



Training Manual 2.0

POS Module

LeafLogix
SEED-TO-SALE CANNABIS ERP

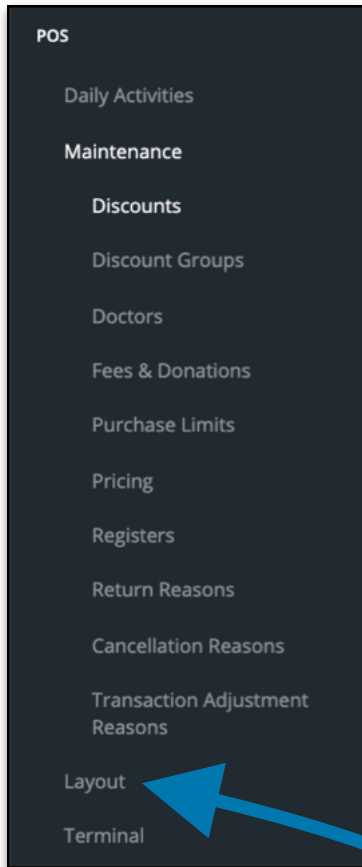
Section 07: POS Module: Welcome!

The LeafLogix **POS Module Manual** will help you understand LeafLogix's retail configuration settings - principally those located under **POS > Maintenance**. These settings help determine system behaviors in the **Point of Sale** terminal (the retail frontend). . These settings need to be completed before beginning operations.

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Section 07: POS Module: Navigation

The POS Module contains tools, reports, and settings relating to point of sale operations. The **POS > Maintenance** section contains the configurations related to those operations.



- **Discounts** and **Discount Groups** can be configured here. Create your discount groups before creating the discounts that will apply to them.
- The **Doctors** section holds profile information for referring doctors.
- **Purchase Limits** control how much cannabis product your customers are able to purchase.
- **Pricing** enables the creation of **Pricing Tiers**.
- Basic register setup is housed under **Registers**.
- If you accept returns, you can set a list of reasons under **Return Reasons**.
- Cancellation Reasons can be applied whenever an order is cancelled (see Section 9).
- You can also set specific **Transaction Adjustment Reasons**. These will be applied when making adjustments to **Register Transaction Histories** (see Section 8).

This manual also reviews the **Layout** section - this section manages **customer status** setup - you can set colors, names, Kanban order, and default status behaviors here.

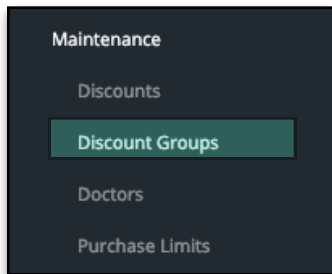
The **Terminal** link is used to access the **POS terminal** through the backend. This will open a new tab in your browser.

Section 07: POS Maintenance: Discounts

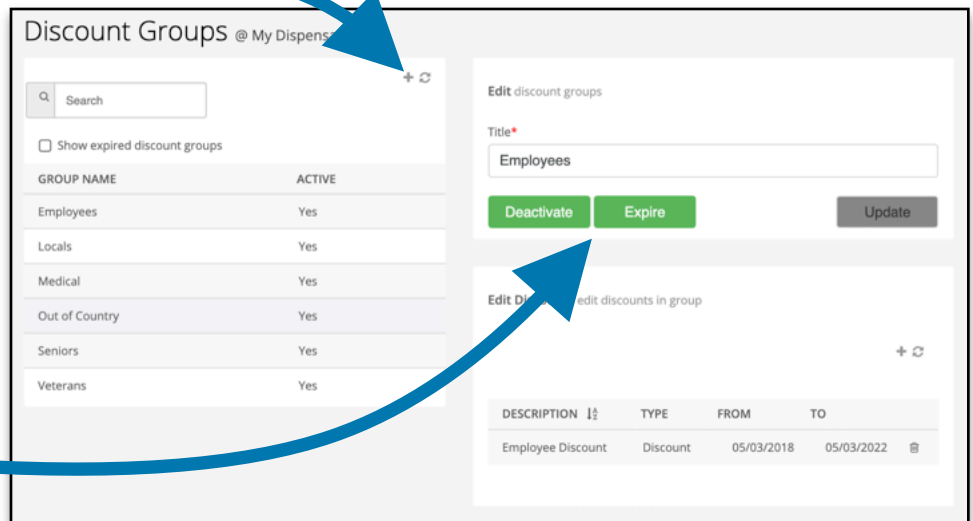
LeafLogix has a robust discounting system. Discounts can be applied **automatically** or **manually**, to customer **Discount Groups** and to individual or sets of **Products**. Additionally, discounts can be set to apply only on specific days and times (happy hours and daily deals). They can also be linked to **Codes** applied at the POS.

Automatic Discounts apply whenever their rules apply. By default, LeafLogix will choose the best discount in the event of conflict. **Manual** discounts are applied at the discretion of the terminal operator and can be set to require manager approval. Discount settings are shared across organizations.

