

springbig  +  dutchie

POS guide

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configuration

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onboarding steps

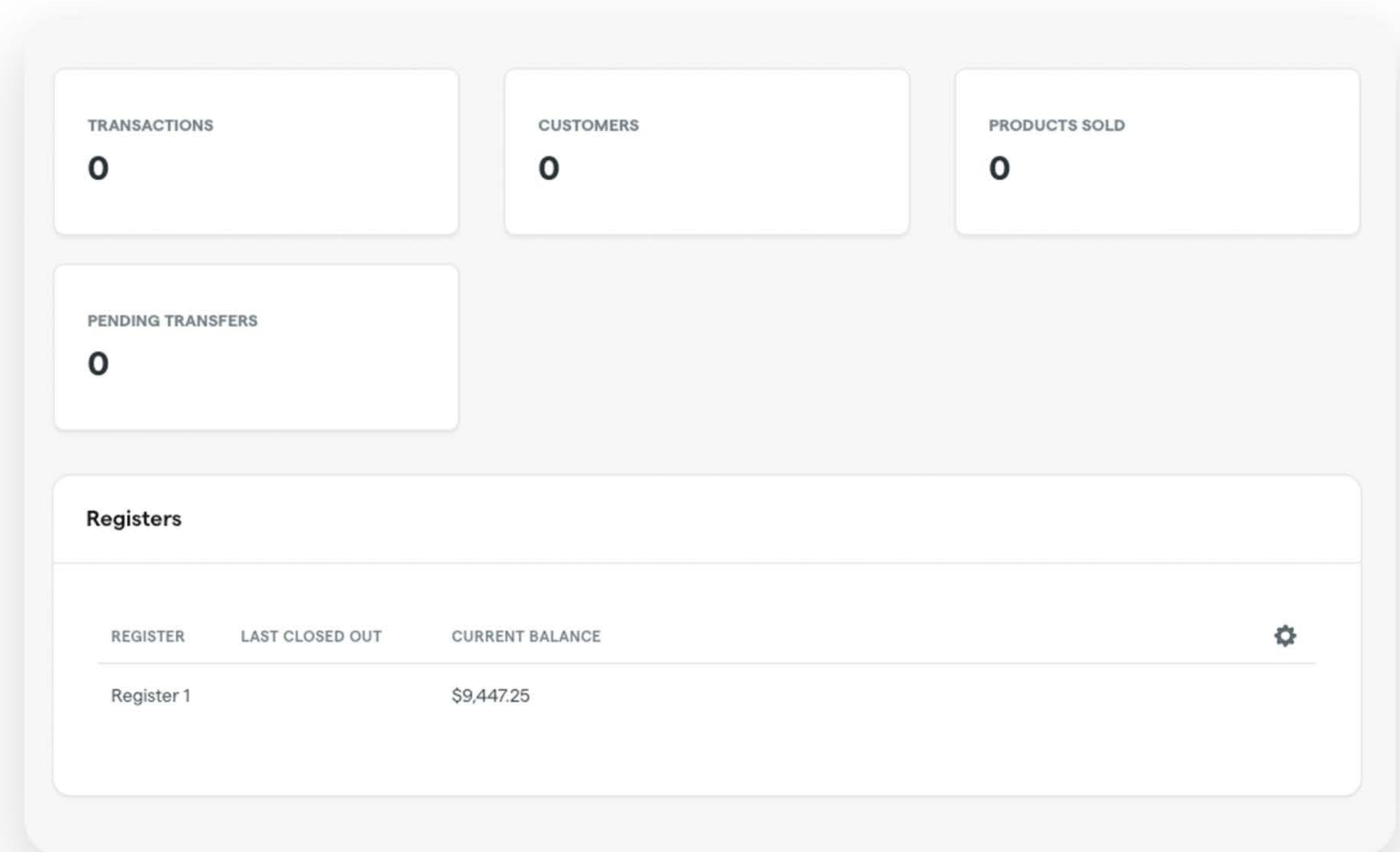
Please reach out to your Dutchie representative to have springbig enabled before your launch date. Also, if using springbig loyalty, let them know to disable all Dutchie POS loyalty, otherwise, the overall springbig loyalty experience won't function properly

onboarding steps

to begin the process, you will need to have access to the **dutchie** backoffice page to configure your **springbig** connection. **springbig** will need to have access to your **dutchie API key** to enable enhanced features like:

- ☒ 2-way member sync
- ☒ historical order retrieval
- ☒ access location names

note: if you are going to be connecting to the **dutchie POS integration**, you will first need to get access to the **dutchie backoffice** page and configure those settings



The screenshot shows a dashboard with four summary cards: TRANSACTIONS (0), CUSTOMERS (0), PRODUCTS SOLD (0), and PENDING TRANSFERS (0). Below these is a 'Registers' section containing a table with columns: REGISTER, LAST CLOSED OUT, and CURRENT BALANCE. The table has one row for 'Register 1' with a current balance of '\$9,447.25'. A settings gear icon is visible in the top right of the registers section.

Registers			⚙️
REGISTER	LAST CLOSED OUT	CURRENT BALANCE	
Register 1		\$9,447.25	

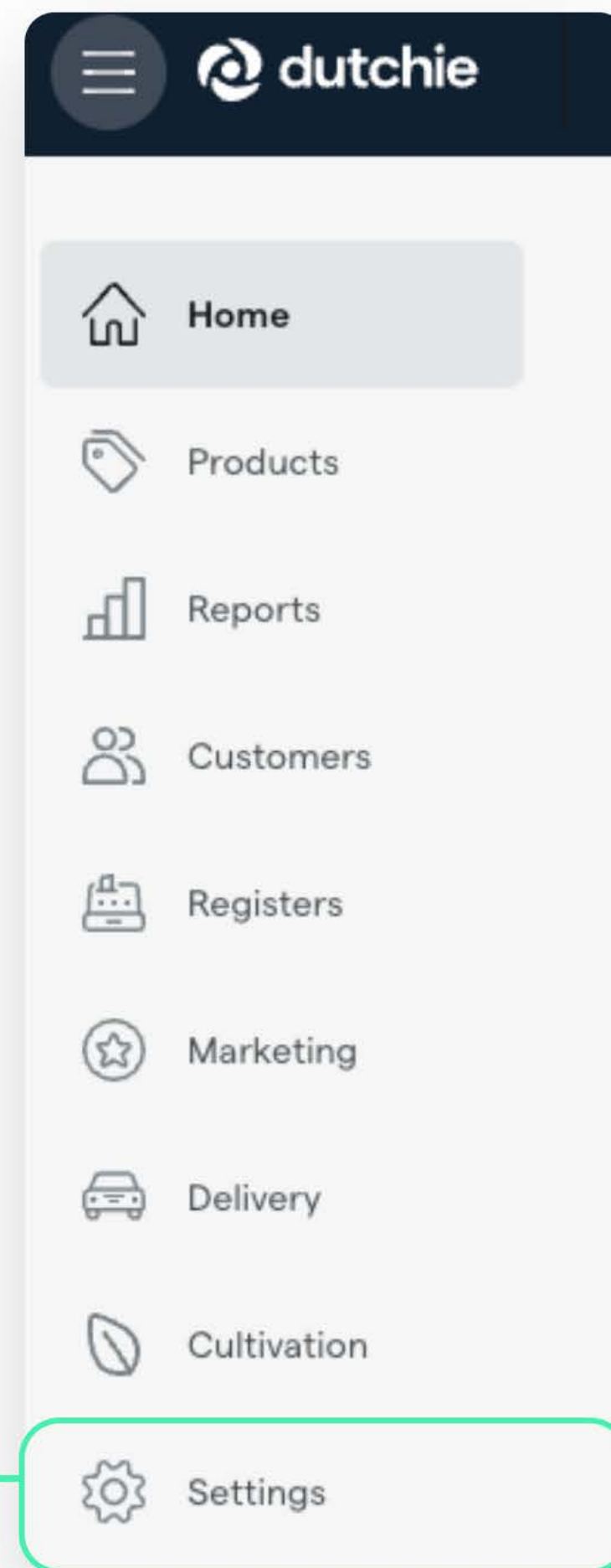
configuration steps

once you have accessed the **dutchie** backoffice home page, you will need to navigate to the **integrations settings** page, where you can choose which settings to enable and enter the proper information to connect to your **dutchie POS**

