

Peer to Peer Employee Reward & Recognition Service on Salesforce Platform

Build a culture of appreciation with happier employees

Thanks Go Install Guide



Install Thanks Go on your Salesforce org

https://login.salesforce.com/package/installPackage.apexp?p0=04t10000000zQDe

1. Login your salesforce org as System administrator
2. Input install URL provided by Phone Appli Inc.
3. Latest version "1.50008" is bellow;

<https://login.salesforce.com/package/installPackage.apexp?p0=04t0o000003QOgn>

Setup

Home Object Man

Data

Email

PLATFORM TOOLS

Apps

App Manager

AppExchange Marketplace

Connected Apps

Installed Packages

Lightning Bolt

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing 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. This allows 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.

Help for this Page ?

salesforce appexchange

Visit AppExchange »

Start installation



Install Employee
Recognition & Reward
Program - Peer-to-Peer
Appreciation by Thanks Go
By Phone Appli Inc.

1. Select Install type
2. Click Install button

☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name

Employee Recognition &
Reward Program - Peer-to-
Peer Appreciation by Thanks
Go

Publisher

Phone Appli Inc.

Version Name

1.50005

Version Number

1.50005

Wait for installation...



Install Employee
Recognition & Reward
Program - Peer-to-Peer
Appreciation by Thanks Go
By Phone Appli Inc.

 Installing and granting access to all Users.

App Name	Publisher	Version Name	Version Number
Employee Recognition & Reward Program - Peer-to-Peer Appreciation by Thanks Go	Phone Appli Inc.	1.50005	1.50005



Install Employee
Recognition & Reward
Program - Peer-to-Peer
Appreciation by Thanks Go
By Phone Appli Inc.

1. Click Done

 This app is taking a long time to install.
You will receive an email after the installation has completed.

Done

App Name	Publisher	Version Name	Version Number
Employee Recognition & Reward Program - Peer-to-Peer Appreciation by Thanks Go	Phone Appli Inc.	1.50005	1.50005

Setup initial configuration: Permission



Setup

Home

Object Manager ▼

Quick Find

Setup Home

Lightning Experience Transition Assistant

Lightning Usage

ADMINISTRATION

▼ Users

Permission Sets

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Users

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SETUP

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store

All ▼ Edit | Delete | Create New View

New



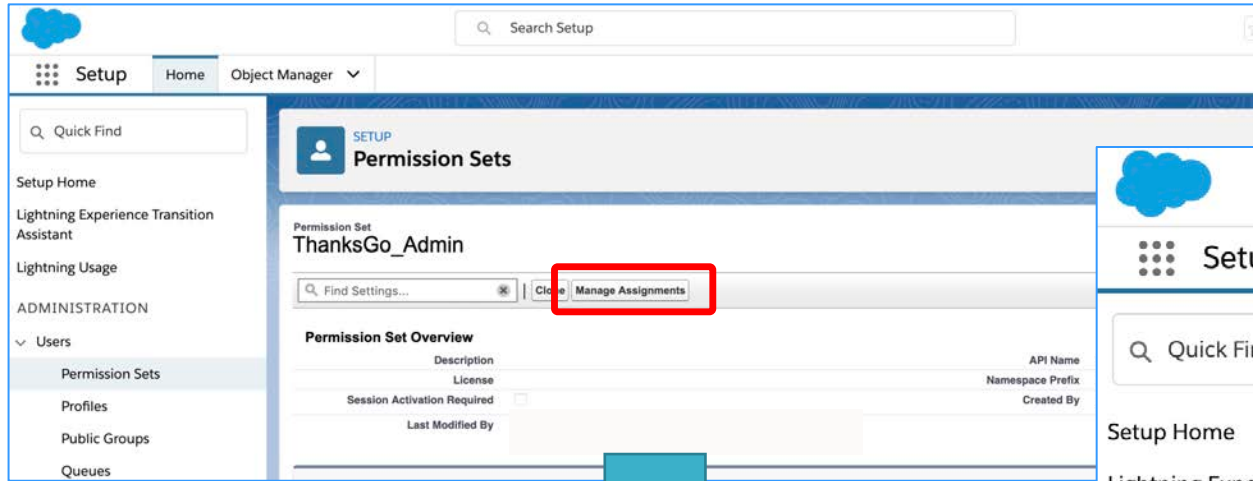
A B C D E F G H I J K L M N

☐	Action	Permission Set Label ↑	Description	License
☐	Clone	CRM User	Denotes that the user is a Sal...	CRM User
☐	Clone	PhoneAppli		
☐	Clone	PhoneAppli_Admin		
☐	Clone	Salesforce Console User		User
☐	Clone	Standard Einstein Activity Ca...		ein Activity ...
☐	Clone	ThanksGo		
☐	Clone	ThanksGo_Admin		

Select "ThanksGo" to assign Standard Users

Select "ThanksGo Admin" to assign System Administrators

Assign Permission to users



This screenshot shows the 'Permission Sets' page in Salesforce Setup. The 'Manage Assignments' button is highlighted with a red box. A large blue arrow points from this button to the 'Users' page in the bottom screenshot.

