Birchmount Network

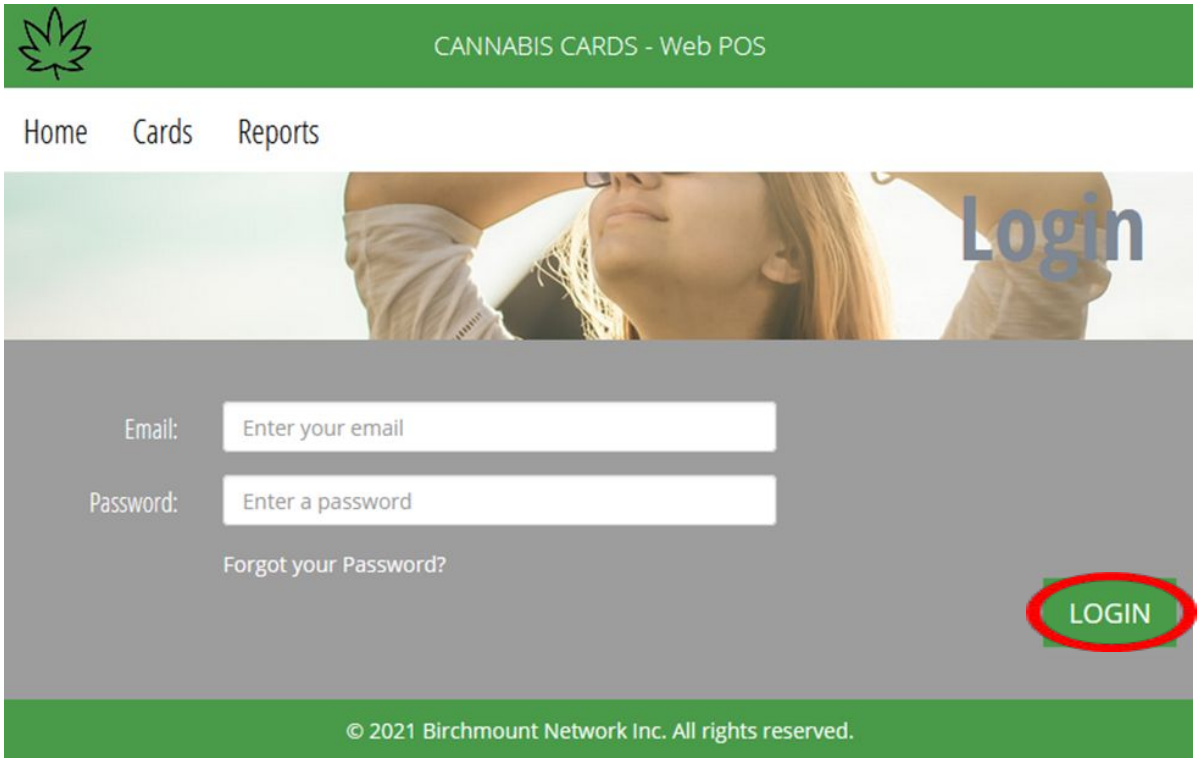
GIFT CARDS WEB POS PORTAL



The following presentation describes the steps you take to login to the system, lookup a Gift Card and perform an activation, redemption and reload.

Birchmount Network

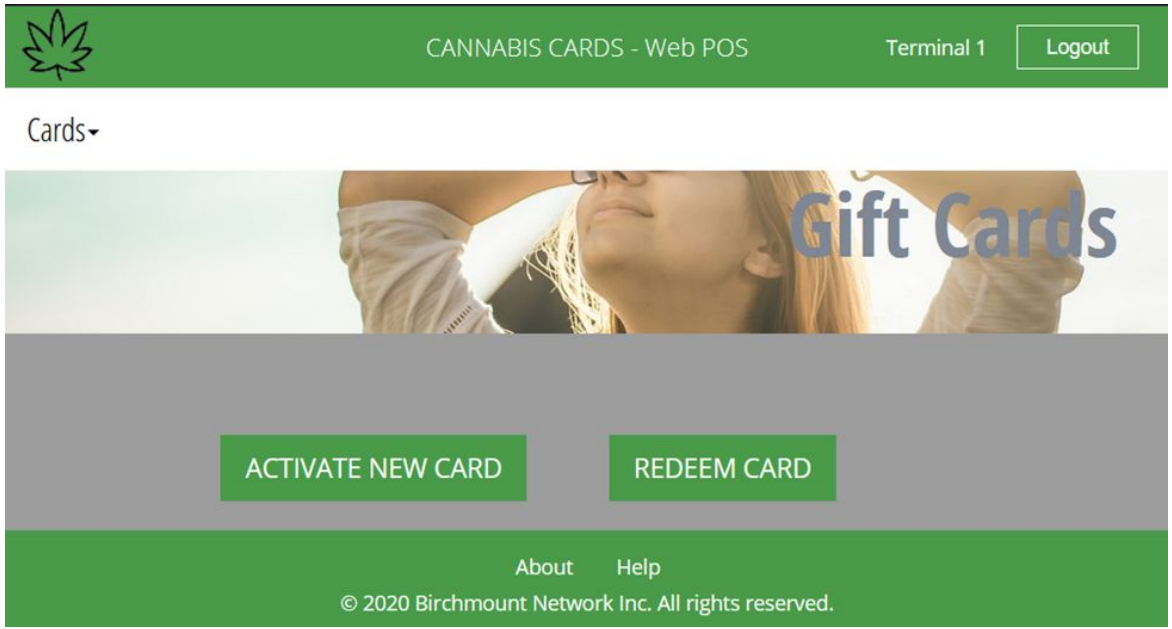
Login Visit the WebPOS URL and enter your username (email address) and password to login.



Main Landing Page

After login, you are on the main Gift Cards screen. This is your main screen and anytime you need to get back to this screen, you can click/touch the top left Leaf Logo to return here.

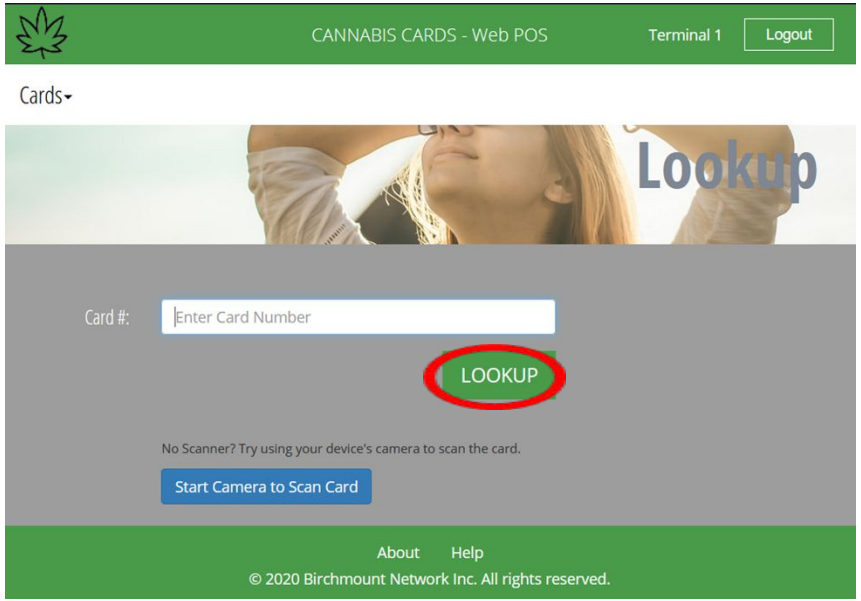
From this screen you can Activate a New Card when it is purchased and Redeem a Card that is being used to pay for an order (in part or whole). You can also use the Cards menu to get to other screens within the system



Card Lookup

You can access this screen from the Cards menu.
It is also the same screen that you see when you initiate a Redemption from the main landing screen.