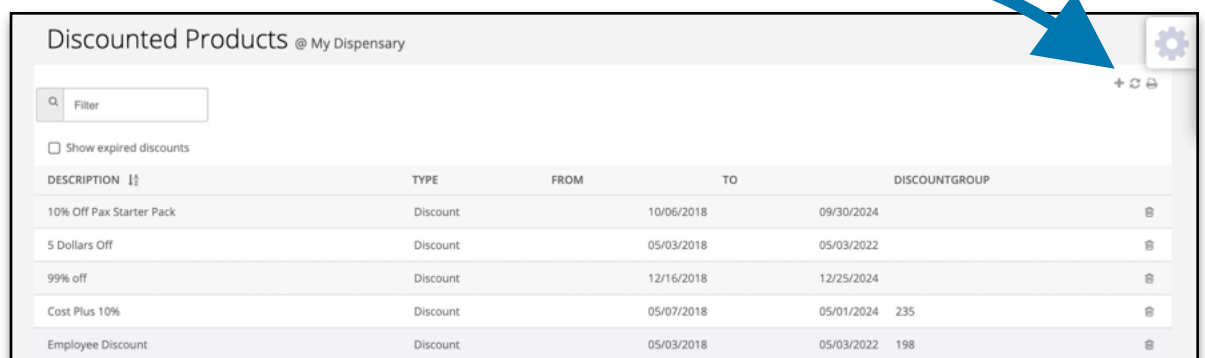
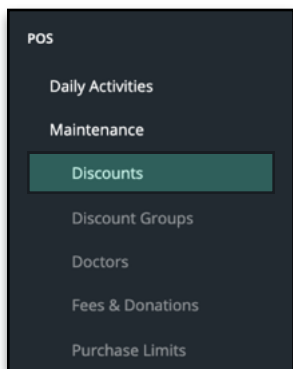
Before creating discounts, set up your **Discount groups** from **POS > Maintenance > Discount Groups**. Simply type in the name of the new group and click **Update**.



Once your groups are created and associated with a **Discount**, these associations can be managed from the Edit Discounts box. You can also **Deactivate** or **Expire** (delete) discount groups from here.

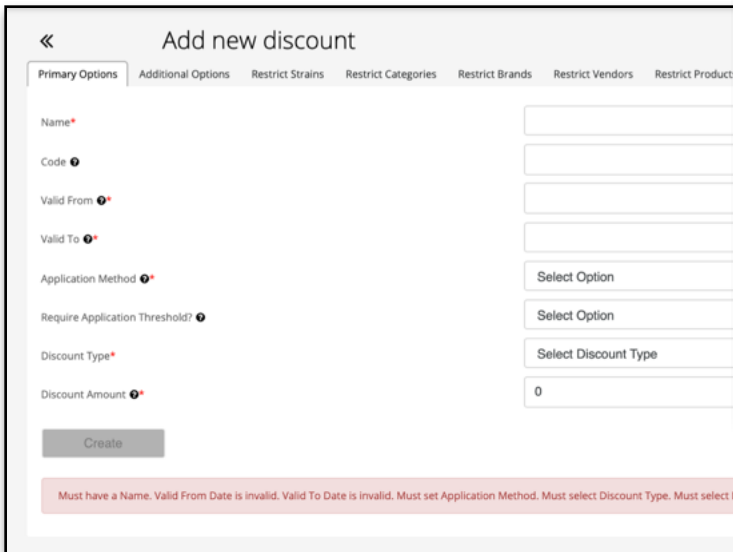


Once your groups are added, create a **new discount** by clicking on the "+" on the **Discounts Page** (POS > Maintenance > Discounts). In order to modify an existing discount, select it and you'll be taken to its details.



Section 07: POS Maintenance: Discounts

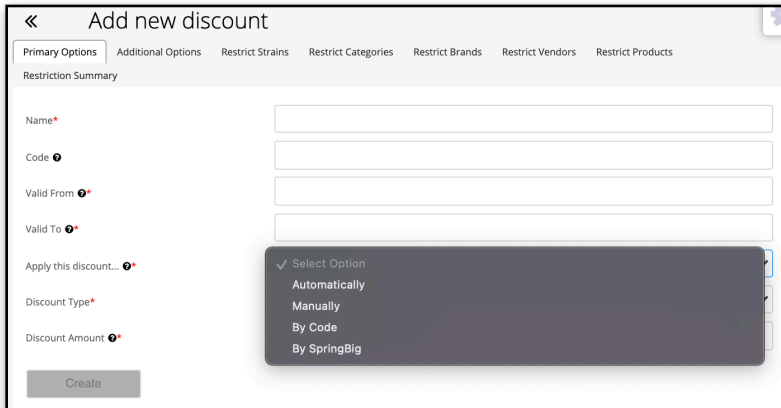
To add a **new discount**:



Start by defining your primary options. **Name** your discount something distinct and easy to understand.

Codes can be encoded into barcodes and used to apply **manual discounts** at point of sale.

If you don't plan to expire a given discount, set the **Valid To** range well into the future.



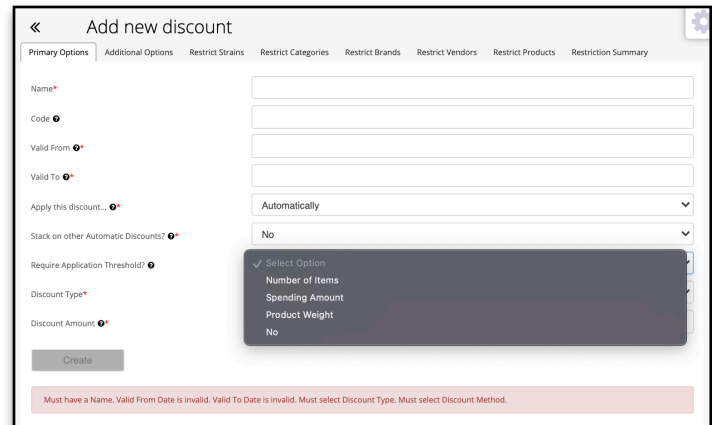
Next, select your **application method**. Both methods will respect any **restrictions** you set.

Manual discounts are applied at user or manager discretion.

Automatic discounts apply automatically, and can be set to stack.

By Code discounts are applied at the point of sale, either by scanning or keying in the code set here.

By Springbig connects LeafLogix's discounts to Springbig. Integrated systems only.



LeafLogix offers three **Application Threshold** options:

Multiple Item discounts require a customer to purchase more than one item.

Spending Amount discounts won't trigger until the cart **subtotal** passes a spending threshold.

Product Weight bases discount on the total weight or **Grams/Concentration** assigned to a package.