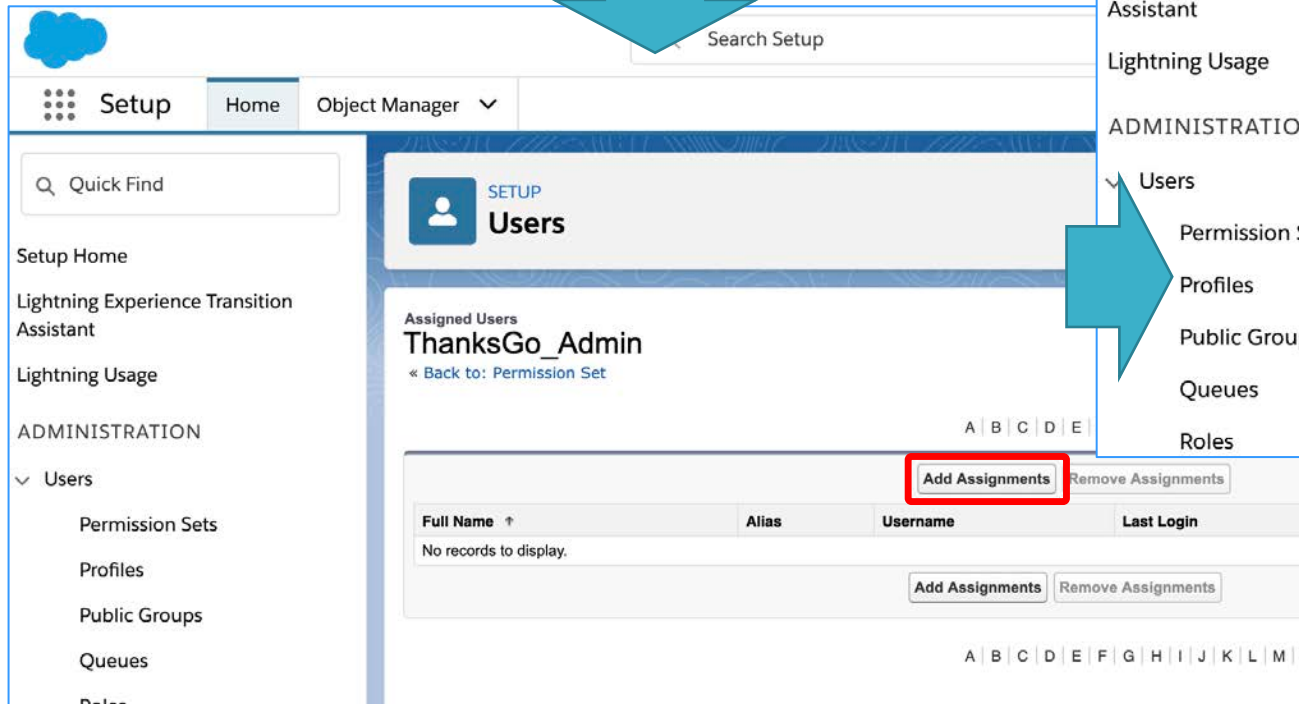
Setup Home | Lightning Experience Transition Assistant | Lightning Usage | ADMINISTRATION | Users | Permission Sets | Profiles | Public Groups | Queues

Permission Set: ThanksGo_Admin

Find Settings... | **Manage Assignments**

Permission Set Overview

Description	API Name
License	Namespace Prefix
Session Activation Required	Created By
Last Modified By	



This screenshot shows the 'Users' page in Salesforce Setup. The 'Add Assignments' button is highlighted with a red box. A large blue arrow points from this button to the 'Users' page in the top screenshot.

