

# Leafly Online Payments Overview

October 2020

# Retailers Already Using Dutchie Online Payments

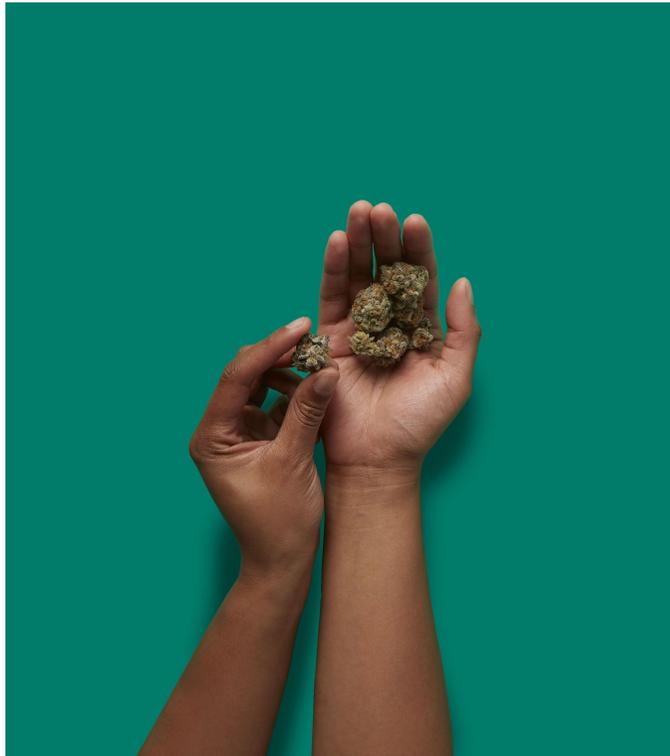
This deck includes instructions for  
retailers that are already using Dutchie  
for accepting online payments



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This is how we do it



- 1 Eligible Retailers
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## Eligibility Criteria

Leafly has now made it so that online payments are now possible for eligible retailers in Canada. Enabling online payments through Leafly helps you provide consumers with a convenient and safe option to purchase cannabis products from your store contact free.

To determine whether you are eligible for enabling online payments, you need to meet all of the below criteria.

### Criteria

- Store is located in Ontario or British Columbia
- Accepting pickup orders from Leafly customers
- Leafly/Cova order integration is enabled
- Have a Merrco|Payfirma account

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## How to Setup Online Payments

Now that you have verified that you meet all of the eligibility criteria, we will walk you through the steps to setting up the ability to accept online payments for your store on Leafly.



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# Setting up Online Payments on Leafly

## Setup Leafly with Merrco/Payfirma

- Make sure you have an account with Merrco|Payfirma. **Email** [support@merrco.ca](mailto:support@merrco.ca)
- Let them know that you are setting up online payments with Leafly in the email. **Include** your current API key from your Merrco dashboard in the email.
- Merrco|Payfirma will send you new credentials that are specific to Leafly, which will include:
  - Your Client ID,
  - Client Secret
  - and a Public Encryption Key
- You will need this information to complete the next step

### Sample Email



*Hello,*

*I have a Merrco account for my store [name of store], and I would like to implement online payment on Leafly.*

*Our current API key is [X], can you please provide us with new credentials that we can use for Leafly?  
We will need the following:*

