



optileaf set up guide

first things first

we suggest you configure the integration
before opening or at the end of business day

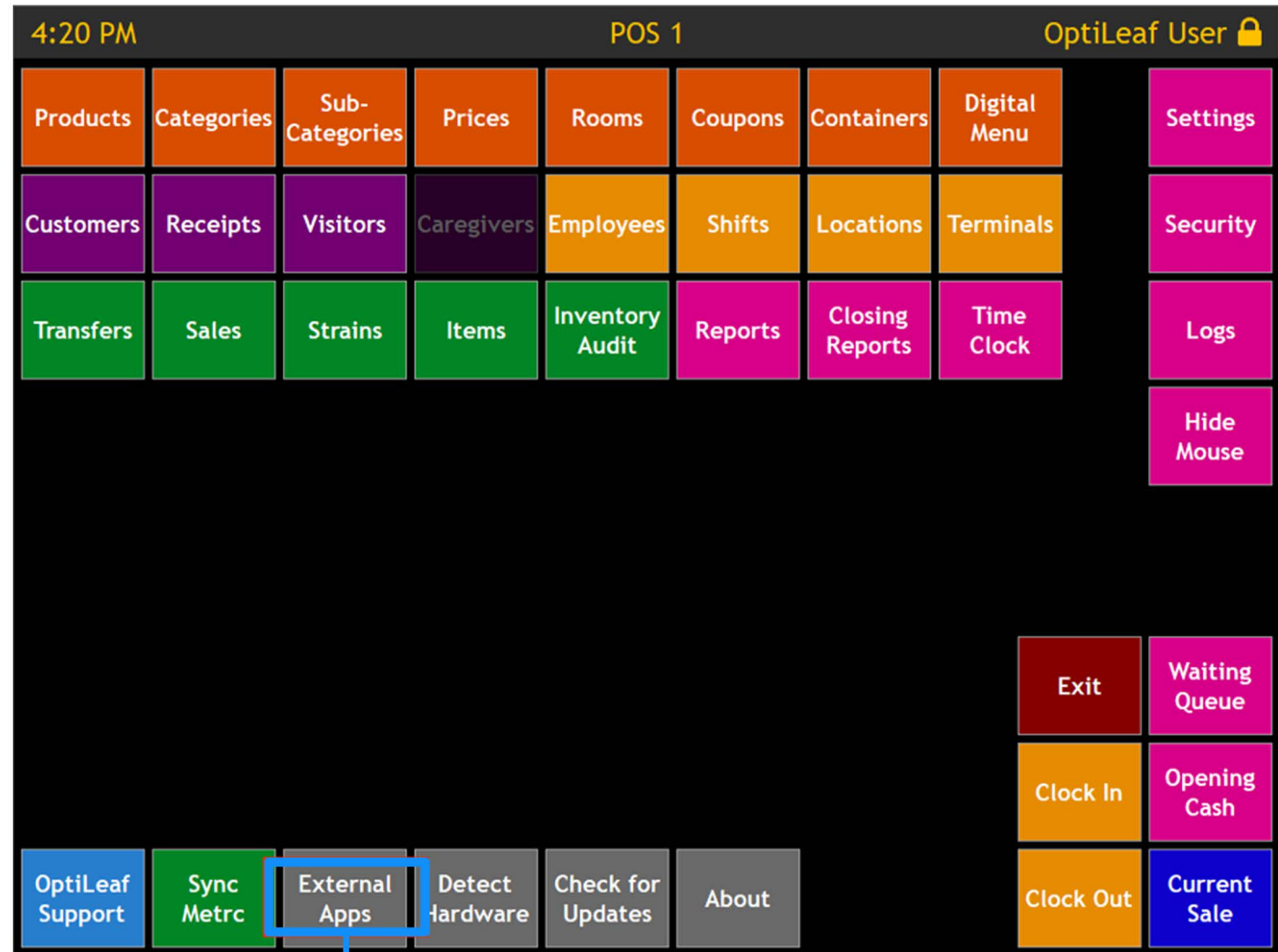
please be advised that springbig policy is
to schedule activations of production integrations
tuesday through thursday **only**

this is so that we can observe and support
the activated transaction flow

optileaf setup: getting started

step 1. sign in to your Optileaf POS dashboard

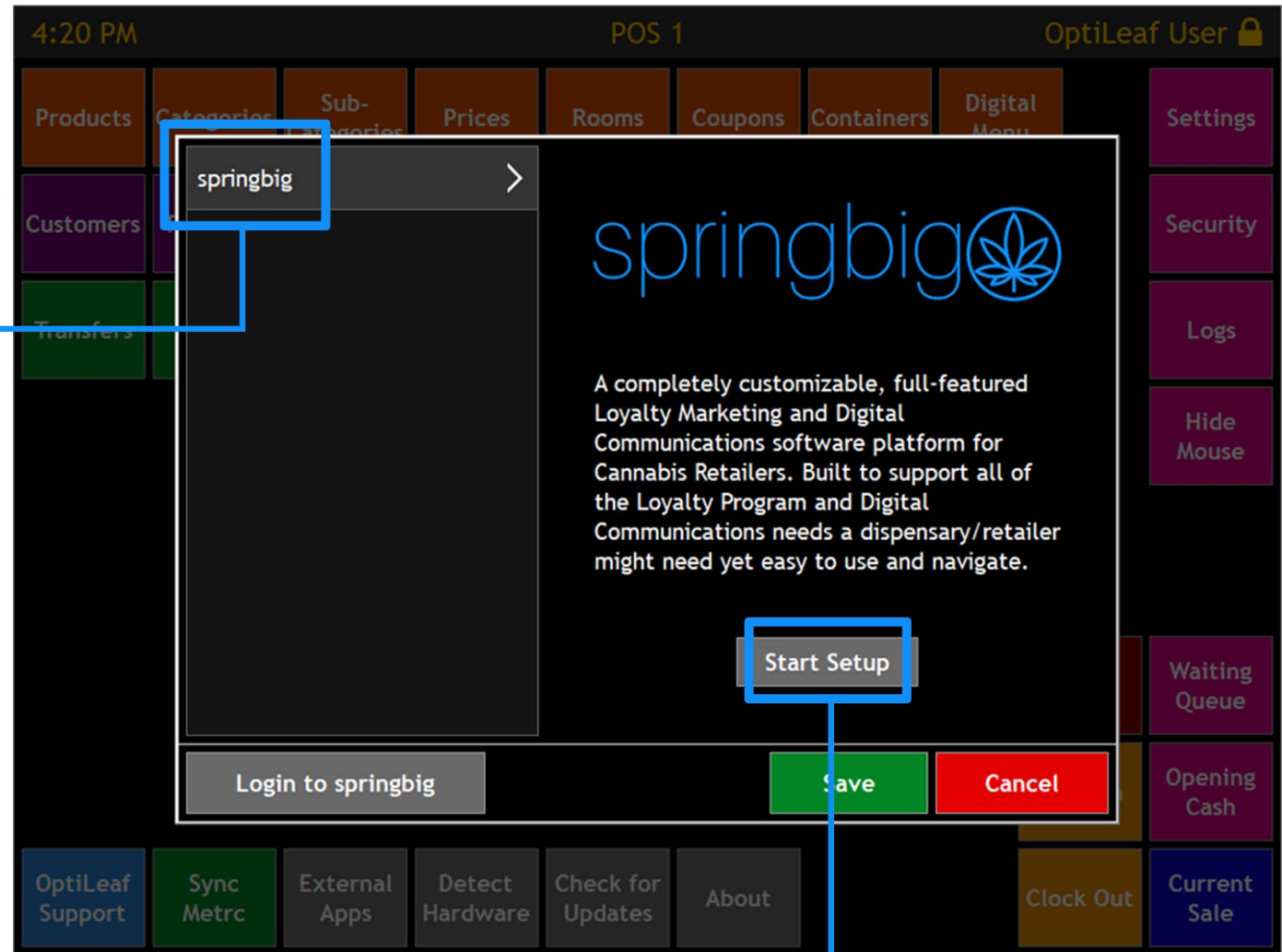
step 2. click the button that is labeled **'external apps'** from the POS screen



