REWARDS GENIUS™ + qualtrics

Qualtrics Incentives Set-Up Guide

Getting Started

What Is Rewards Genius?

Rewards Genius is a self-serve portal that hosts your Qualtrics incentive integration, making it possible to automatically send a Reward Link to recipients upon survey completion. Rewards Genius is powered by Tango Card®.

What Happens First?

You will need to review and accept Tango Card's Enterprise Terms of Service. Once completed, we will send you an invitation to Rewards Genius. When you receive the invitation, you'll set up your Rewards Genius portal, fund your account and create an email template.

What's Covered Here?

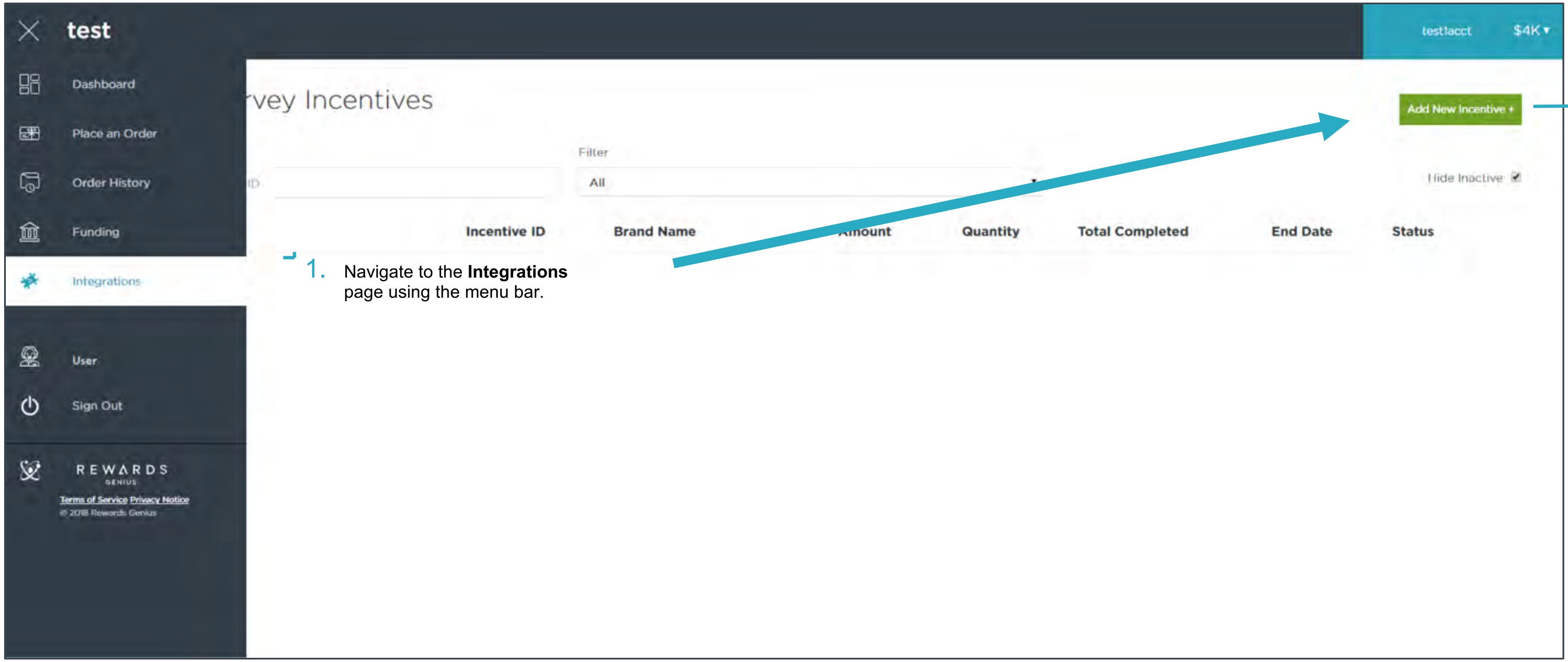
This guide walks you through how to finish setting up your Qualtrics and Rewards Genius integration by:

- Creating and managing an incentive in Rewards Genius
- Building a task in Qualtrics to deliver the incentive