Either manually enter the card number or use a scanner that you have attached to your terminal to scan the Gift Card's barcode. If you do not have a scanner and your device has a browser that supports the use of your camera, then you can use the camera option on the screen.



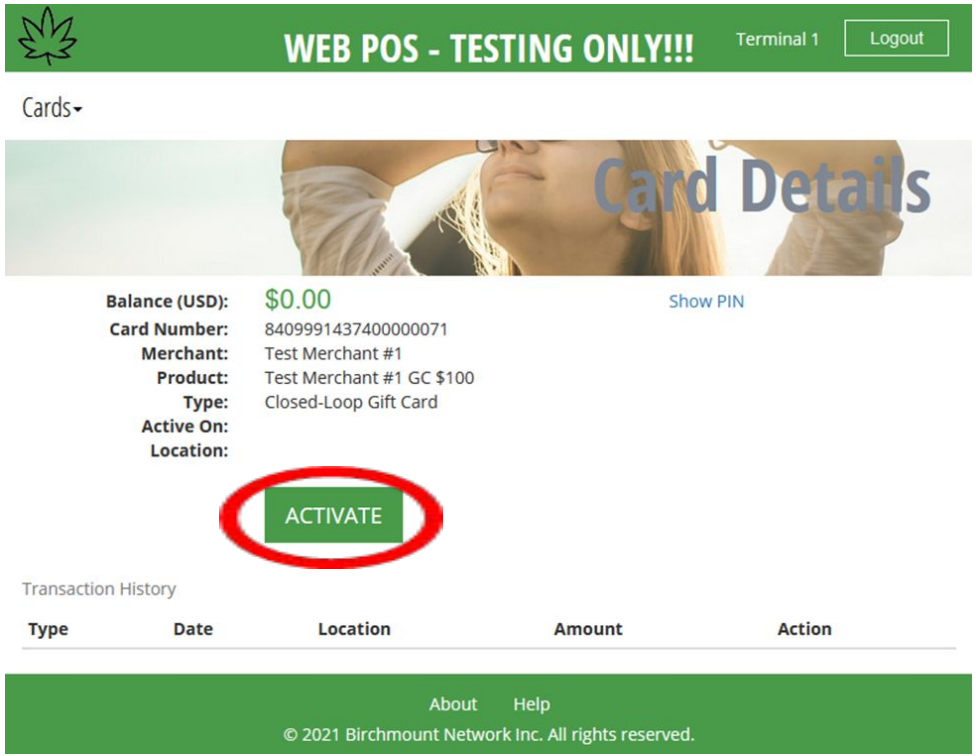
Locating the Bar Code: For physical cards, the 19 digit card number is located on the back of the card. For E-Gift cards, the Barcode and QR code are visible on the certificate as well as in the bottom Reference section.

Then click/touch the "Lookup" button.



Card Details Screen

When you perform a lookup on a Card, we display the details of the card on this screen. It is from here where you can perform Activations, Redemptions and Reversals as necessary.



Tip: You can view the security PIN by clicking/touching the “Show PIN” text on the screen.

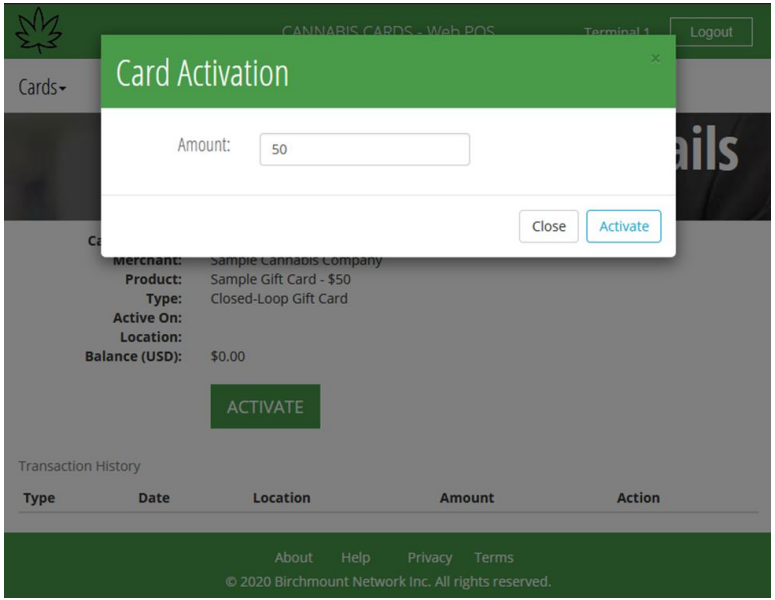
You can reference that for security purposes and compare it against the PIN on the card.

You will need this value to perform a redemption later.

Activate a New Card – Customer purchases a new card

From the Card Details screen, click/touch the “Activate” button and a small window will popup asking you to enter the amount of money to add to the card.

IMPORTANT NOTE: Cards that are Fixed-Value have their values pre-set, so all you need to do is click/touch the Blue “Activate” button to confirm the activation



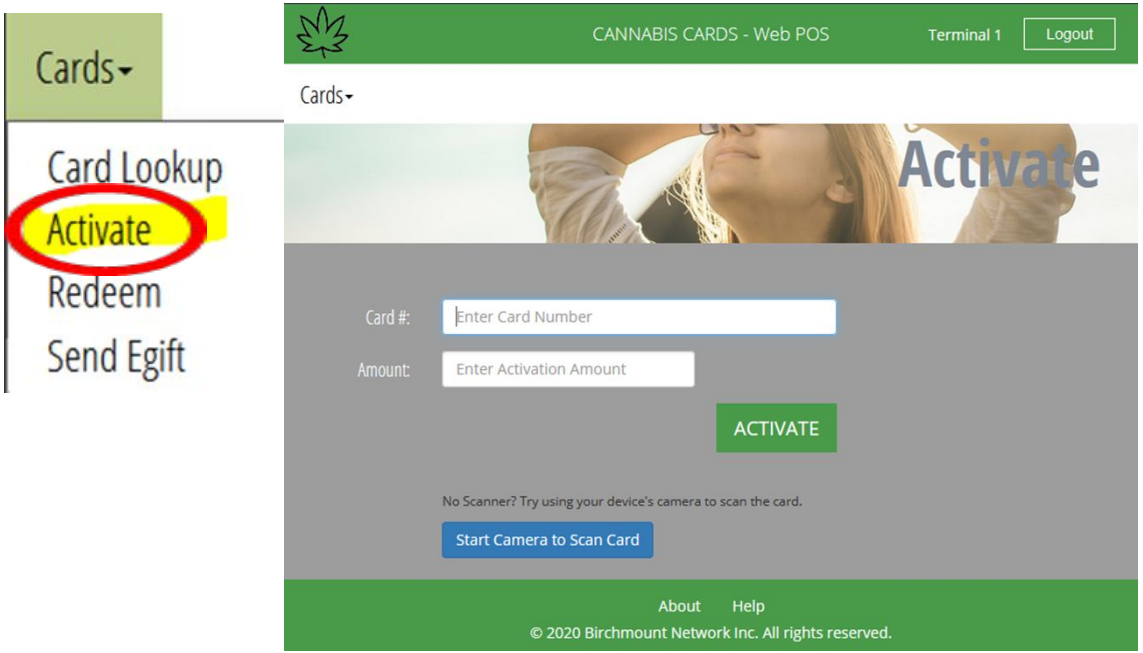
Assuming the activation is successful, you will see a Success notification and then the Card details screen will refresh showing you the updated card information and transaction history.

