

# Online Campaign Setup

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CREATING ONLINE CAMPAIGNS FOR USER  
REIMBURSEMENT

# What is this Tool?

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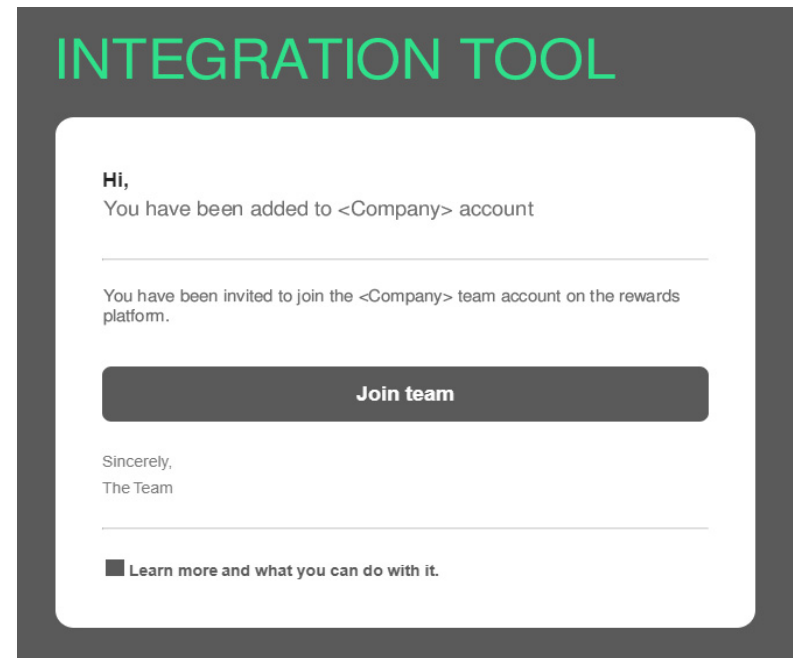
- An online payment platform that is integrated into the Company's payment portal for the Customer's users.
- Allows the portal to send payments to users that complete tasks at designated points in their activities.
- Can be used to maintain payments for multiple campaigns and tasks within each campaign to ensure seamless payment transactions.

# Creating a New Account

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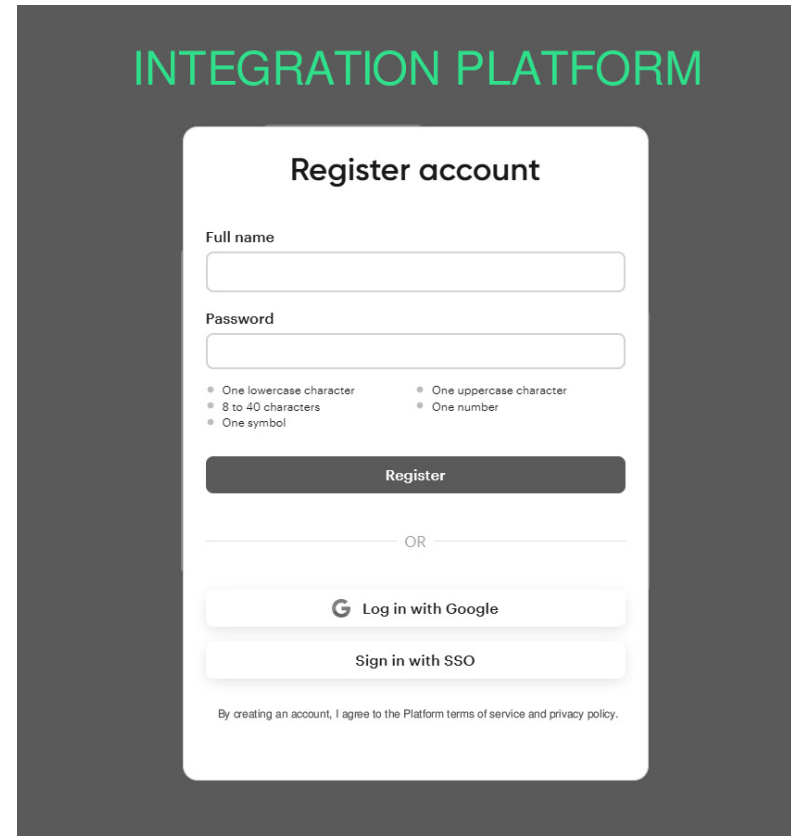
Contact the product manager for access to the Tool's "Company Name" account. Provide your company email address to associate with your new account.

Click "Join team" in your email invite.



# Creating a New Account

In the “Register account” page, provide your full name and password. Click “Register.”