Step 1: Create an Incentive in Rewards Genius

Rewards Genius

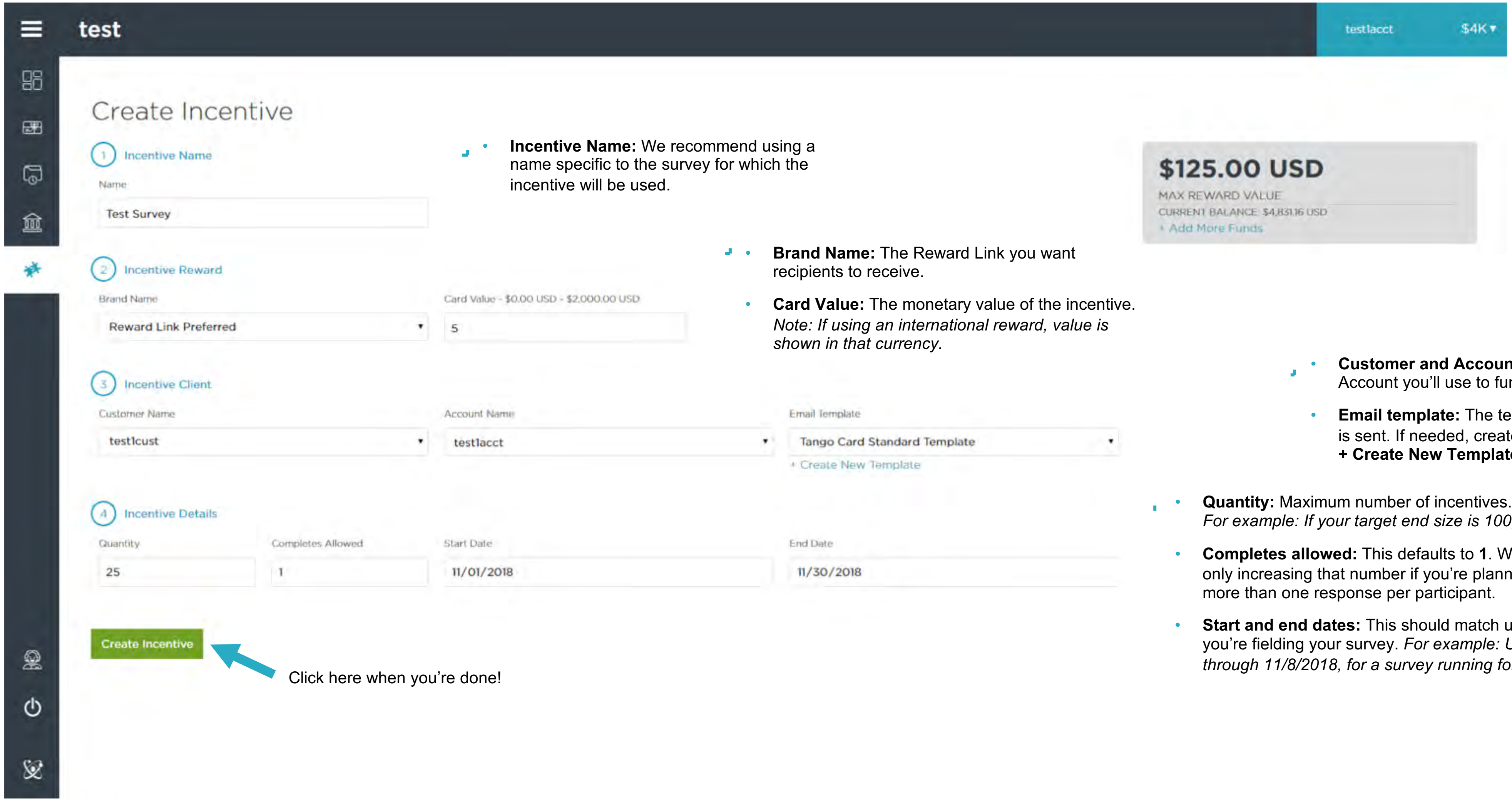
Get started by navigating to the **Integrations** page in your Rewards Genius portal.



2. Click **Add New Incentive +**.

Rewards Genius

Then, give us some specifics about the incentive you’re creating (all fields required).



- **Incentive Name:** We recommend using a name specific to the survey for which the incentive will be used.

- **Brand Name:** The Reward Link you want recipients to receive.
- **Card Value:** The monetary value of the incentive. *Note: If using an international reward, value is shown in that currency.*

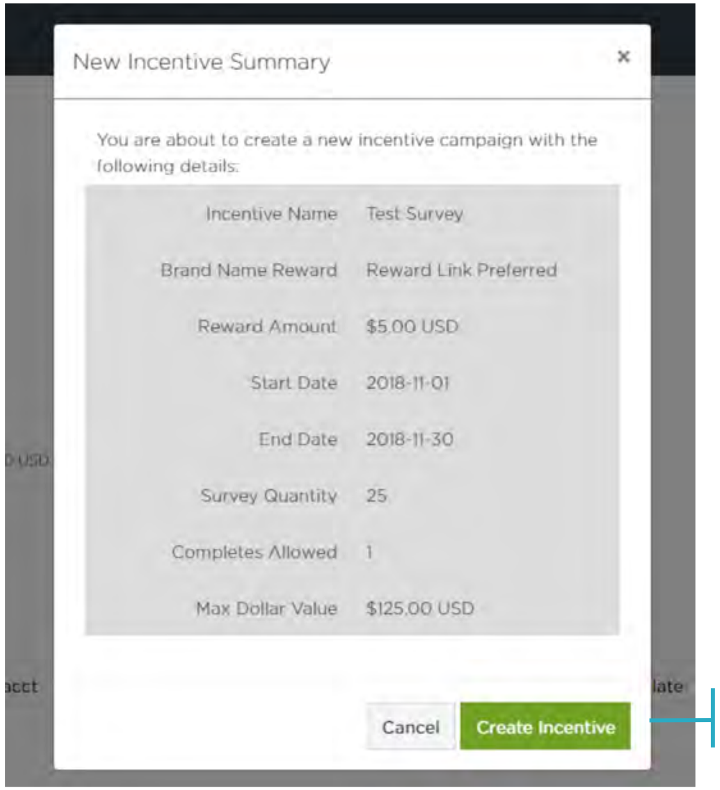
- **Customer and Account Names:** The Group and Account you’ll use to fund the incentive.
- **Email template:** The template on which the reward is sent. If needed, create a template by clicking **+ Create New Template**.