optileaf setup: choosing springbig

step 3.

select the **springbig** option



step 4.

click on the button labeled **'start setup'**

optileaf setup: allow access

the setup page will display the available sections that communicate with springbig, we **strongly recommend** selecting all for existing segmentation and future segmentation capabilities:

step 5. choose the sections you would like springbig to have access to, including:

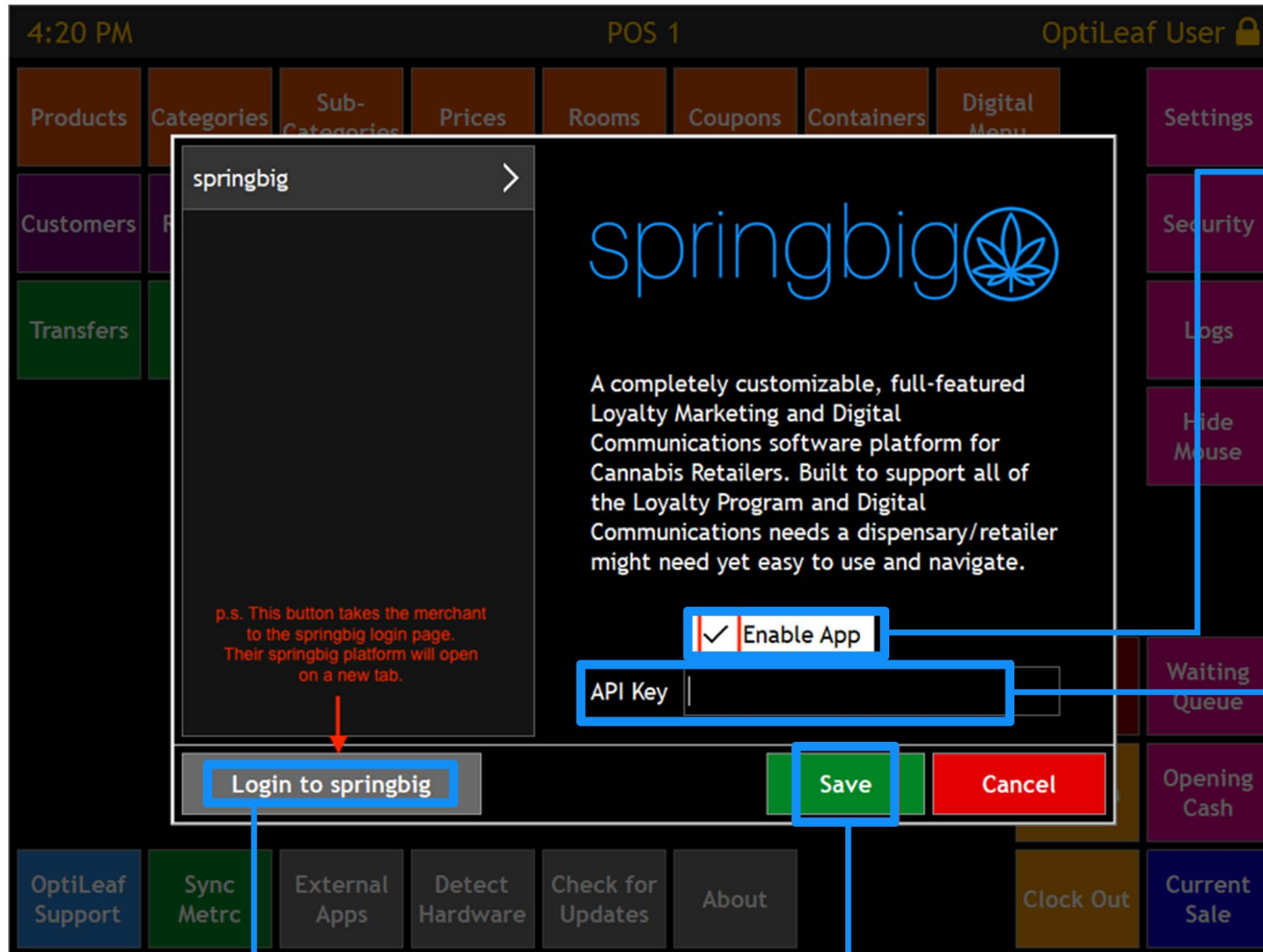
- 🌿 brands
- 🌿 categories
- 🌿 coupons
- 🌿 customers
- 🌿 prices
- 🌿 products
- 🌿 receipts

step 6.
click on the button
labeled 'allow'



optileaf setup: allow access

at this point, make sure you have opened the [password protected pdf document](#) sent to you by the springbig integrations team with your API information



step 7. make sure to check the option 'enable app'

step 8. Enter the AUTH-TOKEN that is shared by springbig in the API Key field

note: it only needs to be entered into one PC--afterwards the other PCs software should be restarted

step 9. click on the button labeled 'save'

note: this added feature is for convenience, but **not a required step** for the integration process

optileaf setup: historical transaction sync

with a historical transaction synchronization, the data on all your transactions from your optileaf will be brought over to your springbig account, which facilitates present and future segmentation and automation options

this is optional, but if you want to import historical transactions you can simply select a date range from this box then select **'upload'**

The image shows a screenshot of a software interface for uploading receipts. The main title of the dialog is "Upload Receipts to SpringBig". Below the title, there is a "Start Date" label followed by a date input field (displaying "__/__/__") and a calendar icon. At the bottom of the dialog are two buttons: a green "Upload" button and a red "Cancel" button. A blue line originates from the word "upload" in the text above and points directly to the green "Upload" button.

