

springbig 



HELIX

BIOTRACK

integration guide

biotrack integration: improving segmentation

the **springbig** integration with **biotrack** now includes features for improving segmentation based on additional customer data

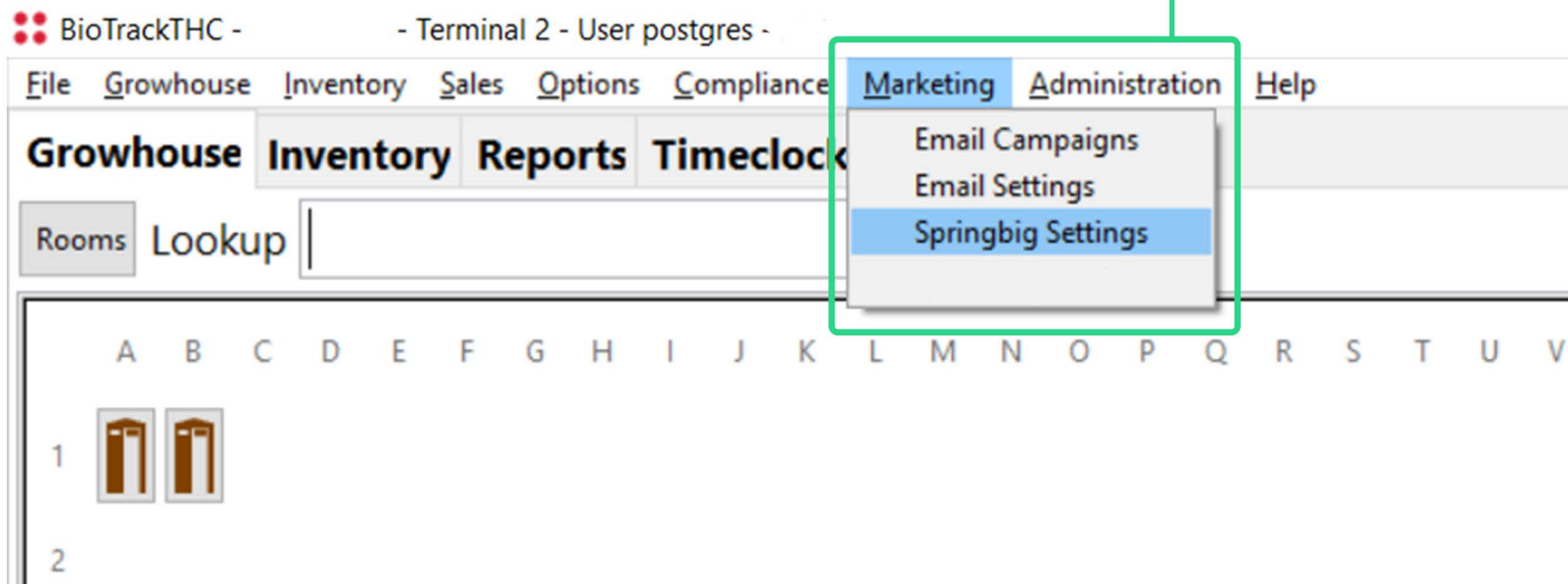
existing springbig retailers already using biotrack will need to upgrade the biotrack software. contact your springbig and biotrack **account managers** to schedule your upgrade

if you are new to using biotrack, you will need to contact your **springbig account manager** to retrieve the necessary '**auth token**' that enables the connection

biotrack integration: getting started

to get started, you must be on **biotrack version 559** or above to access the integration, and all terminal must also be running on **64 bit**. if you are already eligible for the integration, you will need to include the **springbig 'auth token'** into their **biotrack** settings to enable the connection

when you are ready, navigate to the top menu of the **biotrack** dashboard and select the **'marketing'** dropdown menu, then select **'springbig settings'**



biotrack integration: auth token and enable

step 2

enter you 'auth token' into the provided field

step 3

Check the 'enable springbig' option

version 559

- **version 559:** on this screen all locations tied to this account will integrate with springbig

step 4

Select 'offers and rewards' to integrate springbig loyalty (rewards and offers)

step 5

Click 'test settings' to ensure your connection was successful

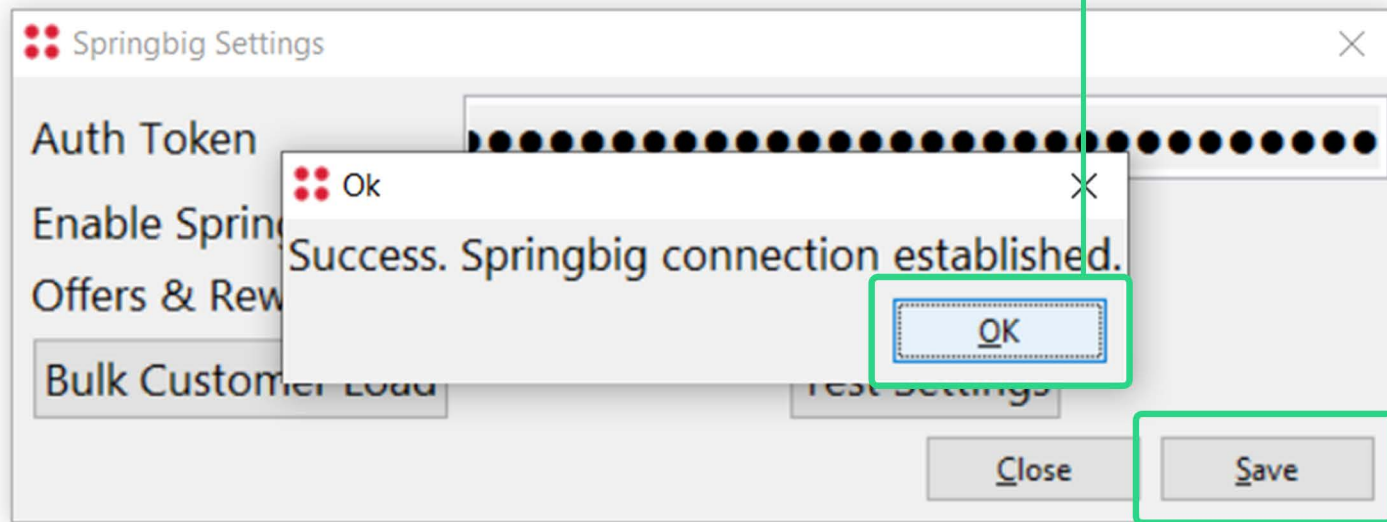
version 575 of higher

- Biotrack **version 575 or higher** allows for merchants to integrate individual locations with springbig. The merchant must be logged into the location to enable the integration
- The location will be specified on the settings page. You must **log in to each location** to enter the valid token