- **Quantity:** Maximum number of incentives. *For example: If your target end size is 100, enter 100.*
- **Completes allowed:** This defaults to **1**. We recommend only increasing that number if you’re planning to request more than one response per participant.
- **Start and end dates:** This should match up with how long you’re fielding your survey. *For example: Use 11/1/2018 through 11/8/2018, for a survey running for one week.*

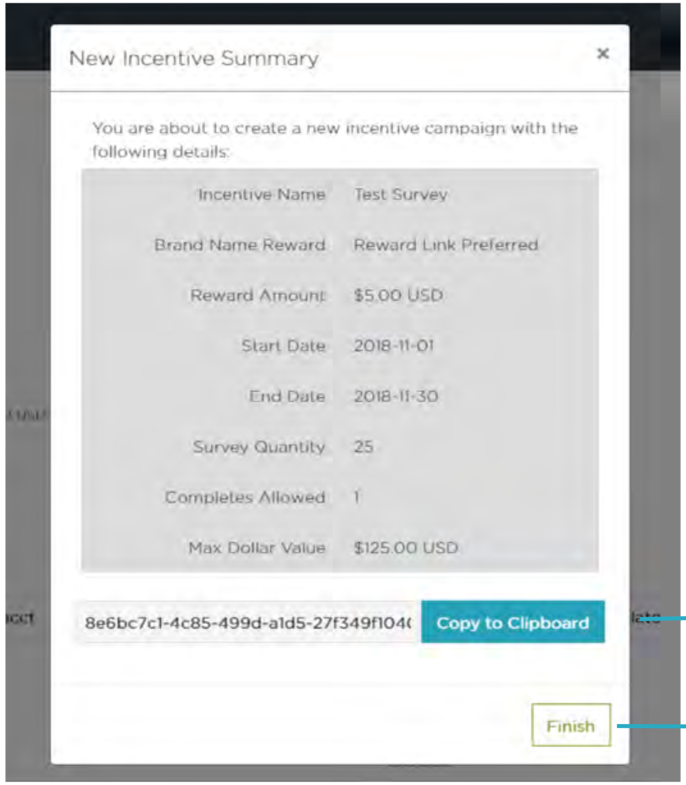
Click here when you’re done!

Rewards Genius

You're almost there! Now is the time to review your incentive summary and complete the incentive-creation process.



1. Once you've verified it all looks correct, click **Create Incentive**.

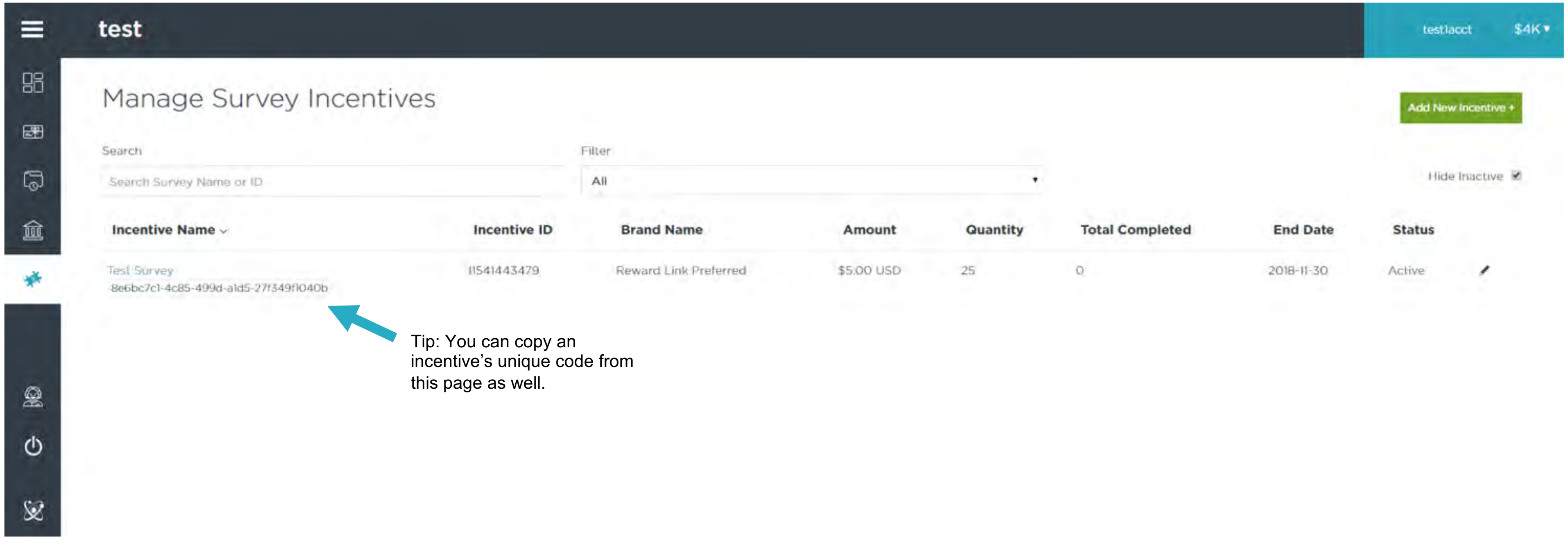


2. Copy this code. You're going to be using it in Qualtrics to complete the integration set-up.
3. Click **Finish**.**

**Funds aren't taken from your account at this time, but you must have enough available at time of creation to cover the full cost of the maximum number of incentives that have been specified.

Rewards Genius

You’ll end up back on the **Incentives** page, where you can view and edit your newly created incentive.

