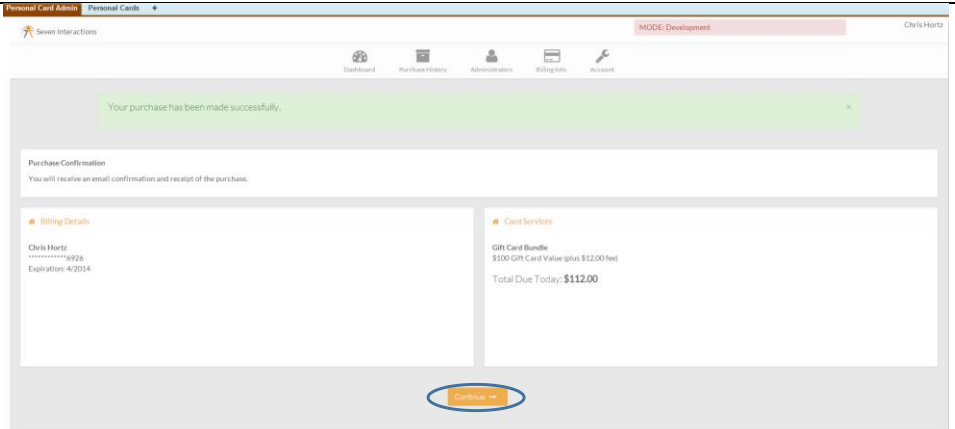


Confirm Changes

You have chosen to make changes to your account settings. When your bundle thresholds fall below your defined thresholds or if you are activating the auto-replenishment feature, your credit card will be automatically charged. You will receive an email confirmation after each automatic Seven Interactions purchase. Click "Cancel" to review and/or change your settings before you continue. Click "Save Changes" to confirm the changes.

Save Changes Cancel

D. You will receive a confirmation of your purchase and setting changes. You will also receive a confirmation of purchase email.



Your purchase has been made successfully.

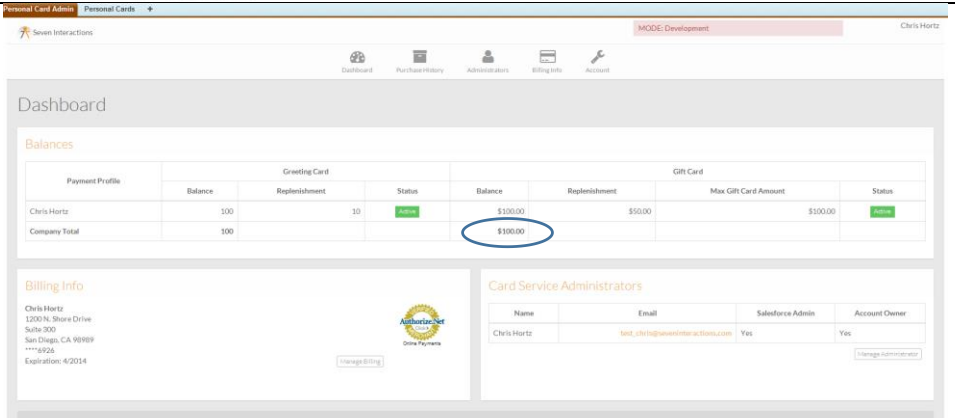
Purchase Confirmation
You will receive an email confirmation and receipt of the purchase.

Billing Details
Chris Hartz
*****926
Expiration: 4/2014

Card Service
Gift Card Bundle
\$100 Gift Card Value (plus \$12.00 fee)
Total Due Today: **\$112.00**

Continue

E. Your Gift Card balance is displayed on the Personal Card Admin Dashboard.



Dashboard

Balances

Payment Profile	Greeting Card			Gift Card			
	Balance	Replenishment	Status	Balance	Replenishment	Max Gift Card Amount	Status
Chris Hartz	100	30	Active	\$100.00	\$50.00	\$500.00	Active
Company Total	100			\$100.00			

Billing Info
Chris Hartz
1200 N. Shore Drive
Suite 300
San Diego, CA 92109
****6926
Expiration: 4/2014