Setup Home | Lightning Experience Transition Assistant | Lightning Usage | ADMINISTRATION | Users | Permission Sets | Profiles | Public Groups | Queues | Roles

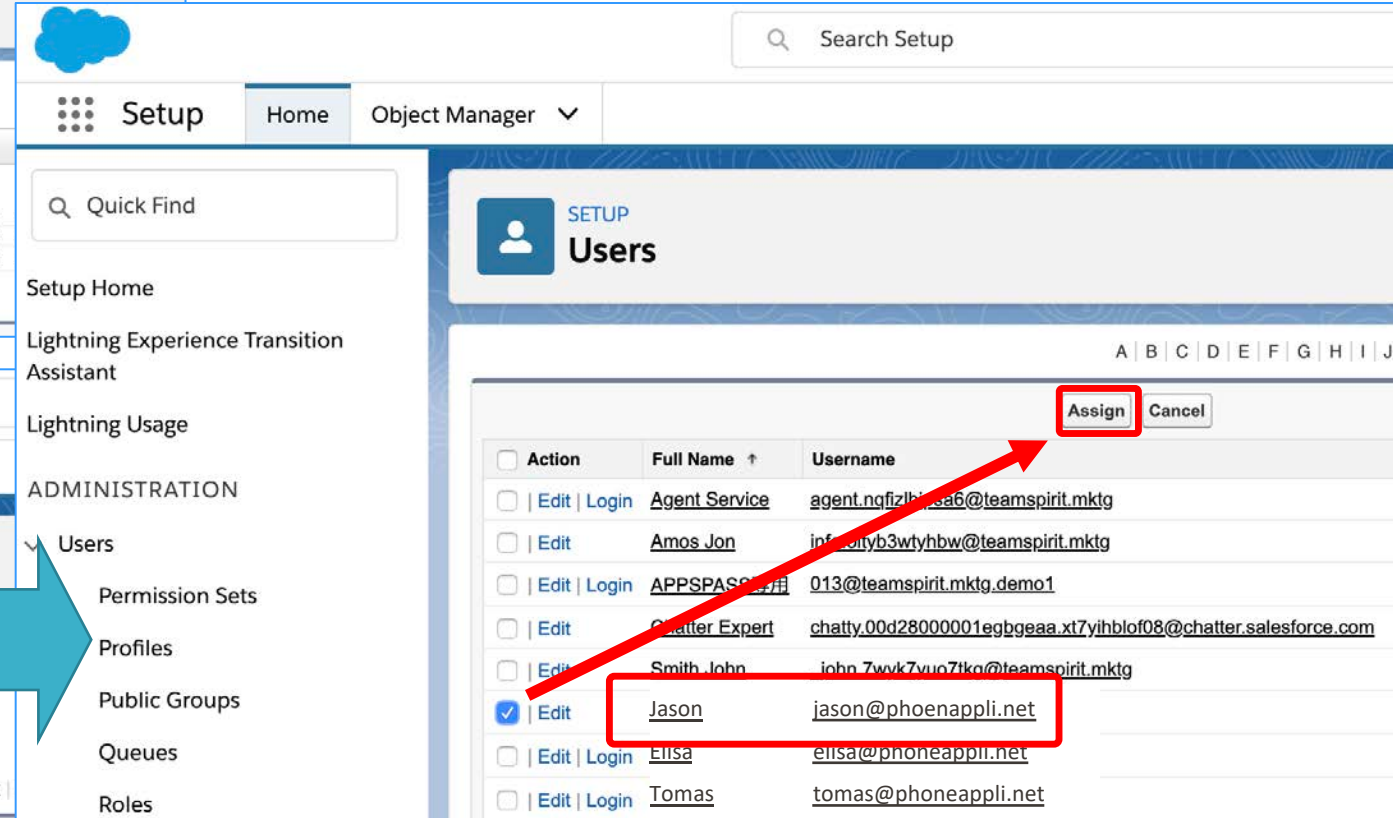
Assigned Users: ThanksGo_Admin

« Back to: Permission Set

Add Assignments | Remove Assignments

Full Name ↑	Alias	Username	Last Login
No records to display.			

Add Assignments | Remove Assignments



This screenshot shows the 'Users' list page in Salesforce Setup. The 'Assign' button is highlighted with a red box. A red arrow points from this button to the 'Users' page in the bottom screenshot.