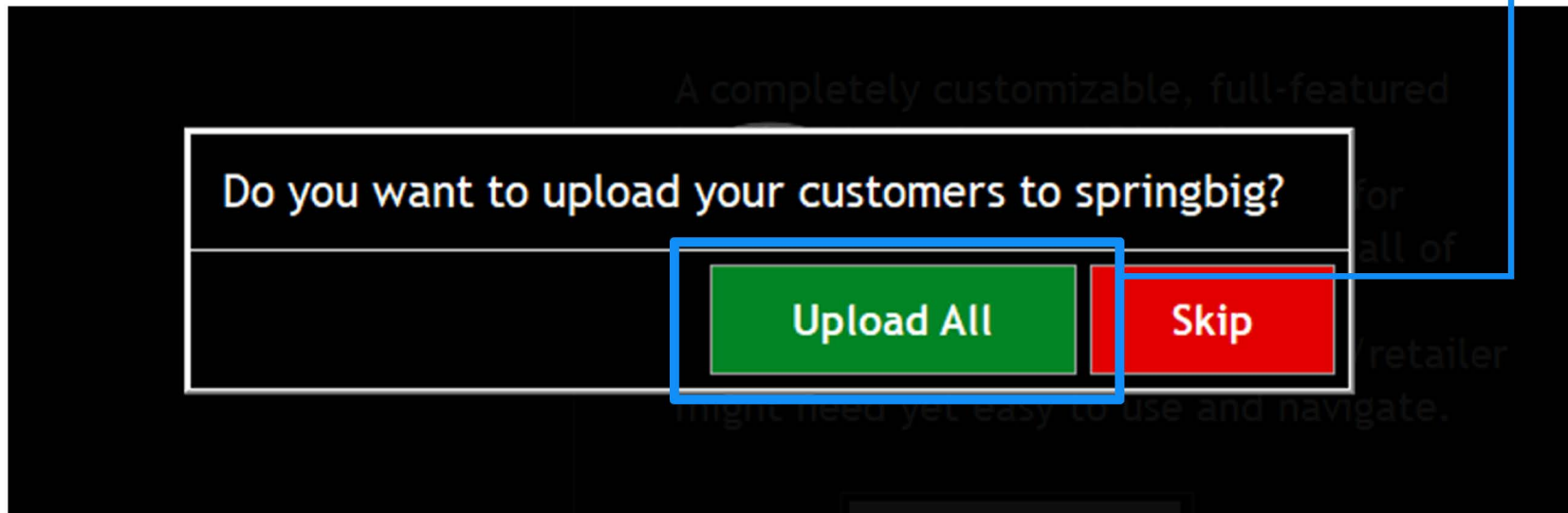
note: keep in mind this feature creates visits, while allocating points and trigger messaging

optileaf setup: member synchronization

after giving springbig access to your POS and enabling the app with the API Key, a new prompt will open. here you have the option to synchronize your entire member list from optileaf onto springbig with a click of a button

note: this feature is also optional, but we **strongly recommend** member synchronization

step 10: if you choose to sync, simply click the 'upload all' option



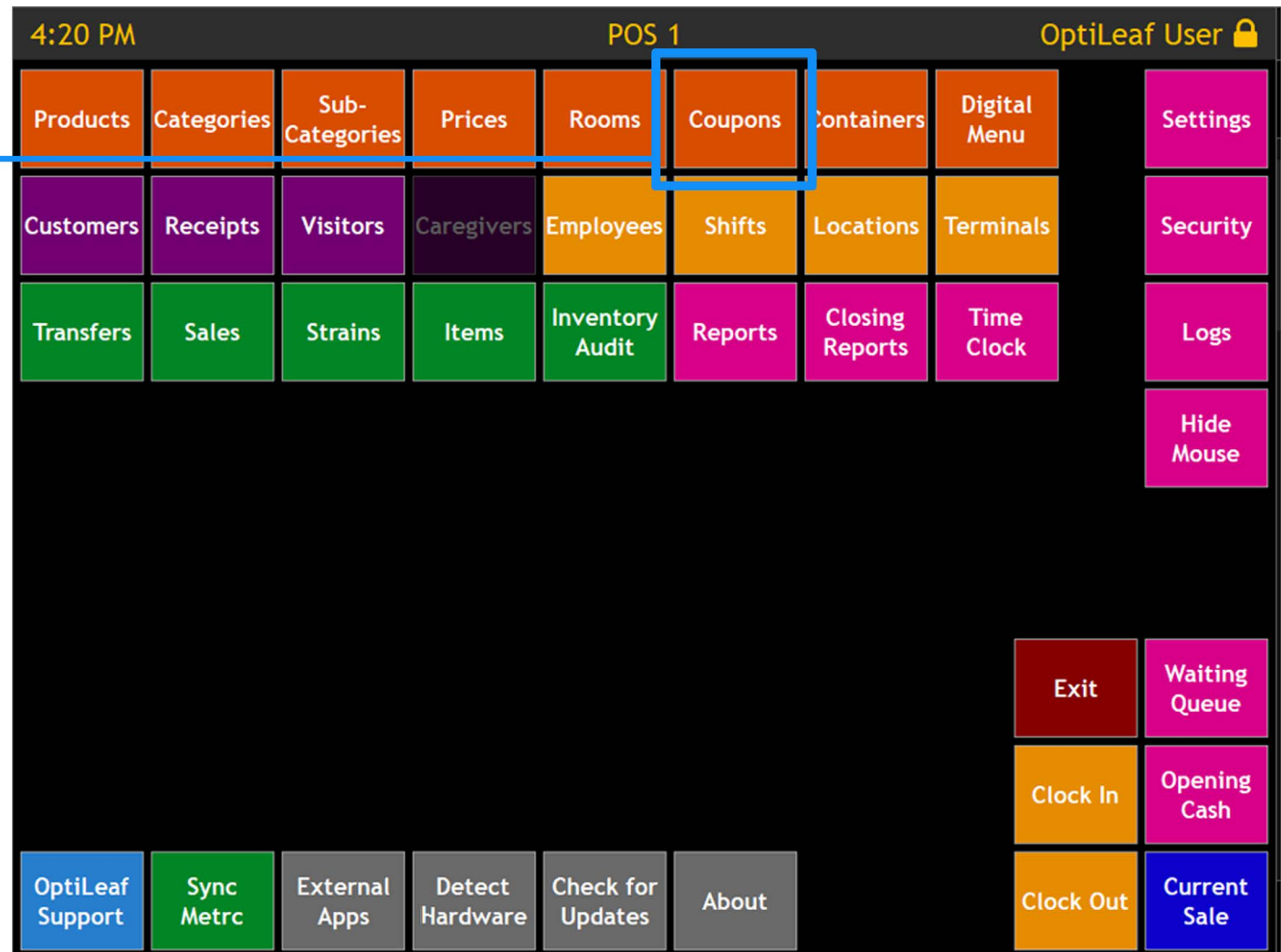
chapter 2

setting rewards & offers

optileaf setup: setting rewards & offers

once you've set up your integration with optileaf and springbig, you can start setting up your rewards and offers as '**coupons**' in your optileaf POS system

step 1. select the '**coupons**' option from the admin page of optileaf



optileaf setup: setting up rewards & offers

step 2. here you can start configuring the offer details. make sure to identify the **'method'** accordingly, along with any usage limits **example:** for a 50% Off offer, set the method to **'percentage off'** and for a specific dollar amount off choose **'dollar amount'**

step 3. set the **'redeem'** setting to the **'by code'**

step 4. create a code that will help each system identify this offer

note: you will need this number again for **step 9 on page 11**

step 5. set the offer status to **'active'**

step 6. click **'save'**

The screenshot shows the 'optileaf' setup interface for configuring rewards and offers. The interface is divided into two main tabs: 'Info' and 'Eligibility'. The 'Eligibility' tab is currently selected.

