Stampforce Manual

Stampforce is a Salesforce application used for creating and managing events where participants are allowed to gather unique codes in exchange for performing actions. These codes can be entered by the participant and used to acquire a ‘stamp’. A stamp is proof that a participant has performed the action that the stamp. Stamp codes may only be generated by trusted pre approved users (sponsors). In most cases the ‘action’ performed by the user will simply be visiting a booth of a sponsor, who in turn will provide a code to the user however it is completely up to the sponsor when they provide a code to a user. Once a user has gathered all the stamps available at an event an administrator may configure an email to be sent to the user containing anything from congratulations, to a raffle number to an invite to a VIP event.

You may also wish to have a different flow, where the sponsors enter the users ID and that user is granted the stamp. This makes it easier on the event attendees and puts the entry work back on the event personal.

There is also some basic QR code support, which allows stamp codes to be encoded as QR codes, which could then be scanned be a user. Also users have unique ID’s which can be encoded as a QR code which would allow event personal to simple scan a uses phone screen, or a user may print out the code before the event and have it on an easily scan-able badge.

**Object Types:**

Event – A gathering which sponsors and users will attend on a specific date at a specific time. This is container object for most other object types.

Sponsorship – A junction object that ties an account to an event. Only accounts with sponsorships for an event will be able to generate stamps for that event.

Stampforce User – An overall record that allows a user to log into the application and view events. This acts as the parent record for attendance records. It contains only basic contact information about the user. It also specified what type of user this is (user, sponsor or admin).

**User:** Can gather and enter stamp codes. Users may not generate stamp codes.

**Sponsor:** May generate codes for the sponsorship of the company specified in their record.   
 EX: A User of type sponsor with the company ‘test’ specified would be allowed to generate  
 stamps for any sponsorship the company ‘test’ had.

**Admin:** a combination of the above two roles. May generate and redeem stamps. Mostly for testing and debugging.

Attendance – A junction object that ties a Stampforce User to an event. This object keeps track of the stamps collected and if they are qualified for the reward.

Stamp – A record of an attendee (an instance of an attendance record) interaction with a sponsor. All attendees have a stamp for every sponsor, however only confirmed stamps are counted toward their stamp total. Stamps are only confirmed by entering a valid stamp code (which populates the Stampforce code, and stamp confirmed time fields on the stamp). Administrators may modify the status of the stamp manually if desired (for example if a user was unable to get a code, but rightfully deserved one).

Stampfoce Code – A record that contains a code which may be redeemed by a user to Confirm their stamp. Stampforce Codes are created by sponsor users who report the randomly generated code to the user. The user enters this code and a query is run to find the Stampforce Code record with that code. If one is found the stamp for that user for that sponsor is redeemed, and the code is marked as being used.

Setup:

1. Install the Stampforce package into your org
2. Create a Stampforce event
   1. Most of the flags are self explanatory, the others are outlined here.
   2. Active – Is this event listed in the user facing app?
   3. Reward Template Email – This id of the email template to be sent to a user when they get all the stamps available at an event.
   4. Default stamp image – The image to use when a user has acquired a stamp. This may be over ridden by sponsors who which to have unique stamps.
   5. Missing stamp image – the image to be displayed when a user has not gotten a particular stamp.
   6. Enable QR codes – This allows the generation of QR codes for stamp codes, and for users. Users may scan the QR code given to them by a sponsor to redeem a stamp, or sponsors may scan the QR code of a user to give them a stamp.
3. Create Sponsorships
   1. Sponsorships are objects that will allow the creation of stamp codes. They are related to accounts. The name of the account is the name used for the sponsorship when it is referenced.
   2. Each sponsorship has a sponsor code, this is a unique string up to 5 characters that helps ensure that stamp codes are unique and to help identify from which sponsor a code came.
   3. The stamp image URL allows each sponsor to give out unique stamps. If one is not specified the default stamp image on the event is used.
   4. The location description and stamp action description are displayed to the users to let them know where they need to go, and what they need to do to get the stamp this sponsor provides.
4. That is all that is required for administrative setup. You may now allow users to begin logging in, registered for events, gathering codes and redeeming them for stamps.

**Things to Know:**

The options presented to a user of the application vary depending on their ‘Type’ field specified on their user record. Those with the Type of sponsor will be able to generate codes for their company when they log in. Those with the Type of user will be able to redeem codes for stamps and view their stamps. Those with the type of ‘Admin’ will be allowed to do both. You must manually change the status of a user record to be anything besides the default of ‘User’.

Users who are of Type sponsor can only generate stamp codes for the company which they have specified on their user record. If their company does not have a sponsorship in a given event, they will not be allowed to generate codes for it.

Any user who registers for an event will automatically have every possible stamp created for them. However the stamp only becomes valid once a stamp code has been entered to redeem that stamp. All stamps start with a ‘Generated’ status, but once a valid code for it has been entered the status is moved to ‘Confirmed’.

**Gotchas:**

Users will only be able to see and collect stamps that were available at time of event registration. For this reason it is suggested not to enable an event until all sponsorships have been entered.

Since workflow rules are used to send reward emails, you will need to configure a separate workflow rule for each event with a different email template if you want different reward emails for different events.