Alternative approach

An alternative approach to activating a card is to bypass the lookup step and go to the Card Activation screen directly from the Main page or from the Cards menu.

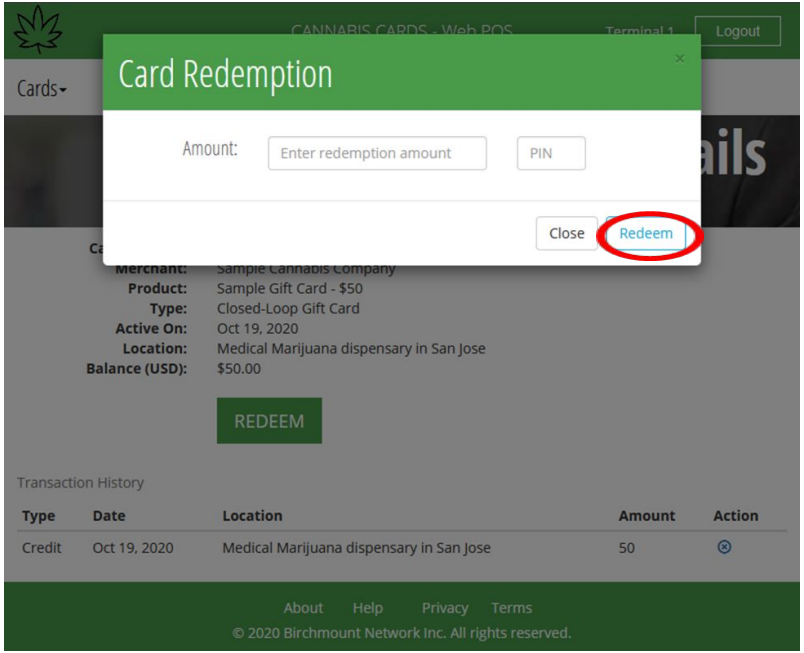
Activate a New Card

From this screen, you can either manually enter the card number or use a scanner that you have attached to your terminal to scan the Gift Card barcode, located on the back of the card. Then enter the amount you wish to activate on the card and click/touch the “Activate” button.



Redeem Card – Customer uses card as payment for a purchase

To redeem funds from a card that is being used as payment for a purchase, you perform the card lookup as described in the previous steps and then, from the Card Details page, you click/touch the “Redeem” button.



A small window will popup asking you to enter the amount of money you wish to redeem from the card.

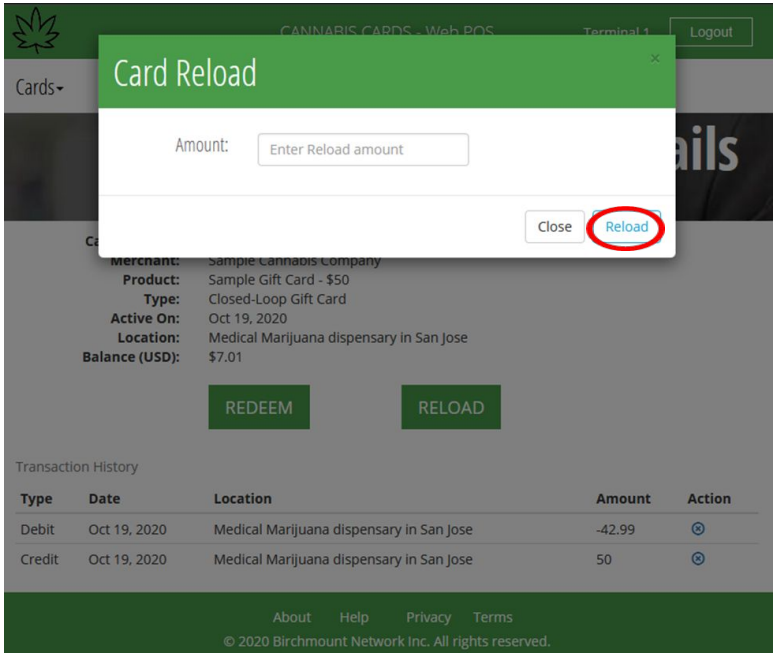
For security reasons, you will also want to enter the 4-digit PIN number that is typically found under the scratch panel on the back of the card.

If redeeming an E-Gift card, the PIN is found near the barcode.

When ready, you click/touch the blue “Redeem” button to confirm the redemption.

Reload Card – Customer wishes to add more funds to an existing gift card

If your account supports the ability to allow a customer to add more funds to an existing card, you can perform that action from the Card details screen.



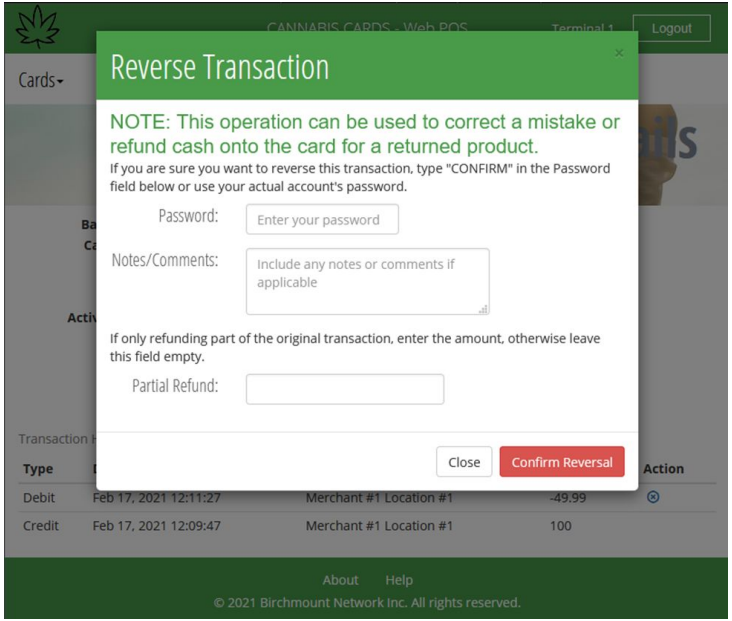
Click/Touch the “Reload” button and a small window will popup asking you to enter the amount of money to add to the card.

Note: Only certain accounts and gift card types support this option! (Check with your Account Manager)

Reversing a Transaction

What if you make a mistake or need to process a refund?

If you are testing a gift card, make a mistake, need to “undo” a transaction for any reason or if you need to process a product refund onto the card, in the Transaction History section, you will notice that there is an icon in the Action column on the right*.



When clicked, a small window will popup asking you to enter your account’s password, or type the word CONFIRM, to authorize the reversal.

***NOTE**: You cannot reverse a credit transaction after it has been processed by our bi-monthly invoicing program; (1st-15th, 16th-31st) the reversal icon will be hidden from view in this situation

To correct this transaction outside the billing cycle, email support@birchmountnetwork.com for help.

