

User Guide

THE SIGN-UP PROCESS

STEP 1:

Simple and Affordable Pricing

Once you pass the trial period, the system will recognise the number of employees you have and bill you accordingly based on the below pricing structure.

You are able to choose the Monthly Payment option, or receive a 20% Discount for an annual upfront commitment.

If you wish to have more than 250 users, please email us at hello@xtendsystem.com for accurate pricing. This however will not affect your trial period.

0 - 10 Users

\$10
Per Month
14 Day Trial For Free

10 - 250 Users

\$6
Per User Per Month
14 Day Trial For Free

250+ Users

Let's Talk
Over 250 Users? E-mail Us!

STEP 2:

User Details

Please provide us with the user details for your Program Manager account.

This user will have administration rights to the program.

E-mail *

First Name *

Last Name *

Contact Phone Number

Password *

Confirm Password *

STEP 3: Program Details

Name your Organisation / Business – We need to know where you are from.

Name your program – This can be as creative or as simple as you would like. You name just use your Organisation / Business name with 'Program' at the end. For example: 'The Xtend Program'.

Set your program sub-domain – This will dictate the sub URL the site is accessible by, usually this would be on a similar note to the program name. When you enter in your program name a suggestion will populate in this field. Please only change this field if you are unhappy with the suggestion made.

Set your Program Country – We need to know where the program is running to ensure the details are right for your location.

Choose your Program colour – This will set the look and feel of your online Program portal once you login. This can also be amended at a later date.

Name your Organisation / Business *

Create a org

Name your program *

Create a pro

Set your program sub-domain

Set Your Program Country*

AU

Choose your program primary colour



Choose your program secondary colour



STEP 4: Your Structure

This is where you set-up the structure of your program. In most cases this will mimic the organisational chart of your business. You can do this now, or go to 'Next Step' and do this later under the Structure Details tab.



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Add Region ⓘ

NSW Region

Add Region

Add Team ⓘ

Sales

Add Team

Add User

Mary Jones

mary@jones.com.au

Add User

STEP 5: Payment Details

Please provide us with the credit card you would like to use. Please note that your credit card will not be charged until you reach the end of your trial period (14 days).

If you choose to continue, the card details provided here will be used as your default card for monthly User fees, and purchasing Reward Points.

You have the ability to change these card details down the track.

Card Number

.....

Security Code

...

Name on Card

Expiration

MM / YY

ADMIN & REPORTS

Once you have officially signed up to Xtend, you will automatically login, and have administration rights. There are a number of things you can then tailor to your specific program needs. All accessible under **Program Management**.

- Program Management
- Structure Details
- Program Tenure
- Program Transaction
- Plus Points Allocation
- Redemption Reports
- Nominations Reports
- User Reports
- Program Communication

IMAGE MANAGEMENT

You can upload images to your program, to align it with your company/program branding.

Desktop Feature Image - 1127px x 267px



If you would like to have a rotating carousel of images, upload multiple feature images

Login Image - 400px x 400px

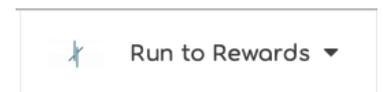


Mobile Feature Image - 600px x 450px



Icon Image - 40px x 25px

Appears as below:



PROGRAM MANAGEMENT

Points Name – What would you like to call your points currency? I.e the points your participants earn. For example, 'Star Points'

Scale Points by – What would you like to scale your points by? Our usual recommendation (and the default) is 1 point = 0.50c. You can however scale them however you like!

For example:

If you want 1 point to equal \$0.50, then you need to scale your points by 2

If you want 1 point to equal \$0.25, then you need to scale your points by 4

Maximum Product points value (0 represents no limit) – Depending on how many points your program participants can earn you may want to place a maximum on the value of products available for them to browse. This will ensure no products are completely out of reach.

Allow Points to be purchased – If a program participant has earned points however is just that little bit away from being able to afford a certain product, would you like to provide the option of purchasing points?

Maximum Purchasable Points Value (0 represents no limit) - This can be set at any denomination. We usually suggest no more than \$50 to ensure it does not devalue the program objective and the overall aim of earning to redeem.

Team Label - This is the name to refer to the team by. Setting up Teams, and later allocating Team Leaders of these Teams, will allow them to view all their Team Members, allocate points using a credit card, and run Team specific activities. All Users must belong to a Team, so if you want to keep your structure flat, we would recommend putting everyone in the {Program Name} Team.