step 1



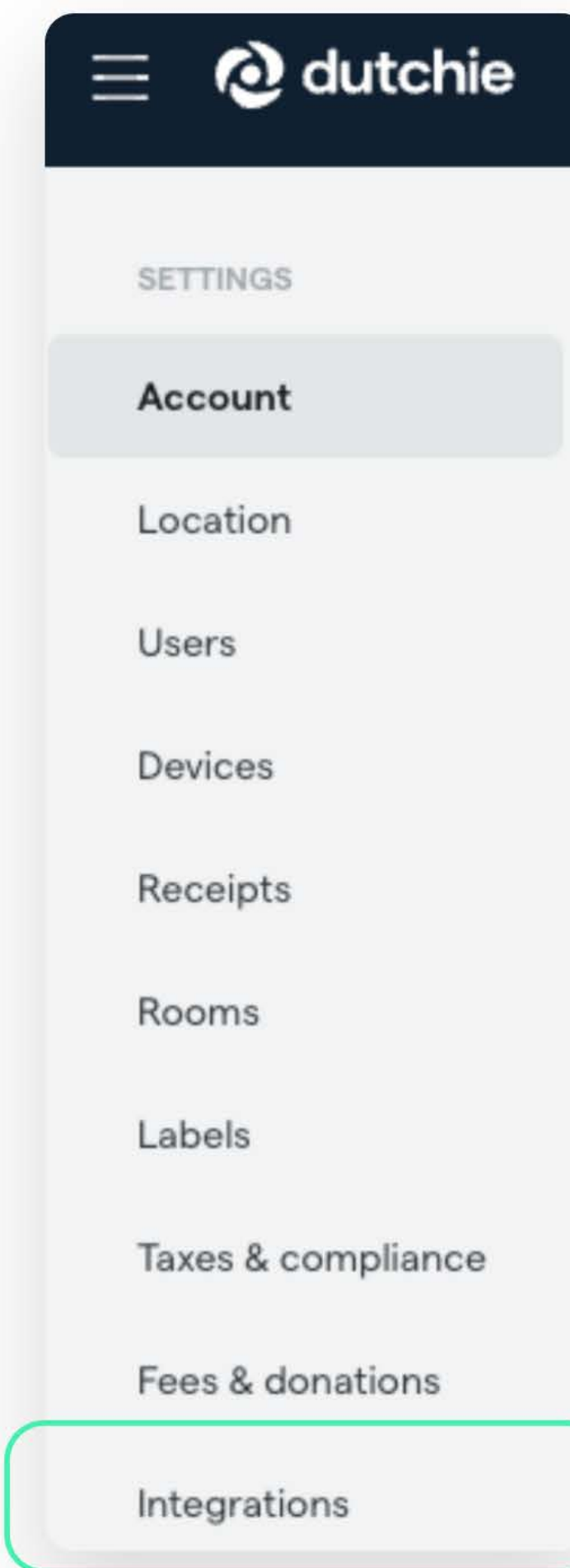
on the left side of the page under the menu, select **settings**



step 2

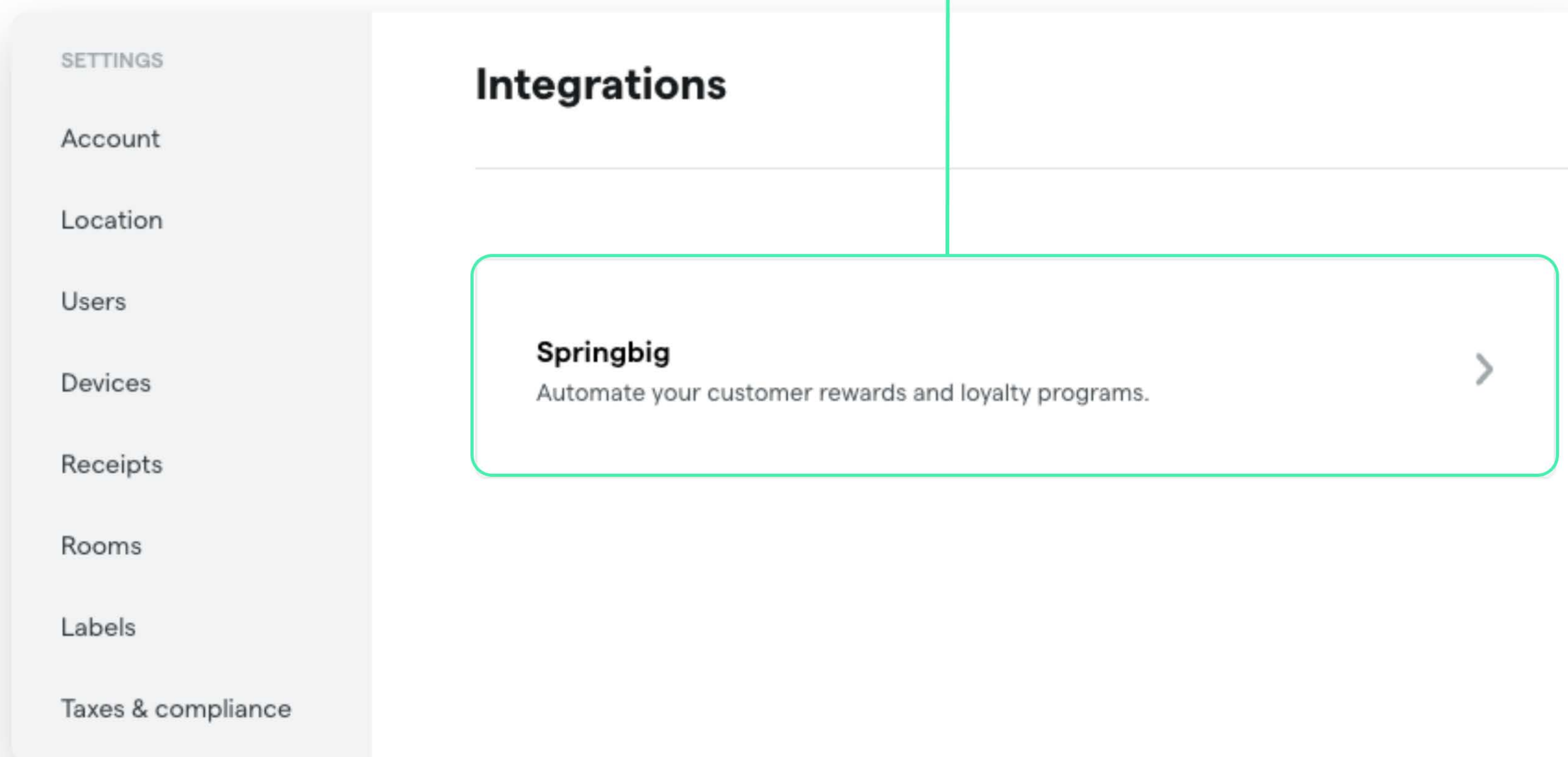


from **settings**, select **integrations**



step 3

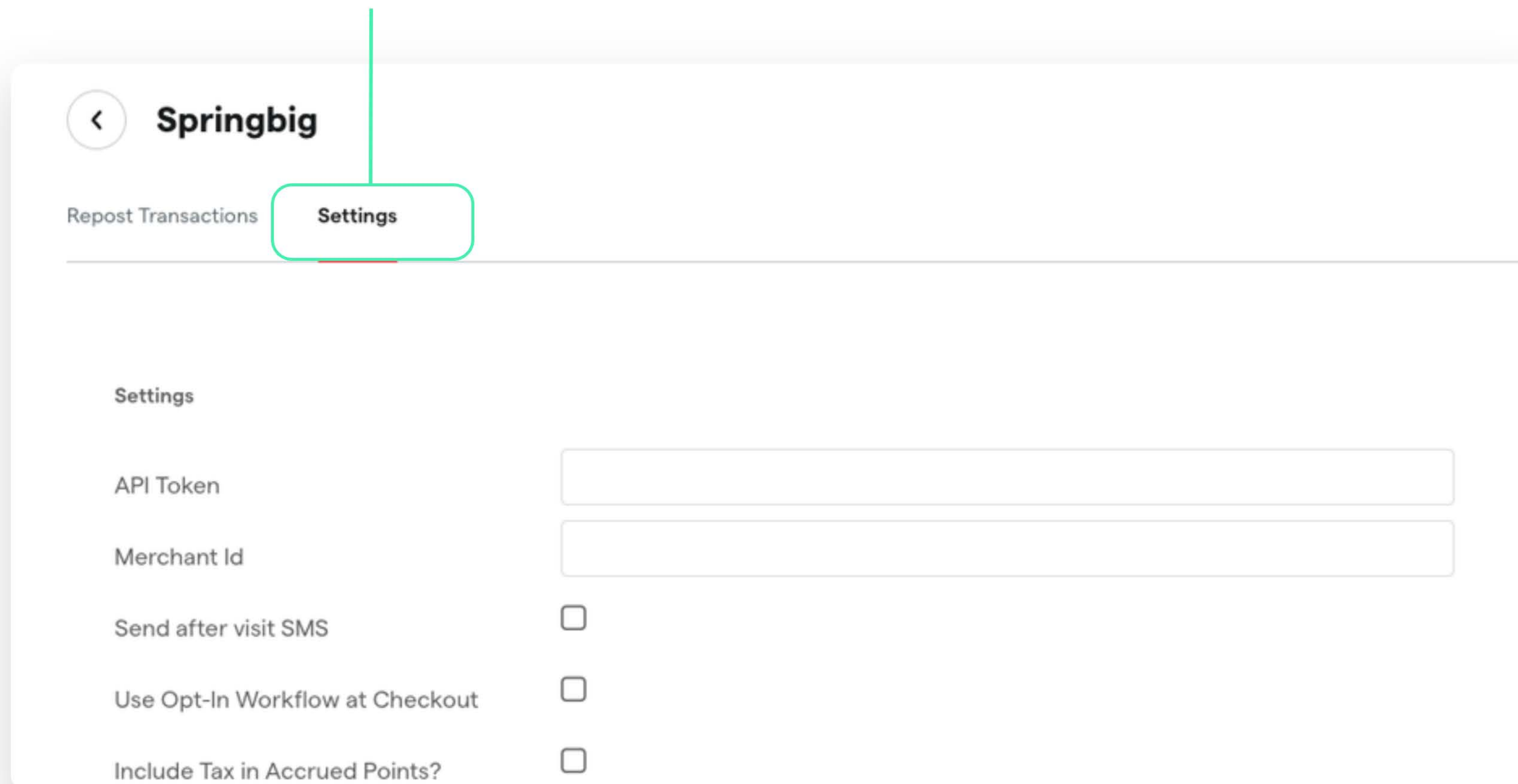
once **integrations** is selected, click on **springbig**



