Online Campaign Setup

CREATING ONLINE CAMPAIGNS FOR USER REIMBURSEMENT

What is this Tool?

- An online payment platform that is integrated into the Company's payment portal for the Customer's users.

- Allows the portal to send payments to users that complete tasks at designated points in their activities.

- Can be used to maintain payments for multiple campaigns and tasks within each campaign to ensure seamless payment transactions.
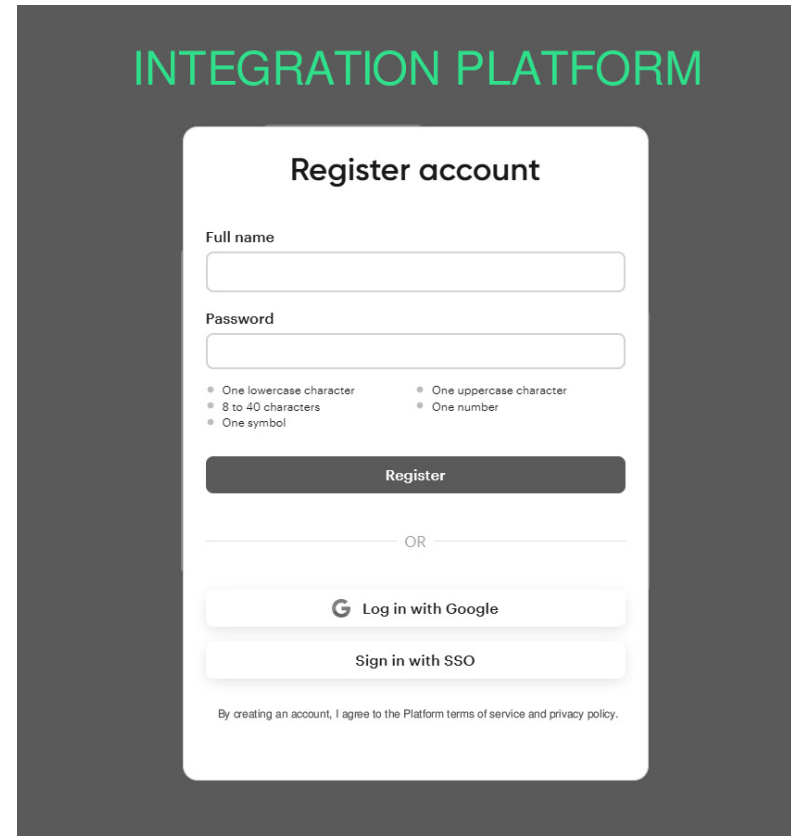
Creating a New Account

Contact the product manager for access to the Tool's "Company Name" account. Provide your company email address to associate with your new account.

Click "Join team" in your email invite.
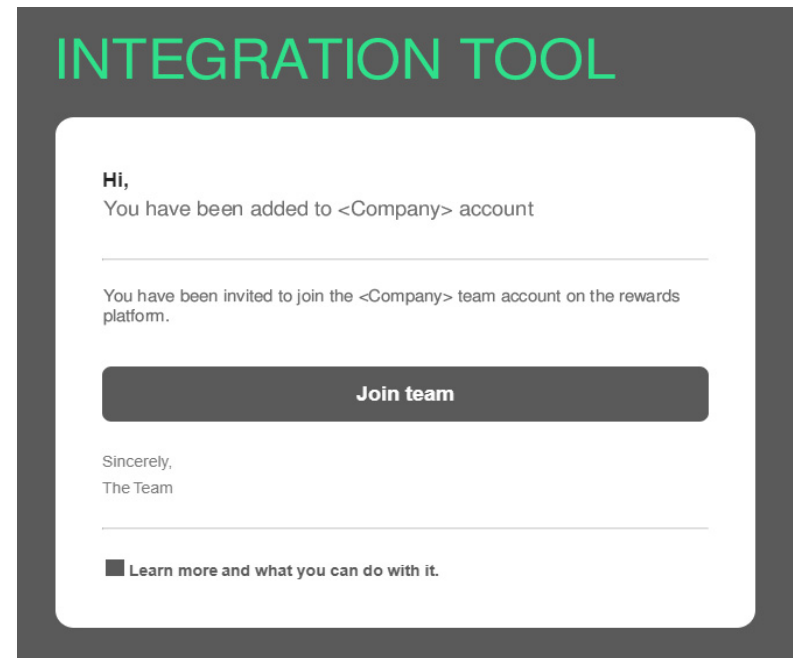
Creating a New Account