About Section:

- Description:** A text input field.
- Redeem:** A dropdown menu set to 'Auto-Apply when Eligible'.
- Code:** A text input field containing '4110'.
- Options:** A group of radio buttons. 'Coupon is Active' is selected. Other options include 'Requires Approval' and 'Can't Use with Other Offers'.

Usage Limits Section:

- Per Customer:** A dropdown menu set to 'No Limit'.
- Per Sale:** A dropdown menu set to 'No Limit'.

Weight Section:

- Quantity:** A text input field containing '0.00'.
- Units:** A dropdown menu set to 'Grams'.
- Allow Partial Weight:** A radio button option.

Discount Section:

- Method:** A dropdown menu set to 'No Discount'. Other options include 'Percentage Off', 'Dollar Amount Off', and 'Set to Exact Amount'.

Buttons:

- Print Coupon:** A purple button.
- Save:** A green button.
- Cancel:** A red button.

Blue lines connect the text steps to the corresponding UI elements: Step 2 points to the 'Discount Method' dropdown; Step 3 points to the 'Redeem' dropdown; Step 4 points to the 'Code' input field; Step 5 points to the 'Options' radio buttons; Step 6 points to the 'Save' button.

optileaf setup: setting up rewards & offers

in order for the integration associate the reward or offer on springbig with the coupon on optileaf, you want to make sure to configure the discount accordingly

step 7.

from the springbig dashboard, click on 'rewards/offers' from the 'settings' drop down menu

rewards/offers

reward name: \$25 off reward value: 100 POS string (optional): 4110

add display image add coupon image

new

reward	value	redeemed	preload	coupon	active
T Farms 1/8th (\$1)	300	1	true	true	active
5E Extracts Cartridge (\$1)	300	0	true	true	active
Master Shred Grinder (\$1)	300	0	true	true	active
Liberty Luau Extract 1 Gram (\$1)	600	0	true	true	active
Ed's Edibles 3 Combo (\$1)	600	1	true	true	active

step 8.

next, fill in the rewards information in springbig to match the configuration you set up in optileaf

step 9.

enter the 'code value' you created in the optileaf 'coupon' section into the 'POS string' option of the new reward (see step 4 page 10)

chapter 3

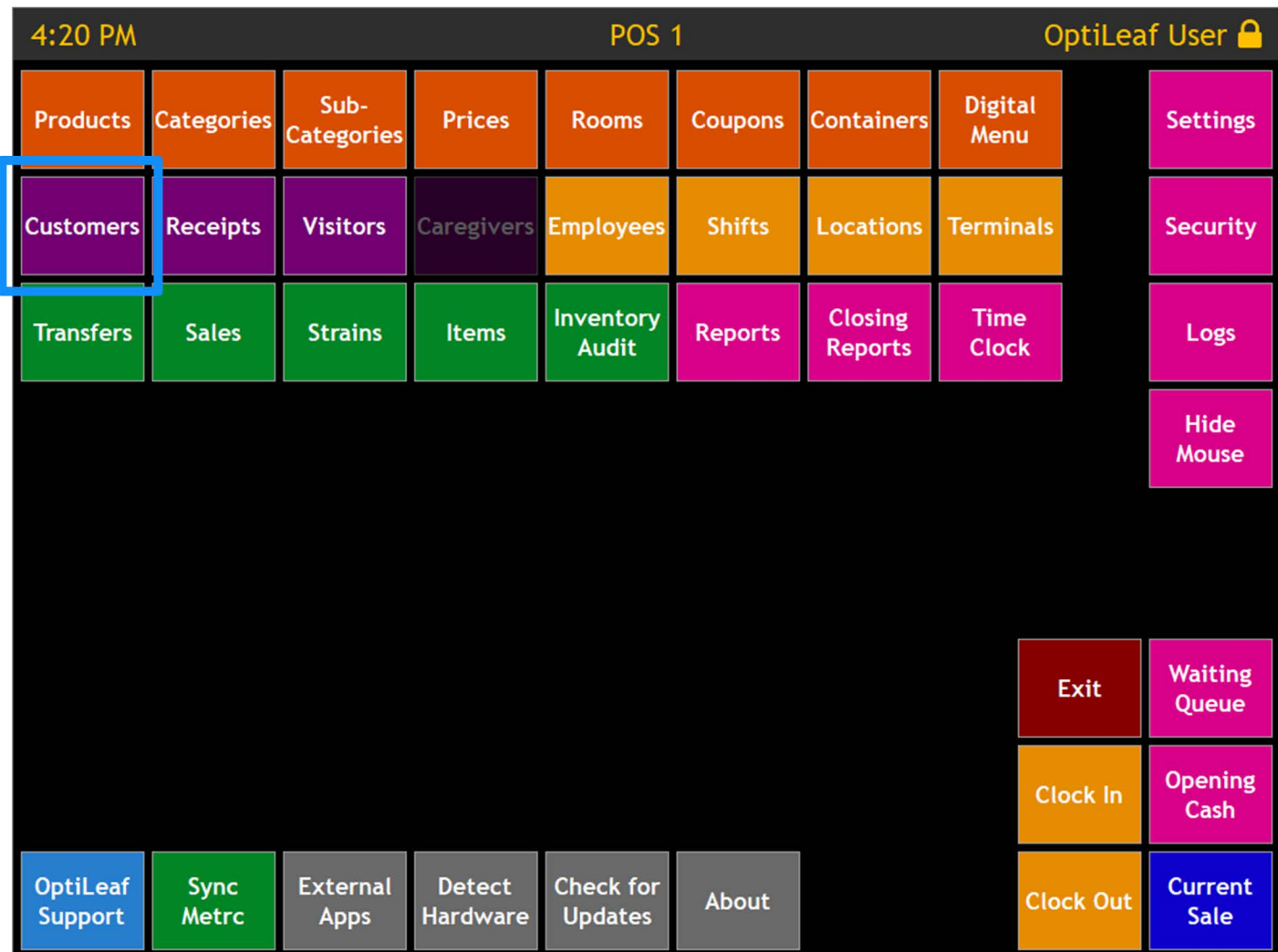
data sharing outline

optileaf setup: data sharing outline

in order to better understand how springbig and optileaf share information, we would like to show you what information specifically we collect through your point of sale

step 1.

