

Heartland Rewards

POS & Rewards Use Cases

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This document is designed to provide guidance to any party wanting to integrate Heartland Rewards. The document will outline the Heartland Rewards programs offered, and provide use cases for Loading and Redeeming Points through integrated POS.

- Automatic Point Load
- Administrative Point Load
- Explicit Point Load
- Points Redeem

REWARDS PROGRAM: AUTOMATIC POINT LOAD

The simplest program available rewards a customer one-point-per-dollar spent. The system sends the Reward API, and the Heartland Gift/Loyalty platform automatically loads the Points onto the customer's stored value account (SVA).

Points will be automatically converted to (USD) when the Point balance reaches a pre-defined threshold. The customer can then Redeem the (USD) funds as a Gift card Redeem. Automatically converting Points to (USD) removes the complexity of a redemption schedule and redeeming Points for select items.

However, there will be instances where Points are not converted to USD, and a Points Redeem must be performed. *(Refer to Points Redeem use case.)*

USE CASE: Automatic Point Load

Heartland Rewards Product	Customer is automatically awarded one Point per dollar spent. Points are awarded automatically via a promotion on the Heartland Gift/Loyalty host.
Actors	Customer, Clerk, POS
Assumptions	<ol style="list-style-type: none"> 1. POS has ability to prompt for SVA Number. 2. POS can print text contain in <notes> parameter. 3. System is processing a non-stored value payment. 4. POS can read Heartland Rewards QR Code.
Steps	<ol style="list-style-type: none"> 1. Customer places order. 2. Clerk enters customer's order 3. Clerk selects Pay to process payment for the order. 4. Clerk accepts payment for order. <p>POS prompts Clerk to capture the customer's SVA number.</p> <ol style="list-style-type: none"> 5. Clerk acquires customer's SVA number by Swipe, Manual Entry, or Scan <p>POS sends payment for order amount. POS receives successful response for order payment. POS sends Reward request. POS receives Reward successful response POS prints receipt with new Gift & Rewards balance, and receipt message contained in the response.</p> <p>Order Closed</p>
Notes/ Comments	<ol style="list-style-type: none"> 1. The SVA must be captured in the payment flow. 2. The Reward API is only to be used with non-stored value payments.

REWARDS PROGRAM: EXPLICIT POINT LOAD (ELECTRONIC PUNCH CARD)

Another consumer-friendly program offered is an Electronic Punch Card. With this program, the customer is rewarded one Point for purchasing a specific item like a coffee drink, a pedicure, or an oil change.

In this instance, the clerk explicitly enters the number of Points that must be loaded onto the customer's SVA. Then the system sends a Load request for the amount entered by the clerk. The currency in this request is Points.

Example: Customer orders Latte, Bear Claw, and Breakfast Parfait and is rewarded one Point for the purchase of the coffee drink.

The customer will be eligible for one free coffee drink once they have purchased (X) number of coffee drinks. The tracking of Points accumulated and redeemed is managed on the Heartland Gift/Loyalty platform. This information is communicated to the customer via the receipt message contained in the response sent back from the Heartland Gift/Loyalty platform.

USE CASE: *Explicit Point Load*

Heartland Rewards Product	The Clerk will manually enter the number of Points to Load on an SVA for the purchase of a specific product(s).
Actors	Customer, Clerk, POS
Assumptions	<ol style="list-style-type: none"> 1. POS has ability to prompt for SVA Number 2. POS can print text contain in <notes> parameter in response. 3. POS has blank field to enter number of Points to Load on SVA. 4. POS can read Heartland Rewards QR Code.
Steps	<ol style="list-style-type: none"> 1. Customer orders Latte, Bear Claw, and Breakfast Parfait from Clerk. 2. Clerk enters customer's order 3. Clerk selects Pay to process payment for the order. 4. Clerk accepts payment for order. <p>POS prompts to capture customers SVA number.</p> <ol style="list-style-type: none"> 5. Clerk acquires customer's SVA number by Swipe, Manual Entry, or Scan 6. Clerk manually enters (1) Point for (1) Latte purchased <p>POS sends payment for order amount. POS receives successful response for order payment. POS sends Load request with currency of Points. POS receives Load successful response POS prints receipt with new Gift & Rewards balance, and receipt message contained in the response.</p> <p>Order Closed</p>
Notes/ Comments	The SVA must be captured in the payment flow.

