

**Dutchie** PRESENTS

# Delivery Guide: *Pay by Bank*

*Budtender Series*


# Pay by Bank

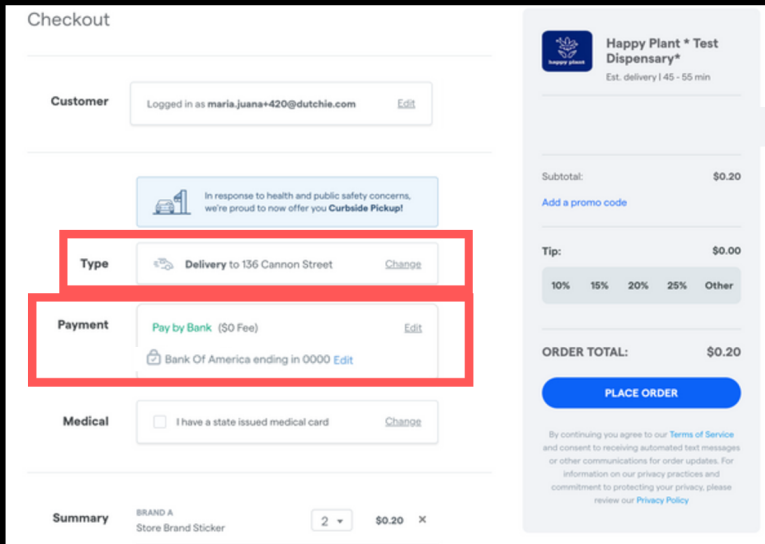
powered by  PLAID



## Pay by Bank Preorders – Delivery Flow

- 1 Customer places order on Dutchie Ecommerce Menu for delivery with Pay by Bank selected as their payment method. When customer “Places Order” a balance check is completed to confirm they have funds available at time of order placement.

 **IMPORTANT: No funds are withdrawn from the customer account until the order is finalized at the POS.**



Checkout

Customer: Logged in as maria.juana+420@dutchie.com

Type: Delivery to 136 Cannon Street

Payment: Pay by Bank (\$0 Fee)

Medical: ☐ I have a state issued medical card

Summary: BRAND A Store Brand Sticker 2 \$0.20

Happy Plant \* Test Dispensary\*  
Est. delivery 1:45 - 55 min

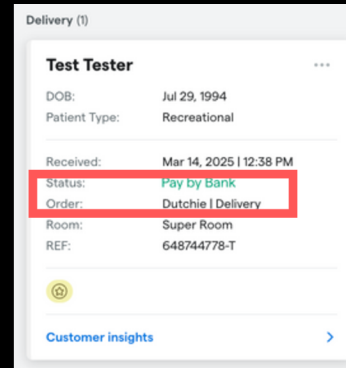
Subtotal: \$0.20

Tip: \$0.00

ORDER TOTAL: \$0.20

PLACE ORDER

- 2 Pay by Bank Delivery order is noted on POS Guestcard under Status & Order type. Budtender opens, confirms & fills order just as they would any preorder.



Delivery (1)

Test Tester

DOB: Jul 29, 1994

Patient Type: Recreational

Received: Mar 14, 2025 | 12:38 PM

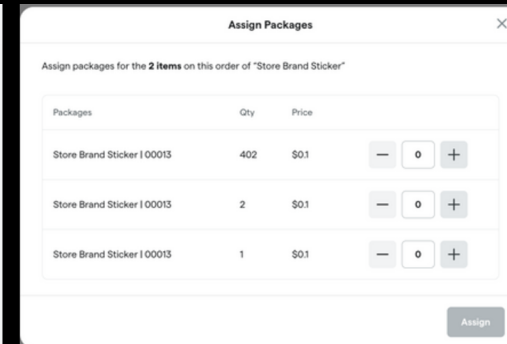
Status: Pay by Bank

Order: Dutchie | Delivery

Room: Super Room

REF: 648744778-T

Customer insights



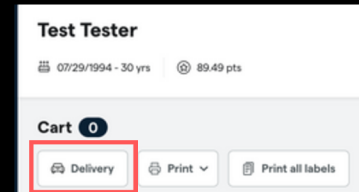
Assign Packages

Assign packages for the 2 items on this order of "Store Brand Sticker"

Packages	Qty	Price	
Store Brand Sticker   00013	402	\$0.1	- 0 +
Store Brand Sticker   00013	2	\$0.1	- 0 +
Store Brand Sticker   00013	1	\$0.1	- 0 +

Assign

- 3 Budtender taps “Delivery” button on cart screen to complete delivery details and mark order as “Ready for Delivery”.



