

Birchmount Integrated Gift Card Guide

Managing Gift Card Inventory

[Video of Birchmount Gift Card Inventory Management](#)

1. Adding Gift Card Category

- Click on the **Products** tab and select **Configure** on the left side rail.
- On the **Category tab**, click the **Add Category** button on the right side of the page.
- Create a **category** for gift cards, ensuring it's available to **all customer types**.
- Leave **tax categories** blank as gift cards are not taxable at time of sale.
 - i. We advise each dispensary to consult their own counsel to advise on how they set up items as taxable as it relates to revenue and taxes and the resulting implications.
- Click **Save**.

2. Vendor Setup

- Click on the **Vendor** section on the left side rail of the **Products** tab and select the **Add Vendor** button.
- Add **Birchmount gift cards** as a **vendor** with all zeros as the vendor code.
- Additional vendor information can be added for ease of inventory management.
- Click **Save**.

3. Creating Gift Card Products

- On the left side rail, click into the **Catalog** section.
- Click the **add product button** and name it (e.g., Birchmount gift card).
- Choose increments for sale (e.g., \$25, \$50, \$75) as they are not pre-loaded.
 - Ensure the increment amount is included in the naming convention.
- Choose the **Category** as “**gift card**”
- For **Type** and **Default Unit** select “**quantity**”
- Set **Cannabis Product** field to “**No**”
- Set the **Base Price** to match the gift card amount, **Vendor** as “**Birchmount gift cards**” and availability on the point of sale to “**yes**”.
- As a best practice, also mark the **Taxable** field to “**No**”.
 - We advise each dispensary to consult their own counsel to advise on how they set up items as taxable as it relates to revenue and taxes and the resulting implications.
- Determine low inventory thresholds for alerts if needed.
- If adding more products to the catalog for gift cards in different increments, save time with the below steps:
 - Search the catalog for your newly created gift card product and click into the product to see the details page.
 - In the right hand corner, click the **Actions** button and select **Copy** to create a copy of that catalog item.
 - Rename the copied product with the new gift card increment and ensure you update the **Base Price** field to the appropriate amount.
 - Click **Save** to save this new catalog item and repeat the copy method as needed.

4. Receiving Inventory

- Navigate to the **Inventory** section in the **Products** tab.
- Click the **Receive Inventory** button on the right side of the page to begin receiving.
- In the receiving details section, select the vendor, create an order title, assign a room for inventory to be received into.
- In the items received section, add items (e.g., \$25, \$50, \$75 gift cards) to the receiving manifest.
 - Select your product from the product catalog drop down (ex. Gift Card \$25)
 - Select the quantity you wish to assign to this catalog item (ex. Birchmount sent 200 gift cards, I will assign 100 to my \$25 value catalog item).
 - **Generate** the package ID and **Save Package**
 - Repeat for all items to be received.
- Once all items have been added, click the **Receive Inventory** button at the top right of the screen.

4. Checking Inventory

- You can return to the **Inventory** section to confirm all items have been categorized and received properly (check unit prices, product names and quantities).
- Ensure the full amount of physical cards has been received into inventory.

5. Testing at the Register

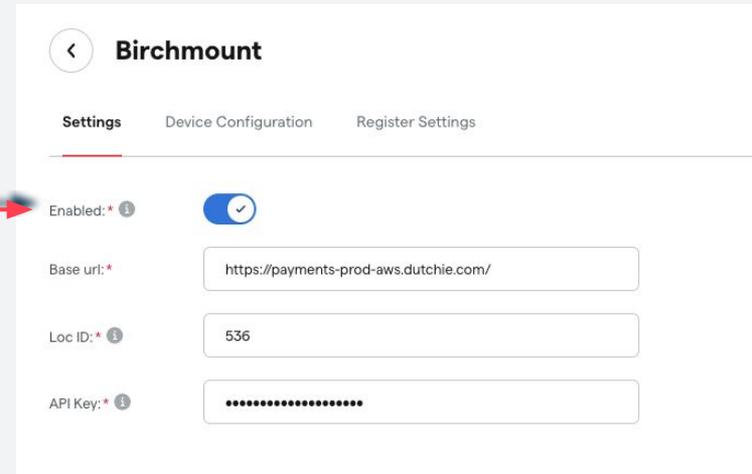
- Create an anonymous guest or use a test profile on the register and add a gift card to the cart (e.g., \$50 gift card).
- Verify no taxes apply for gift cards.
- Then double check tax application for other products.

