



BHN Rewards Integration with Salesforce

Setup guide

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1. Introduction

BHN Rewards is a rewards management solution that enables businesses to send digital rewards to partners, customers, and employees. The BHN Rewards app for Salesforce empowers Salesforce users to seamlessly send rewards within the Salesforce platform.

This setup guide offers guidance for Salesforce administrators to deploy BHN Rewards in Salesforce and provides essential information for Salesforce users to get started with sending out rewards using BHN Rewards

1.1 Overview of BHN Rewards in Salesforce

The BHN Rewards for Salesforce App allows users to instantly send rewards within Salesforce. The app runs inside Salesforce, and lets users send rewards directly from Salesforce platform. The reward email will be sent to respective email address of the Lead and Contact

- Allows Sales representatives & AM to easily send out digital rewards to clients and customers directly within the Salesforce platform, streamlining the reward distribution process and saving time.
- Allows Customer Service representatives to easily send out digital rewards to contacts who have raised a case in Salesforce.
- Ability to track the rewards sent, check the status of the rewards, and view the reward history of the contact & lead from Salesforce platform.
- Enjoy full control over multiple campaigns and user groups.

2. Deployment guidance for Salesforce administrators

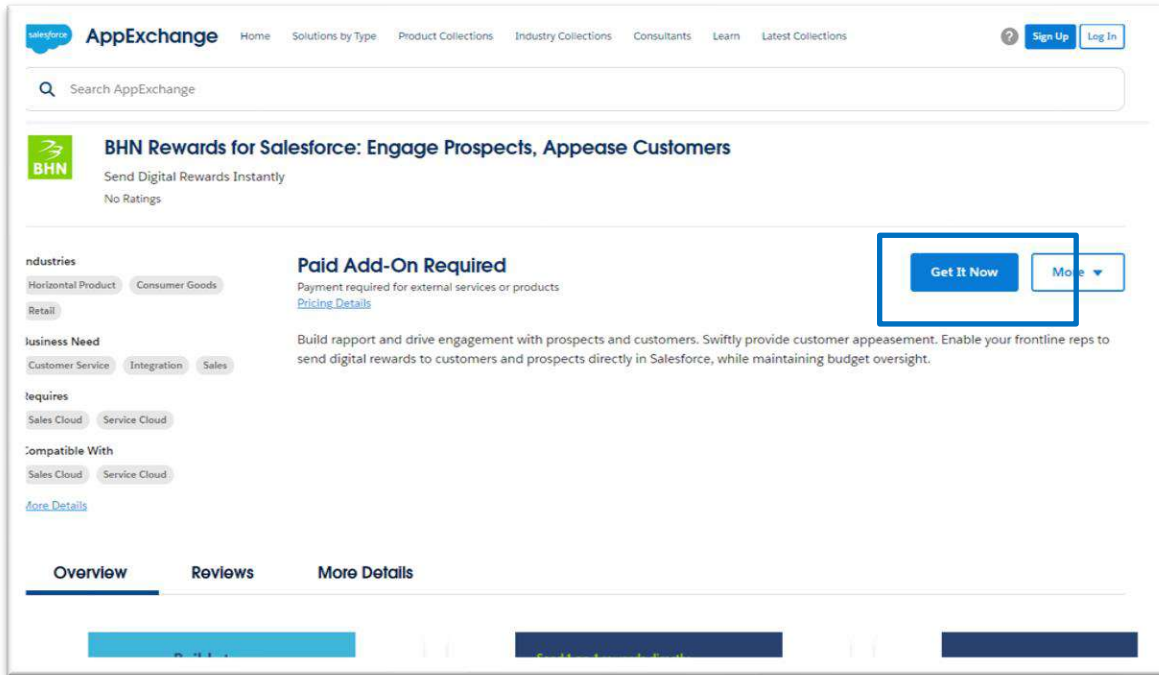
2.1 Prerequisites

Prior to deploying BHN Rewards in Salesforce, ensure that you have:

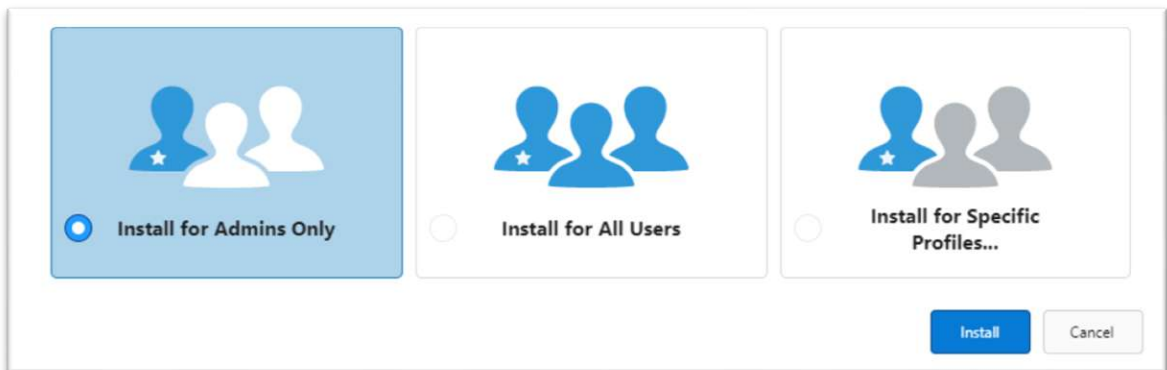
- An active Salesforce subscription
- Access to a Salesforce administrator account
- An active BHN Rewards subscription for your organization

2.2 Install the BHN Rewards App from Salesforce AppExchange

1. Go to Salesforce AppExchange and download the BHN Rewards from Salesforce AppExchange Marketplace



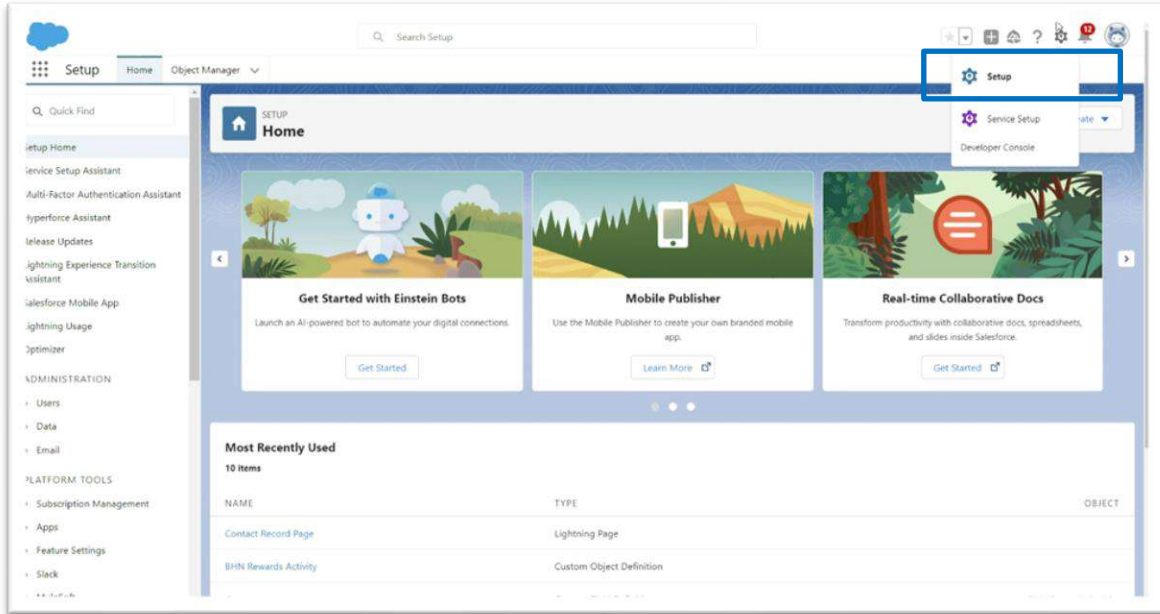
2. Login to your salesforce org with SF admin credentials
3. Select "Install for Admins Only" (Recommended). This option allows you to manage permissions after the app package has been installed.



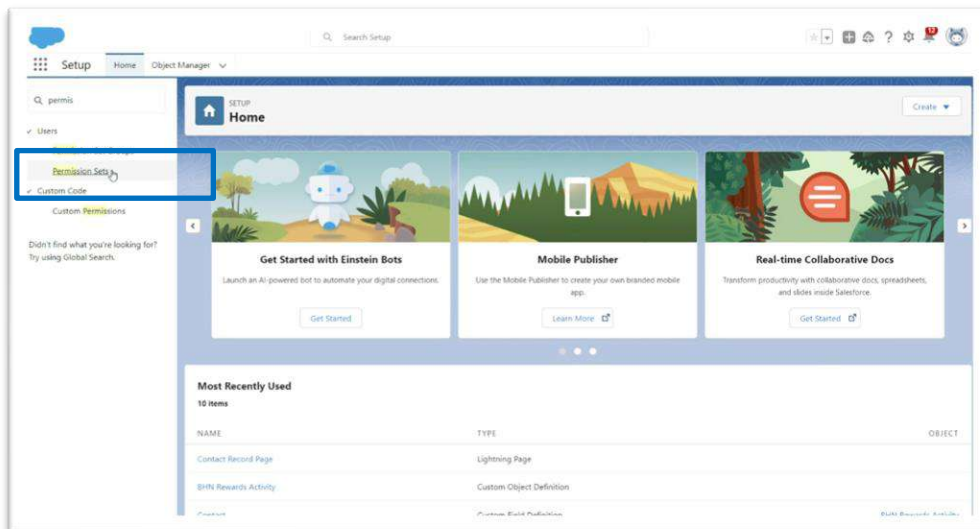
4. Select the checkbox to "Approve Third Party Access." It allows data transfer between Salesforce and BHN Rewards
5. Click "Continue" to start the package installation. Salesforce send a notification email once the installation is successful.

2.3 Setup user permissions for BHN Rewards App in Salesforce Org

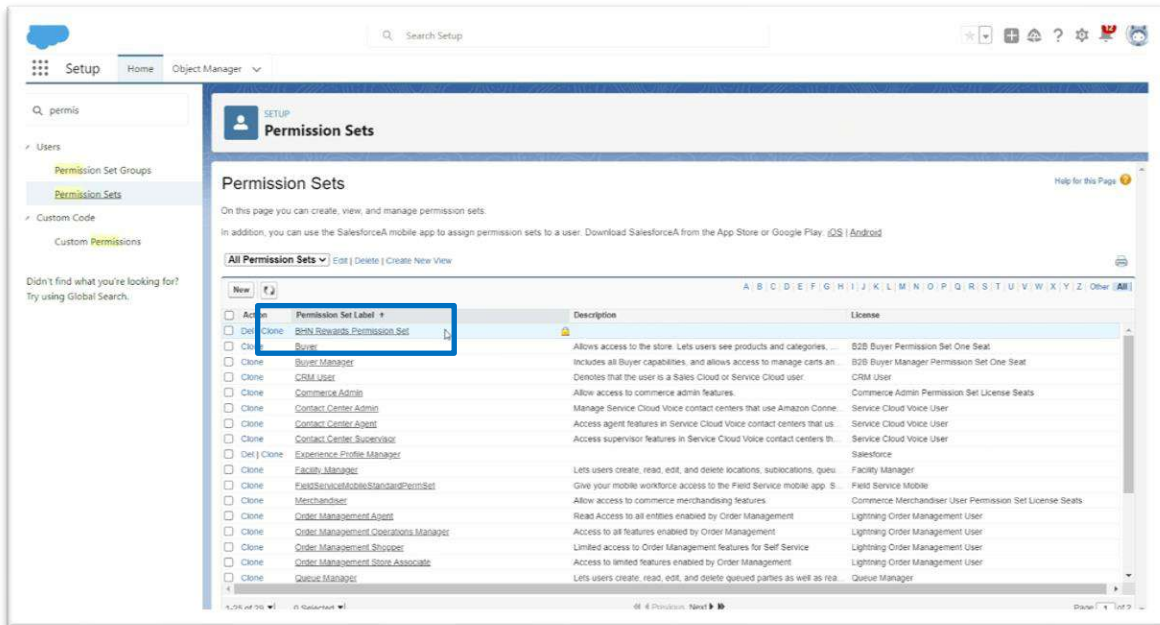
1. Login to your salesforce org with SF admin credentials
2. Click on Setup



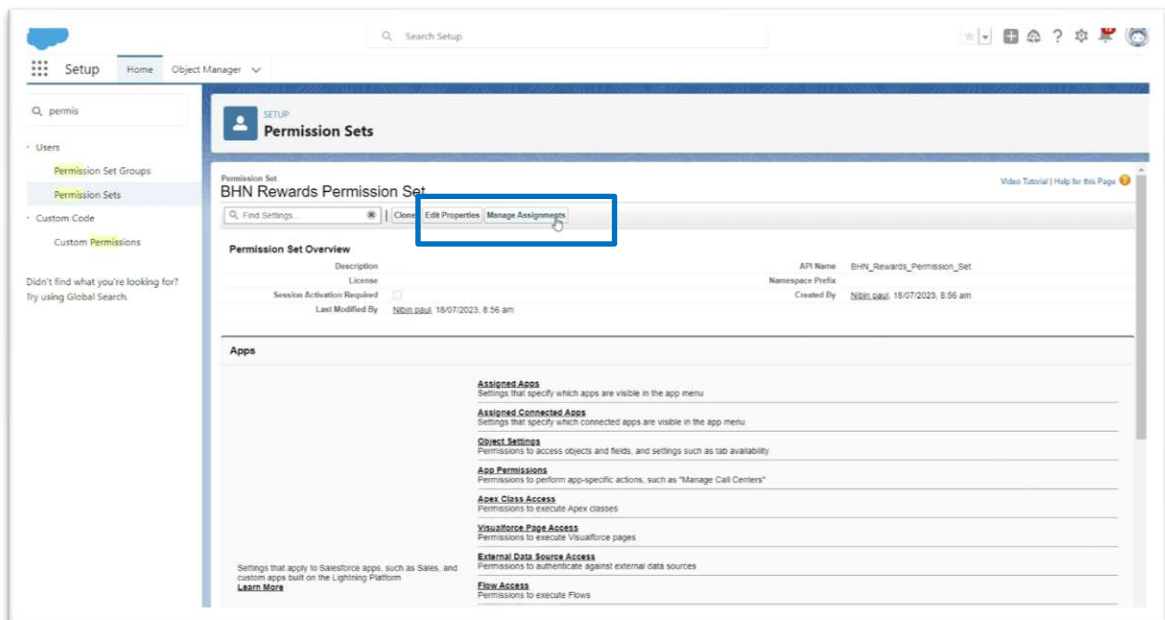
6. Search for permission set in the setup search.



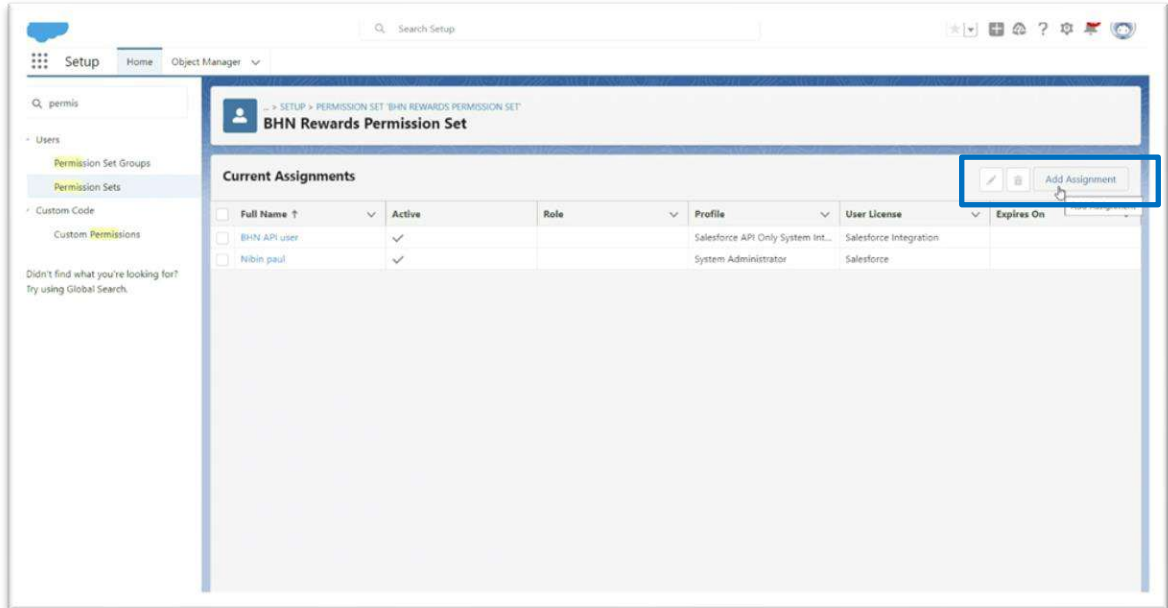
7. Click on BHN Rewards Permission Set to view the details.