biotrack integration: test and save settings

step 6

once you get the '**success**' message, click the '**OK**' button

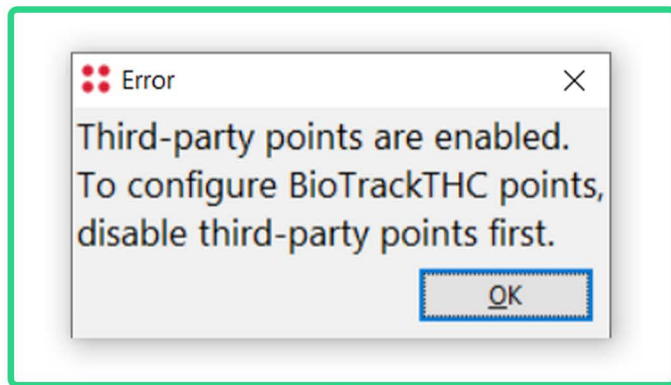


step 7

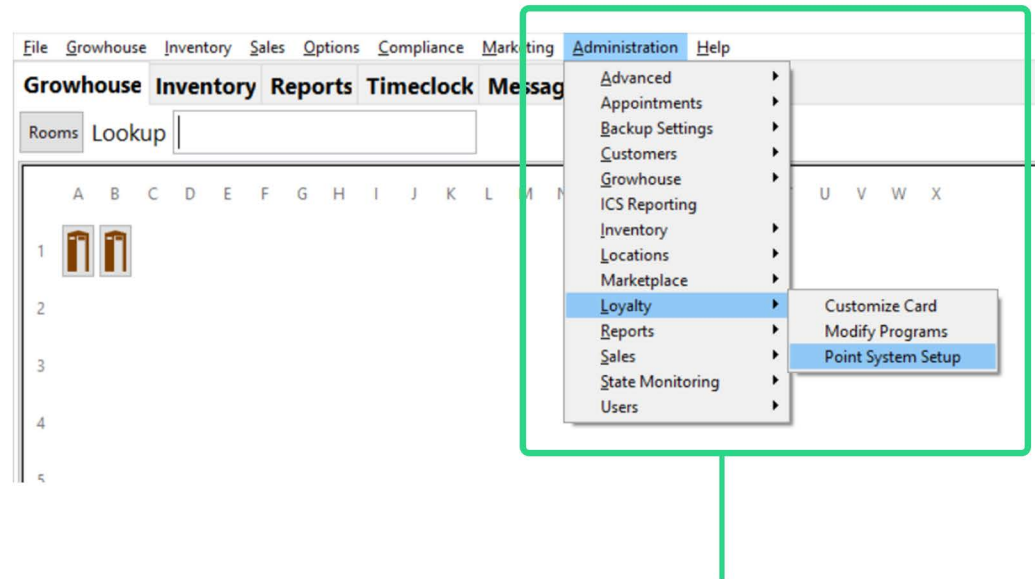
finally, select the '**save**' button to save the settings

biotrack integration: changing loyalty settings

note: you cannot run **biotrack loyalty** in parallel with **springbig loyalty**. once offers & rewards is enabled through these settings the biotrack loyalty will be disabled



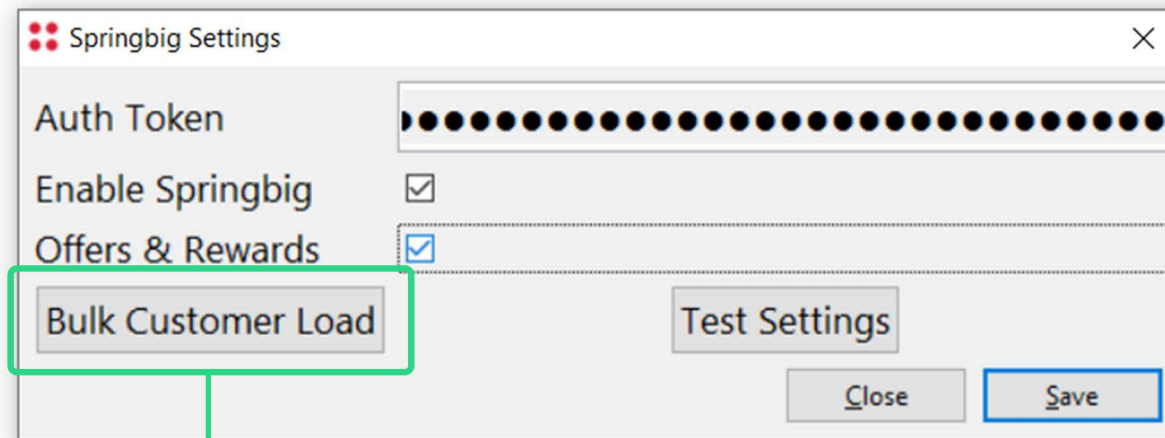
biotrack will remind the merchant if they attempt to enable loyalty within biotrack while springbig offers and rewards are enabled



if you wish to re-enable **biotrack loyalty**, you will need to disable the offers & rewards checkbox and reconfigure biotrack loyalty by navigating to the **administration** dropdown menu, select '**loyalty**' and click on the '**point system setup**' option

biotrack integration: bulk customer upload

biotrack also allows the merchant to synchronize current biotrack customers and import the customers over to springbig