Setup Home | Lightning Experience Transition Assistant | Lightning Usage | ADMINISTRATION | Users | Permission Sets | Profiles | Public Groups | Queues | Roles

Assign | Cancel

Action	Full Name ↑	Username
☐ Edit Login	Agent Service	agent.ngfzlbh...@teamspirit.mktg
☐ Edit	Amos Jon	inf...@teamspirit.mktg
☐ Edit Login	APPSPASS	013@teamspirit.mktg.demo1
☐ Edit	Chatter Expert	chatty.00d2800001egbgeaa.xt7yihblof08@chatter.salesforce.com
☐ Edit	Smith, John	john.7wvk7yuo7itkg@teamspirit.mktg
☒ Edit	Jason	jason@phoenappli.net
☐ Edit Login	Elisa	elisa@phoneappli.net
☐ Edit Login	Tomas	tomas@phoneappli.net

Assign ThanksGo Application License to users

 Setup

Home

Object Manager 

 inst

▼ Apps

▼ Packaging

Installed Packages

▼ Einstein

▼ Einstein Platform

Einstein.ai

▼ Einstein Sales

▼ Einstein Activity Capture

Settings

▼ Readiness Assessor

Sales Cloud Einstein

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

 **SETUP**
Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your sale.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "I" before deploying. You can deploy the components individually using the other features in setup or as a group by clicking the link next to the package name.

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**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall Manage Licenses 	<u>ThanksGo</u>	Phone Appli Inc.	1.50004	thanksgo_pa
Uninstall 	<u>Salesforce and Chatter Apps</u>	Salesforce.com	1.18	sf_chttr_apps
Uninstall Manage Licenses 	<u>Desc...</u> This package contains Connected Applications for the officially supported Sales...		6	phoneappli

Select "Manage Licenses" of
ThanksGo to assign users

Install Thanks Go on your Salesforce org



 **Setup**

Home

Object Manager ▾

Public Groups

Queues

Roles

User Management Settings

Users

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PLATFORM TOOLS

▾ Apps

App Manager

AppExchange Marketplace

> Connected Apps

Installed Packages

 **Package Manager**

Package Details

ThanksGo

[Back to Previous Page](#)

Package Name	ThanksGo
Status	Trial
Expiration Date	2019/06/16

Licensed Users

A

B

C

D

E

F

G

H

I

Add users

Add Users

Remove Multiple Users

Action	Full Name ↑	Role
Remove	Jason	System Administrator

Assign users to “ThanksGo”

- Apps
- Installed Packages
- Einstein
- Einstein Platform
- Einstein.ai
- Readiness Assessor
- Sales Cloud Einstein

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

SETUP

Package Manager

Add Users

ThanksGo

View: All Create New View

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 ア カ

Available Users

Select Shown Deselect Shown Deselect All Add All Users

Action	Full Name ↑	Role	Active	Profile
☐	Agent Service		☒	System Administrator
☒	Amos Jon		☒	Trial Customer Portal User
☐	APPSPASS		☒	TSCONNECT
☒	Smith John		☐	Trial Customer Portal User
☐	Takeshi Hishiki		☒	TeamSpirit