In the "Register account" page, provide your full name and password. Click "Register."
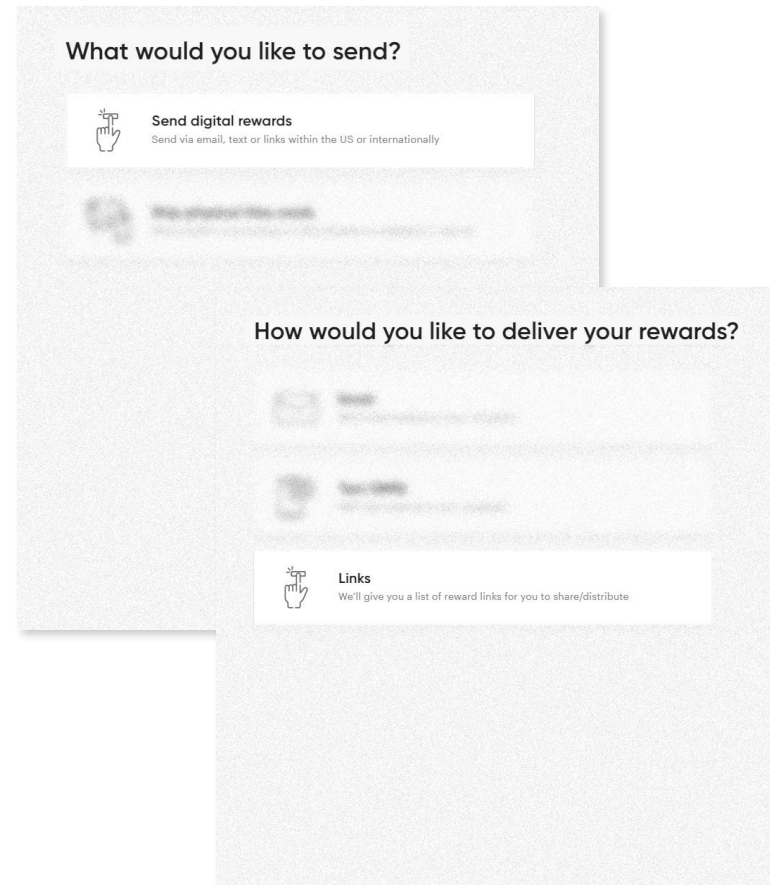
Creating a New Campaign

After logging in, select the "Send Rewards" button.

In the "What would you like to send?" page, select "Send digital rewards."

In the "How would you like to deliver your rewards?" page, select "Links."

In the "Choose a campaign template" page, select "Create."

Creating a New Campaign

Select payment options to be available to the User. Refer to the service contract to verify that the selected payment options are as confirmed by the Customer.

Select "Preview" to view a test page showing the selected payment options.

Close the preview window if open.

Select "Continue."

Creating a New Campaign

In the "Design your rewards" page, select "Edit your webpage."

In the "Edit your webpage" page, upload the Customer logo. If needed, contact the Company graphic designer for the correct logo.

Adjust logo size to 50px.
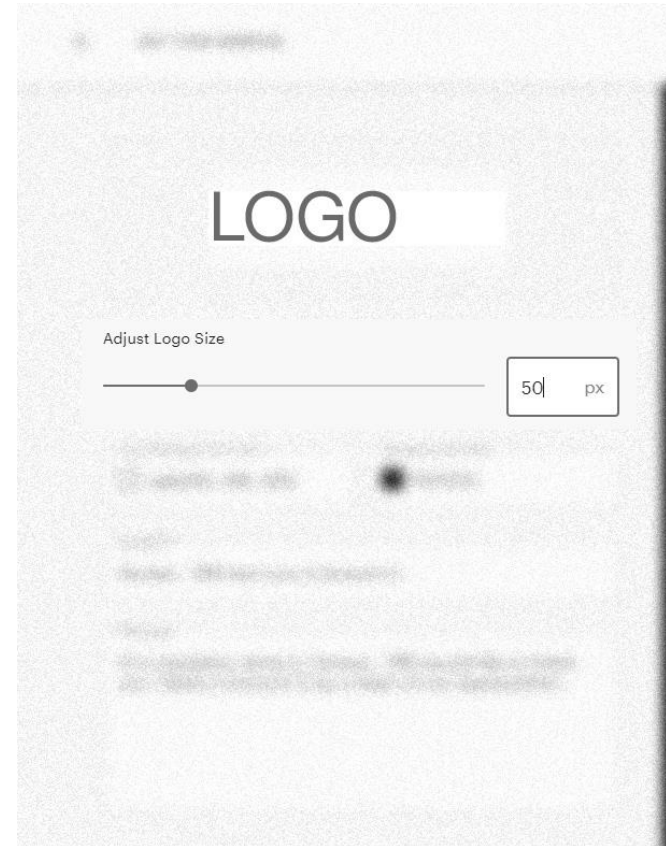
Creating a New Campaign

Click on the "Logo Color" text field and enter, "ECECEC," in the "Hex" text field.