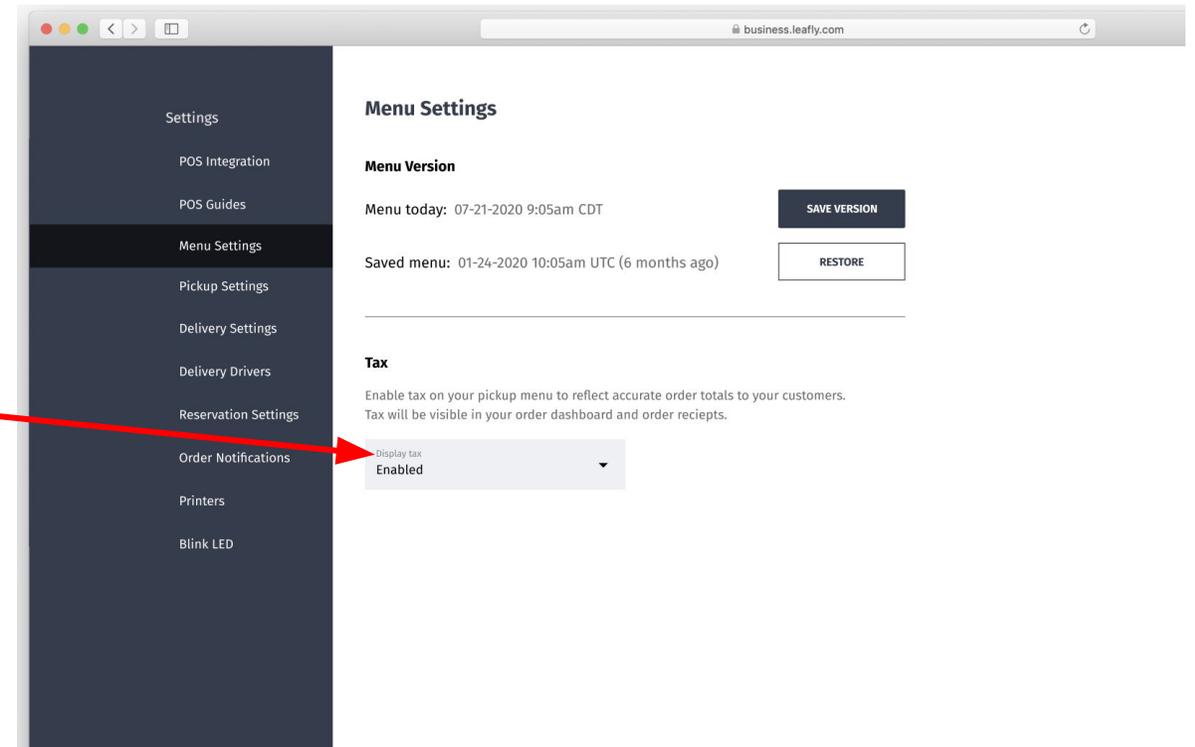
- *Client ID*
- *Client Secret*
- *Public Encryption Key*

*Thank you!*

# Setting up Online Payments on Leafly

## Verify Menu Pricing and Enable Tax

- Once you have your credentials from Merrco, **Verify** that your menu pricing is accurate for your Leafly Menu.
- **Enable** tax if you have not already for your menu by going to Menu Manager ---> then Settings ---> then Menu Settings and toggling on tax. This is an important step to ensure that you are charging customers the correct amount at checkout. As long as you have the order integration enabled, Leafly will pull the tax rates for your menu from your POS directly.



# Setting up Online Payments on Leafly

## Enable Payments in Leafly Settings

- Go to Menu Manager Settings
- Click on Pickup Settings.
- Scroll down to the Pickup Payments section.

Settings

- POS Integration
- POS Guides
- Menu Settings
- Pickup Settings**
- POS inventory Settings
- Reservations Settings
- Order Settings
- Order Notifications
- Printers
- Product Categories
- Blink LED

Enable Pickup preordering. This allows your customers to place orders outside of your pickup hours.

**Pickup Hours**

Pickup hours indicate when customers can place a pickup order online.

**Monday** (Business hours: 9:00 AM to 11:00 PM)

Open	to	Close
9:00 AM		11:00 PM

**Tuesday** (Business hours: 9:00 AM to 11:00 PM)

Open	to	Close
9:00 AM		11:00 PM

**Wednesday** (Business hours: 9:00 AM to 11:00 PM)

Open	to	Close
9:00 AM		11:00 PM

**Thursday** (Business hours: 9:00 AM to 11:00 PM)

Open	to	Close
9:00 AM		11:00 PM

**Friday** (Business hours: 9:00 AM to 11:00 PM)

Open	to	Close
9:00 AM		11:00 PM

**Saturday** (Business hours: 9:00 AM to 11:00 PM)

Open	to	Close
9:00 AM		11:00 PM

**Sunday** (Business hours: 9:00 AM to 11:00 PM)

Open	to	Close
9:00 AM		11:00 PM

**Pickup Estimate**

Do not provide estimate

**Pickup Payments**

In-store only

Save

# Setting up Online Payments on Leafly

## Enable Payments in Leafly Settings

- **Select** from the drop down the appropriate payment options that you want to offer customers. You can choose from pay online, or the choice between paying online and in store. You can always return here to disable online payments all together as well by selecting In-store only.
- **Enter** your Merrco|Payfirma credentials into the additional fields that populate once you select from the drop down.
- **Verify** and **click save**.
- **Setup complete!**

**Pickup Payments**

In store & online

\*Check your local laws to confirm online payments are permitted.

