

Heartland

Restaurant

Built-In Loyalty Setup and Usage Guide

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Date	Product Version	Author	Summary
02/23/2022	7.16	BB	Initial document introduced.
08/05/2022	7.45	JD	POS screenshots updated.

Overview

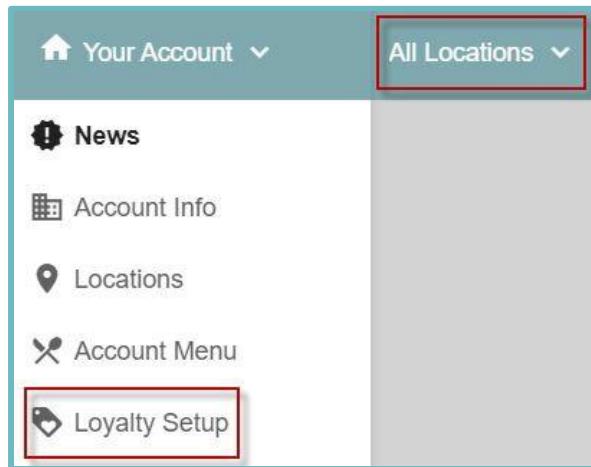
Heartland Restaurant has a loyalty program built directly into the system that allows guests to earn points and rewards for spending money in a given location or locations. By default, the program is account-level, so multi-unit account merchant guests can earn and redeem points across locations under the account. The current program works on a tiered reward option to let the merchant reward their best guests with incrementally better rewards.

The features outlined in this document are supported in the following product tiers:

- Essentials
- Complete

Loyalty Settings

Setup for Loyalty is located in the **Admin Console** on the merchant **Account** when viewing **All Locations** under **Loyalty Setup**.



Multiple Locations

At the bottom right of the **Loyalty Setup**, you can enable or disable loyalty for certain locations on an account with the **Location Overrides** button.

Otherwise, Loyalty will be enabled for all locations by default.

Tippable

This setting should be enabled if you want loyalty rewards to reduce service charges, auto-gratuities, and suggested tip amounts.

Loyalty Interaction Type

Phone Number

This option only allows the Staff Member to enter the **Phone Number** of the guest in the **Info** page of the ticket so that the system can add points to the guest's loyalty account.

Note: The POS will take any phone number entered here, and as a result, it is possible that staff users can enter their own phone number or a fake phone number to the ticket to earn points without the guest knowing. Phone numbers can be black-listed from participation in loyalty if necessary as described in the **Blacklisted Phone Numbers** section.

Scan for Points

This option will only allow customers to accrue points by scanning a QR Code at the bottom of the transaction receipts with their mobile device running the Heartland Guest App.

- ▶ This is the most secure way to allow customers to interact with the loyalty program, since the Heartland Guest App requires the text-based confirmation that the phone number is valid.
- ▶ When using the Guest App, loyalty will use the phone number with Order Now and Skip the Line.

Both

This option will allow the guest user to earn points either by scanning their transaction receipt, or by having their phone number attached to the ticket info page.

List Preview

This area shows how the Merchants Account will appear in the Heartland Guest App to customers.

You can add\update the logo to this card by clicking Set Logo or to the Existing Logo.

Note: This is a customer-facing image.

Display Name

The **Display Name** will be the name of the account as shown in the **Heartland Guest App**.

Note: This is a customer-facing name. Customer Greeting

This field allows the merchant to customize the text that will be displayed to customers via a notification on their mobile device when they are in proximity of the location. To be in range, you will need to be at least in a 90-foot radius.

Note: It is recommended to have the text contain some reference to the merchant location name, as that will help signal to the customer which location they are being greeted by. This text can be changed as often as desired.

Dollars Per Point

The built-in loyalty program is designed to reward customers for the money they spend at a merchant's location(s). The merchant must configure the required spend value to earn 1 point. Ten points must be earned in each reward level.

For example, a Dollars Per Point value of 30 would require the guest to spend \$300 before they earn their first reward.

Note: A recommended option is to award points for smaller amounts spent, and have rewards amounts be small. This benefits the merchant by rewarding their best guest customers and incentivizing them to visit more frequently.

Tags for Excluded Items

This option lets the merchant add **Tags** of items that customers should not accrue points on.

For example, it is illegal in some states to reward customers for purchasing alcohol, so tagging all the alcoholic **Items** and using that **Tag** here would be necessary.

