



eGifter Rewards™

FOR SALESFORCE

USER GUIDE

OVERVIEW

What is eGifter Rewards for Salesforce?

eGifter Rewards™ is a rewards and incentives platform that seamlessly integrates with Salesforce, making it possible to send digital gift cards to individual or multiple Recipients directly from your Salesforce sales or service cloud.

What happens first?

1. Download the eGifter Rewards for Salesforce app from Salesforce AppExchange.
2. [Register](#) for a free eGifter Rewards account.
3. Once your account is approved, login to your Rewards account to get access to the API key and finalize your Salesforce setup.
4. Fund your eGifter Rewards account to begin placing orders within your Salesforce instance.

What's covered here?

This User Guide provides everything you need to need to know to get started with the eGifter Rewards for Salesforce app.

Please note: Some features in this User Guide may require advanced configuration for your account. Please contact your Account Manager or open a [Support Ticket](#) if you have any questions.

App Details



Description:

eGifter Rewards™ for Salesforce was designed to help drive business with rewards people want. Finding creative ways to engage customers and prospects is a never-ending challenge. eGifter Rewards makes it easy to send gift cards directly via email. To get started: Download the app, fund your account, and start sending gift cards immediately directly from Salesforce. You focus on engaging people; we'll provide a delightful reward experience.

Key Benefits

1. Integrated e-gift card selection within Salesforce with personalized delivery experience
2. Choose from over 300 top gift card brands and Visa® eReward
3. Track of gift delivery and claim status directly within Salesforce
4. Comprehensive reporting and business intelligence tools help to manage your budget, spot trends and optimize reward programs with actionable metrics

Set-Up Instructions

1. Download the app.
2. Register for a free eGifter Rewards account [here](#).
3. Once your account is approved, you can login to the eGifter Rewards Portal to get access to the API keys needed to set up your app.

GETTING STARTED

Setting Up Your eGifter Account

Please follow these steps to set up your account:

Step 1: Register at [Register.eGifterRewards.com](https://register.eGifterRewards.com)

Choose Salesforce AppExchange under "How did you hear about us?"

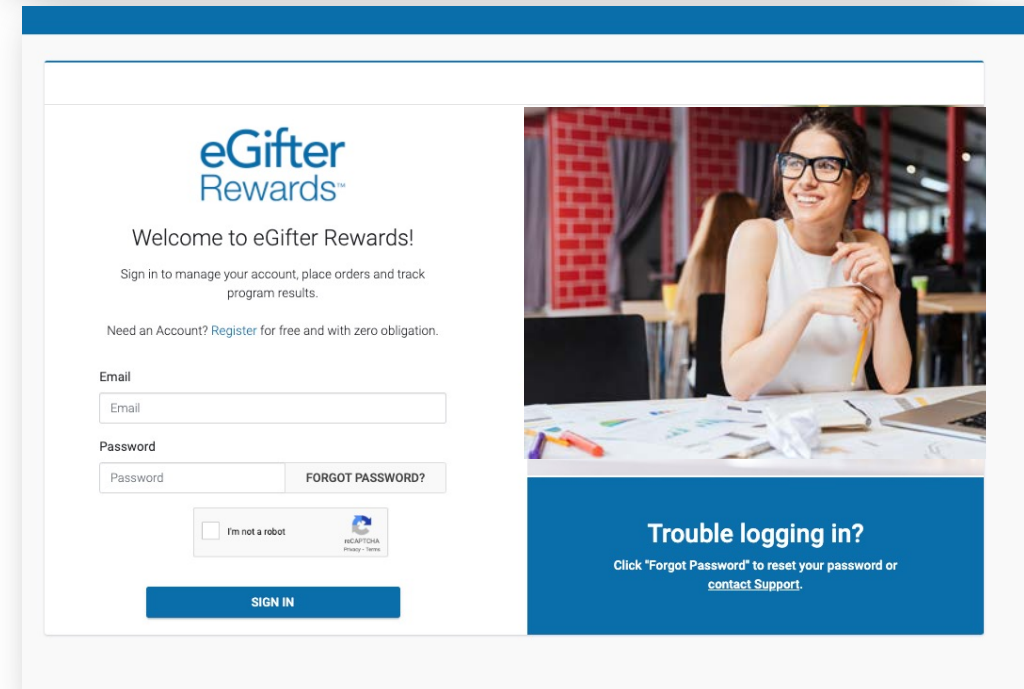
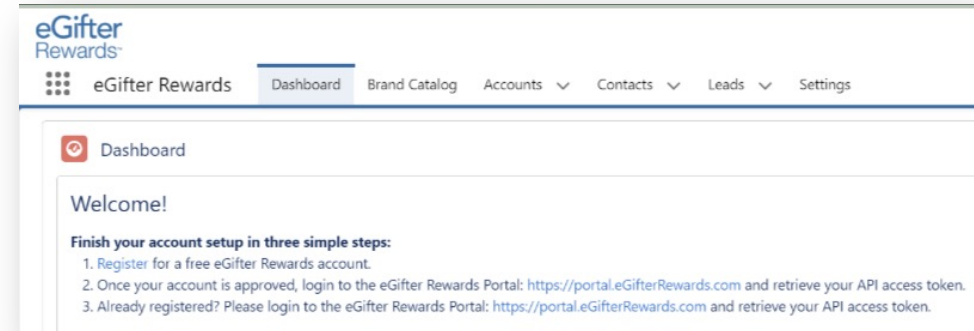
Step 2: Set Your Password

An eGifter Rewards Client Success Manager will contact you about your account setup. You will receive an email notification that your account has been approved. Please follow the instructions from this email to set your password and activate your account.

Note that the link in this email has an expiration. If it has expired, go to <https://portal.eGifterRewards.com> and use the Forgot Password button.

Step 2: Login

The login page is located at <https://portal.eGifterRewards.com>. Please be sure to bookmark this address for future use!