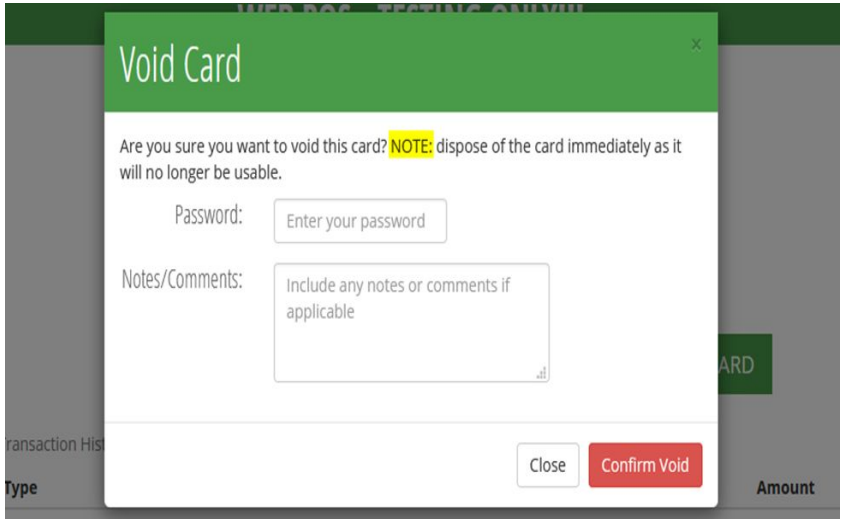
Reversal Complete

After confirming the reversal, the Card Details page will display the updated card information and transaction history as per the screenshot below. You can see that the system maintains the history of all transactions performed.



Void a Card – Due to Fraud or Damage (Manager only)

If a card becomes damaged or there is a need to completely dispose of the card due to any fraudulent reasons, Managers have the ability to void the card using the “Void Card” button within the same billing period of the original transaction. (Note: this option is not available to Employee or Terminal user accounts). Once a gift card is voided, it can no longer be used.



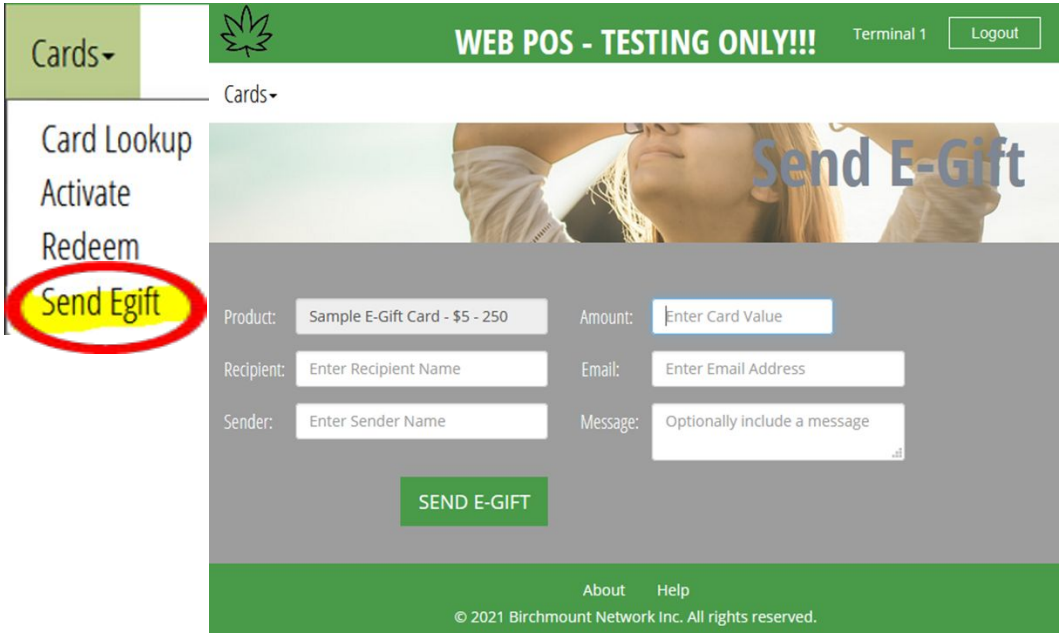
When clicked, a small window will popup asking you to enter your account’s password, to authorize the void. It is also good practice to provide some details of why the card is being voided for historical auditing purposes. When you are ready, you click/touch the red “Confirm Void” button.

***NOTE**: You cannot void a card in WebPOS after it has been processed by our bi-monthly invoicing program; (1st-15th or 16th-31st) the Void Card button will be hidden from view in this situation.

If you still need to Void a gift card, contact our customer support at support@birchmountnetwork.com before the next billing cycle.

Activate/Send an E-Gift Card

If you are setup with an E-Gift card product, you can email a digital e-gift card to a recipient.
To do this, use the “Cards” menu option and select the “Send Egift” option.



You will see the following screen to fill in the E-Gift details.

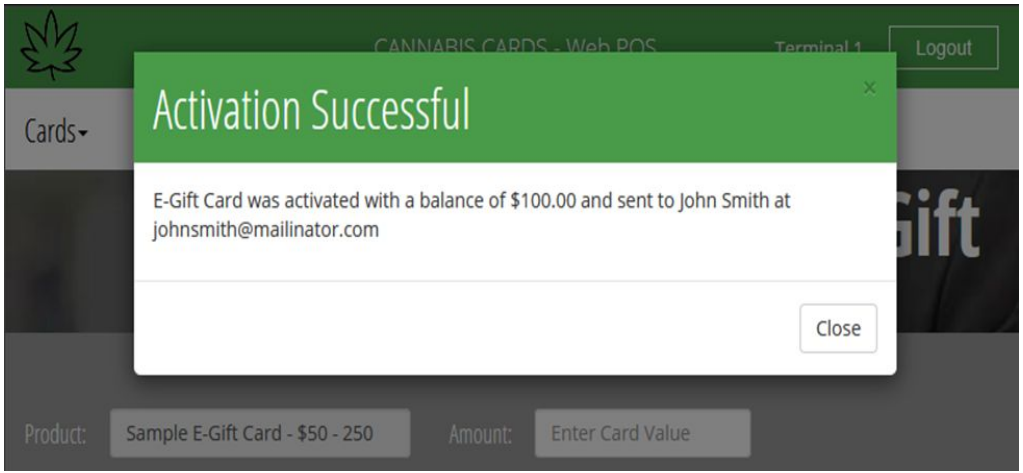
If you have more than one location, select the location you wish to charge this transaction to. The Sender and Message fields are optional.

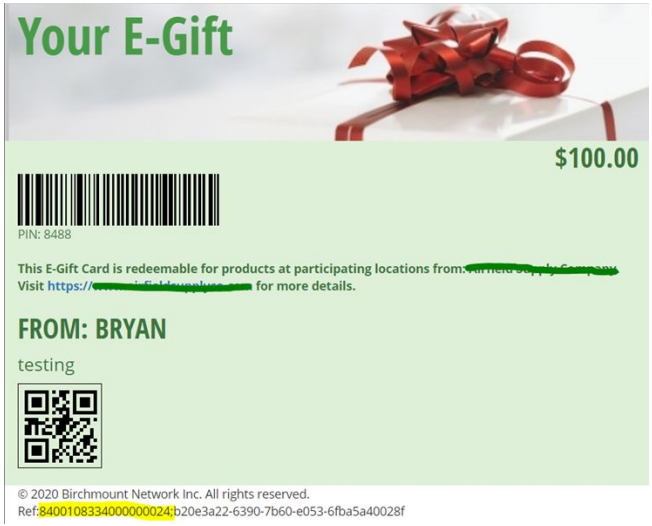
Once you have completed the form, click/press the “Send E-Gift” button.

