:Introduction

Tradler is an online platform that will help you drive engagement within your team and drive actions and behaviors on your contributors by recognizing the daily work they do and rewarding their individual contributions toward the Team´s Goals and objectives.

As a Manager, you will play a key role in the Tradler platform.
From the platform, you will be able to

- Define what are the main goals, metrics, and KPIs that will drive your team´s performance,
- Track both, your teams and every contributor's individual performance over those metrics, while your contributors are being rewarded daily by receiving points for their actions and contributions.
- While you track the users' performance, one of your main responsibilities will be to recognize users for their hard work. You will be able to send personalized individual or team recognitions awarding contributors with some extra points, and including relevant messages and Gif´s to encourage the actions that will lead to the team´s success.
- You or your organization, can define the kind of incentives that the users will be able to exchange their well-earned points for.
- You will be able to invite new users to join Tradler, and delete the users that have left the organization.
- You will be able to shape the organizational structure of the teams that fall under your role.
- Send notifications to inform one or more teams and keep them updated on the most important news and relevant information.

In the following chapters, we will deeply go through these different actions and responsibilities so you can make the best out of Tradler.

Giving Recognitions

Recognizing your team's work and the desired actions or decisions they make is one of the most powerful ways to encourage those behaviors to continue. With Tradler, you can drive these actions, creating positive habits and boosting morale within your team.

As a manager on the Tradler platform, you can send recognitions to individual team members or the entire team for their achievements, desired actions, and daily efforts. Each month, you will receive a certain amount of recognition points to distribute. The number of recognition points you will receive depends on your team size and the recognition budget set by your organization.

To send a recognition, follow these steps:

1. **Access the Recognition Page**:
    - Click on the **Recognition** button at the top of the screen to navigate to the Recognitions page. If you are using the app, you can find this page on the top-bottom menu.

If you are using the web version follow these steps:

1. **Select Users**:
    - Click on the **+ Add** link.
    - Use the search box to find and select individual users or team names.
    - Check the boxes next to the desired users or click **Select All** at the top to choose the entire list.
    - Click **Save** once your selections are made.
2. **Assign Points**:
    - Back on the Recognitions page, enter the number of points each selected user will receive.
    - The round graph next to the points input will show your remaining recognition points after this distribution.
3. **Personalize the Message**:
    - Craft a meaningful message to include with the recognition. The more impactful the message, the more it will encourage future positive actions.
    - Use the format buttons to format your text, add links, or include emojis.
4. **Add a GIF (Optional)**:
    - Although optional, adding an encouraging GIF can enhance your message and show appreciation for the team's efforts.
5. **Send the Recognition**:
    - Click on **Send Recognitions**. The selected users will receive your appreciation along with the points they can exchange for incentives and rewards.

If you are using the app follow these steps:

1. **Assign Points**:
    a. Enter the number of points each selected user will receive. You can see how many available points you still have to give that month on the top.
2. **Personalize the Message**:
    a. Craft a meaningful message to include with the recognition. The more impactful the message, the more it will encourage future positive actions.
    b. Use the format buttons to format your text, add links, or include emojis.
3. **Add a GIF (Optional)**:
    a. Although optional, adding an encouraging GIF can enhance your message and show appreciation for the team's efforts.
4. **Click on Continue**
5. **Users**:
    a. Use the search box to find and select individual users or team names. You can invite a user that is not part of the platform yet.

    - Check the boxes next to the desired users or click **Select All** at the top to choose the entire list.
    - Click **Save** once your selections are made.
6. **Confirmation**
    a. Confirm the recognition information is correct and Send the recognition.

These steps will help you effectively recognize and reward your team, fostering a positive and productive work environment.

Recognition FAQ´s

Do I have to earn points to be able to give recognitions? No, you might have the chance to earn your own points by hitting metrics or giving and receiving recognitions, but these are just metrics points that you can use to buy incentives. The recognition points are different, the recognition points are a set of points that are given monthly to the managers and users so they can be given away as an appreciation to the team members for their effort and contributions

I don't have enough points to recognize my team. The recognition points get reset every month, if you have spent them all on recognitions already, you will just need to wait until next month to see your recognition points balance reset again.