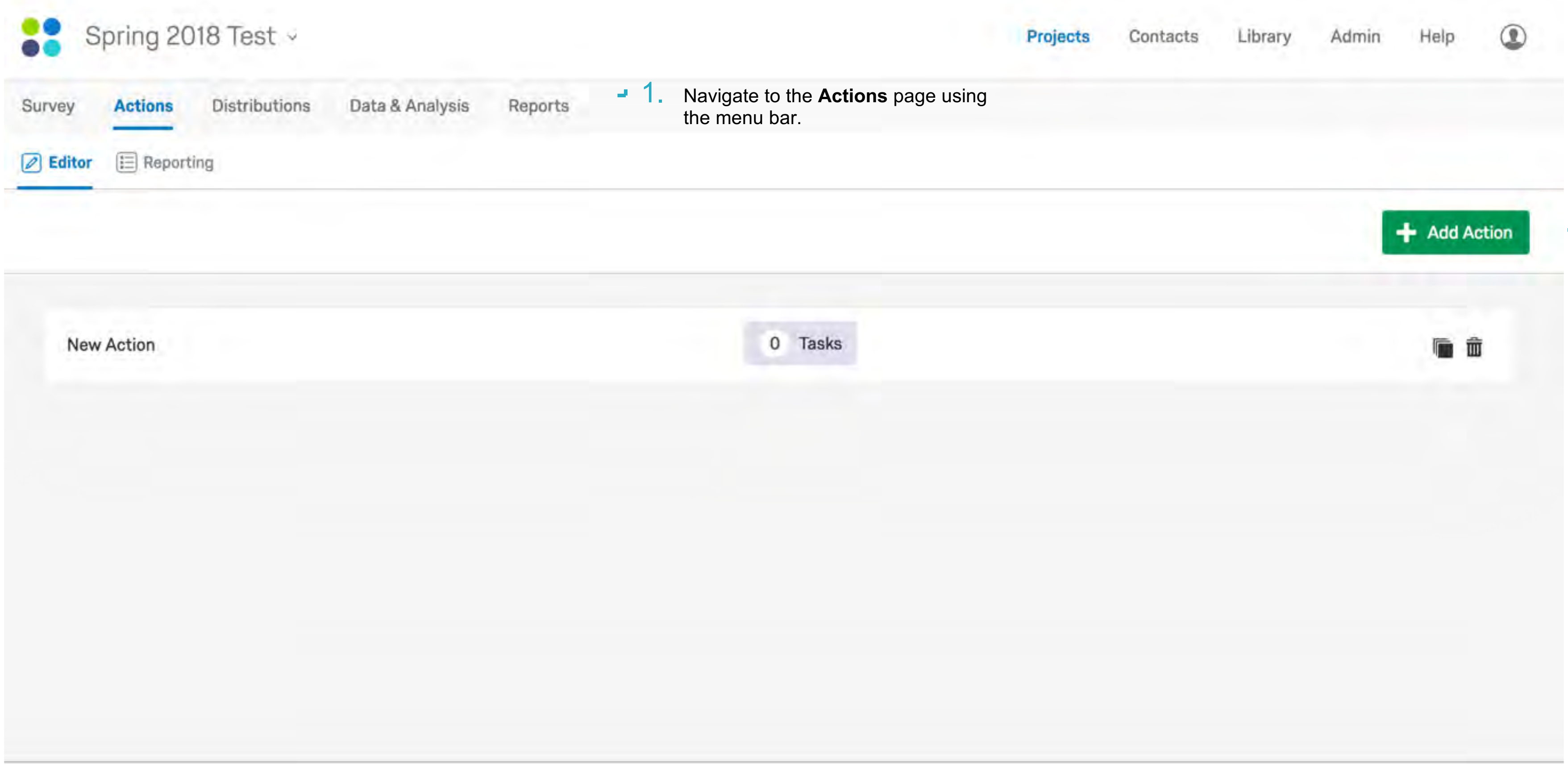


Tip: You can copy an incentive’s unique code from this page as well.

Step Two:
Build a Task
in Qualtrics

Qualtrics

Head to the **Actions** page in your Qualtrics account to get started.