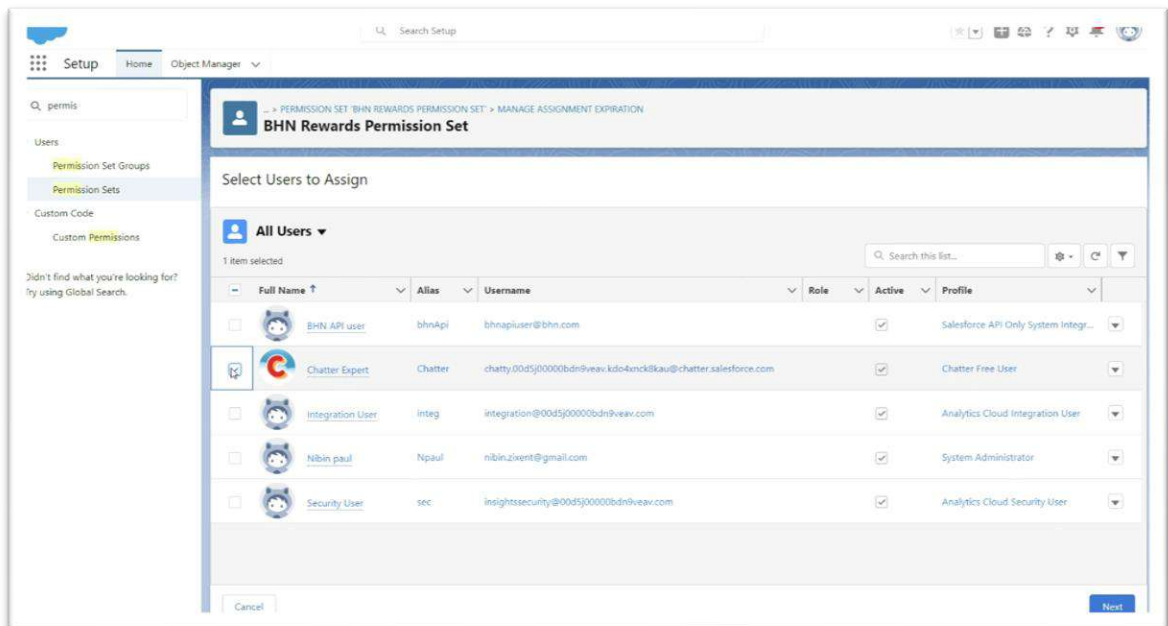
8. Click on Manage Assignments.



9. Click on Add Assignments



10. Select the users to give permission.



11. Click on assign to save the settings.

Setup Home Object Manager

Search Setup

PERMISSION SET BHN REWARDS PERMISSION SET > MANAGE ASSIGNMENT EXPIRATION

BHN Rewards Permission Set

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

Time Zone: Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Nitin paul		System Administrator	✓	Salesforce	Never Expires
Integration User		Analytics Cloud Integration User	✓	Analytics Cloud Integration User	Never Expires

Cancel Back Assign

Setup Home Object Manager

Search Setup

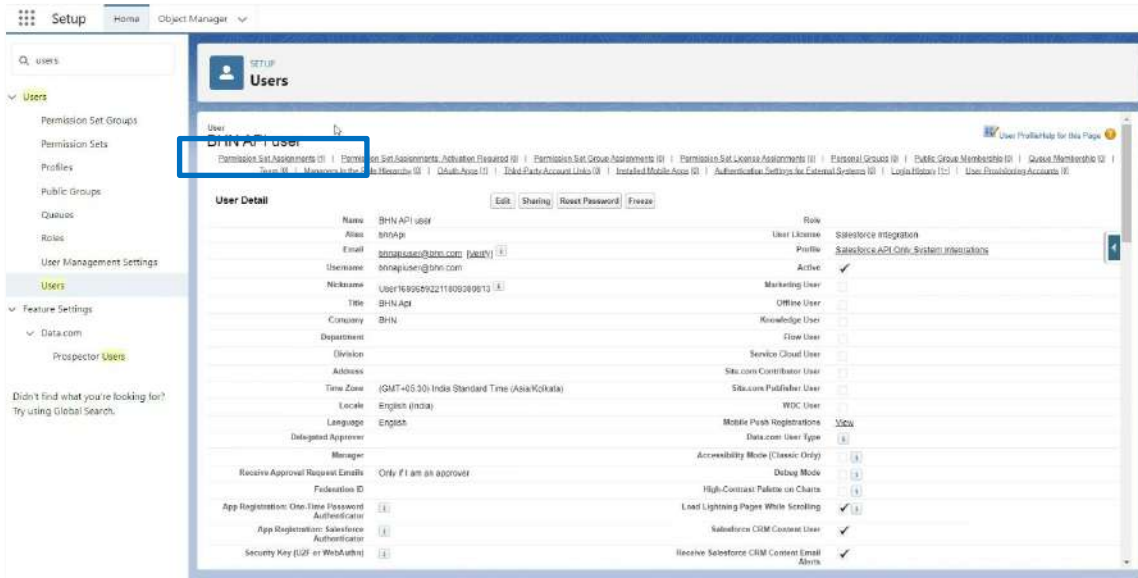
1 assignments were successful.

Assignment Summary

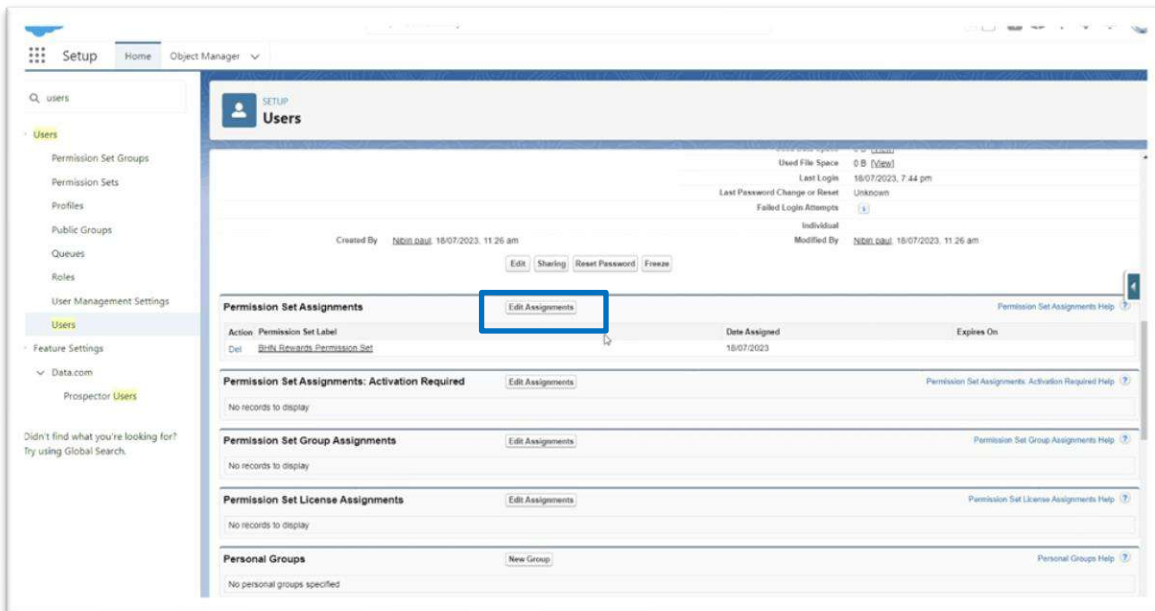
Full Name	User License	Expires On	Time Zone	Status
Integration User	Analytics Cloud Integration User			Success

Done

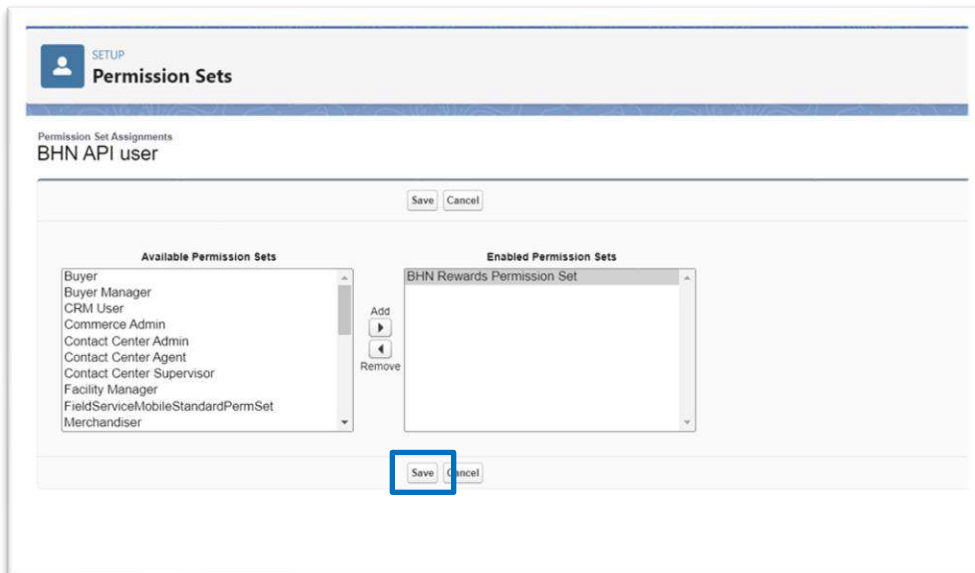
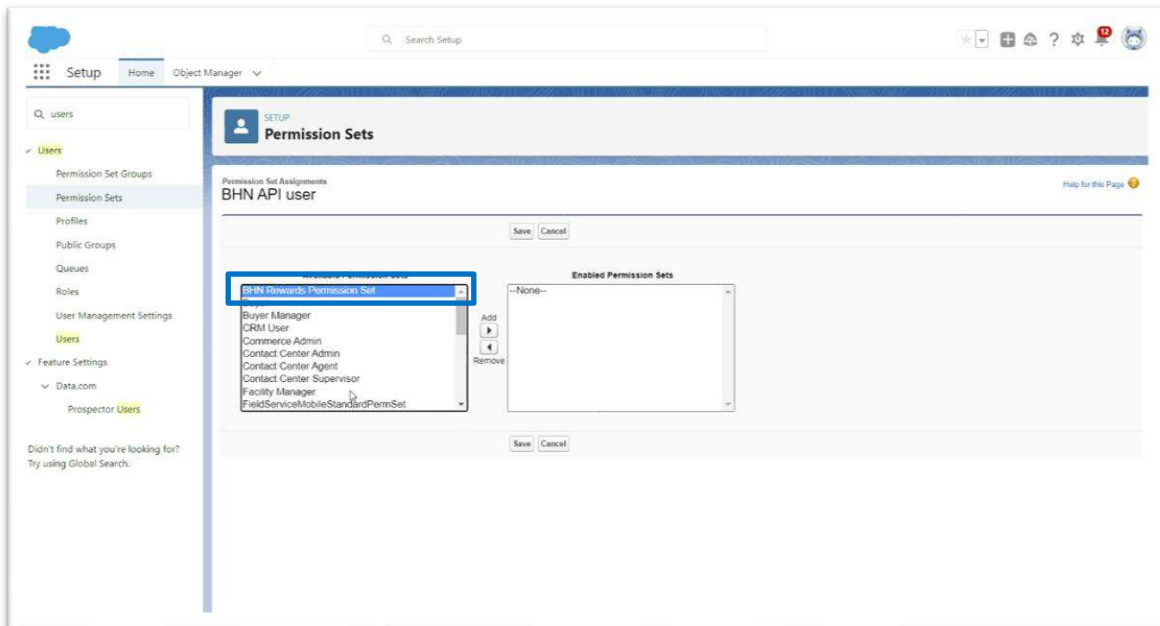
3. Click on "Permission set assignment"



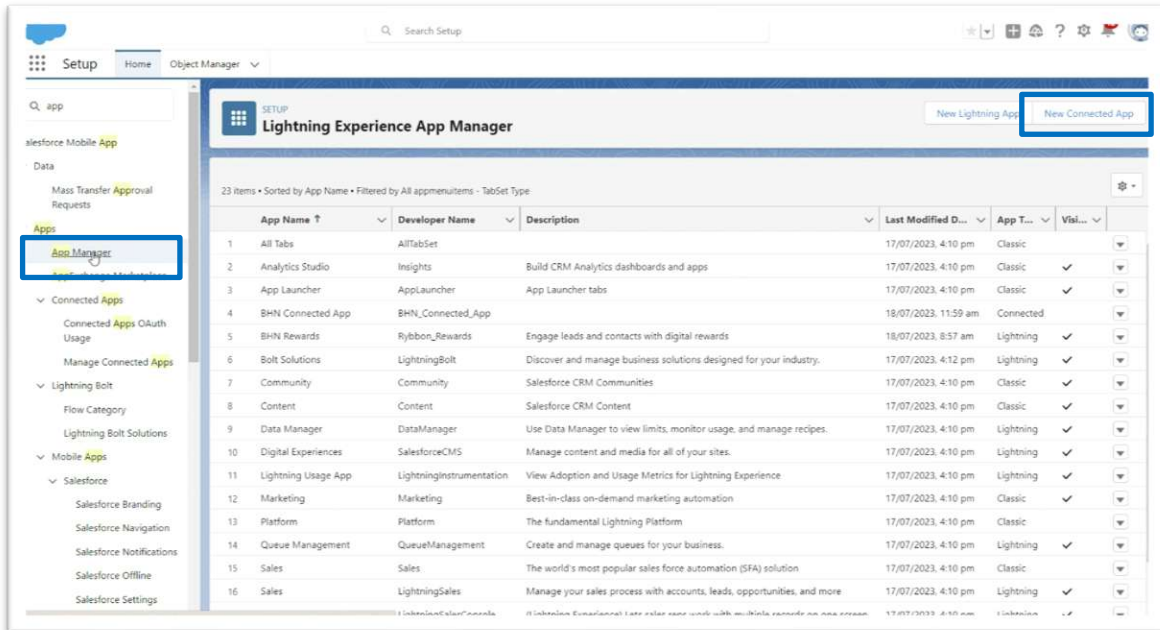
4. Click on "Edit Assignment"



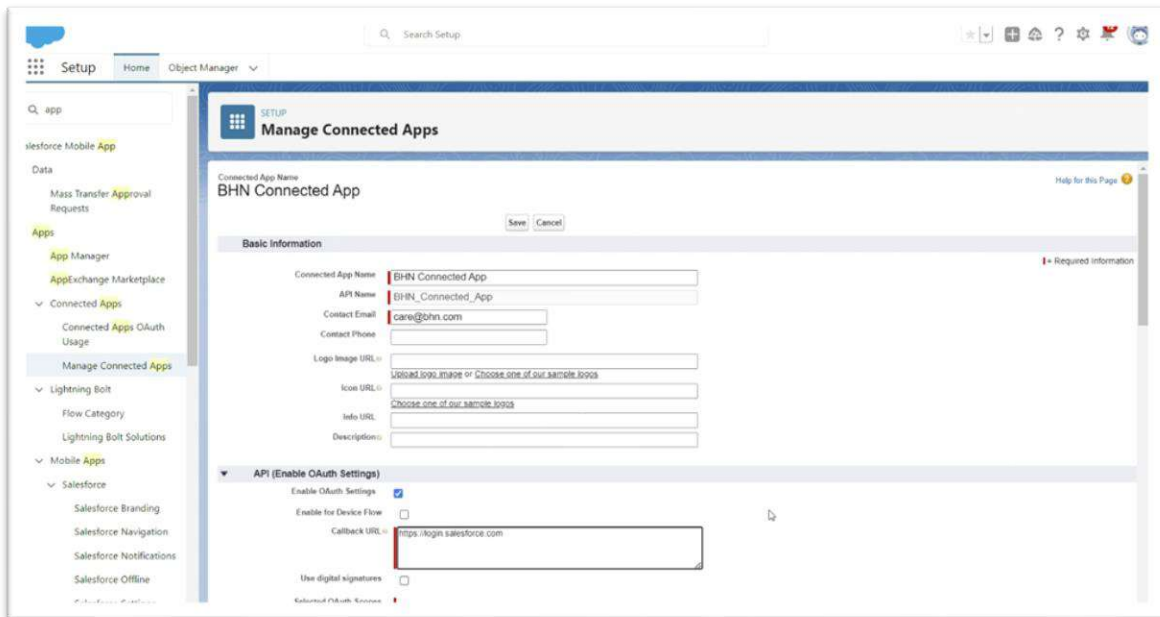
5. Enable " BHN rewards Permission set" and click save.