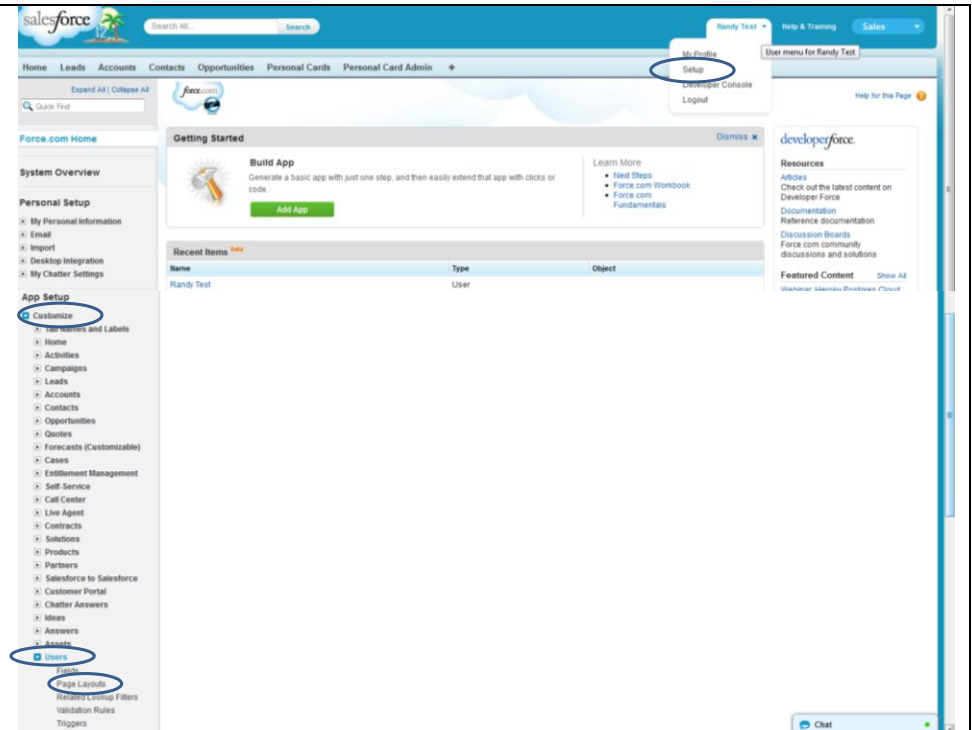
Card Service Administrators

Name	Email	Salesforce Admin	Account Owner
Chris Hartz	chh@seveninteractions.com	Yes	Yes

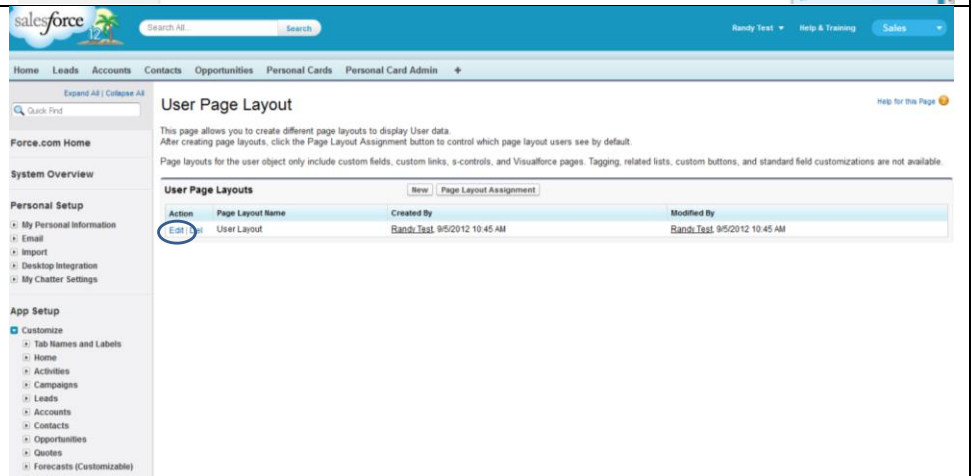
F. You must grant access to the workforces who are allowed to send Gift Cards. Access is granted at the user level only at this time.

Navigate to 'Setup', then to 'Customize', then to 'Users', then to 'Page Layouts'.

You will add an "Enable Gift Cards" checkbox to the User Screen. This will allow you to select which individual users have permission to send Gift Cards.