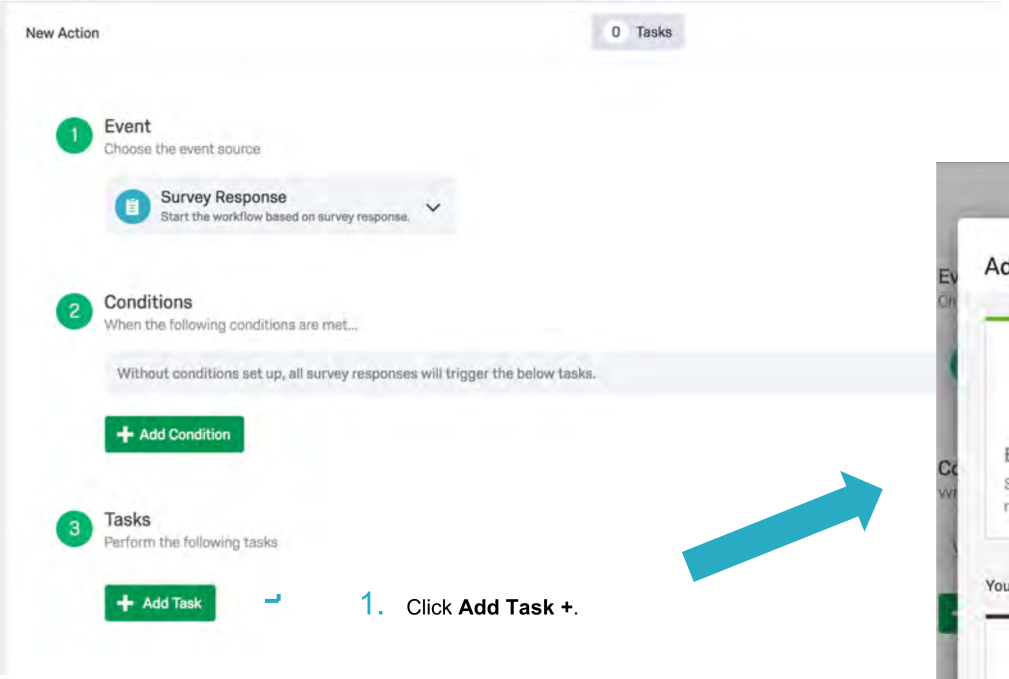


1. Navigate to the **Actions** page using the menu bar.

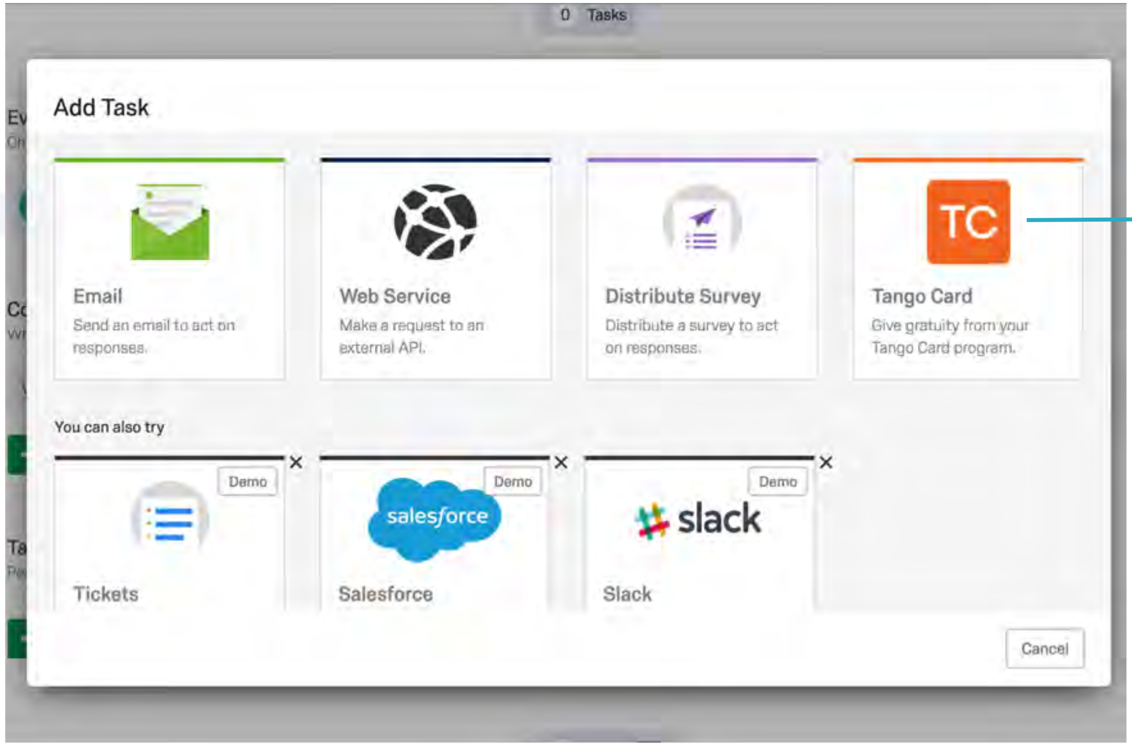
2. Click **Add Action +**.

Qualtrics

Next, choose Tango Card from your task options.