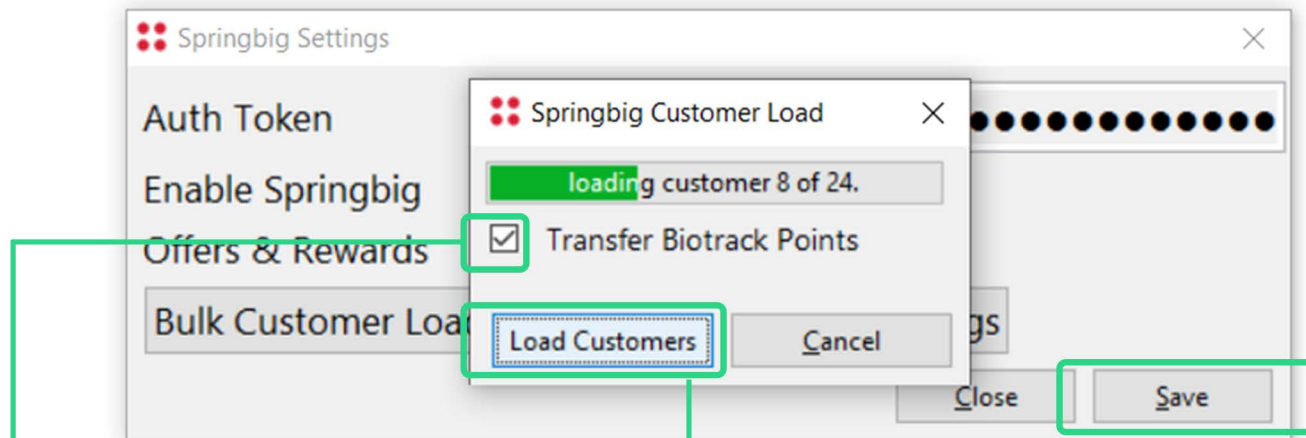


step 1

at the springbig settings window, select **'bulk customer load'** to enable this feature

biotrack integration: bulk customer load

when you activate a bulk customer load, a confirmation pop-up will ask if you also want to transfer **biotrack points** over to **springbig**. this is totally optional. on average, each customer should take around 1-3 seconds to send to springbig on a good internet connection. please plan accordingly for time if you have a large number of customers to bulk load



note:

if **'transfer biotrack points'** is selected, customer records from biotrack will be shared with springbig and if the customer has a current springbig balance, the existing biotrack balance will be added to the existing springbig points balance.

step 2

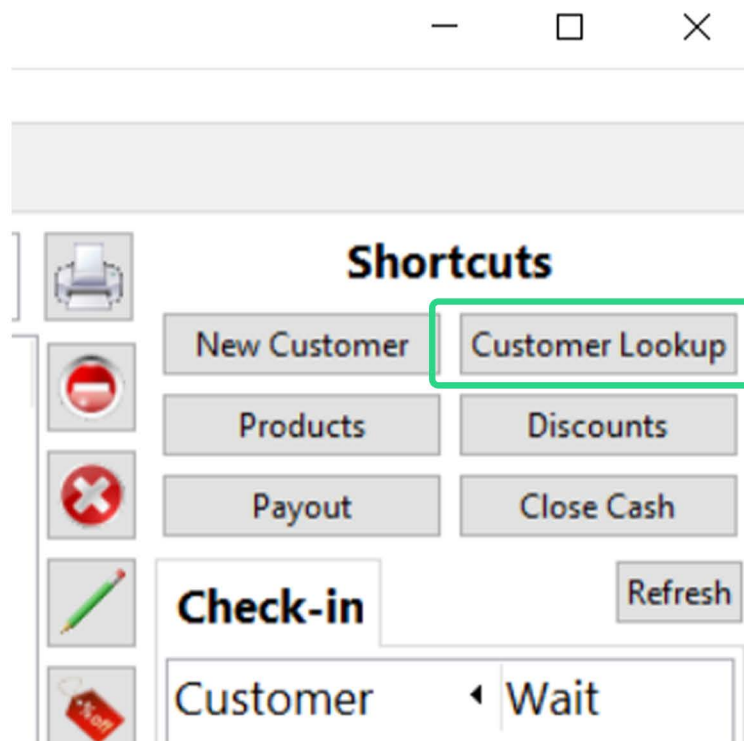
after clicking **'load customers'** button, biotrack will display a progress bar of the customers being uploaded - when this is complete just exit the screen

step 3

finally, select the **'save'** button to save the settings

biotrack integration: customer lookup

through this integration with biotrack, the springbig platform will be able to help you leverage essential data points through our loyalty and text marketing features



you can update a customer's profile in biotrack by selecting the '**customer lookup**' button under '**shortcuts**'

biotrack integration: member transfer data

springbig will receive the following attributes based on the **biotrack** member profile:

Customers

☐ New Customer

Search

Basic Info **More Info** **Marketing**

Last	Clinton	First	Bill
Middle	W	Phone	
Birthday	12 / 01 / 1946	Email	bill.clinton@biotrack
Cell	5555555555	Carrier	
MMJ Card		Exp	/ /
DL #		Exp	/
Referral		Member	Non-Member
Discount		Since	25 / 10 / 2018

History **Notes** **Conditions** **Caregiver**

Item	Quantity
15/06/2020	
Blue Dream 3.5	5.00 α

basic info

-  last name
-  first name
-  birthday
-  email
-  cell
-  member type (med/rec)

note: the space for 'MMJ Card' determines who is med. if no value is entered here, the customer will be classified as rec

biotrack integration: more info

springbig will receive the following attributes based on the **biotrack** member profile:

Customers

☐ New Customer

Search

Basic Info **More Info** **Marketing**

Address	555 Main	Apt/Suite	
City	Jacksonville	State	FL
		Zip	32210
Sex	☒ Male ☐ Female		