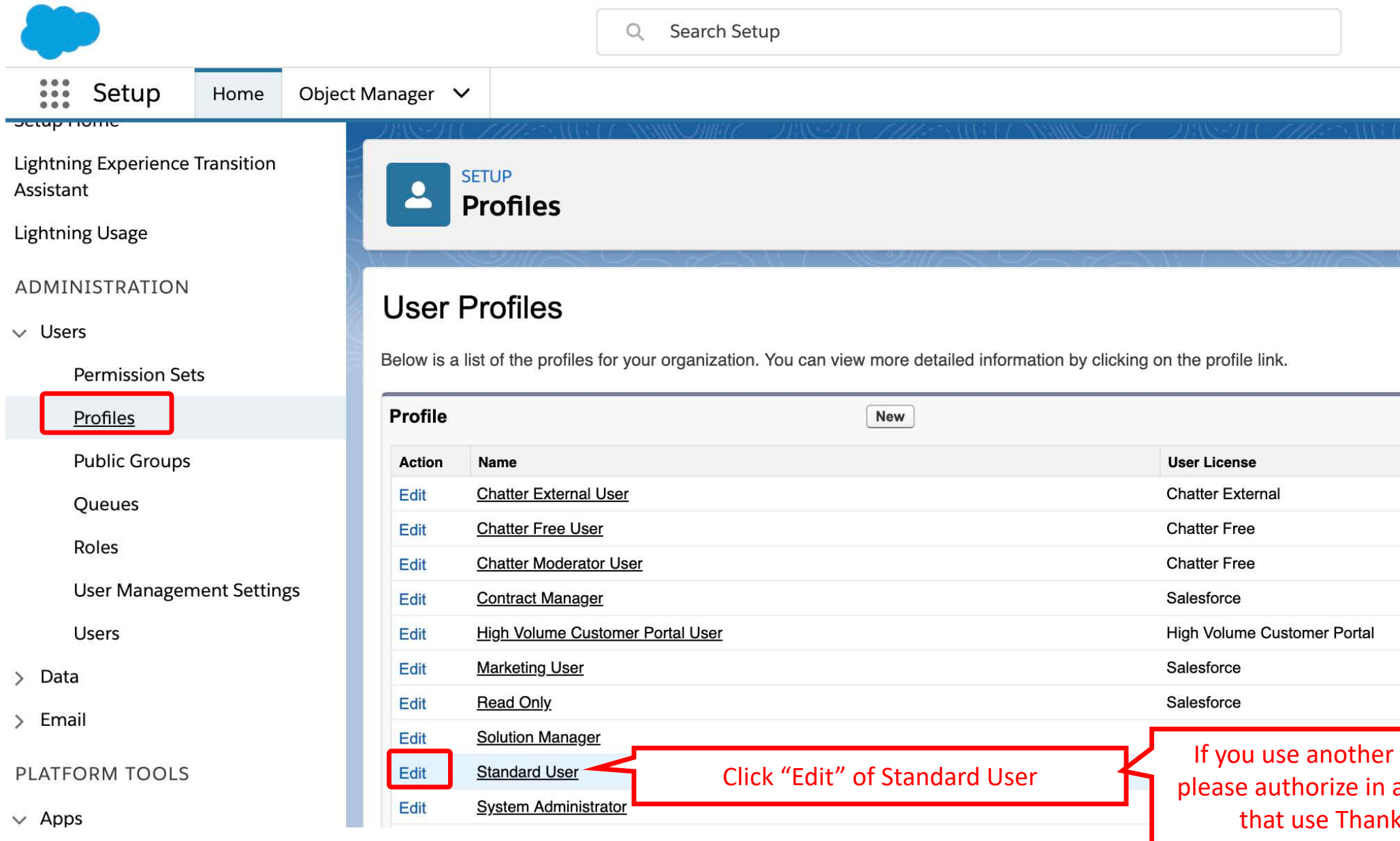
Show me more records per list page

Selected Users

Action	Full Name
☒	Amos Jon
☒	Smith John

Add Cancel

Configure "Profile" to grant access ThanksGo



The image shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories: Setup Home, ADMINISTRATION, and PLATFORM TOOLS. Under ADMINISTRATION, the 'Users' section is expanded, and 'Profiles' is highlighted with a red box. The main content area is titled 'User Profiles' and contains a table of profiles. The 'Standard User' profile is highlighted with a blue row, and its 'Edit' link is also highlighted with a red box. A red callout box points to this 'Edit' link with the text 'Click "Edit" of Standard User'. Another red callout box points to the 'Standard User' profile with the text 'If you use another profiles, please authorize in all profiles that use ThanksGo'.

Search Setup

Setup Home

Lightning Experience Transition Assistant

Lightning Usage

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SETUP Profiles

User Profiles

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Action	Name	User License
Edit	Chatter External User	Chatter External
Edit	Chatter Free User	Chatter Free
Edit	Chatter Moderator User	Chatter Free
Edit	Contract Manager	Salesforce
Edit	High Volume Customer Portal User	High Volume Customer Portal
Edit	Marketing User	Salesforce
Edit	Read Only	Salesforce
Edit	Solution Manager	
Edit	Standard User	
Edit	System Administrator	

Install Thanks Go on your Salesforce org

Setup

Home

Object Manager

Profile

Users

Profiles

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



Profile Edit Standard User

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Save

Cancel

Name Standard User
User License Salesforce

Custom Profile

Custom App Settings

! = Required Information

	Visible	Default
Chatter Answers Moderator (Chatter_Answers_Moderator)	☐	☐
Community (standard__Community)	☒	☐
Content (standard__Content)	☒	☐
Lightning Usage App (standard__LightningInstrumentation)	☒	☐
Marketing (standard__Marketing)	☒	☐
PhoneAppli (phoneappli__PhoneAppli2)	☒	☐
PhoneAppli Lightning (phoneappli__PhoneAppli)	☒	☐
Sales (standard__LightningSales)	☒	☐
Sales (standard__Sales)	☒	☒
Salesforce Chatter (standard__Chatter)	☒	☐

Check both check boxes

Sample Console (standard__ServiceConsole)	☐	☐
Service (standard__Service)	☒	☐
Service Cloud Console (Service_Cloud_Console)	☐	☐
TeamSpirit	☒	☐
Team Spirit (Teamspirit_AttokinmuApp)	☒	☐
Team Spirit Leaders (tsl_TeamSpiritLeaders)	☒	☐
Thanks Go (thanksgo__ThanksGo_Lightning)	☒	☐
Thanks Go (thanksgo__ThanksGo)	☒	☐