Section 07: POS Maintenance: Discounts

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors

Restrict Products | Restriction Summary

Name*

Code

Valid From

Valid To

Application Method

Stack on other Automatic Discounts?

Require Application Threshold?

Num

Items

Discount Type

- Mix and Match - Single Product
- Mix and Match - All Products
- Buy X Get 1 - Single Product
- Buy X Get 1 - All Products

Discount Method

Discount Amount

Create

As previously noted, LeafLogix has a robust discounting system. Plan your discounts ahead of time, and be sure to test them before deploying.

Set your **Discount Type**:

Mix and Match - Single Product This discount will ONLY be applied if the appropriate count of the same **Product** (by **SKU**) are in the cart.

Mix and Match - All Products applies the discount evenly across all applicable Products (SKUs) added to a cart - i.e, joint specials that include multiple strains.

Buy X Get 1 - Single Product applies the entire discount to a single product SKU; single SKU BOGOs

Buy X Get 1 - All Products applies the entire discount to a single product SKU; for mutli-SKU BOGOs

Remember to **Restrict Products** when creating multiple item discounts.

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | **Restrict Products**

Create

Restriction Type

Search

| SKU | PRODUCT NAME | TYPE | MASTER CATEGORY | CATEGORY | STRAIN | VENDOR | BRAND |
|-----------------------------------|--------------------|----------|-----------------|-----------------|------------|-------------|-------|
| <input type="checkbox"/> 150TEST | \$150 off test | Quantity | | | | | |
| <input type="checkbox"/> 15117494 | Special | Quantity | | | | | |
| <input type="checkbox"/> 93355181 | Death Star Eighth | Quantity | MMJ | PrePackaged Bud | | | |
| <input type="checkbox"/> 27307843 | Blue Dream - 1/8oz | Quantity | MMJ | PrePackaged Bud | Blue Dream | Test Vendor | |

Section 07: POS Maintenance: Discounts

Next, select the desired **Discount Method**:

The screenshot shows a web-based form for configuring a discount. The form is divided into several sections: 'Primary Options', 'Additional Options', 'Restrict Strains', 'Restrict Categories', 'Restrict Brands', 'Restrict Vendors', 'Restrict Products', and 'Restriction Summary'. The 'Primary Options' section includes fields for 'Name*', 'Code', 'Valid From', 'Valid To', 'Application Method' (a dropdown menu), 'Require Application Threshold?' (a dropdown menu), 'Discount Type' (a dropdown menu), 'Discount Method' (a dropdown menu), and 'Discount Amount'. The 'Discount Method' dropdown is currently open, showing a list of options: 'Select Discount Method', 'Percent Off Price', 'Amount Off Price', 'Price To Cost Plus Percent', and 'Price To Amount'. The 'Create' button is located at the bottom left of the form.

Percent Off Price lowers the price by a given percentage amount. It can be assigned to a group or to specific products.

The **Amount Off Price** method takes a fixed dollar value off of items added to the cart. It can be assigned to a group or to specific products.

Price to Cost Plus Percent looks at the unit cost assigned to a package of items and adds a percentage to this value to determine price. It can be assigned to a group or to specific products.

Similarly, you can assign a **Price To Amount** discount, and reduce the price of an item or items to a set level.

Once you have completed your selections, navigate to the **Additional Options**.

Section 07: POS Maintenance: Discounts

1 Weekly Recurrence Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

2 Is Available Online? No

3 Loyalty Points to Redeem

4 Restrict To Location

5 Include Non-cannabis Items Yes

6 Restrict to Group(s)

7 Limit Uses

8 First Time Customer Only?

Create

Set other **Restrictions** as required...

Discount Configuration

Save and Refresh

You may have unsaved restrictions, this is a preview and will not take effect until you save.

| SKU | NAME | STRAIN | CATEGORY | BRAND | VENDOR |
|----------|----------------------|------------|----------|-------|-----------|
| 69532879 | Death Star Pre-Rolls | Death Star | joints | | |
| 71716864 | Blue Dream joints | Blue Dream | joints | | JimmyTech |

- 1 Discounts don't need to be set up to recur - only set the **Weekly Recurrence** if you want to limit which days your discount can be accessed.
- 2 Discounts can cost **Loyalty Points**, set up under **Maintenance > Loyalty**.
- 3 By default, discounts can be used at all locations - you can **Restrict To Location** as required.
- 4 Only **Manual Discounts** can be set to **Require Manager Approval**.
- 5 Non-cannabis items include **Product Masters** with the **Cannabis Product** flag set to no.
- 6 By default, discounts apply to all customers - you can **Restrict To Groups** as required.
- 7 **Application Limits** will tally over the life of the discount. *They apply to individual cart line items, not transactions.*
- 8 **First Time Customers** are those with no previous transaction history.

When you finish your discount, navigate to the **Restriction Summary** page to verify your settings. When you're done, **Save and Refresh!**

Section 07: POS Maintenance: Sample Discounts

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* Gummy Bogo\$1

Code

Valid From* 07/19/2019 12:00 PM

Valid To* 07/31/2024 12:00 PM

Application Method* Automatic

Stack on other Automatic Discounts? No

Require Application Threshold? Multiple Items

Num Items 2

Discount Type* Buy X Get 1 - All Products

Discount Method* Price To Amount

Discount Amount* 1

Update

Sample: Buy one, get one for a dollar. Don't forget to assign Products from under the **Restrict Products** tab.

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Update

Restriction Type

Restrict To

Gummies

| SKU | PRODUCT NAME | TYPE | MASTER CATEGORY | CATEGORY | STRAIN | VENDOR | BRAND |
|----------|----------------|----------|-----------------|----------|--------|--------|-------|
| 90706510 | Mixed Gummies | Quantity | Edibles | Gummies | | | |
| 52209261 | Lime Gummies | Quantity | Edibles | Gummies | | | |
| 25789676 | Cherry Gummies | Quantity | Edibles | Gummies | | | |

Sample: Manager's 99% off special. Note that this discount is applied manually, and requires manager's approval.