Plants

Location

Limit

Care Giver

Doctor

☐ Tax Exempt
☐ Is a Vendor
☐ Is a Care Giver

History **Notes** **Conditions** **Caregiver**

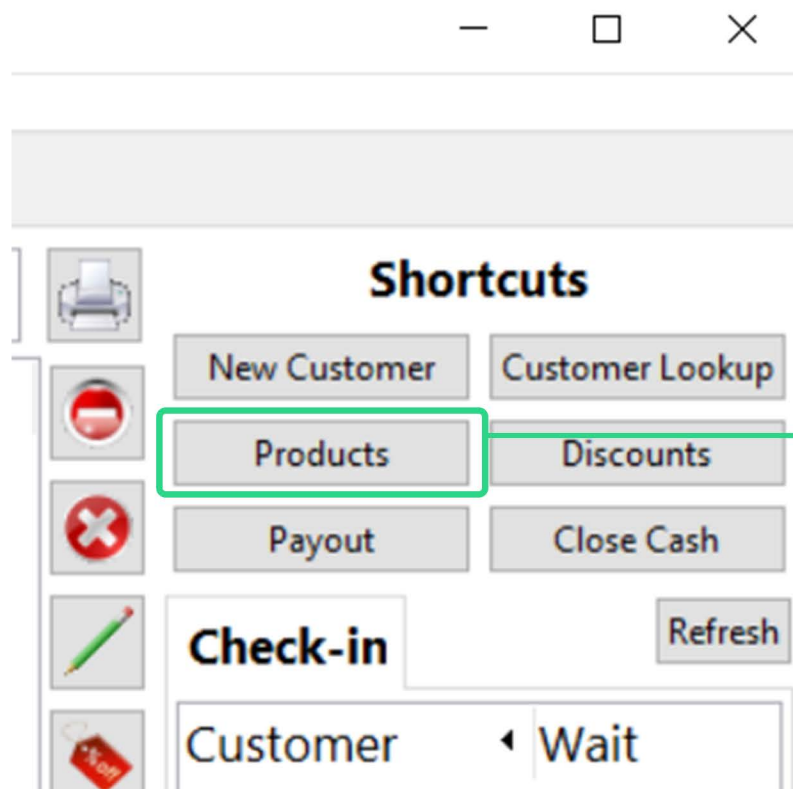
Item	Quantity
15/06/2020	
Blue Dream 3.5	5.00 g

from more info:

-  address
-  city
-  zip code
-  gender

biotrack integration: product data transfer

through this integration the springbig platform will also be able to help you leverage essential data points on your products collected by biotrack



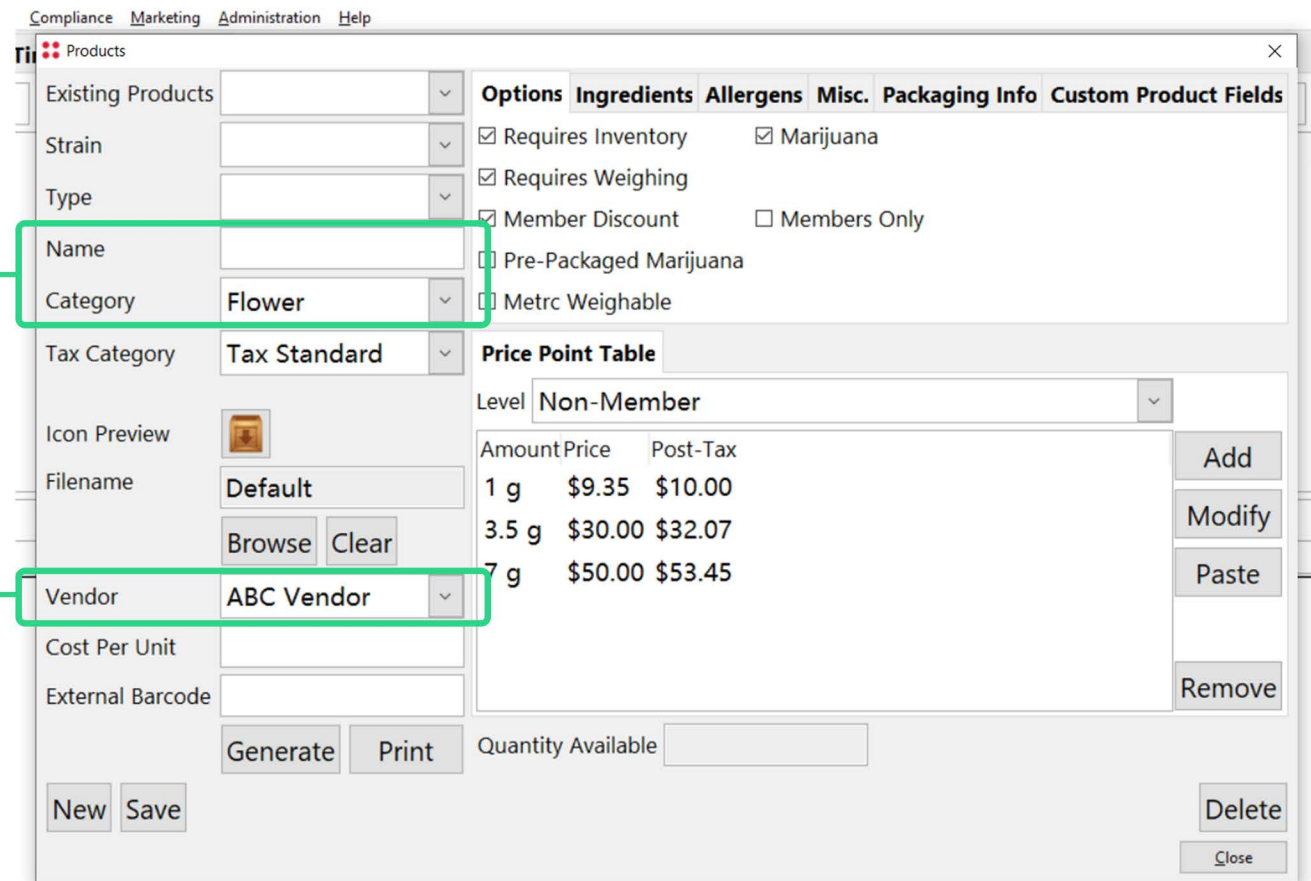
to view product details, select the **'products'** button under the shortcuts menu