- In the setup main menu, Go to App manager to create new connected apps. Click on “New Connect App”

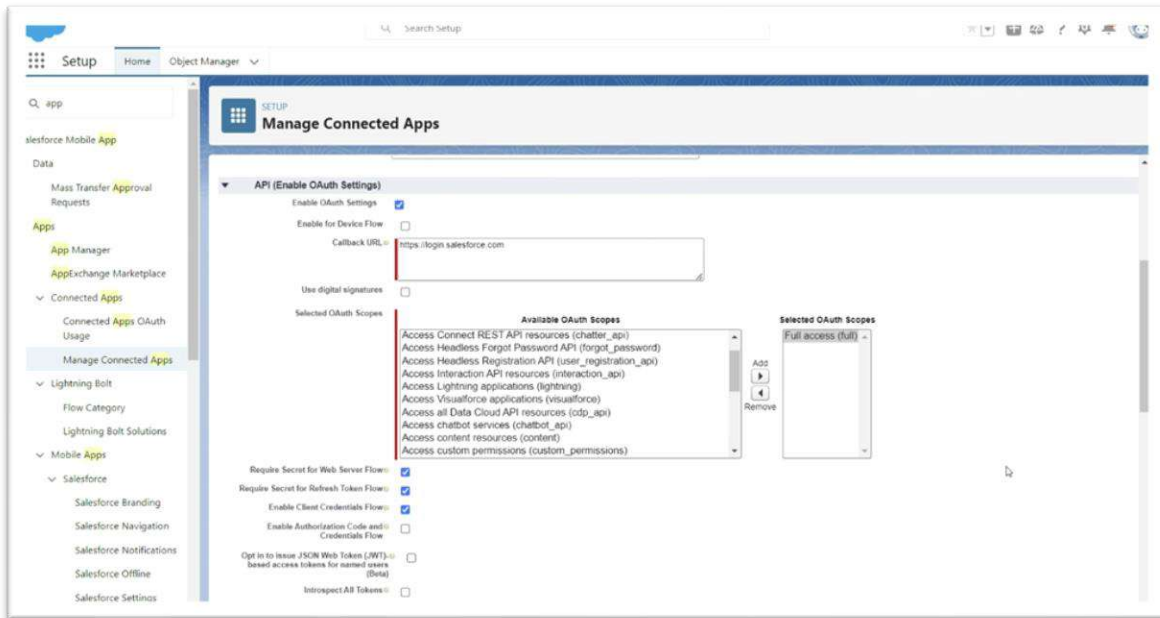


- Enter the below details and create a new “Connected App.”

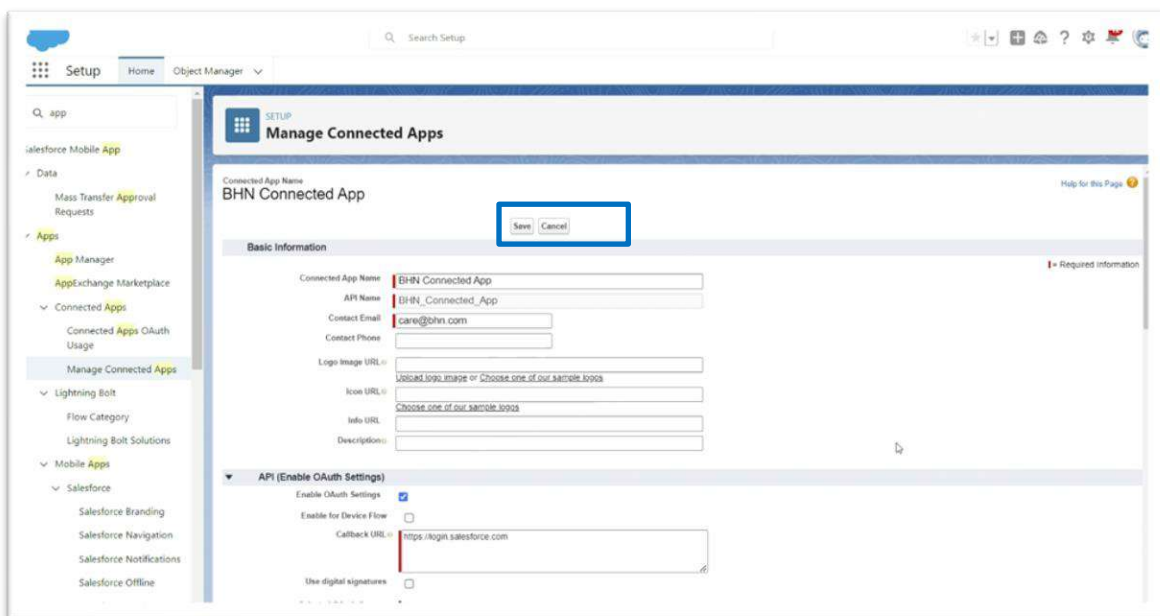


- Connected App Name: BHN Connected App
- API Name: BHN_Connected_App
- Contact Email: care@bhn.com
- Callback URL: https://login.salesforce.com
- Enable the below check boxes.

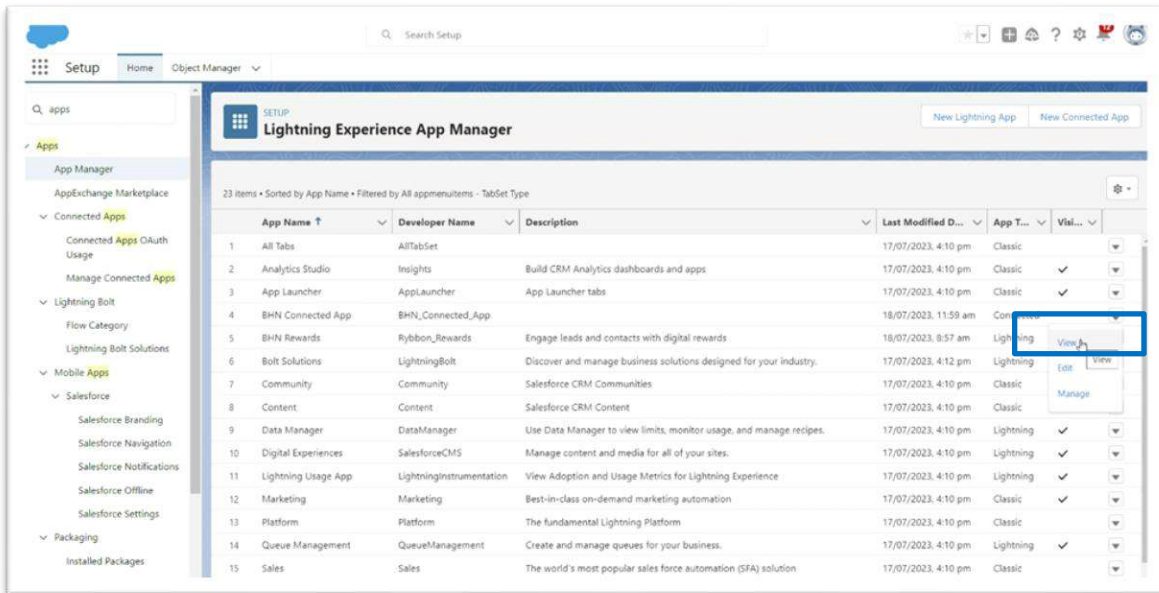
- Require secret for Web server flow.
- Require secret for Refresh token flow.
- Enable client credentials flow.



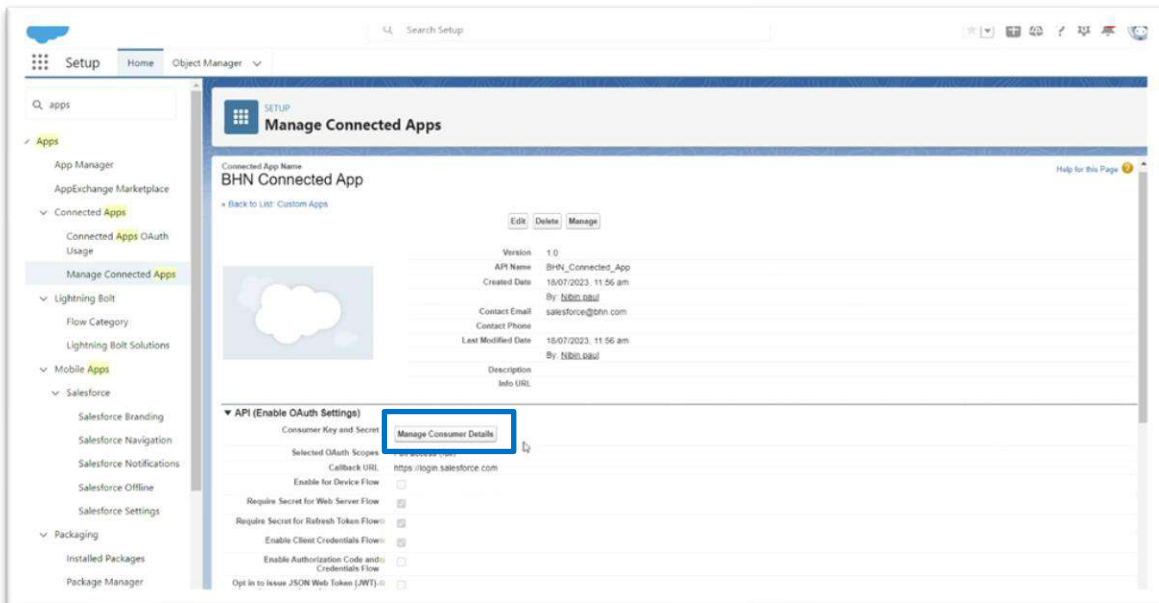
8. Click on save to create a new Connected App



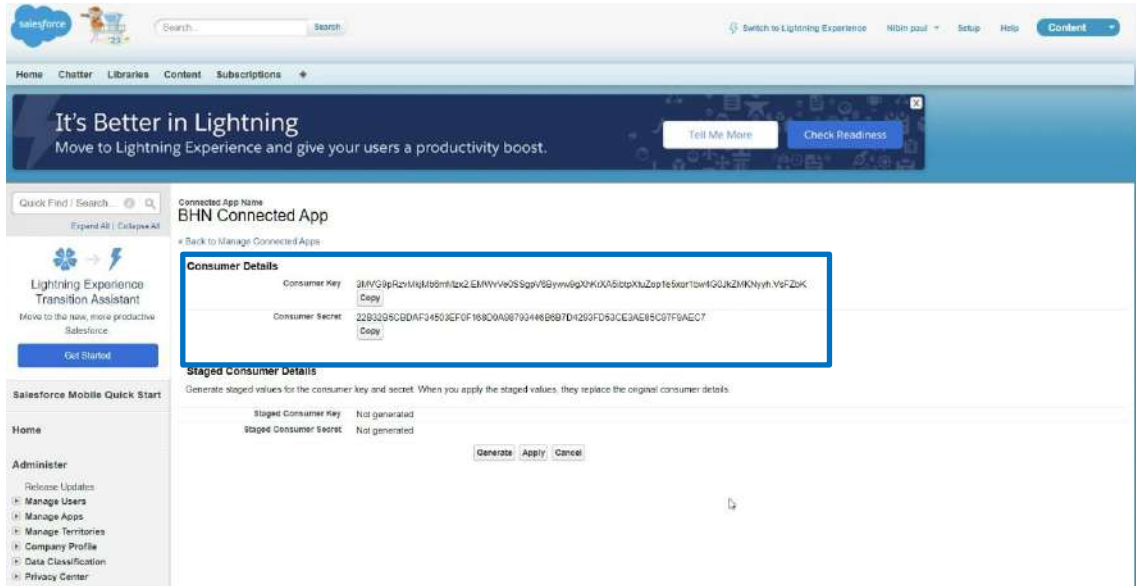
- In the App Manager main list, click on “View” of the newly created Connected App – “BHN Connected App.”



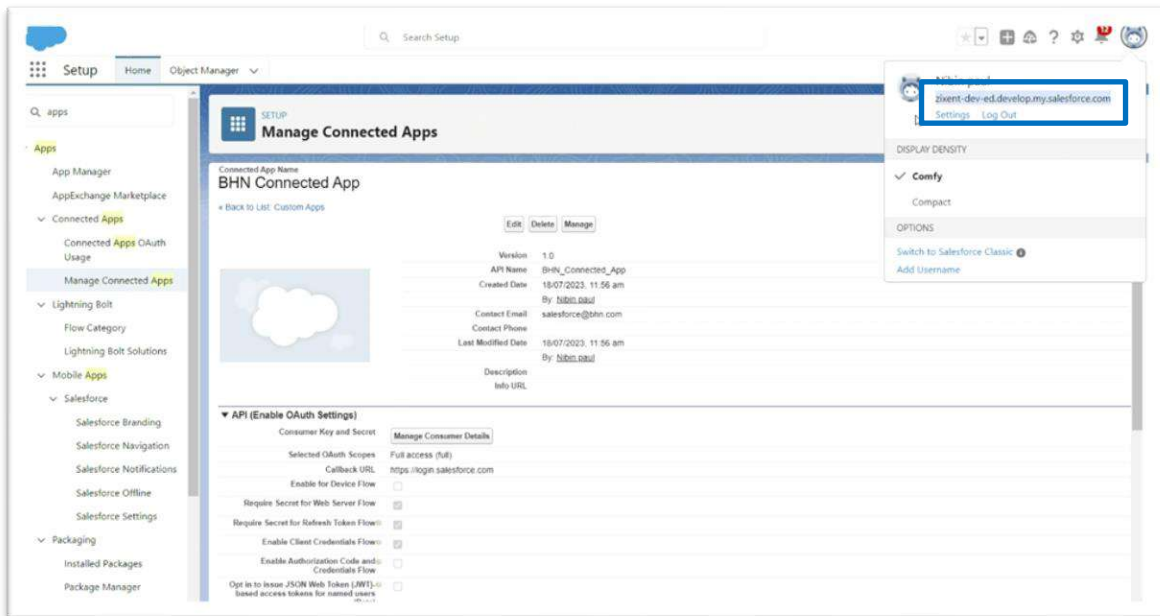
- Click on “Manage consumer details.”



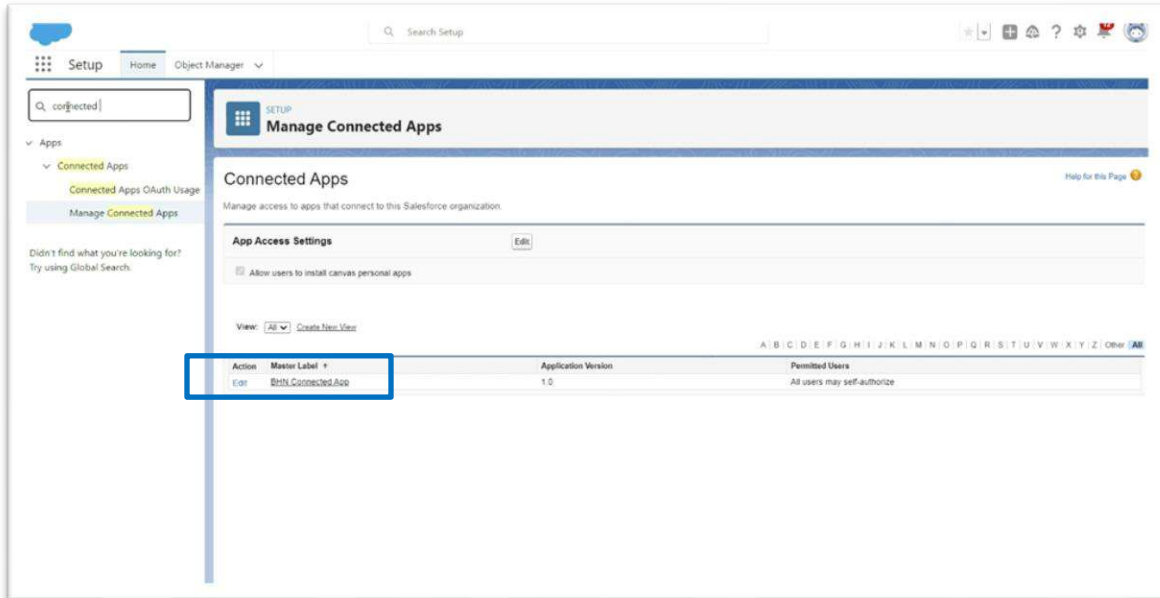
- Share the details you see in this page- “Consumer Key” and “Consumer Secret” to BHN Rewards Admin to connect BHN Rewards account with Salesforce.