to get started,
from the optileaf
admin page,
click on the
'customers'
button



optileaf setup: data sharing outline ^{part 2}

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from the customers section, select a patient and navigate to the **'profile'** option

the information that springbig captures from this profile will only include:

- 🌿 name
- 🌿 email
- 🌿 cell number
- 🌿 address
- 🌿 city
- 🌿 birthday
- 🌿 gender

note: the checkbox fields circled are **NOT** required. springbig will accept the data that is entered in these spaces regardless of this box being enabled

click **'save'** any time you are updating a profile

The screenshot shows a patient profile form with several sections and fields. Annotations with blue lines and boxes highlight specific areas:

- A box around the **Profile** tab at the top.
- A box around the **Marketing** section, which includes fields for Name, Email, Phone, Cell, Address, City, State, Group, Referral, Birthday, and Gender. Within this section:
 - Radio buttons for **Email?**, **Text?**, and **Mail?** are circled in blue.
 - A box around the Birthday and Gender fields.
- A box around the **Driver's License** section, which includes fields for License, Expires, and Facility.
- A box around the **Medical Card** section, which includes fields for License, Issued, Expires, Facility, and a **Tax Exempt** checkbox.
- A box around the **Save** button at the bottom right.

The form also includes tabs for **Card Images**, **Documents**, and **Notes**. The top left shows a clock at 4:20 and a patient ID. The bottom left has a **New** button.

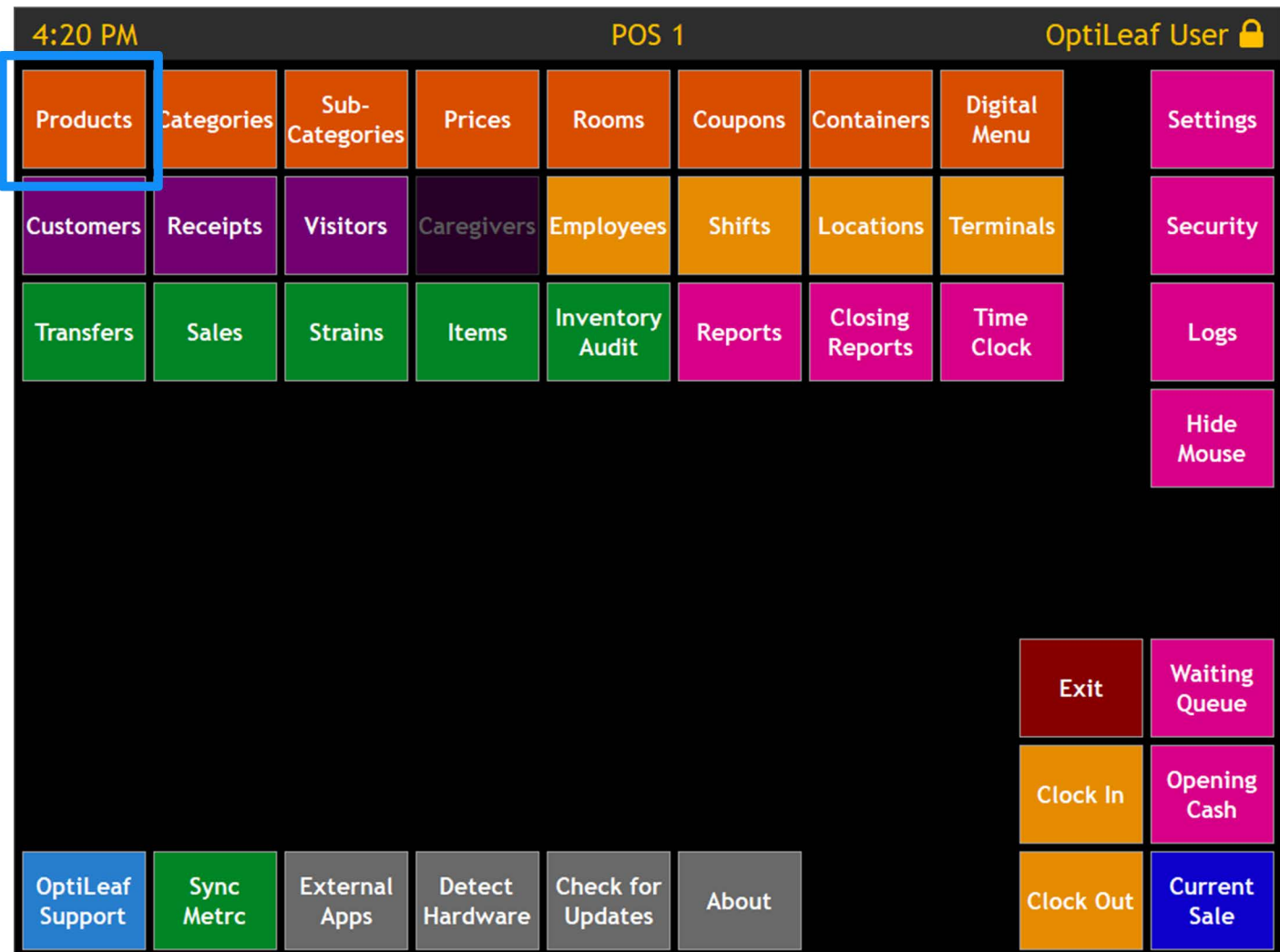
optileaf setup: data sharing outline ^{part 3}

p15

another way that springbig and optileaf share information is in capturing which products are in your inventory, what is being purchased most, and which products customers purchase most

step 1.

to get started,
from the optileaf
admin page,
click on the
'products'
button



optileaf setup: data sharing outline ^{part 4}

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when you give springbig access to your inventory and product data collected through optileaf, you give yourself the ability to target consumers in your text marketing based on their spending habits and product preferences

note: with this access to your optileaf POS system, springbig will capture a few data points on each product, including:

- 🌿 description
- 🌿 category
- 🌿 brand
- 🌿 base price

click 'save' any time you are updating a product

The screenshot shows the 'Info' tab of the Optileaf POS system. The form is divided into several sections. The top section contains 'Description' and 'SKU' (100000000000084). Below this is 'Stock' (0.0000) and 'Grams'. The 'Category' section includes 'Category', 'Subcategory', 'Item', and 'Room'. The 'Brand' section includes 'Brand' and 'Supplier' (In House). The 'Container' section includes 'Container' and 'Labels' (Print, Don't Print, By Category). The 'Base Price' section includes 'Base Price' (None) and 'Per Gram'. The 'Status' section includes 'Active' (checked), 'Tax Exempt', and 'For Members Only'. The 'Save' button is highlighted in green at the bottom right.