biotrack integration: product details

springbig will receive the following attributes based on the biotrack product details

product info

-  name
-  category
-  vendor



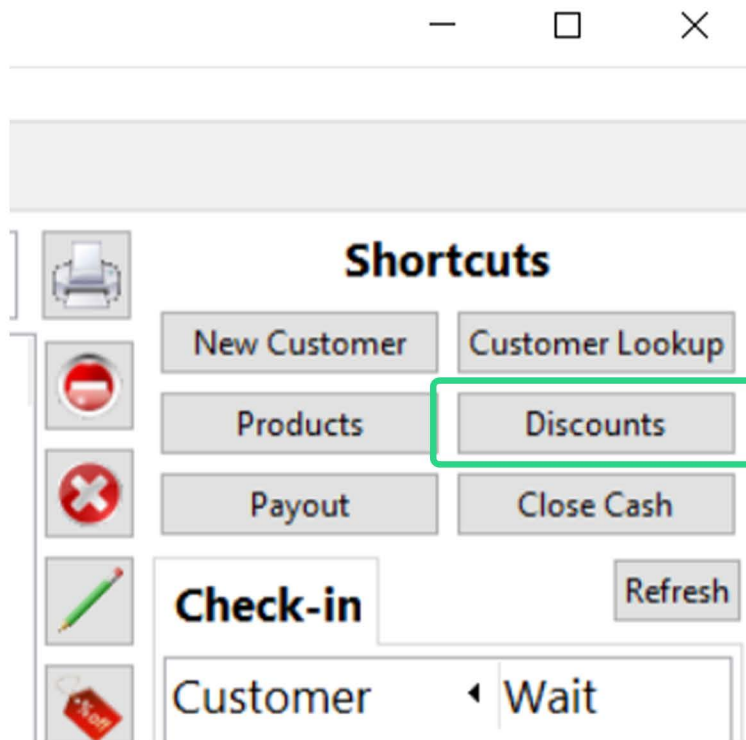
The screenshot shows the 'Products' form in Biotrack. A green box highlights the 'Name', 'Category', and 'Vendor' fields. A green line connects the 'product info' section to these fields. The 'Category' is set to 'Flower' and the 'Vendor' is set to 'ABC Vendor'. The 'Price Point Table' is also visible.

Level	Amount	Price	Post-Tax
Non-Member	1 g	\$9.35	\$10.00
	3.5 g	\$30.00	\$32.07
	7 g	\$50.00	\$53.45

note: springbig uses '**vendor**' as the brand value. if you are using a different field illustrating the product's brand, you will need to contact your **biotrack account manager** to enable sharing that value

biotrack integration: discount programs

you will need to configure **discounts** within biotrack that correlate with your springbig **rewards or offers**



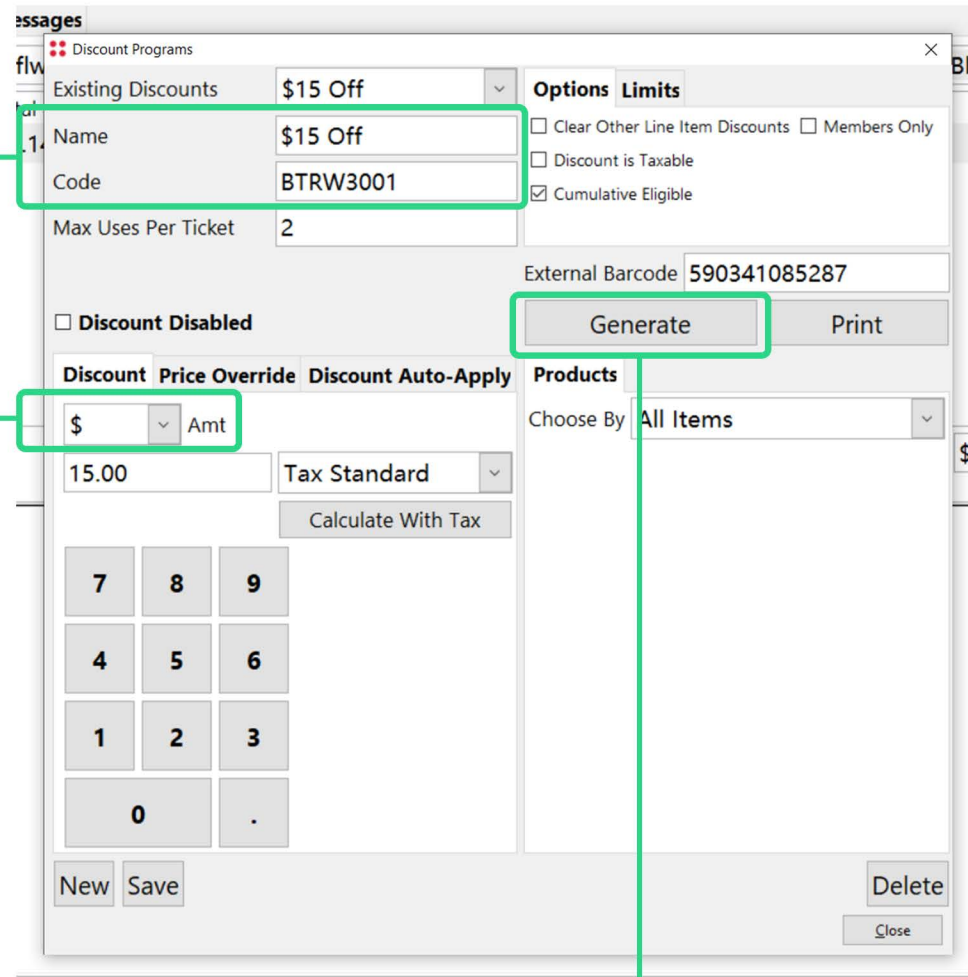
select '**discounts**' under the '**shortcuts**' menu

biotrack integration: discount details

the following discount details are essential for the springbig integration when creating a new discount in biotrack (or editing an existing discount)

define the discount, including:

-  name
-  type
-  code



The screenshot shows the 'Discount Programs' window in Biotrack. A green box highlights the 'Name' field containing '\$15 Off' and the 'Code' field containing 'BTRW3001'. A green line connects the 'type' label to the 'Discount' dropdown menu, which is currently set to '\$ Amt'. Another green line connects the 'code' label to the 'Generate' button. The 'Generate' button is also highlighted with a green box. The 'External Barcode' field shows '590341085287'. The 'Options' tab is selected, showing checkboxes for 'Clear Other Line Item Discounts', 'Members Only', 'Discount is Taxable', and 'Cumulative Eligible' (checked). The 'Limits' tab is also visible. The 'Discount Disabled' checkbox is unchecked. The 'Price Override' section shows '15.00' and 'Tax Standard'. The 'Products' section has a 'Choose By' dropdown set to 'All Items'. The 'New', 'Save', and 'Delete' buttons are at the bottom.

note: 'code' is an open field and allows you to assign any unique value. keep in mind, this code will become important when setting up springbig rewards or offers

an external barcode must be generated for each discount, select '**generate**' to continue

biotrack integration: define reward or offer

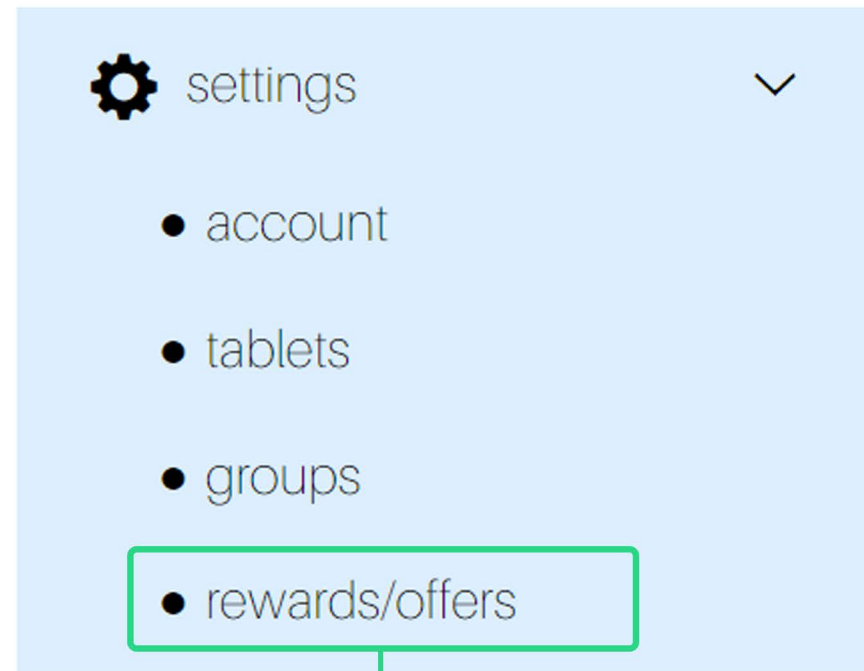
springbig supports the following:

- 🌿 sale discounts
- 🌿 product discounts
- 🌿 cash for points

note: for 'cash for points' you will need to contact your **springbig account manager** to enable this reward setting. keep in mind, springbig only allows for one (1) cash for points reward type

step 1

to configure **springbig rewards or offers** to associate with a **biotrack discount**, access the '**settings**' dropdown menu from the springbig dashboard and select '**rewards/offer**'



biotrack integration: reward or offer details

next, you will need to include the **biotrack discount code (see page 14)** into the springbig reward

rewards/offers

reward name
reward value
POS string (optional)
POS reward value (optional)

▼

[add display image](#)
[add coupon image](#)

new

rewards	reward	value	redeemed	preload	coupon	active	
	{ free half joint }	5	100	true	true	active	edit
	{ free half gram }	5	16	true	true	active	edit

step 2

you can create a **new reward or offer** at the top of the page, or select '**edit**' on an existing reward or offer and change it to match with existing biotrack discounts

step 3

make sure the information in the reward settings corresponds with the information set up in your biotrack discount

the following fields are required:

- 🌿 reward name
- 🌿 reward value
- 🌿 rewards POS string
(biotrack discount code- see page 14)
- 🌿 POS reward value
(discount amount)

also make sure the reward is set to **'active'**

manage reward

reward name

\$15 off

reward value

150

reward POS string (optional)

BTRW3001

POS reward value (optional)

\$ ▾

15

Status

☒ active

update

coupon image



remove

display image



remove

biotrack integration: cash for points details

note: when creating a reward that gives '**cash for points**' it will require the following attributes to be entered:

 reward name

 reward value

note: for 'cash for points' you will need to format the reward name as a dollar sign (\$) followed by a cash for point conversion value (ex. \$.04)

again, make sure the reward is set to '**active**'

this completes the process of setting up a reward or offer

manage reward

reward name

\$.04

reward value

100

reward POS string (optional)

POS reward value (optional)

Status

☒ active

update

coupon image



remove

display image



remove

biotrack integration: point of sale experience

now, let us review the redemption process from the biotrack point of sale.
first, make sure there is a customer included in the transaction, and the products being purchased