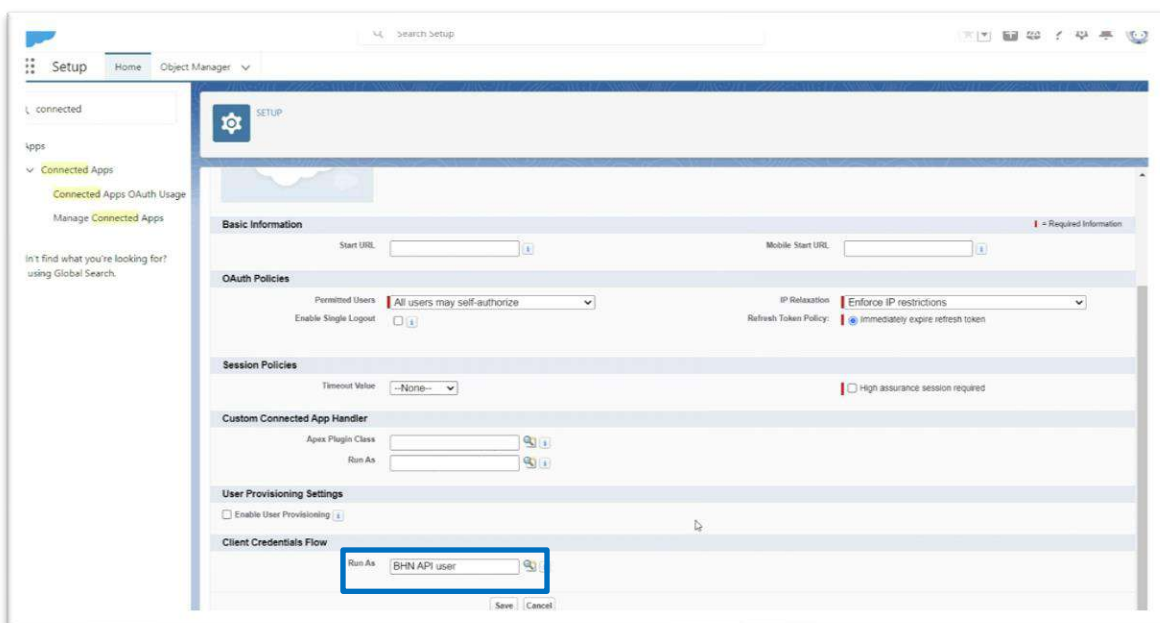
- Along with “Consumer key” and “Consumer Secret”, provide the Salesforce org URL, which you can find in the profile section to BHN Rewards Admin, in the below format.
<https://<SF org URL details from the profile section>>



13. In the Setup menu section- go to “Manage Connected Apps”. Click on Edit- “BHN Connected App”



14. In the client Credentials flow – Search and Map “BHN API User” to the “Run As” field. Click on Save



2.5 Add BHN Rewards components to a Salesforce Record Page Layout

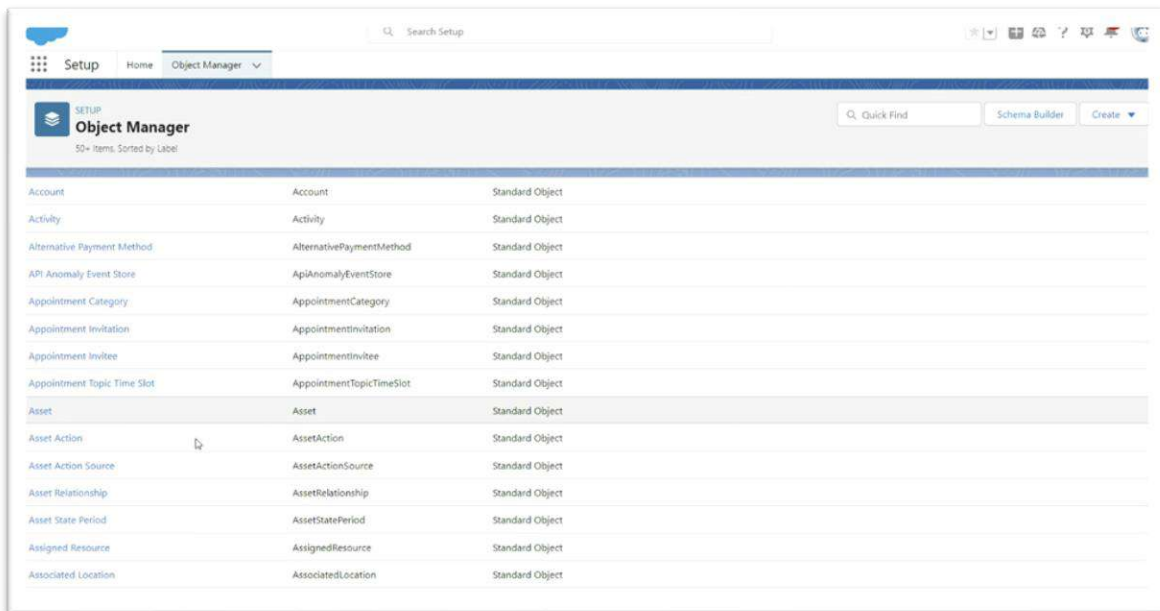
BHN Rewards app experience consists of 4 main components.

- “Reward with BHN” button
- BHN Rewards Activities in the related tab
- BHN Rewards Activities in the record page
- BHN Rewards Tracker Page

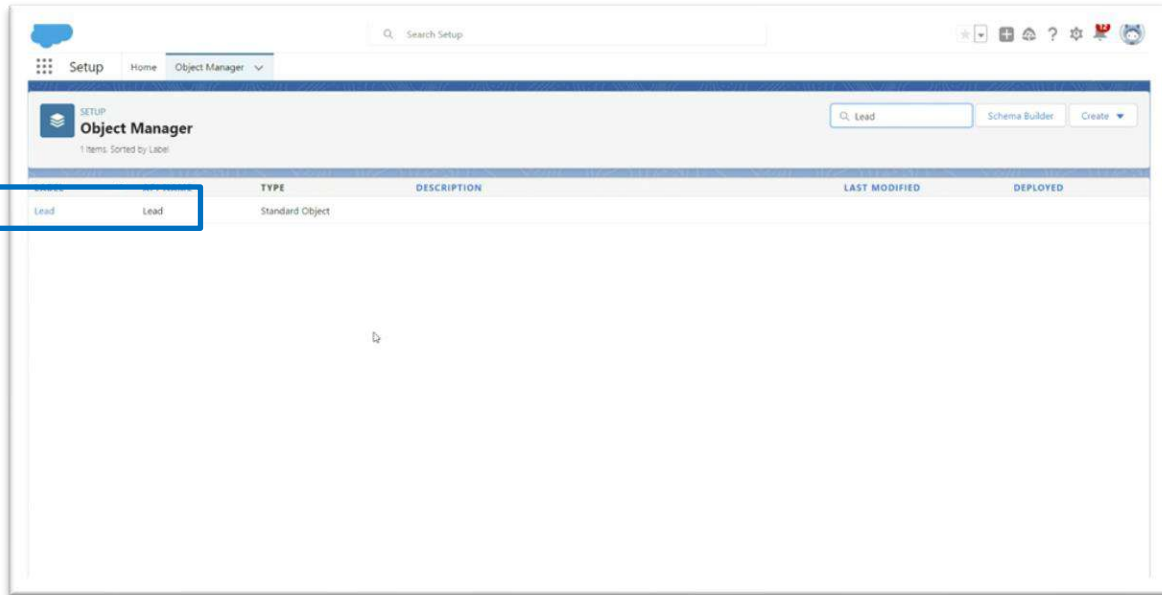
Each of these components can be placed in the “Lead”, “Contact” and “Case” object record page. Follow the below steps to place it in the respective “Object – Record Page”. The steps are same for all the 3 Objects.

Steps to Add “Reward with BHN” button to “Leads” Object

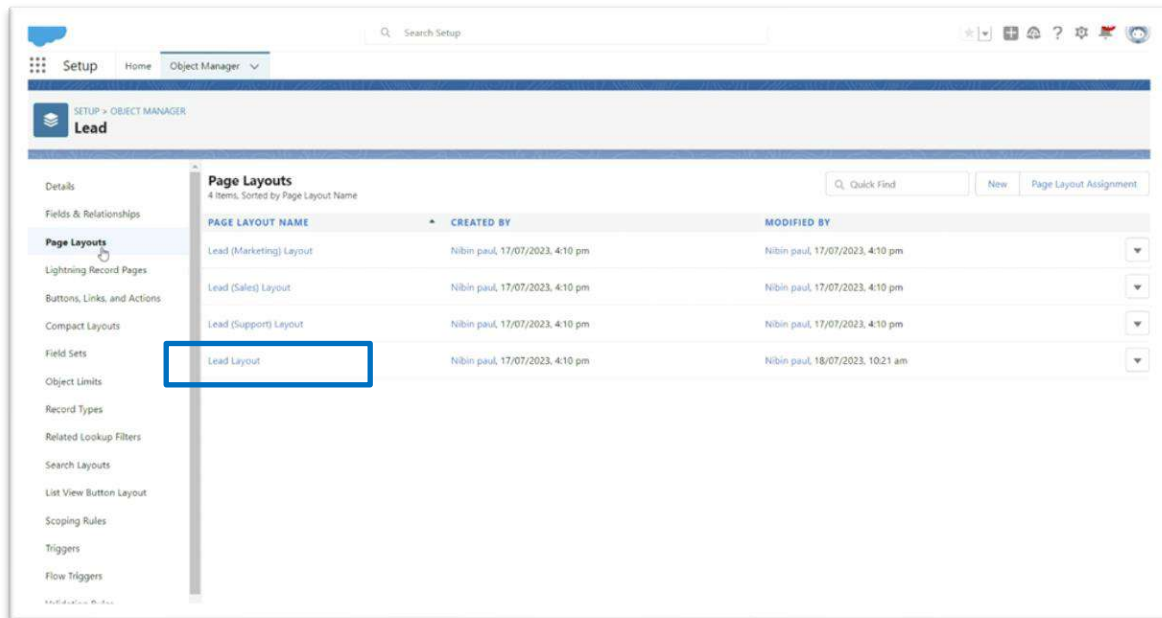
1. In the Setup Section- Open Object Manager

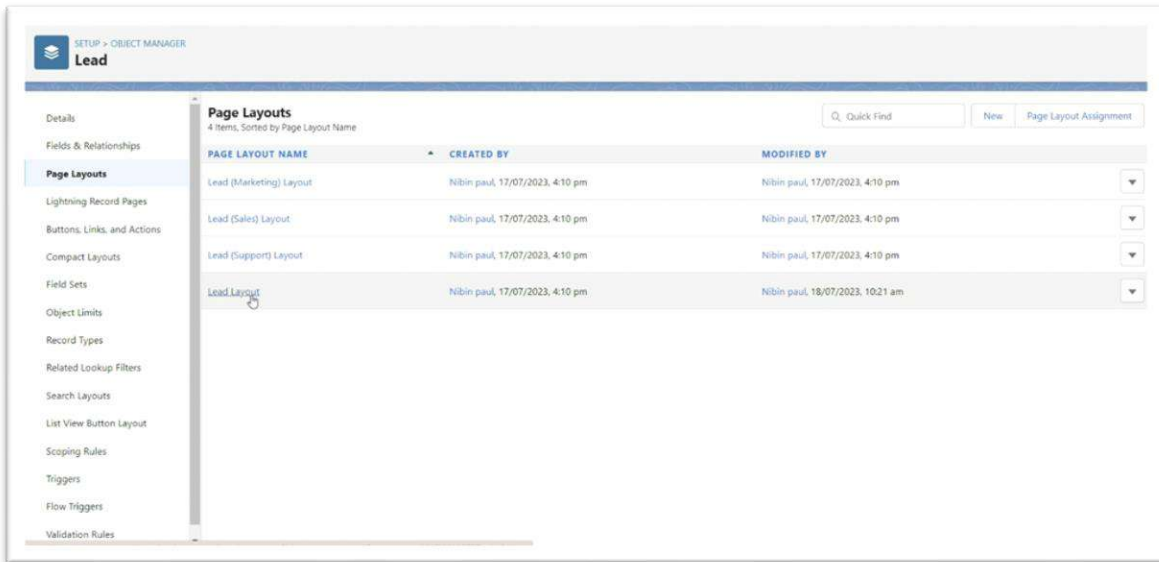


2. Search “Lead” in the quick find search bar of Object Manager. Click on “Lead” object.

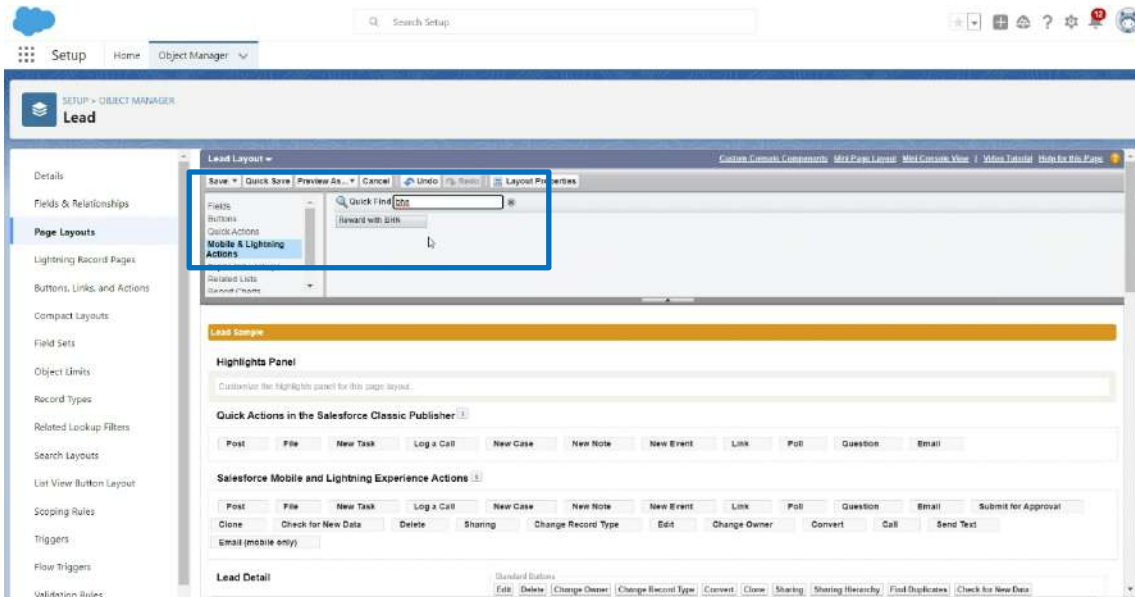


3. Click on “Page Layouts” and click on " Lead Layout.”

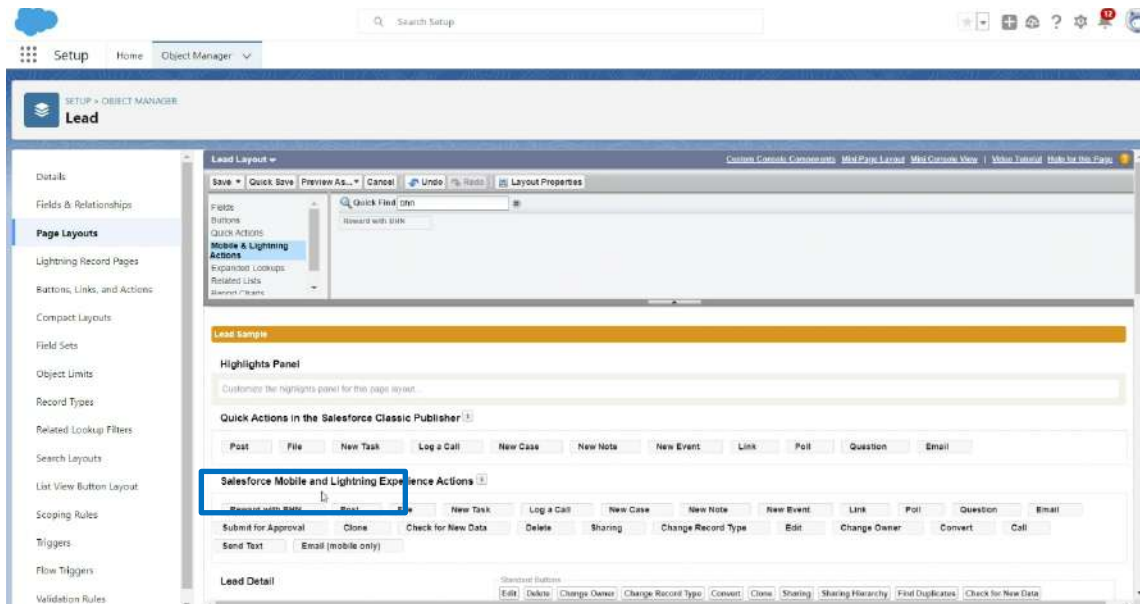




- Click on “Mobile and Lightning Actions, search “BHN” and find “Reward with BHN” button.



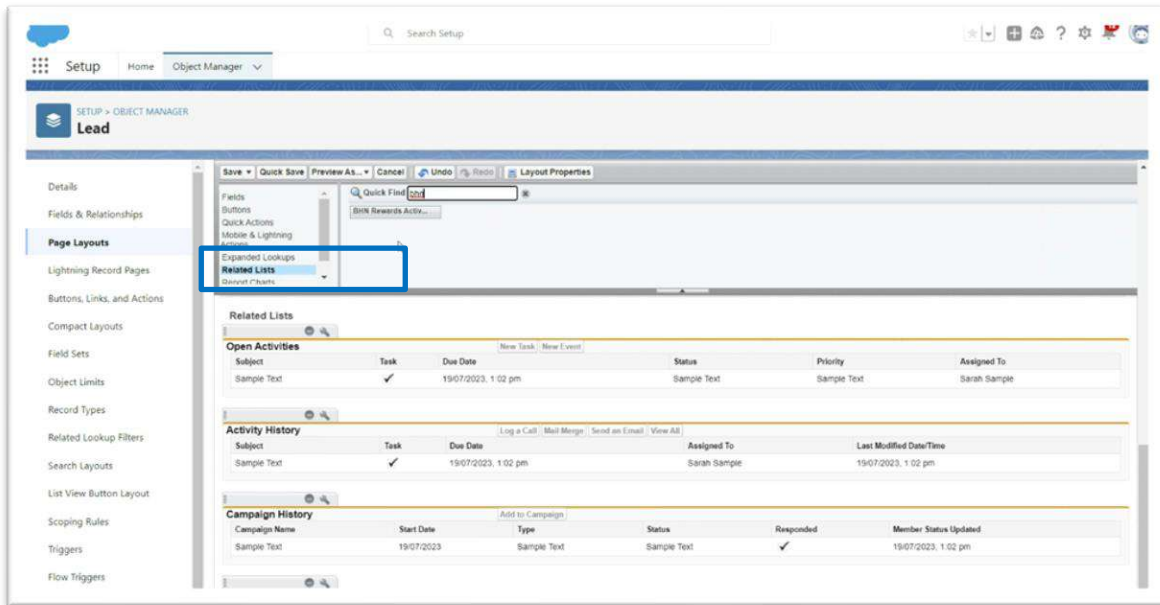
5. Drag and drop the “Reward with BHN” button into “Salesforce Mobile and Lightning Experience Actions” Section.