7. Inventory Management

- If needed, your team can move allocated gift cards among the different catalog items you have created for gift card values.
- Example Scenario: I originally received 100qty into my catalog item “Gift Card \$25” and only 25qty into my catalog item “Gift Card \$75”. But now we have sold so many of the \$75 value cards, I need to move physical inventory over to replenish. I want to take 20qty of the “Gift Card \$25” product and convert it into “Gift Card \$75”.
 - On the **Inventory** screen, search for your gift card products.
 - **Check the box** next to the item you wish to convert and **click the three dots** on the right hand side of that item. (ex. Gift Card \$25)
 - Select **Convert**.
 - In the **Convert** window, select **the new product first** (ex. Gift Card \$75), then **enter the quantity** you wish to move.
 - **Generate the Package ID** and select the **room** if needed.
 - When ready, click **Convert** at the bottom right hand corner of the window.
 - You will see a new inventory line item with a new package ID for the quantity you have converted into the new product.
 - If desired, select the **checkboxes** of the two identical products with separate package IDs and use **Bulk Actions > Combine** to combine the two products for a clear view of your total inventory quantity for that item.
 - When combining, you can select the amount you wish to combine from each existing package ID for the products selected and then choose the package ID you wish them all to merge into.

Enabling Integration

- In Dutchie Back Office navigate to **Settings > Integrations > Birchmount > Settings tab** and toggle **enabled to on** and **save**
- All other settings have been configured for you and nothing else has to be done. Just refresh your POS so that all settings pull through and you can begin redeeming gift cards through the POS. Turning on the integration controls the Gift Card payment option appearing on your register.
- **Note:** If you previously had a gift card button enabled, you may now see two gift card buttons at checkout. To disable the non-integrated gift card button please go to: **settings > location >** and deselect **Check out gift card**
 - any issues please contact payments@dutchie.com



Processing a transaction

Transaction

- [Video walkthrough](#)

The screenshot displays a mobile POS interface. The top right corner shows the store name 'Happy Plant | Downtown Store', the register 'Register 1', and the cashier 'Bud T. Ender'. The main screen is split into two panels. The left panel shows the customer's profile for 'Penny Cooper' with contact information and a 'Cart 3' summary. The cart contains three items: 'Lemon Lavender | 6 pack' for \$40.00, 'Alien OG | 1g' for \$36.00 (with a 10% discount applied), and 'Chemistree | 1g' for \$40.00. The right panel is a 'Select payment type' screen with options for Cash, Dutchie Hub, Gift Card, and Manual. An 'ORDER TOTAL' of \$167.19 is displayed at the bottom of the right panel, with a 'Pay' button below it.

Happy Plant | Downtown Store | Register 1 | Bud T. Ender

Penny Cooper

09/16/1990 - 30 yrs | 248-379-9888 | S24243542412 - Exp 03/04/24 | 1231434324123 - Exp 03/04/24