Test Tester

07/29/1994 - 30 yrs 89.49 pts

Cart 0

Delivery Print Print all labels



# Pay by Bank

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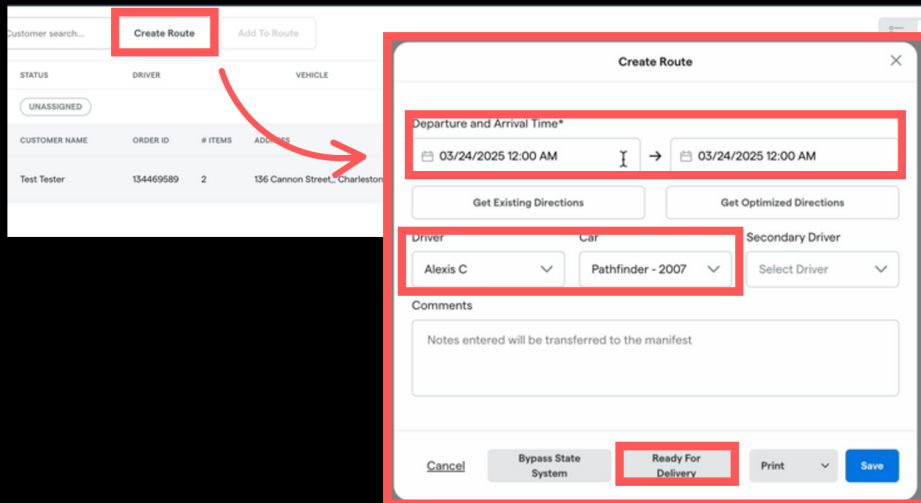


## Pay by Bank Preorders – Delivery Flow


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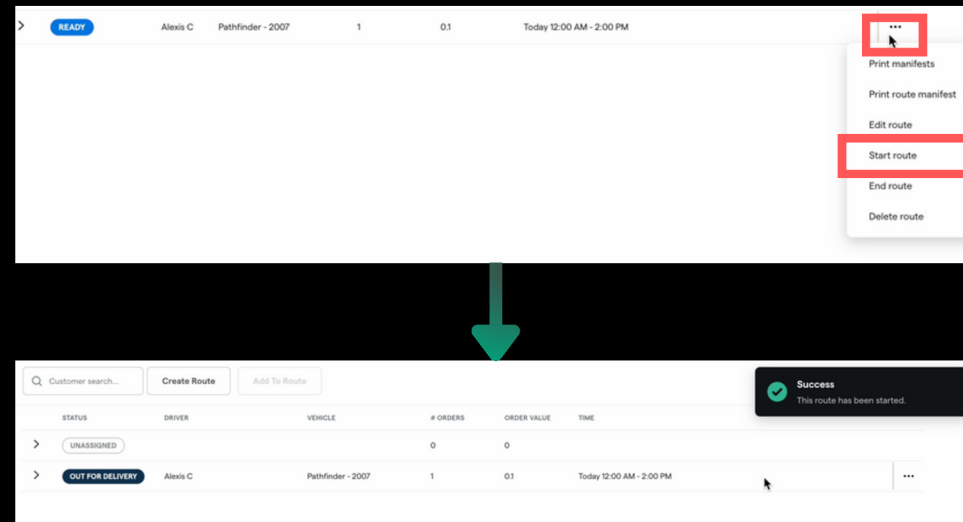
From the Delivery > Routes tab at the POS, the dispatcher will select the order, tap “Create Route”, assign a driver, assign a car & update times. With details confirmed, they will tap “Ready for Delivery”.

To add the order to an existing route, select the order and use the “Add to Route” button.



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With the route created & order assigned to the route, the dispatcher will tap the  for the route menu, then tap “Start Route”.



Delivery status will then show as “Out for Delivery” & a success message stating the route is started will appear.



# Pay by Bank

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## Pay by Bank Preorders – Delivery Flow

### Pay by Bank Delivery: Mobile Checkout

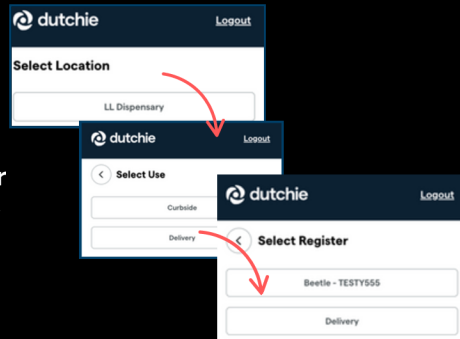
6

a

Driver will deliver the orders per their assigned route. At the customer's location, driver will open the Mobile Checkout URL on their phone or tablet.