E-Gift Card Activation

You will receive a confirmation of the activation as per below.

An email will be sent to the email address provided along with a Claim Link for the recipient to claim and view their E-Gift.



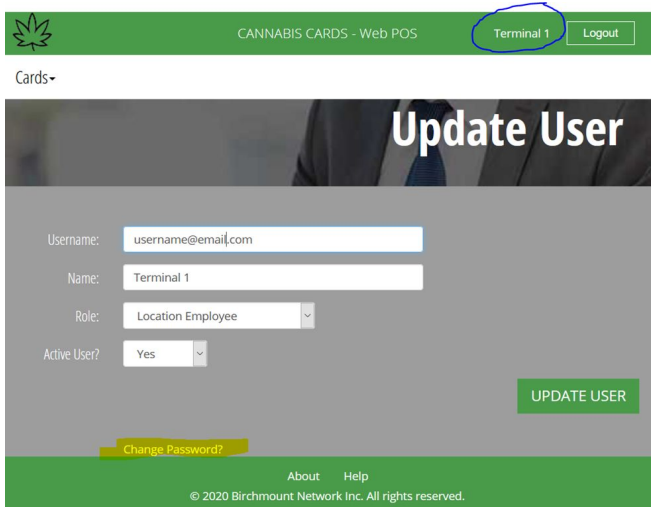


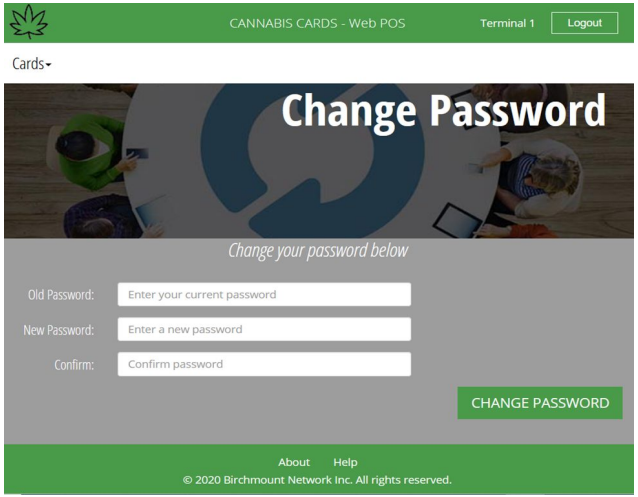
The 19 digital barcode and QR code are visible on the front of the certificate

Change your Password

If you wish to modify your password, you can do this from the Update User screen. You get to this screen by clicking/selecting your account name in the top right corner of any screen.

From this Update User screen, there is a Change Password link at the bottom of the page. By clicking/selecting that link, you will be directed to a page whereby you can choose a new password for your account.





Simply complete the form by entering your existing password and then your new password.
Note: The new password must be at least 8 characters in length, but you can reuse old passwords

WEB POS USER ACCESS

Birchmount Network	Merchant Users	
Level 1 Permission	Merchant Owner	Can access all reports to view and export activation/redemptions, Payment/Settlement Statements and Inventory for all locations. Can view users and manage user permissions for all locations. Can perform card activations and redemptions.
Level 2 Permission	Merchant Billing & Accounting	Can only access Reports menu to view and export activations/redemptions and Payment/Settlement Statements.
Level 3 Permission	Location / Regional Manager(s)	Can access reports to view and export activation/redemptions, invoice statements and inventory management for only their location(s). Can view and manage users for their location(s). Can perform card activations and redemptions for their location(s).
Level 4 Permission	Location terminals or individual employees	Could be a person or a terminal (POS device) i.e. terminal#1, terminal#2 etc. for a specific location Can perform card activations and redemptions only for designated terminal or employee

4 TYPES OF USER PERMISSIONS

Merchant Owner - Access to view and export all Reports: Activations, Redemptions, Payment Statements, Settlement Statements and Inventory. View and manage User permissions for all locations. View and update gift card inventory. Can activate, redeem and void gift cards.

Merchant Billing & Accounting - Access to view and export all Reports: Activations, Redemptions, Payment Statements and Settlement Statements.

Location Manager - Same access at the Merchant Owner but only for the designated location.

Location POS Terminal or Employee - Activate and redeem gift cards on a designated POS terminal

WEB POS USER WELCOME EMAIL

Birchmount Network

Your WebPOS User Account Instructions!

Hi Rachel Henry,

A new account has been setup for you to access the Cannabis Gift Card WebPOS system, provided by Birchmount Network Inc.

Use the link/button below to access the WebPOS system, setup your password and login to your account.

Your username to login is: rachel@barbarycoastsf.com

Access your account

If you are having trouble clicking the button, please cut and paste this URL: https://www.budspos.com/admin/verify-password-token.php?newUser=Y&token=XCqgAgQMbgABGdxYyhUa&username=rachel@barbarycoastsf.com into your browser..

If you received this email in error, please disregard or notify us with an email to support@birchmountnetwork.com.

The Birchmount Team

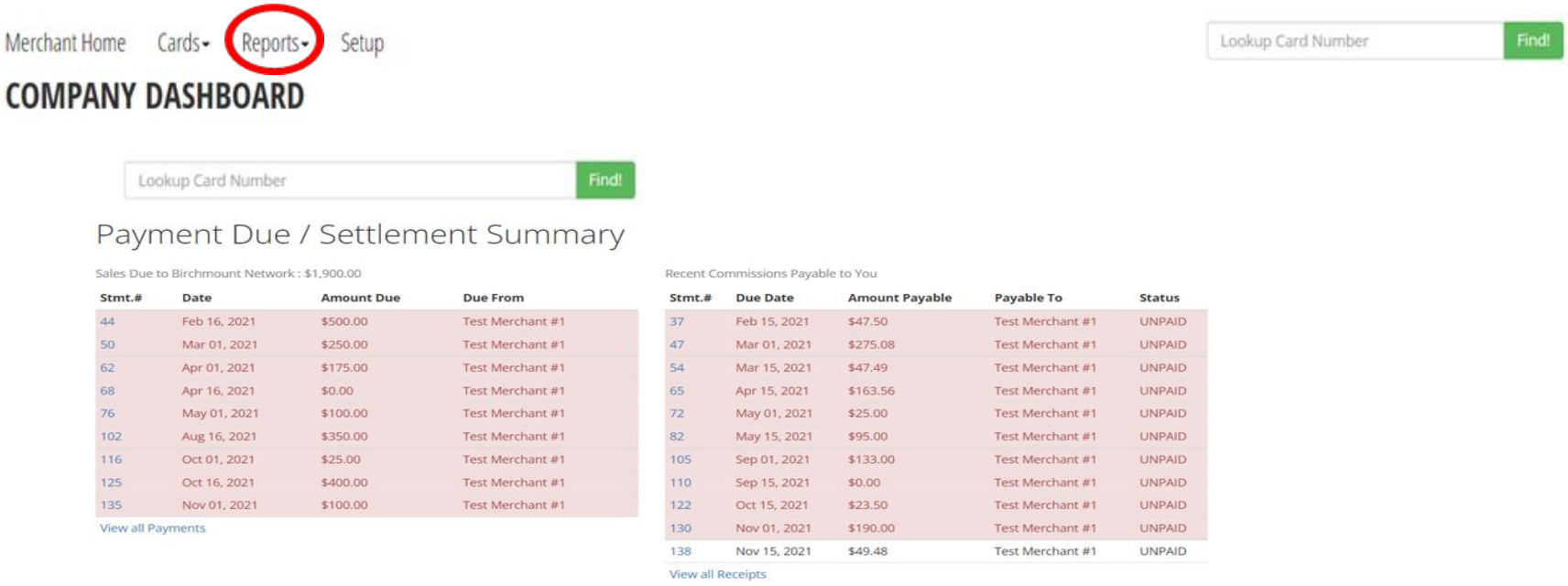
Please add **giftcards@birchmountnetwork.com** to your address book to ensure Inbox delivery.