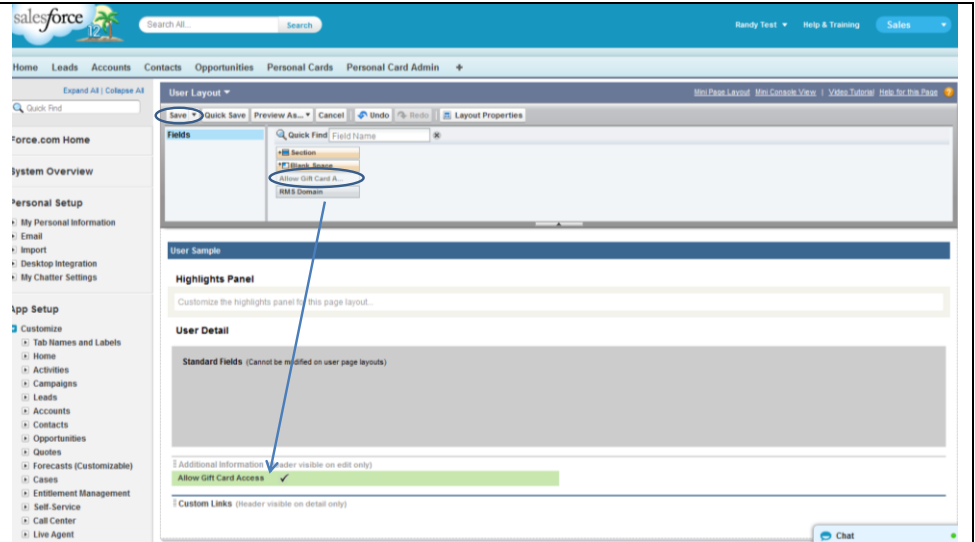


G. Select 'Edit' next to User Layout.



H. Drag the 'Allow Gift Card Access' field onto the User Layout page. Click the 'Save' button.

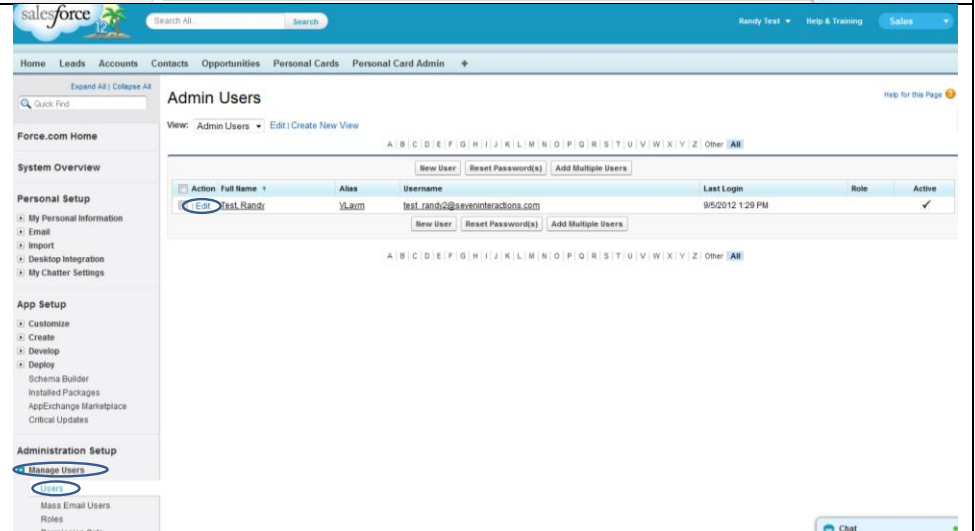
Note: It is recommended to set the properties of this field to Read-Only to prevent individual users from enabling their user profiles without permission. Click on the wrench icon to the right of the field name to set the field properties.



The screenshot shows the Salesforce 'User Layout' editor. In the 'Fields' list on the left, the 'Allow Gift Card Access' field is highlighted with a blue circle. A blue arrow points from this field to the 'User Sample' layout area on the right, indicating it is being dragged into the layout. The layout area shows a 'Highlights Panel' and a 'User Detail' section with 'Standard Fields'.

I. In 'Setup', navigate to 'Manage Users', then to 'Users'.

Click on 'Edit' next to the user who you wish to enable the Gift Card sending capability.



The screenshot shows the Salesforce 'Admin Users' page. In the left sidebar, 'Manage Users' is highlighted with a blue circle. Below it, the 'Users' link is also highlighted with a blue circle. The main content area shows a table of users. The first user, 'Test, Randy', is highlighted with a blue circle, and the 'Edit' button next to their name is also highlighted with a blue circle.

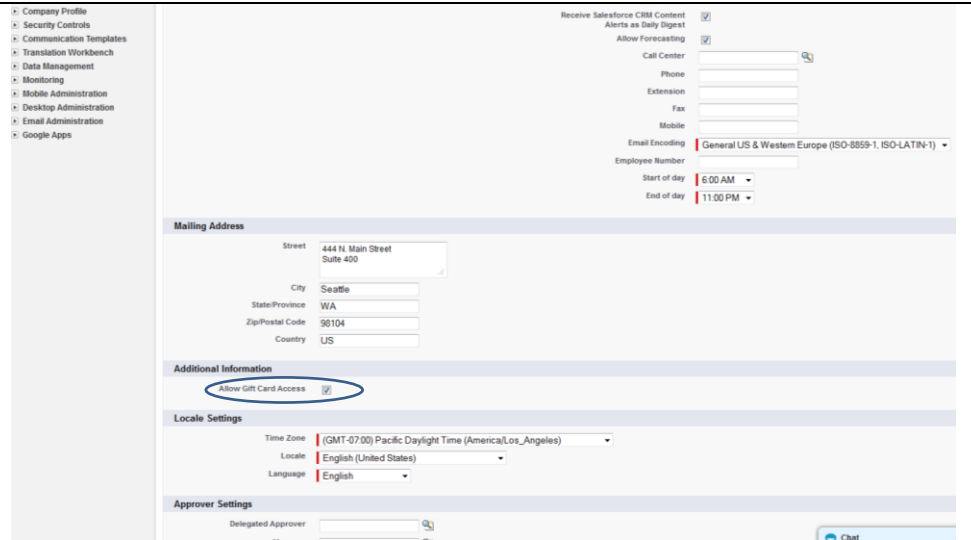
Action	Full Name	Alias	Username	Last Login	Role	Active
Edit	Test, Randy	VLam	test_randy@seveninteractions.com	9/5/2012 1:29 PM		✓

J. On the User Edit screen, scroll down to the 'Additional Information' section and click on the checkbox next to 'Allow Gift Card Access'.