Require Manager Approval Yes

Include Non-cannabis Items Yes

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* 99% off

Code

Valid From* 12/16/2018 10:00 PM

Valid To* 12/25/2024 10:00 PM

Application Method* Manual

Require Application Threshold? No

Discount Type* Percent Off Price

Percent Amount* 99

Update

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* Veterans 10%

Code

Valid From* 04/30/2018 10:00 PM

Valid To* 04/30/2021 10:00 PM

Application Method* Automatic

Stack on other Automatic Discounts? No

Require Application Threshold? No

Discount Type* Percent Off Price

Percent Amount* 10

Update

Sample: Veteran's 10% off. Applies only to customers assigned to the Veterans Group.

Restrict to Group(s)

Limit Uses

First Time Customer Only?

Discount Id

Update

Search...

- No Group Assigned
- Employees
- Locals
- Medical
- Out of Country
- Seniors
- Special Group
- Veterans

Select All Select None

Section 07: POS Maintenance: Sample Discounts

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* Code Discount
Code 1111
Valid From 11/01/2019 12:00 PM
Valid To 11/01/2028 12:00 PM
Apply this discount... By Code
Require Application Threshold? No
Discount Type* Amount Off Price
Discount Amount 15

Update

Sample: Discount by code. The code value entered into the Code box can be typed or scanned into the POS, under the **Discount (%) Tab**.

1111 | Apply

Applied Discounts

Description
Blue Dream - 1/8oz
00345

Tip! **Discount Codes** can be printed as **standard bar** or **QR codes**.

« Add new label

Name* Sample Discount Code | Width per Label* 2
Type* Package | Height per Label* 1
Orientation* Portrait | Labels per Sheet* 1
DPI* 203

Save

Field* free
Value
X Position*
Y Position*
Width*
Height*
Font Size*
Rotation

Update

Begin by setting up a label for your discount. Add a new field, and search for **Free Text**. Then choose either **Free Text Barcode** or **Free Text QR Code**, and enter the discount's **Code** in the the **Value** field below. Each discount will need it's own label.

« Add new label

Name* Sample Discount Code | Width per Label* 2
Type* Package | Height per Label* 1
Orientation* Portrait | Labels per Sheet* 1
DPI* 203

Save | Preview | Print

Fields

| DATA FIELD | VALUE | FONT SIZE | X | Y | WIDTH | HEIGHT | ROTATION |
|----------------|-------|-----------|-----|-----|-------|--------|----------|
| Free Text Code | 1111 | 12 | 0.1 | 0.1 | 1 | 1 | |

You can print your new label directly from the Label details screen.

Section 07: POS Maintenance: Sample Discounts

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* Buy 1 3.5 Get 10%

Code

Valid From 09/30/2018 10:00 PM

Valid To 09/30/2024 10:00 PM

Apply this discount... Automatically

Stack on other Automatic Discounts? No

Require Application Threshold? Number of Items

Num Items 2

Discount Type Buy X Get 1 - Single Product

Discount Method Percent Off Price

Percent Amount 10

Update

Sample: Buy one, get one for 10% off. When a customer buys 2, they get 10% off the second item, 10% off the fourth, then the sixth, and so on.

Don't forget your product restrictions!

Discount Code Apply

Applied Discounts

- Buy an 1/8th \$13.65
- Remove all
- Headband - 1/Boz 00387 \$ 4.55 x
- Headband - 1/Boz 00387 \$ 4.55 x
- Headband - 1/Boz 00387 \$ 4.55 x

| Description | Weight | Discount | Price | Qty |
|------------------------|--------|----------|----------|-----|
| Headband - 1/Boz 00387 | 2lb | \$13.65 | \$273.00 | 6 |

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Update

Restriction Type Restrict To

1/8

| SKU | PRODUCT NAME | TYPE | MASTER CATEGORY | CATEGORY | STRAIN | VENDOR | BRAND |
|-------------------------------------|-----------------------------|----------|-----------------|-----------------|--------------|-------------|---------|
| <input checked="" type="checkbox"/> | 27307843 Blue Dream - 1/Boz | Quantity | MMJ | PrePackaged Bud | Blue Dream | Test Vendor | |
| <input checked="" type="checkbox"/> | 85934237 Gorilla Glue 1/8th | Quantity | MMJ | PrePackaged Bud | Gorilla Glue | JimmyTech | |
| <input checked="" type="checkbox"/> | 23625347 Headband - 1/Boz | Quantity | MMJ | PrePackaged Bud | Headband | Test Vendor | Branded |
| <input checked="" type="checkbox"/> | TV0001 Jack Herer - 1/Boz | Quantity | MMJ | PrePackaged Bud | Jack Herer | Test Vendor | |

Sample: Buy 5 for \$40. When a customer buys 5, each item will be reduced to ten - note the **Price to Amount** setting - this overrides the base price for the product, allowing the total number of units to add up to the desired subtotal - $5 * \$8$, or \$40.

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* Buy 5 Js for 40

Code

Valid From 03/02/2021 12:00 PM

Valid To 03/18/2031 12:00 PM

Apply this discount... Automatically

Stack on other Automatic Discounts? No

Require Application Threshold? Number of Items

Min Items 5 Max Items 5

Discount Type Mix and Match - All Products

Discount Method Price To Amount

Discount Amount 8

Update

Section 07: POS Maintenance: Sample Discounts

Sample: Product Weight discount - buy 10 grams (by **grams/concentration**) of product, get 10% off. Volume discounts like this are commonly restricted by category (flower or concentrate). If you wish to create a Product Weight discount for **edibles**, remember that most edibles are weighed in milligrams - adjust the **Num Grams** filed accordingly. Product Weight discounts can also be applied alongside **Pricing Tiers**.