Home Page – COMPANY DASHBOARD

The Home Page provides a settlement summary of payments due to Birchmount Network (Table on the left) as well as monies payable to your locations (Table on the right).

It also provides a field for specific card lookups.

Use the **Reports** drop down list to select the specific Report you would like to view.



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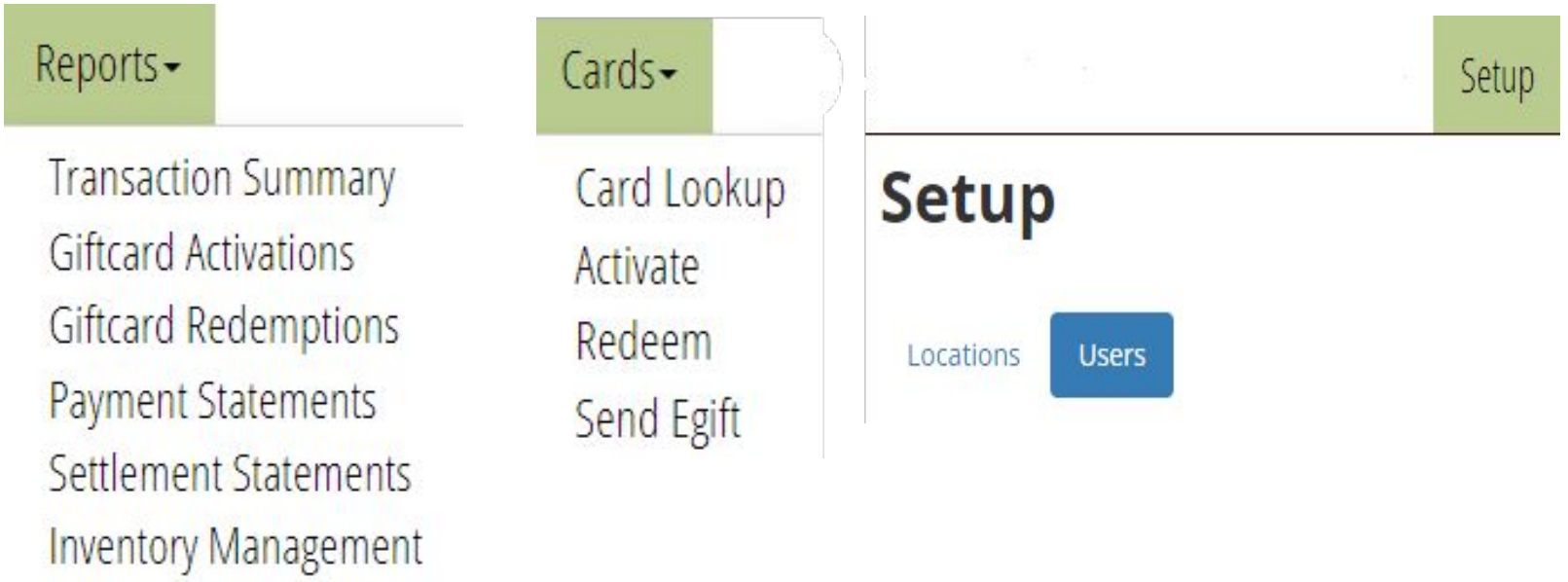
Drop down Menus

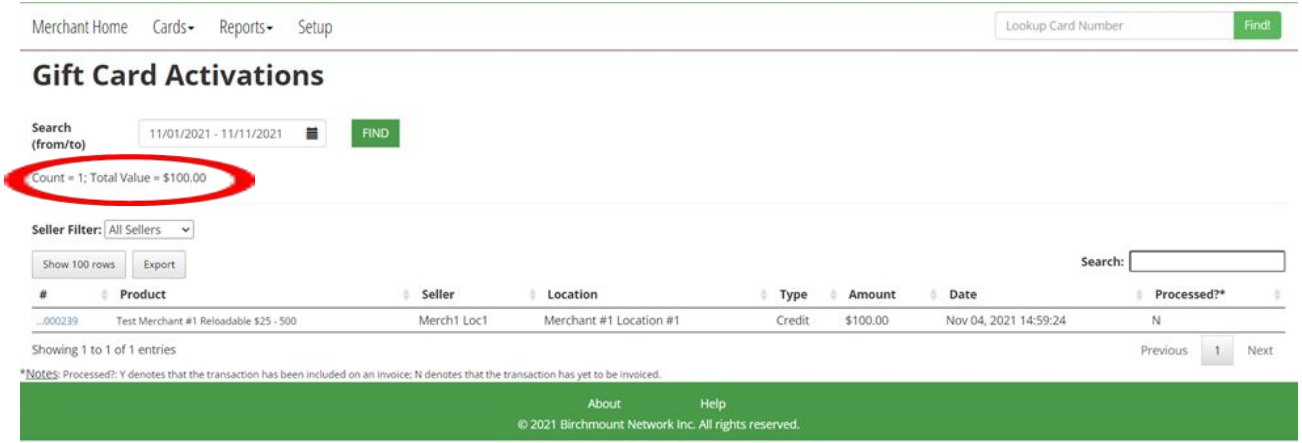


Gift Card Activations Report

Activations Reports list Gift Card sales for a specified time frame as selected via the **Search** bar drop down list. After clicking FIND, the list appears by store location.

- The first column indicates the Gift Card number and is clickable to view additional details.
- The column labelled **Processed** indicates whether the transaction has been settled or not.
- The Count and Total Value summary at the top left, under the Search filter (circled in red below).

You can filter by location name by selecting one from the **Seller Filter** dropdown.

