

Corporate Gift for Salesforce User Guide -

In this guide, we will walk you through how to use the Corporate Gift for Salesforce App.

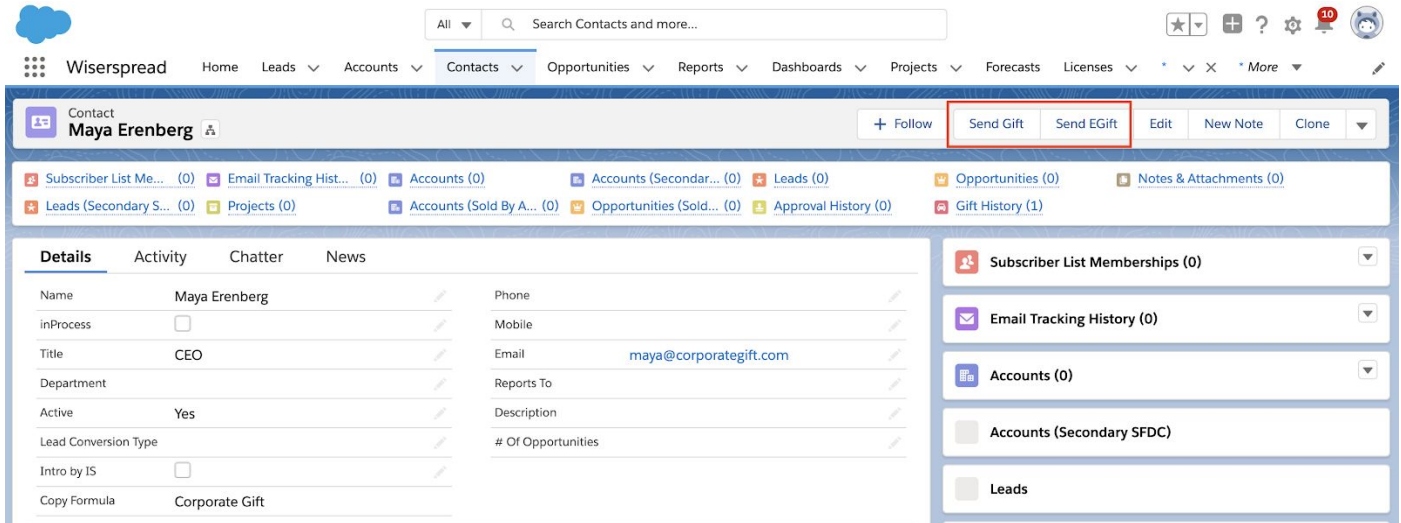
The guide will include the following -

- How to send gifts/e-gifts
- How to mass send gifts/e-gifts
- How to add your greeting to all gift recipients
- How to track the status of your gift
- Error messages
- Reports

Let's get started!

1. Send a single Gift/eGift (to a Lead or Contact)

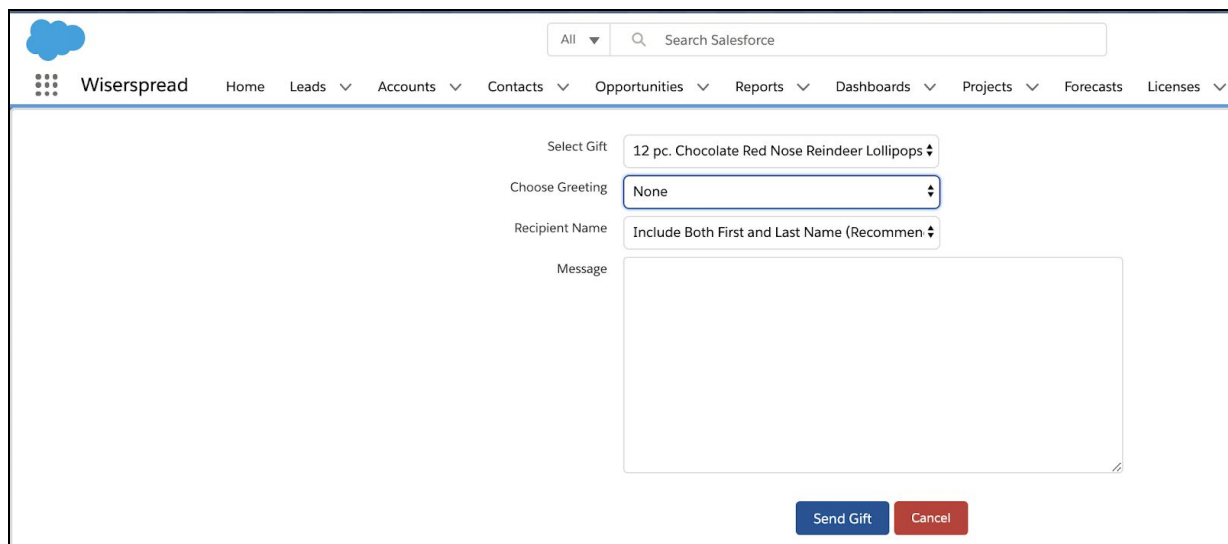
- a. From the lead or Contact record, Click '*Send Gift*' or '*Send eGift*' based on your preference