Connected App Access

Mobile (Salesforce1) setting



Search Setup

☆ ▼

Setup

Home

Object Manager ▼

▼ Apps

App Manager

AppExchange Marketplace

> Connected Apps

Installed Packages

> Lightning Bolt

▼ Mobile Apps

▼ Salesforce

Salesforce Branding

Salesforce Mobile Quick Start

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Package Manager

> Feature Settings

> Einstein

> Objects and Fields

> Process Automation

 **SETUP**

Salesforce Mobile Quick Start



Salesforce Mobile Setup

The mobile app allows you to bring Salesforce with you everywhere. Use the tools on this page to set up Salesforce so you can run your business from your phone.

Quick Start Wizard

Complete the essential setup tasks in only a few minutes.

Launch Quick Start Wizard

Customizable Parts of the App

(Links open the Setup page)

[Navigation Menu](#)

Security and Access Settings

(Links open the Setup page)

[Mobile Browser Option](#)
[Notification Options](#)
[Offline Cache](#)

(Links open documentation in a new window)

[App Security Controls](#)

Work With Records While Mobile

Start Quick Wizard



 Search Setup



Setup

Home

Object Manager ▼



Welcome!

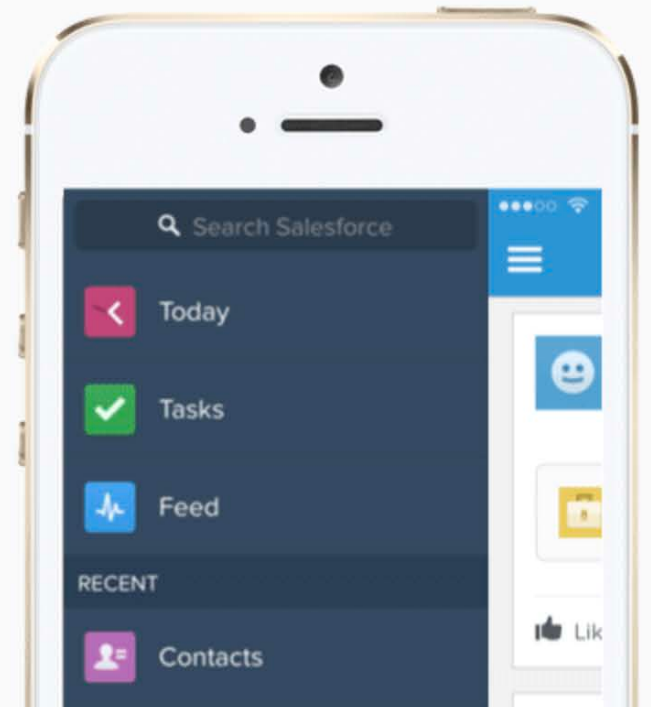
About the Quick Start Wizard

This wizard walks you through the basic setup of the Salesforce mobile app. Later, you can go to the Salesforce Setup page to explore other configuration and customization options.

Customize the Navigation Menu

In the first step you'll choose and arrange the items you want to appear in the navigation menu.

Let's Get Started



Configure Mobile Menu



Step 1: Customize the Navigation Menu

Use this page to set up the navigation menu for all users in your organization. To reorder items, drag them up and down. To remove items, drag them to the Available Items list.

Available Items

Organization Chart

External Contact

Einstein Insights

Weekly Topics

Setup

Einstein Assistant

Thanks Go Board

Navigation Menu

PhoneAppli

Chatter

Today

Dashboards

Tasks

Notes

Smart Search Items

Select "Thanks Go Board"

Back

Skip This Step

Save & Next



Step 2: Arrange Global Actions

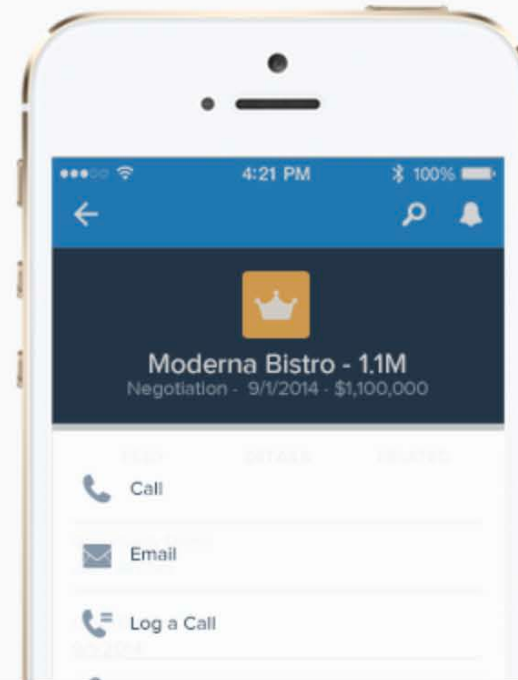
About Global Actions

Global actions give users quick access to Salesforce functions. Note that how actions appear may vary based on your version of the mobile app.