How many recognitions points do I have available

I can't find a person on my team. If you can´t find a user who should be on your team, you can first ask him if he has already created his Tradler account. If he has created his account already, it's possible that he might have been assigned to some other team. You can try to go to the Team Management section and edit your team members to include this user. If he has not created an account yet or has not received an invitation to join Tradler you can invite him from the **Users** section. Take into account that if your company uses automatic data the users will be automatically invited to your team and you won't need to do anything. If you are unsure whether your company uses automatic data, you can check with your manager or Tradler's project manager.

Can I give recognition to people outside my Team? Yes you can, on the select user section of the recognitions page, just select **All Teams** and then search for the person you want to give the recognition to.

USERS Management

As a Manager, you will have the opportunity to self-manage the team members in your team. This means that you will be able to Invite new team members to join your team in Tradler, delete users that have left the organization, and also edit some personal and organizational information from the users in your team.

You will be able to do all of this from the **Manage Users Page**, only available on the web version. To access it just click on the **Manage button** at the top of the screen. Once in the Manage page, select the **Users** option on the left side of the screen and you will be directed to the Manage Users page.

Invite users

Normally the users are automatically invited to join Tradler the moment that they join the organization, in case one of your team members did not receive the invitation, you can always invite them yourself.

- To invite a new user just click on the "**+ Invite user**" button at the top right of the screen.
- You will be presented with a form to fill in some of the user's basic information
- Fill in the email, name, and last name of the user.
- The External id is the user's unique identifier that your organization uses in Tradler. **This is an important field as each achievement a user will be linked to this Id.** If you are not sure about what External ID your company uses, please ask your manager or the Tradler project manager.
- Finally, indicate the Team or Teams that the user belongs to, together with his role in that team. For example: a team member can be a regular user in the team that you manage and also a direct Manager on one of the teams below you. I this case you will have to indicate both.

Delete users

Sometimes you might want to delete users in your teams because they have left the organization, this is really easy to do.

- From the Users Management page, just find the user you want to delete by searching for his/her name. Filtered users will automatically show below.
- Click on the name of the user you want to delete.
- Finally, click on the red **Delete user** button on the Top right. After 30 days of deleting a user, their information will be anonymized, so you won't be able to recover any information related to that user or their account.

Remember you should only delete users that have left the organization, if the user has just changed to another team, you can indicate that by editing his Teams and roles on the **user edit form.**

Edit users

If one of your Team members changes teams, of if you want to change his name or email, you can do so by editing his Tradler information.

- From the Users Management page, just find the user you want to edit by searching for his/her name. Filtered users will automatically show below.
- Click on the name of the user you want to edit.
- Make the changes you want on the **user edit form**, and then just click **save.**

User's Management FAQ's

What is the External Id? The External Id is the type of user's unique Id that your organization uses to reference each user. If you are not sure what kind of id you must indicate in the user edit form try checking the External Id of one of the existing users to try to identify it. If you are still unsure, we suggest you contact your manager or the Tradler project team/manager.

One of my team members keeps on changing Teams and roles every few days. If your organization uses automatic data, it sends users' information to Tradler every few days. This includes organizational information, and Tradler automatically changes the users' teams and roles according to that information. If you think that a user who should be on your team has changed to another team contact your manager because the information being sent to Tradler by organization might be outdated.

One of my team members has just disappeared from the list. Your organization sends users' information to Tradler every few days. This includes organizational information and churned team members. Tradler automatically changes the users' teams and roles according to that information. If one of your team members has disappeared from your team it might have changed your organization's user information or even been deleted. If you think this might have been a mistake, contact your Manager.

One of my team members' accounts has been deleted. If one of your team members' accounts has been deleted, you can always invite them to join Tradler again by sending them a new invite. If that person logs in again on Tradler somewhere in the 30 days after the account was deleted their account will be automatically restored and they will be able to keep the points that were earned before the account deletion

There is a person on my team that has left the company a long time ago. In case the user's information that the organizations send to Tradler doesn't account for the employee leaves. If you feel this is the case, you can safely delete the user's account from the Users Management Page.

Resend invites

My Team - Track your team’s Performance

One of the nicest features of the Tradler platform is to be able to track your team´s and team members' performance over your most important metrics. This feature not only allows you to keep track of how your team is performing but also makes it really easy to identify who are your best performers in a way that you can thank them for their work and appreciate their contributions to the team´s achievements.

To find the “My Team” page just click on the Management button at the top of the screen, and the “My Team” page will be the page that will show by default. This is only available on the web version.