The screenshot shows the Salesforce interface for a contact named Maya Erenberg. The top navigation bar includes 'Wiserspread' and various tabs like Home, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Projects, Forecasts, Licenses, and More. The 'Contacts' tab is active. The contact record for Maya Erenberg is displayed, with fields for Name, Title (CEO), Department, Active status, Lead Conversion Type, Intro by IS, and Copy Formula (Corporate Gift). The 'Details' tab is selected. On the right side, there are buttons for '+ Follow', 'Send Gift', 'Send EGift', 'Edit', 'New Note', and 'Clone'. The 'Send Gift' and 'Send EGift' buttons are highlighted with a red box.

- b. From the next page, choose -

- i. The gift
- ii. Greeting (Hi, Hello, etc)
- iii. Recipient Name view - First name and last name', First name only or last name only
- iv. Write your message - **IMPORTANT! Make sure to add the message ONLY! No need to add the customer first name/last name/greeting as it will be added automatically after you click 'Send Gift'**
- v. Click 'Send Gift' - A 'Success!' message will appear



The screenshot shows the 'Send Gift' dialog box in Salesforce. It has a title bar with the Salesforce logo and a search bar. The main content area contains four fields: 'Select Gift' (a dropdown menu showing '12 pc. Chocolate Red Nose Reindeer Lollipops'), 'Choose Greeting' (a dropdown menu showing 'None'), 'Recipient Name' (a dropdown menu showing 'Include Both First and Last Name (Recommen)'), and 'Message' (a large text area). At the bottom right, there are two buttons: 'Send Gift' (blue) and 'Cancel' (red).

2. How to Send Mass gifts/eGifts

- You can choose to send gifts from List Views of Leads, Accounts or Contacts.
- Check the checkbox next to a lead/contact/account you wish to send a gift to - you can choose one (or more, in case you wish to mass send gifts)
- Open the list view buttons list and choose if you wish to send a Gift or an eGift

The screenshot shows the Salesforce interface with the 'Contacts' tab selected. A list of 7 contacts is displayed, with the first 4 items selected (checked). A red box highlights the 'Send Gifts' button in the right-hand menu. Another red box highlights the 'Send e-Gift' button. The table below shows the selected contacts:

	Name ↑	Account Name	Title	Phone	Email
1	☒ Andy Young	Dickenson plc	SVP, Operations	(785) 241-6200	a_young@dickenson.com
2	☐ Arthur Song	United Oil & Gas Corp.	CEO	(212) 842-5500	asong@uog.com
3	☒ Ashley James	United Oil & Gas, UK	VP, Finance	+44 191 4956203	ajames@uog.com
4	☒ Avi Green	United Oil & Gas Corp.	CFO	(212) 842-5500	agreen@uog.com
5	☒ Babara Levy	Express Logistics and Transport	SVP, Operations	(503) 421-7800	b.levy@expressl&t.net
6	☐ Edna Frank	GenePoint	VP, Technology	(650) 867-3450	efrank@genepoint.com
7	☐ Jack Rogers	Burlington Textiles Corp of America	VP, Facilities	(336) 222-7000	jrogers@burlington.com