chapter 4

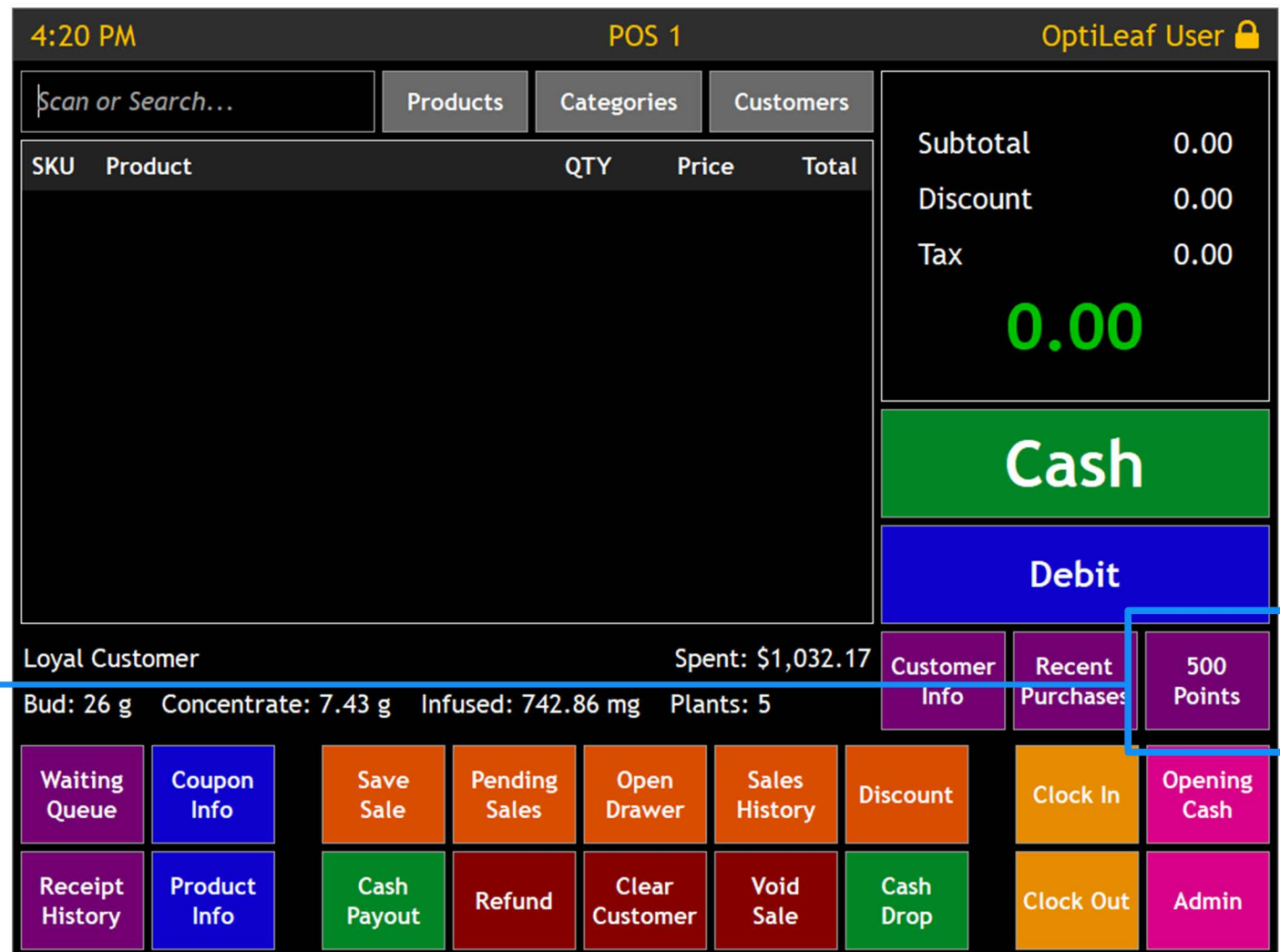
POS transactions

optileaf setup: POS transactions

an integration between springbig and optileaf also makes the process of viewing a customer's points, accessing available offers, and redeeming rewards seamless

step 1: first, you must select a customer at the POS system

step 2: to access the customer's available rewards/offers select the button that displays their **point balance**



optileaf setup: reward redemptions

once you've accessed the loyalty member's profile, you will have the option to choose between **'rewards'** or **'offers'** tabs. first, let us review **reward redemptions**

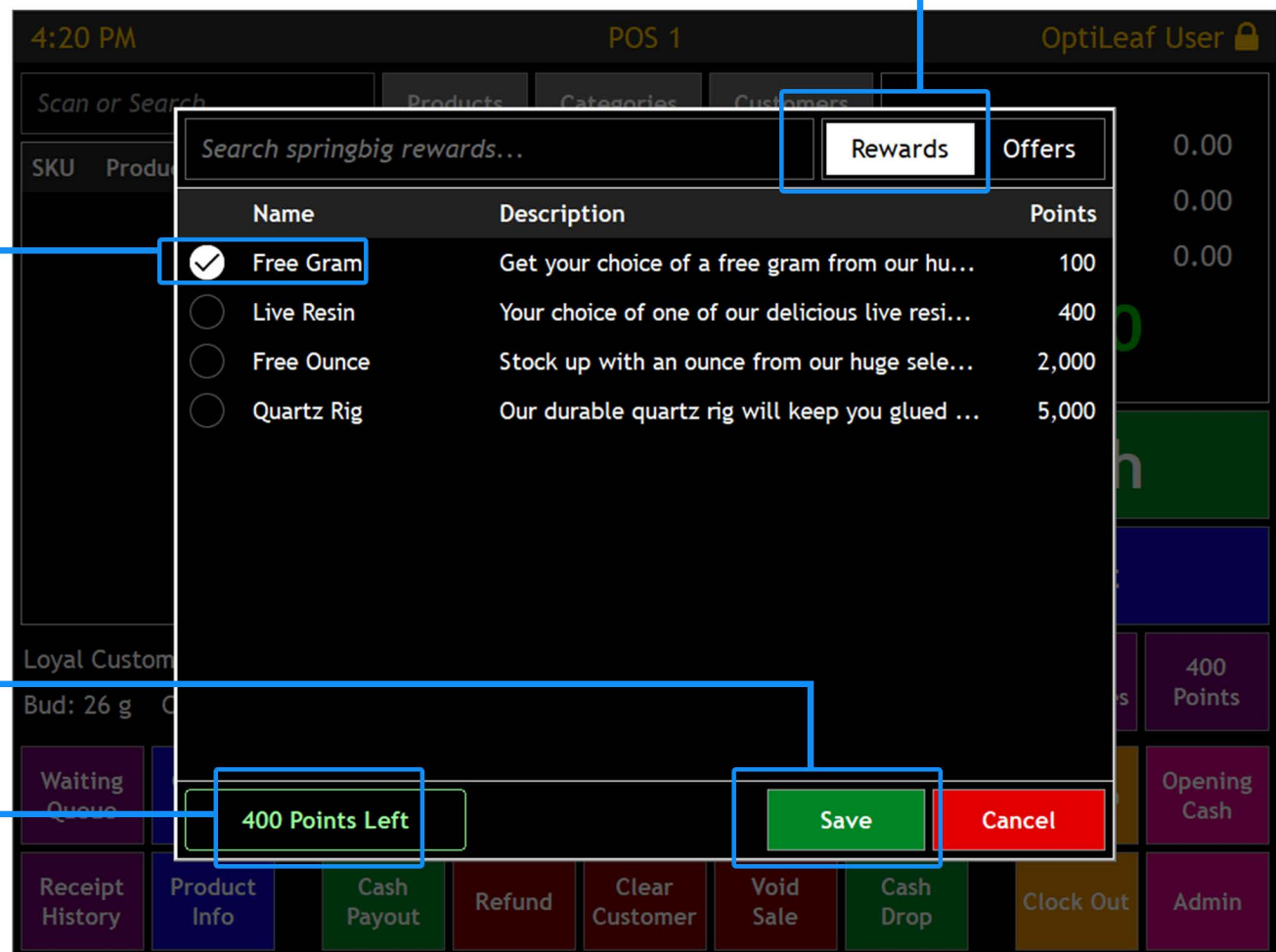
step 1: first, you will select the **'rewards'** tabs