Here you will find a series of panels and sections that will allow you to get a great overview of your team status and performance.

- You will find an engagement panel that will show your team's average engagement score from the current week, together with a little arrow that indicates if it has increased or decreased compared to last week. This engagement score represents the answers to the engagement question that is active at that moment.
- You will also find a panel with the recognition points that you still have available for the month, remember that the number of points that you have available to give away as recognitions among your team members, gets reset every month, and those that you have not given will be lost.
- On the My Team page, you will also find a Team selector Section where you will be able to select the team that you want to see the metrics performance insights on.
    - If the team that you select has more subteams you will be able to select those to go as granular as you want. If you have many teams or subteams, you can click on the hierarchy tree icon as this will make it easier to navigate and find the team or teams that you're looking for.
    - If the team that you select doesn´t have any subteams you will be presented just with the list of users on that team, so you will be able to check any team member's individual performance.
- You will also find the performance graph where you will be able to specify the criteria of the metric information that you want to see.
    - You can select the dates on which you want to see the team's performance results.
    - Select the teams or teams that you want to show, and toggle the option if you want to see the accumulated results of the subteams that fall under the selected team
    - Select the metric that you want to display information about.

    - If you have only one team selected, you can even compare the results of two different metrics at the same time.
- Finally, at the bottom of the page, you can find the engagement graph that shows you the average answer to the main engagement question of the teams selected on the performance graph. The dates shown there are also the ones you select on the previous performance graph.

Team Performance FAQs

I want to check if a user has received points on a particular date. If you want to check if a user has achieved metrics on a particular date and therefore received points over those metrics.

- Go to the My Teams page and navigate the user team in the Teams section
- Once you click on the user´s team you will be presented with all the team members on that team
- Just find the user you are looking for and click on the column chart icon next to his name
- Now you can filter over any metric and time period to check his performance in the graph

When I try to see my team's performance metrics, the graph says there is no data. It's possible that your organization might have some unused metrics defined in Tradler, these metrics will still show on the graph filters, other teams metrics that are not relevant for your team might also show in this metrics filter combo. These unused and no relevant metrics, will show no data in the graph, as no information on these metrics is being reported for your team members.

Team Management

As a manager you will be able to create and manage your teams in Tradler. This way you will be able to keep a clear overview of your employees and be able to easily shape the organizational structure of the teams that fall under your role.

You can manage your teams by going to the **Manage** page in Tradler and then clicking on **Team Management**. This page is only available on the web version. Important note: If your organization uses automatic data, it sends users' information to Tradler every few days. This includes organizational information, and Tradler automatically changes the teams and roles according to that information. If you think that a user or team information is not correct contact your manager because the information being sent to Tradler by the organization might be outdated. If you are unsure whether your company uses automatic data, you can check with your manager or Tradler’s project manager.

Teams follow a specific hierarchy in Tradler:

Parent teams

- These are the overarching teams in your company. Each company has a global parent team, under which there are different sub teams that can be denoted by different categories (County, City, Department).

Children teams

- These are the subteams that fall under the Parent teams. Each team can have multiple children but only one parent.

This structure allows for an easy overview of the hierarchy within your company.

How to create a team

In the **Manage Teams** tab, you can press the **+ Create team** button to create a new team. In the window you will see the different options that you are able to fill in. The required fields are marked with an asterisk.

Name: The name of your new team

Nickname: You can give a nickname to your team to easily identify it.

Parent team: Here you can choose a parent team to already give your team its correct place in the company hierarchy. If you do not choose a parent team then your team will be independent. You can still change the relationship of your team afterwards.

Users: Here you can add users to your team. Click on the **+ Select users** to start adding users.

Managers: Here you can add managers to your team. Click on the **+ Select managers** to start adding managers, one team can have various managers. Remember that the recognition points managers have available to distribute depend on the number of users and managers that team has. So if you add a new manager the total points will be split among all the managers, meaning your points may be reduced.

Indirect Managers: You are also able to add indirect managers to your team. Indirect managers are a kind of manager that can´t give recognitions to the team members, These kind of managers are normally used for controlling or reporting purposes

After you are finished filling out these fields, you can go ahead and set up the Metrics for your team. Click on the **Create & setup metrics** button to set up the Metrics.