ADMINISTRATIVE FUNCTION: MANUAL POINT LOAD

Inevitably, a manger or clerk will have to manually load Points onto a customer’s SVA. Sometimes customers do not receive their rewards when they pay for an order, because they forgot their Rewards card. The customer then returns with their card, and wants to have the missed reward amount added to their card.

A manager may also need to load Points manually onto an SVA to resolve a customer service issue.

A manual Point load will have to be added to support these two scenarios.

USE CASE: *Administrative Point Load*

Heartland Rewards Admin Function	The Clerk or Manager will manually enter the number of Points to Load on an SVA for a prior purchase, or to resolve a customer service issue.
Actors	Manager, Clerk, POS
Assumptions	<ol style="list-style-type: none"> 1. POS can print text contain in <notes> parameter in response. 2. POS has blank field to enter number of Points to Load on SVA. 3. POS can read Heartland Rewards QR Code.
Steps	<ol style="list-style-type: none"> 1. Manager/Clerk selects Load Points button. 2. Manager/Clerk acquires customer’s SVA number by Swipe, Manual Entry, or Scan 3. Manager/Clerk manually enters number of Points to load onto SVA <p>POS sends Load request with currency of Points. POS receives Load successful response POS prints receipt with new Gift & Rewards balance, and receipt message contained in the response.</p> <p>Order Closed</p>
Notes/ Comments	<ol style="list-style-type: none"> 1. The SVA must be captured in the payment flow.

LOYALTY REWARDS: POINTS REDEEM

There may be instances where a merchant has setup a Rewards program where Points are not converted to (USD), and the Points on the customer's stored value account must be redeemed.

In this scenario, a merchant has setup a redemption schedule with 1-10 items, which can be purchased with Points. Each item has a specific Point value.

Usually, a Points Redeem button is created on the POS and when selected, renders the items that can be purchased with Points.

USE CASE: *Points Redeem*

Heartland Rewards	The customer wants to Redeem Points from their SVA for item(s) that can be purchased with Loyalty Points.
Actors	Customer, Clerk, POS
Assumptions	<ol style="list-style-type: none"> 1. Merchant's Loyalty Program does not automatically convert Points to USD. 2. POS has ability to prompt for SVA Number 3. POS can print text contain in <notes> parameter in response. 4. POS can read Heartland Rewards QR Code. 5. POS has blank field to enter number of Points to Load on SVA. 6. Items for redemption have been setup with their associated Point value for redemption.
Steps	<ol style="list-style-type: none"> 1. Customer places order for a number of different items. 2. Clerk enters the customer's order 3. Clerk selects Pay to process payment for the order. 4. Customer states they want to pay with their Loyalty Points. 5. Clerk selects Loyalty Pay button. 6. POS prompts to capture customers SVA number. 7. Clerk acquires customer's SVA number by Swipe, Manual Entry, or Scan 8. POS displays item(s) that can be purchased with Loyalty Points. 9. Clerk selects item(s) that can be paid for with Loyalty Points. <p>POS sends Redeem with currency of Points. POS receives Load successful response POS prints receipt with new Gift & Rewards balance, and receipt message contained in the response.</p> <p>POS accepts some other form of tender as payment for the remaining order amount.</p> <p>Order Closed</p>
Notes/ Comments	The POS must be able to support this use case.

OTHER ITEMS

STORED VALUE ACCOUNTS

Heartland stored value accounts are multi-currency accounts. One account can store both (USD) and Points, so there is no need to have multiple cards

CARD SWIPE, MANUAL ENTRY, AND SCAN

The POS must be able to except a stored value account by:

- Swipe
- Manual entry of a 6-20 digit account number.
- Scan of a QR Code
 - The POS must handle QR codes that may contain a card number, or Track1 or Track2 card data.
 - The POS should handle QR code data in the same manner that it currently handles card swipes, and manually entry. The data is the same.

PROMOTION MANAGER

Once Heartland Rewards has been integrated into a POS system, a merchant can take advantage of a myriad of promotion offerings that do not require any further modifications to the POS system. All promotion offerings are managed on the Heartland Gift/Rewards platform with the Heartland Promotion Manager.

The Heartland Marketing Solutions team can setup promotions that automatically award Points based on:

- Spend
- Frequency
- Visits
- Time of Day
- Registration