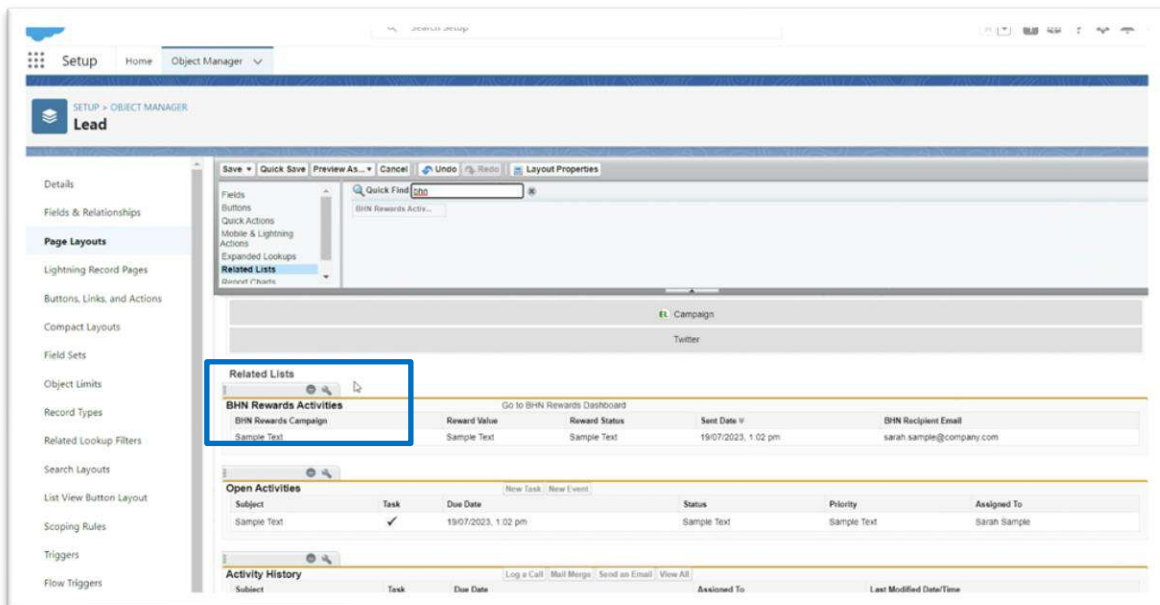
Repeat the above steps for “Contact” and “Case” object to add “Reward with BHN” button in the “Contact” and “Case” object to respectively.

Steps to Add “BHN Rewards Activities” in the Related list of “Leads” Object

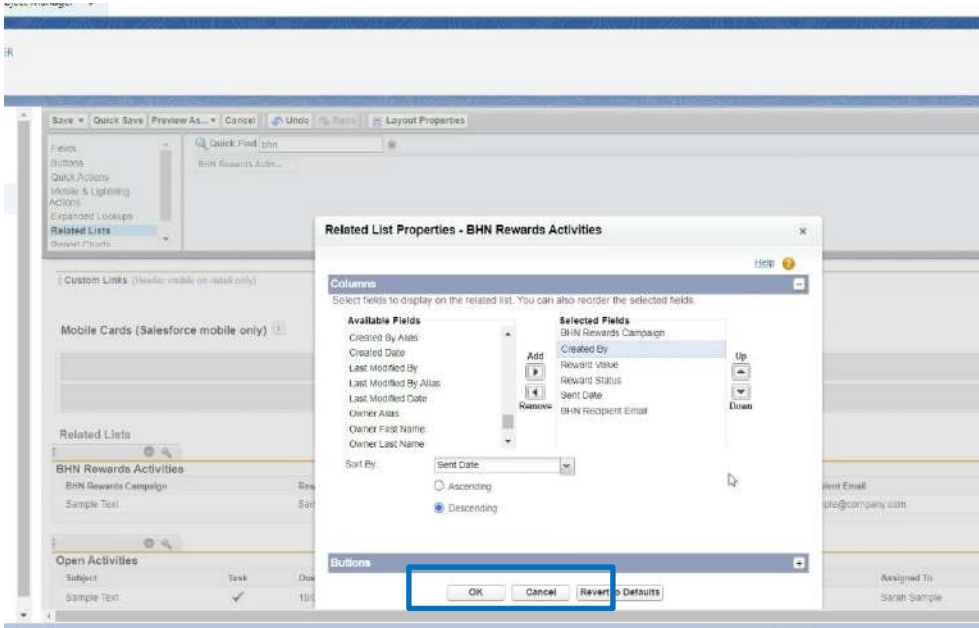
1. In the “Lead Layout” page, click on “Related List.”. Search and find – “BHN Rewards Activities.”



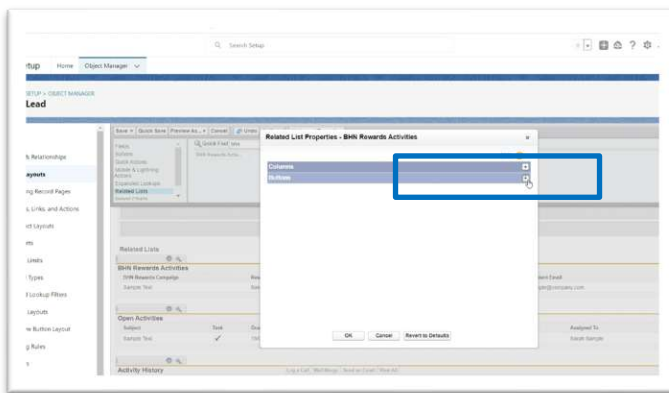
2. Drag and drop the “BHN Rewards Activities” to Related list section.



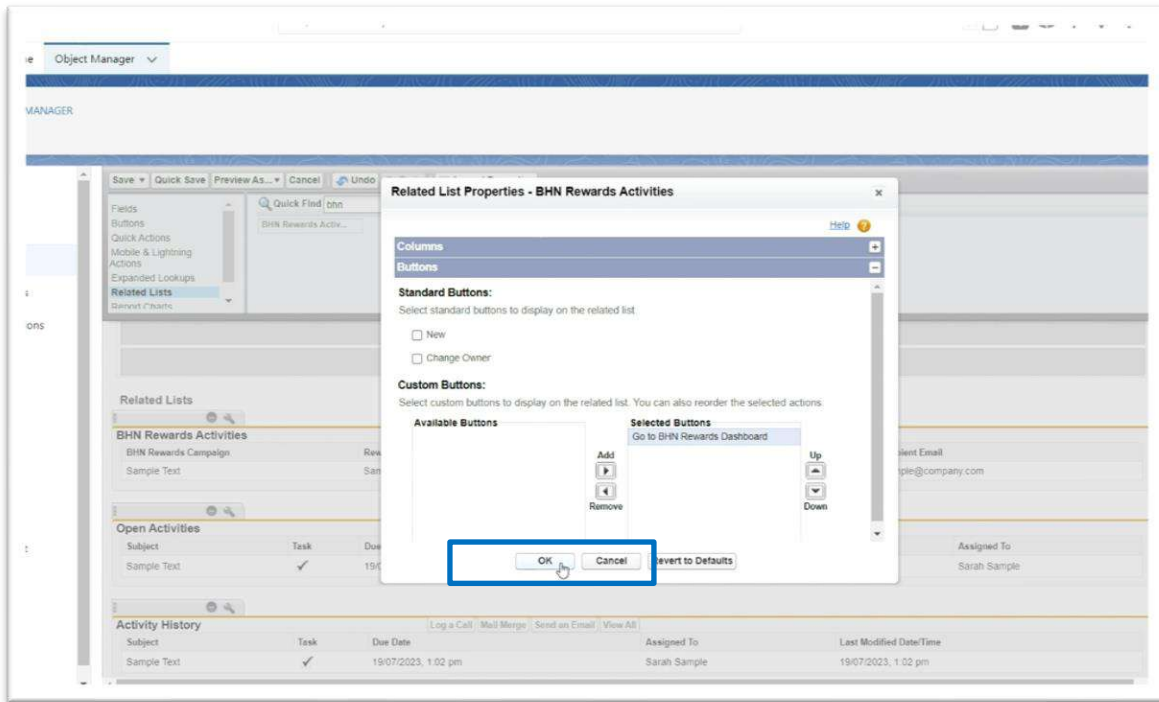
3. To configure this list, click on the wrench icon. Make sure to add the below fields into selected fields from the available fields and arrange the order also. Then Click on “OK”
 - BHN Rewards Campaign
 - Created By
 - Reward Value
 - Reward Status
 - Sent Date
 - BHN Recipient Email



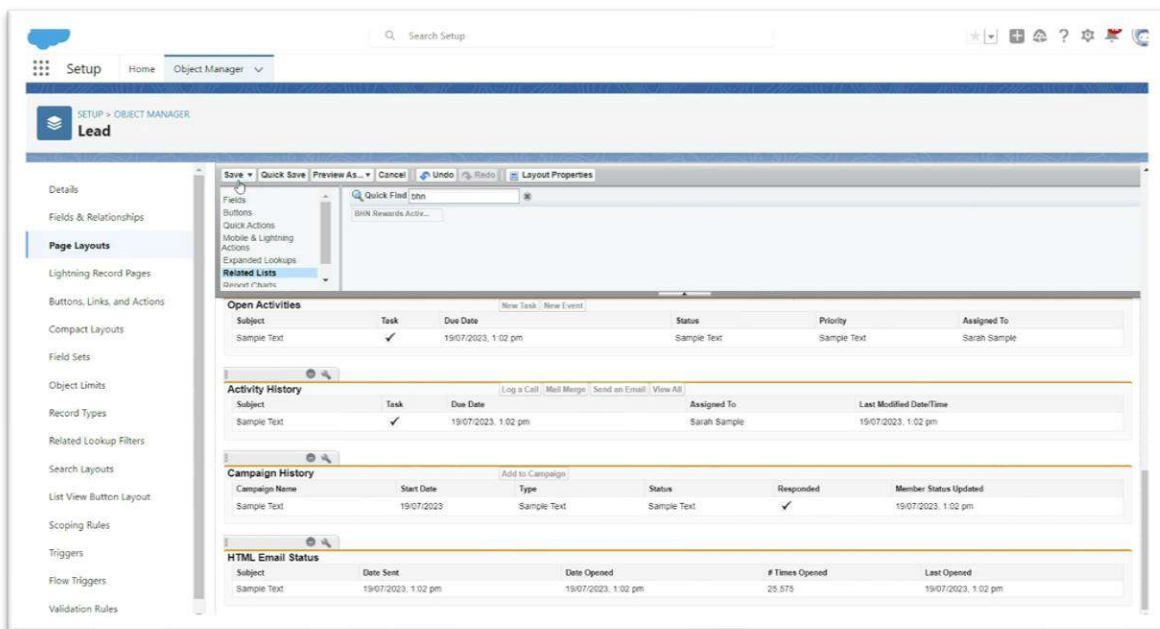
4. Next expand the Buttons tabs by clicking on “+”.



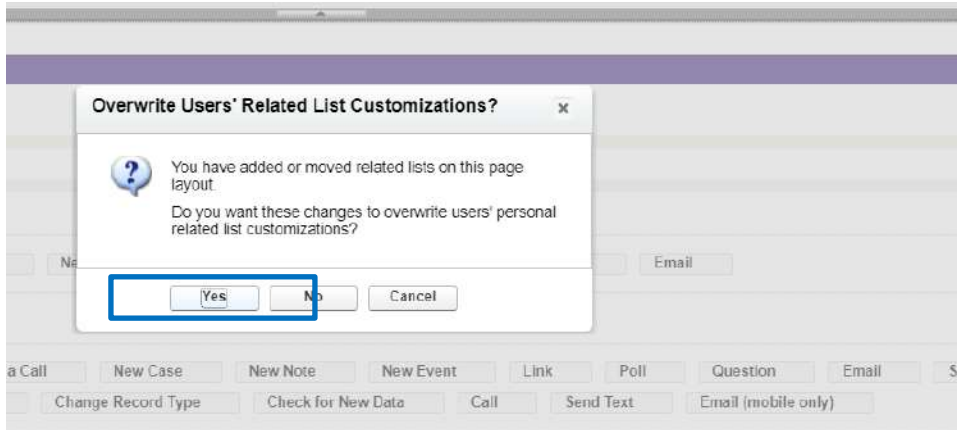
5. Add the “Go to BHN Rewards Dashboard” button to Selected button box. Uncheck the “New” and “Change Owner” check box. Click “OK”



6. Click on ok to save the changes made to the related list.



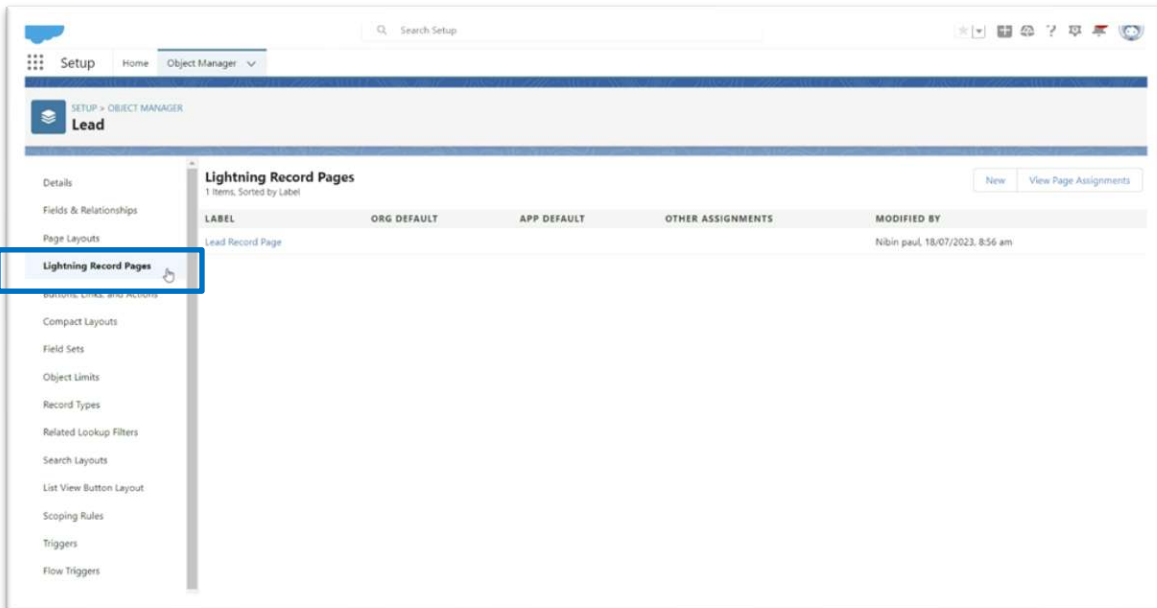
7. Click save to save the layout. Confirm the popup by clicking yes.



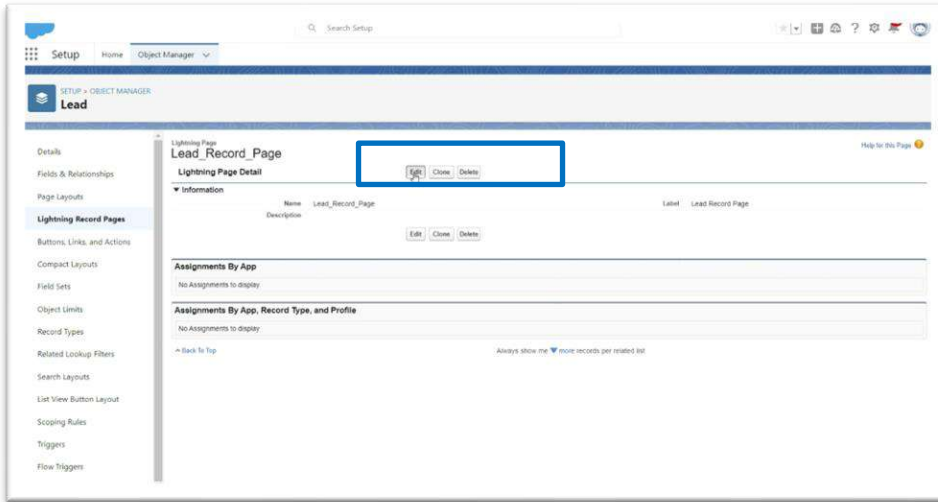
Repeat the above steps for “Contact” and “Case” object to add “BHN Rewards Activity” related tab the “Contact” and “Case” object respectively.