◦ You can change this color later to match Customer branding if needed.

In the "Background Color" text field and enter, "4AC2E2," in the "Hex" text field.

◦ You can change this color later to match Customer branding if needed.

Creating a New Campaign

In the Headline text field, replace "Company_Name" with the Customer name. Refer to the service contract to verify that the Customer name is correct.

Copy and paste the following text into the "Message" text box:
Hi {{ recipient_name }}, Customer_Name would like to thank you for participating in the task related to Activity_Name. Here's {{ amount }} as a token of our appreciation.
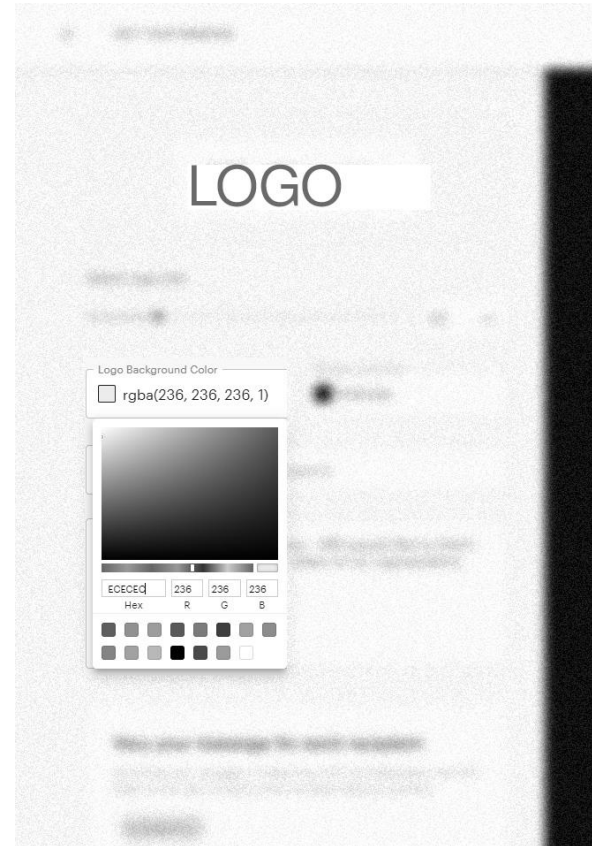
Replace "Customer_Name" in the Message text box with the Customer name and "Activity_Name" with the name of the activity.

Click "Save" to save your Campaign template and return to the "Design your rewards" page.

Click "Continue" to be taken into the email customization page.

Customize your email

In the "Sender Name" text field, replace "Company_Name" with the Customer name. Refer to the service contract to verify that the Customer name is correct.

In the "Email Subject Line" text field, replace "Company_Name" with the Customer name. Refer to the service contract to verify that the Customer name is correct.

Copy and paste the following text into the "Message" text box:

Hi {{ recipient_name }}, Customer_Name would like to thank you for participating in the task related to Activity_Name. Here's {{ amount }} as a token of our appreciation.

Replace "Customer_Name" in the Message text box with the Customer name and "Activity_Name" with the name of the activity.

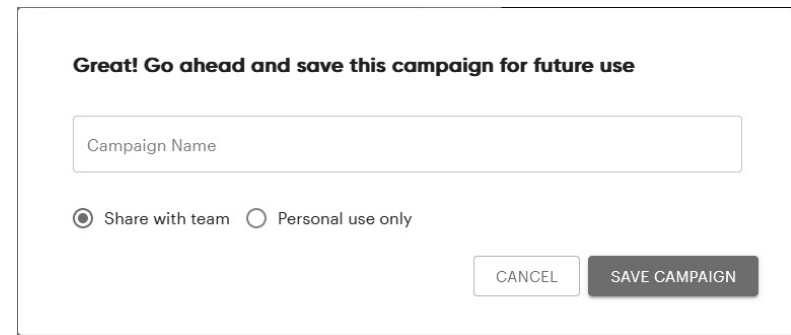Select "Done."

Customize your email

A pop-up window will appear offering to save the Campaign as a template.

In the "Campaign name" text field, enter a name for the Campaign.

Select "Share with the team."

Select "Save Campaign."

Your campaign will be saved and you will be taken to the "Choose a template" page.

Great! Go ahead and save this campaign for future use

Campaign Name

◉ Share with team   ○ Personal use only

CANCEL   SAVE CAMPAIGN