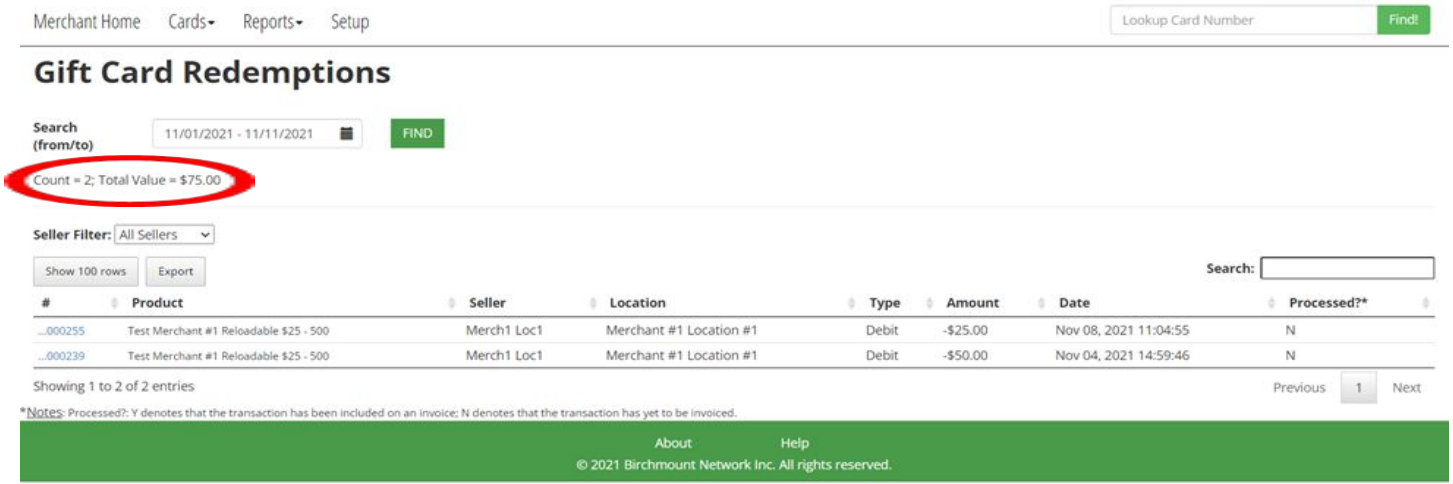


Gift Card Redemptions Report

Redemptions Reports list Gift Cards redeemed for a specified time frame as selected via the **Search** bar drop down list. After clicking FIND, the list appears by store location.

- The first column indicates the Gift Card number and is clickable to view additional details.
- The column labelled **Processed** indicates whether the transaction has been invoiced or not.
- The Count and Total Value summary appears at the top left, under the **Search** filter (circled in red below).

You can filter by location name by selecting one from the **Seller Filter** dropdown.

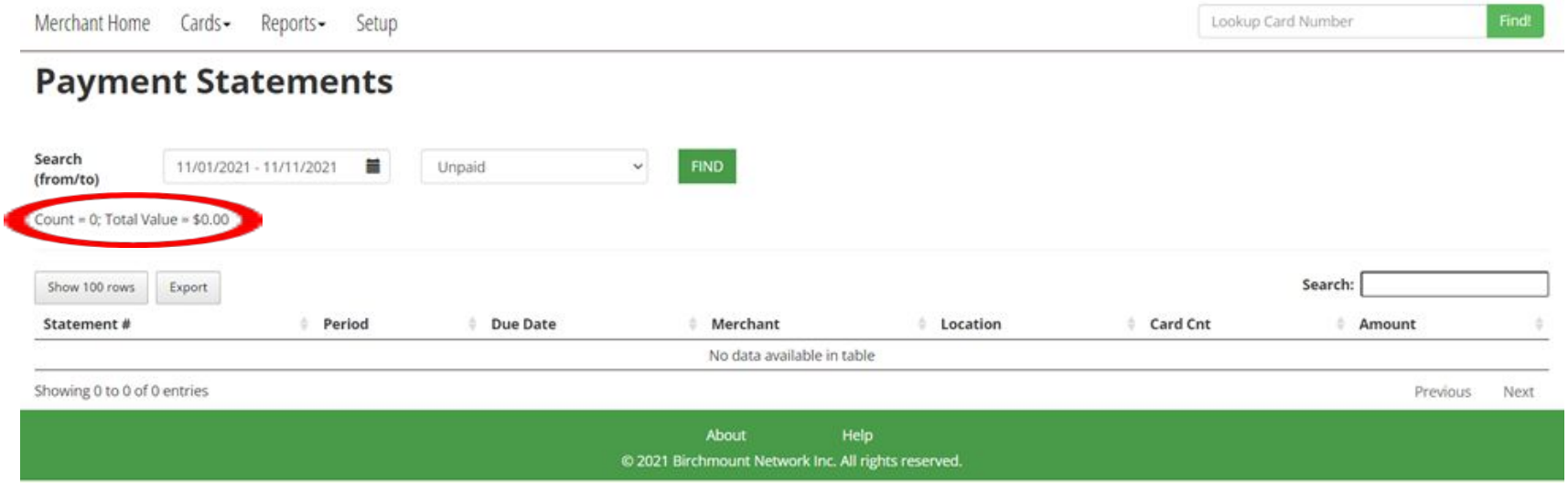


Payment Statements (Activations)

Payment Statements indicate what is owing to Birchmount Network during a specific Payment Window, as selected from the **Search** drop down list. After clicking FIND, the list appears by store location.

The Count and Total Value summary appears at the top left, under the **Search** filter (circled in red below).

Click the **Statement #** to view Activation details.

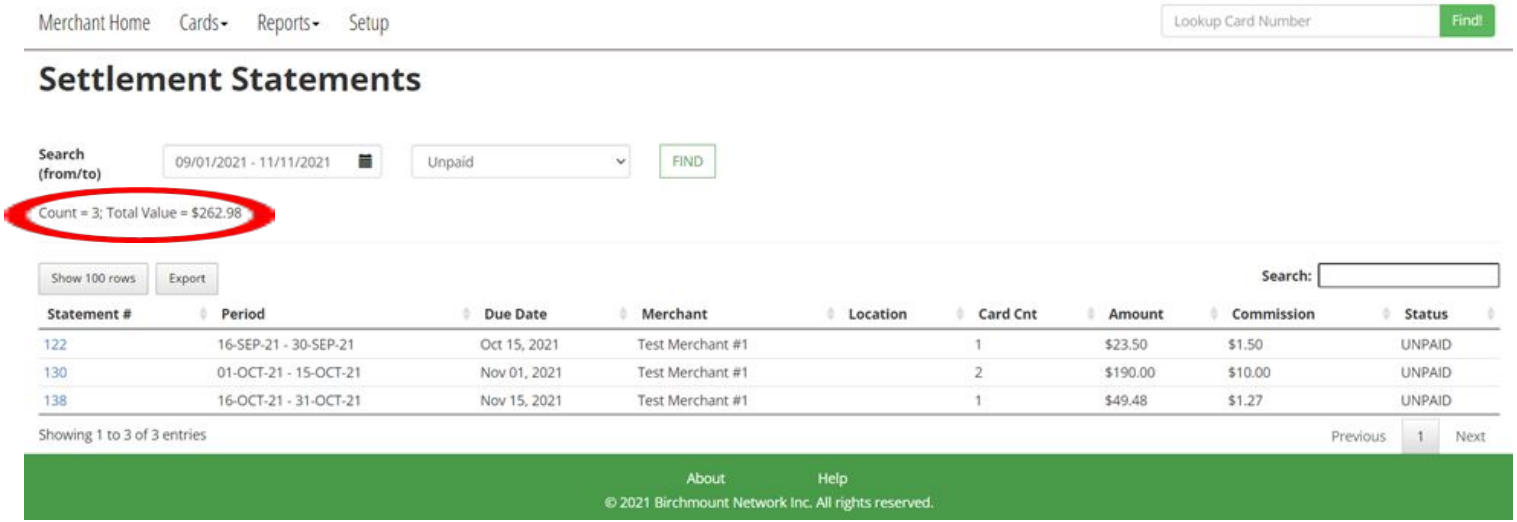


Settlement Statements (Redemptions)

Settlement Statements indicate what's owing to you from Birchmount Network during a specific Payment Window, as selected from the **Search** drop down list. After clicking FIND, the list appears by store location.

