

# The Executive's Guide to Dispensary Software

The tablet displays a dispensary software interface. At the top, there's a search bar and a status bar showing the time as 4:21 PM. Below the search bar, a table lists products with columns for Name, Qty, Qty Free, Price, Discount, Total, and Discard. The products listed are Khalifa Kush, Pacifier O.G., Supreme Jack, Sourband, and Alien O.G. To the right of the table, there's a section for 'Jane Smith' with a star rating and a balance of \$9.00. Below this, there's a 'Patients notes' section with a link to 'Cart Discount Store Credit Item Discounts'. At the bottom right, there's a 'TOTAL' of \$162.00 and a 'Charge' button. Below the table, there's a 'Subcategories' section with a grid of product categories: PPG (Pacifier O.G.), POG (Paris O.G.), VOG (Vader O.G.), PG (Platinum Gorilla O.G.), PO (Platinum O.G.), AOG (Alien O.G.), KK (Khalifa Kush), SPL (Special), EGC (Exclusive Green Crack), LB (Lamb's Bread), SJ (Supreme Jack), and SB (Sourband). Each category has a small icon and a price.

Brand	Name	Qty	Qty Free	Price	Discount	Total	Discard
Indica	Khalifa Kush	2.00	0.00	\$ 12.00	\$ 0.00	\$ 12.00	
Sativa	Pacifier O.G.	1.00	0.00	\$ 10.00	\$ 0.00	\$ 10.00	
Hybrid	Supreme Jack	2.00	0.00	\$ 17.00	\$ 0.00	\$ 17.00	
Edible	Sourband	4.00	0.00	\$ 88.00	\$ 0.00	\$ 88.00	
	Alien O.G.	7.00	0.00	\$ 27.00	\$ 0.00	\$ 27.00	
	Subtotal					\$ 162.00	
	Tax					\$ 0.00	
	<b>TOTAL</b>					<b>\$ 162.00</b>	

Subcategories

Category	Name	Price
PPG	Pacifier O.G.	\$4.10
POG	Paris O.G.	999 g
VOG	Vader O.G.	999 g
PG	Platinum Gorilla O.G.	65 pcs
PO	Platinum O.G.	997 pcs
AOG	Alien O.G.	1000 g
KK	Khalifa Kush	997 pcs
SPL	Special	47 pcs
EGC	Exclusive Green Crack	313 pcs
LB	Lamb's Bread	1000 g
SJ	Supreme Jack	999 g
SB	Sourband	999 g



## A Dispensary Owner's Guide

Cannabis dispensary owners are blazing a trail in an industry without much history to draw from when it comes to retail business operations.

We've spoken with top dispensary owners and industry professionals to assemble a guide to must-have business management software features for dispensaries.

Over the next few pages, we'll give an overview of the top 10 features cannabis dispensaries won't want to do without.



### Top Features for Retail Cannabis Dispensaries:

- 1 Inventory Management
- 2 Automated Compliance Reporting
- 3 All-in-One Point of Sale Hardware
- 4 eCommerce Integrations for the Web
- 5 Digital Menu Boards and Signage
- 6 Digital Patient Check-In
- 7 Mobile Delivery App for Drivers



## Inventory Management

Managing inventory is one of the most critical aspects of running a successful dispensary for two primary reasons: customer expectation and government regulation.

# 67%

Percentage of recreational customers who cited **Inventory in Stock** as the top factor when visiting a dispensary.

Source: What Cannabis Patients & Consumers Want, Marijuana Business Daily, 2015.

### Customer Expectation

When surveyed by Marijuana Business Daily, a group of 1,200 respondents indicated **inventory in stock** as the top factor when visiting a recreational cannabis dispensary. This means that inventory levels across your physical store, your web site, and over the phone must be synced and accurate. Best-in-class dispensary software enables these critical integrations your business will be hurting without.