Regional Label – This is the name to refer to the Regions by. This is effectively just another level of your organisational structure. They could be Departments (eg HR, IT, Sales) or they could be geographical (North, South, NSW etc) – it's up to you. You can later allocate Managers or Heads of each of these Regions/ Departments. This will allow them to view all the Teams & Users within their Region, allocate points using a credit card, and run Region or Team specific activities. All Teams must belong to a Region, so if you want to keep your structure flat, we would recommend putting everyone in the {Company Name} Region.

Celebrate birthdays – Xtend provides the option to celebrate Birthdays – this is optional. When a participant logs in on their birthday confetti will pop up on the screen, just a little bit of fun! To utilise this function, you need to import User's birthdays using the import template (see Structure section)

Program Name:

Program SubDomain:

Program Primary Color:



Program Secondary Color:



Point Name:

Scale Points By:

Maximum Product Plus Points Value (0 Represents No Limit):

Allow Points To Be Purchased:

Maximum Purchasable Plus Points Value (In a single transaction - 0 Represents No Limit) :

Region Label (Name To Refer To Regions By):

Team Label (Name To Refer To Teams By):

Celebrate Birthdays ⓘ :

MODULES

Allow Posts - This will enable the 'Posts' content blogs to be viewable by Program Participants.

Allow Profiles – this will enable you to easily browse User profiles by Team & Region.

Allow Program Tools – This will enable the 'Program Tools' content blogs to be viewable by Program Participants.

Allow Awards – this will enable you to create and manage specific Awards within your program. These Awards can take many different forms, and can include a Points value as a Prize.

Allow activity feed – The activity feed will share any activity within the system with all program participants. For example, 'Sophie just thanked Dave for his hard work'.

Program Tenure – If you have imported User's Commencement Dates using the import template, this is where you can set the benchmarks you would like to see recognised, and the points amounts you want awarded. When their Tenure benchmark date is reached, the system will send the User an email detailing their achievement, and their how many points they have been awarded. If you want to send them an email, but not give them any points, put 0 in the 'Reward Points Value' field. If you don't want to recognise Tenure through the system at all, don't touch a thing.

Program Transaction – this is where you can purchase extra points for the program. It doesn't actually allocate them to a specific User or Team at this stage. You need to do that next – at 'Points Allocation'

Points Allocation – this is where you allocate points you have already purchased (see 'Program Transaction'). Assuming you have just purchased the points they will be sitting in the Program. Once you select this it will show you how many points you have available to transfer. Choose the number of points you want to transfer and select who you would like to transfer them to (can be a User, Team or Region). You can also select exactly how you would like the system to handle the transfer. I.e. Display the transfer in the activity feed (i.e. people will be able to see it – not the amount though), send an email (tell the recipient the good news), and even select a personalised message to go with the email.

Redemption Reports - from here you can see a summary of all orders made by Users in within your view, and the total Points spent in placing these orders. You can also see a full history of all orders placed, also available as an export.

User Reports – gives you a top-level summary of User activity on your program, plus detailed logs on a user by user basis.

MODULE CONTROLS

Allow Posts Module

Allow Awards Module

Allow Profiles Module

Allow Activity Feed Module

Allow Program Tools Module

PROGRAM COMMUNICATION

Xtend comes with automated e-mails that ensure your program runs smoothly at your participants every interaction. These are branded Xtend and reference your program.

These emails include:

- **User Login Account** - send once you notify users to login and simply includes a link and their username and for them to set their password.
- **Unsubscribe Email** - sent in the instance you remove a user from the program once live.
- **Thank you Emails** - sent to participants as they receive Thank yous to prompt them to login and see what they received.
- **Order Emails** - including order placed, status of orders and order shipped.
- **Award Winners** - sent to all participants when a winner / top achiever is chosen in a given award.
- **Emails related to Posts** - you will be notified as program manager if a new post is created by a team leader (is appropriate) or a comment is made.
- **Birthday** - Email wishing them a happy birthday and drive them to access your site.
- **Transfer of Points** - notifying the recipient if they have received Reward Points.

For any further questions or queries please utilise the support module at the bottom right-hand side of your screen, or email hello@xtend.com.au.

Reward and recognise your employees with one simple platform.

XTEND

POWERED BY EVT MARKETING