step 4



under **springbig**, select **settings**



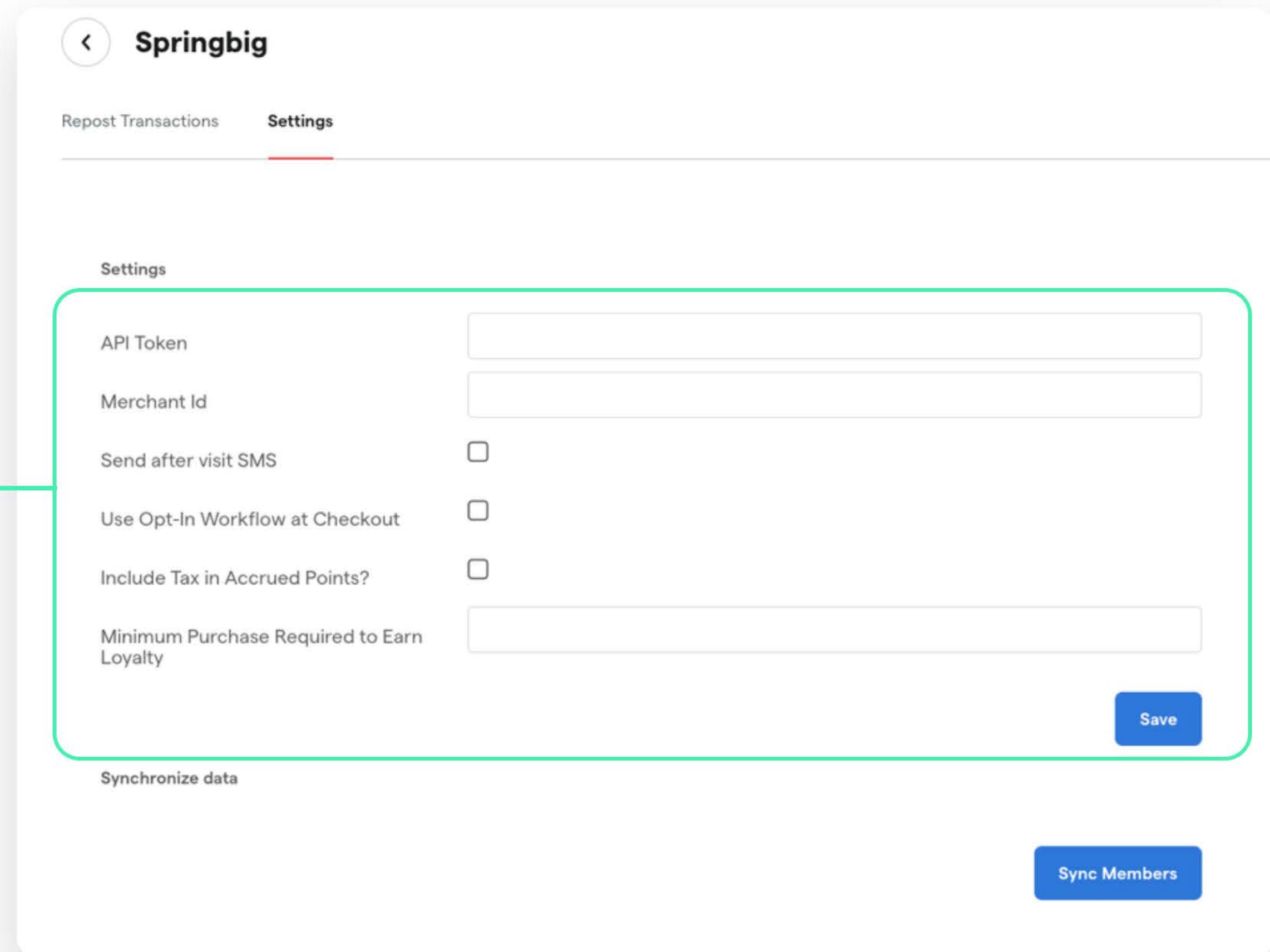
The screenshot shows the 'Springbig' settings page. At the top, there is a back arrow and the title 'Springbig'. Below the title, there are two tabs: 'Repost Transactions' and 'Settings'. The 'Settings' tab is selected and highlighted with a green border. A green line connects the 'Settings' tab to the text 'select settings' above it. Below the tabs, the 'Settings' section is displayed. It contains four rows of settings:

Settings	
API Token	
Merchant Id	
Send after visit SMS	☐
Use Opt-In Workflow at Checkout	☐
Include Tax in Accrued Points?	☐

step 5



on this page, you can fill out the necessary information needed to **activate the integration**, and choose which settings you would like to have **enabled**



< Springbig

Repost Transactions Settings

Settings

API Token

Merchant Id

Send after visit SMS ☐

Use Opt-In Workflow at Checkout ☐

Include Tax in Accrued Points? ☐

Minimum Purchase Required to Earn Loyalty

Save

Synchronize data

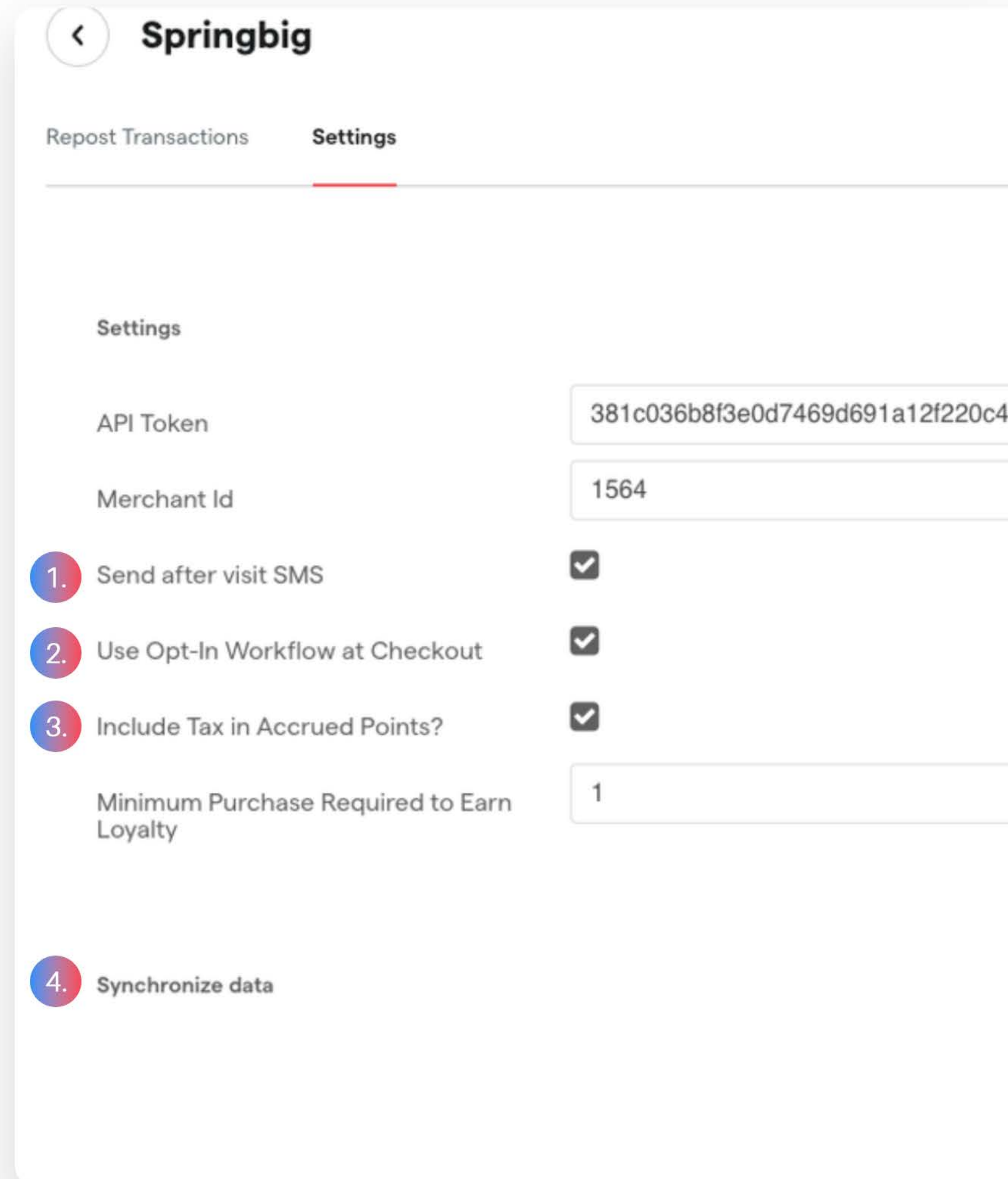
Sync Members

step 5



continued

1. **send after visit** - **springbig** will send our default after visit notification as long as POS after visit is enabled on the **springbig** side
2. **user opt-in work flow at checkout** - **springbig** check box will appear at the checkout page for a new customer, the check box must be enabled for dutchie POS to share the member's data
3. **include tax in accrued points** - loyalty points calculated at the end of the visit will also take the tax and final paid amount into account
4. **synchronizing member data** - click the **sync members button** on the bottom right of the window. once clicked, it searches all customers to see if they are enrolled in loyalty and are pre-existing **springbig** members