How to delete a team

In the **Team Management** tab, click on the bin icon on the right to delete your team. You will receive a pop-up window to confirm your choice. Click **OK** to definitively remove your team.

Team Management Frequently Asked Questions

I can´t find one of my teams. Tradler frequently receives HR structure information for keeping the teams and dependencies updated on the platform. If at some point you feel like one of your teams is missing you can ask your manager to check if he has visibility over that missing team, if he does he will be able to edit the team to include you as a user or as a manager if that is the case. If this keeps happening, please contact Tradler support.

One of the teams has no manager assigned to it. If one of the teams under your hierarchy doesn´t have a direct manager linked to it, you can always edit this team´s settings and include the user you want to be the manager of that team. If you can´t find him, it is very likely that this manager did not create his Tradler account yet.

I want to delete a team that we are not using anymore

Define Metrics

Reports Page

Introduction

In Tradler we work with an important amount of data, and we have built the reports feature to make it as accessible for any manager to have the most important and up to date information on their teams and team members.

In the reports page you will find valuable information about the usage of the platform, how are the managers giving recognitions, teams headcount evolution and performance, what incentives are the most popular and much more. This page is only available on the web version.

Active Team Members report

The Active Team Members report is intended to give you an overview of how many people in your teams are using the app on a specific period of time, this is by week or by month. We consider active users to anyone who has logged in Tradler, or opened the app at least once, during the specified time period.

In the Active Team Members report you will find the following fields

- Team : This is the team´s name.
- Parent_team: The team´s parent team
- Year - month / Year - week: depending on the type of time period that you have indicated, This shows the referenced period considered on that record.

- Team members: Shows the total amount of Team members included on that team included that particular month or week.
- Active_users: Showing the number of team members that have been active the referenced week or month
- Act_users_pct: this is just a percentage calculation between the active users and the total number of users.

Incentive Type Usage report

The Incentive Type Usage, lets you know which of the incentives present on the platform, and that your employees can exchange their points for is more popular at the moment. This is, how many people have requested each one of the available incentives.

In the Incentive Type Usage report you will find the following fields:

- Year - month / Year - week: Depending on the type of time period that you have indicated, This shows the referenced period considered on that record.
- Name: This is the name of the incentive that is being considered in that record
- Type: This refers to the type of incentive, (Coupon, lottery, donation, internal…)
- Orders_made: this is the number of orders that the users on the selected teams have done, of that particular incentive, during the specified period of time.
- Points_spent: refers to the total number of points that all these users have spent on that incentive.

Incentive Breakdown per user report

The Incentive Breakdown per user reports, allows you to get a fine grained view of what users have ordered and what incentives. Very useful for lotteries for example, where you can filter for that specific incentive. And then decide which user who ordered that incentive gets to be the winner.

In the Incentive Breakdown per user report you can find the following fields:

- External_id: This is the company Id of the user
- Full_name: The users name and last name
- Gift: this refers to the incentive name that the user has ordered.
- Type: This refers to the type of incentive, (Coupon, lottery, donation, internal…)
- Price: this is the monetary value of the incentive that the user has ordered
- Currency: this references the currency over the price unit is defined as.
- Order_id: This is a unique identifier that Tradler uses to identify each order.

Manager Recognitions report

The Managers Recognition report, provides information on the recognitions that each team manager has given to the members of his team. Note that this report does not account for the recognitions that managers of other teams have given to the users. The idea with this report is getting a better understanding of the way that the Team´s direct manager is recognizing their team members.

In the Manager Recognitions report you can find the following fields:

- Team: The name of the team that the record refers to.
- Manager: The full name of the direct manager that has given the recognitions
- Year - month / Year - week: Depending on the type of time period that you have indicated, This shows the referenced period considered on that record.
- Recognitions: The number of recognitions that the manager has given
- Unique_members_receiving: This refers to the number of users that have received some recognition from that manager in that particular month/week. Remember that one single recognition can be given to various team members.
- Regular_user_count: This is the amount of regular users (non managers) that are part of that team.
- Points_given: The points given field refers to the total number of recognition points that have been distributed among the team members on the recognitions considered on that record.