Cart 3 | Order #: B0N65101010 | Ref: 1231412411241 | Edit

Delivery | Print | Print all labels | Add items

CANN
Lemon Lavender | 6 pack | 1 | \$40.00

CALIVA
Alien OG | 1g | 1 | \$40.00 | \$36.00 | Discount: 10% off

CALIVA
Chemistree | 1g | 1 | \$40.00

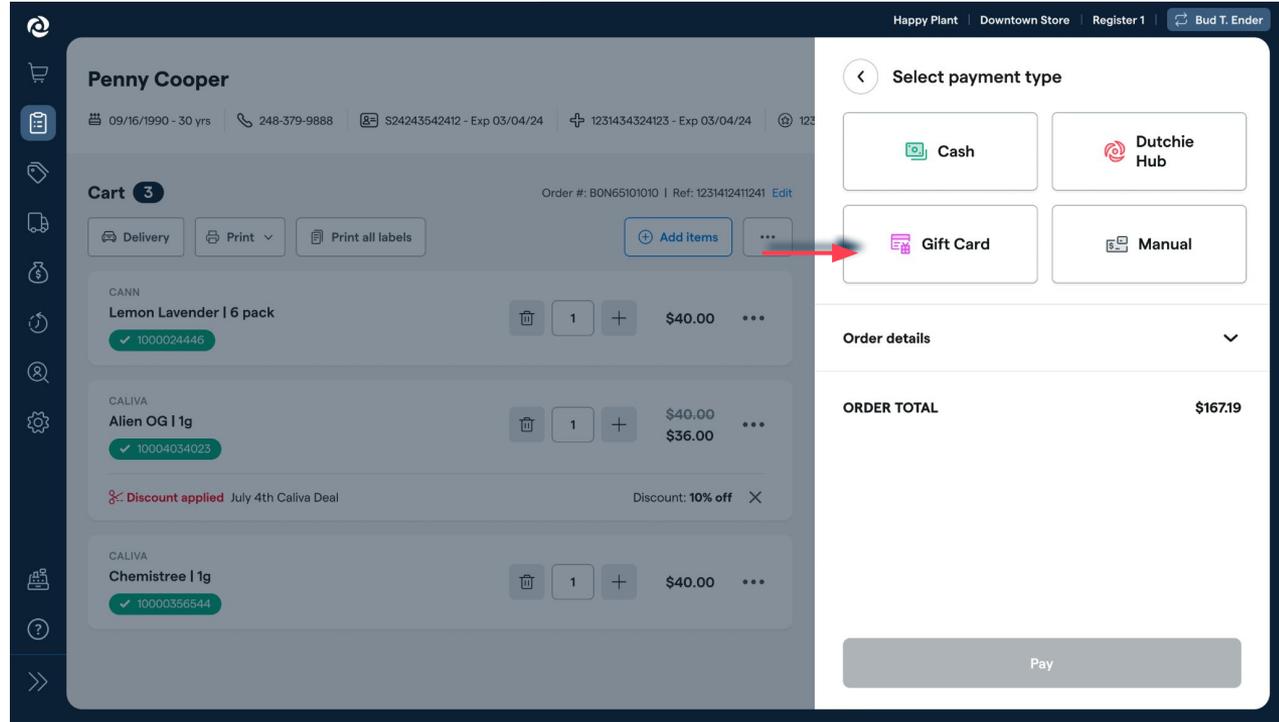
ORDER TOTAL \$167.19

Pay

Step 1

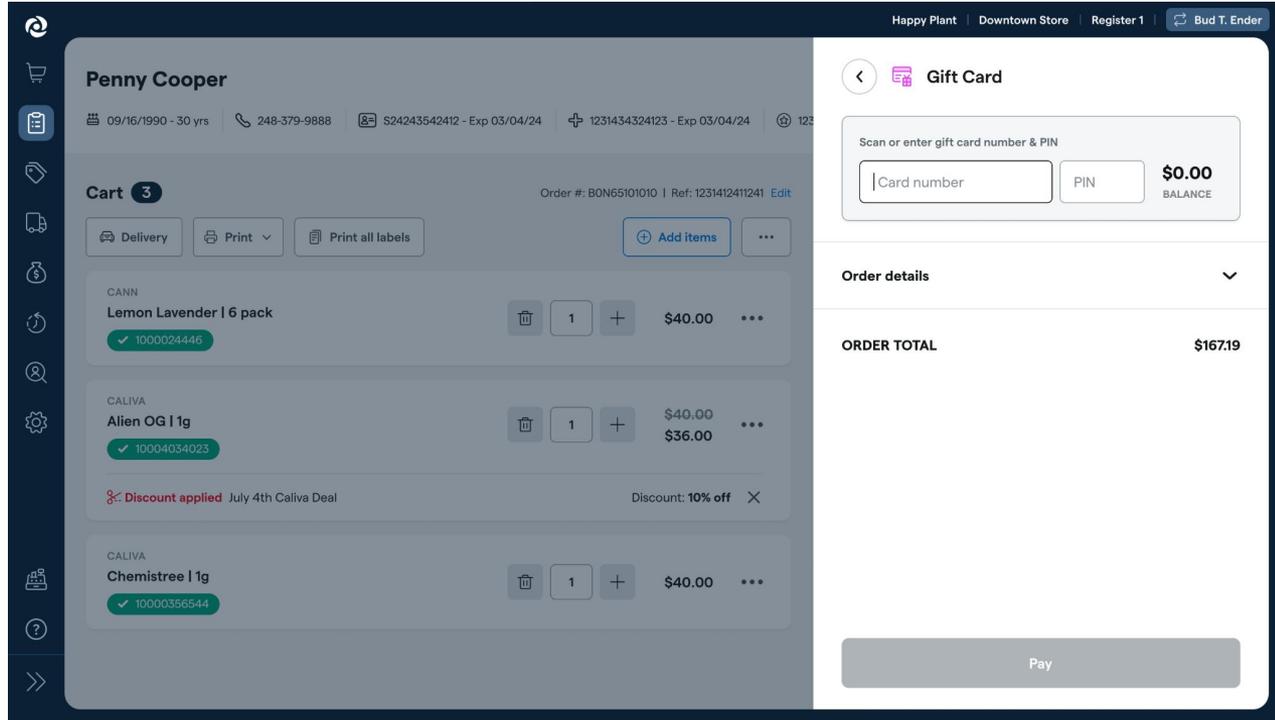
- The budtender is ready to checkout a customer in-store after helping them with the items they wish to purchase
- The budtender presents them with the payment options available and the budtender selects **Gift Card** as the tender type