Follow this same step for all users for whom you wish to enable gift card access.

*Please note: all users who have Gift Card enabled **MUST ALSO** be allowed to send Personal Cards. You can only send a Gift Card with a Personal Card.*

If you would like to see a list of users for whom Gift Cards are enabled, simply run the report titled, "Current Gift Card Users" in the Personal Card Reports folder.

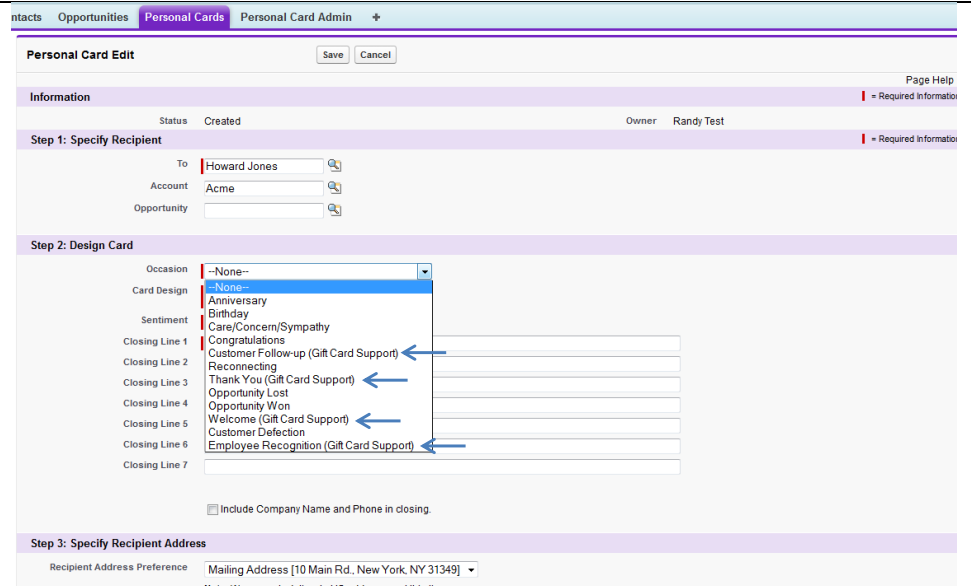


The screenshot shows the 'User Edit' screen in Salesforce. On the left is a navigation menu with options like 'Company Profile', 'Security Controls', 'Communication Templates', etc. The main area is divided into sections: 'Mailing Address' (with fields for Street, City, State/Province, Zip/Postal Code, and Country), 'Additional Information' (where the 'Allow Gift Card Access' checkbox is checked and circled in red), 'Locale Settings' (with dropdowns for Time Zone, Locale, and Language), and 'Approver Settings' (with a 'Delegated Approver' field).

K. Your workforce for whom you have enabled Gift Card access can now send Gift Cards with Greeting Cards.

Only certain Personal Card sending Occasions support the sending of Gift Cards. Gift Card support is noted in the Occasion drop down box.

If you choose an Occasion that does not support Gift Cards, you will not be allowed to enter a Gift Card amount or select the option to send a Gift Card.



The screenshot shows the 'Personal Card Edit' screen in Salesforce. It has a breadcrumb trail: 'Contacts > Opportunities > Personal Cards > Personal Card Admin'. The main section is 'Personal Card Edit' with 'Save' and 'Cancel' buttons. Below this is a table with columns 'Status', 'Created', and 'Owner'. The 'Step 1: Specify Recipient' section shows fields for 'To' (Howard Jones), 'Account' (Acme), and 'Opportunity'. The 'Step 2: Design Card' section has a dropdown for 'Occasion' (set to '-None-') and a list of 'Card Design' options. A dropdown menu is open for 'Occasion', showing options like 'Anniversary', 'Birthday', 'Care/Concern/Sympathy', 'Congratulations', 'Customer Follow-up (Gift Card Support)', 'Reconnecting', 'Thank You (Gift Card Support)', 'Opportunity Lost', 'Opportunity Won', 'Welcome (Gift Card Support)', 'Customer Defection', and 'Employee Recognition (Gift Card Support)'. Arrows point to the 'Thank You (Gift Card Support)', 'Welcome (Gift Card Support)', and 'Employee Recognition (Gift Card Support)' options. The 'Step 3: Specify Recipient Address' section shows a 'Recipient Address Preference' dropdown set to 'Mailing Address [10 Main Rd., New York, NY 31349]'.

L. Once an Occasion is chosen that supports Gift Card sending, you can select to add a Gift Card to the Personal Card.

Select the checkbox next to 'Yes. Include a gift card in the chosen amount.'

Enter an amount for the gift card. Gift cards must be entered in \$5 increments, with a minimum of \$10.

The maximum setting is set by the Administrator in the Personal Card Admin section and cannot exceed \$1,000.

M. Once you have selected 'Save', the Gift Card amount is shown on the Personal Card Detail page.

Changes can be made to this card until the card has been processed or sent (1 full business day prior to the 'Mail Date').

