

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.

testlacct \$4K

Survey Incentives

Filter: All

Incentive ID	Brand Name	Amount	Quantity	Total Completed	End Date	Status
--------------	------------	--------	----------	-----------------	----------	--------

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

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

Rewards Genius

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

1 Incentive Name

Name

Test Survey

2 Incentive Reward

Brand Name

Reward Link Preferred

Card Value - \$0.00 USD - \$2,000.00 USD

5

3 Incentive Client

Customer Name

testlcust

Account Name

testlacct

Email Template

Tango Card Standard Template

4 Incentive Details

Quantity

25

Completes Allowed

1

Start Date

11/01/2018

End Date

11/30/2018

Create Incentive

Click here when you're done!

- **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**.

\$125.00 USD

MAX REWARD VALUE

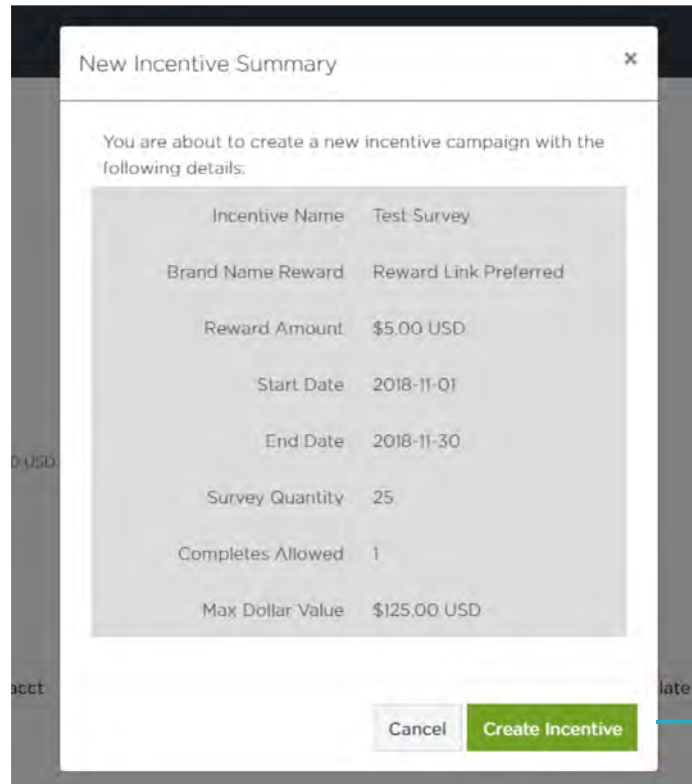
CURRENT BALANCE: \$4,831.16 USD

[+ Add More Funds](#)

- **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.*

Rewards Genius

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

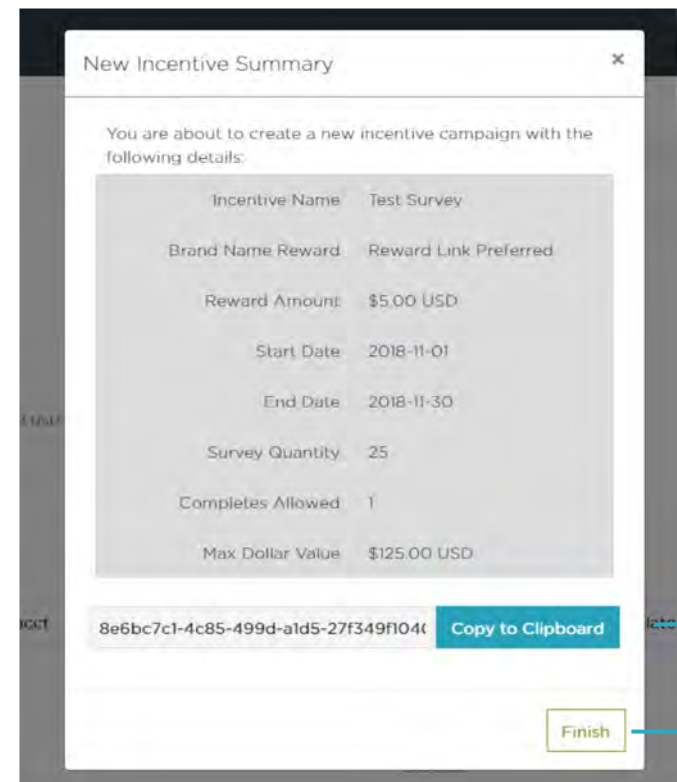


New Incentive Summary

You are about to create a new incentive campaign with the following details:

Incentive Name	Test Survey
Brand Name Reward	Reward Link Preferred
Reward Amount	\$5.00 USD
Start Date	2018-11-01
End Date	2018-11-30
Survey Quantity	25
Completes Allowed	1
Max Dollar Value	\$125.00 USD

Cancel Create Incentive



New Incentive Summary

You are about to create a new incentive campaign with the following details:

Incentive Name	Test Survey
Brand Name Reward	Reward Link Preferred
Reward Amount	\$5.00 USD
Start Date	2018-11-01
End Date	2018-11-30
Survey Quantity	25
Completes Allowed	1
Max Dollar Value	\$125.00 USD

8e6bc7c1-4c85-499d-a1d5-27f349f104c Copy to Clipboard

Finish

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

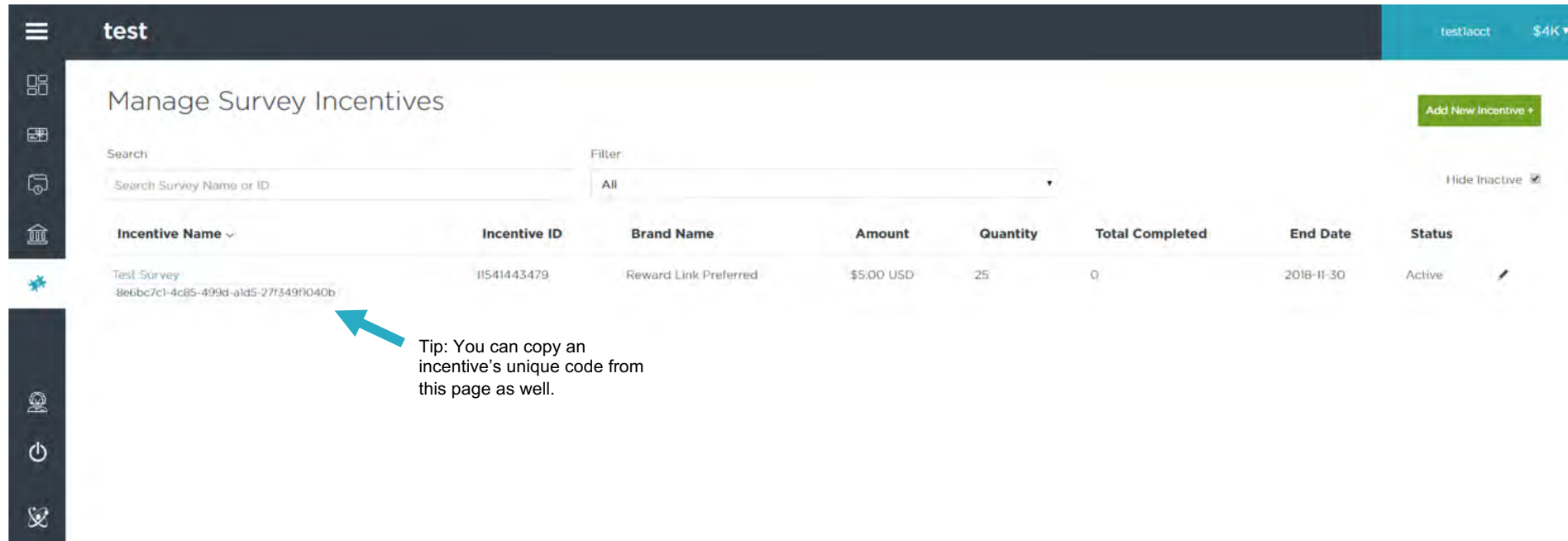
2. Copy this code. You're going to be using it in Qualtrics to complete the integration set-up.