Blacklisted Phone Numbers

Can restrict who can participate in the loyalty program by entering **Phone Numbers** in this blacklist that they do not want accruing points or earning rewards.

For example, it is common for merchants to prevent their staff from participating in the loyalty program.

Cycle Rewards

If enabled, the customer will be reset back to Bronze once they earn their Gold reward.

If disabled, the customer will remain at Gold and continue to earn Gold rewards each time the Points threshold is reached

Rewards Options

When configuring rewards, it is important for the merchant to consider a plan that works for their operation and typical customer. There are 3 reward levels: Bronze, Silver, and Gold. Each level requires the customer to earn and accrue 10 points to earn the reward. Once a user completes a reward level, they move up to the next level.

Setting up an Item Reward

- 1 Select the **Item** option located under the **Bronze**, **Silver**, or **Gold** reward.
- 2 Select if you want the discount as a **percentage** or **dollar** amount. 
- 3 Input the amount in the field.
- 4 Select the **Tag** that the discount will affect.
 - ▶ If no tag is selected, any item can be applied for the reward.
- 5 Enable or Disable if the reward will affect modifiers.

Setting up a Ticket Reward

- 1 Select the **Ticket** option located under the **Bronze**, **Silver**, or **Gold** reward.
- 2 Select if you want to discount as a **percentage** or **dollar** amount.
- 3 Input the amount in the field.

An example of rewarding guests better the more they spend, would be to set a bronze reward of \$5, silver of \$7, and gold of \$10.

Max Scans Allowed Per Day

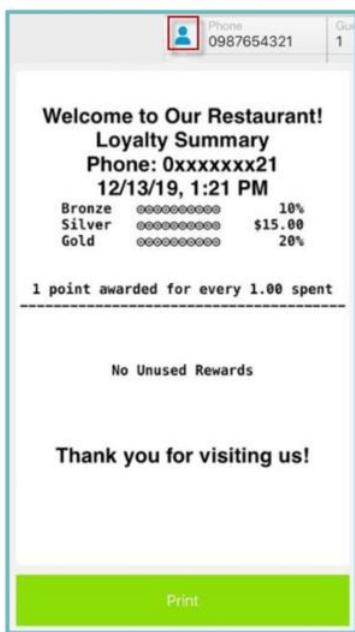
This option lets the merchant determine how many scan interactions a user can perform in a 24-hour period. This can be useful to prevent loyalty fraud by staff users who may attempt to reprint transaction receipts and scan them at the end of the day in the hopes of accruing loyalty points for money they did not actually spend. The minimum number is one and the maximum is 5.

Loyalty Usage

Heartland Restaurant App

Applying loyalty points through the POS

- 1 Open the desired **Ticket** or a **New Ticket**.
- 2 Select **Info** option from the **Left-Handed menu**.
- 3 Tap **Phone** and enter the **Phone Number** of the customer **or** tap the **Guests In Range** icon  if the customer is using the **Heartland Guest App**.
 - ▶ If you tap on **Phone**, then type a phone number, you will then have the option to tap the **Person** icon to the left of the number to see what points/rewards the customer currently has.



If using the **Guests in Range**, tap on the customer in range, then select the information to be applied for the customer on the left. Once you tap the information, it will be applied to the ticket

- 4 Add items to the ticket.

Note: The restaurant might have some items that do not have items that apply to loyalty.

- 5 Select Checkout

- 6 Tender out the ticket
- 7 Make sure the ticket is closed

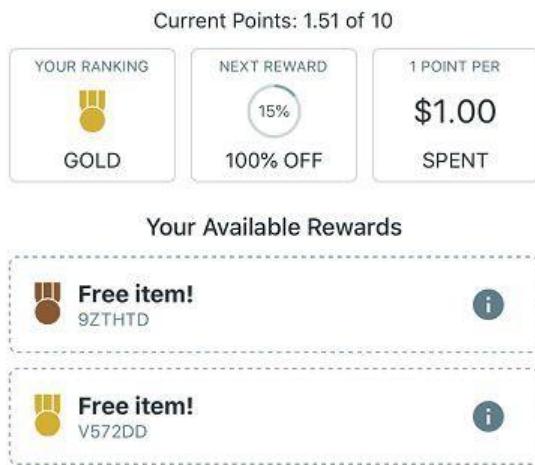
Important: If the ticket is still open and not closed with a payment, loyalty points will not be added until the ticket is fully paid and closed.

- 8 Loyalty points will be awarded and may take up to 24 hours to be able to be used.

