TotalRewards Software

Technical Setup

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Technical Setup covers the behind-the-scenes configuration needed to ensure smooth delivery and secure access to TotalRewards Builder. These steps are usually handled by your IT team in coordination with our Support Team and are essential before rolling out statements to employees.

Key components include:

SSO (Single Sign-On):

Simplifies access for employees by using company credentials and supports the latest version of secure authentication.

TotalRewards SAML 2.0 SP Configuration (PDF)

Domain Masking:

Allows emails sent from the portal to display as if they are coming from your company's own domain (noreply@yourcompany.com), rather than the TRS domain (noreply@totalrewards.io). This creates a more professional experience, builds trust with employees, and helps improve deliverability by reducing the chances of emails being marked as spam.

Whitelisting TRS IP Address:

Ensures that promotional emails and login instructions are not blocked or flagged by your company's email security filters. This step is essential to prevent delays or missing communications.

🖥 IT Setup:

1. Connect your **IT team** with our **Support Team** at support@totalrewardssoftware.com.
2. Share the **TotalRewards SAML 2.0 SP Configuration file** with your IT team.
3. Complete set up for **SSO** and **Domain Masking,** and **whitelist TRS IP address**.
4. Perform an **SSO login test** to verify access.
5. **Test** with a sample promotion email to confirm delivery and display.
6. Update **From Email** of the promotions (see Create or Edit Promotions steps).

> 📌 **Note:** IT setup must be completed **before sending promotions** or **launching statements** to employees to avoid access or delivery issues.

⚡ **Quick Steps:** Connect IT with Support → Share SAML file → Set up SSO & Domain Masking →

Whitelist TRS IPs → Test SSO login → Send test promotion → Update From Email