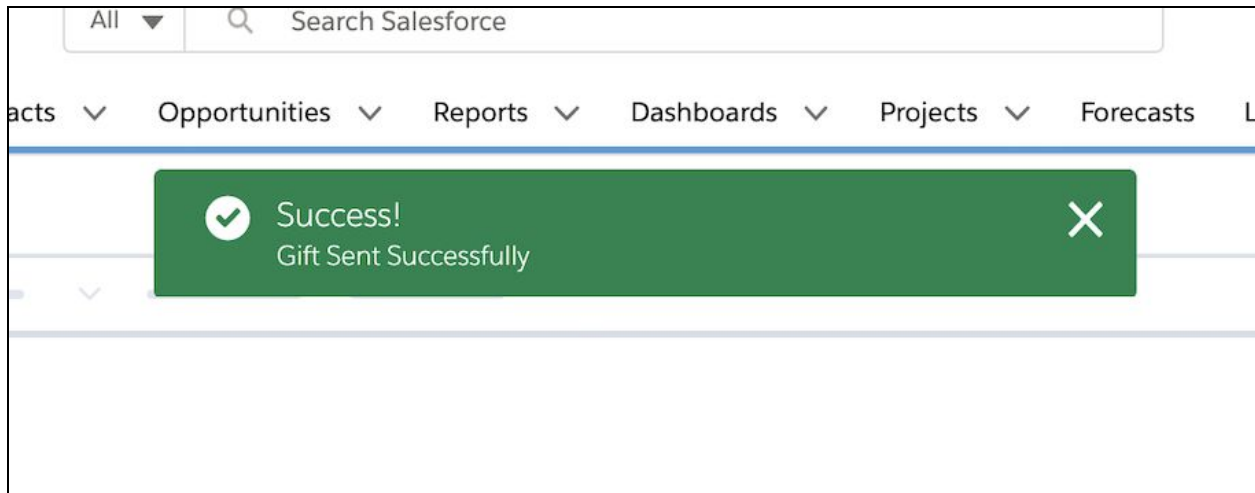
- From the next page, choose -
 - The gift
 - Greeting (Hi, Hello, etc)
 - Recipient Name view - "First name and last name, First name only or last name only
 - Write your message - **IMPORTANT! Make sure to add the message ONLY!**
No need to add the customer first name/last name/greeting as it will be added automatically after you click 'Send Gift'

The screenshot shows the Wiserspread form for sending a gift. The form includes the following fields:

- Select Gift: 12 pc. Chocolate Red Nose Reindeer Lollipops
- Choose Greeting: None
- Recipient Name: Include Both First and Last Name (Recommended)
- Message: (Empty text area)

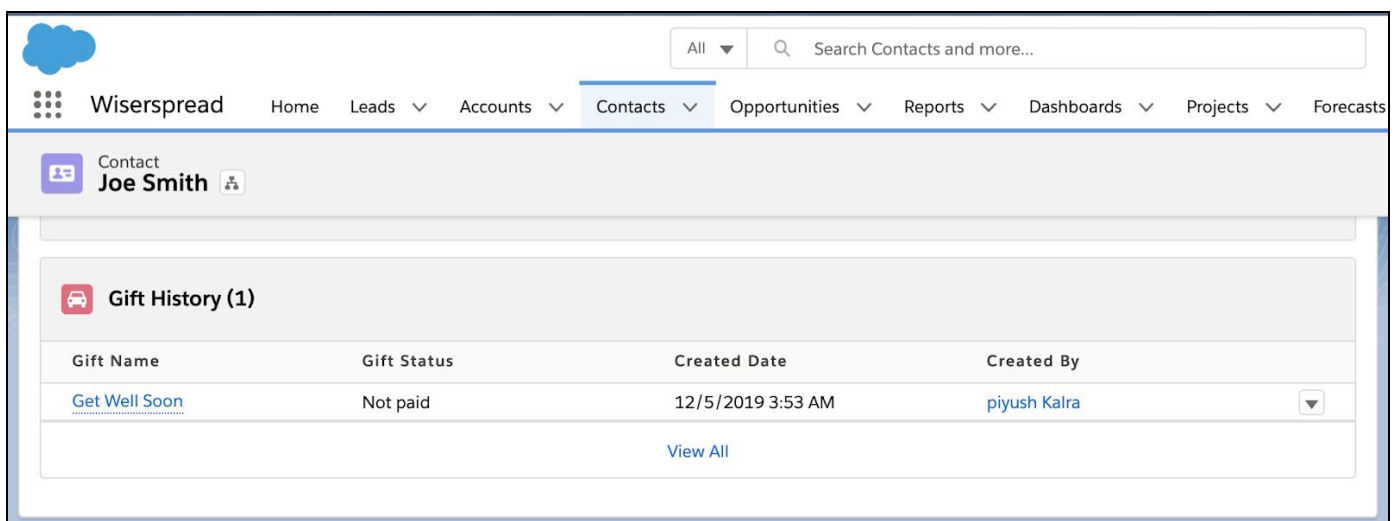
At the bottom of the form are two buttons: "Send Gift" and "Cancel".