The Count and Total Value summary appears at the top left, under the **Search** filter (circled in red below).

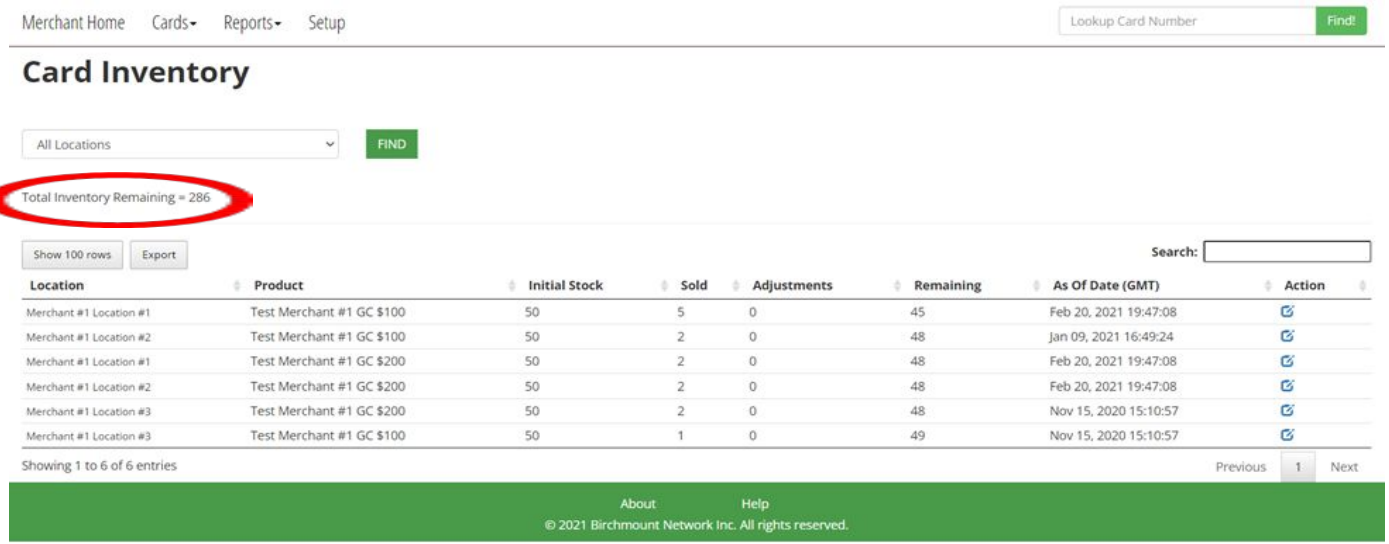
Click the **Statement #** to view Redemption details.



Inventory Management

Birchmount enters your initial stock by location. Card sales reduce this inventory automatically to show stock **Remaining**. If you have moved inventory from location to location, it will not be indicated here unless you inform Birchmount or manually update the inventory in the Web POS portal.

The **Total Inventory Remaining** (circled in red below) that displays when *All Locations* is selected, is the best indicator that you need to place a gift card order. Please allow 3-4 weeks for card delivery from time of order.

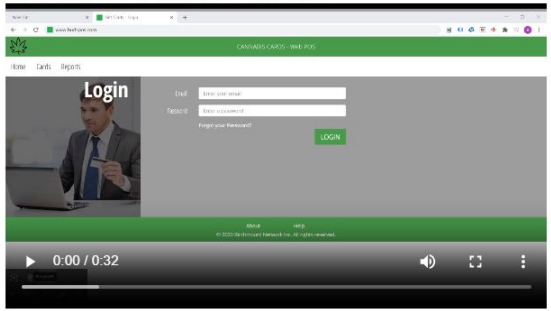


HELP

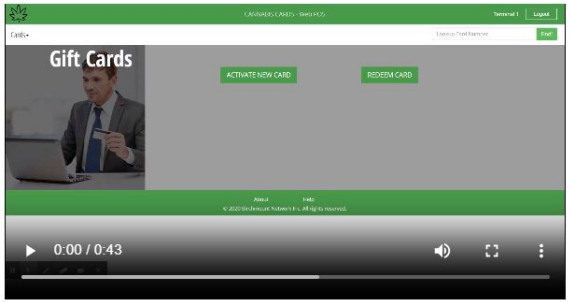
Select the **Help** at the bottom of the screen to view and download video demonstrations and the Web POS User Instructions Guide.



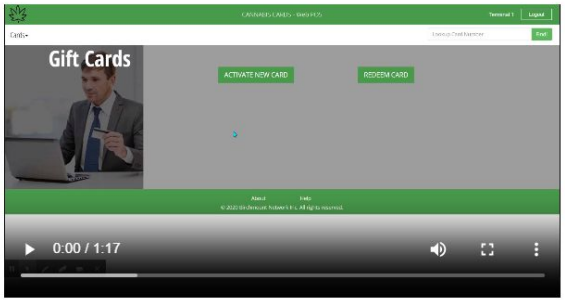
GETTING STARTED - VIDEO



ACTIVATE A NEW CARD - VIDEO



REDEEM A CARD - VIDEO



If you have any questions, please send an email to support@birchmountnetwork.com and we'll be happy to assist you.

Birchmount Network



CANNABIS GIFT CARDS TRAINING

GIFT CARDS

Birchmount Network

We offer 3 types of Training:

1. Management Training

POS Terminal setup, Gift Card Transactions
(Activations/Redemptions/Reversals/Void)

2. Budtender Training

Activating and Redeeming and Balance Lookup of Gift Cards.
(This may be lead by the Merchant Owner or Manager)

3. Web POS Reports Training

This is specific to Merchant Owner, Managers & Accounting
(Billing reconciliation and inventory management)

BUDTENDER TRAINING COURSE 1

Birchmount Network

Birchmount Network has created an online training module to help budtenders understand the importance of gift cards to your business and how they can promote gift card sales and customer engagement.

Our goal is to help you motivate your budtenders to champion gift cards and increase your in-store sales.

The estimated time to complete the module is just 10-20 minutes.

There is no cost to you to participate. Simply share this enrollment link with your budtender staff. Remember to hit the big purple button that says: "Join Birchmount Community".

Scan the QR code below to link to the course.

Here's the link

Free Gift Card training for Budtenders



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Gift Card Program Success: CHECKLIST





GIFT CARD INVENTORY
Are you stocked up for the holiday season?



GIFT CARD HOLDERS
Have you ordered and displayed card sleeves?



COUNTERTOP DISPLAY
Do you have attractive gift card displayers?



BUDTENDER EDUCATION
Are your budtenders incentivized to sell gift cards and do you have a gift card champion in each store?



SOCIAL MEDIA & EMAIL
Have you called out gift cards on your social media and to loyalty members?



PROMOTIONS
Have you planned holiday promotions and cross selling opportunities?



WEBSITE
Have you called out gift cards on your website?



INSTORE SIGNAGE
Have you called out gift cards on your digital screens?



E-GIFT CARDS
Have you requested your customized digital store?



THEMED GIFT CARDS
Have you considered creating themed gift cards for gifting events?



NEW LOCATIONS
Don't forget to keep us informed about new locations as you add them!



REPORTING & ANALYSIS
Remember to use our reporting tools for learning and planning.

Birchmount Network

Schedule a quick 15 min virtual call with your **Birchmount Account Manager** to review the Web POS portal and learn how we can help your business grow.

THANK YOU