Member Metrics report

The Members metrics report gives you very interesting insights on the total amount of metric values that each team member has achieved over the different reported metrics during a specific period of time (weekly or monthly). This report is very useful to analyze the performance and productivity of each one of our team members, over the most important metrics defined in the platform.
Note that not all the metrics defined might be actually being used or reported to, on those case the value will show as 0

In the Member Metrics report you can find the following fields:

- User: Name and last name of the referred user
- External_id: This is the user´s company Id
- Team: Here you will find the team name or the list of teams that the user belongs to
- From - To: Here you will find the dates of the week or month, that the record refers to
- List of metrics: Next you will find a variable list of metrics that your company has defined and where the user might have achieved a certain amount of metric values.

P2P Recognitions report

The P2P recognitions report allows you to have an overview of the recognition points that each Team member has given to their colleagues in appreciation for their collaboration or just to celebrate their achievements..

In the P2P Recognitions report you can find the following fields:

- User: The full name of the user
- External_id: This is the user´s company Id
- Team: This field will show the name of the team that the user belongs to
- Year - month / Year - week: Depending on the type of time period that you have indicated, This shows the referenced period considered on that record.
- P2P: will show the number of recognitions that the user has given to their colleagues
- Users_receiving: This refers to the total number of colleagues that have received recognitions from the user, remember that each recognition can be given to various users.
- Points_given: This is the total number of recognition points that the user has given to their colleagues

Points per Team Member report

The Points per Team Member report will allow you to see how many points each one of the team members has achieved during a certain period of time (weeks or months) and also understand if these points were earned by achieving new metrics or milestones or if they were earned through recognitions.

In the Points per Team Member report you can find the following fields:

- User: The full name of the user
- External_id: This is the user´s company Id
- Team: This field will show the name of the team that the user belongs to
- Year - month / Year - week: Depending on the type of time period that you have indicated, This shows the referenced period considered on that record.
- Recognitions: This is the amount of points earned by the user on recognitions over the given period of time
- Metrics: This is the amount of points earned by the user on metrics over the given period of time
- Milestones: This is the amount of points earned by the user on metrics over the given period of time
- Spent: This refers to the amount of points that the user has spent on incentives during the given period of time.

Recognitions Received per Type

The Recognitions Received per type report will provide an overall view of the recognition distribution among the different teams, and their evolution, considering the total number of members on that team this will allow to calculate a recognition per team member average.

In the Recognitions Received per type report you can find the following fields:

- Team : This is the team´s name.
- Parent_team: The team´s parent team allowing you to aggregate data
- Year - month / Year - week: depending on the type of time period that you have indicated, This shows the referenced period considered on that record.
- Team members: This field will reference the total number of team members that are part of that team in that particular week or month.
- P2p: This will be the amount of times that someone has received a p2p type of recognition during that period of time
- Manager: This will be the amount of times that some team member has received a Manager type of recognition during that period of time, this will account for all the recognitions that a manager has given to members of that team, no matter if it´s the direct manager or some other manager.
- Mass: This field refers to the amount of times that some team member has received a Mass recognition.
- External: If your company has the feature of reporting the external type of recognition, you will find here how many times the users on that team have received this type of recognition.

Team Members report

The Team Members report main goal is to allow you to see the headcount evolution of the different teams under your scope. By analyzing the number of entries and exits of employees on each team, you will be able to analyze the churn ratio, or even plan resources that will be needed.

In the Team Members report you can find the following fields:

- Team : This is the team´s name.
- Parent_team: The team´s parent team allowing you to aggregate data
- Year - month / Year - week: depending on the type of time period that you have indicated, This shows the referenced period considered on that record.
- New_registrations_count: Indicating the number of new joiners on that team on that particular time period
- New_leaves_count: Here you will find the number of leaves that have occurred on that team that week or month.
- Total_team_members: This will indicate the total number of team members, on the last day of the given time period.

Team Metrics report

With the Team Metrics report you will be able to easily see the performance of your teams through time.
Check on their evolution, understand the variations over the different metrics that are reported to Tradler and even foresee the impact of varying the resources included on a particular team.

In the Team Metrics report you can find the following fields:

- Team : This is the team´s name.
- Parent_team: The team´s parent team allowing you to aggregate data
- Year - month / Year - week: depending on the type of time period that you have indicated, This shows the referenced period considered on that record.
- Total_team_members: This will show the total number of team members that worked on that team over a particular period of time.
- List of metrics: Next you will find a variable list of metrics that your company has defined and where the team might have achieved a certain amount of metric values.