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.



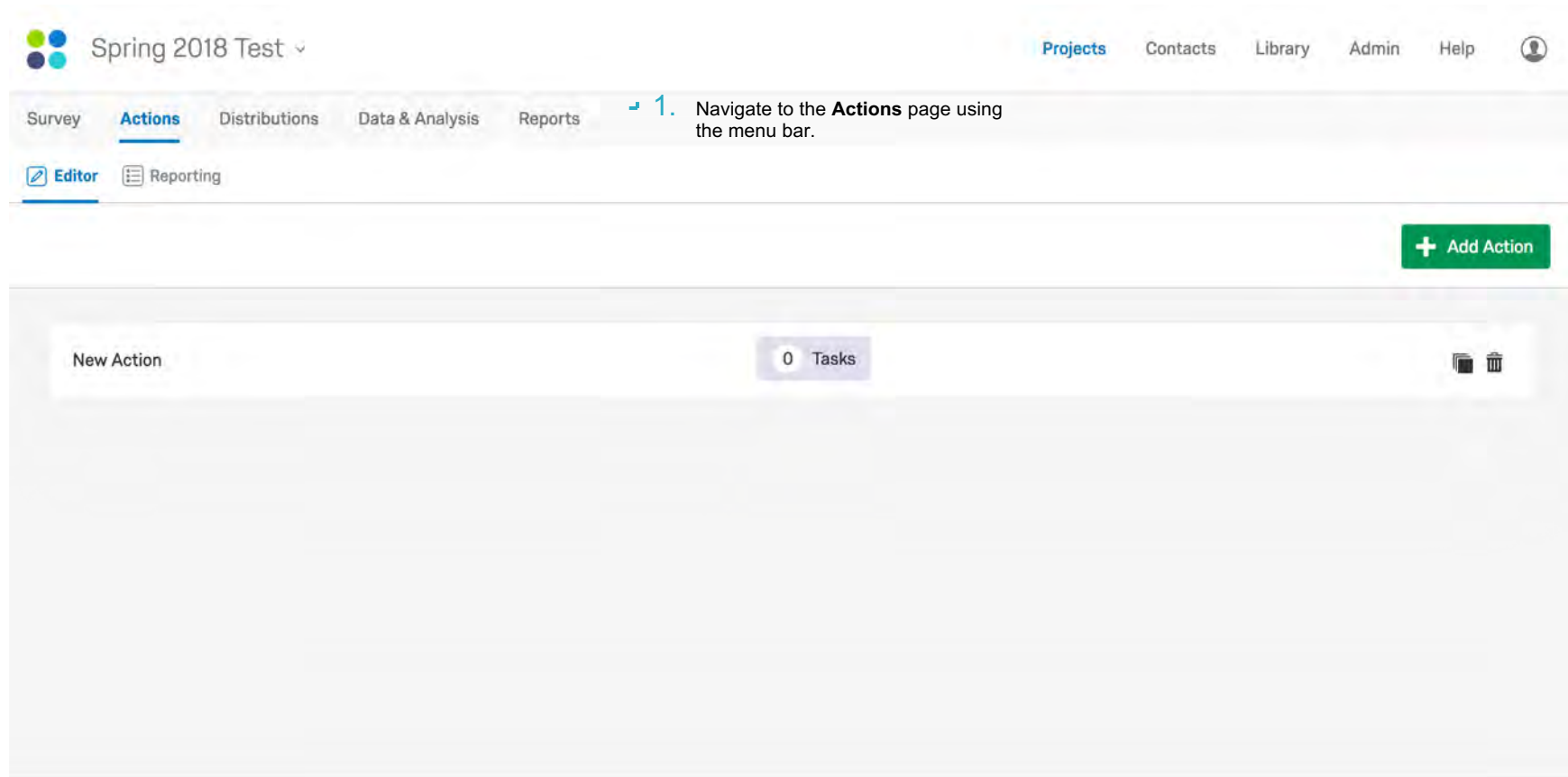
The screenshot displays the 'Manage Survey Incentives' page. At the top, there is a search bar and a filter dropdown set to 'All'. Below this is a table with the following columns: Incentive Name, Incentive ID, Brand Name, Amount, Quantity, Total Completed, End Date, and Status. A single row is visible with the following data: Incentive Name: Test Survey (with a unique code: 8e6bc7c1-4c85-499d-aid5-27f349f1040b), Incentive ID: 11541443479, Brand Name: Reward Link Preferred, Amount: \$5.00 USD, Quantity: 25, Total Completed: 0, End Date: 2018-11-30, and Status: Active. A teal arrow points to the unique code field in the first row. A tip box next to the arrow reads: 'Tip: You can copy an incentive's unique code from this page as well.'