step 2: select the reward you would like to apply to the transaction

note: this page will display all active rewards configured on springbig, along with the point value. the description is what you have defined in the coupon section of optileaf ([see page 10](#))

step 3: after selecting the reward, click **'save'**

note: the customer's point balance will update dynamically as rewards are selected



optileaf setup: applying offers

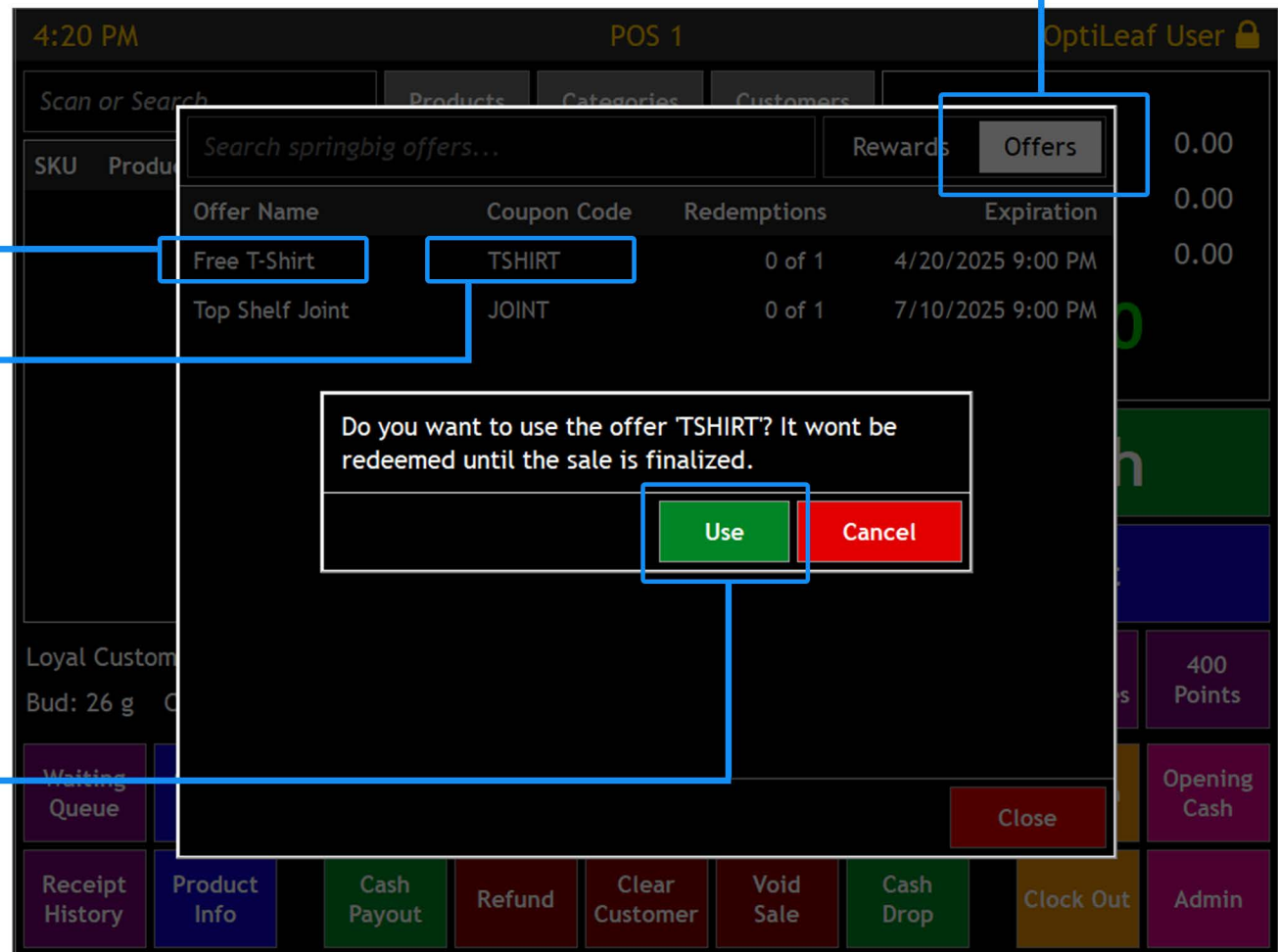
next, let us review **applying offers**. once you've navigated to this page, you will be able to see a list of all the available offers for the selected customer