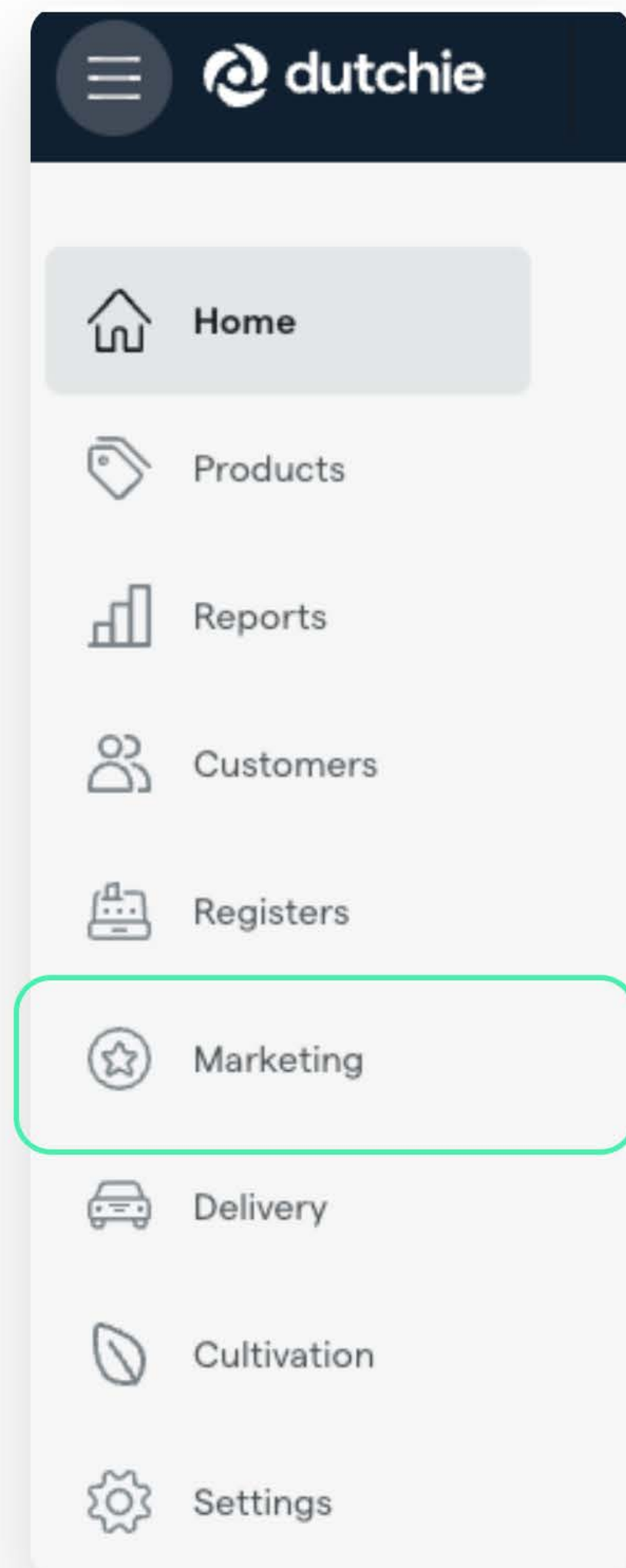


The screenshot shows the 'Springbig' settings page. At the top, there's a back arrow and the title 'Springbig'. Below the title are two tabs: 'Repost Transactions' and 'Settings', with 'Settings' being the active tab. The settings are organized into sections. The 'Settings' section includes fields for 'API Token' (381c036b8f3e0d7469d691a12f220c4c) and 'Merchant Id' (1564). Below these are three toggle switches, each with a numbered step indicator: '1. Send after visit SMS' (checked), '2. Use Opt-In Workflow at Checkout' (checked), and '3. Include Tax in Accrued Points?' (checked). There is also a field for 'Minimum Purchase Required to Earn Loyalty' with the value '1'. At the bottom, there is a button labeled '4. Synchronize data'.

note: if the member is not opted into loyalty, a search will be done to see if they are in the **springbig** platform. the member will then be opted into loyalty if they are already in the platform, or a new member will be created with allowed loyalty check.

discount configuration

to create a discount that is functioning in both **springbig** and **dutchie**, the discount will need to be created on both sides with a matching **discount ID**



step 1 

on the **dutchie backoffice**, select **marketing** on the left menu of the screen

Discounts

Search discounts...

Status ▾

Type ▾

ID	NAME	STATUS	CODE	TYPE	START	END	⚙
1010	maria testing discount	Active	1010	SpringBig	06/05/2020	05/11/2023	...
9679	10 dollars off	Expired	9679	SpringBig	01/21/2021	09/30/2022	...
SB10	SB \$10	Expired	SB10	SpringBig	03/29/2021	03/29/2022	...
RWD:VisitMilestone	Visit Milestone - 15% OFF \$100 or more	Active		SpringBig	01/26/2022	01/31/2025	...
11884	67 % off	Expired	67%off	SpringBig	01/23/2022	01/31/2022	...
memoffer1	mem offer1 10% off	Expired		SpringBig	05/08/2022	05/31/2022	...
TODAY10	Today 10% off	Expired		SpringBig	06/13/2022	06/30/2022	...
BT1235	5 off	Expired		SpringBig	06/13/2022	06/30/2022	...
123456	new member offer	Expired		SpringBig	09/06/2022	09/28/2022	...

< 1 >

Displaying 1 - 12 of 12

100 ▾

Per page

step 2 select **create discount**

< **Create discount**

Details

Options

Strains

Categories

Brands

Vendors

Name: *

Code: i

Start: * i

End: * i

Application method: * i

Select option... ▼

Discount type: *

▼

Discount amount: * i

\$ 0

step 3



next, fill out the information for your **discount**

< **15 dollars off**

Details

Options

Strains

Categories

Brands

Vendors

Wei

Name:*

15 dollars off

Code: ⓘ

Start: * ⓘ

01/21/2021 12:00 PM

End: * ⓘ

11/30/2023 12:00 AM

Application method: * ⓘ

By SpringBig

Discount ID:

1515

Discount type:*

Amount off price

Discount amount: * ⓘ

\$ 15

Save

Advanced options

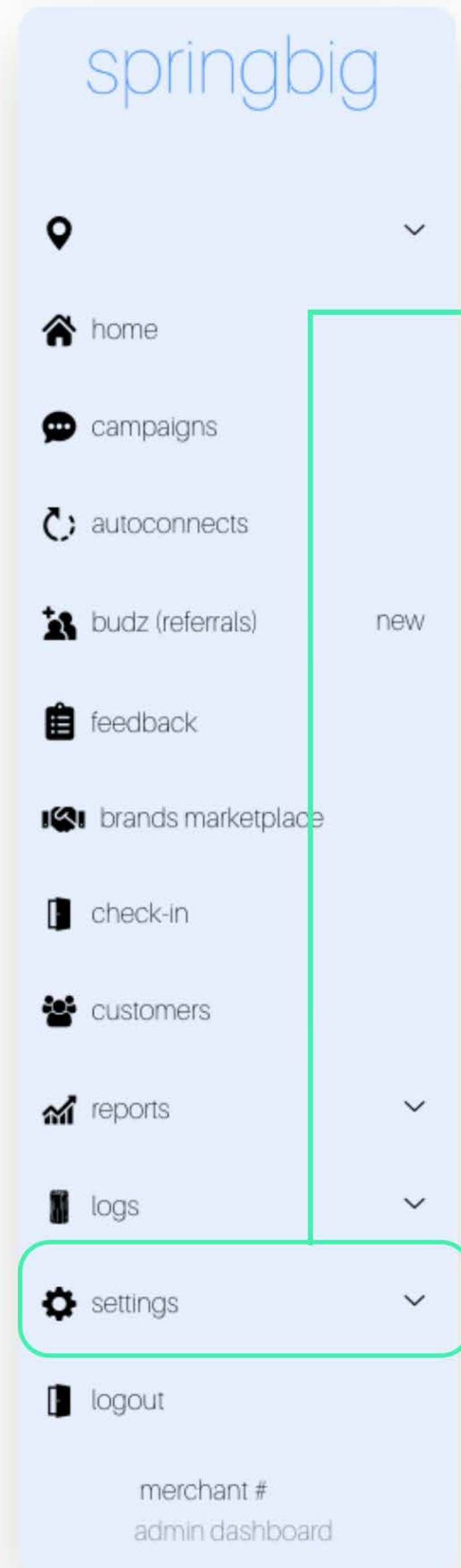
step 4



make your **discount ID** name unique, also ensure that you remember the name of the **discount ID**

note: you will need to use the **same discount ID** in the **springbig** platform

note: it is advisable in case to reach out to your account manager to assist setting up your springbig discounts



step 5

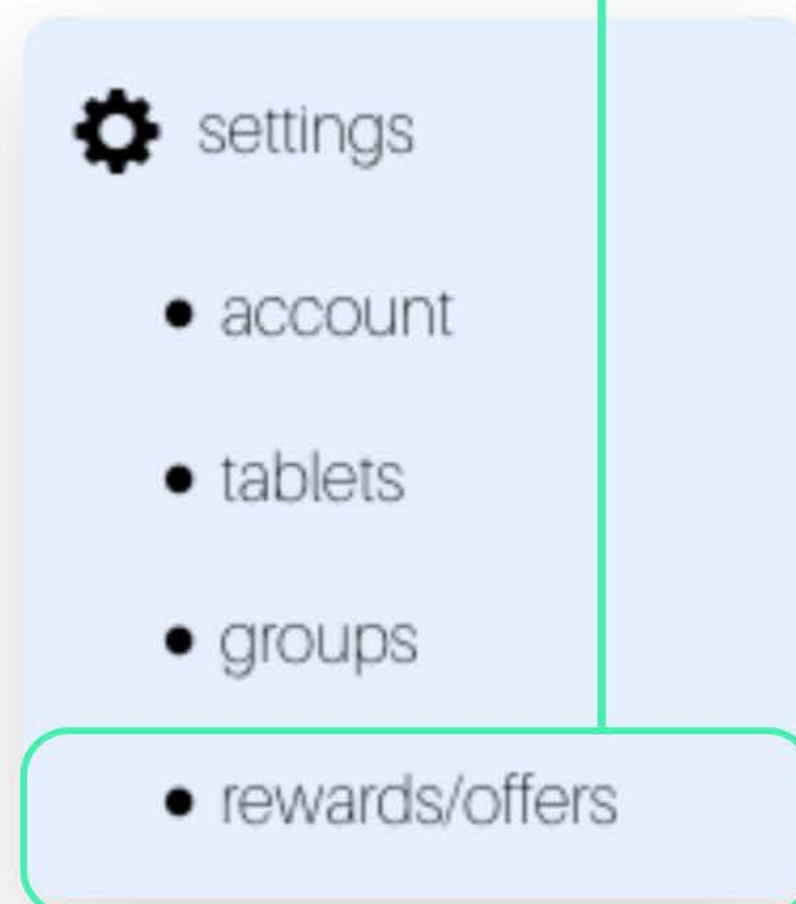


on the **springbig** merchant platform, choose **settings** from the menu drop down

step 6



next, select **rewards/offers**



step 7



once on the rewards/offers page, select **+ new reward**



reward name

New Reward

reward description (optional)

reward description (optional)

reward value

1

POS discount ID (optional)