Incentive Name	Incentive ID	Brand Name	Amount	Quantity	Total Completed	End Date	Status
Test Survey 8e6bc7c1-4c85-499d-aid5-27f349f1040b	11541443479	Reward Link Preferred	\$5.00 USD	25	0	2018-11-30	Active

Step Two: Build a Task in Qualtrics

Qualtrics

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



Qualtrics

Next, choose Tango Card from your task options.

New Action 0 Tasks

1 Event
Choose the event source

Survey Response
Start the workflow based on survey response.

2 Conditions
When the following conditions are met...

Without conditions set up, all survey responses will trigger the below tasks.

+ Add Condition

3 Tasks
Perform the following tasks

+ Add Task

1. Click **Add Task +**.

Add Task 0 Tasks

Email
Send an email to act on responses.

Web Service
Make a request to an external API.

Distribute Survey
Distribute a survey to act on responses.

TC
Tango Card
Give gratuity from your Tango Card program.

You can also try

Tickets Demo ×

Salesforce Demo ×

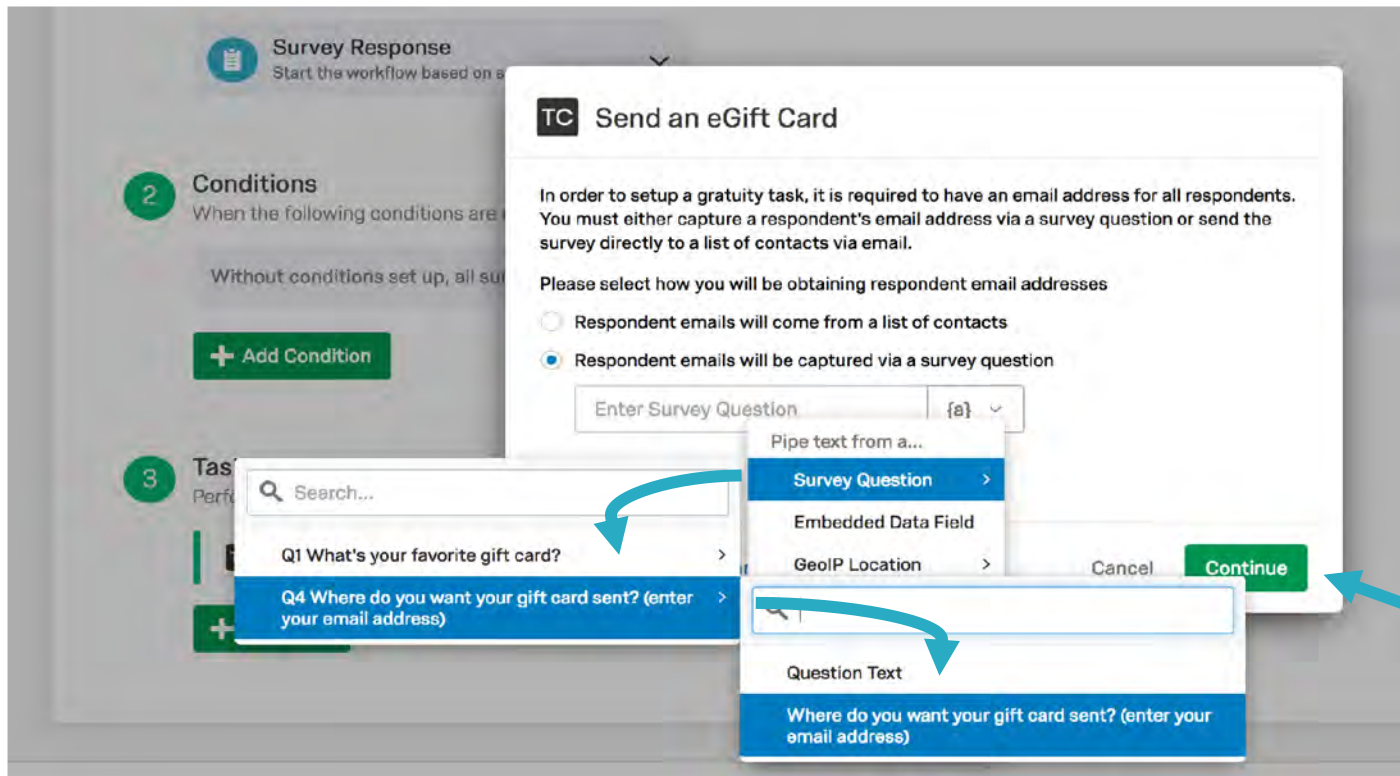
Slack Demo ×

Cancel

2. Select **Tango Card**.

Qualtrics

Then choose how you'll collect respondent email addresses.



- 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!

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

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

1 Event
Choose the event source

Survey Response
Start the workflow based on s

2 Conditions
When the following conditions are

Without conditions set up, all su

+ Add Condition

3 Tasks
Perform the following tasks

+ Add Task

TC Send an eGift Card

Tango Card Incentive Program ID

8e6bc7c1-4c85-499d-a1d5-27f349f1040b

Accessing your Program ID

1. In your Tango Card account, navigate to the Qualtrics integration section.
2. Click "Edit" (the pencil icon) for the Incentive Program you wish to use.
3. Click the "Update Incentive" button. A menu should pop up.
4. Click the "Update Incentive" button again. A long code should appear.
5. The long code is the Incentive Program ID. Copy the code into the field above.