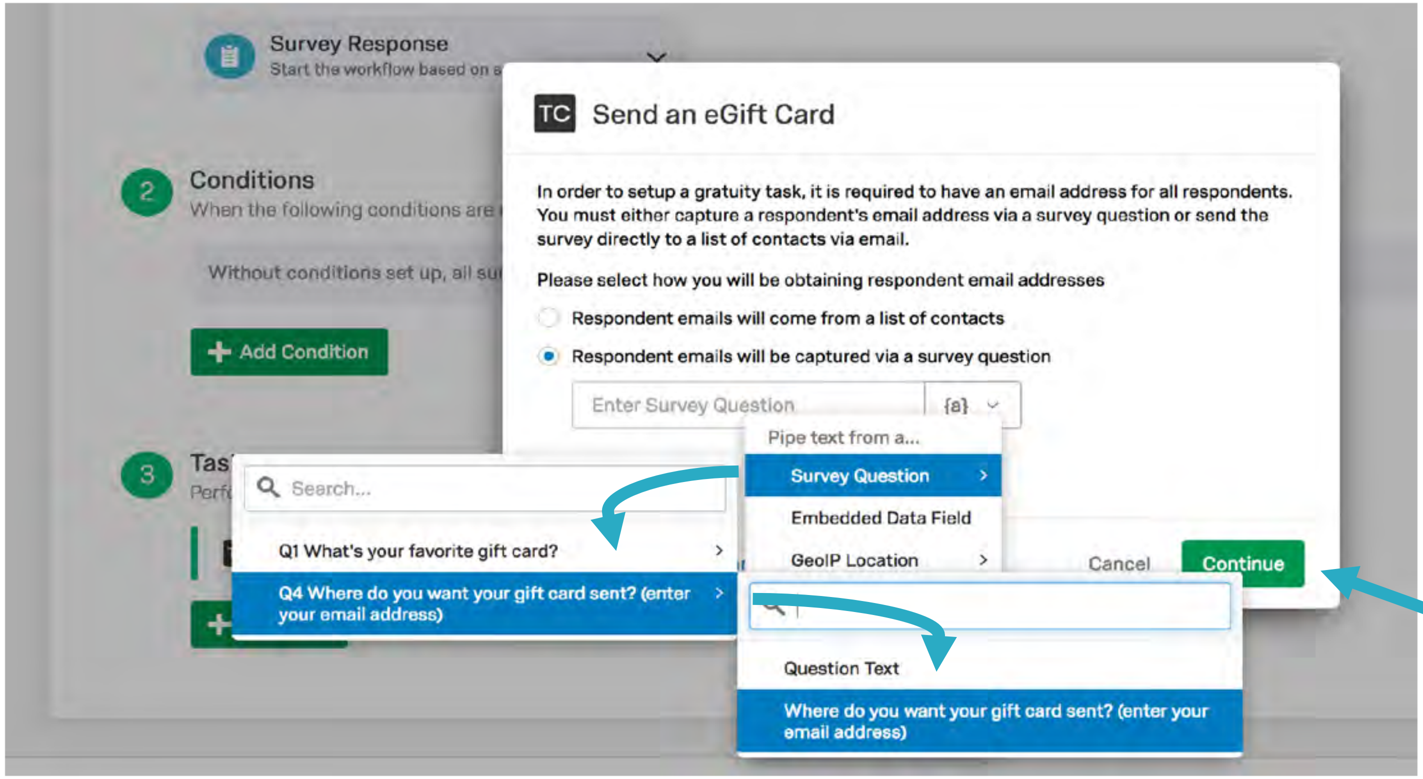
1. Click **Add Task +**.



2. Select **Tango Card**.

Qualtrics

Then choose how you'll collect respondent email addresses.



**The survey question for collecting email addresses must have already been added to your survey prior to configuring this task.

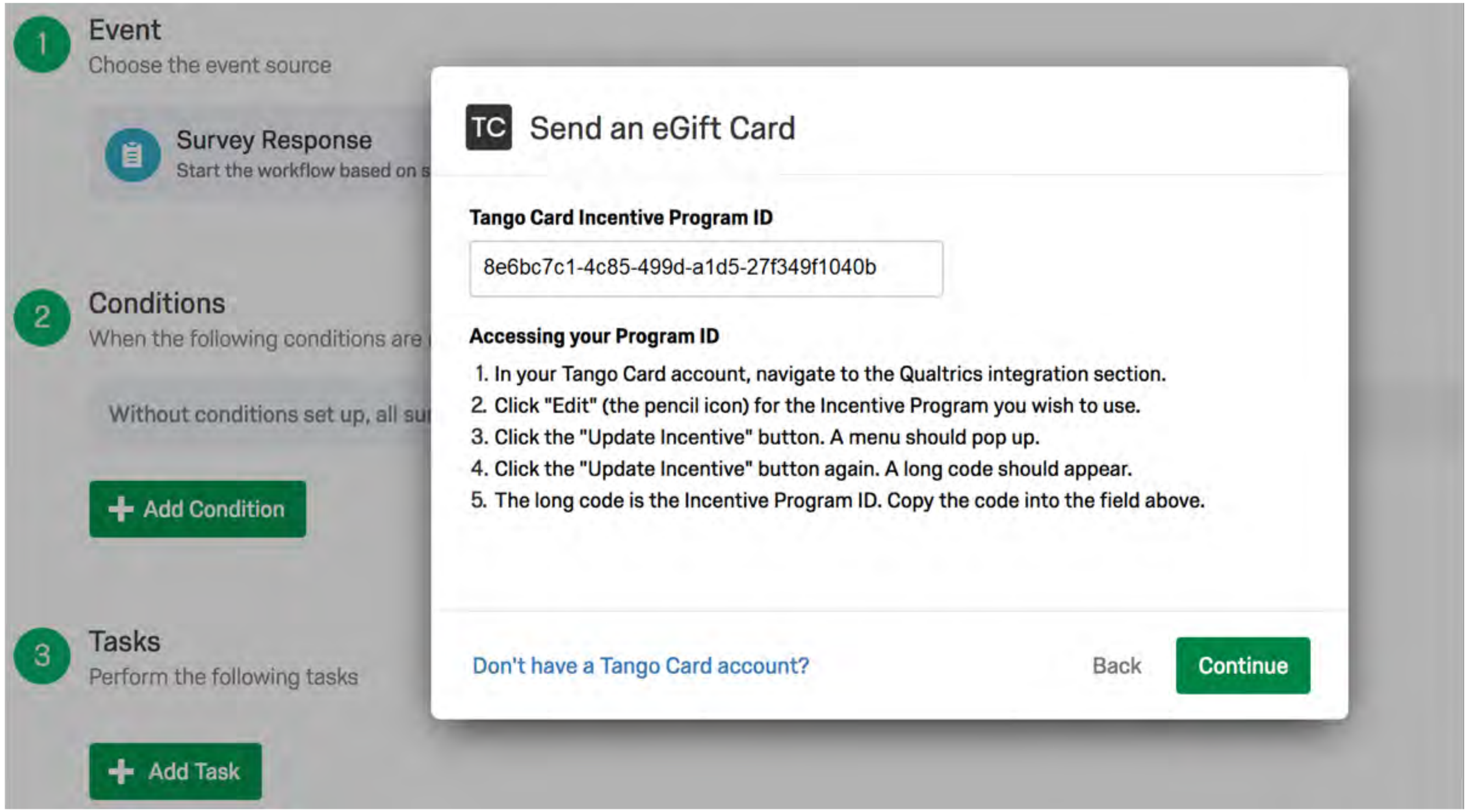
SELECT IF you have a stored list of contacts saved to your Qualtrics account.

