

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 “Account > Profile” to load a profile image and change password
3. Navigate to “Account Funds” in side menu (toggle between accounts in header):
 - a. **Team Member Account** – funds allocated to you by team admin
 - i. **Available Balance** – a set amount transferred to you
 - ii. **Unclaimed Gifts** – can be cancelled for full credit back to your account
 - iii. **Available Open Spend** – current team funds allowed to spend
 - iv. **Member Spending** – amounts spent and spending limits
 - b. **Primary Account** – funds to send personal gifts (not visible to team admin)

SENDING GIFTS

1. Go to www.guusto.com and click “login” in top navigation
2. Navigate to “buy gifts” in side 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 (load a default in “Account > Profile”)
 - f. **Message** – say something nice (load 3 default messages in “Account > Profile”)
 - g. **Claim by** – set a date (if not claimed, you receive a full credit back)
 - h. **Ordered by** – enter name (useful if you have an assistant using your account)
 - i. **Reason** – track reason (customize dropdown list in “Account > Gift Reasons)
 - 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 print gifts, export links, or notify colleagues of the gifts sent
6. Manage Gifts – see all your ordered gifts, who claims, send reminders, and cancel gifts

REDEEMING GIFTS

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 have value applied towards bill (no restrictions, gifts never expire, balance is saved for return visits to same merchant)