The screenshot shows a registration form titled "Register account" on a dark grey background. At the top, the text "INTEGRATION PLATFORM" is displayed in green. The form itself is white and contains the following elements:

- Full name:** A text input field.
- Password:** A text input field.
- Password requirements:** A list of four requirements:
  - One lowercase character
  - One uppercase character
  - 8 to 40 characters
  - One number
  - One symbol
- Register:** A dark grey button with white text.
- OR:** A horizontal line with the text "OR" centered above it.
- Log in with Google:** A button with the Google logo and text.
- Sign in with SSO:** A button with text.
- Disclaimer:** A small line of text at the bottom: "By creating an account, I agree to the Platform terms of service and privacy policy."

# Creating a New Campaign

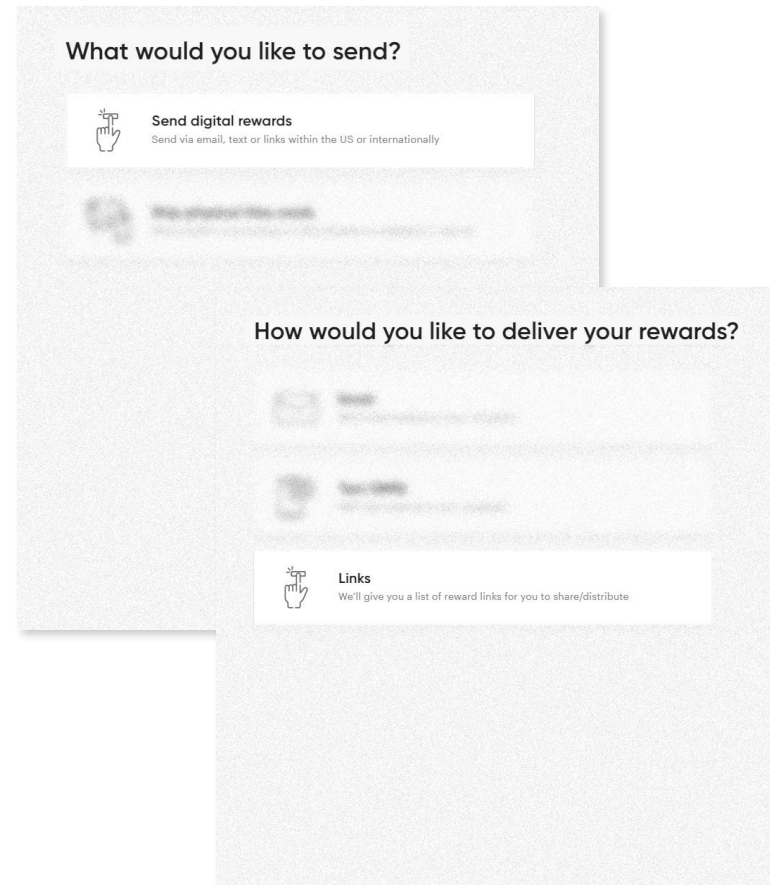
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After logging in, select the “Send Rewards” button.

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.”

Select the reward(s) you'd like to make available to recipients

Q Amazon, Japan, PayPal, Starbucks... Locations Currency Denominations

840 Results Unselect All Select

<input type="checkbox"/>	 <b>Prepaid Cards (3)</b>	211 Regions	USD	Varied
<input type="checkbox"/>	 Physical Visa	United States	USD	\$1.00 - \$1,000.00
<input type="checkbox"/>	 Virtual Visa	United States	USD	\$0.01 - \$1,000.00
<input type="checkbox"/>	 Virtual Visa International	210 Regions	USD	\$0.01 - \$1,000.00
<input type="checkbox"/>	 <b>Gift Cards (798)</b>	41 Regions	Varied	Varied
<input type="checkbox"/>	 Amazon.com	United States	USD	\$0.01 - \$2,000.00
<input type="checkbox"/>	 Starbucks US	United States	USD	\$5.00 - \$500.00
<a href="#">View 796 more</a>				
<input type="checkbox"/>	 <b>Charity Donations (39)</b>	216 Regions	USD	Varied
<input type="checkbox"/>	 <b>PayPal</b> Request Access	223 Regions	USD	Varied
<input type="checkbox"/>	 <b>Bank Transfer</b> Request Access	United States	USD	Varied