- v. Click 'Send Gift' - A 'Success!' message will appear

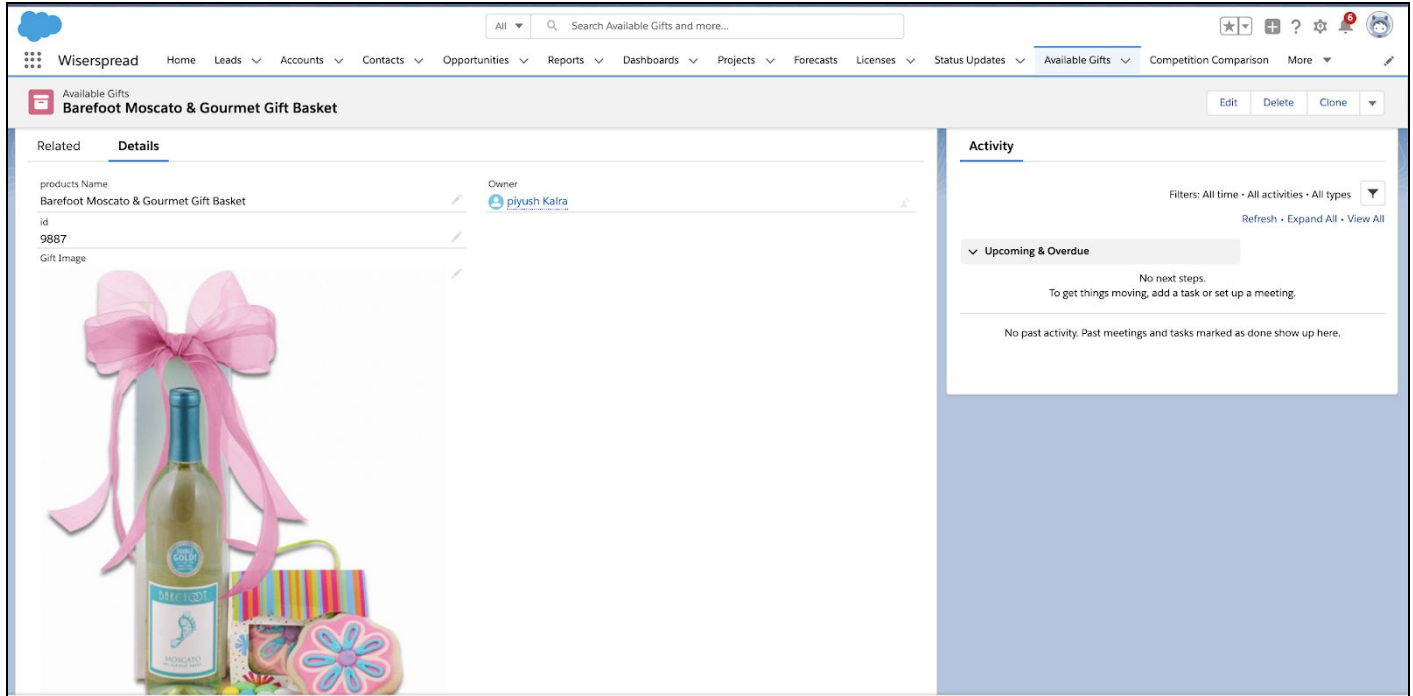


3. Check Gifts Status

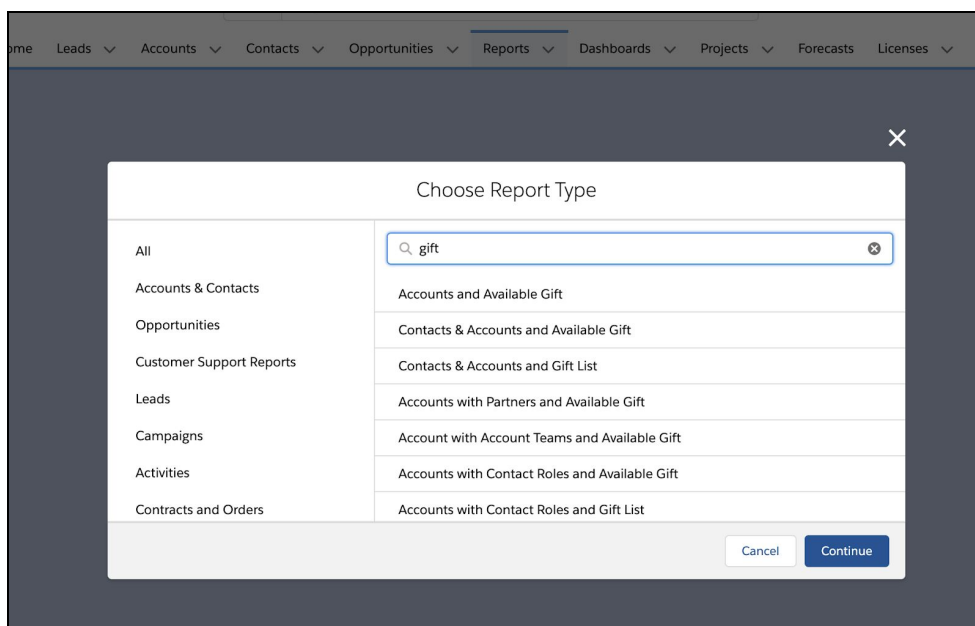
- a. As part of the Corporate Gift for Salesforce app, we added a custom object name 'Gift History'. We recommend customers to add it to the Lead/Account/Contact page layout (see image below)
- b. The 'Gift History' related list will show -
 - i. Number of gifts sent to this Lead/Account/Contact
 - ii. When gifts were sent, by whom and the status