API SETUP

- 1 Once logged in to the Portal, click on your name in the top right corner.
- 2 Click Set Access Token.
- 3 Copy the Access Token. When you save, your access token will be set. You will not be able to access it again from this page. You will, however, be able to reset it to a new value at any time. Make sure you copy it and store it in a secure place before saving it.
- 4 Click Save Access Token.

The image displays two screenshots of the eGifter Rewards user interface. The top screenshot shows the 'API Access' page with a user profile dropdown menu open. The dropdown menu is labeled '1' and contains options: Profile, Security, API Setup (highlighted), and Sign out. The 'API Access' page itself has a 'Set Access Token' button labeled '2'. The bottom screenshot shows the 'API Access' page after clicking 'Set Access Token'. It displays the 'Access Token' as 'Not Yet Set' and a 'SET ACCESS TOKEN' button. Below this, there is a warning message: 'When you save, your access token will be set to the code below. You will not be able to access it again from this page. You will, however, be able to reset it to a new value at any time.' A text box contains the new access token: 'd15ch2n9rk2nc29n6cl1sn27721n1r1ntr9ds32st0n'. A 'COPY' button is next to the token, labeled '3'. At the bottom, there is a 'SAVE ACCESS TOKEN' button labeled '4'.

Account Funding

Use this page to send us a Funding Notification any time you send funds. Indicate the amount, and whether your funds are coming from a bank wire, ACH or credit card. (Your account must be pre-approved for credit card payments; contact your Account Manager.)

Please add \$25 to cover the wire transfer fee. There is no fee for ACH transactions. There is a 3.5% fee for all credit card transactions. Please include your account number on all payments.

You will not be able to place an order in Salesforce if there aren't sufficient funds in your account.

Account Funding

Account Management / \$ Account Funding

\$301,134.04

Available Balance

\$0.00

Pending Balance

New Funding Notice

Funding Method	Amount to Fund (\$)	Fee	Total
☒ ACH ☐ WIRE	Amount to Fund	\$0.00	\$0.00

Please reference Account Number BLK10311229 on your payment.
If you require an invoice or purchase order number prior to funding your account, please [contact us](#).

BANK DETAILS

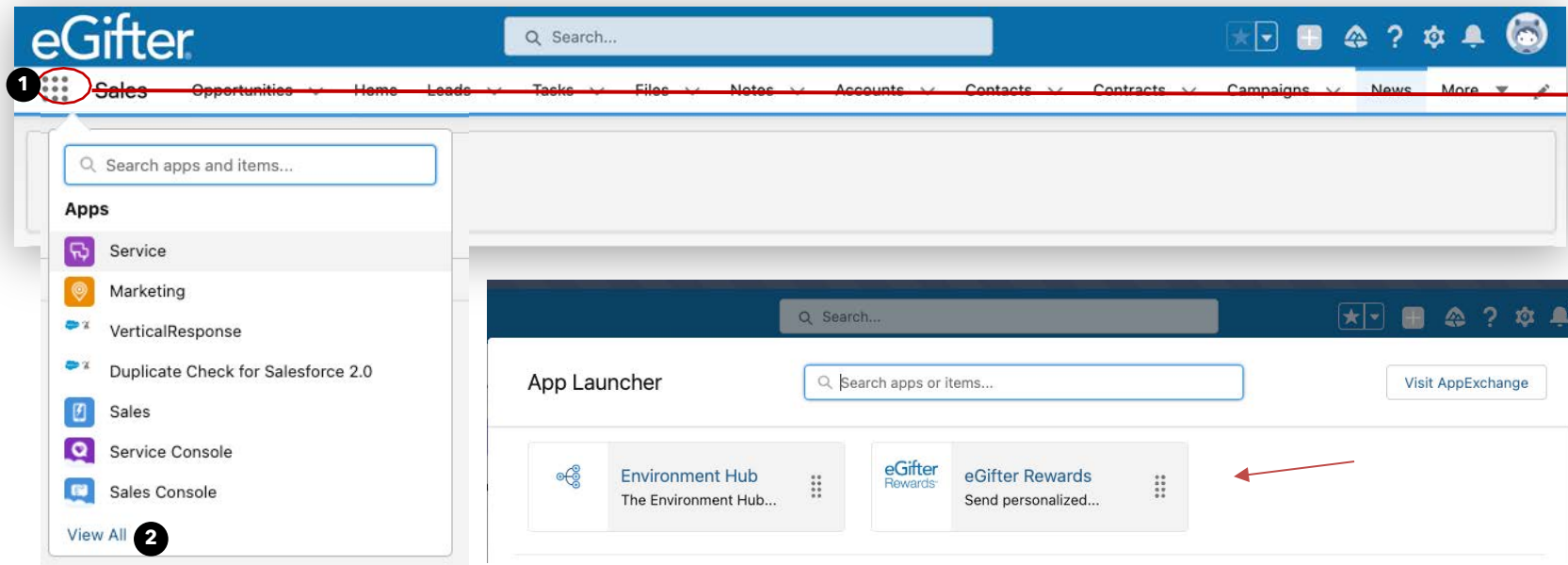
SUBMIT FUNDING REQUEST

Reminder! You must initiate a wire or ACH transfer with your bank.

Upon submitting a Funding Request, you will receive an invoice via email to use for payment processing in your organization if needed.

SET UP EGIFTER REWARDS FOR SALESFORCE

Open the AppLauncher within Salesforce.



- 1 Click the hamburger menu to open the App Launcher.
- 2 Click "View All" and select the eGifter Rewards app"

Finish setting up the connection between eGifter Rewards and Salesforce. Enter your eGifter Rewards API Email and Token Key to connect the app to your eGifter Rewards account.

- 1 Click the **Settings** tab.
- 2 Enter the required fields:
 - a. Enter API email (this is the email you use for the eGifter Rewards Portal)
 - a. Enter API token
 - b. Select sandbox or production
 - c. Set from the username, From Email address, and URL if there is any
- 3 Choose either a Sandbox or Production environment. This applies to eGifter Rewards not Salesforce. *Note: Using the production environment will result in rewards being sent using actual funds.*
- 4 Enter the API Access Token found within your eGifter Rewards account. Instructions for finding this information can be found on Page 7.