### Government Regulation

A business management system that can create labels when needed, scan barcodes and assign SKUs to batches received from distributors is absolutely imperative. State regulation agencies will require it of you and failure to comply could result in the following penalties:

- Interim Suspension
- Fines
- Revocation of Business License



## Automated Compliance

Beyond the license, cannabis retailers must be mindful of the legal requirements that go along with operating a retail dispensary.

### Reporting Data and Reconciling Retail Inventory

Licensed cannabis retailers will need to reconcile the physical inventory with the digital counts within your dispensary POS software. California Bureau of Cannabis Control regulations require this reconciliation every 14 days. An accurate count is also needed to reconcile inventory with reports submitted to METRC to maintain cannabis compliance.

### Verifying and Setting Limits for Patients and Customers

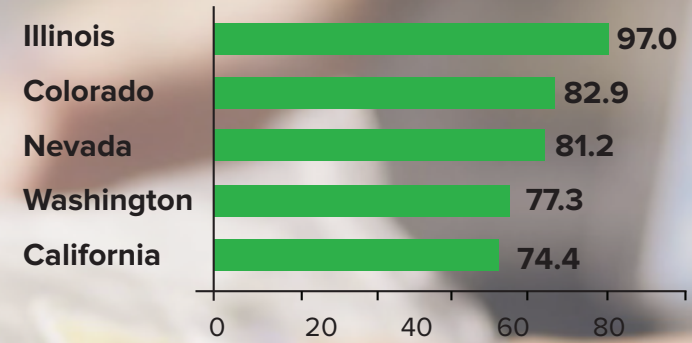
States can and do regulate how much medical cannabis users can buy in any 30-day period—but it can be difficult for patients to keep track. Automated records keep sellers in legal compliance, and they also help users to manage their purchases. That's crucial for patients who might run short, or whose symptoms might vary.

### HIPAA Regulations

The Health Insurance Portability and Accountability Act, or HIPAA, is a 1996 federal law designed to protect health care privacy, and medical cannabis sellers must follow its provisions. These include the protection of patient data, including diagnoses and personal information. Finding a software platform that encrypts and transmits data securely will save you from a lot of headaches and potential HIPAA fines.

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### Average Compliance Score by State



Source: Adherence Compliance

Scores are based on a 100 point weighted scale using the Adherence Score Application.



## All-in-One Register at the Point of Sale

Having a rock-solid point of sale system that checks the boxes below is an often overlooked aspect to operating a well-run dispensary.



Receipt  
Printer



Cash  
Drawer



Barcode  
Scanner



Customer  
Display



### Works with Scales and Label Printers

An “all-in-one” point of sale is a system that includes a barcode scanner, cash drawer, receipt printer, and monitor in a single unit. It’s also important that your system can integrate with a cannabis scale and label printer for inventory tracking purposes.



### Handles Cash, Cards, Discounts, and Specials

Like any modern retail business, you’ll want the ability to accept cash, debit and credit cards, and loyalty cards. You’ll also want to be able to apply discounts or promotional specials on your products.



### Easy to Use, Easy to Learn, Easy on the Eyes

Look for an intuitive graphic display that employees can pick-up on fast, and an online help feature that staff can use to get support quickly. You spend a lot of time and money on your decor, so why would you want anything less than sleek and modern when it comes to your point of sale hardware?



## eCommerce / Website Integration

Both medical and recreational cannabis retailers cater to the generation of digital natives that shops online, so e-commerce is a must for any cannabis dispensary.



A graphic illustrating the percentage of online transactions occurring on Fridays and Saturdays. It features the words 'FRI' and 'SAT' in white capital letters inside green squares, followed by a plus sign, an equals sign, and a green square containing '1/3'. To the right of the equation, the text 'of all online transactions.' is written in a smaller font.

$$\text{FRI} + \text{SAT} = \frac{1}{3} \text{ of all online transactions.}$$

Source: 2017 Cannabis On-Demand Report, New Frontier Data.