step 1: first, you will select the 'offers' tabs

step 2: select the offer you would like to apply to the transaction

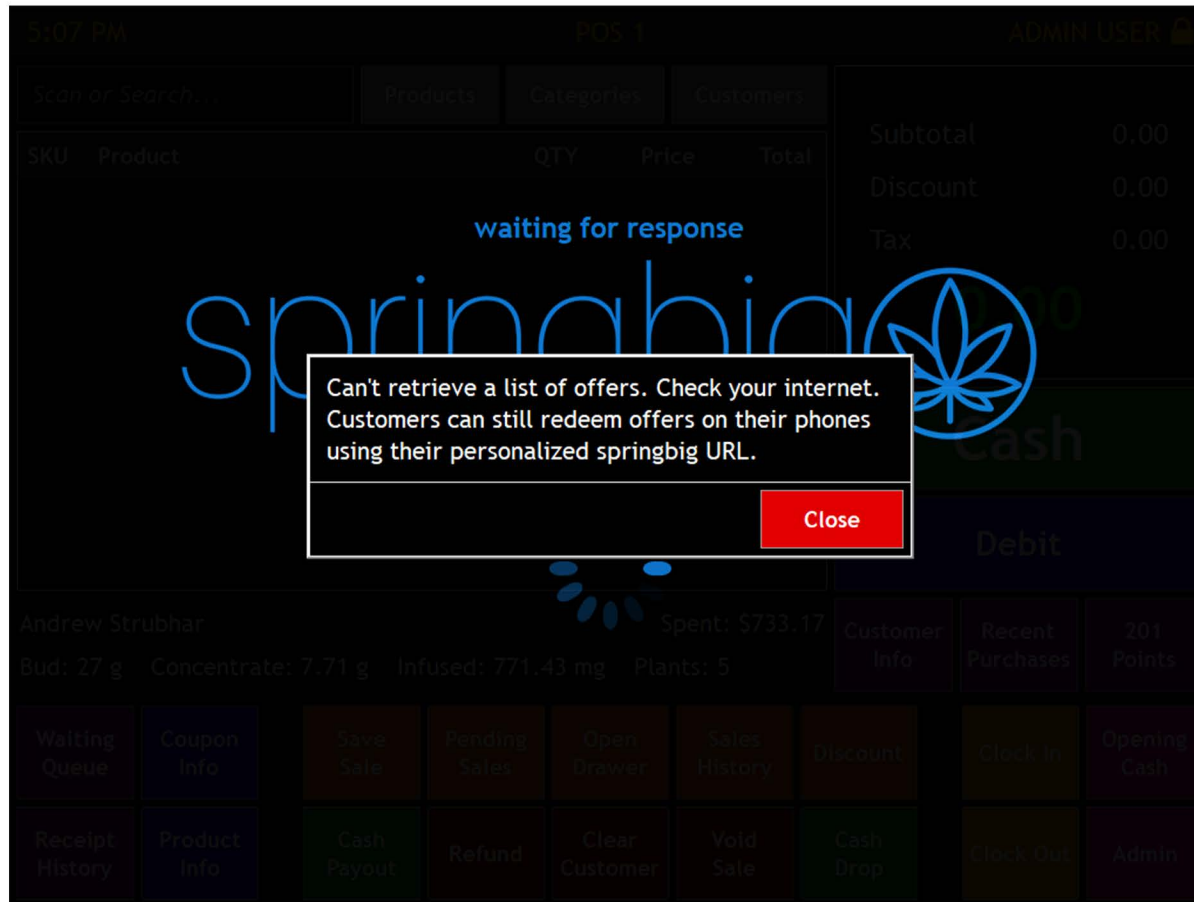
note: the 'coupon code' here is the code you create for each offer in the coupons section of optileaf (see step 4 page 10)- these codes can be numbers or letters, and are another way to make sure you are applying the right coupon

step 4: after selecting the offer, a pop-up will display. click 'use' to finish applying the offer



optileaf setup: troubleshooting

if optileaf experiences a service outage the redemption feature will **NOT** work.
this is intentional. a pop-up will alert the bud tender.

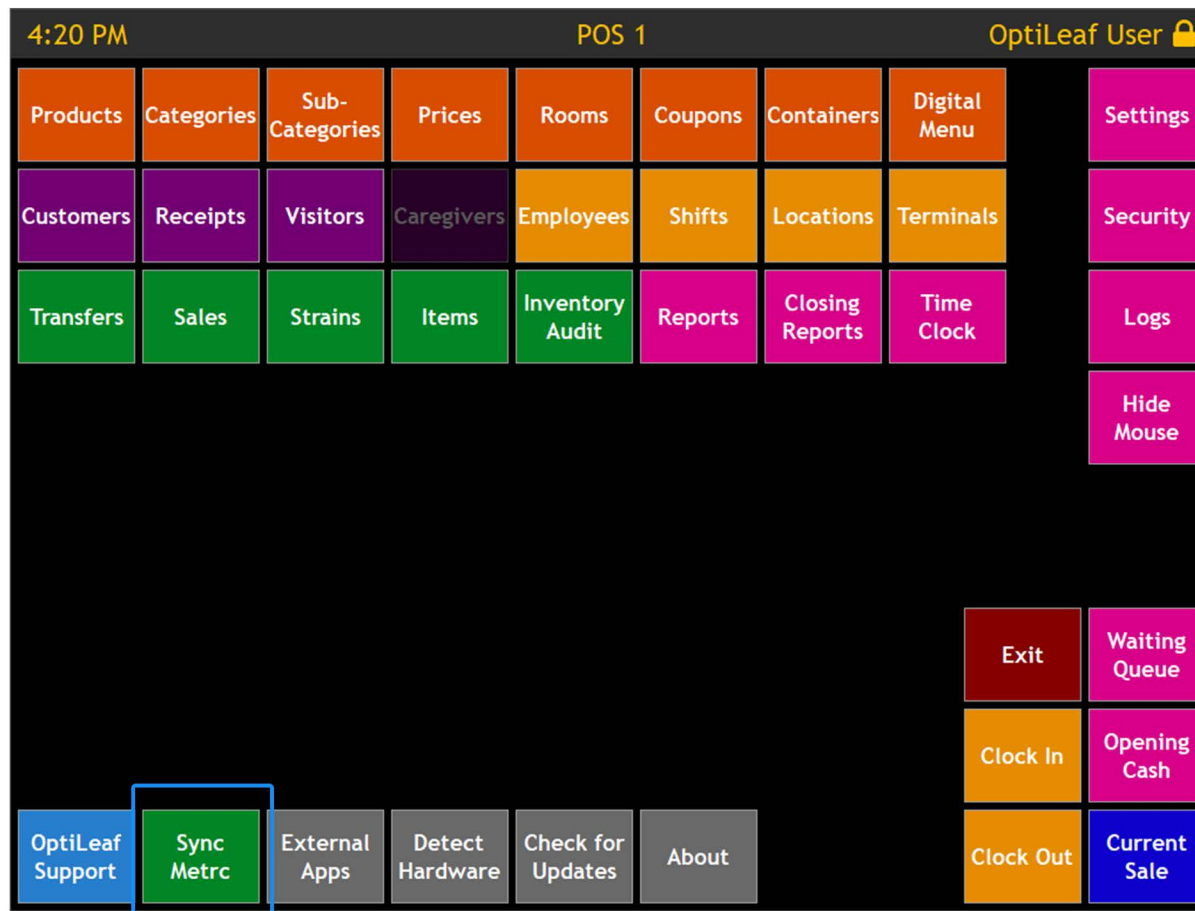


however, sales will continue to process in optileaf if they experience a service outage.
once they are back online, optileaf will send us the **members** and **transactions** that
were processed during that time

optileaf setup: troubleshooting ^{part 2}

optileaf has also included a button where the staff member can automatically trigger sending **members** or **transactions** to springbig once they are back online

step 1. navigate back to the **admin page**



step 2. select 'sync metrc' option to trigger data sync

if you are in need of further assistance
or have any questions about your integration,
please feel free to reach out to our
integrations team members:

tanner
ttobey@springbig.com

maria
mvizcaino@springbig.com