TIP!

Select a time (EST) for the eGifter Rewards gift card updater to synchronize and update the gift claim status (e.g., "Claimed" vs. "Sent") within the Salesforce Contact or Lead Activity log.

HOW TO ADD EGIFTER REWARDS TO YOUR SALESFORCE PAGE LAYOUT

USER PROFILES

After you have completed the API configuration, you will need to setup Visual Page Access so that all non-administrator users in your organization can start sending gift cards.

- 1 From Setup, navigate to Users Profiles.
- 2 Select Standard User Profile. Click "Enabled Visualforce Page Access."

- 3 Select the following Available Visualforce Pages:

- eGifter Rewards Brand Catalog
- eGifter Rewards Contact Create Order
- eGifter Rewards Contact Send Gift Order
- eGifter Rewards Lead Create Order
- eGifter Rewards Lead Send Gift Order
- eGifter Rewards eGifter Dashboard



TIP!

For Standard User Profiles, you do not need to add "eGifter Rewards Settings" to the Enabled Visualforce Pages.

- 4 Click "Add" and Save.

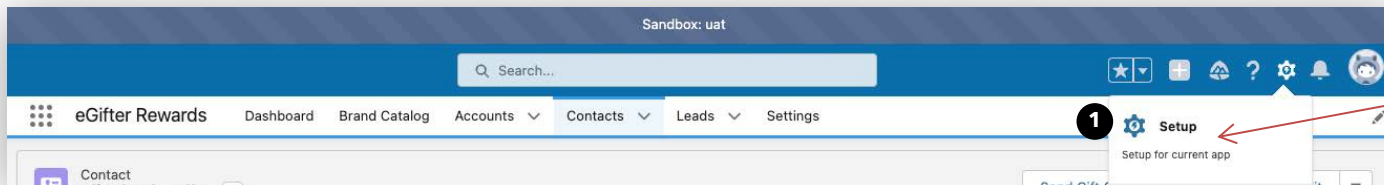
The image displays three screenshots from the Salesforce Setup interface, illustrating the steps to configure Visualforce Page Access for a Standard User Profile.

- Top Screenshot:** Shows the 'Setup' menu on the left. The 'Profiles' link under the 'Users' section is highlighted with a red box and a circled '1'.
- Middle Screenshot:** Shows the 'Standard User' profile page. The 'Enabled Visualforce Page Access' link is highlighted with a red box and a circled '2'.
- Bottom Screenshot:** Shows the 'Enable Visualforce Page Access' dialog box. The 'Available Visualforce Pages' list on the left contains the following items: Unauthorized, UnderConstruction, awduplicate2.AWDuplicatePageLayoutAccount, awduplicate2.AWDuplicatePageLayoutContact, awduplicate2.AWDuplicatePageLayoutLead, eGifterRewards.BrandCatalog, eGifterRewards.ContactCreateOrder, eGifterRewards.ContactSendGift, eGifterRewards.LeadCreateOrder, eGifterRewards.LeadSendGift, eGifterRewards.Settings, eGifterRewards.eGifterDashboard, jrsi_ul_UnsubscribeFinish, and jrsi_ul_Unsubscribe_Link. The 'Add' button is highlighted with a red box and a circled '3'. The 'Enabled Visualforce Pages' list on the right contains: ActOn.ActivityHistoryActonAjax, ActOn.activityHistory, ActOn.activityHistoryInline, ActOn.activityHistoryInlineContact, ActOn.activityHistoryInlineLead, ActOn.hotProspectsActonAjax, ActOn.hotProspectsInline, ActOn.menuActonAjax, ActOn.myActon, ActOn.trackingToggleActonAjax, awduplicate2.AWDuplicateBatch, awduplicate2.AWDuplicateBatchResults, and awduplicate2.AWDuplicateBatchResultsExport. The 'Save' button is highlighted with a red box and a circled '4'.

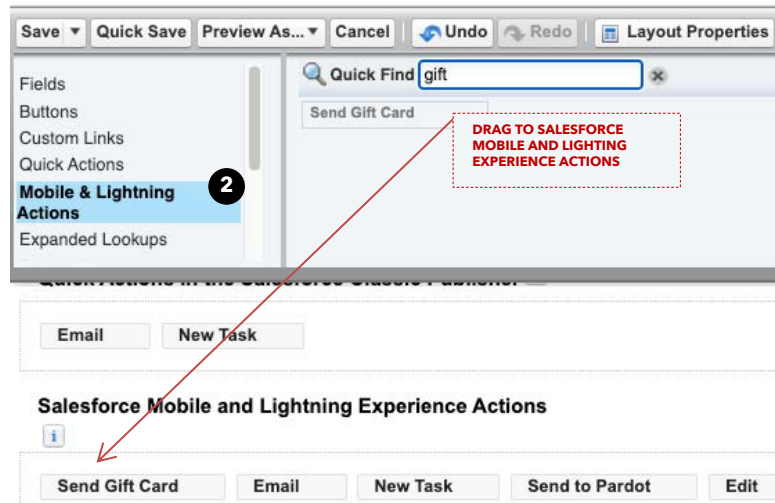
A 'SEE TIP!' callout box is present in the bottom screenshot, pointing to the 'eGifter Rewards Settings' item in the 'Available Visualforce Pages' list.

Once you've finalized your API connection, you'll need to add the eGifter Rewards for Salesforce visualforce button to either a Contact or Lead record page so your team can start sending gift cards!

Note: You'll need to add the eGifter Rewards "Send Gift Cards" button to each (e.g., Contact/Lead) Record Page Layout and List View Button Layout.