Note: If your location requires an employee PIN at checkout, they will need to enter their employee PIN at the bottom of this Select Payment Type screen



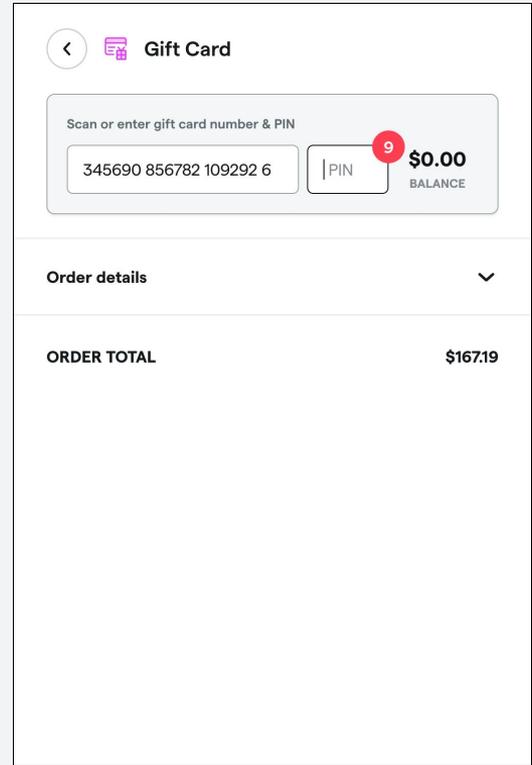
Step 2

- The budtender is then prompted to ask the customer to provide their pre-loaded gift card, so that they can scan or manually enter the number
- Split Payments: If your customer also wants to pay with cash or Pay by Bank in addition to card, select **Gift Card** payment first, then **Cash** or **Dutchie Hub**



Step 3

- The budtender then scans the barcode (or manually enters the 19 digit card number) from customer's gift card and manually enters the 4 digit PIN#



Step 4

- Once all info is entered, the balance on the card should appear next to the form fields.
- **If the order is less than the balance of the gift card** the order total will default in the gift card value field.
- **If the order is more than the value of the gift card**, the total balance of the gift card will load by default. This field is editable. Once the field displays the appropriate amount select **Apply Gift Card**
- **Note:** if the customer would like to add items to their order, the budtender can select the back arrow at the top of the screen. This can only be done before selecting Apply Gift Card.

