



Xactly Rewards™ for Force.com Administrator Reference V1.1

With Xactly Rewards™ for Force.com, you can create a variety of contests and ongoing programs that are completely integrated with Salesforce.com objects.

Available Objects

The objects and related reward criteria are as follows:

- **Contests:**
 - Opportunities – Closed highest opportunity amount
 - Opportunities – Closed highest number of opportunities
 - Cases – Closed highest number of cases

- **Programs:**
 - Opportunities – Amount/Stage
 - Opportunities – Amount/Stage/Quantity
 - Leads – Converted Leads

Contests

Contests can be targeted to sales people and customer service reps, and have the following characteristics:

- Points are awarded once
- Focused on a single criteria
- Focused on one Salesforce.com object
- Winners can be ranked
- Awards points are given based on rank
- A time frame is set

Sample Contests

- **Opportunities – Closed highest opportunity amount**
A quarterly contest can be created that awards points to the top three salespeople who close the highest opportunity amounts.
- **Opportunities – Closed highest number of opportunities**
A monthly contest can be created that awards points to the top five salespeople who close the highest number of opportunities.
- **Cases – Closed highest number of cases**
A quarterly contest can be created that awards points to the top 10 customer service representatives who close the most cases.

Contest Tips

- **Standardize contest names**
Standardize your contest names so you can easily remember time frames and goals. Ex: FY08M9 – Top 3 Qualified Leads.
- **Be sure to “Publish” your contest**
This will let program members know that a specific program is live.
- **“Execute” your contests**
Contests will not run unless you complete this step.
- **Consider approval workflows or field validations**
These will add another layer of process control for these contests.
- **Be sure to “Enable” your contests**
Click the “Enabled” check box to make sure the desired contests will run.

Programs

Programs can be targeted to salespeople, customer service reps, and lead generation/telemarketing reps, and have the following characteristics:

- Points can be awarded multiple times for the same rule
- Can contain multiple rules
- Can relate to multiple Salesforce.com objects
- Awards points are given based on achieving each specified goal
- No limit to number of points each participant can receive
- A time frame is set

Sample Programs

Programs can contain any number of and mix of rules that can be based on:

- Opportunities – Amount/Stage
- Opportunities – Amount/Stage/Quantity
- Leads – Converted Leads

- **Opportunities – Amount/Stage**
A rule can be created to award points to those who meet specific amount and stage criteria for their opportunities. This can be met multiple times.

- **Opportunities – Amount/Stage/Quantity**
A rule can be created to award points to those who meet specific amount and stage criteria for a specific number of opportunities.

- **Leads – Converted Leads**
A rule can be created to award points to those who meet specific lead conversion counts.

Program Tips

- **Standardize program and rule names**
Standardize your program and rule names so you can easily remember time frames and goals. Ex: FY08M9 – Top 3 Qualified Leads.

- **Create all rules before creating the final program**
This will simplify the process.

- **Be sure to “Publish” your programs**
This will let program members know that a specific program is live.

- **Consider approval workflows or field validations**
These will add another layer of process control for these programs.

- **Be sure to “Enable” your programs and rules**
Click the “Enabled” check box to make sure the desired programs and rules will run.

Manual Points

Xactly Rewards™ points can also be distributed manually. This allows for great flexibility in creating programs that entail criteria outside of the currently available objects/activities.

Manual Points Tips

- **Rewards recipients must be Salesforce.com users**
The application is accessible only if you are a Salesforce.com user (and part of your company's Salesforce.com account).
- **Use manual points to create “on the fly” contests**
You can reward points to any Salesforce.com user at your company.

By downloading and/or using Xactly Rewards™ you agree to be bound by the terms and conditions set forth in the Xactly Rewards™ Subscription Agreement.