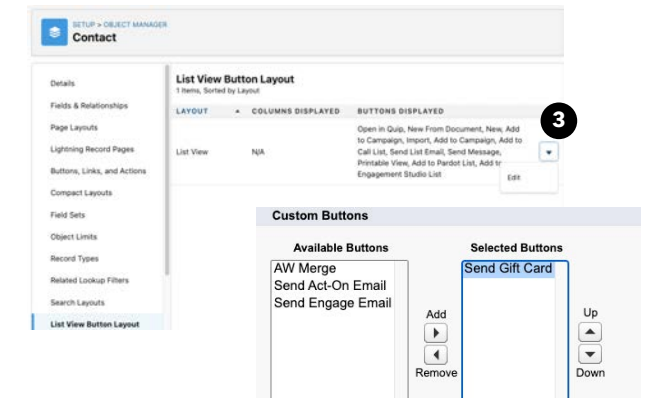


1 Click Setup from the top navigation.



2 From the Contact or Lead Layout edit the "Mobile & Lightning Actions".
a) Add Custom Button "Send Gift Card" to Page Layout
b) Click Save

3 From the Contact or Lead Object Manager edit the "List View Button Layout".
a) Add Custom Button "Send Gift Card"
b) Click Save



Next, choose where to add the Gift Card Orders to the page layout.

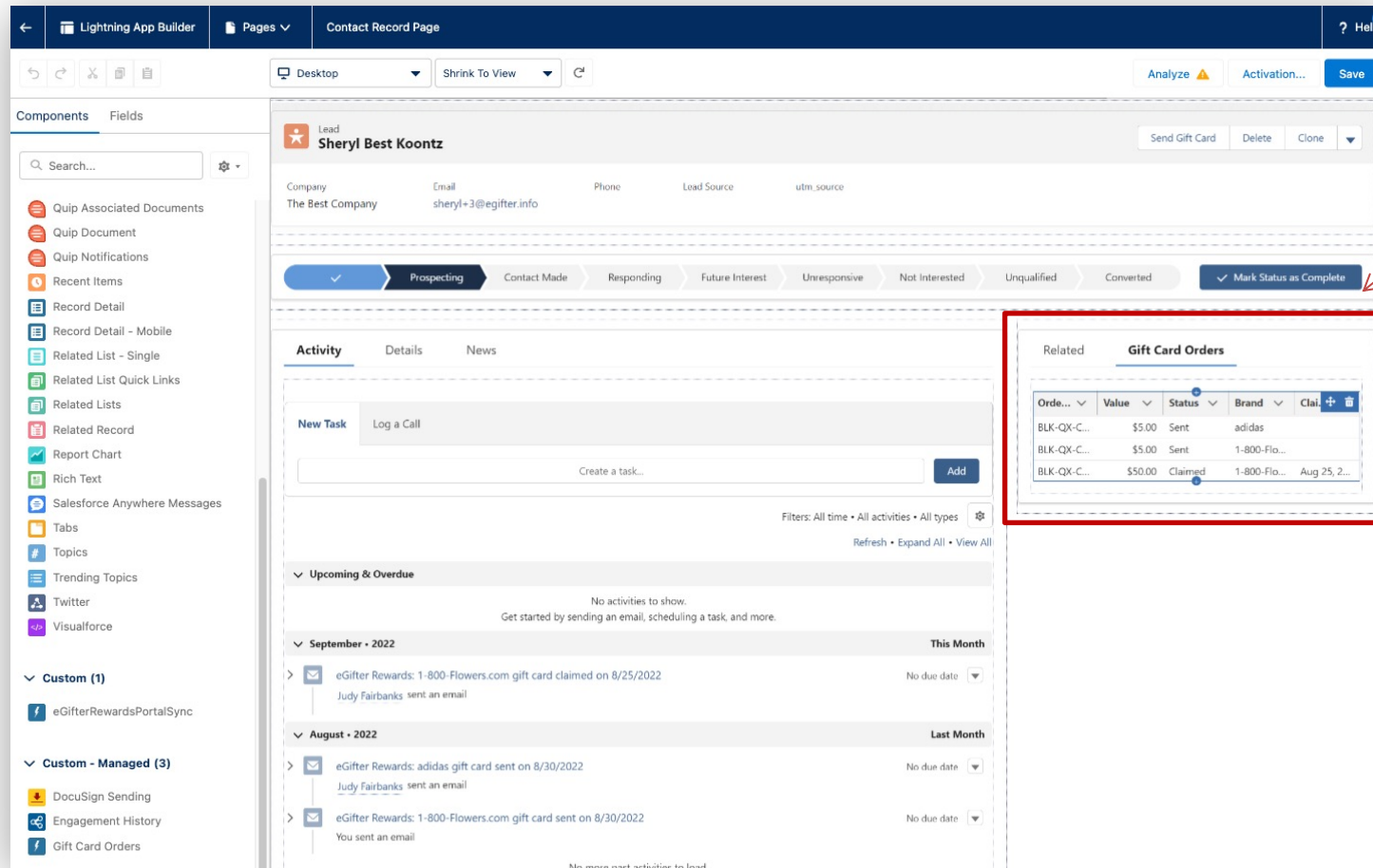
The screenshot shows the Salesforce Lightning App Builder interface for editing a 'Contact Record Page'. The left sidebar lists various components, including 'Gift Card Orders' under the 'Custom - Managed (3)' section. The central canvas displays a contact record for 'Elizabeth Adler' with fields like Name, Account Name, and Email. The right sidebar shows the 'Page > Tabs' configuration panel, which includes options for 'Default Tab', 'Tabs', 'Set Component Visibility', and 'Filters'. A red arrow points from the 'Gift Card Orders' component in the sidebar to the 'Add Tab' button in the 'Page > Tabs' panel. Another red arrow points from the 'Add Tab' button to the 'Activity' tab in the 'Page > Tabs' panel. A third red arrow points from the 'Add Tab' button to the 'Set Component Visibility' section in the 'Page > Tabs' panel.

Click "Activity" to Add Tab. Click Add Tab, Select "Custom". Label Tab "Gift Card Orders".

Grab the **eGifter Rewards Gift Card Orders** and drag to the new Tab "Gift Card Orders". This will display order history and status relevant to the lead, contact or account.

Alternatively, you can drag eGifter Rewards Gift Card Orders to any section of the page you want it to display.

Before clicking save, please review the page and make sure the Gift Card Orders module is in the desired position. Once saved, team members will be able to view eGifter Gift Orders when they log into Salesforce.