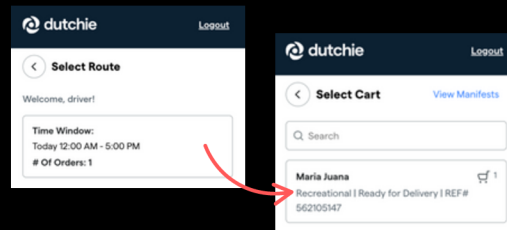
Driver will login, select their location, use for mobile checkout as "Delivery" & their register (usually their delivery car).



The screenshots show the following steps: 1. 'Select Location' screen with 'LL Dispensary' selected. 2. 'Select Use' screen with 'Curbside' and 'Delivery' options; 'Delivery' is selected. 3. 'Select Register' screen with 'Beetle - TESTY555' selected. Red arrows indicate the flow between these screens.



Then, driver selects their route & the cart or order they wish to complete.



The screenshots show: 1. 'Select Route' screen with 'Welcome, driver!' and 'Time Window: Today 12:00 AM - 5:00 PM'. 2. 'Select Cart' screen showing a cart for 'Maria Juana' with 'Recreational | Ready for Delivery | REF# 562105147'. Red arrows indicate the flow between these screens.

### Pay by Bank Delivery: POS URL on Tablet/iPad

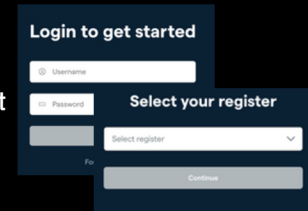
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b

Driver will deliver the orders per their assigned route. Upon arriving at the customer's location, driver will open the normal POS URL on their tablet or iPad.



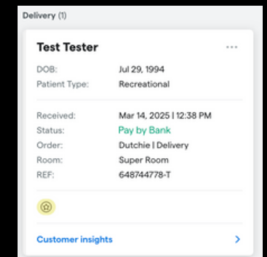
Driver will login to the POS, select their location & their register (best practice is to have a designated delivery register).



The screenshots show: 1. 'Login to get started' screen with 'Username' and 'Password' fields. 2. 'Select your register' screen with a dropdown menu showing 'Select register'.



The driver selects the Guestcard as they would any other order to open the cart.



The screenshot shows a 'Test Tester' guest card with details: DOB: Jul 29, 1994, Patient Type: Recreational, Received: Mar 14, 2025 12:38 PM, Status: Pay by Bank, Order: Dutchie | Delivery, Room: Super Room, REF: 648744778-T.



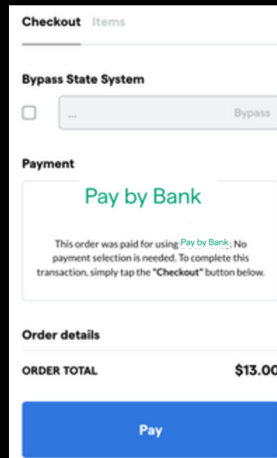


### Pay by Bank Delivery: Mobile Checkout

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a

On the mobile checkout app, driver will be able to view the cart totals & see a message that shows Payment as Pay by Bank already assigned. No other payment options will show on the app at this time. Driver taps “Pay” to finalize the Pay by Bank payment on the order. Once Pay is tapped, a final balance check is completed.



If payment is successful, driver will see the checkout panel change to “Checkout Complete” & can email the receipt, then press “Done” to close the order.



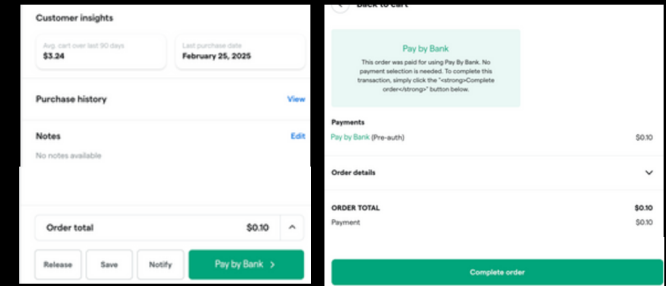
If a decline message displays, the order did not process & no funds will withdraw from the customer’s account. Driver will then see additional payment options available on the app to complete the sale. Alternative payment MUST be taken.

### Pay by Bank Delivery: POS URL on Tablet/iPad

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b

On the POS checkout panel, driver will tap “Pay by Bank” button & will see a message showing Pay by Bank already applied. Driver taps “Complete Order” to finalize the Pay by Bank payment. On the next panel, driver can email receipt & close the order.



If payment is successful, driver will see the checkout panel change to “Checkout Complete” & can email the receipt, then press “Done” to close the order.



If a decline message displays, the order did not process & no funds will withdraw from the customer’s account. Driver will need to return to checkout panel to take alternative payment & complete the sale. Alternative payment MUST be taken.