

A gift card conversion is the process of moving a merchant's existing gift card program from another provider's platform over to the Heartland gift card platform. The conversion process consists of five steps for completion.



STEP 1: Verification

To officially verify that the cards are able to be converted electronically, we will need to receive two physical cards at our Portland office.

Please mail two cards to:

Heartland
c/o Gift Conversion Testing
2035 NW Front Ave, Suite 205
Portland, OR 97209

Include your name and the POS or Terminal type on which the cards should be tested.

Note: any missing information will delay testing

We will confirm receipt when we receive the cards and inform you once testing has been completed. Card testing is currently only performed Tuesdays through Fridays

Tip: If you have access to a Magnetic Swipe Reader (MSR) and a PC, you can email the track data and an image of the front and back of the same card to the conversion team, and we will be able to verify the cards without having to mail physical cards.

STEP 2: Boarding

Boarding of the gift account will need to be completed prior to the conversion date. A signed Heartland Gift Addendum will need to be submitted through Atlas.

- Correct monthly pricing and merchant signatures are required for boarding.
- Contact the Heartland Gift Team at HeartlandGift@e-hps.com or 866.402.8056 with any boarding questions. To navigate to the correct phone line, choose: **2** (RM) or **3** (Dealer) → **1** (Pre-sales support) → **2** (Onboarding Questions) → **2** (Gift Products Documentation).

STEP 3: Scheduling

You will need to request and confirm the scheduling date for the conversion.

The conversion team will not automatically set a conversion date. We will let you know the availability for the week and you will need to relay this information to the merchant to confirm and set the conversion date. Conversions are processed Mondays through Thursdays. Keep in mind that we request a blackout period immediately once we receive a liability report, unless the intent is to provide an updated report on the scheduled date of conversion. The blackout period should be observed until the conversion has been completed. No gift card transactions should take place once the blackout period begins until the conversion is completed.

The conversion team cannot guarantee a specific time on the scheduled conversion date that the conversion will start or end. An email will be sent when the conversion has been completed.

The conversion team is located in PST, so keep that in mind for the expected time frame for the completion of the conversion on the scheduled date.

STEP 4: Liability

The liability report will give the current balances of all gift cards that have been sold by the merchant. A liability report is obtained from the merchant's current processor.

The liability report will need to be provided directly to the conversion team. The data must be in an electronic document with Excel files preferred.

At a minimum, the report needs to include the following:
1) current balance
2) entire card number (if X's or all numbers ending in 0's are present in file, we will request a new file displaying full card numbers).

It is important that the file is current at the time of conversion as we upload the balances based on this reporting. Any transactions that occur after the liability report is obtained will not be reflected on the report being used.

Questions? Contact GiftConversion@e-hps.com or 866.402.8056.

Gift Card Conversion Process Overview (cont.)

While Excel files are faster, Notepad and Word Docs work also. A PDF file is sometimes acceptable but this could cause delays in the conversion as it can be a challenge to correctly convert a PDF file into a usable spreadsheet.

STEP 5: Inventory

Inventory is the unsold cards the merchant has in stock or on hand to sell.

If there are any inventory cards to be converted, and if the cards are numbered sequentially (meaning the last digit on each card is increased by 1), the range providing the first card number on hand to the last card number on hand can be accepted.

If there are any inventory cards to be converted—and the cards are not numbered sequentially—an electronic document with the full card numbers for every card will need to be provided to the team.

Preferred format is Excel, Notepad and Word Docs. Scans, photo copies and pictures will not be accepted, even if they are placed in a PDF or Word document.

CONVERSION FAQ

What is an electronic conversion and when should I recommend it to my merchant?

An electronic conversion is the process of loading competitor gift cards, along with balances, onto the Heartland Gift platform. Once loaded onto the Heartland Gift platform, converted cards function like any other Heartland Gift card with the ability to load/redeem USD/ Purchase Credits/Points and process rewards/promotions.

Eligibility for electronic conversions depends on the compatibility of the previous gift card program to electronically convert cards. Heartland will test the merchant's existing cards to determine conversion compatibility. Electronic conversion is scheduled Monday-Thursday only, excluding holidays.

What is a paper conversion and when should I recommend it to my merchant?

A paper conversion is an option for the merchant when we are unable to convert the cards electronically. This is when a merchant manually moves the balances from their previous processor's cards to a new Heartland Gift card.

This is strongly discouraged when a merchant has multiple locations, which would result in a less than desirable consumer experience, as well as potential reconciliation issues for each location.

Steps include:

1. Customer presents the merchant with the previous competitor's gift card
2. Merchant would manually look up the card number on a liability report to verify the balance
3. Merchant loads the balance onto a Heartland Gift card and then uses the gift card to complete the transaction
4. The previous competitor's card is kept and discarded later by the merchant

How long does a conversion take?

Due to the nature of conversions, an exact timing is variable. Conversions are typically completed by end of the scheduled date. An email notification will be sent out as soon as a conversion is completed. During this time, no gift cards should be processed. Conversions are only scheduled Monday - Thursday, excluding holidays. No Conversions are started on FRIDAY.

Questions? Contact GiftConversion@e-hps.com or 866.402.8056.

Gift Card Conversion Process Overview (cont.)

When does the 2 business day black-out begin and do we need to do anything during that time?

The blackout period begins when the full liability report is generated and should continue until the completion of the conversion. During this time, plans should be made for install upon the completion of the conversion.

What all is needed for a conversion?

We need a full liability report, range or list of inventory cards, a desired date of conversion, the equipment type being used and the expected install date.

How should the liability report/balance file be submitted to Heartland Conversions?

Excel files are preferred. It should list the entire card number and current balance. It's important that the file is up-to-date because we upload the balances based on this reporting. If it's outdated, the merchant could lose product/money. While Excel files are faster, a PDF file is sometimes acceptable. However, this could cause delays in the conversion.

Can converted cards be registered online at [Heartlandgiftcard.com](https://heartlandgiftcard.com)?

Yes, once cards are converted, they are enabled for online registration. However, a PIN must be used to register. For cards that had a liability report with PIN information provided from the previous processor, the PIN on the back of the card will work. If PIN information was not provided in the liability report, an Heartland Gift enabled PIN will be provided on a printed receipt. It is important to note that any terminal/POS that does not support receipt messaging will not be able to provide a PIN.

Can converted cards use a phone-number alias?

Converted cards can be assigned a 10-digit alias (phone number) and should function the same way Heartland cards do today.

Can the PIN code be changed or provided if forgotten?

PINs cannot be changed. If PINs are provided in the liability report from the previous processor, the PIN on the back of the card will be the same for the Heartland Gift platform. However, if PINs are not provided in the file, a new Heartland Gift PIN will be generated and printed on the receipt.

Note: The Heartland Gift Conversion team only has access to PINs provided in the liability report.

How long can an account that was boarded with a conversion stay open without the conversion being finalized?

An account can stay open 90 days after initial boarding. If no conversion or new card order has been completed prior to 90 days from the initial boarding date, the account will be terminated. The account can be re-boarded within 180 days of the original signature with no new paperwork.

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