Closing Line 3

Regards,

Closing Line 4

Randy

Closing Line 5

☐ Include Company Name and Phone in closing.

New! Add a Gift Card.

Would you like to include a gift card in your personal card?

The gift card will be in the recipient's name and can be redeemed at a choice of over [350 merchants](#).

☒ Yes. Include a gift card in the chosen amount.

Gift Card Amount

25

Note: Gift card amounts can be entered in increments of \$5 with a minimum of \$10.

The maximum dollar amount of \$25 is set by your Salesforce administrator.

Please contact your administrator if you need additional gift card funds.

Step 3: Specify Recipient Address

Recipient Address Preference

Mailing Address [10 Main Rd., New York, NY 31349] ▼

Note: We can only deliver to US addresses at this time.

☒ Include Company Name in recipient's address.

Recipient Address Company Name

Acme

Step 4: Specify Sender Address

Sender Name

Randy Test

Sender Address Preference

Mailing Address [444 N. Main Street Suite 400, Seattle, WA 98104] ▼

Step 5: Specify Mailing Date

Mailing Date

9/6/2012

Note: Individual greeting cards are mailed through the United States Postal Service using first class postage. Estimated delivery is 5 days after the mail date.

There may be a slight delay in mail date due to holidays or other unforeseen events.

Save

Cancel

Page Help

Information

Personal Card

PC - 09-05-2012-000001

Owner

Randy Test

Status

Created

Last Modified By

Randy Test

Step 1: Specify Recipient

To

Howard Jones

Account

Acme

Opportunity

Step 2: Design Card

Occasion Name

Customer Follow-up

Occasion Supports Gift Card

☒

Card Design Name

1HBE1409

Sentiment Name

With Sincere Appreciation.

Card Front



Closing Line 1

Dear Howard,

Closing Line 2

A small token of our appreciation for your business.

Closing Line 3

Regards,

Closing Line 4

Randy

Closing Line 5

Include company in closing

☐

Yes, Include a gift card.

☒

Gift Card Amount

\$25

Step 3: Specify Recipient Address

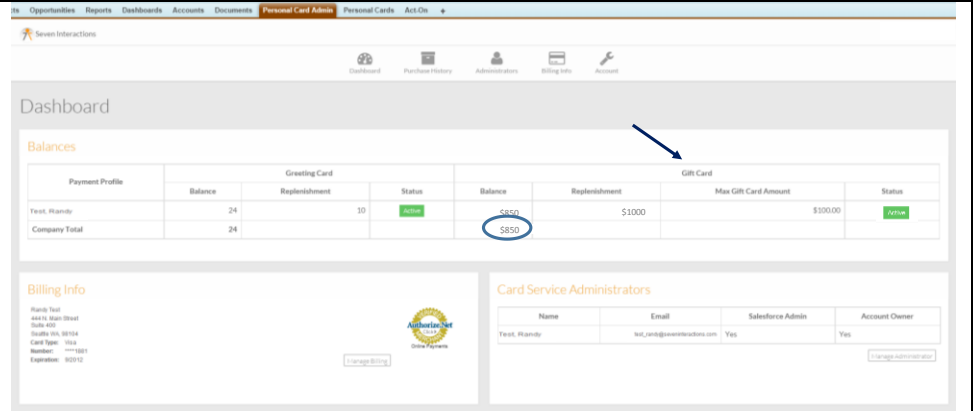
Recipient Address Preference

Mailing

Include Recipient Company Name

☒

N. The Gift Card balance is decremented by the amount of the Gift Card sent. The current balance is always displayed in the Personal Card Admin Dashboard.



Payment Profile	Greeting Card			Gift Card		
	Balance	Replenishment	Status	Balance	Replenishment	Status
Test, Randy	24	10	Active	\$850	\$1000	Active
Company Total	24			\$850		

O. Once the Personal Card and Gift Card have been successfully sent to the Recipient, an email will be sent to the Sender's email address.

Sample Email:

From: **Seven Interactions for Salesforce** <support@seveninteractions.com>
Date: Wed, Sep 5, 2012 at 10:10 AM
Subject: Personal Card With Gift Card Sent Notification
To: Randy Test <randy_test@email.com>

This message is to inform you the personal card you created in Salesforce has been processed and sent to the recipient.

Personal Card: PC - 09-04-2012-000010
Sent to: Howard Jones
Sent on: 09/05/2012

Gift Card Included in the amount of \$25.00

If you have any questions, please contact us at support@seveninteractions.com.

We appreciate your business and look forward to continuing to help you build stronger relationships with your clients.