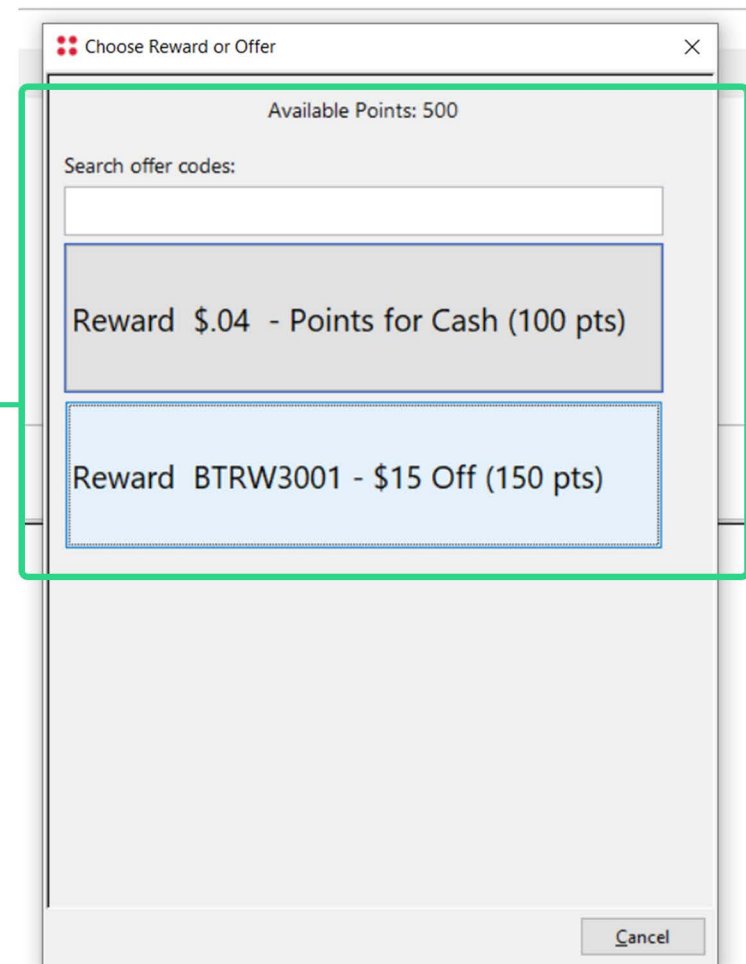
step 1

select this icon in order to choose an available reward or offer



the icon will open a new pop-up that displays the available:

- ① rewards and offers
- ① cash for points reward
- ① the customers current point balance

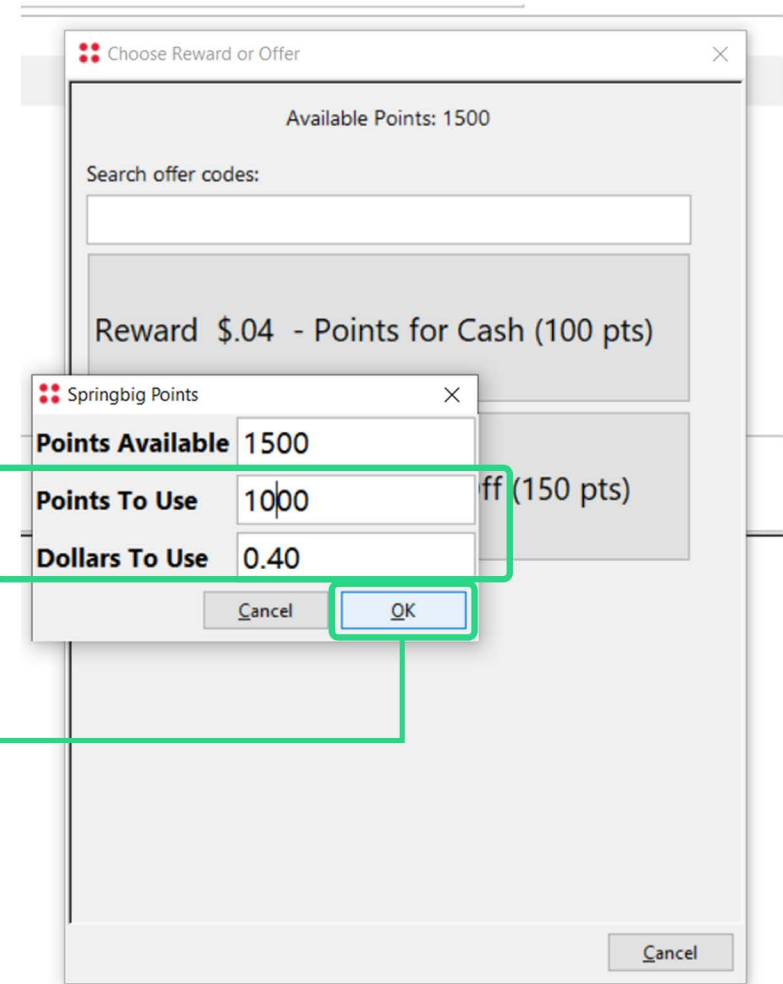


biotrack integration: redeeming points for cash

note:

if the **'points for cash'** type reward is chosen, the retail staff member can configure the **'points to use'** or the **'dollars to use'** towards the purchase similar to the current **biotrack 'points for cash'** functionality