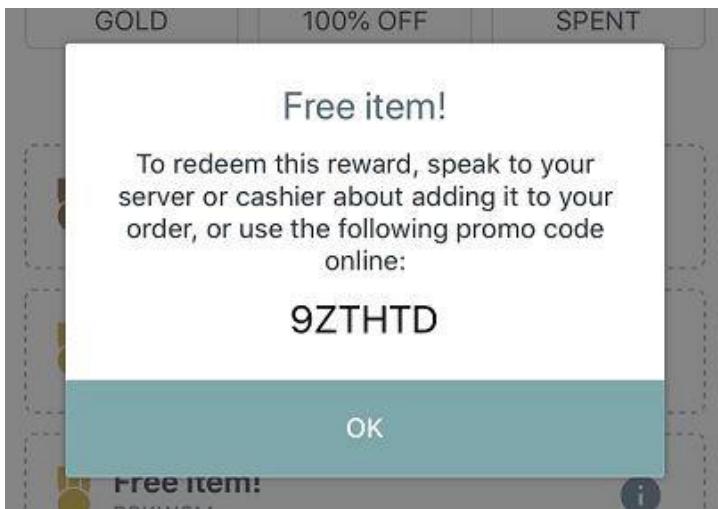
Checking Points and Rewards on the Guest App

To see available points and rewards with the Guest App

- 1 Tap on **Explore**
- 2 Scroll or search for the location.
- 3 When looking at the Location, it will show you **Your Ranking** and a percentage to the **Next Reward**.
- 4 For more information, tap on the Location
- 5 Once the Location is loaded, the Guest App will display your **Current Points**, **Your Ranking**, percentage to **Next Reward**, and 1 point per dollar spent.
- 6 Scrolling down more will display Your Available Rewards that you can currently use.

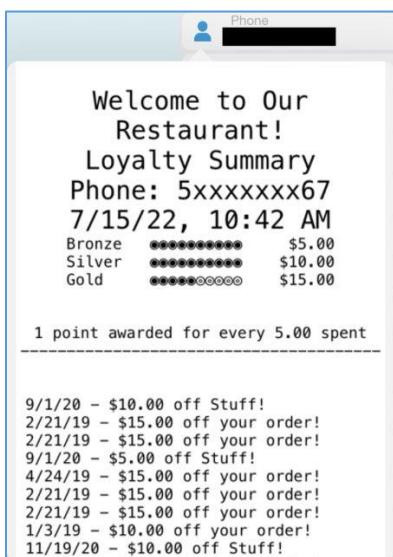


- 7 You can also view more info for each reward by tapping the information button.



Checking Points and Rewards at the POS

To see available rewards/points at the POS a Staff Member would need to tap the **Person** icon that appears to the left of the Phone number in the **Ticket Info** screen. A preview will display where you can view and/or print a summary of points and available rewards for the customer.



Redeeming Ticket-Based Rewards

- 1 Select the **ticket** for that customer. Ensure the **phone number** has been entered into the **Ticket Info** screen.
- 2 Select **Checkout**, you will notice a **medal** icon on this button indicating rewards are available.

 Checkout

3 On the **Checkout** screen select **Adjust**, you will see a **medal icon** on the button as well.

 Adjust

4 In the **Adjust** screen you will see available rewards listed. Select one to apply it to the **Ticket**. In this example this customer has two rewards saved up.

Gold Reward
\$15.00Silver Reward
\$10.00

Redeeming Item-Based Rewards

- 1 Select the **ticket** for that customer. Ensure the **phone number** has been entered into the **Ticket Info** screen.
- 2 Select the **item** to apply the reward to.
- 3 Select **Discount** if rewards are available you will see a **Medal** icon on the button.

 Discount

- 4 Select the desired **Reward** to apply it to the **item**.

Redeeming Rewards on Guest App

- 1 Navigate to the **location** you have rewards for.
- 2 Add qualifying items to your order.
- 3 Tap **Checkout**.
- 4 From here, you can Tap “**+ Add a reward**”.

1 Cheeseburger \$4.99

Small

+ Add an item

+ Add a reward

5 Select the **reward** you want to apply.

Select a reward to apply to your order.

 **Free Burgers!**

 **5% off your order**

6 If the reward matches the qualifying item or ticket, it will apply the discount or adjustment.

- If the reward doesn't qualify, the guest app will say the reward does not match the requirements.

1	Cheeseburger	\$4.99
	Small	

1	Bronze Reward Free Burgers!	- \$4.99
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[+ Add an item](#)