Regards,
Seven Interactions Customer Management Team

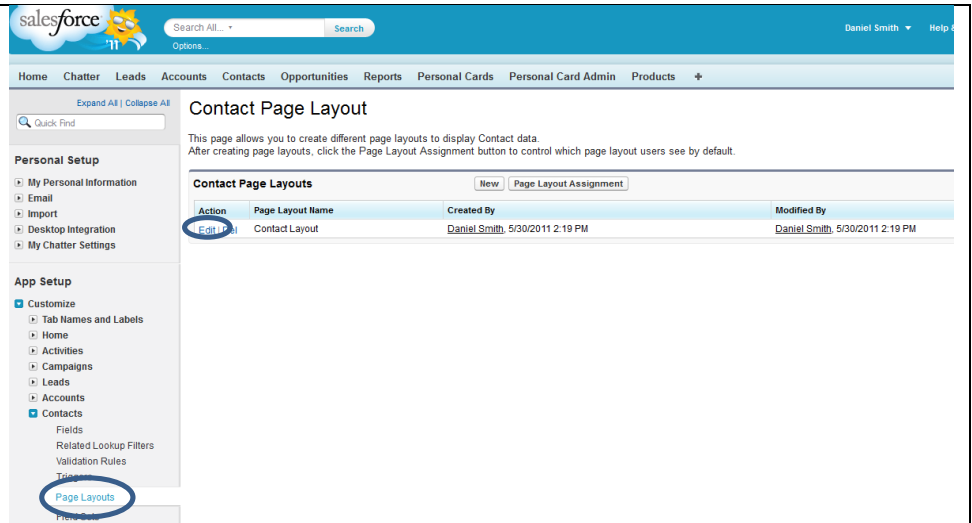
Please do not reply to this message. For support inquiries, please contact us at support@seveninteractions.com.

7. Configure the Contact, Account and Opportunity Page Layouts (Optional)

In order to send personal cards directly from a Contact, Account or Opportunity, you must follow these easy steps to configure the Contact, Account and Opportunity page layouts.

A. In Setup, under App Setup, expand 'Customize', expand 'Contacts' and select 'Page Layouts'.

Select 'Edit' next to 'Contact Layout' or the name of your custom Contact layout.

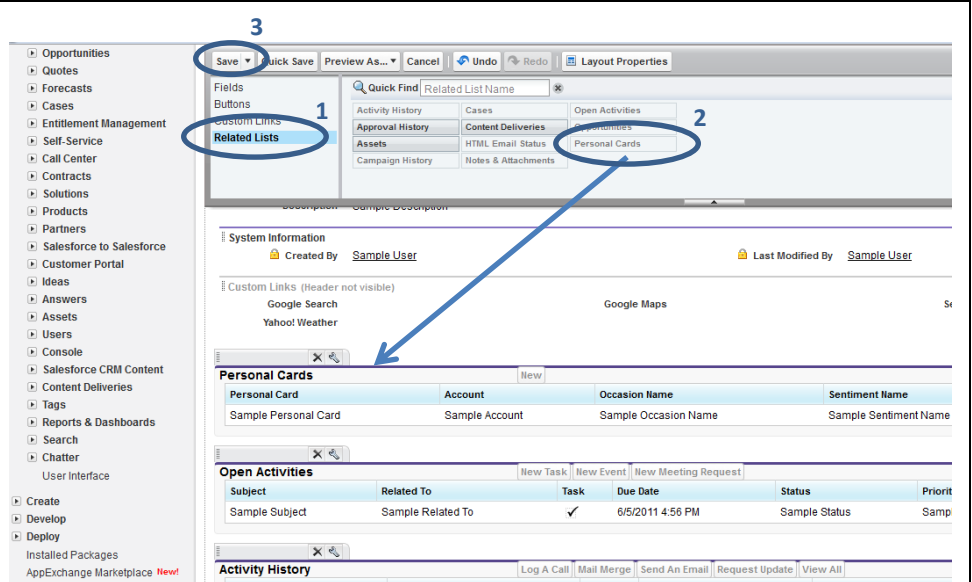


The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'App Setup', 'Customize' is expanded, and 'Contacts' is selected. 'Page Layouts' is circled in blue. The main content area is titled 'Contact Page Layout'. It shows a table of 'Contact Page Layouts' with columns: Action, Page Layout Name, Created By, and Modified By. The 'Contact Layout' is listed, and the 'Edit' link next to it is circled in blue.