Reports Page Frequently Asked Questions

I want to select specific dates on the reports that I download. Currently it is not possible to indicate a specific date range other than weeks or months. The reason for this is because All of the user´s historic data (recognitions, metrics, points, everything) is linked to the user id. So what would happen when the user leaves, or moves from one team to another, is that all that historic data moves with him/her, meaning that the results that a team achieved in January, could change if you look at them in February or April, just because some people left the team in the middle.

So the way we handle it, is that Tradler takes a picture on a weekly and monthly basis of who was in what team in that week or month. This way, for managing reports we reference the users in that picture at that time, this way we are able to show consistent data that will not change through time, no matter what happens to that user afterwards....

This is why you can only select weekly or monthly data.

How can I use the reports to Assign Lottery winners. You can use the incentive breakdown per user report to identify all the orders done over a specific lottery, the order id is unique for each order, so you can just randomly select an order id, and set as winer to the user that places that order.

Targets and Metrics

A metric setup is in the core of Tradler Functionality. A metric setup refers to the process of defining the series of metrics and targets for each of your teams. This can be customized for different teams based on your requirements. The setup involves deciding the benefits budget (the amount you want to spend per person per year on incentives), which will determine the number of points each user can receive. The setup also allows you to adjust the importance/priority of the metric, and choose the main metric for your team. At any moment, you can edit, add, or delete the metrics or targets to ensure the setup is always meeting your team's needs.

A setup consists normally of a set of 3 or 4 metrics, where 1 of them is defined as the main metric and the rest as secondary metrics.

Create a new Metric setup for my teams

- Go to your profile and select `Manage`. This page is only available on the web version.
- Access `Targets & Metrics`.
- Click on `Add Setup` and then on `Let's get started`.
- Name your new Setup and select the team(s) you want for this setup, click on “Include descendants” if you want the descendant teams to be included in this setup
- Add the benefit budget. This is the amount you want to spend per person per year on incentives. The number of points each user receives will depend on this budget.
- If you click on `Advance`, you will be able to check and change the allocation of points. The conversion rate is 1€ equals 400 points.
- After setting the Allocation of points, click on the `next step`.
- Start adding new metrics to your setup.
- Finally at the bottom of the screen you will be able to select which one of the metrics that you have added should be the Main metric.
- Click on the Next Step button to access the validation page and save your setup.

Adding a new Metric to my Setup

- **Choose one of the metrics** that your company has already defined, or create a new one. We recommend that you choose a predefined metric, as these are agreed between Tradler and your company and there are better chances that these can be reported to Tradler with the right consistency. If you decide to create a new metric take into consideration that your company may not be sending information about this metric to Tradler.
  If you are manually uploading metric values and decide to create a new metric make sure you fill in the metric_key (on the Advanced configuration). That metric_key is the metric identification name. You must use the same identification on the spreadsheet you upload manually to the platform.
- **Target-driven**: When you define if a metric is target-driven, you indicate to the user what are your expectations regarding that metric. The user will be able to see what is his progress towards that target.
  - If you indicate the metric as target-driven you will be asked what amount of metric units you expect the user to achieve in a certain period (day, week, month…)

    - If you indicate that the metric is not target-driven you will be asked what is the average level of metric units achieved on your team on that metric in a certain period (day, week, month...)
- **Journey or Destination:** Here is where you must decide how you want the users to earn points.
    - Journey: With a Journey type of setup, the users will earn points every time they achieve a new unit of that particular metric.
    - Destination: If you define a metric as a destination, they will only get points once they have reached a certain amount of units of that particular metric. You will define this on the *"Start rewarding users once they reach"* input field
- **Importance/Priority of the Metric**: Finally you can adjust the importance or priority of the metric. If you want users to earn more points with this metric than the other ones, select High. If you want them to earn fewer points, select Low. This will affect the allocation of points, so on average, the most important ones will get more points than the not-so-important ones.
- **This is it**, now you can click on "Close this metric". From the section below you will be able to define which is the main metric, and edit or delete any of the previously created ones.
- Once you have all the metrics of your setup defined, click on Next Step to go to the validation page. To check and validate your setup.

Validation Page

Once you have added all your metrics and defined the main one, you will be presented with the validation page. Here you will be able to click over the different metrics that you have created to see an overview of each one of them.

One of the most important aspects you will want to check on this overview page will be the Points / unit value and the expected points per month, this will give you a good overview of how the point allocation of your setup will work.