4. **Available Gifts** - Once the app set up is completed, your occasion page gifts will show up in Salesforce under 'Available Gifts' object. You can look at all available gifts see an image of what will be sent

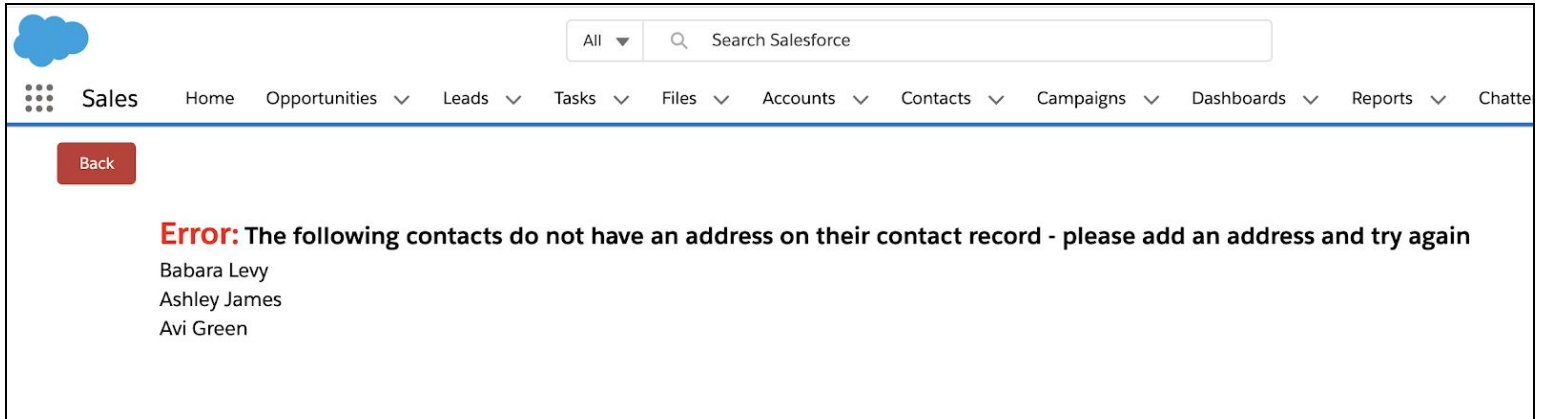


5. **Reports** - Users can run reports on gifts, once you create a new report, search for 'Gift' to see all available related objects to run your report on

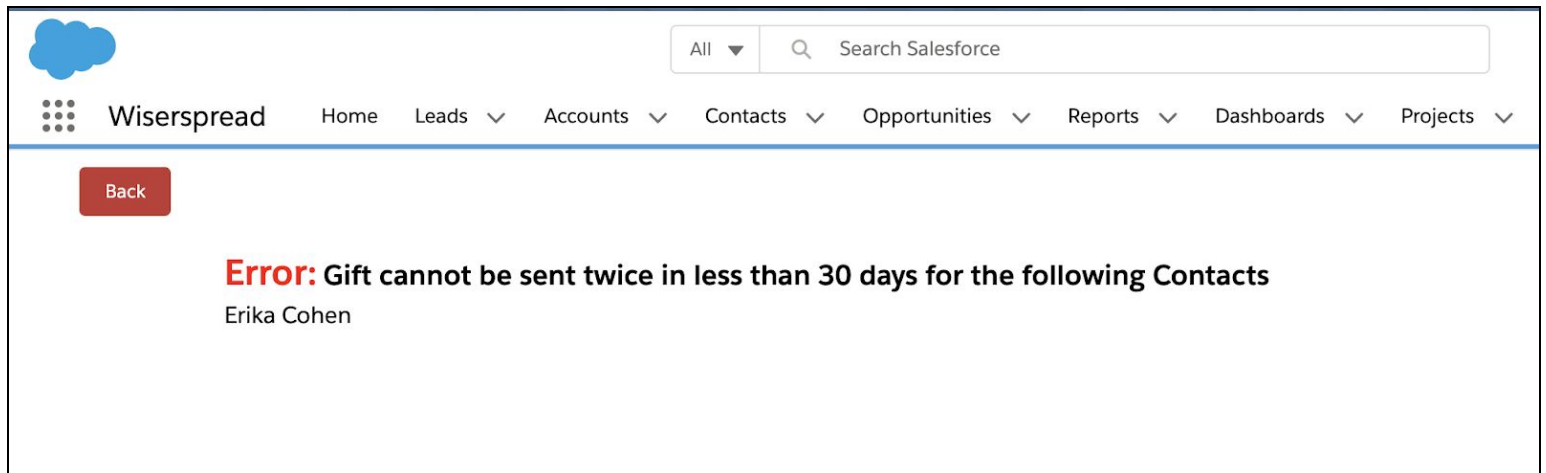


6. **Error Messages** - There are 2 validations that you need to be aware of -

- a. No Address - In case a lead/contact/account does not have a valid address. This only applies to physical gifts. If you are trying to send an e-Gift this validation will not apply.