Discount Configuration

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* 10% off 10 Grams

Code

Valid From* 04/16/2021 12:00 PM

Valid To* 04/01/2031 12:00 PM

Apply this discount...* Automatically

Stack on other Automatic Discounts?* No

Require Application Threshold? Product Weight

Num Grams* 10

Discount Type* Mix and Match - All Products

Discount Method* Percent Off Price

Percent Amount* 10

Update

Add new discount

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Name* 20% Joint Special

Code

Valid From* 04/25/2021 12:00 PM

Valid To* 05/31/2021 12:00 PM

Apply this discount...* Automatically

Stack on other Automatic Discounts?* No

Require Application Threshold? Number of Items

Min Items 1 Max Items 1

Discount Type* Mix and Match - Single Product

Discount Method* Percent Off Price

Percent Amount* 20

Create

Sample: Buy one for 20% off - this discount will take 20% off a single item one time (per customer). Note the **Limit Uses** setting - this will prevent the discount from being applied to the same customer more than once. If you wish such a discount to work with other specials, don't forget to enable stacking.

Add new discount

Primary Options | Additional Options | Restrict Strains | Restrict Categories | Restrict Brands | Restrict Vendors | Restrict Products | Restriction Summary

Weekly Recurrence

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

Is Available Online? No

Loyalty Points to Redeem

Restrict To Location Select Location

Include Non-cannabis Items Yes

Restrict to Group(s) Select Group(s)

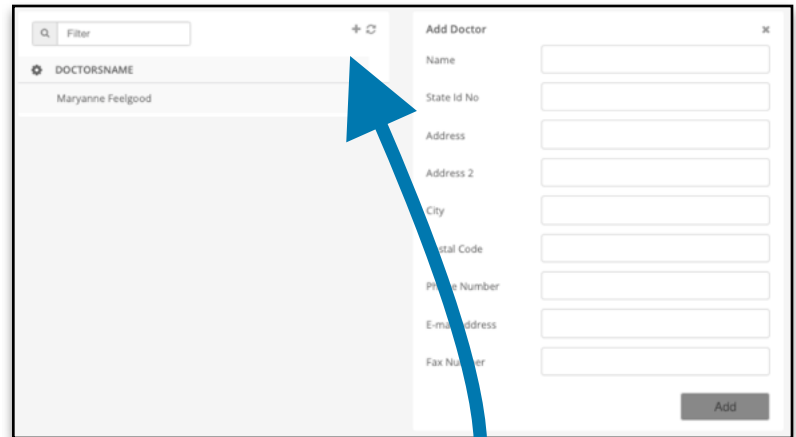
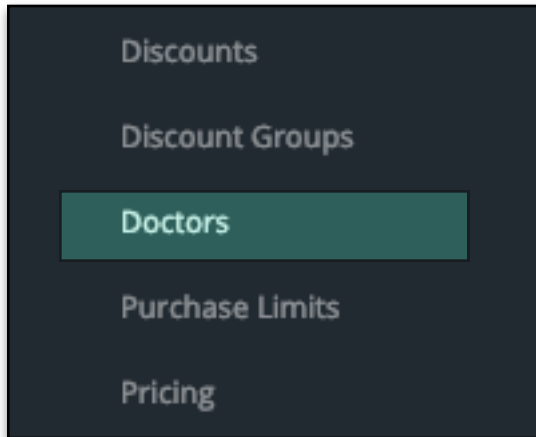
Limit Uses 1

First Time Customer Only? Select Option

Create

Section 07: POS Maintenance: Doctors

LeafLogix allows for the maintenance of referring **doctor profiles**. Navigate to the Doctor page, and select the “+” at the top right of the table to open a new record. Once created, doctors can be associated with customer profiles built at the point of sale.



The 'Add Doctor' form includes a search filter, a table with one entry 'Maryanne Feelgood', and a form with fields for Name, State Id No, Address, Address 2, City, Postal Code, Phone Number, E-mail Address, and Fax Number. An 'Add' button is at the bottom right.

Doctors added here...

...are linked to POS customer profiles on a customer's **medical info** tab.



Customer Info: Mahah Recreational
Created on 07/04/2018

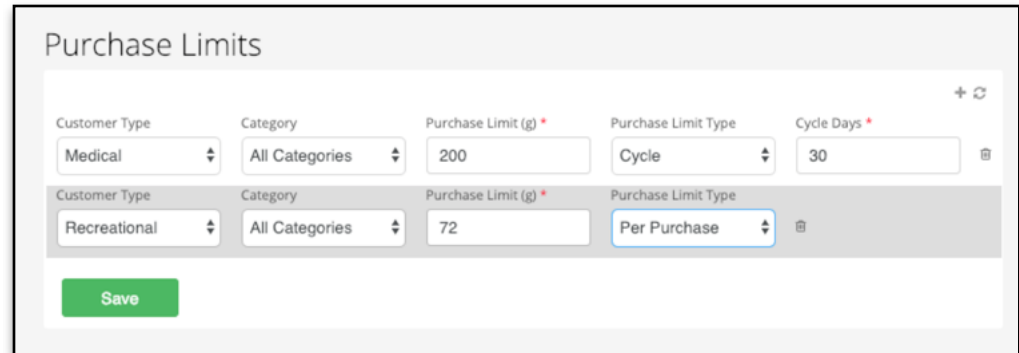
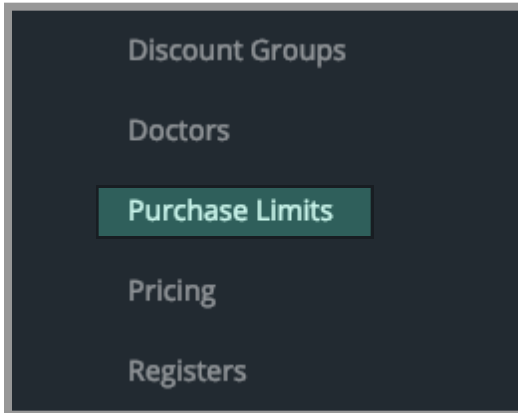
Personal
Medical
History
Journal

Doctor
Doctor's Name
Maryanne Feelgood

Primary Caregiver

Section 07: POS Maintenance: Purchase Limits

Purchase Limits are set up in order to help you prevent overselling at the point of sale. Limits can be set for different customer types and against different purchase limit categories. Purchase limit categories are pre-set, and will be applied to Product Categories. The available customer types mapped to the Customer Type under the customer section of the maintenance module.