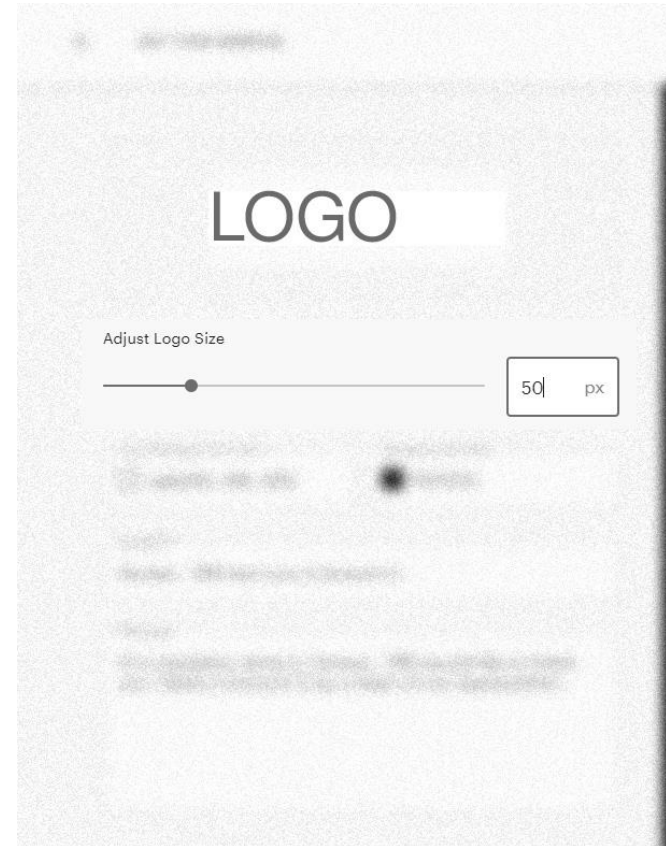
# Creating a New Campaign

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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

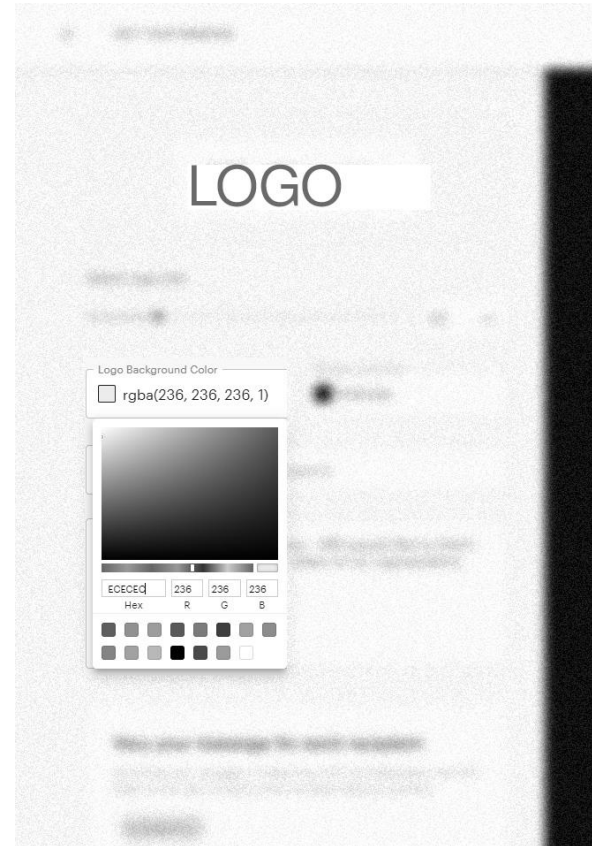
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Click on the “Logo Color” text field and enter, “ECECEC,” in the “Hex” text field.

- 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

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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

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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

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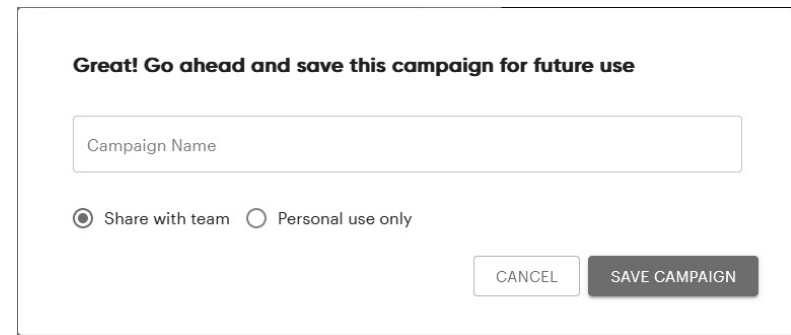
A pop-up window will appear offering to save the Campaign as a template.

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.



A screenshot of a dialog box with a white background and a thin grey border. At the top, it says "Great! Go ahead and save this campaign for future use" in bold. Below that is a text input field with the placeholder "Campaign Name". Underneath the field are two radio button options: "Share with team" (which is selected) and "Personal use only". At the bottom right, there are two buttons: a white "CANCEL" button and a dark grey "SAVE CAMPAIGN" button.