### Pick-up or Delivery?

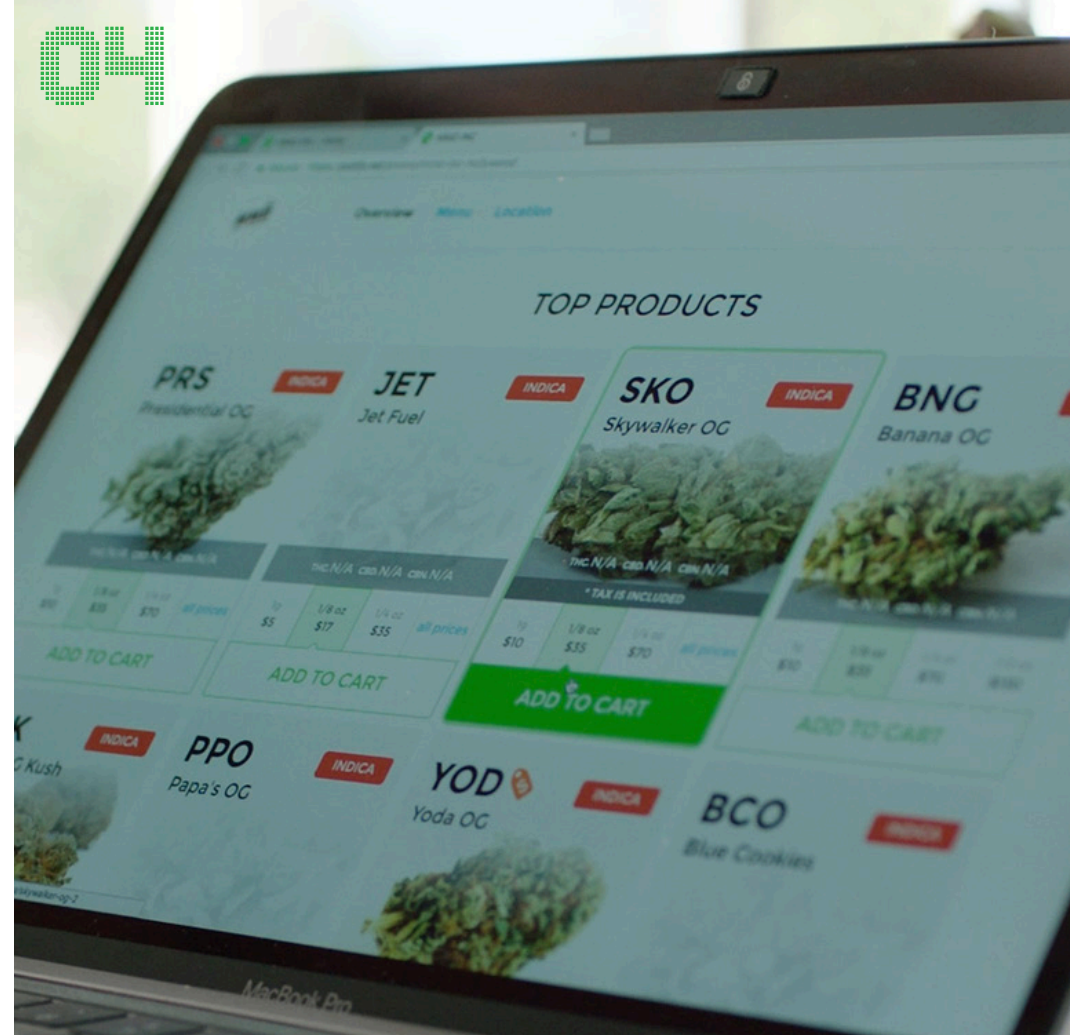
Some customers like to combine the ease of online ordering with the hands-on experience of picking up their merchandise; others prefer their orders brought to their door. Giving your customers options could be the competitive advantage that makes you the preferred dispensary.

### Up-to-Date Menus

As different strains or varieties continue to proliferate, customers need to know what's in stock—either to find their favorites, or to explore something new. Integrating online and in-store orders with the inventory management system means accurate menus and fewer unhappy customers.

