

SpringBig Integration - Setup



1. Open the SpringBig Setup page.
2. Enter the SpringBig URL, Token and API Key.
3. Enable Auto Synchronize.
4. Press OK.
5. Integrate with – select “Member Contacts”

A screenshot of a software interface showing the "SpringBig Setup" configuration page. The page has a top toolbar with icons for View, Edit, New, Delete, Notes, Links, Refresh, Clear Filter, and Go to. Below the toolbar, the "SpringBig Setup" title is displayed. Underneath, there is a "General" section with several input fields: "Code", "Staging Environment URL", "Live Environment URL", "Environment Type" (a dropdown menu), "Authorize Token", "API Key", "Auto Synchronize" (a checkbox), and "Integrate with" (a dropdown menu).

New Customers



1. Create/Check In a new customer/patient.
2. Press Save. If the Phone No. is unique and **Auto Synchronize** is ticked, the customer will be created in **SpringBig** automatically.

View - EPOS Main

Member Contact Management

Jon Jones
C00000062 - Active

Description	Text Value
Name	Jon Jones
E-Mail	jon@jones.com
Address	
City	
State	
Zip Code	
Phone No.	7052001281
Cell No	
Date of Birth	
Opt In SMS	No
Opt In E-Mail	No
Member Allowance	0
Flower Allowance Available	0
THC Allowance Available	0
Patient ID	
Driving License ID	
DL Expiry Date	
Doctor ID	

OK

Scan Drivers License

Clear

Search

New

Attach File

View File

Save

Block

Unblock

Existing Customers



1. Existing Customers can be sent to SpringBig using the **Create SpringBig Member** button

Edit - Customer Card - MC00000019 · kim kelly

HOME ACTIONS NAVIGATE REPORT

Dimensions Document Layouts Ledger Entries Entry Statistics Invoice Discounts Prepayment Percentages Quotes Issued Do
Cross References Prescriptions Statistics Statistics by Currencies Prices Recurring Sales Lines... Orders Blanket Or
Comments **Create SpringBig Member** Sales Item Tracking Entries Line Discounts Return Orders Jobs
Customer History Prices and Discounts Sales Documents

MC00000019 · kim kelly

General

No.:	MC00000019	Document Sending Profile:	
Name:	kim kelly	Total Sales:	
IC Partner Code:		Costs (\$):	
Balance (\$):	0.00	Profit (\$):	
Balance Due (\$):	0.00	Profit %:	
Credit Limit Total (LCY):	0.00	Language Code:	
Blocked:		Department Code:	
Salesperson Code:		Store Code:	
Responsibility Center:		Last Date Modified:	11/26/2018
Service Zone Code:			

Creating Customers



- Based on #2 and #3, customer will be created in SpringBig as below.

customer list

[add customer](#) [import customers](#)

search by name, email or phone number

Display: 15

join date	name	phone number	email	
2019-06-07	Jon Jones Jon Jones	7052001281	jon@jones.com	view
2019-06-06	Phil Jagielka Phil Jagielka	7026001458	phil@test.com	view
2019-06-06	Britnee Perry Britnee Perry	7026008891	britnee@test.com	view
2019-06-06	TestGreg TestGreg		greg@test.com	view
2019-06-05	test999 test999	7017771122	test999@tester.com	view
2019-06-05	Nic Makin Nic Makin	7026009990		view

Existing Transactions



1. Existing Transactions can be sent to SpringBig using the **Create SpringBig Visit** button

View - Transaction Card - MAD0001 - B01 -

HOME ACTIONS

Change Wrong Shift Marking

Move Trans. to New Shift...

SalesTax Entries

Create SpringBig Visit

Print

Functions General

MAD0001 - B01 - 1

General

Transaction No.:	1	POS Terminal No.:	B01
Transaction Type:	Sales	Staff ID:	1010
Statement Code:	B01	Customer No.:	MC00000004
Statement No.:		Sales Type:	
Posted Statement N...:		Receipt No.:	0000000B010000...
Entry Status:	Voided	Date:	11/14/2018
Transaction Code:		Time:	10:46:29 AM
Store No.:	MAD0001	Member Card No.:	C000000004
Created on POS Ter...:	B01		

▼ Show more fields

Creating Transactions



- When a new transaction has been completed or an existing transaction has been sent, it is created in SpringBig.

365vertical

home

campaigns

autoconnects

check-in

customers

check-in

check-in

customer	visit time	recorded via	transaction total	points earned
+ Sir Davos Seaworth Sir Davos Seaworth davos@kingslanding.com	4/24/2019, 5:00:00 PM	365 vertical	-\$22.66	-22
+ Jon Snow Jon Snow 702-600-1890	5/30/2019, 5:00:00 PM	365 vertical	\$138.50	139
+ Night King Night King 702-600-1122	5/30/2019, 5:00:00 PM	365 vertical	\$58.86	59
+ Sir Davos Sir Davos sirdavos@kingslanding.com	5/30/2019, 5:00:00 PM	365 vertical	\$55.40	56
+ Gavin Gavin gavin@test.com	5/30/2019, 5:00:00 PM	365 vertical	\$58.86	59
+ Sir Davos Seaworth Sir Davos Seaworth davos@kingslanding.com	4/21/2019, 5:00:00 PM	365 vertical	\$12.60	13
+ Sir Davos Seaworth Sir Davos Seaworth davos@kingslanding.com	4/21/2019, 5:00:00 PM	365 vertical	\$77.40	78