Arrange Global Actions

In this step you'll choose and arrange global actions.

Arrange Global Actions



Back

You don't need to modify "Global Actions".
Click "Next"

Next

Compact Layout



Setup

Home

Object Manager ▾



Setup Help & Training



Step 3: Create a Custom Compact Layout for Contacts

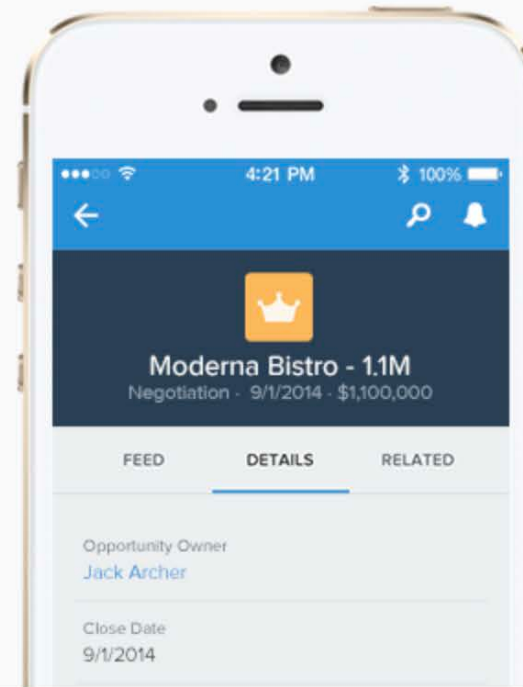
About Compact Layouts

Compact layouts show a record's key fields, such as a contact's name, email, and phone, in the highlights area at the top of the record detail.

Create a Compact Layout

In this step we'll create a custom compact layout for contacts. Later, after you've finished this wizard, you can create compact layouts for other objects as needed.

Create Compact Layout



Back

You don't need to modify "Compact Layout".
Click "Next"

Next

Send invitation emails, if you want

[Setup](#)[Home](#)[Object Manager](#) ▾[Setup](#)[Help & Training](#)

Step 5: Send Invitations

Congratulations! You've finished with the basic setup. Want to get feedback on what you've done so far? Invite some of your users to give the app a try.

To:

☐ Send to all users

takeshi.hishiki@phonea

Subject:

Your invitation for the mobile app

Compose/Edit Message

Your Salesforce administrator xxxxx has set up Salesforce mobile for your organization. Try it out and give your administrator feedback.

Send

Back

Next

All preparations are complete



OK, no invitations sent.

You can always send invitations later, from the Salesforce Setup page. You can also explore other options for customizing the app, such as adding your own branding.

Company Setting



All Search Salesforce



ThanksGo

Board

Weekly Topics

Dashboards

Reports

Setup

Setup

Setup Home

Board

Weekly Topics

Company Setting

Initial Point
500

Exchange Rate
2

"Like this" points to
From, To

Point Count Reset

Schedule
Every Mon at 03:00

Point Account Close

Schedule
On 26th at 00:00 Every Month

Company Setting

Initial Point

500

Exchange Rate

2

\$/c

"Like this" points to

From, To

From

To

Click "Like this" button to send points to your peers. Thanks points will be sent to both sender and receiver.

Cancel

Save

Edit

Edit

Edit

Point Count Reset



ThanksGo

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Company Setting

Initial Point
500

Exchange Rate
2

"Like this" points to
From, To

Point Count Reset

Schedule
Every Mon at 03:00

Point Account Close

Schedule
On 26th at 00:00 Every Month

×

Point Count Reset

Scheduled Date

Sun Mon Tue Wed Thu Fri Sat

Scheduled time

03:00

Thanks Points reset weekly. You can configure the day and time.