POS discount ID (optional)

▼

0.00

☐

active

add display image

add coupon image

update

delete reward

step 8



fill out the **reward/discount** with the same information as you previously created on **dutchie**

step 9

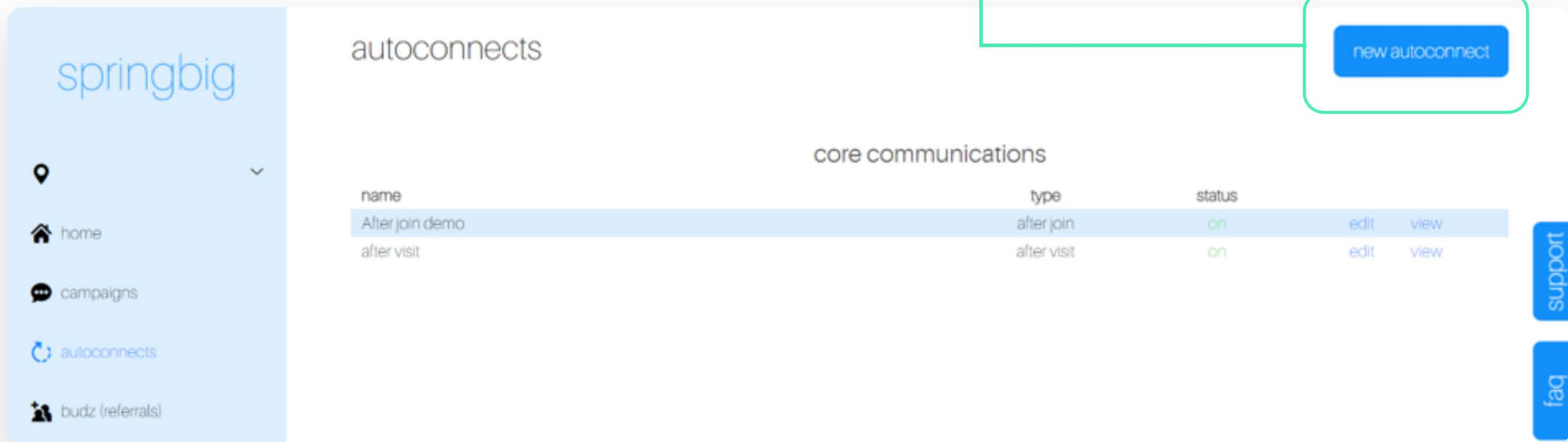


ensure the **discount ID** field is identical to the one created on **dutchie**

note: once you click **update**, the discount should be fully functional in both the **springbig** and in the **dutchie** platforms

step 10 

follow the same steps for [campaign](#), [autoconnect](#) and [member offers](#). autoconnect offer configuration is outside the reward/offer page



The screenshot shows the SpringBig dashboard with a sidebar on the left containing navigation links: home, campaigns, autoconnects, and budz (referrals). The main content area is titled 'autoconnects' and features a table of 'core communications'. The table has columns for name, type, status, edit, and view. Two rows are visible: 'After join demo' and 'after visit', both with a status of 'on'. A blue button labeled 'new autoconnect' is located in the top right corner of the main content area, highlighted by a green box and a line pointing to it from the text above.

name	type	status	edit	view
After join demo	after join	on	edit	view
after visit	after visit	on	edit	view


track offer


target wallet


any link

offer type

digital voucher

bonus points

instant points

offer for customer

100 points

offers per customer

1 ▼

offer expires after

days

POS discount ID (optional)

POS discount ID (optional)

▼ 0.00

step 11

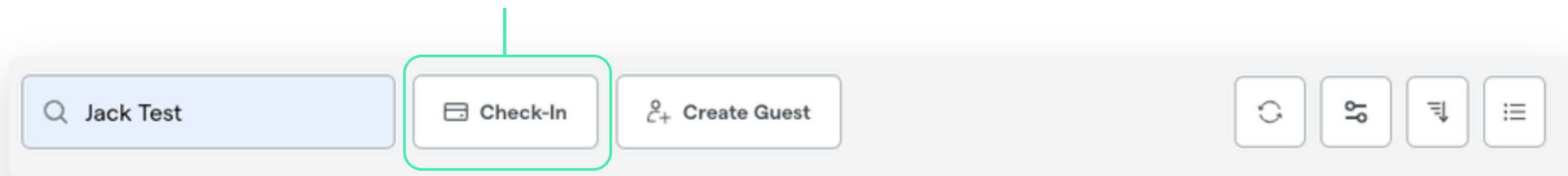
direct to the intended autoconnect and configure the [offer/digital voucher](#) repeating the same steps as a [reward](#), with the addition of including an expiration date and amount of offers per customer

visit flow

for a visit to be recorded and shared with the [springbig](#) platform, the member that is purchasing products will need to be enrolled in the [springbig loyalty program](#)

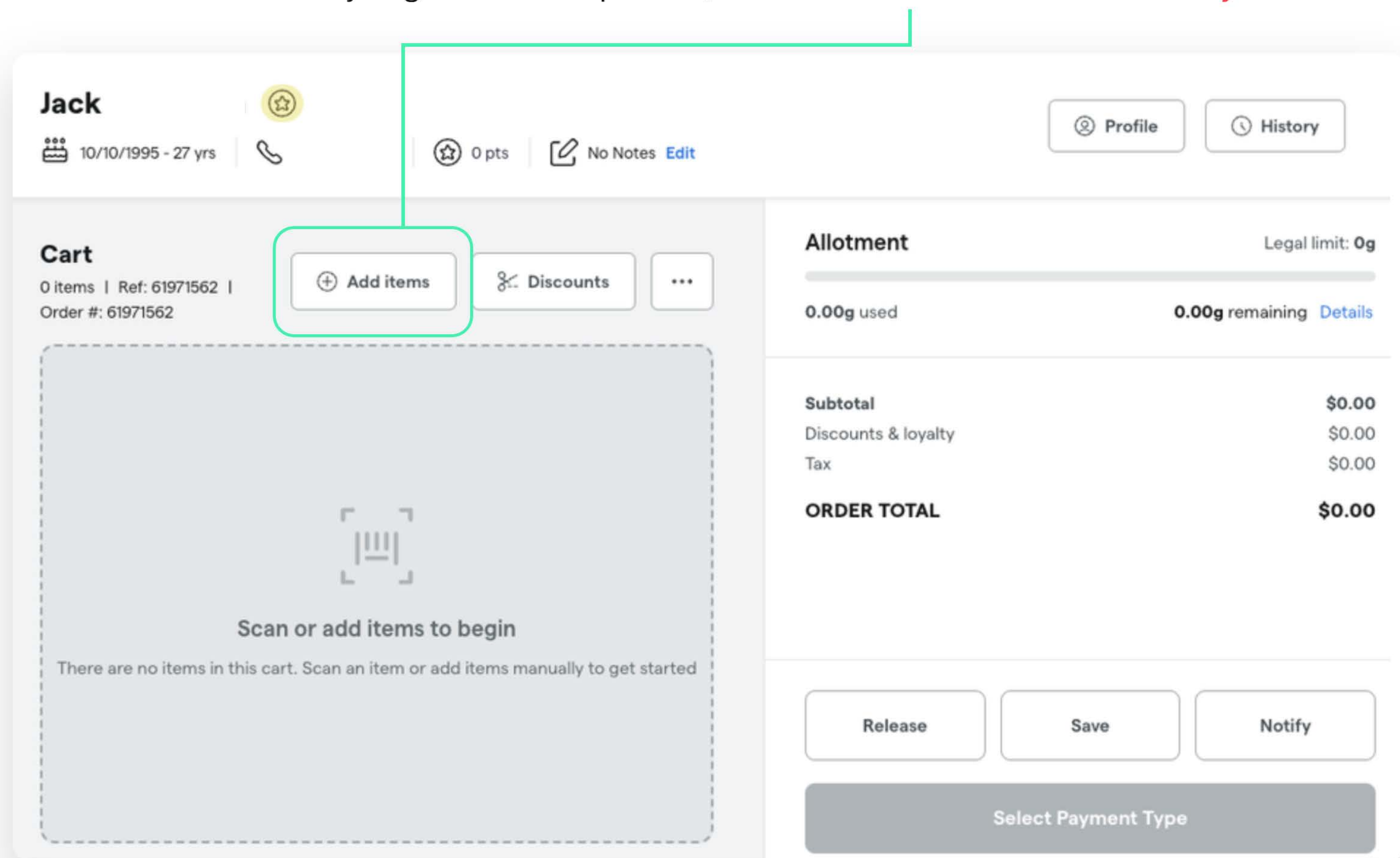
step 1

when a member enters the dispensary, their profile will need to be accessed within the [POS](#) and [check in](#). if they do not have a profile yet, refer to the section on creating a members sign up on page 27 of this guide



step 2

once the member is checked in and they begin their order process, items can be added to their cart from **your inventory**