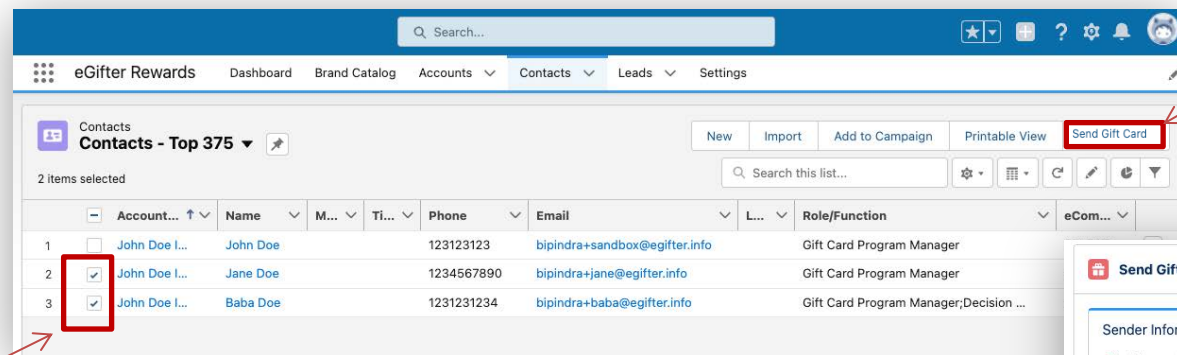
The screenshot displays the Salesforce Lightning App Builder interface for a 'Contact Record Page'. The page is titled 'Contact Record Page' and shows the details of a lead named 'Sheryl Best Koontz'. The lead's company is 'The Best Company' and their email is 'sheryl+3@egifter.info'. The page includes a sidebar with various components, including 'Gift Card Orders'. The main content area shows the lead's details and a 'Gift Card Orders' table. A red arrow points to the 'Mark Status as Complete' button, and a red box highlights the 'Gift Card Orders' table.

Orde...	Value	Status	Brand	Clai...
BLK-QX-C...	\$5.00	Sent	adidas	
BLK-QX-C...	\$5.00	Sent	1-800-Flo...	
BLK-QX-C...	\$50.00	Claimed	1-800-Flo...	Aug 25, 2...

SEND GIFT CARDS

Once Salesforce is connected to eGifter Rewards and your account is funded, you can begin sending gift cards. We'll take you through sending gift cards within Salesforce.

Choose the Contacts or Leads to whom you want to send a gift card—click Send Gift Card button.



Additional Notes:

Available gift card brands are based on what is loaded into your eGifter Rewards catalog.

If multiple Contacts or Leads were selected, they will display within "Recipients", as the User is selecting one Gift Card brand for all Recipients.

The 'Send Gift Cards' modal window is shown. It includes a 'Sender Information' section with fields for 'First Name or Company - Included in Gift to Recipient', 'Last Name - Optional', and 'Email'. Below this is a 'Choose a Gift Card for all Recipients' section featuring a 'Gift Card' image and a 'Select Card' button. At the bottom is a 'Recipients' section with a table listing recipients and their details.

	First Name	Last Name	Phone	Email	Card	Value	Delivery Date	Message
1	Jane	Doe	(123) 456-78...	bipindra+j...				
2	Jane	Doe		bipindra+j...				

SEND A GIFT CARD

- 1 Complete all fields on the screen.
- 2 Click "Select Card" to choose a Gift Card for all Recipients.
- 3 Enter the Gift Card Value, Delivery Date and include a personal message.
- 4 Click "Add To Cart" when ready.



TIP!

To send your gift cards from an alias, such as "The Management Team", enter it in the "Sender First Name or Company" field and leave the "Sender Last Name" field blank.

Send Gift Cards Add To Cart

Sender Information SEE TIP!

* First Name or Company - Included in Gift to Recipient: Elizabeth
 Last Name - Optional: Adler
 Email: elizabeth@egifter.com

Choose a Gift Card for all Recipients

Select Card and Enter Recipient Details

Name	Available Denomination	Fee	Discount %
1-800-Flowers.com	\$5 - \$500	\$0.95	0%
1-800-PetSupplies	\$25 - \$50	\$0.95	0%
Ninety Nine Restaurant & Pub	\$5 - \$500	\$0.95	0%
Abercrombie & Fitch	\$5 - \$500	\$0.95	0%
Ace Hardware	\$5 - \$250	\$0.95	0%

Recipients

	First Name	Last Name	Phone
1	Jane	Doe	(123) 456-78...
2	Jane	Doe	

Choose a Gift Card for all Recipients

Ninety Nine 99 RESTAURANT & PUB

Enter Gift Card Value - \$5-\$500: 5
 Delivery Date - Leave blank to send today:
 Personalize your gift card with a message - Optional:
 Maximum 500 characters

SEE TIP!



TIP!

The Message to Recipient has a max limit of 500 characters.

To send a gift card to one (1) Contact or Lead, navigate to the Contact/Lead Page and click "Send Gift Card". Follow the steps from Page 19.

The screenshot displays the eGifter Rewards interface for a contact named Jane Doe. The top navigation bar includes links for Dashboard, Brand Catalog, Accounts, Contacts, Leads, and Settings. The 'Contacts' tab is active, and the contact details for Jane Doe are shown. A red box highlights the 'Send Gift Card' button, with a red arrow pointing to it. The interface is divided into two main sections: 'Details' on the left and 'Activity' on the right. The 'Details' section includes fields for Contact Owner (Elizabeth Adler), Name (Jane Doe), Account Name (Testing Lead Trigger), Title, Role/Function (Gift Card Program Manager), Email (bipindra+jane2@egifter.info), Phone, Mobile, No Longer With Company (checkbox), and Status. The 'Activity' section shows 'Gift Card Orders' and a 'New Task' form. It also displays filters for 'All time', 'All activities', and 'All types', along with a 'Refresh' button. The 'Upcoming & Overdue' section shows 'No activities to show.' and a message to 'Get started by sending an email, scheduling a task, and more.' The 'August 2022' section shows 'This Month' with a list of activities, including 'eGifter Rewards' with the note 'You sent an email' and 'No due date'. The bottom section shows 'Address Information' with fields for 'Mailing Address' and 'Other Address'.