Cancel Save

Edit

Edit

Edit

Point Account Close



All Search Salesforce



ThanksGo

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Initial Point
500

Exchange Rate
2

"Like this" points to
From, To

Point Count Reset

Schedule
Every Mon at 03:00

Point Account Close

Schedule
On 26th at 00:00 Every Month

Point Account Close

Close Date

5th

10th

15th

20th

25th

End of Month

Scheduled time

00:00

Thanks Point account
close monthly. You can
configure the day and
time.

Cancel

Save

Edit

Edit

Edit

Setup Board setting



ThanksGo

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Search Salesforce



Setup

Setup Home

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Weekly Topics

Company Setting

Morning Backscreen Start
09:00

Evening Backscreen Start
15:00

Sending Points Pattern
1,10,39,50

Flexible Sending Points
ON

Sending Points Limit
No Limit

Hash Tag Management

Use Hash Tag?
OFF

Hash Tag Name

Company SettingEdit

Morning Backscreen Start

09:00

Evening Backscreen Start

15:00

Sending Points Pattern

1 × 10 × 39 × 50 ×

1

Flexible Sending Points

ON

OFF

Sending Points Limit

Cancel

Save

Edit

Edit

Configure Company
setting

Add new tags



ThanksGo

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Evening Backscreen Start

15:00

Sending Points Pattern

1,10,39,50

Flexible Sending Points

ON

Sending Points Limit

No Limit

Hash Tag Management

Use Hash Tag?

OFF

Hash Tag Name

Notification Setup

Chatter Notification

OFF

Notification Setup

No setting

Create New Chatter Group

×

Hash Tag Management

Use Hash Tag?

ON

OFF

Priority	Hash Tag Name	
1	Awesome	New Delete
2	Fantastic	Delete

Cancel

Save

Add new tags

Edit

Create New Chatter Group



ThanksGo

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Evening Backscreen Start

15:00

Sending Points Pattern

1,10,39,50

Flexible Sending Points

ON

Sending Points Limit

No Limit

Hash Tag Management

Use Hash Tag?

OFF

Hash Tag Name

Notification Setup

Chatter Notification

OFF

Notification Setup

No setting

Create New Chatter Group

Create New Chatter Group

Group Name

Cancel

Create New Chatter Group

Add new Chatter Group

Edit

Edit

Weekly Topic Setting



ThanksGo

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Search Salesforce



Setup

Setup Home

Board

Weekly Topics

Company Setting

Weekly Topics display Start Time

15:00

Weekly Topics display End Time

18:00

Weekly Topics display Day

Fri

Company SettingEdit

Weekly Topics display Start Time

15:00

Weekly Topics display End Time

18:00

Weekly Topics display Day

Sun

Mon

Tue

Wed

Thu

Fri

Sat

Cancel

Save

Edit

Modify Weekly Topic
Setting



ThanksGo

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Search Salesforce



Let's start! Send Thanks Card to your peer

Thank you

Characters left: 35

to 
Tom Leslie

Thank you for supporting our event!

 50P   Awesome 

from 

 Send





All ▾



Search Salesforce



ThanksGo

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Weekly Topics

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Setup



You have received 93

You have sent 330

You can send 301

New Card

Thanks Cards

☐ Sent

☐ Received

Search...

Search



Thank you ————— 06/28 03:15 PM

to 39
Sasaki Yuka

i was so fun yesterday !!
thank you :)

from
Kadokawa Haruna

21 #party

06/28 03:09 PM

THANK YOU

to 39
Suzuki Kazutomo

thank you for inviting me to
your company!!

from
Tsukada Masaaki

28

06/28 02:58 PM

Thank You!

to 50
Tsukada Masaaki

thank you for your help !!

from
Sasaki Yuka

25 #respect #speed #teamwork

Thank you ————— 06/28 02:55 PM

to 39
Watanabe Masato

welcome to our team !!!

from
Kadokawa Haruna

44 #team

06/21 02:58 AM

Thank You!

to 50
Kadokawa Haruna

Your quick reply helped a lot
for me to get back to my
customers!

06/13 03:53 AM

Thank you!!!

to 10
Tsukada Masaaki

THX





All ▾



Search Salesforce



ThanksGo

Board

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Setup



Weekly Topics

 To Watanabe Masato
39P
welcome to our team !!!

 To Sasaki Yuka
35P
Appreciated with your prompt reply on my question!

 To Suzuki Kazutomo
39P
thank you for inviting me to your company!!

 To Tsukada Masaaki
50P
thank you for your help !!

 To Sasaki Yuka
39P
i was so fun yesterday !! thank you :)

 Suzuki Kazutomo
16

 Tsukada Masaaki
28

 Sasaki Yuka
25

 Kadokawa Haruna
21

info-us@phoneappli.net