The screenshot displays the Dutchie app interface for a user named Jack. The top section shows the user's profile with a star icon, birthdate (10/10/1995 - 27 yrs), and contact information. Below this, the 'Cart' section is highlighted with a green box around the 'Add items' button. The cart is currently empty, showing '0 items' and 'Ref: 61971562 | Order #: 61971562'. A large dashed box in the center of the cart area contains a barcode icon and the text 'Scan or add items to begin' and 'There are no items in this cart. Scan an item or add items manually to get started'. To the right of the cart, the 'Allotment' section shows '0.00g used' and '0.00g remaining' with a 'Details' link. Below this, the 'Subtotal' is \$0.00, 'Discounts & loyalty' is \$0.00, 'Tax' is \$0.00, and the 'ORDER TOTAL' is \$0.00. At the bottom, there are three buttons: 'Release', 'Save', and 'Notify', followed by a large grey button labeled 'Select Payment Type'.

Jack
10/10/1995 - 27 yrs
0 pts | No Notes [Edit](#) | [Profile](#) | [History](#)

Cart
0 items | Ref: 61971562 | Order #: 61971562
[+ Add items](#) | [Discounts](#) | [...](#)


Scan or add items to begin
There are no items in this cart. Scan an item or add items manually to get started

Allotment Legal limit: 0g
0.00g used | 0.00g remaining [Details](#)

Subtotal \$0.00
Discounts & loyalty \$0.00
Tax \$0.00
ORDER TOTAL \$0.00

[Release](#) | [Save](#) | [Notify](#)
[Select Payment Type](#)

step 4

once you have added the items to the cart, you can **close** the catalogue and click on **select payment type** to complete the transaction

Jack Testerson 

 10/10/1995 - 27 yrs |  305-634-5741 |  0 pts |  No Notes [Edit](#)

Cart

11 items | Ref: 61971562 | Order #: 61971562

T-Shirt

 00010

-

6

+

\$150.00

...

Bic Lighter

 00012

-

5

+

\$25.00

...

+

 Add items

 Discounts

...

Allotment

Legal limit: 0g

0.00g used

0.00g remaining [Details](#)

Subtotal

\$175.00

Discounts & loyalty

\$0.00

Tax

\$0.00

ORDER TOTAL

\$175.00

Release

Save

Notify

Select Payment Type

step 5

to finish up the transaction, you can choose either **cash** or **debit** depending on the payment method the member wishes to utilize

 **Select payment type**


Cash


Debit

Order details

Subtotal

\$175.00

Discounts & loyalty

\$0.00

Tax

\$0.00

ORDER TOTAL

\$175.00

Pay

step 6

once their payment method is selected,
you will be **required** to enter the
amount to offset the **order total**

 **Cash**

\$ Enter Amount

Add

Exact Cash

\$20

\$40

\$60

\$100

Order details

Subtotal

Discounts & loyalty

Tax

\$175.00

\$0.00

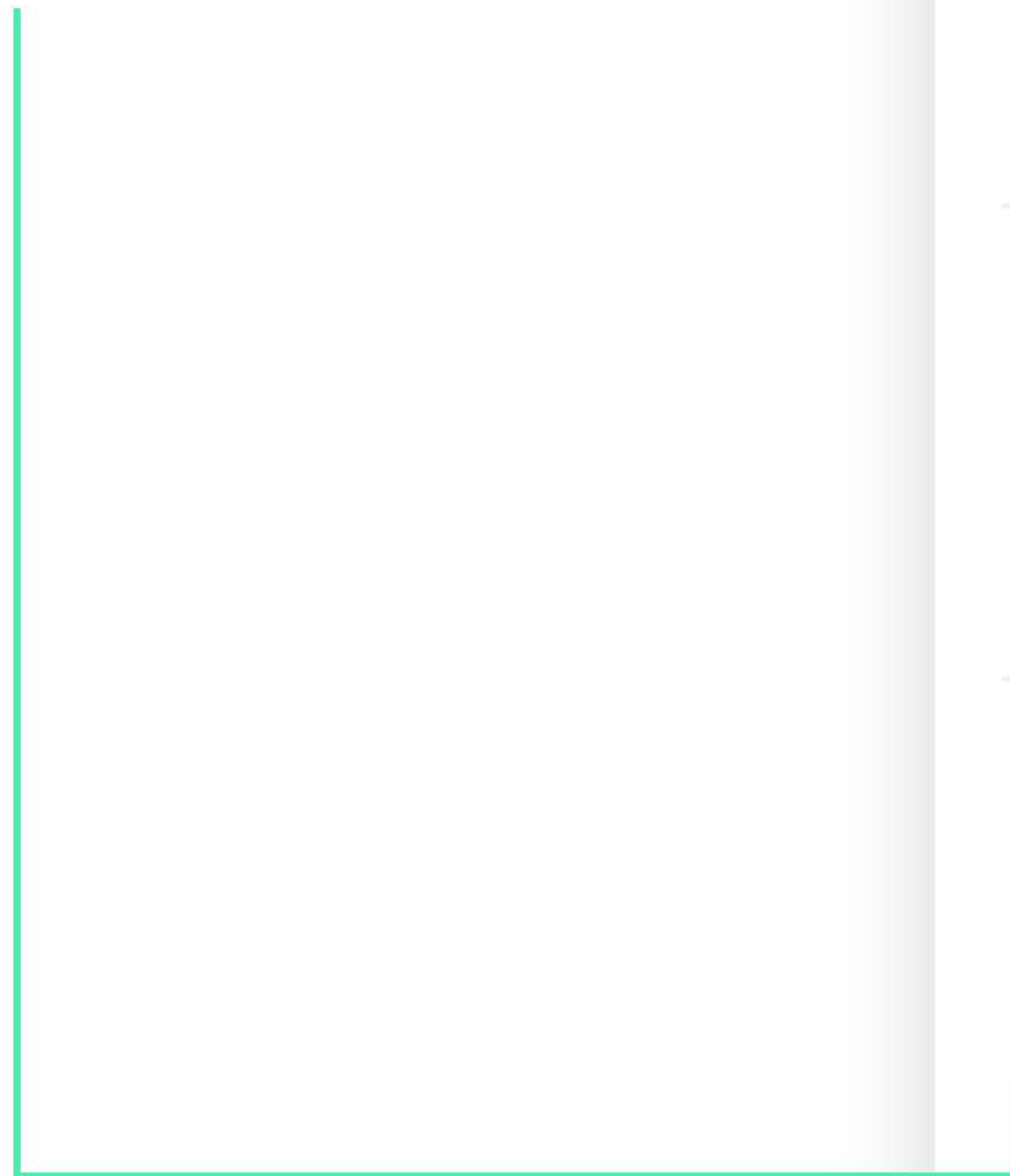
\$0.00

ORDER TOTAL

\$175.00

step 7

once completed, click **pay** on the bottom of the page to complete the transaction



 **Select payment type**


Cash


Debit

Payments

Cash

\$175.00



Order details 

Subtotal

\$175.00

Discounts & loyalty

\$0.00

Tax

\$0.00

ORDER TOTAL

\$175.00

Payment

\$175.00

Pay

step 8



when finished, you will be brought to the **payment successful** window, this will confirm the transaction has been successfully completed. from here select **done**