CART & CHECKOUT

- 1 Review your Cart Summary.
- 2 Add an eGreeting Card. There are dozens of holidays and occasions from which to choose!
- 3 Enter internal information including PO Number (optional), Internal Reference note (optional), and Department (if available to you). These inputs do not display to the gift recipient.
- 4 Confirm Payment Information.
- 5 Place Order.

Note: Departments must be configured in your account in the eGifter Rewards Portal. Contact your Account Manager or open a support ticket at <https://help.egifter.com>.

The image shows two screenshots of the eGifter Rewards interface. The top screenshot shows the 'Cart' page with a 'Cart Items' section containing a Dunkin' item for \$4.92. The 'Cart Total' is \$4.92. The bottom screenshot shows the 'Checkout' page with a 'Cart Summary' table, a 'Greeting Card' selection area, 'Internal Order Information' fields, and a 'Payment Information' section.

Cart Items

#	Name	Quantity	SubTotal	Discount	Fee	Total
1	Dunkin'®	1	\$5.00	2%	\$0.00	\$4.92
Total			\$5.00			\$4.92

Cart Total
1 item(s) \$4.92

Recipient: Jane Doe
Recipient email: bipindra+jane2@egifter.info
Message: Enjoy!
Delivery date: Today

TIP!
PO Number is a searchable field with the eGifter Rewards Portal which can help you locate this order in the future if you use it. If you don't use PO numbers, you can use keywords to help identify the order, e.g., "Spring Gift Card Campaign" or "Spot Rewards January."

Cart Summary

#	Name	Quantity	Delivery	SubTotal	Discount	Fee	Total
1	Dunkin'®	1	Recipient: Jane Doe Recipient Email: bipindra+jane@egifter.info	\$5.00	2%	\$0.00	\$4.92
Total				\$5.00			\$4.92

Greeting Card (2)

Internal Order Information (3)

PO Number:

Internal Reference Note:

* Department (4):

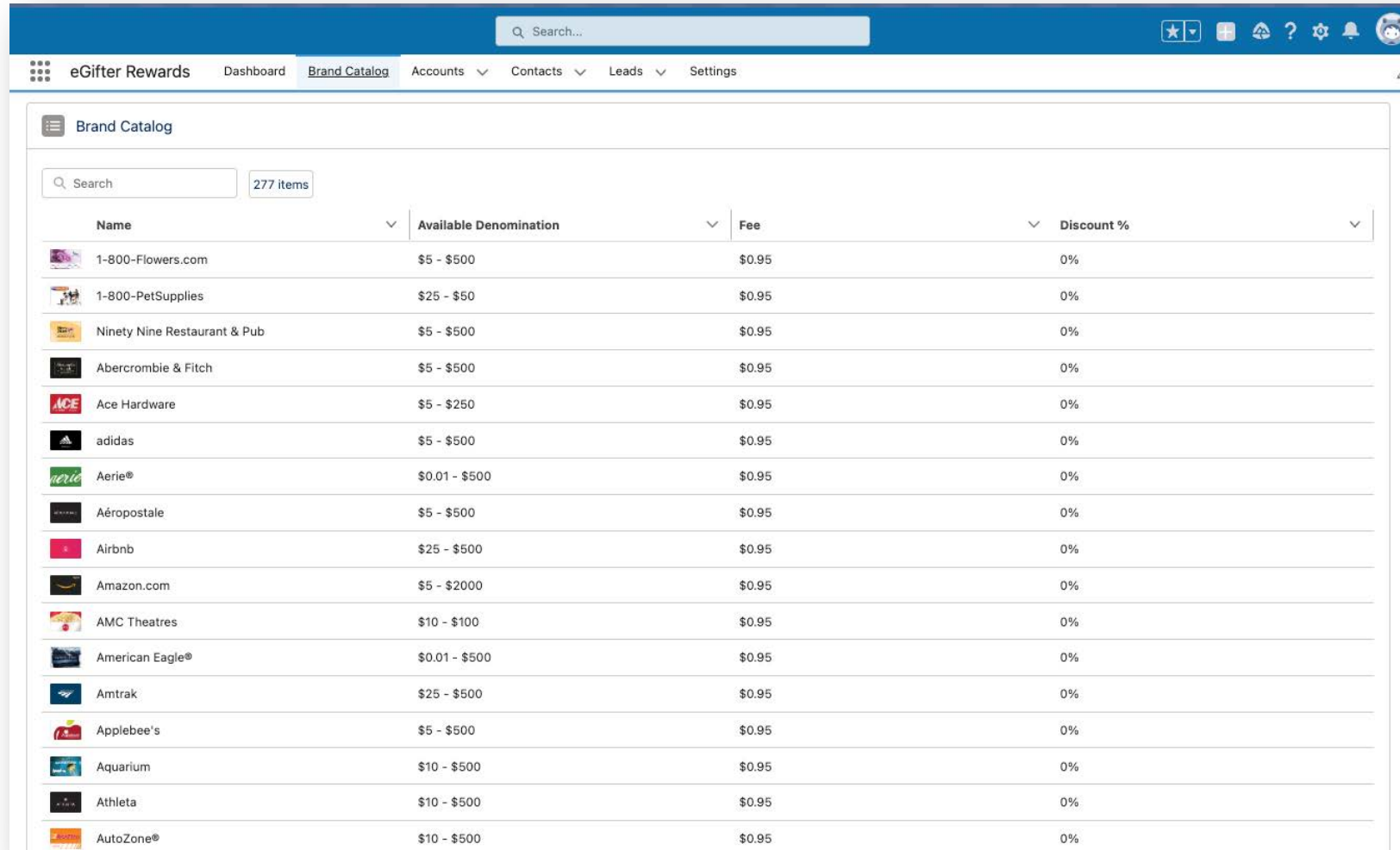
Payment Information

Account Balance:

Place Order (5)