Finally click on the Complete Setup to make it effective to all the teams included in your setup.

Remember, at any moment, you can edit, add, or delete the metrics or targets to make sure the setup is always covering your team's needs.

Gift Management

In Tradler, your team members will be able to exchange the points that they have earned through their efforts and contributions for different kinds of Incentives or Gifts.

Some of these incentives or gifts are defined and updated by your company, and these can be of mainly 4 different types (Internal Incentives, Gift cards or Coupons, Donations and Lotteries).

Coupons: are a type of external incentive managed completely by Tradler, including both the order and delivery. They represent gift cards from various brands and stores and can be used almost everywhere except Antarctica.

Internal incentives: Internal incentives are rewards that you can provide within your company, such as a day off, cinema tickets, dinner, etc. These incentives are managed internally by you, meaning that while you use the Tradler platform to manage the orders, you and your company are responsible for delivering the incentive.

Donations: Donations are a type of incentive. They can be made to different NGOs or even the CSR projects of the company. Users can suggest NGOs they would like to have on the platform and Tradler will reach out to them to ask if they can be added. Tradler currently partners with more than 20 NGOs that users have suggested. To add a donation as an incentive, you would follow the same process as adding a gift card or other incentive.

Lotteries: Lotteries is a type of incentive that you can create and manage. This type of incentives are normally very accessible for the users, costing a low amount of points, in exchange for the option of winning some high perceived value gift.

If you want to add a new incentive for your team or teams. Here are the steps you can follow:

- 1. Go to manage. This page is only available on the web version.
- 2. Go to Gift management - Gift options
- 3. Click on Add Incentive
- 4. Select if you want to add an Internal Incentive, a Coupon, Gift cards, or a Donation

If you are adding an Internal Incentive, you just need to fulfill the information that is required and you will have to manage the orders users make. In order to make this as accessible as possible you can click on the Gift Management - Orders, to easily find the different orders requested by the team members and manage their current status.

If you decide to add a lottery as an incentive, you will also need to fill in the information and define the time period where this lottery will be available for “purchase”. Once this period has finished, you can consider using our incentive breakdown per user report, to identify the winner by randomly selecting an order_id.

If you want to add a gift card, select the team(s) and then the provider (the coupon). You will see at the right how users will see this incentive.

Follow the same process to add a Donation. The orders coming from Coupons or Donations are completely managed by Tradler. Choose the gift cards and NGO's you want and Tradler will take care of the rest.

Remember to consider your location and check the tax regulations for monetary incentives, and decide the benefits budget: the amount you want to spend per person per year on incentives.

Gift Management Frequently Asked Questions

….

Send Notifications

As a Manager you will be able to keep your employees updated by sending them regular notifications. This way your team will always stay on top of its performance with the latest information and updates.

To send a notification, go to the **Manage** page, and click on **Notifications**. This page is only available on the web version.

Create notifications

In the **Notifications** tab, you will be able to choose who you would like to send your notification to.

At the top of the screen, you will see the following options:

- **Everyone**
- **Managers**
- **Team Members**

Choosing **Everyone** means that your notification will be sent to both the team members and managers of your chosen team(s).

Choosing **Managers** means that your notification will only be sent to the managers of your chosen team(s). This can be used for higher-level communication.

Choosing **Team Members** means that your notification will only be sent to the team members of your chosen team(s). Managers will be excluded from this notification.

When you have selected your desired notification, you can click on **+ Choose teams** to choose the teams that will receive the notification. In this tab, you will be able to search in **All teams** or **My teams**. You can use the search bar to search for specific teams. If you would like to select everyone in **All teams** or **My teams**, click on the **Select all** button. You can also choose to include all the children of your chosen team. To do this check the **Include descendant teams** box. Click on Save at the top right to save your choices.

You can also send a notification to a few specific users. To do that, first of all, select the team(s) that people you want to notify belong to following the previous step. Once the team(s) are selected, you need to fill in the box at the bottom of the screen saying *“Send to these specific external IDs”.* Add there the External ID of all the users you want to notify, putting only one per line.

When you have selected your teams or external IDs, you can write your message in the text box. Here you can add emojis and edit your text to make your message stand out and be effective. You can also include an option link in the **Action URL** tab.

When your message is finished, click on **Send** to issue your notification.

FAQ

….