SELECT IF you're collecting contact information within the survey.**

Click here when you're done!

Qualtrics

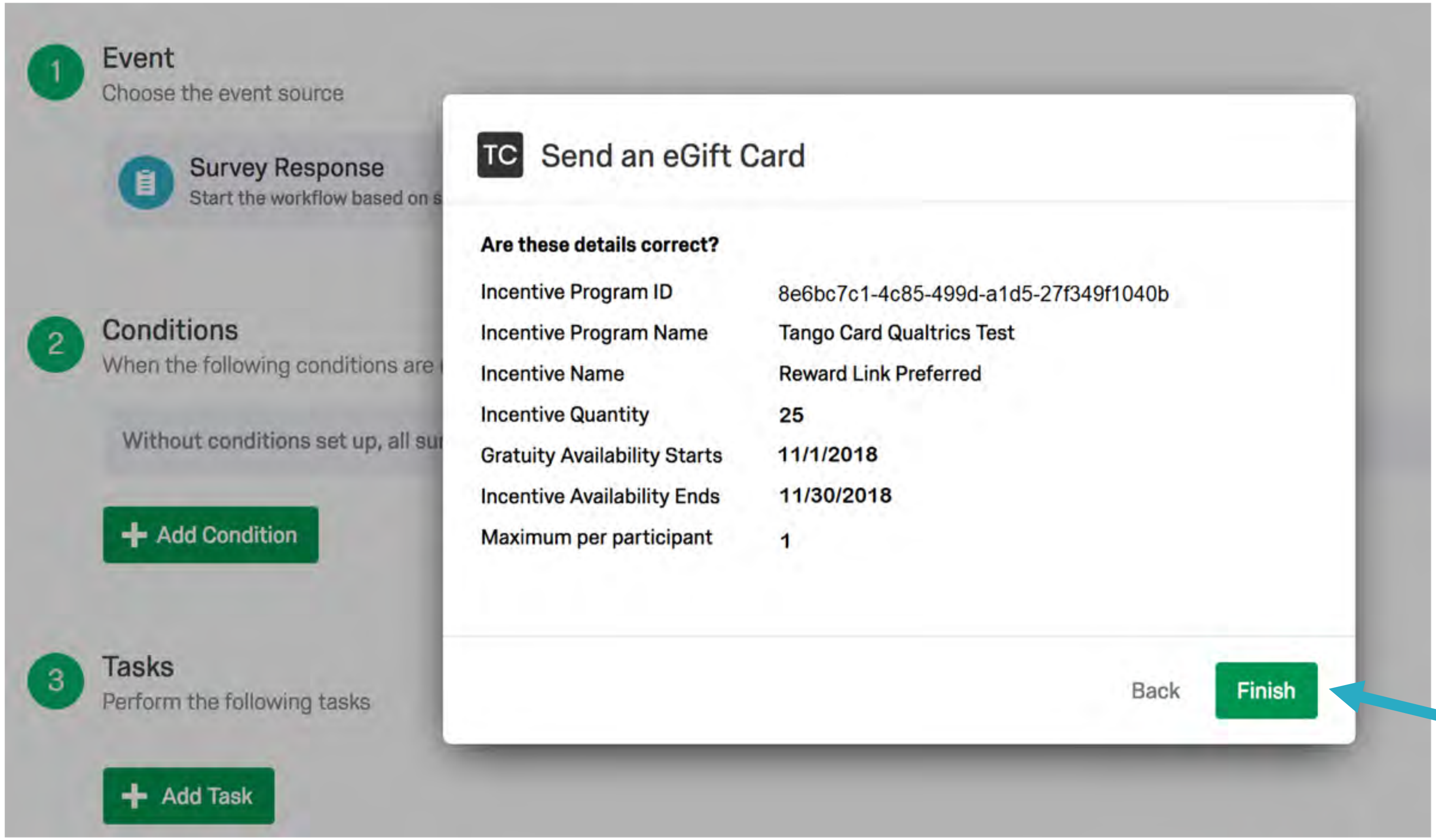
Now is the time to use that code you copied from Rewards Genius.



1. Grab the code you saved from Rewards Genius and paste it into the **Program ID** field.
2. Click **Continue**.

Qualtrics

To wrap things up, review your action details—which should match the information provided when creating the incentive in Rewards Genius—and click **Finish**. Your incentive is ready to go!