ADDITIONAL TOOLS

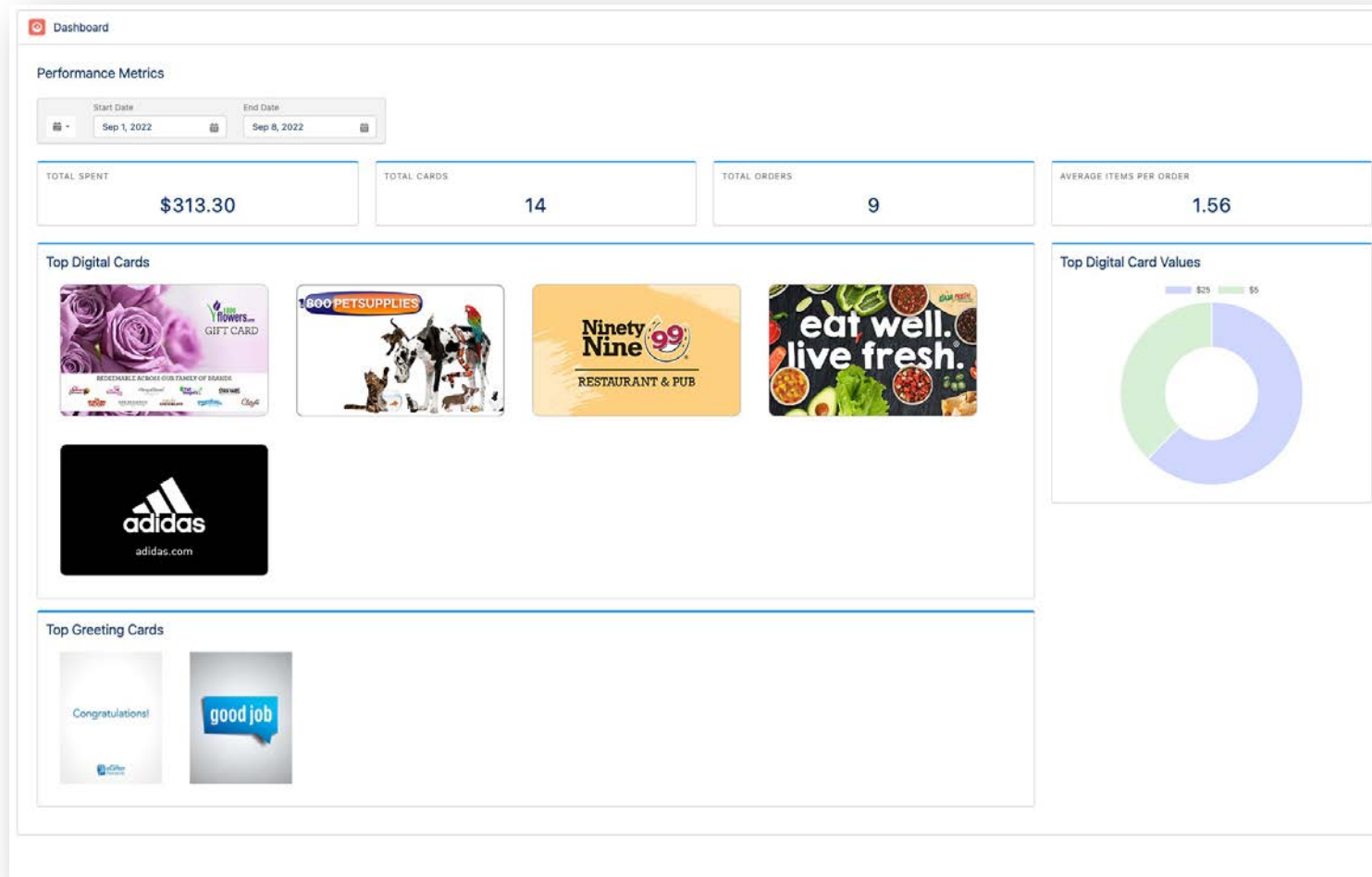
View the Brand Catalog tab to view all the gift card brands available for your account.



The screenshot shows the eGifter Rewards interface with the 'Brand Catalog' tab selected. The interface includes a search bar at the top with '277 items' and a table listing various gift card brands. The table has four columns: Name, Available Denomination, Fee, and Discount %.

Name	Available Denomination	Fee	Discount %
1-800-Flowers.com	\$5 - \$500	\$0.95	0%
1-800-PetSupplies	\$25 - \$50	\$0.95	0%
Ninety Nine Restaurant & Pub	\$5 - \$500	\$0.95	0%
Abercrombie & Fitch	\$5 - \$500	\$0.95	0%
Ace Hardware	\$5 - \$250	\$0.95	0%
adidas	\$5 - \$500	\$0.95	0%
Aerie®	\$0.01 - \$500	\$0.95	0%
Aéropostale	\$5 - \$500	\$0.95	0%
Airbnb	\$25 - \$500	\$0.95	0%
Amazon.com	\$5 - \$2000	\$0.95	0%
AMC Theatres	\$10 - \$100	\$0.95	0%
American Eagle®	\$0.01 - \$500	\$0.95	0%
Amtrak	\$25 - \$500	\$0.95	0%
Applebee's	\$5 - \$500	\$0.95	0%
Aquarium	\$10 - \$500	\$0.95	0%
Athleta	\$10 - \$500	\$0.95	0%
AutoZone®	\$10 - \$500	\$0.95	0%

View the Dashboard for Business Intelligence and real-time data to help you to optimize the program.



At any point, you can view the **Order History** of any past gift cards sent through Salesforce, including order details, gift card brand, amount and recipient, date sent, and delivery status—all without logging out of Salesforce.

The screenshot displays the eGifter Rewards interface within a Salesforce environment. The top navigation bar includes links for Dashboard, Brand Catalog, Accounts, Contacts, Leads, and Settings. The main header shows the contact name 'Jane Doe' with a profile icon and buttons for 'Send Gift Card', 'Printable View', and 'Clone'. Below this, a summary row lists fields: Title (Testing Lead Trigger), Account Name (Testing Lead Trigger), Phone (2), Email (bipindra+jane2@egifter.info), and Contact Owner (Elizabeth Adler).