A screenshot of the 'Purchase Limits' configuration interface. It features two rows of input fields. The first row is for 'Medical' customer type, 'All Categories', a limit of '200', 'Cycle' limit type, and '30' cycle days. The second row is for 'Recreational' customer type, 'All Categories', a limit of '72', and 'Per Purchase' limit type. A green 'Save' button is located at the bottom left of the form area.

The **Customer Type** options are set under **Maintenance > Customers**. Limits are only applied at the POS terminal.

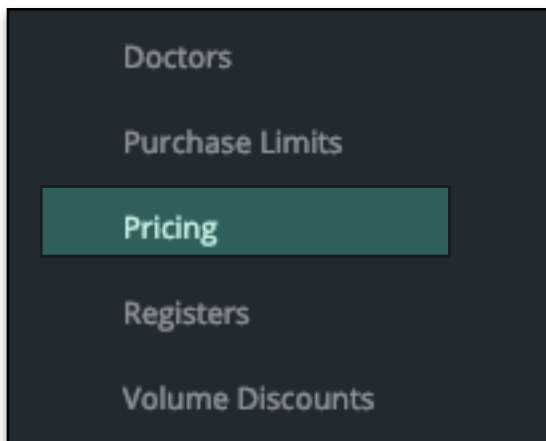
There are four **Purchase Limit Categories**: Flower, Concentrates, Edibles, and Infused non-edibles. Be sure that your **product categories** are associated with the correct ones!

The **Purchase Limit Type** can accommodate a cycle (beginning on the day they came in), a 24 hour period, or a calendar day.

Section 07: POS Maintenance: Pricing

Because many marijuana products are sold on the basis on **weight**, LeafLogix's tiered pricing system will allow the **per-gram price** to be adjusted as the quantity purchased goes up. Once created, pricing tiers are applied to **Product Masters**.

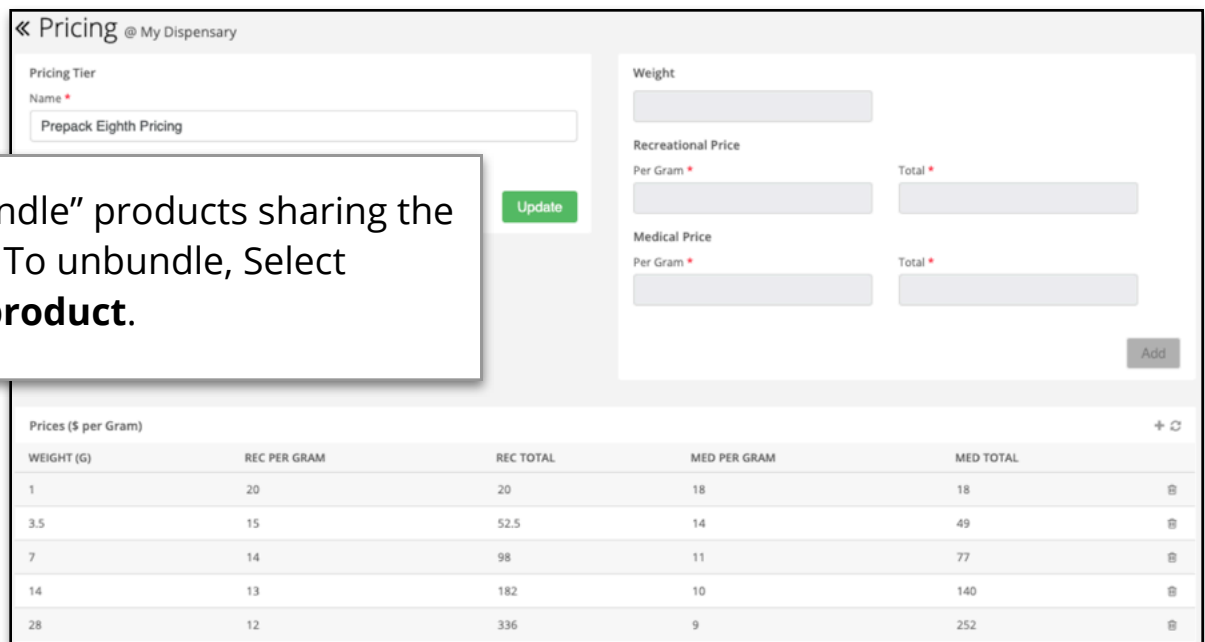
They can be used on weight-based and quantity-based products alike. Quantity-based products will be added together on the basis of the package's **Grams/Concentration**.



Create a new tier by clicking the “+” on the Pricing table. This will open the Pricing window for the new tier. To modify an existing pricing tier, simply click on the record.

Click the “+” to create a new price point. You can set pricing by the gram, or by the total price you'd like customers to pay for a given amount. Note that you can set different pricing tiers for medical and recreational patient types.

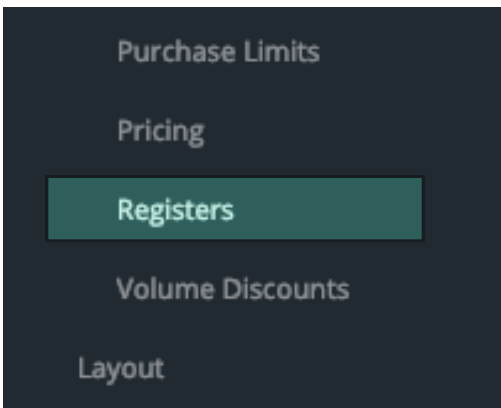
LeafLogix will “bundle” products sharing the same pricing tier. To unbundle, Select **Pricing tier per product**.