Gift Card

Scan or enter gift card number

345690 856782 109292 6 1234 **\$20.00**
BALANCE

\$ 20.00

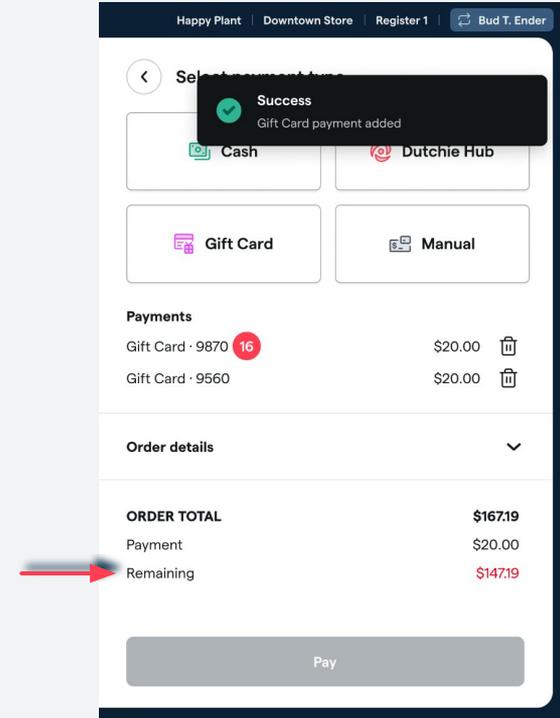
Apply gift card

Order details ▾

ORDER TOTAL \$167.19

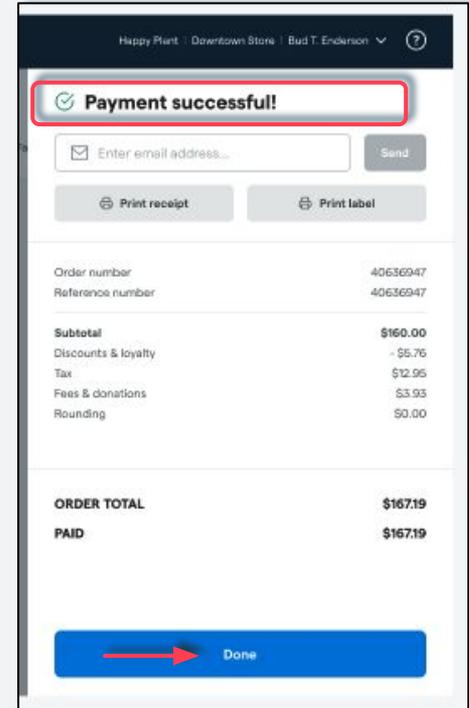
Step 5

- Once the value of the gift card is applied, the budtender should see a confirmation toast message and the amount applied is shown in the payment section.
 - Multiple gift cards can be applied to the same order
- If the gift card(s) value does not cover the order total, the amount still due will appear as the remaining amount under order details
 - From there select one of the other payment options above, e.g. cash or Dutchie Hub



Step 6

- Once all payment methods have been applied so there is no remaining balance the buttender will select **Pay**.
- Upon clicking on **Pay**, the buttender will see the payment success screen if the order was successfully finalized. Then will select **Done** to complete the order.



Reporting

Closing Report

- Total of redeemed gift cards will display on the closing report under **Payment Summary > Gift Card**

Payment summary	
Cash:	\$31,622.25
Pre-Payments:	\$60.25
Check:	\$61,158.75
Gift Card:	\$14,276.25
Total Payments:	\$107,117.50

Payments Report

- The Payments Report will allow you to see the details at the order level. You can run the report for a given date range, then filter by either column **Payment Method** = Gift Card or Split or column **Gift Paid** ≠ \$0.00

Payments

Report: Payments All locations 12/02/2024 - 12/09/2024 Actions Run

Payments

This report shows a summary of customer transaction details, specifically including payment details. Use this report to see detailed customers sale data.

STATE ID	TOTAL CHARGES	TOTAL DISCOUNT	TOTAL TAX	LOYALTY	AMOUNT	PAYMENT METHOD	CASH PAID	DEBIT PAID	CREDIT PAID	CHECK PAID	E PAID	GIFT ...	MAP PAID	PF	⚙
828		\$82.80	96.88	0	\$847.00	GiftCard	\$0.00	\$0.00	\$0.00	\$0.00	0	\$847.00	\$0.00	0	
610		\$0.00	79.3	0	\$694.25	GiftCard	\$0.00	\$0.00	\$0.00	\$0.00	0	\$694.25	\$0.00	0	
600		\$0.00	78	0	\$683.00	GiftCard	\$0.00	\$0.00	\$0.00	\$0.00	0	\$683.00	\$0.00	0	
510		\$0.00	66.3	0	\$581.25	GiftCard	\$0.00	\$0.00	\$0.00	\$0.00	0	\$581.25	\$0.00	0	
492		\$0.00	63.96	0	\$560.75	GiftCard	\$0.00	\$0.00	\$0.00	\$0.00	0	\$560.75	\$0.00	0	
479		\$0.00	62.27	0	\$546.25	GiftCard	\$0.00	\$0.00	\$0.00	\$0.00	0	\$546.25	\$0.00	0	

Note: Both reports can be used for reconciliation, just be sure to update the date range to coincide with the transaction dates of deposits