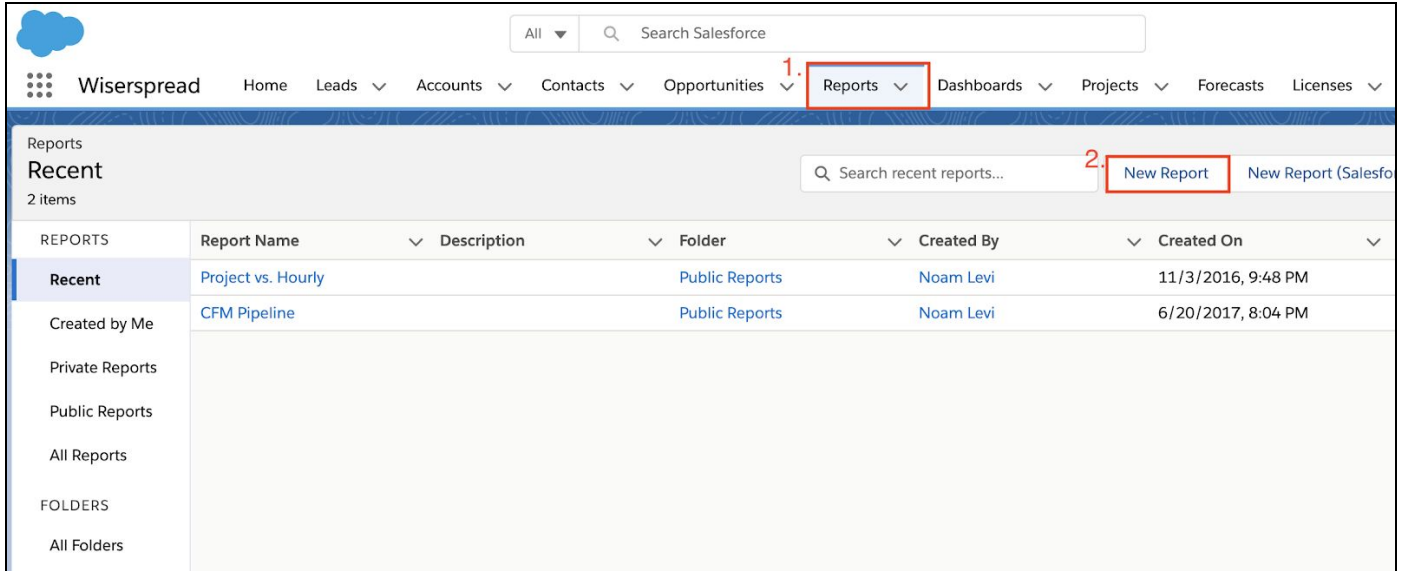
- b. Second Gift in less than 30 days - By default, the app limits sending a gift to a lead/contact/account twice in less than 30 days



- c. No email address - In case a lead/contact does not have a valid email address