Steps to Add “BHN Rewards Activity Timeline” in the “Leads” Object

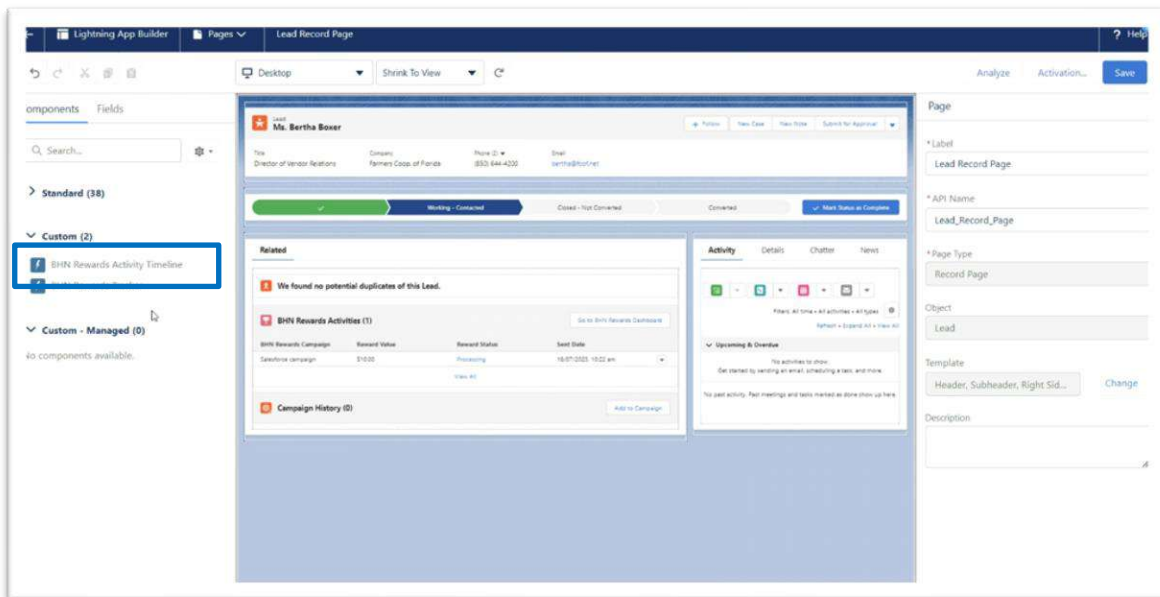
1. In the setup-> Object manager -> “Lead Object”, Click on “Lead Record Page.”

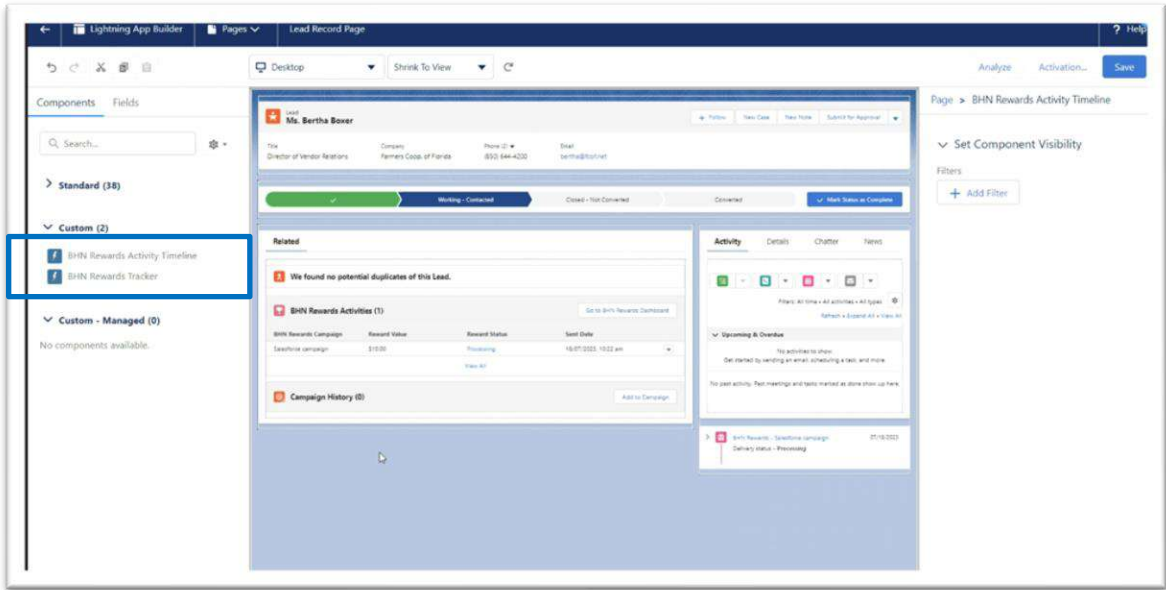


2. Click on “Edit”

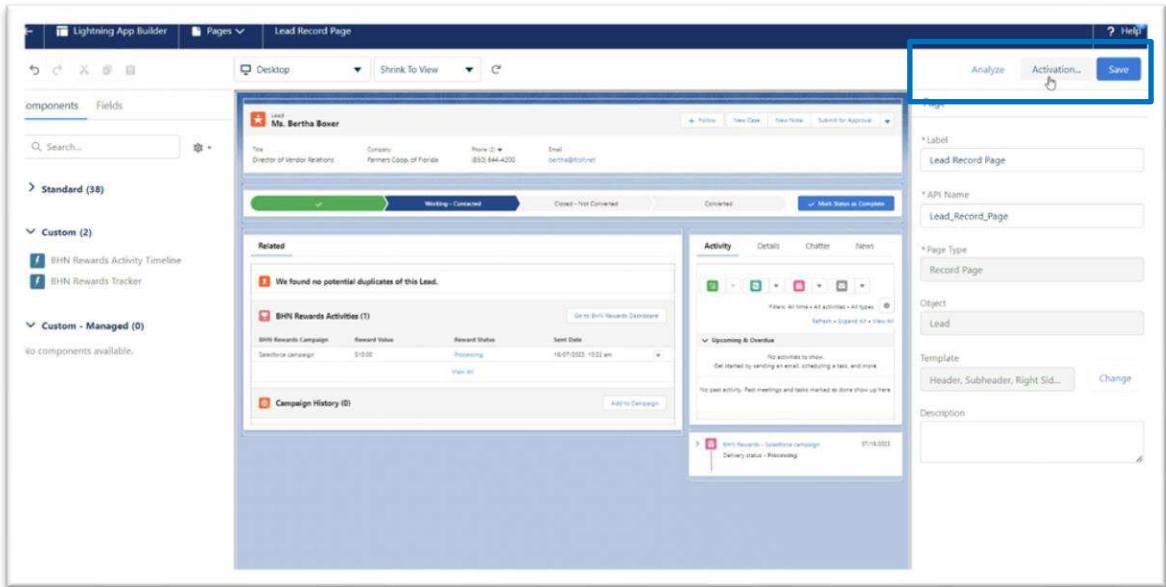


3. In the custom components section, in the right vertical section, Drag and drop the “BHN Rewards Activity timeline” to the “Lead record page editor.”

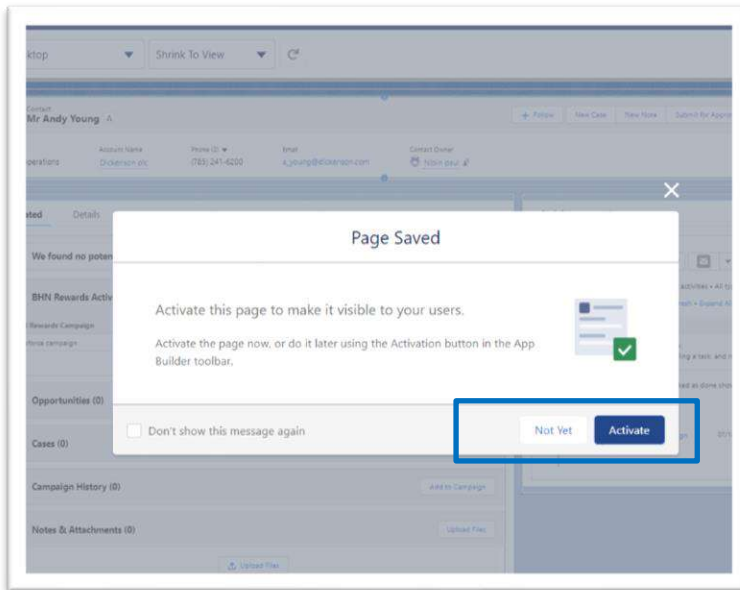




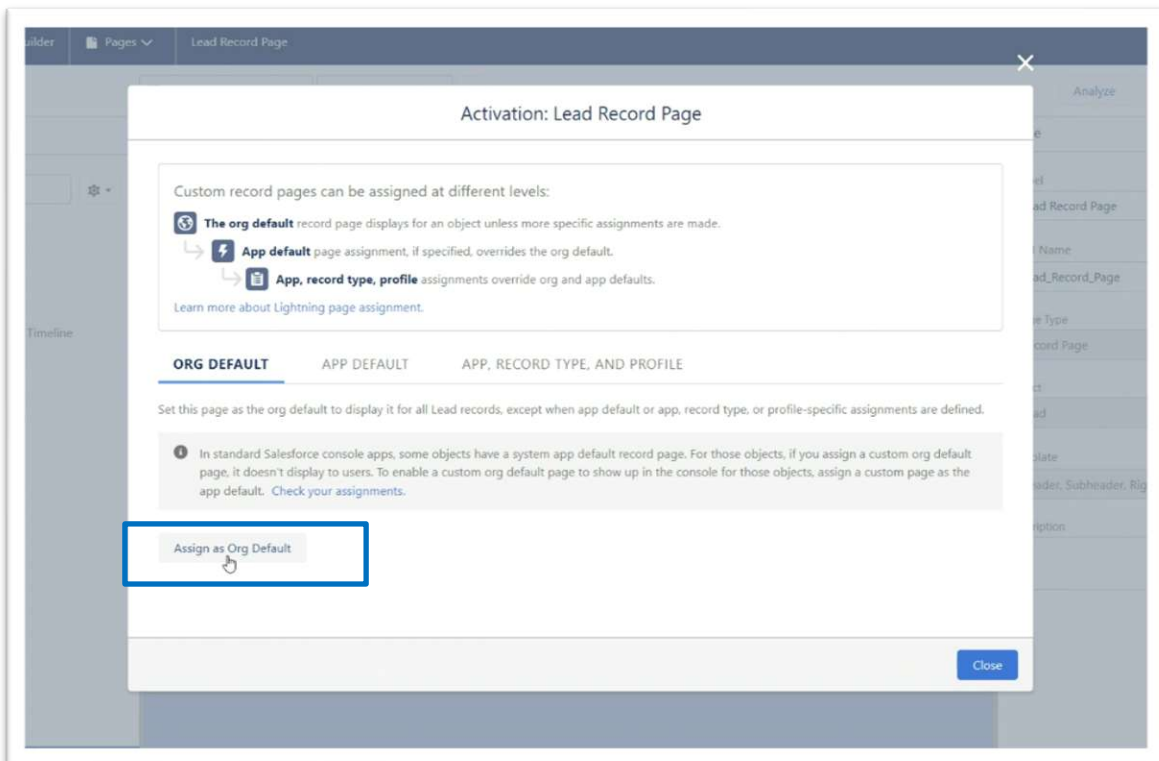
4. Click on "Save" and then "Activation"



5. Click on "Activate" on the confirmation pop up



6. Click on "Assign as Org Default"



7. Select "Desktop and Phone" and click Next

Assign form factor

Select the form factors that you want your org default page to be available for.

Desktop

Phone

Desktop and phone

Cancel Back Next

8. Review assignment and click save.

Review assignment

Review Assignments (2)

Form Factor	Current Org Default	New Org Default
Desktop	System Default	Lead Record Page
Phone	System Default	Lead Record Page

Cancel Back Save

Repeat the above steps for "Contact" and "Case" object to add "BHN Rewards Activity Timeline" to the "Contact" and "Case" object respectively.

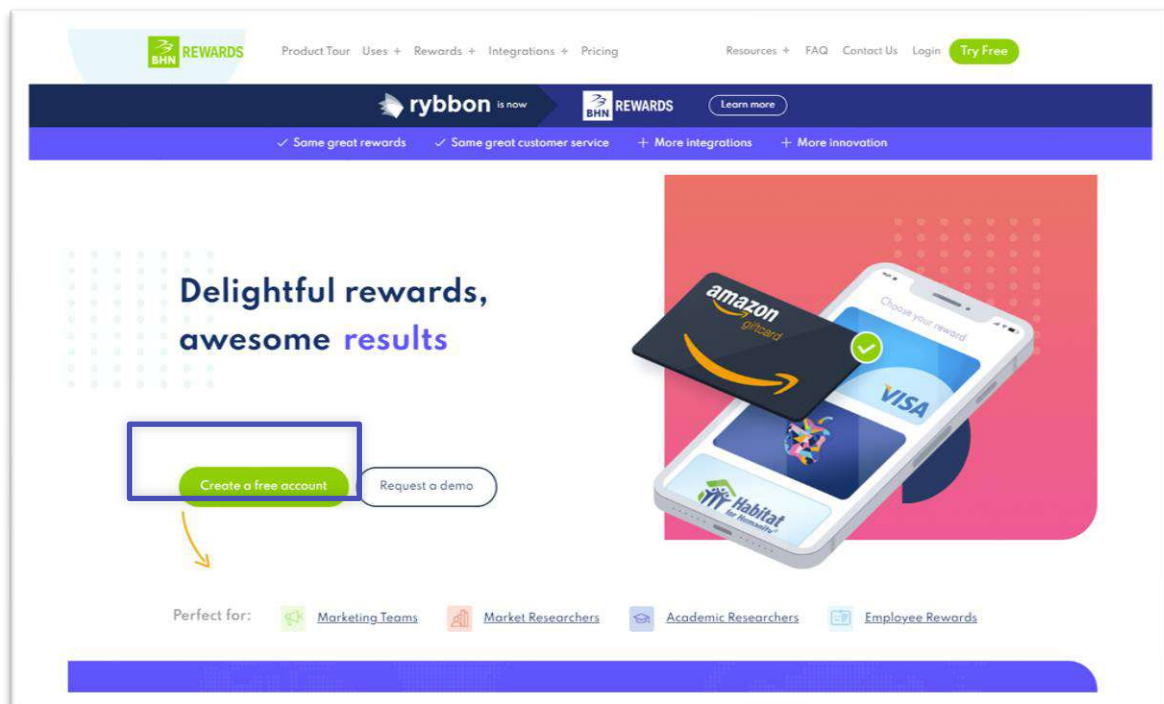
3. Deployment guidance for BHN Rewards Admin users

3.1 Prerequisites

- Active Salesforce account for the organization

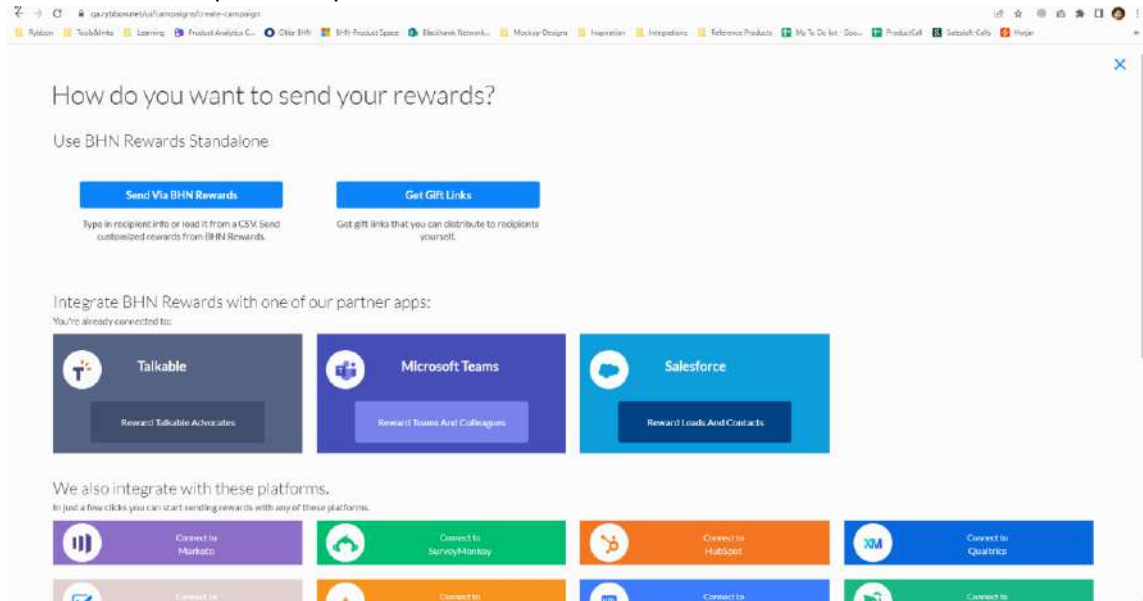
3.2 Sign Up for a BHN Rewards Account and Create Your First Campaign

1. To get started with BHN Rewards for Salesforce, you need an active BHN Rewards Account. Create one by clicking on the “Create a free Account” button on the bhnrewards.com homepage.