 **Payment successful!**

Send

 Print receipt Print labelOrder details 

ORDER TOTAL \$175.00

PAID \$175.00



Change due

\$0.00

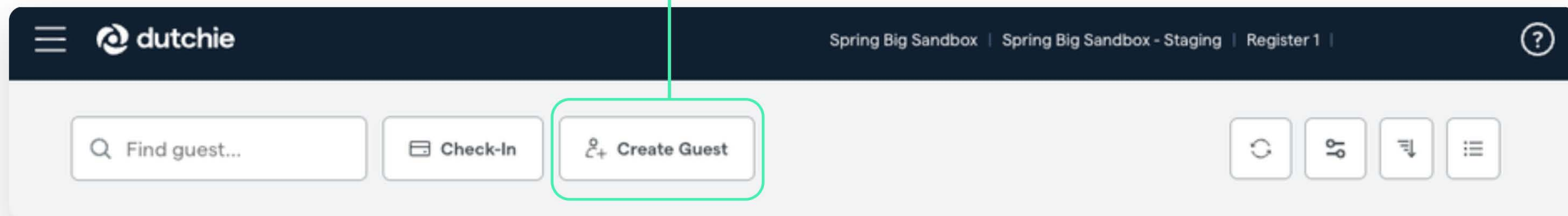
Done

member sign up

step 1

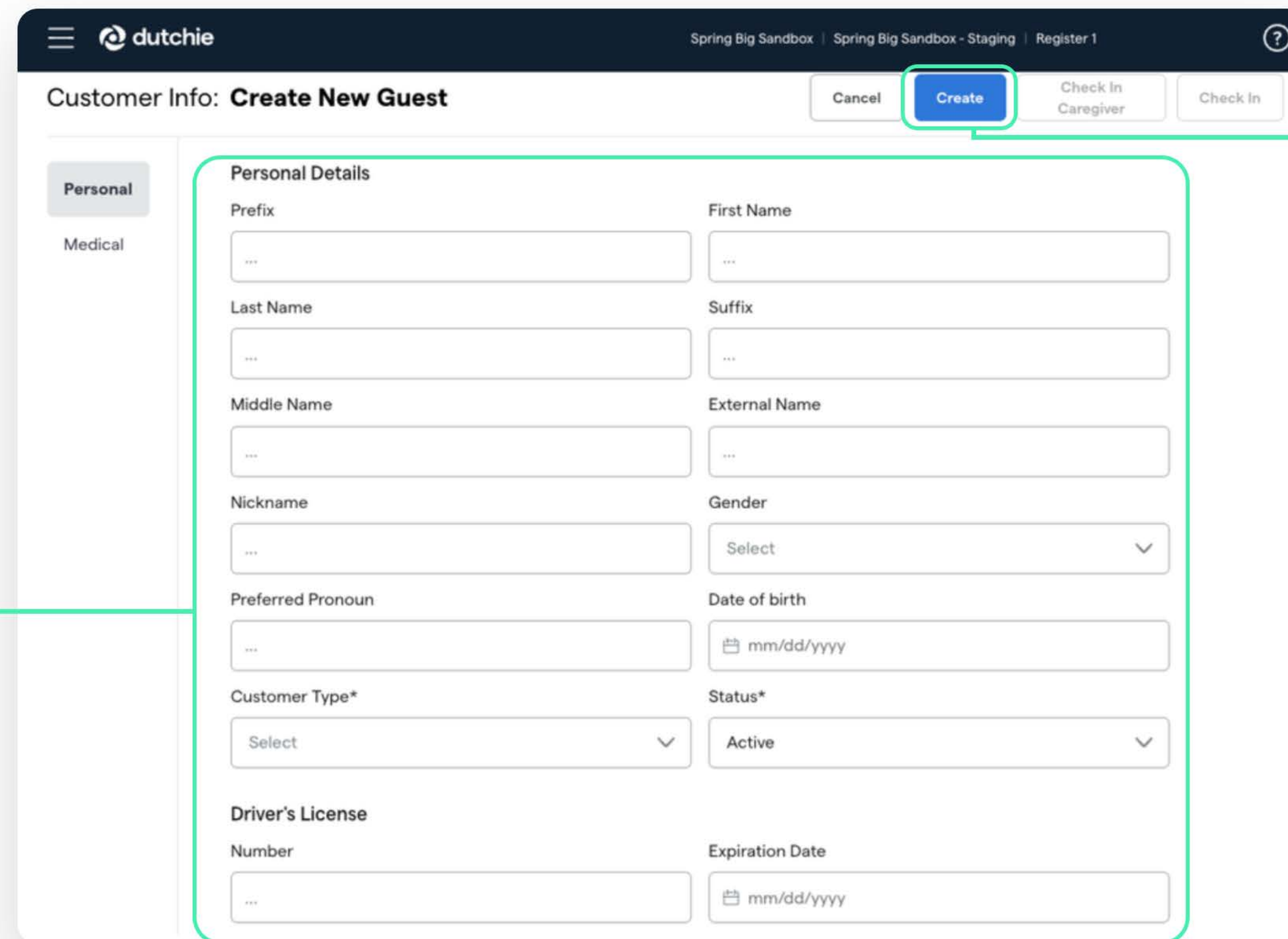


to start you can create a customer by selecting **customers** on the menu bar and then selecting **create new guest**



note: you must have the **opt-in workflow enable** to be able to sign customers up with **springbig**.

step 2

fill in the **customer's information**

step 3

select **create**

member data received:

- first name
- last name
- street
- city
- postal code
- birthday
- gender
- phone number
- email
- customer type

note: please do not edit points in the members profile since it will not be relayed over to springbig

step 4



select **create order**

Cancel

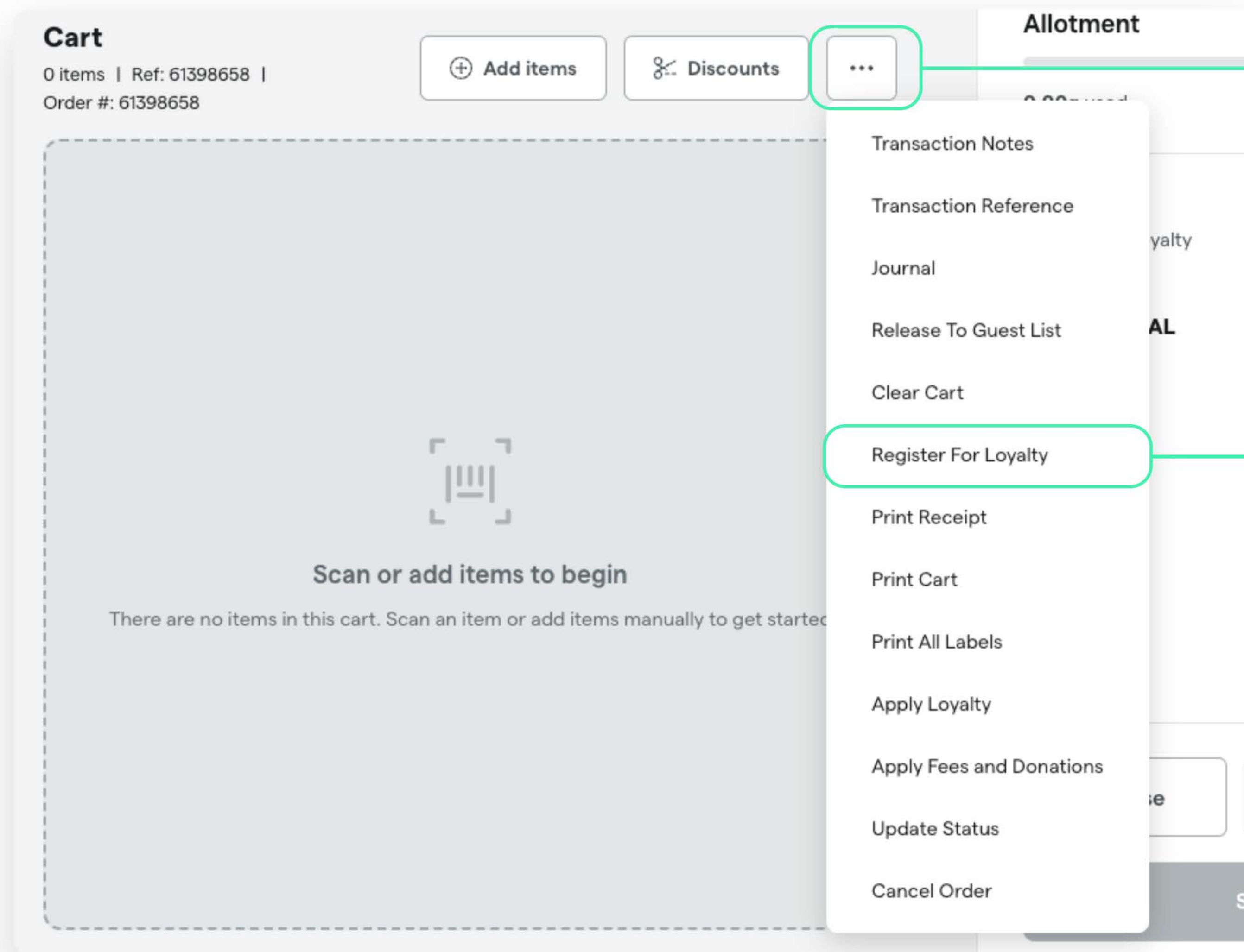
Save

Check In
Caregiver

Check In

Create Order

note: from here there are **two ways** that your members can be signed up with [springbig](#)



step 1



the first way

once you are in the **dutchie** POS, there will be an icon with **three dots**. once clicked, a drop down will appear, select the **register for loyalty**. once selected it will allow you to **register for loyalty**

step 2



the first way

confirm all the information is correct. to save, click on the bottom **sign up** button

note: once clicked, the member will be created in the **springbig** platform

×

Loyalty Registration

First Name

Last Name

John

Demo

Email Address

Cell Phone #

noreply@springbig.com

555-555-5555

Street Address

City

State

Postal Code

By clicking sign up, you are agreeing to share your information, including information from your state issued ID to receive marketing and loyalty messages from this facility. You may opt out at anytime of marketing messages via unsubscribe links in email and by replying STOP to text messages.