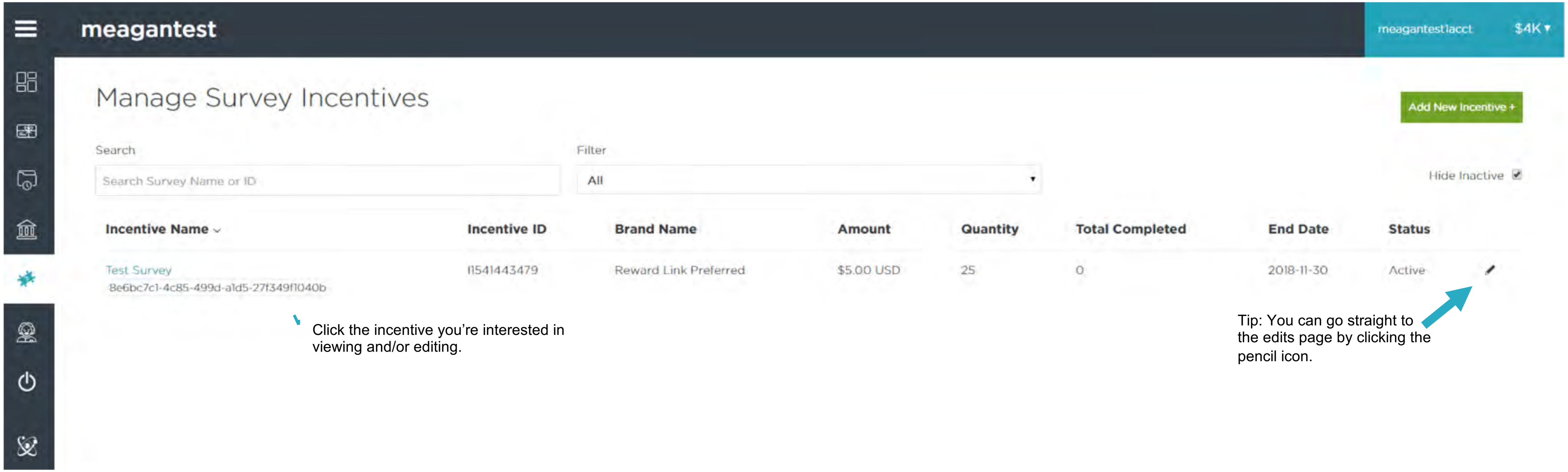


Click here when you're done!

Manage Your Survey Incentives

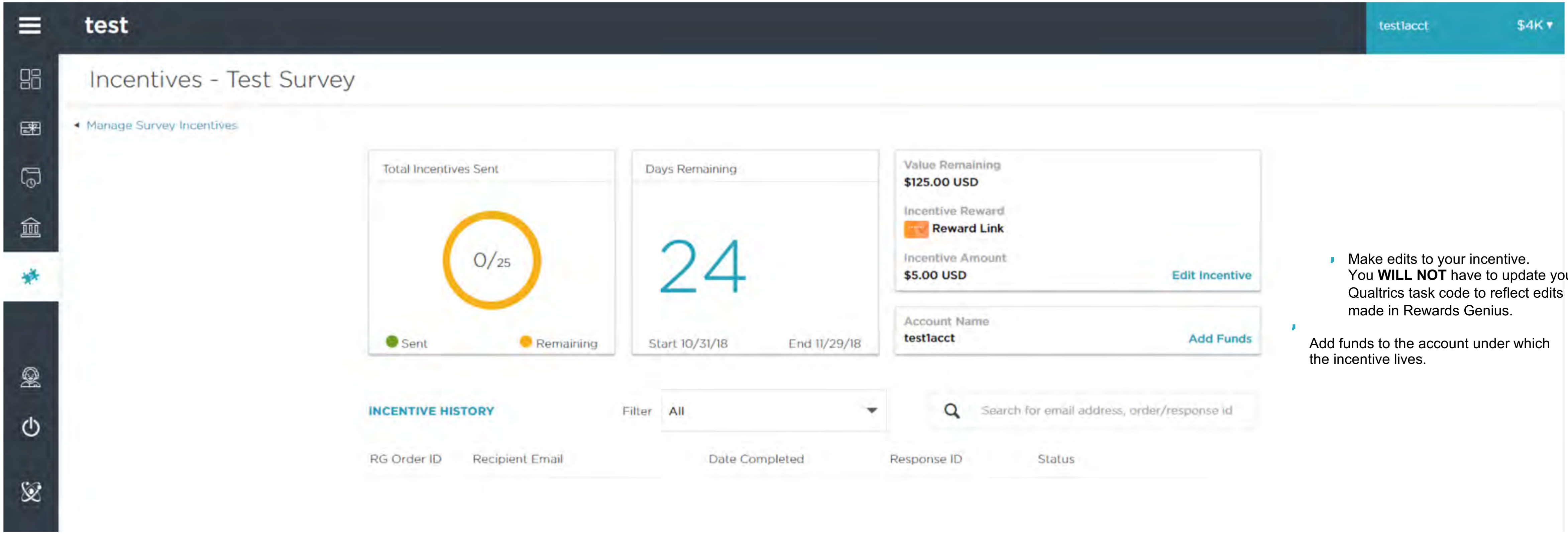
Rewards Genius

At any point, you can log into Rewards Genius and navigating to the **Incentives** to view details about your incentive's performance or to make edits.



Rewards Genius

From this dashboard, you'll be able to view real-time information about your incentive, such as total incentives sent and days remaining, as well as make edits and add funds.



- Make edits to your incentive. You **WILL NOT** have to update your Qualtrics task code to reflect edits made in Rewards Genius.
- Add funds to the account under which the incentive lives.

Let’s get started

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