The screenshot shows the 'Pricing @ My Dispensary' interface. It includes a form for creating a pricing tier with a 'Name' field containing 'Prepack Eighth Pricing' and an 'Update' button. Below the form are input fields for 'Weight', 'Recreational Price' (Per Gram and Total), and 'Medical Price' (Per Gram and Total), along with an 'Add' button. At the bottom, there is a table titled 'Prices (\$ per Gram)' with columns for WEIGHT (G), REC PER GRAM, REC TOTAL, MED PER GRAM, and MED TOTAL. The table contains five rows of data for different weights and their corresponding prices for recreational and medical use.

| WEIGHT (G) | REC PER GRAM | REC TOTAL | MED PER GRAM | MED TOTAL |
|------------|--------------|-----------|--------------|-----------|
| 1 | 20 | 20 | 18 | 18 |
| 3.5 | 15 | 52.5 | 14 | 49 |
| 7 | 14 | 98 | 11 | 77 |
| 14 | 13 | 182 | 10 | 140 |
| 28 | 12 | 336 | 9 | 252 |

Section 07: POS Maintenance: Registers

Registers represent the physical cash registers or register drawers within your dispensary. The register controls will also set the default behavior for certain functions inside the POS terminal itself.



Register settings drive behavior at the POS - if you need to reselect printers or labels from the POS screen, double check the defaults here.

The Register Table will list all of the registers in a given facility.

| Registers at Hallman (D) | | | |
|--------------------------|--------------------|----------------------|-------------|
| NAME | AUTO PRINT LABELS? | AUTO PRINT RECEIPTS? | SHOW NOTES? |
| Register 1 | No | No | Yes |
| Register 2 | No | No | Yes |
| Register 3 | No | No | Yes |

Registers can control selections for default labels, label printers, and receipt printers for budtenders assigned to them.

If set to "yes", this toggle allows the **note** entered under the **medical info** tab on the customer profile to pop up when that customer is selected into a cart.

Note the **default printer** settings. These options are set under **Maintenance > Printers**.

Registers @ Hallman (D)

Settings

Register Name *

Show notes when entering POS

Auto print labels

Default label printer

Auto print receipts

Default receipt printer

Default label

Update

Section 07: POS Maintenance: Return Reasons

- Purchase Limits
- Pricing
- Registers
- Return Reasons**
- Layout
- Terminal
- E-Commerce

There's lots of reasons why your customers might want to return things, Why not record the why?

| REASON | |
|----------|--|
| Rejected | |
| Broken | |

Add new

ADD

reasons added here...

...are linked to POS return reasons on a customer's **history** tab.

Return Product

Cash Returned

NO YES

Returned to inventory

NO YES

Return Reason

✓ Select Return Reason

Rejected

Broken

Section 07: POS Maintenance: Transaction Adjustment Reasons

Purchase Limits

Pricing

Registers

Return Reasons

Transaction Adjustment
Reasons

Transaction Adjustment Reasons are used when adjusting drawers. LeafLogix also allows users to enter a freeform comment.

The screenshot shows a web interface for managing Transaction Adjustment Reasons. On the left, there is a table with the following rows:

| REASON | |
|-----------------|--|
| Petty Cash | |
| Void Adjustment | |

On the right, there is an 'Add new' section with a text input field containing 'Incorrect Change' and a green 'ADD' button. A blue arrow points from the text 'reaons added here...' to the 'ADD' button.

reaons added here...

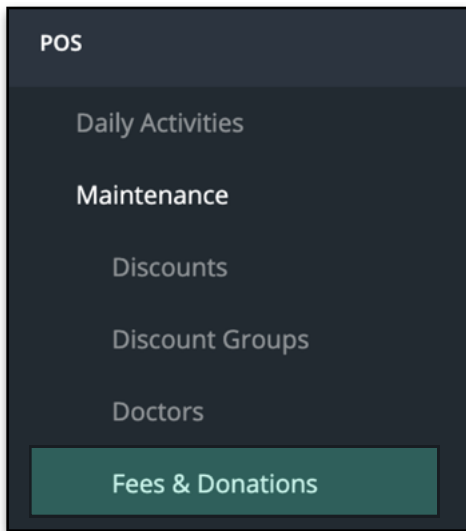
...are linked to POS transaction adjustment reasons on a register's **transaction management** tab.

The screenshot shows a 'Withdraw' dialog box with the following fields:

- Amount: 0
- Reason: A dropdown menu is open, showing 'Petty Cash' (with a checkmark) and 'Void Adjustment'.
- Comment: (empty)

A 'Withdraw' button is at the bottom left. A blue arrow points from the text '...are linked to POS transaction adjustment reasons on a register's transaction management tab.' to the Reason dropdown menu.

Section 07: POS Maintenance: Fees and Donations



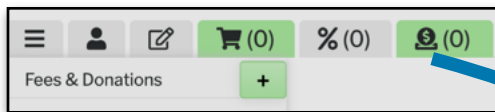
LeafLogix allows users to create **fees** and or **donations** that can be applied to new orders at the point of sale.

In order to create a fee, enter the **name** and the **calculation value** (the amount of the fee/donation).