Sign Up

step 1



the second way

using the opt-in check box at checkout

once you are in the dutchie POS, click on select payment type

[Profile](#) [History](#)

Allotment

Legal limit: 0g

0.00g used

0.00g remaining [Details](#)

Subtotal	\$200.00
Discounts & loyalty	\$0.00
Tax	\$0.00
ORDER TOTAL	\$200.00

Release

Save

Notify

Select Payment Type

step 2



the second way

select the method of payment and check the box labeled **sign up customer for springbig**

<

Select payment type



Cash



Debit

REGISTER FOR LOYALTY

Signup Customer For:
SpringBig ☐

Order details

▼

ORDER TOTAL

\$200.00

Pay

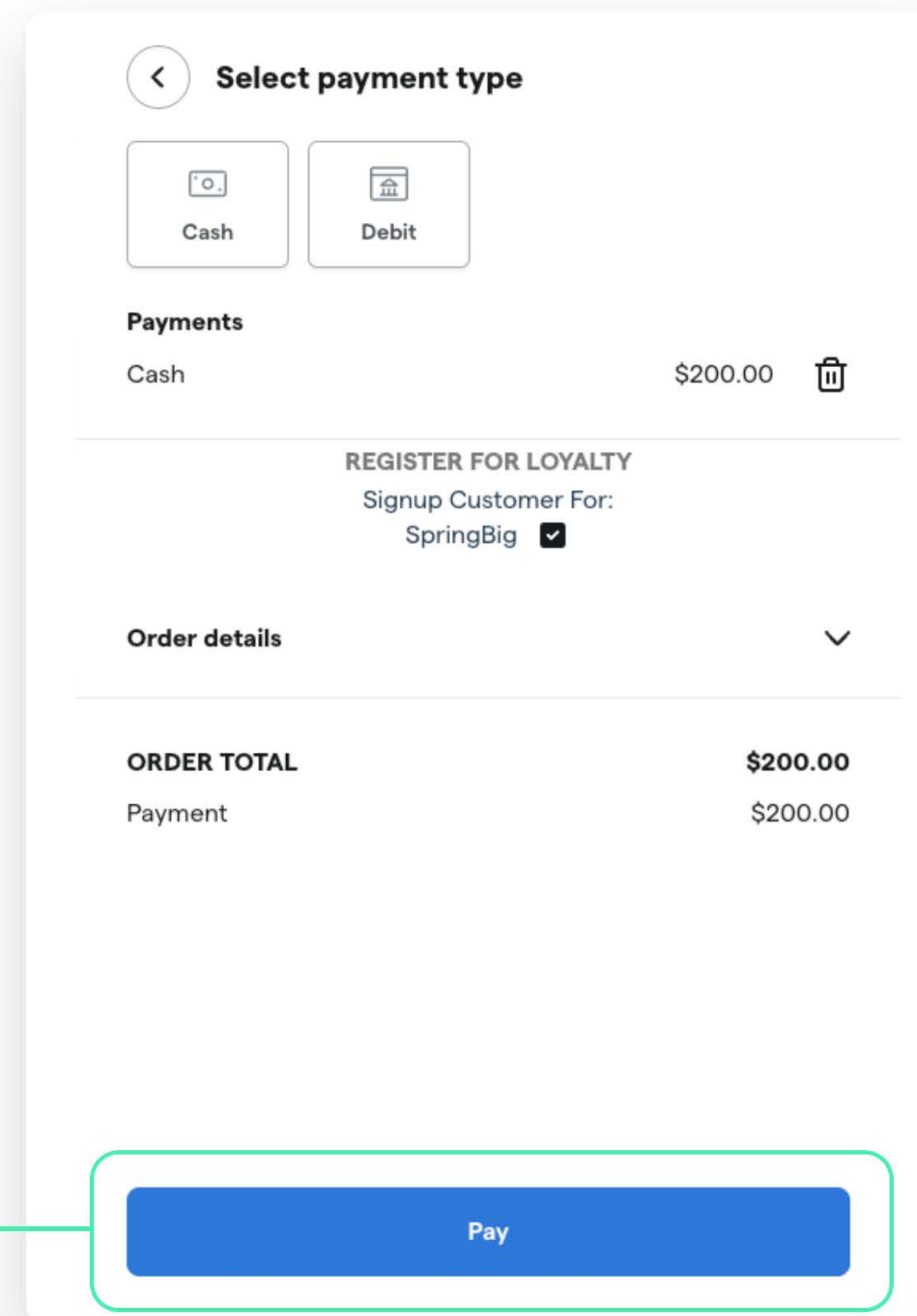
step 3



the second way

once you select **pay** on the bottom of the page,
the member will be created in **springbig**

note: **dutchie** will do a lookup by phone
number to see if there is an existing member
with the same phone number. if the member
exists in **springbig**, then neither **tag icon** or
opt-in check box will appear



< Select payment type

Cash Debit

Payments

Cash \$200.00 

REGISTER FOR LOYALTY

Signup Customer For:
SpringBig ☒

Order details 

ORDER TOTAL \$200.00

Payment \$200.00

Pay

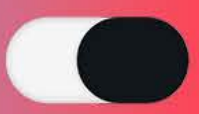
redemptions

step 1

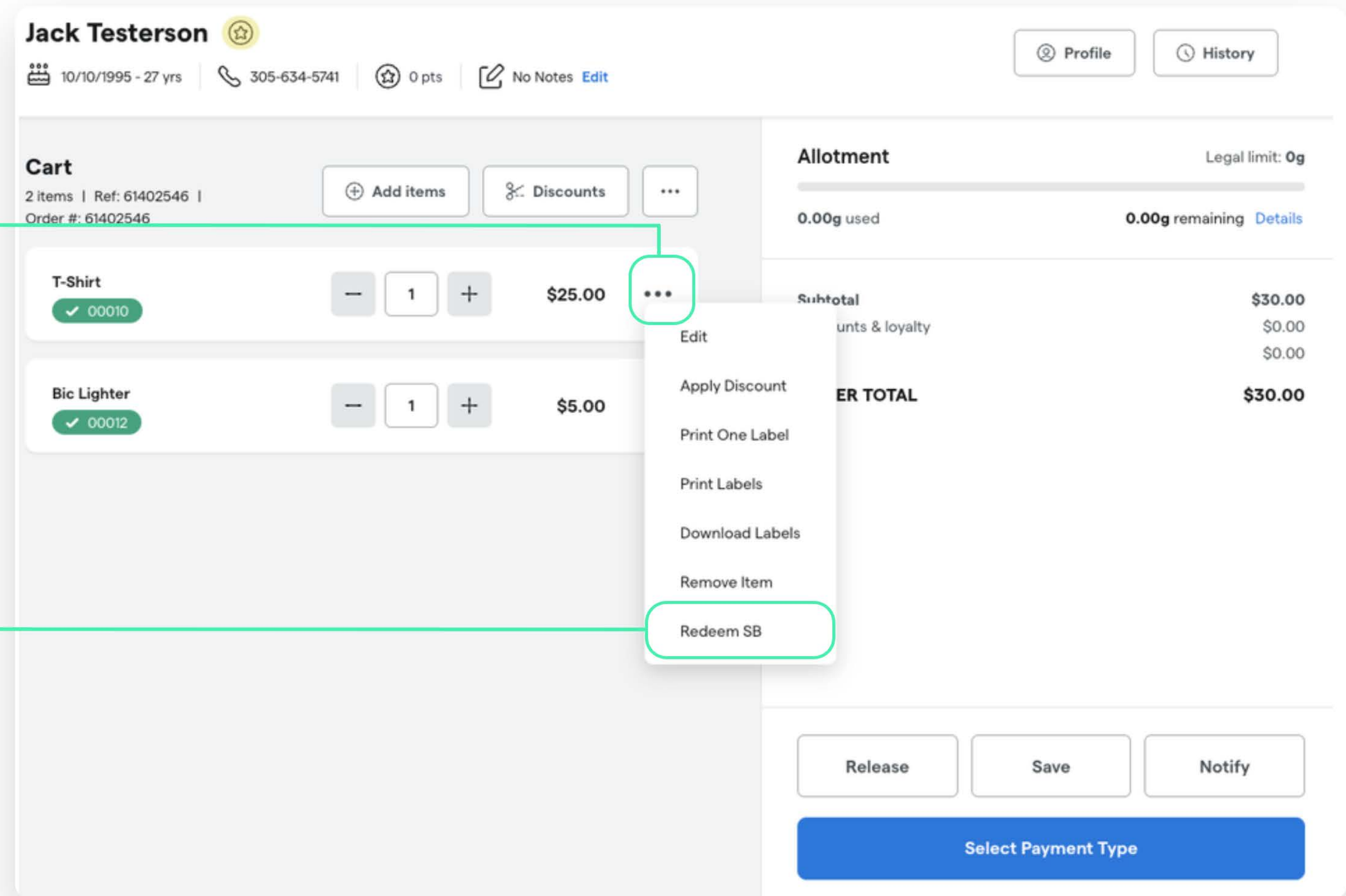


apply items to your members cart and toggle one of the **three dot icons** to the right of the item in the cart

step 2



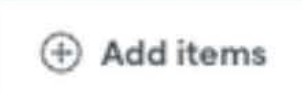
select **redeem sb**



Jack Testerson 

 10/10/1995 - 27 yrs |  305-634-5741 |  0 pts |  No Notes [Edit](#)

Cart
2 items | Ref: 61402546 | Order #: 61402546

Item	Quantity	Price	Options
T-Shirt  00010	- 1 +	\$25.00	
Bic Lighter  00012	- 1 +	\$5.00	

Allotment Legal limit: 0g
0.00g used 0.00g remaining [Details](#)

Item	Amount
Subtotal	\$30.00
Taxes & loyalty	\$0.00
GRAND TOTAL	\$30.00

[Edit](#)
[Apply Discount](#)
[Print One Label](#)
[Print Labels](#)
[Download Labels](#)
[Remove Item](#)
[Redeem SB](#)

[Release](#) [Save](#) [Notify](#)

[Select Payment Type](#)

step 3



on this page, you will see all **available offers** and **rewards** that can be redeemed as well as the member's total **available point balance**. select a reward to be redeemed

note: the redemption will not process until the transaction has been completed

Balance Info

Available Points: 500
Points Redeemed: 40
Points Remaining: 460

Offers



67 % off
Expires: 10/10/2023
Max Redemptions: 3
Redemptions Remaining: 3

Add

Redeemed Rewards and Offers

\$15 off test - 20 points

\$15 off test - 20 points

Rewards

Point value:10



\$15 off test
Point Value:20

Add



20% off
Point Value:20

Add

ready to get started?

springbig  +  **dutchie**