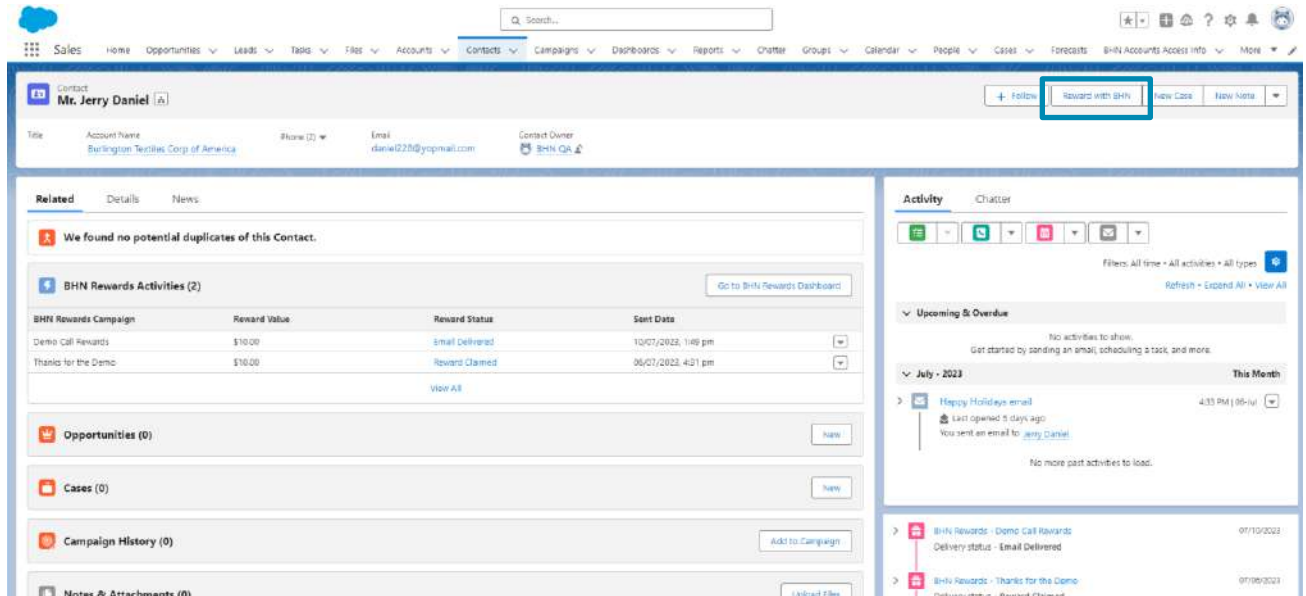


2. The new BHN Rewards account creation page will open in a browser.
3. Sign up for the BHN Rewards account preferably using the same work email address that you have used for your Salesforce account.
4. Create your first Salesforce reward campaign in BHN Rewards by following these steps: Click “New Campaign”, select Salesforce as your integration, name your campaign, choose your reward amount, populate with custom fields (optional), set recipient

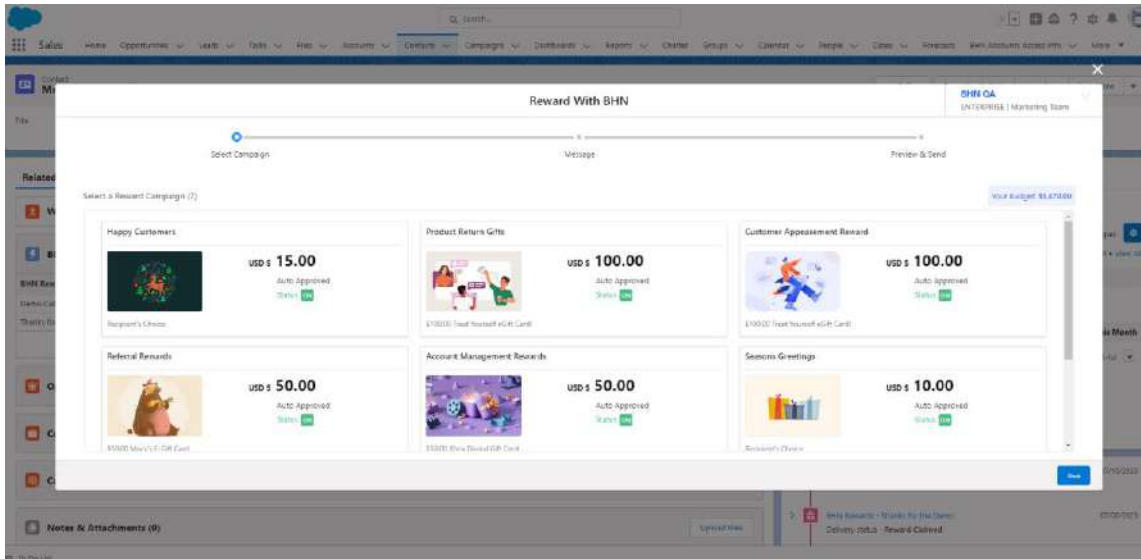
approvals, customize reward card, customize reward redemption page, set up budget controls and complete setup.



1. Return to BHN Rewards App in Salesforce, go to – Sales Cloud – “Lead Object page / Contact Object Page”, Click on “Reward with BHN.”



5. The Salesforce Reward campaign that is created in BHN Rewards will be available in the BHN Rewards for Salesforce app for sending out rewards.



3.3 Add Funds to your BHN Rewards Account

BHN Rewards provides multiple options to fund your reward orders.

First option is to **pre-fund** your BHN Rewards cash pools via bank transfer. It enables your orders to be processed immediately. When you add funds in advance to your campaign, BHN Rewards will draw from these funds and process your orders as they come in.

Second option is to **place an order** first and then send a payment via bank transfer to activate your campaign.

The last option is to use a **corporate credit card**. There is a 3% processing fee and adding a corporate card to your account does require approval by our risk and compliance team.

Our recommendation is to use ACH/Bank Transfer as the most secure, preferred option for BHN Rewards and our customers. Due to security compliance measures, corporate credit cards have a \$10,000 spend limit (including the 3% processing fee) per 90 days.

3.4 Create Budget Groups in BHN Rewards

Available only to BHN Rewards' Enterprise Subscription plan customers

BHN Rewards allows you to control the dollar spent on rewards by your organization's users by setting up budget groups and assigning users to these groups. Budget groups in BHN Rewards must be created to reflect your organization's classification of spend groups. For example, a company may have a monthly reward budget of \$1,000.00 for Account Managers with Accounts less than 50 accounts and \$2,000.00 for team size greater than

50 Accounts. This budget policy will translate to two budget groups in BHN Rewards, one for Managers with less than 50 accounts and the other for more than 50 accounts.

To create budget groups, follow these steps: Hover over your name in the right-hand corner and click Budget Groups, click “Add New Budget Group,” write in your Budget Group Name, apply user spend limits, determine the budget amount, then click “Create Budget Group.”

Add a New Budget Group

Budget Group Name:

Apply User Spend Limits: YES Yes, set a budget limit for members of this group.

Budget Amount:

Reset Frequency: ⓘ

The budget amount will be reset the first day of every month.

[Create Budget Group](#)

3.5 Invite Reward Senders to BHN Rewards

As a BHN Rewards Admin user, you can invite your organization’s Salesforce users to BHN Rewards. Users who are invited as Campaign Managers or Reward Senders can send rewards using the BHN Rewards app in Salesforce. It’s advisable to make sure that you are sending out invites to work emails and the email used for invite is same as that used for Salesforce account. Also, when you are inviting a user, you will get the option to add the user to the right budget group. ([When should a user be invited as a campaign manager?](#))

To invite users to BHN Rewards, follow these steps: Hover over your name in the right-hand corner and click User Accounts, click “Invite New User,” then fill out the new user’s information and click “Send Invitation.”

Invite a New User

First Name: Last Name:

Email Address:

Department: Job Role:

User Role

Account Admin Standard User

User in an Account Admin role can perform all action in all workspace of the account

Budget Group

Spending limit of the user is applicable across all workspace that the user has access to.

Default Budget Group:

Budget Amount	Budget Balance	Reset Frequency	Next Reset Date
No limits apply	No Limits Apply		

Invited users will receive an email with instructions to create their account in BHN Rewards. Once the invited users create the account, they can login to the BHN Rewards app in Salesforce using the same credentials and get started on sending rewards.

3.6 Frequently Asked Questions

What is a Salesforce reward campaign in BHN Rewards?

A reward campaign is an organized way of sending rewards to recipients. Within each campaign, you can preconfigure the digital rewards, reward value, program budget, recipient experience, and redemption time frame. For example, you could create a Salesforce reward campaign called “Discovery Call Rewards” in BHN Rewards and use it for Lead Nurturing purpose via BHN Rewards app in Salesforce.

When should a user be invited as a campaign manager?

A user should be invited to BHN Rewards as a Campaign Manager if you want the person to create and manage reward campaigns in BHN Rewards. As a campaign manager, the user will also have the privilege to place reward orders and approve or reject recipients who are placed in the approval queue.

Can I set up Single Sign-On (SSO) in BHN Rewards for my organization’s users?

Yes, BHN Rewards SSO works with all Identity Providers that support the SAML 2.0 protocol, including Okta. Okta, OneLogin, and Azure AD are certified by the BHN Rewards internal team. If you want to use any other identity provider, we recommend following specific setup instructions provided by the identity provider to ensure the SSO is set up correctly. For more details on how to set up SSO in BHN Rewards read this [help article](#).

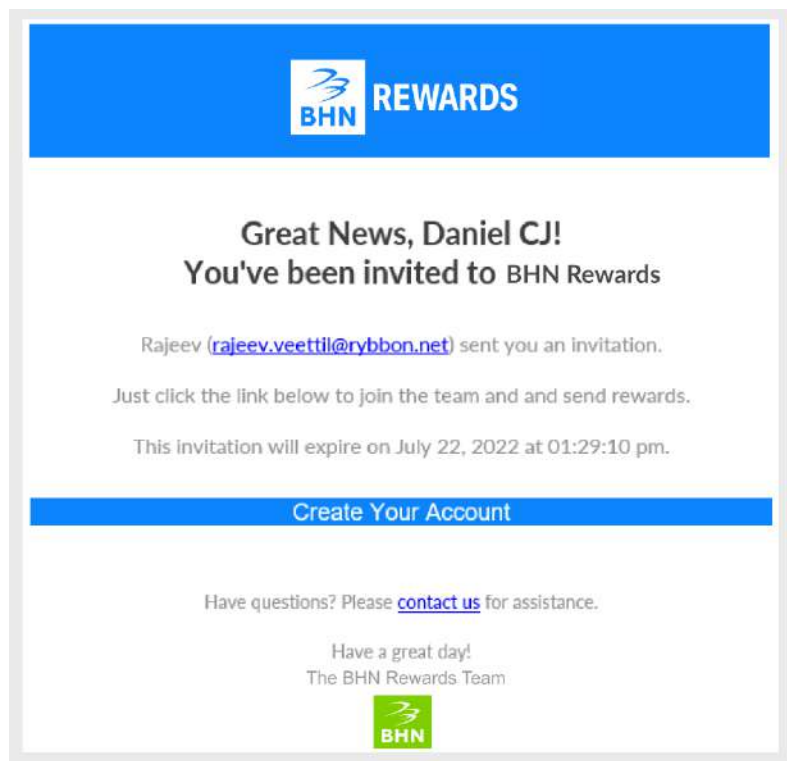
4. Deployment guidance for BHN Rewards Campaign Manager users

4.1 Prerequisites

- Active Salesforce account
- Active BHN Rewards account for your organization.
- Received an invitation to your work email to create a user account in BHN Rewards

4.2 Accept the Invitation to join the BHN Rewards team.

Every BHN Rewards account will have at least one user with Admin privileges. Only an admin user can invite Campaign Manager users into the organization's BHN Rewards account. You must first create your user account in BHN Rewards before you can start using the BHN Rewards for Salesforce. Please make sure that you have received an email invitation from your organization's BHN Rewards Admin to create your user account with BHN Rewards. Click on the "Create Your Account" button in the invitation email and complete the user account creation steps.



In case you have not received the invitation please reach out to your BHN Rewards Admin. **Please do not use the "Create a BHN Rewards Account" in the BHN Rewards website as it initiates an account creation flow for your organization. Only BHN Rewards Admins are required to create a new BHN Rewards account.**

4.3 Create a campaign.

A Campaign Manager can create new campaigns in BHN Rewards. Once you have created your user account, follow these steps to create a Salesforce campaign in BHN Rewards.

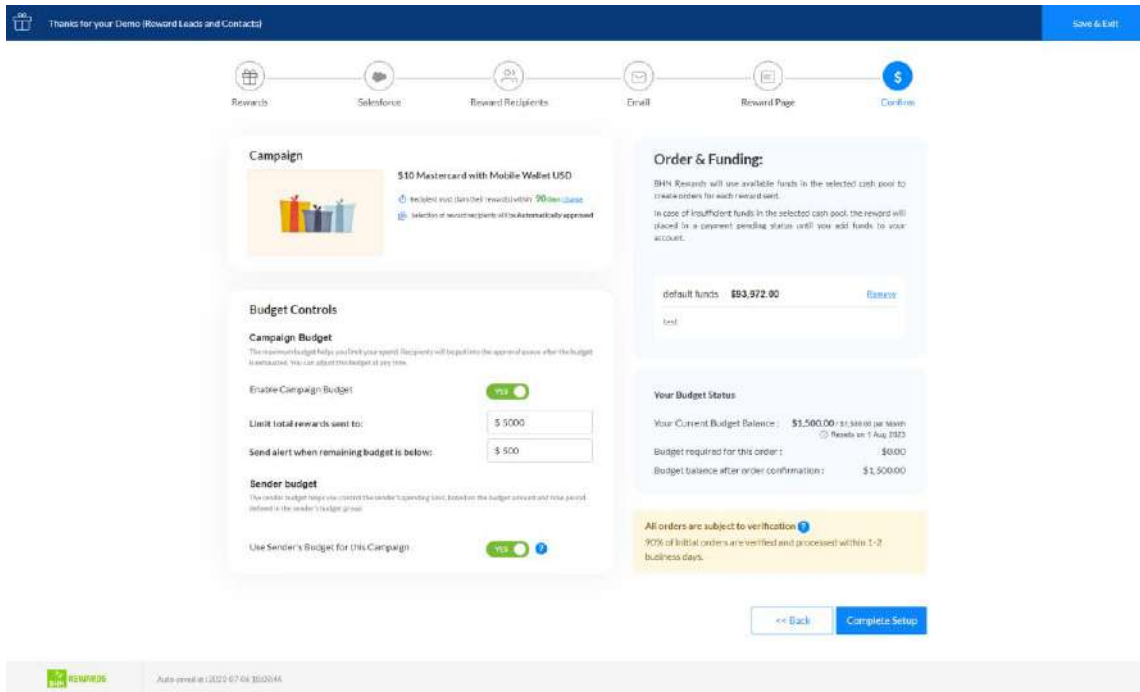
Click “New Campaign”, select Salesforce as your integration, name your campaign, choose your rewards, and reward amount, populate with custom fields (optional), set recipient approvals, customize reward card, customize reward redemption page, set up budget controls and complete setup.

The screenshot shows the 'Campaign Setup' page in the BHN Rewards system. At the top, a navigation bar includes a 'Save & Exit' button and a breadcrumb trail: 'Thanks for your Demo (Reward Loads and Contacts)'. Below the navigation bar is a progress indicator with six steps: Rewards, Salesforce, Reward Recipients, Email, Reward Page, and Confirm. The 'Campaign Setup' section contains a 'Campaign Name' field with the value 'Thanks for your Demo' and a 'Folder (Optional)' dropdown menu set to 'Select a folder', with a 'Create Folder' button next to it. Below this is the 'Your Reward Selection' section, which includes a 'Select Reward' button and a small bar chart icon. At the bottom, there is a section titled 'Where do your recipients reside?' with a brief explanatory text.