[Don't have a Tango Card account?](#) [Back](#) **Continue**

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!

The screenshot shows the Qualtrics interface with three main sections: 1. Event (Choose the event source), 2. Conditions (When the following conditions are met), and 3. Tasks (Perform the following tasks). A modal dialog titled 'TC Send an eGift Card' is open, displaying the following details:

Are these details correct?	
Incentive Program ID	8e6bc7c1-4c85-499d-a1d5-27f349f1040b
Incentive Program Name	Tango Card Qualtrics Test
Incentive Name	Reward Link Preferred
Incentive Quantity	25
Gratuity Availability Starts	11/1/2018
Incentive Availability Ends	11/30/2018
Maximum per participant	1

At the bottom of the dialog, there are two buttons: 'Back' and 'Finish'. A blue arrow points to the 'Finish' button with the text 'Click here when you're done!'.

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.

meagantest meagantest/lacct \$4K

Manage Survey Incentives

Add New Incentive +

Search: Search Survey Name or ID Filter: All Hide Inactive

Incentive Name	Incentive ID	Brand Name	Amount	Quantity	Total Completed	End Date	Status
Test Survey 8e6bc7c1-4c85-499d-a1d5-27f349f1040b	11541443479	Reward Link Preferred	\$5.00 USD	25	0	2018-11-30	Active

Click the incentive you're interested in viewing and/or editing.

Tip: You can go straight to the edits page by clicking the pencil icon.

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.

The dashboard for 'test' account shows the following details:

- Total Incentives Sent:** 0/25 (0 Sent, 25 Remaining)
- Days Remaining:** 24 (Start: 10/31/18, End: 11/29/18)
- Value Remaining:** \$125.00 USD
- Incentive Reward:** Reward Link
- Incentive Amount:** \$5.00 USD
- Account Name:** testlacct

INCENTIVE HISTORY

RG Order ID	Recipient Email	Date Completed	Response ID	Status
-------------	-----------------	----------------	-------------	--------

- 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

Nick Balestino

Director – Business Development

Nick.Balestino@tangocard.com

612-202-5619