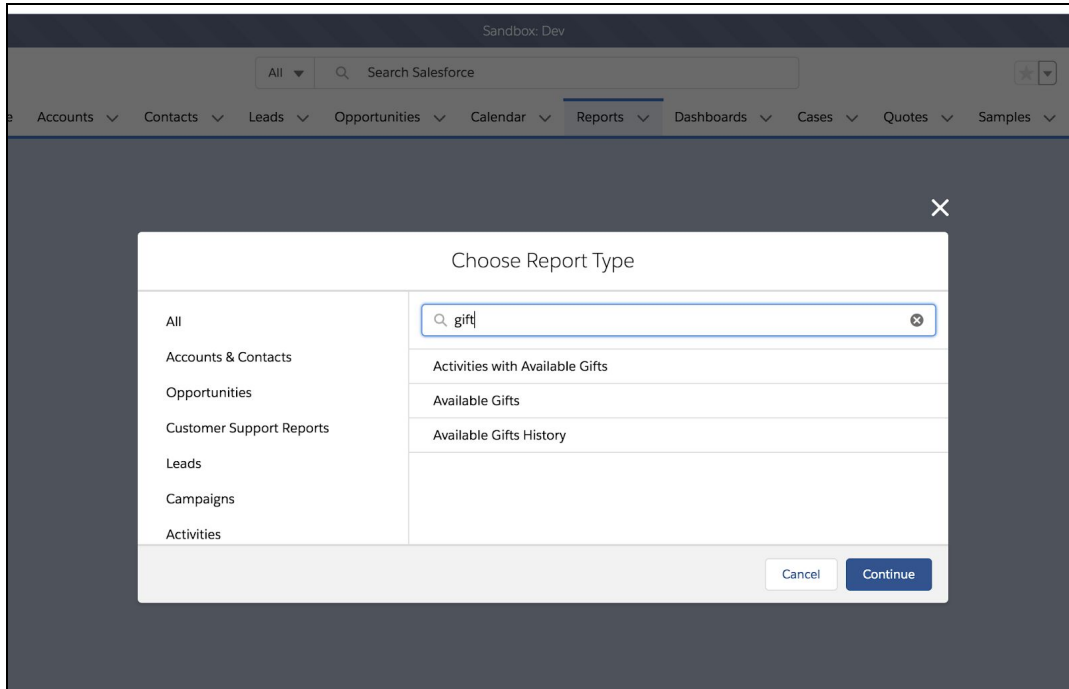
7. Report and Dashboards

- a. You can run reports on all gifting data; what was sent, when, to whom, statuses and more.
- b. In order to run gifting reports, simply click on the 'Reports' object and then 'New Report'



REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Project vs. Hourly		Public Reports	Noam Levi	11/3/2016, 9:48 PM
Created by Me	CFM Pipeline		Public Reports	Noam Levi	6/20/2017, 8:04 PM
Private Reports					
Public Reports					
All Reports					
FOLDERS					
All Folders					

- c. On the next view, use the 'Gift History' object



Choose Report Type

Search: gift

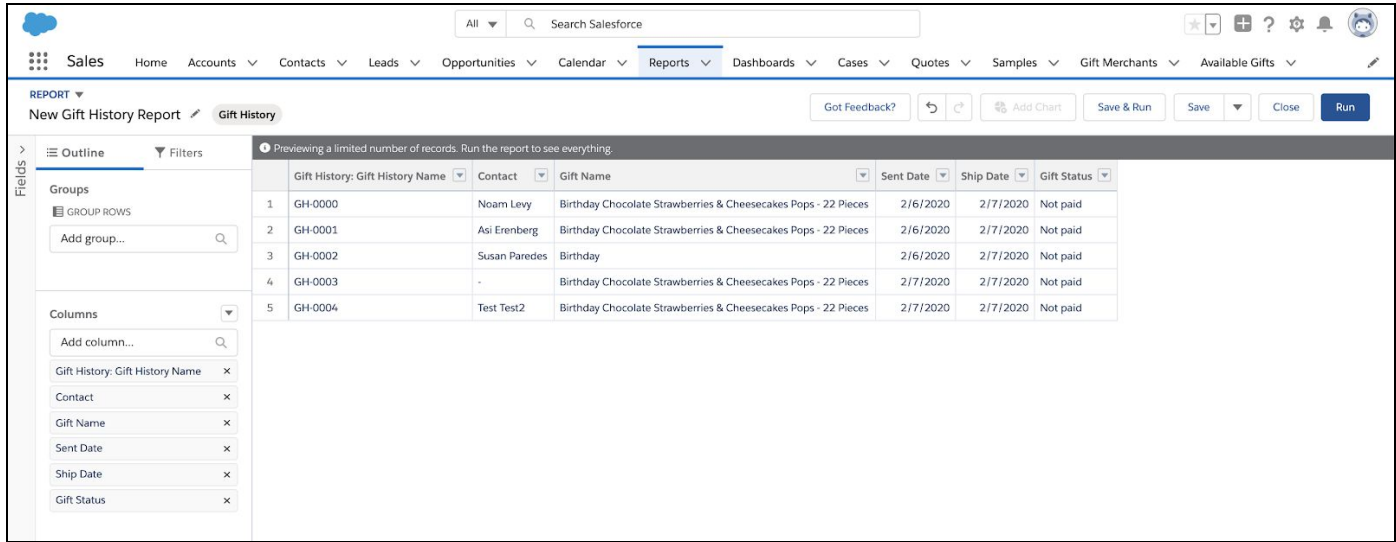
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities

- Activities with Available Gifts
- Available Gifts
- Available Gifts History

Cancel Continue

Salesforce User Guide

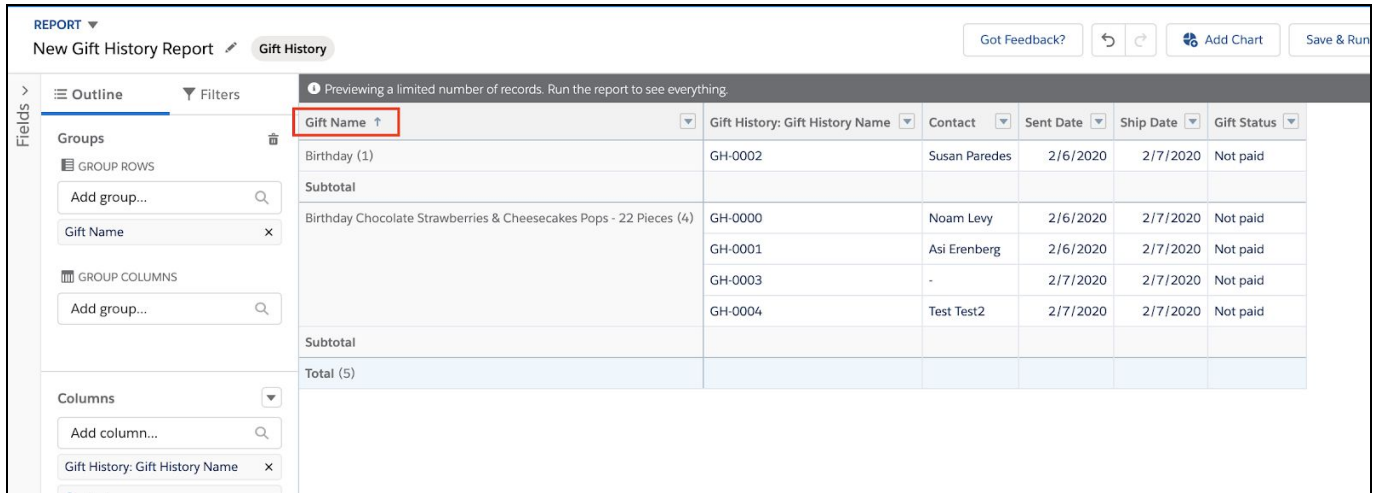
Here is a sample report of all gifts -



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Sales', 'Home', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Calendar', 'Reports', 'Dashboards', 'Cases', 'Quotes', 'Samples', 'Gift Merchants', and 'Available Gifts'. The 'Reports' tab is active, showing a 'New Gift History Report' with a 'Gift History' filter. The report preview shows a table with columns: Gift History: Gift History Name, Contact, Gift Name, Sent Date, Ship Date, and Gift Status. The table contains 5 rows of data.

	Gift History: Gift History Name	Contact	Gift Name	Sent Date	Ship Date	Gift Status
1	GH-0000	Noam Levy	Birthday Chocolate Strawberries & Cheesecakes Pops - 22 Pieces	2/6/2020	2/7/2020	Not paid
2	GH-0001	Asi Erenberg	Birthday Chocolate Strawberries & Cheesecakes Pops - 22 Pieces	2/6/2020	2/7/2020	Not paid
3	GH-0002	Susan Paredes	Birthday	2/6/2020	2/7/2020	Not paid
4	GH-0003	-	Birthday Chocolate Strawberries & Cheesecakes Pops - 22 Pieces	2/7/2020	2/7/2020	Not paid
5	GH-0004	Test Test2	Birthday Chocolate Strawberries & Cheesecakes Pops - 22 Pieces	2/7/2020	2/7/2020	Not paid

Users can use the standard Salesforce reporting functionality to group gifts, sort by leads/accounts/contacts and more and create a gifting dashboard



The screenshot shows the Salesforce Reports interface with the 'New Gift History Report' grouped by 'Gift Name'. The 'Gift Name' column is highlighted with a red box. The report preview shows a table with columns: Gift Name, Gift History: Gift History Name, Contact, Sent Date, Ship Date, and Gift Status. The table is grouped by 'Gift Name' and includes subtotals and a total row.

Gift Name	Gift History: Gift History Name	Contact	Sent Date	Ship Date	Gift Status
Birthday (1)	GH-0002	Susan Paredes	2/6/2020	2/7/2020	Not paid
Subtotal					
Birthday Chocolate Strawberries & Cheesecakes Pops - 22 Pieces (4)	GH-0000	Noam Levy	2/6/2020	2/7/2020	Not paid
	GH-0001	Asi Erenberg	2/6/2020	2/7/2020	Not paid
	GH-0003	-	2/7/2020	2/7/2020	Not paid
	GH-0004	Test Test2	2/7/2020	2/7/2020	Not paid
Subtotal					
Total (5)					