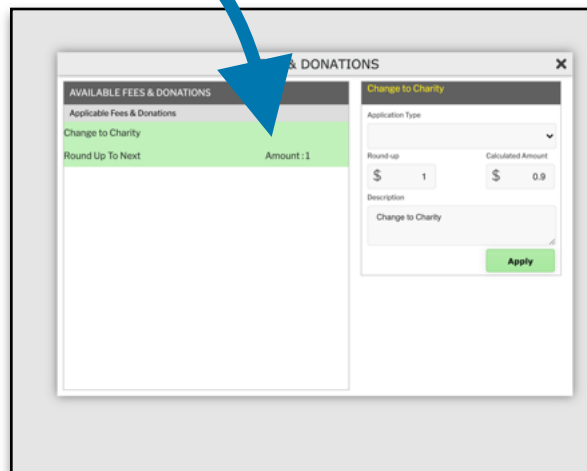
Next, select the **calculation method** dropdown. You can chose to set a fee/donation to a **flat amount**, a **percentage of the current cart subtotal**, or to **round up to the next** value set in the calculation value field.

A screenshot of the 'Fee and Donation Configuration' form. The form has the following fields: Name* (text input with 'Change to Charity'), Calculation Method* (dropdown menu with 'Round Up To Next'), Calculation Value* (text input with '1'), Is Revenue?* (dropdown menu with 'No'), and Is Active?* (dropdown menu with 'Yes'). There are 'Cancel' and 'Update' buttons at the bottom.

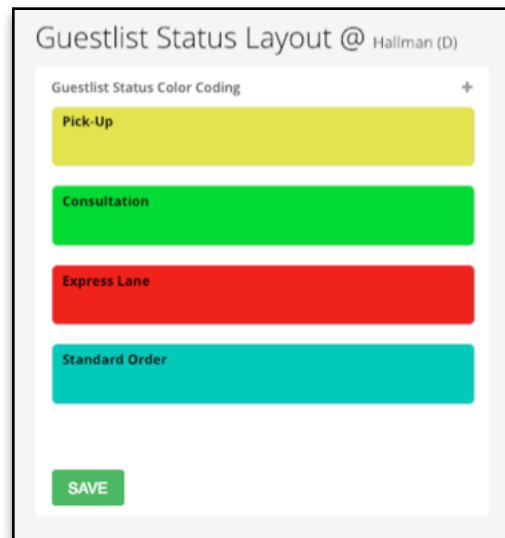
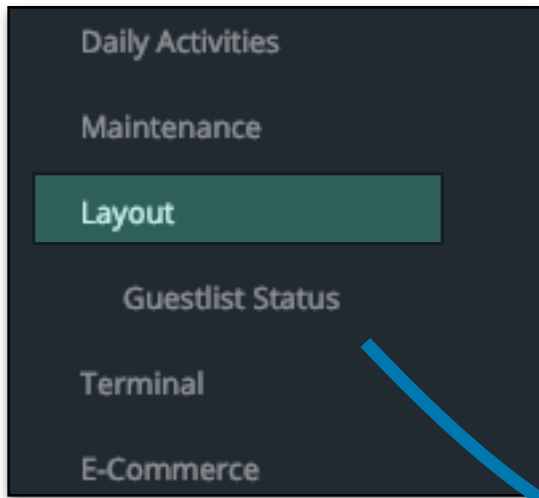
Fees are considered **revenue**, and are taxable. Donations are not taxed, so are not considered revenue.



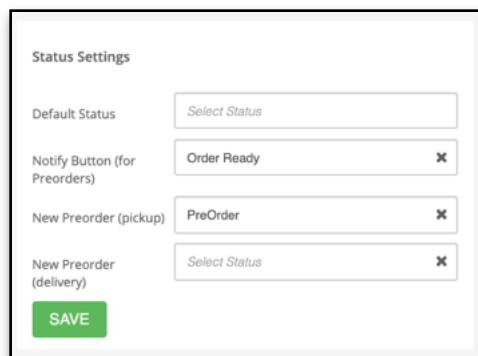
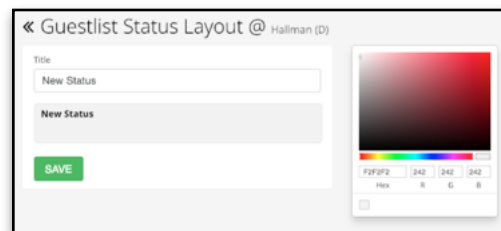
Once you have created you fee/ donation, you can add it to a customer cart by click on the **Fee/Donations** tab immediately to the right of the **discount tab**.



Layout > Guestlist Status settings are used to organize customers in the POS guestlist. Their order here also will determine the order of your **Kanban lanes** - top to bottom maps from left to right.



Create a new status by clicking the "+". Then give it a name, and select a color. Notice that there are two color sliders - one inside the box, and one below.



Once you have built your statuses, you can set default conditions. The **default status** will be the initial status all new customers will be assigned - it is not required. If you are integrated with an online ordering system, you will map your **preorder status** here. If you wish to set a status for preorder notifications (eg. ready for pickup), those can be selected here as well.

Section 07: POS: Layout

Configure your statuses carefully - they will become an important part of daily operations. There are two primary ways to reflect your store operations in LeafLogix. The **walk-in model** and the **preorder model**. In the walk-in model, customers are greeted and checked in by reception staff, and then their order is processed by a budtender. In the preorder model, orders are either submitted through an online order integration or created by floor staff, before being fulfilled/packed out of sight of the customer.

Your dispensary may utilize one or both of these workflows.

Gueslist Status Mapping Available

Guestlist Status Mapping By Facility

Preorders submitted through LeafLogix API will be tagged as Delivery = yes/no. This will trigger status accordingly.

Once ad delivery order is packed, the manifest should be **Saved** in through the POS or Delivery Manager

Once an order is packed, meaning that packages have been assigned to a cart, the **Ready for Delivery** button will update connected integrations (METRC, Onfleet, etc).

The **Notify** button updates the status of the order through the endpoint. Integrators can read this information, and trigger automated messaging.

If drivers are closing transactions on the road, consider using the **LeafLogix Curbside App** to complete transactions.

Completing transactions will also complete Ofleet Tasks created when clicking **Ready for Delivery**.