once you have finished selecting the amount, just click **'ok'**



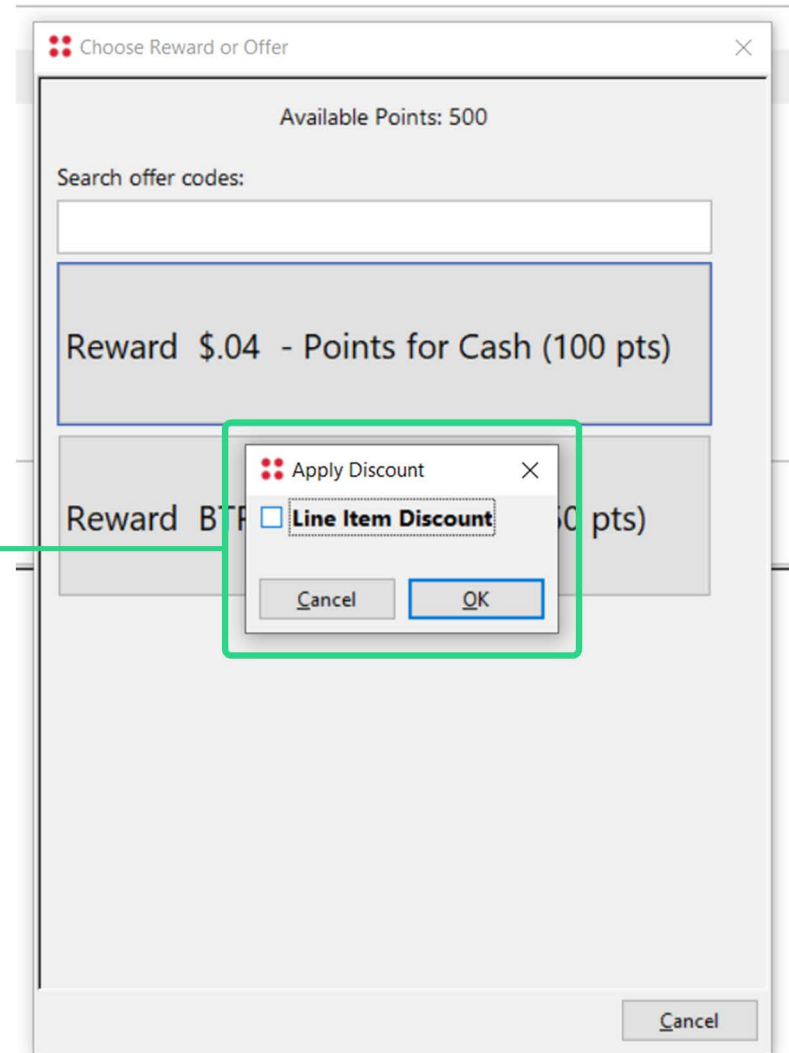
biotrack integration: apply to item or order

step 2

if you are **not** using the '**points for cash**' type reward, select the reward or offer you wish to apply from the list. then you must confirm if this discount should be applied to the line item

note:

if this is not selected, then the discount will apply to the entire purchase



biotrack integration: redeeming rewards

retail staff can select multiple rewards or offers as long as the customer has sufficient points

note:

'points for cash' redemptions will display as a line item labeled as 'springbig points'

discount rewards or offers will display the reward or offer name as the line item discount

The screenshot shows a retail POS system interface. At the top, there is a menu bar with options: File, Growhouse, Inventory, Sales, Options, Compliance, Marketing, Administration, and Help. Below this, there are tabs for Customers, Inventory, Reports, Timeclock, and Messages. The 'Customers' tab is active, showing a customer named Bill Clinton. To the right of the customer name is a 'Limit' button with a red prohibition sign and a status bar showing 'flwr:49.56g conc:34.96g s:'. Below the customer information is a table with columns: Item, Price, Quantity, Tax, and Total. The table contains three line items: 'Blue Dream 3.5' with a price of 60.00, quantity of 2, tax of 6.9%, and total of 63.72; 'Springbig Points (0.40)' with a price of 0.40, quantity of 1, tax of 0.00%, and total of 0.40; and '\$15 Off (15.00)' with a price of 15.00, quantity of 1, tax of 0.00%, and total of 15.00. At the bottom of the screen, there is a 'Subtotal' field showing \$44.60 and a 'Tax' field showing \$3.08.

Item	Price	Quantity	Tax	Total
Blue Dream 3.5	60.00	2	6.9%	63.72
Springbig Points (0.40)	0.40	1	0.00%	0.40
\$15 Off (15.00)	15.00	1	0.00%	15.00

Subtotal \$44.60 Tax \$3.08

biotrack integration: voids/refunding

when voiding or refunding sales that involve the customer redeeming points for cash rewards, springbig will **repopulate any points redeemed** in the sale and **subtract any points earned** from the sale, bringing the customer to their pre-transaction points total

example: customer A has **3,000 points before** a sale

- ④ customer A **spends 100 points** for \$10 cash toward the sale and **earns 50 points** from the sale
- ④ customer A would have **2,950 points after** the sale
- ④ if the sale is **voided**, customer A will have **3,000 points** again

when voiding or refunding sales that involve the customer redeeming **offers or standard rewards**, springbig will **NOT** repopulate the offers or the points redeemed on a standard reward. customers may be re-rewarded by **manually adding points** through the springbig portal. however, offers **cannot be undone**

biotrack integration: completing the purchase

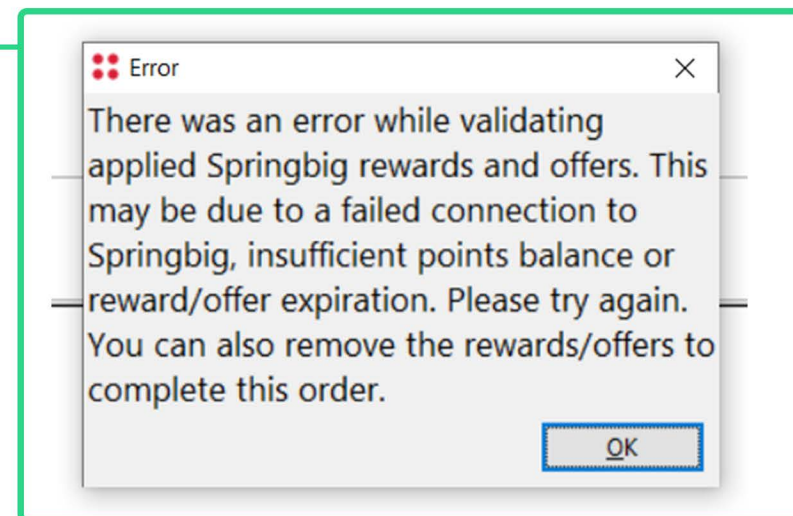
step 3

lastly, the reward or offer redemptions will occur when the sale has been paid and processed

note:

biotrack will display an error message if:

- ① the customer does not have sufficient points
- ① if the offer is no longer valid
- ① if the connection has been lost



this completes the process of redeeming rewards at the point of sale