### Third Party Integrations

Dispensary software such as [IndicaOnline](#) will enable retailers to add themselves to popular third-party listing sites such as Weedmaps and Potify that can greatly increase the visibility of your brand, and even serve as an additional eCommerce storefront.



**\$71.72**

The average spend by males per online transaction.

**\$69.15**

The average spend by females per online transaction.

Source: 2017 Cannabis On-Demand Report, New Frontier Data.

## Digital Menu Boards & Signage

Consider installing commercial displays that sync with your dispensary point of sale software to display real-time menus in-store and online that look great, help customers, and are easier to maintain than chalkboard or white board menus.

### Recommendations for In-Store and Online Menus:

- ➡ High-Resolution Images
- ➡ Product Descriptions
- ➡ Lab Results
- ➡ Product Categories

### \*\* EXAMPLE \*\*



THC: 27

### Cotton Candy OG

FLOWER - INDICA

1G	2G	1/8	1/4	1/2	OZ
\$20.00	\$40.00	\$60.00	\$115.00	\$190.00	\$370.00

Named for its soft, fluffy appearance and intense candied aroma, Cotton Candy Kush is a hybrid that crosses Lavender with Power Plant. The result is a pungent palate of sweet, berry flavors and a floral scent. The euphoric effects will have you feeling like a kid in a candy store, while the relaxing powers will keep stress and pain to a minimum.

56%

Identified Menu & Prices on Display as a critical factor when visiting a recreational cannabis dispensary.

Source: What Cannabis Patients & Consumers Want, Marijuana Business Daily, 2015.

## Digital Check-In

One of the easiest ways to streamline customers entering your dispensary is to use tablets for signing in. Customers can quickly enter their contact information and referral source using applications like E-Sign MD.



### Digital Collective Agreements

Another aspect of checking-in that is extremely time consuming for customers is filling out and signing collective agreement. Often times they are handed a clipboard with 3 or 4 pages of paperwork to complete. Many customer avoid going to a new dispensary just so they don't have to fill out a bunch of paperwork before purchasing their cannabis.

Adding an extra step for your digital collective agreements is easy using E-Sign MD and patients will appreciate the ability to digitally sign and initial.

## 21+

### Age Verification

One of the easiest ways to streamline customers entering your dispensary is to use tablets for signing in. Customers can quickly enter their contact information and referral source using applications like E-Sign MD. Not only is it faster, by having the customers enter their own information there is less chance of errors.

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## Mobile Delivery App

Managing a marijuana delivery service has its fair share of challenges but if you select dispensary software capable of tying online orders into your main system, it can run it like a well-oiled machine.



### Route Mapping

One way to keep your couriers focused on the road and not their phones is to make sure they can accept orders with one-click and map their route with ease. It's important that your mobile delivery application works with all navigation apps to generate the fastest possible route.