B. Within the Contact Page Layout, click on 'Related Lists.'

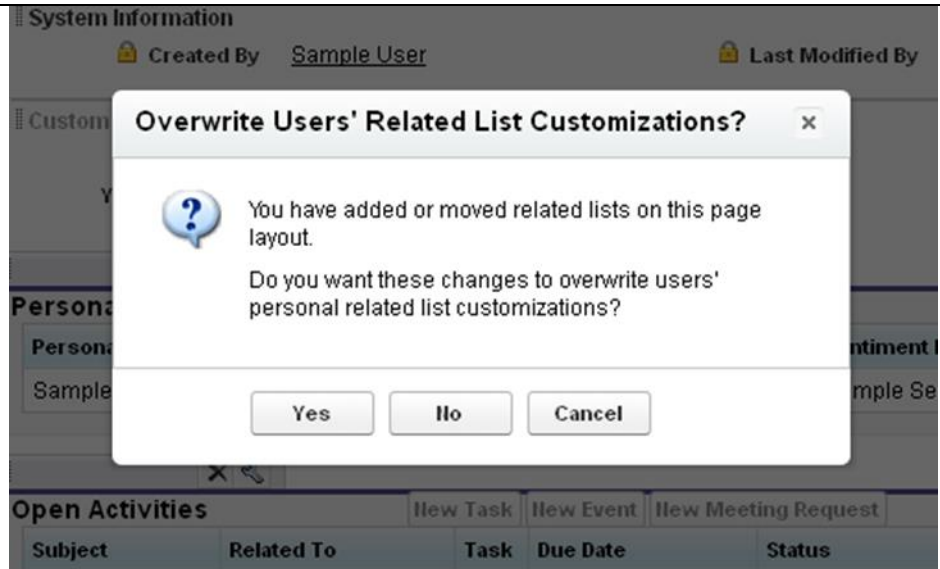
Select 'Personal Cards' and drag and drop the related item onto the page layout. It can be placed anywhere on the page – it is shown at the top in this example.

Press the 'Save' button when you are finished to save the layout.



The screenshot shows the 'Contact Page Layout' editor. On the left sidebar, 'Related Lists' is circled in blue and labeled with a '1'. In the main area, the 'Related List Name' dropdown is open, and 'Personal Cards' is selected, circled in blue, and labeled with a '2'. The 'Save' button at the top is circled in blue and labeled with a '3'. A blue arrow points from the 'Personal Cards' selection to the 'Personal Cards' section on the page layout, which is currently empty.

C. When prompted, enable the related lists to be displayed for all of the desired users by pressing the 'Yes' button.



Repeat the above steps for 'Accounts' and 'Opportunities'. This will allow easy access to sending personal cards directly from the Contacts, Accounts, and Opportunities. It will also allow you to see all personal cards related to these objects.

8. Include Company Logo in Printed Cards (Optional)

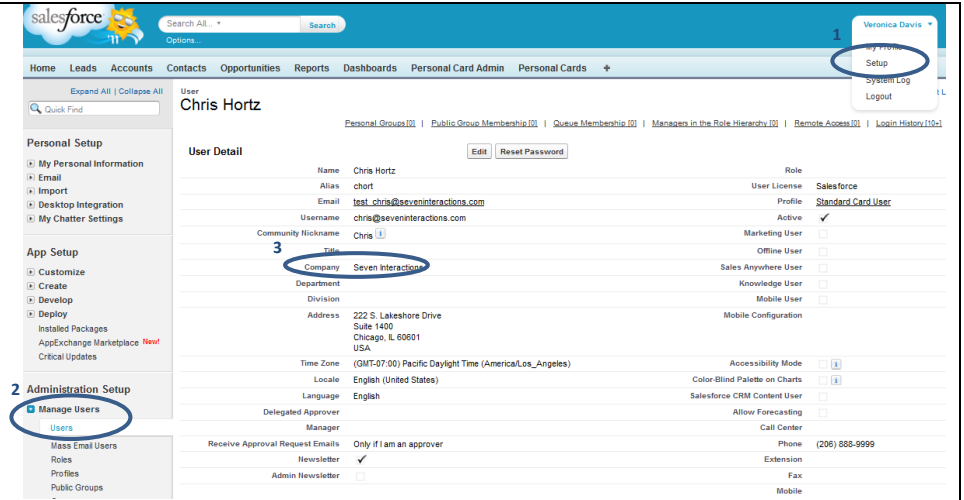
Seven Interactions offers the capability to include a company logo on the inside, blank flap of the printed card. Follow the steps below to configure your system to include logos.

A. Company specific logos will be printed in color on the inside, blank flap of the card. Logos must meet specifications to produce a high quality print card product. You can choose to have one logo for your entire organization or you can choose to have multiple logos – one logo for each company within your organization. Note: If a Gift Card is included with a Personal Card, a company logo will not appear in the printed card. Instead, the Gift Card will be printed in the same location.	<i>Inside of card</i>  <i>Card Fold</i> We really do appreciate great customers like you and want to take a minute to thank you for your business. <i>Dear Brad,</i> <i>It has been a pleasure working with you for the past five years. I'm</i> <i>looking forward to many more great years working together.</i> <i>Best Regards, Veronica</i> <i>Seven Interactions</i>
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B. First, determine if every Salesforce user will use the same company logo, or if you would like a separate logo for each company within your organization.

If you will require multiple logos for your organization, you must specify the company names for each logo exactly as they appear within Salesforce. The card sending system must be able to make an exact match (case, spaces, etc.) to include the correct logo in the card. Each Salesforce user who wants to include a company specific logo in the printed cards must update the company name to match the logo name exactly.

If you require only one logo for all users within your organization, you do not need to configure each user with a company name. With a single logo, all Salesforce users will automatically be assigned to that logo and all Personal Cards will be printed with the logo.