The left sidebar contains tabs for Details, Related, and News. The 'Details' tab is active, showing a form with the following fields: Contact Owner (Elizabeth Adler), Name (Jane Doe), Account Name (Testing Lead Trigger), Title, Role/Function (Gift Card Program Manager), Email (bipindra+jane2@egifter.info), Phone, Mobile, No Longer With Company (checkbox), Status, and Address Information (Mailing Address and Other Address).

The right sidebar features an 'Activity' section titled 'Gift Card Orders'. It contains a table with columns: Order Id, Value, Status, Brand, and Claim D... The table lists several orders, all with a status of 'Claimed' or 'Sent'. Below the table are filters (All time, All activities, All types), a settings icon, and links for Refresh, Expand All, and View All. Further down, there is a section for 'Upcoming & Overdue' activities, which currently shows 'No activities to show.' and a prompt to get started by sending an email, scheduling a task, or more. Below this, a calendar view for September 2022 shows two upcoming activities: 'eGifter Rewards: adi...' and 'eGifter Rewards: Ski...', both with 'No due date' and a dropdown arrow.

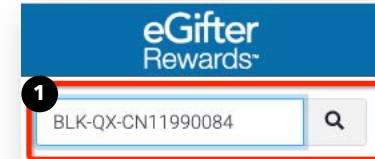
A Custom “Gift Card Orders” tab will be added to track all Rewards sent by each User and for an Account, Contact or Lead Record.

SERVICING ORDERS

Servicing Gift Card Orders from the eGifter Rewards Portal

If necessary, eGifter Rewards Portal users can service a Gift Card Order by copying the Order Number (e.g., BLK-QX-CN11990084) from Salesforce and logging into eGifter Rewards.

- 1 Add the Order Number into Quick Search (e.g., BLKQXCN11990084) and click the Search button.
- 2 The Service Order Page will appear. Here you can see various details about the order and initiate a Gift Card Resend if necessary.



Service Order **2** Order Management / Service Order

Direct Delivery Order OCN11990088 / Alt. Order BLK-QX-CN11990084 Date: 08/22/2022 01:00 PM EDT [PRINT RECEIPT](#)

Company: eGifter Api (BLK10307111)
Purchaser Name: [Bipin Shrestha](#)
Purchaser Email: bipindra@egifter.info
Billing Address:
eGifter Api
Bipin Shrestha
Department: test1
Payment Type: Deposit Account
Login Method:
IP Address: 13.110.74.8

Total Quantity: 1
Total Value: \$1.00
Claimed Quantity: 1
[CARD SUMMARY REPORT](#)

Order Number: OCN11990088
Bulk Order Number: BLK-QX-CN11990084
PO Number: BLK44CBDB
Currency: USD
Country: United States
Order Status: Complete
Payment Status: Complete
Fraud Status: N/A
Date: 08/22/2022 01:00 PM EDT
Date Processed: 08/22/2022 12:59 PM EDT
Marketing Email: No

Show entries Search: [CSV](#) [XLSX](#)

	Value	Quantity	Name	Delivery	Status	Total Value	Total Cost	
	\$1.00	1	Amazon.com	Recipient: Amazon.com Recipient Email: bipindra+activitytest@egifter.info Recipient ID: 003020000F1Tx9AAF Requested Delivery Date: Immediately Actual Delivery Date: 08/22/2022 01:00 PM EDT Delivery Method: Email Sender: Bipindra Shrestha Personalization	Claimed Claim Date: 08/22/2022 01:01 PM EDT DETAILS	\$1.00	\$0.98	RESEND RESEND HISTORY

Gift Card numbers

ENGAGE SUPPORT

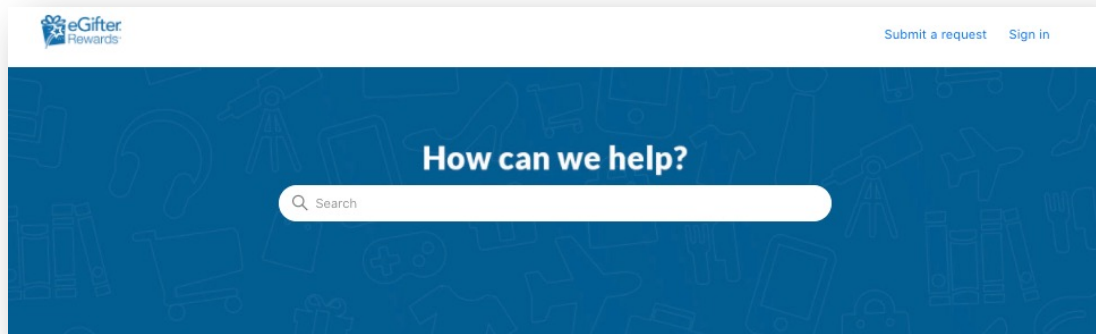
Support Hours:

9:00 am – 9:00 pm EST, 7 days/week

Navigate to help.egifter.com to submit a support ticket via a brief web form.

The eGifter Rewards team actively views and responds to requests during support hours. Outside of support hours, the system is monitored for time sensitive issues. Time sensitive issues are addressed on a case by cases basis, depending on the severity.

At any time, view the status of your ticket at the eGifter Rewards Help Center: help.egifter.com



REMINDER! You are responsible for providing support to your gift card recipients. If there is a specific gift card issue your internal team needs assistance with, they can escalate it to us by opening a support ticket. We will work with your team to resolve it and you can then close out the issue with your recipient. Please do not give eGifter support information directly to your recipients unless explicitly approved.



Thank you for choosing eGifter Rewards for Salesforce!

We value you as a customer and appreciate your business.

We want to hear from you! Leave your feedback at [TrustPilot.com/review/egifterrewards.com](https://www.trustpilot.com/review/egifterrewards.com)

For the latest from eGifter Rewards, visit our blog: <https://egifterrewards.com/rewarding-times/>