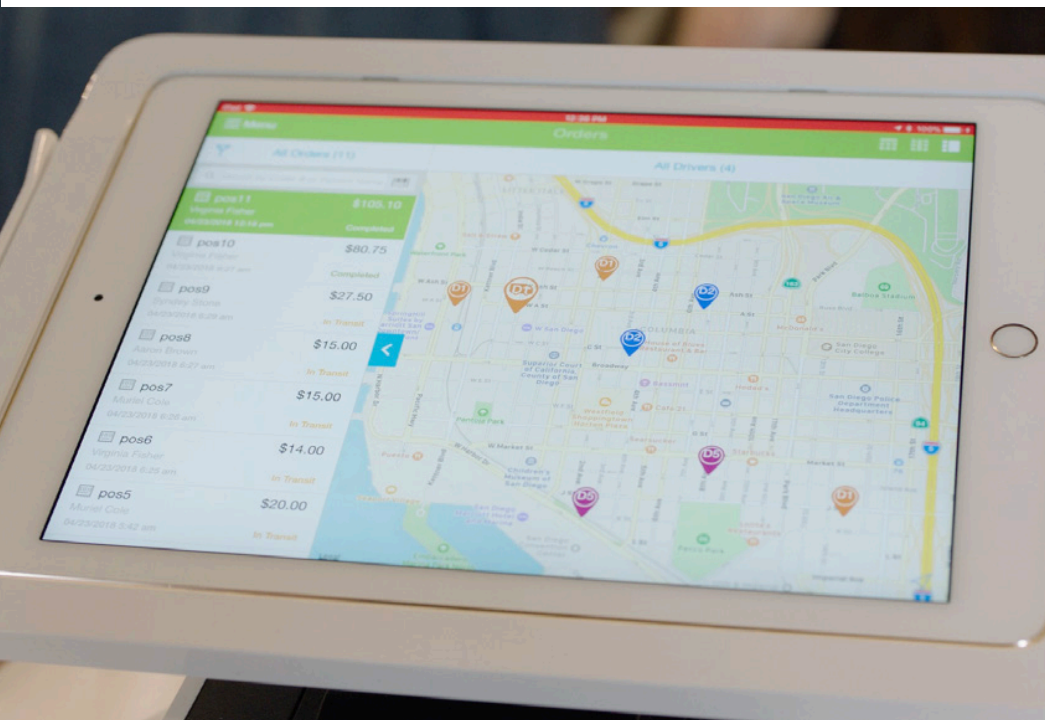
### Mobile Payment Acceptance

One of the most useful features for cannabis delivery drivers is the ability to transform their smartphones into a mobile register. All transactions will be recorded in the point-of-sale database for compliance reporting and added to the patrons purchase history.



### Paperless Checkout

Creating a digital checkout process saves your dispensary money and time. Even the receipts for transactions can be sent to the customers via email improving both transaction and delivery times. These delivery features are an integral part of optimizing your dispensary courier service and will set up your cannabis delivery drivers for success.





## Dispensary Management Software

IndicaOnline is the most trusted Point-of-Sale software in the Medical Marijuana Industry across the U.S. and Canada. Founded in 2011, IndicaOnline combines an intuitive iPad POS software, a user-friendly interface, and an all-in-one hardware unit to accommodate every aspect of a medical marijuana business. IndicaOnline's groundbreaking technology streamlines daily dispensary operations and customer retention.

### FEATURES INCLUDE:

- Website Integration
- Customer Management
- Automated Reporting
- Mobile Delivery App
- Syncs with Digital Menus
- Customer Marketing Tools
- Loyalty Programs
- Discounts & Specials



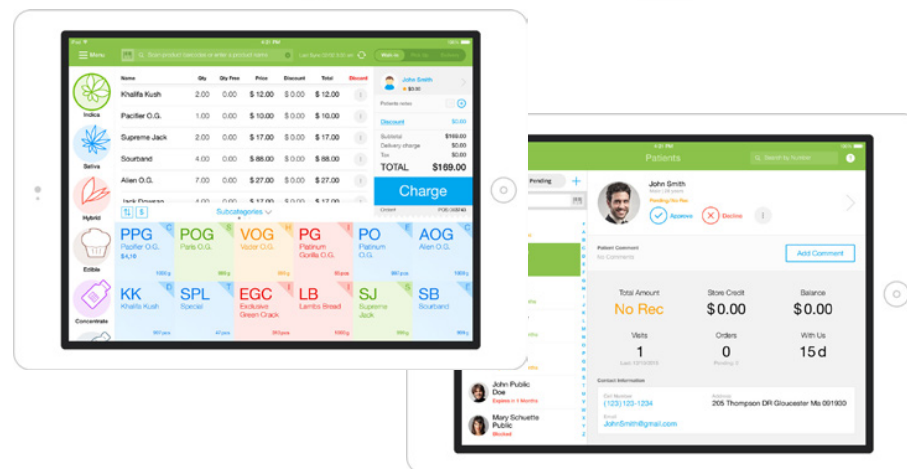
HIPAA Compliant



256-Bit SSL Encryption



100% Paperless



Book a Demo







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