4.4 Setup budget controls

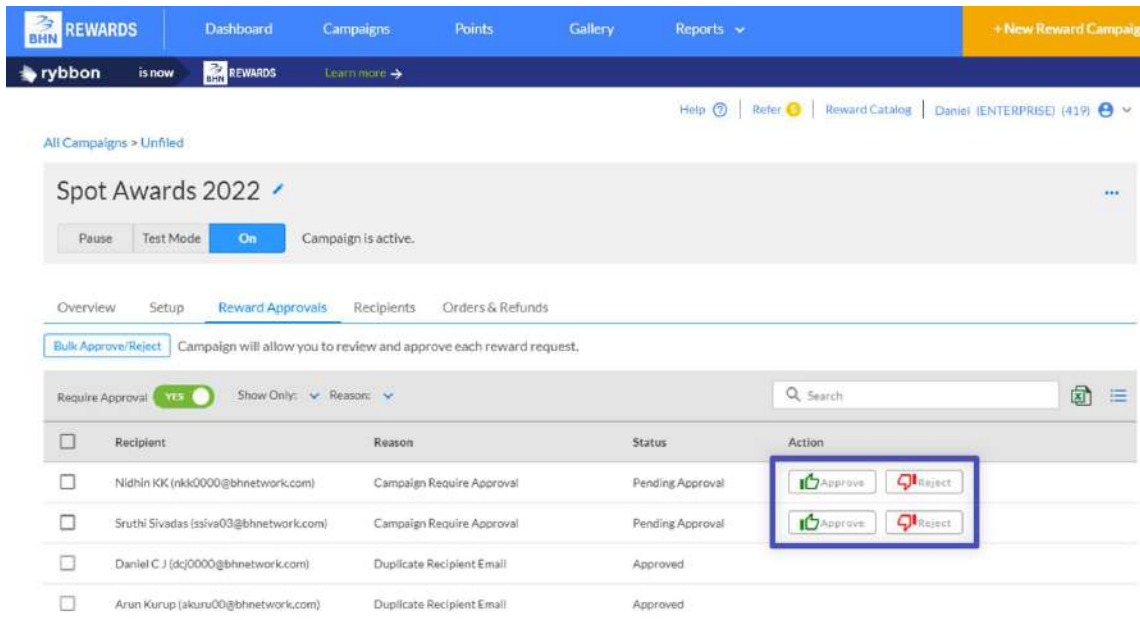
For a Salesforce campaign in BHN Rewards, you can set up reward spend limits for Reward Senders as well as the campaign. Follow these steps detailed below to configure budget controls.

On the **Confirm** page, set your max campaign budget, and alert threshold. Then turn Sender Budget to YES to use the sender’s budget balance for all rewards sent from this campaign. Set this to NO if you don’t want to use the sender’s budget balance.



4.5 Approve Recipients

As a campaign manager, you can review the recipients who are added to a Salesforce campaign. The approval settings in the campaign will allow you to set up criteria that trigger recipient approval.



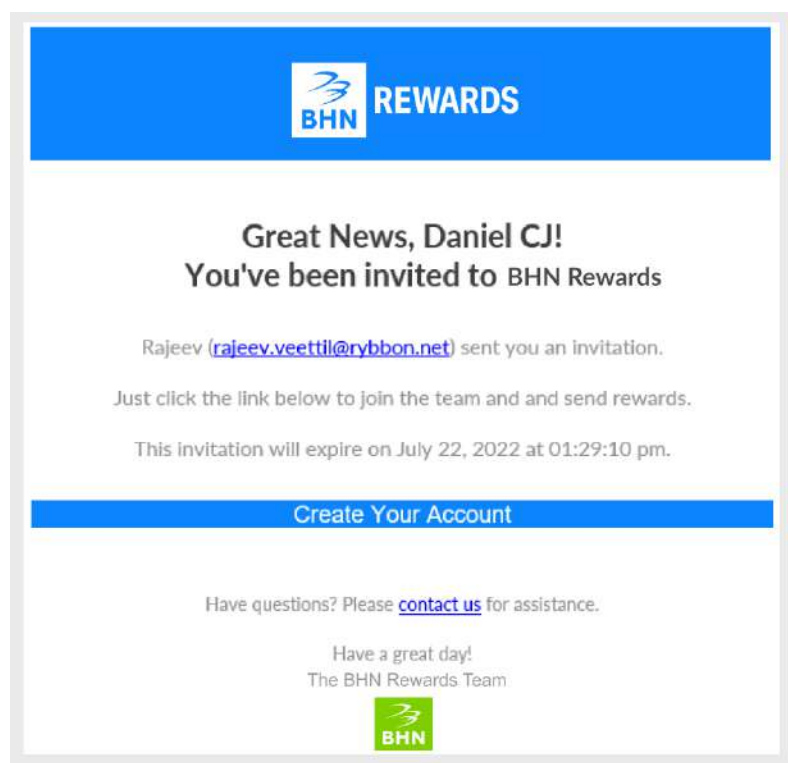
5. Deployment guidance for BHN Rewards Sender users

5.1 Prerequisites

- Active Salesforce account
- Active BHN Rewards account for your organization.
- Received an invitation to your work email to create a user account in BHN Rewards

5.2 Accept the Invitation to join the BHN Rewards team.

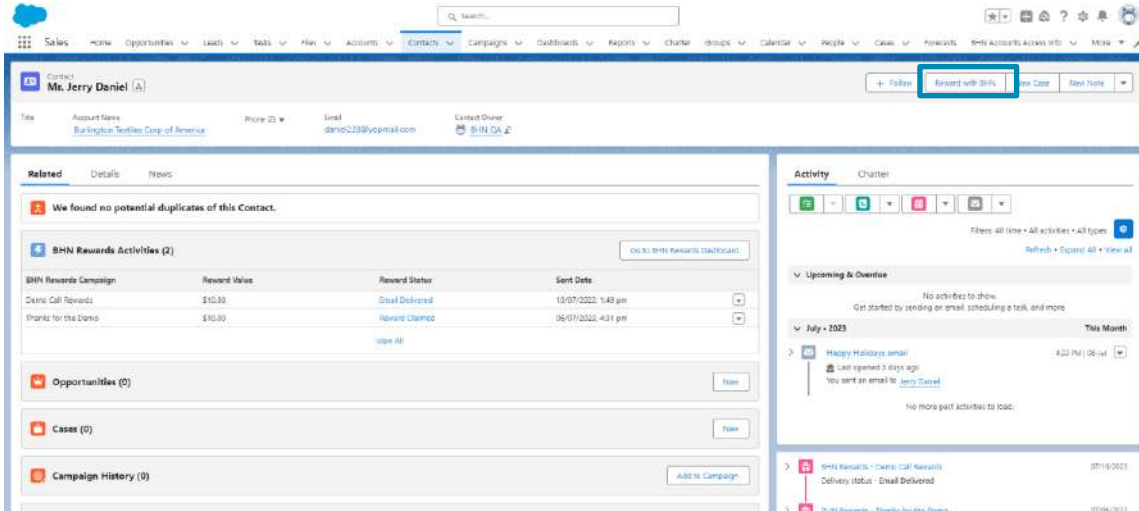
Every BHN Rewards account will have at least one user with Admin privileges. Only an admin user can invite Reward Sender users into the organization's BHN Rewards account. You must first create your user account in BHN Rewards before you can start using the BHN Rewards for Salesforce. Please make sure that you have received an email invitation from your organization's BHN Rewards Admin to create your user account with BHN Rewards. Click on the "Create Your Account" button in the invitation email and complete the user account creation steps.



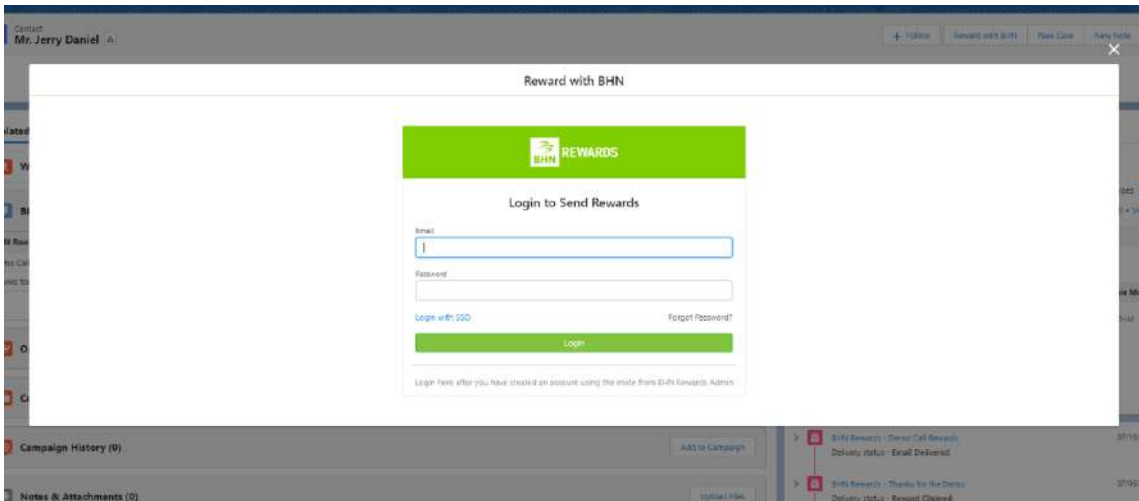
In case you have not received the invitation please reach out to your BHN Rewards Admin. **Please do not use the "Create a BHN Rewards Account" as it initiates an account creation flow for your organization. Only BHN Rewards Admins are required to create a new BHN Rewards account.**

5.3 Sign into BHN Rewards for Salesforce

1. Go to your Salesforce Platform
2. Enter your Salesforce login credentials.
3. Go to Sales cloud "Lead / Contact object", Click on "Reward with BHN."



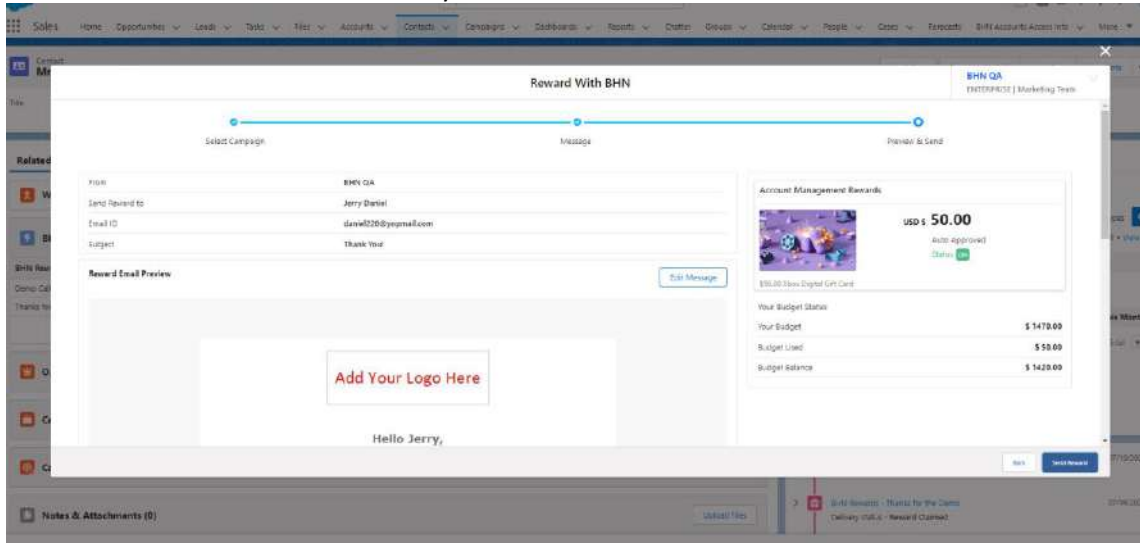
4. Enter your "BHN Rewards Account" credentials to login and connect



5.4 Send Rewards using BHN Rewards app in Salesforce.

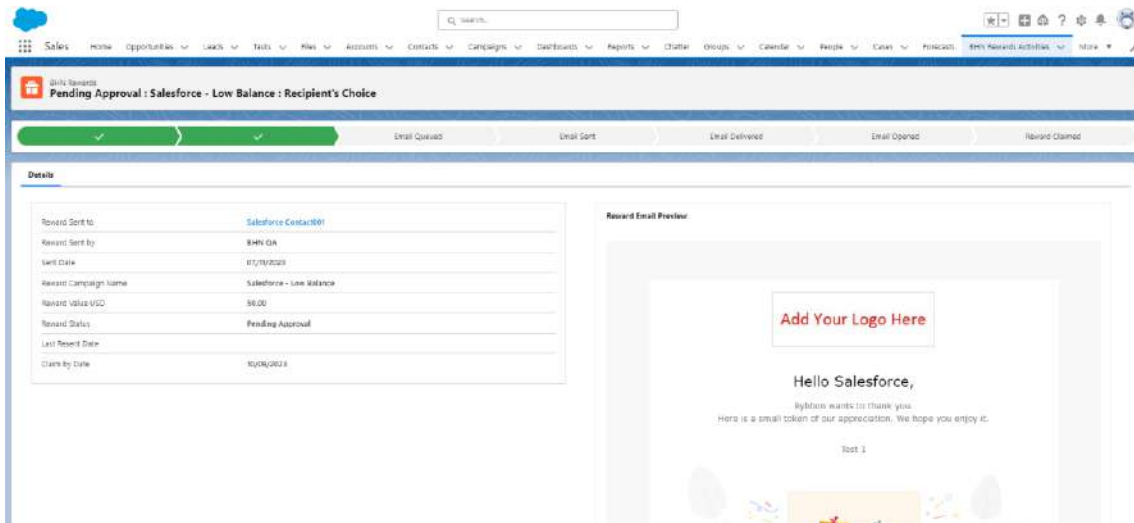
Follow these steps to send rewards using BHN Rewards. Make sure the Salesforce Admin has installed and configured the BHN Rewards app in the Organization's Salesforce account.

In the Lead object / Contact object page, click on the "Reward with BHN" button, then select the reward campaign you want to use, add a note, preview, and click "Send Reward" to send the reward instantly.



5.5 Track Rewards Delivery Status in Salesforce

In the Lead/ Contact "related" tab view all rewards sent and the latest delivery status.



5.6 Frequently Asked Questions

What is a reward campaign and how do I create one?

A reward campaign is an organized way of sending rewards to recipients. Within each campaign, you can preconfigure the digital rewards, reward value, program budget, recipient experience, and redemption timeframe. For example, you could create a reward campaign called “Demo Meeting Reward” to use for Lead Nurturing.

Only BHN Rewards Administrators and Campaign Managers can create and modify reward campaigns via the BHN Rewards application.

Which campaign should I select to send rewards?

You can select any reward campaign available in your BHN Rewards for Salesforce app. Confirm with your company’s BHN Rewards Admin to clarify the purpose of each campaign, to select the campaign best suited for the reward you want to send.

Why can’t I view any reward campaign in my BHN Rewards for Salesforce App

You can only view active reward campaigns in the BHN Rewards for Salesforce app. Only BHN Rewards Admins or Campaign Managers at your organization can create BHN Rewards reward campaigns. Contact your BHN Rewards admins to create a reward campaign for you.

How do I buy digital rewards to send out?

When sending out a digital reward via Salesforce you will not have to buy digital rewards. You will use the rewards available in your reward campaign. The BHN Rewards Admin or Campaign Manager handles the purchasing of rewards when creating a reward campaign within the BHN Rewards platform.

How many rewards can I send?

The number of rewards you can send is set by your BHN Rewards Admin. Please contact your Admin to see how many rewards you can send out each month. If you send rewards after reaching your budget limit, your BHN Rewards Admin will need to approve the reward before it gets sent to your recipient.

Can I set the reward value?

If your BHN Rewards Admin has created a reward campaign with variable rewards, then you can set the reward value.

My budget is low. How do I add more budget?

Only your BHN Rewards Admin has permission to update budgets. You may wait for the reset period or contact your Admin.

Can I send a reward if I have insufficient or no budget balance?

Yes. You can send a reward with insufficient or no budget, but the reward will require exceptional approval from your organization's BHN Rewards Admin. Rewards will be sent out only if the BHN Rewards Admin approves your reward request.

What happens if the campaign runs out of budget?

If the campaign runs out of budget, the reward requests will be placed in the approval queue of the BHN Rewards Admin of your organization. Once approved, the rewards will be sent out.

Can I rollover my leftover budget from my previous period to the next one?

No. Any remaining budget from a previous period cannot be rolled over into the next period.

How do I make a payment to purchase rewards?

Your BHN Rewards Admin or Campaign Manager will purchase the rewards via the BHN Rewards platform. There is no option to purchase rewards directly from the BHN Rewards for Salesforce app.

I sent a reward, but it is pending approval. What should I do now?

Track the latest status of the reward in the related tab of a Lead / Contact object. View all the rewards sent out. Once your BHN Rewards Admin approves, the rewards will be sent out.

I have sent a reward, but the recipient has not received the reward. What do I do?

There are two possible reasons:

1. You have insufficient funds, and the reward request is pending BHN Rewards Admin/ Campaign Manager approval. Once approved, the recipient will receive their reward.
2. The overall reward campaign has run out of funds. These rewards will be placed in an approval queue of the BHN Rewards Admin/ Campaign Manager. Once approved, the recipient will receive their reward.

	Salesforce Admin	BHN Rewards Admin	Campaign Manager	Reward Sender	Reward Recipient
Install BHN Rewards - Org wide	✓	×	×	×	×
Create a BHN Rewards Account	×	✓	×	×	×
Add Funds to BHN Rewards	×	✓	×	×	×
Create Budget Groups in BHN Rewards	×	✓	×	×	×
Enable Single Sign On (SSO)	×	✓	×	×	×
Invite Campaign Managers and Reward Senders to BHN Rewards	×	✓	×	×	×
Access BHN Rewards app in Salesforce	×	✓	✓	✓	×
Create BHN Rewards Campaigns	×	✓	✓	×	×
Setup Budget Controls	×	✓	✓	×	×
Approve Reward Recipients	×	✓	✓	×	×
Send Rewards from Salesforce	×	✓	✓	✓	×