The screenshot shows the Salesforce interface for a user named Chris Hartz. The left sidebar contains the 'Administration Setup' link, which is circled and labeled '2'. The top right corner shows the user menu, which is circled and labeled '1'. The main content area displays the 'User Detail' for Chris Hartz, with the 'Company' field circled and labeled '3', showing the value 'Seven Interactions'.

C. Send the logo files and associated company names to the Seven Interactions team. Email logo assets to support@seveninteractions.com. Logo Specifications: - 300 DPI - 1 inch or larger - CMYK (4 color process) - EPS or vector art are preferred (high res jpeg will also work)	<i>Sample Logo and Naming Convention</i> Logo Company Name (for more than one logo, the Logo Company Name must match Company name <u>exactly</u> as it appears in Salesforce): Seven Interactions Logo File: seveninteractions logo.jpeg 
D. When a Salesforce user creates a card, the logo associated with that user will automatically be printed with all cards created and sent by that user.	<i>Inside of card</i>  <i>With warm congratulations.</i> <i>Dear Brad,</i> <i>Congratulations on ten years with Fontaine International. It has been a pleasure working with you.</i> <i>Kindest regards, Veronica</i> <i>Card Fold</i>

Uninstallation Instructions

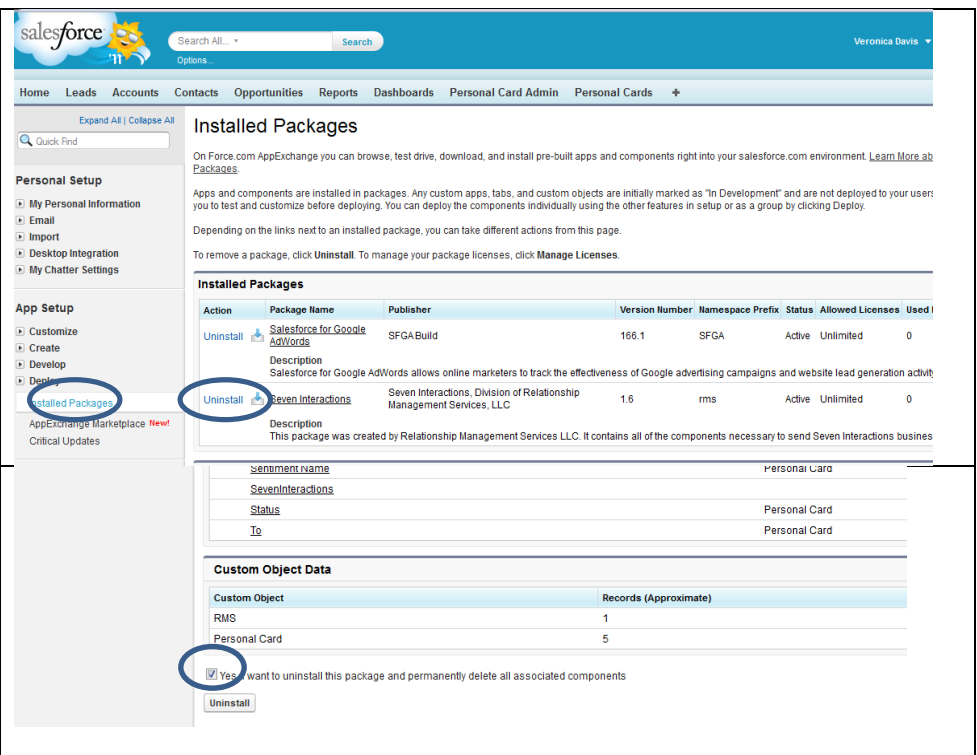
In the event you wish to discontinue use of Seven Interactions Personal Card service, we highly recommend you cancel the service through the Personal Card Admin tab. You can then remove the Personal Card Admin and Personal Card tabs from the top navigation. However, all card sending history will remain, and you will be able to re-activate the service easily in the future.

However, if you wish to uninstall the Seven Interactions Personal Card service, you can do so by following these instructions. **All personal card history will be lost if the application is uninstalled.**

A. In Setup, under App Setup, click on the 'Installed Packages' link.

Click on the 'Uninstall' link beside the Seven Interactions package.

B. Check the 'Yes, I want to uninstall the package and permanently delete all associated components' checkbox and press the 'Uninstall' button.



Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users; you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses
Uninstall	Salesforce for Google AdWords	SFGA Build	166.1	SFGA	Active	Unlimited	0
	Description: Salesforce for Google AdWords allows online marketers to track the effectiveness of Google advertising campaigns and website lead generation activity.						
Uninstall	Seven Interactions	Seven Interactions, Division of Relationship Management Services, LLC	1.6	rms	Active	Unlimited	0
	Description: This package was created by Relationship Management Services LLC. It contains all of the components necessary to send Seven Interactions business cards.						

Custom Object Data

Custom Object	Records (Approximate)
RMS	1
Personal Card	5

☒ Yes, I want to uninstall this package and permanently delete all associated components

[Uninstall](#)

Support

If you have any issues or questions with setup and installation, please contact us at support@seveninteractions.com. This is your most efficient means of getting your questions answered. All inquiries are answered within 24 hours during business hours.