

GUUSTO TEAM MEMBER TRAINING



ACCOUNT SETUP

1. Click link in invite email and enter the temporary login details provided in the email
2. Navigate to “Profile / Preferences” to change password
3. Navigate to “\$ funds” in header menu to view your account funds:
 - a. **Team Member** – funds allocated to you by team admin
 - i. **Available funds** – a set amount transferred to you to buy gifts
 - ii. **Open spending** – you can spend team funds without a pre-transfer
 - iii. **Unclaimed gifts** – can be cancelled for full credit back to your account
 - iv. **Member spending** – amounts spent and spending limits
 - b. **Primary Account** – funds to send personal gifts (not visible to team admin)

SEND ITEMS OF RECOGNITION

1. Go to www.guusto.com and click “login” in top navigation (select “login to web platform”)
2. Navigate to “buy gifts” in header menu:
 - a. **# of gifts** – number of people you'd like to recognize
 - b. **Gift value** – set value of each gift
 - c. **Gift item** – “guusto card” valid at any merchant, “dinner” valid at any restaurant...
 - d. **Valid at** – leave as “Any Partner Venue” so recipient can choose
 - e. **Image** – perhaps a selfie (you can load a default in “Profile / Preferences”)
 - f. **Message** – say something nice
 - g. **Claim by** – set a date (if not claimed, you receive a full credit back)
 - h. **Ordered by** – enter name (useful for an assistant using account)
 - i. **Reason** – keep track of reason (customize dropdown list in “Reasons” section)
 - j. **Must be paid forward** – mandates that the recipient pass gift to someone else
3. Delivery
 - a. **Recipients** - enter name, email address and/or mobile phone #
 - b. **Scheduling** – use calendar if you'd like to schedule gifts
 - c. **CC on emails** - check box and enter your email address to be cc'd
4. Payment - select the appropriate team member account making purchase
5. Order Confirmation – option to notify colleagues of the gifts sent to keep them in the loop
6. Manage Gifts – see all your ordered gifts, who claims, and send reminders

REDEEM ITEMS OF RECOGNITION

1. Open email or text message and click the link to view gift (phone or computer okay)
2. The web browser will open, click “view my gift”
3. Enter your email address and password, and then press “add to my gifts”
4. Write a quick thank you message to sender and then press “send msg & view my gifts”

Note: Once gift is added to “my gifts”, you can redeem immediately or hold off and login anytime to “Redemption Portal” at www.guusto.com or login on the Guusto mobile app

5. In your account, click the gift you'd like to redeem
6. Click “choose venue”
7. Select your city
8. Select desired merchant (once confirmed it cannot be changed)
9. Click “view gift code”
10. Present gift code (on phone or print out) to staff to have value applied towards bill (no restrictions, gifts never expire, balance is saved for return visits to same merchant)