Enter your Payfirma account information.

Client ID

Client secret  
5ba9291dd2135c86b6fd23ec89bbbf6a

Public Encryption Key  
2d2d2d2d424547494e205055424c4943204b

Save

# How Does It Work

Quick overview of the customer experience and how order fulfillment will work for orders paid for online



# Customer Experience

Below is an overview of what customers will experience when you have online payments enabled for your store on Leafly.

## Checkout

Depending on what you select in setup, customers may be able to choose between paying in store or now online, or they may only be able to checkout if they pay now online. Customers only need to provide their card info and postal code.

**Complete your order**  
from Tokyo Smoke - North Bay

**How to get it**  
Pick up in store, until 10 PM

**Contact info**

First name  
Last name  
Mobile number

Used to track your order status

Date of birth  
Month Day Year

Update my profile

**Medical info (optional)**  
 I have a medical marijuana card

**Payment**

Pay at store  
 Pay now  
Visa and Mastercard accepted

Card number  
Exp. date  
CVV  
Postal code

Subtotal \$60.00 (3 items)  
Tax \$5.00  
Savings -\$8.00  
Total \$65.00

send reservation

**Payment**

Pay at store  
 Pay now  
Visa and Mastercard accepted.

You will be required to show your card and ID upon pickup.

Card number  
1234 5678 9011 1213

Exp. date 01 / 21  
CVV 001

Postal code  
P1A 2C7

Subtotal \$60.00 (3 items)  
Tax \$5.00  
Savings -\$8.00  
Total \$65.00

send reservation

## Order Confirmation Page

Leafly

Pickup order #10234  
from Tokyo Smoke - North Bay

Order placed 4:12PM  
Confirming your order  
Order ready  
Picked up

**Store details**  
Tokyo Smoke - North Bay  
2045 Franklin Blvd, Ontario, Canada  
541-505-7575  
Open - closes at 10pm

**Order summary**

This Potato  
3 \$20.00

**Payment**

Paid online  
You will be required to show your card and ID upon pickup.

Subtotal \$60.00 (3 items)  
Tax \$5.00  
Savings -\$8.00  
Total \$65.00

back to menu

Subtotal may not include tax or other promotions.  
Pay the dispensary at time of delivery. Delivery orders that exceed local limits or that include items no longer available may be modified. A dispensary agent may reach out to you if modifications must be made.

## Order Receipt Email

**Your order**

0.5 grams  
Mr. Moxey's CBD Mints  
by Brand name 1x \$11.11

0.5 grams  
Mr. Moxey's CBD Mints  
by Brand name 1x \$11.11

0.5 grams  
Mr. Moxey's CBD Mints  
by Brand name 1x \$11.11

Subtotal \$33.33  
Tax \$5.00  
Savings -\$8.00  
Total \$30.33  
 Paid online

Reservations that exceed local limits or that include items no longer available may be modified.  
A store agent may reach out to you if necessary to complete your order.

Instagram Facebook Twitter  
333 Elliott Ave. W. Ste. 200 Seattle WA 98119  
Privacy Policy Terms of Use

# Retailer Experience

When a customer places an order with your store and pays online through Leafly's checkout experience, the orders will show up in your order dashboard with an indicator that tells you the customer has already paid.

## Leafly Order Dashboard

[+ Create test order](#)

### ORDERS BEING FILLED

CUSTOMER	ORDER #	ORDER TYPE	OUT OF STOCK	CHAT	ESTIMATED TOTAL	TIME SINCE REQUEST
Nico P	100234	Delivery			\$59.25	1min

BRAND	PRODUCT	AMOUNT	QUANTITY	PRICE	
Willie's Reserve	Blue Dream 1	Substitute	1/2 OZ	1	\$14.40
Willie's Reserve	Blue Dream 2	Substitute	1/2 OZ	3	\$14.95

**Pickup #668523**

**ORDER PREPARED**

Notify customer

SUBTOTAL	\$60.00
TAX	\$5.00
TOTAL	<b>✔ Paid \$65.00</b>

#### CUSTOMER INFO

Ellen Clerk

10/20/1980 - Age 39

555-555-5555

4220 South Ave, Suite 200, Phoenix, AZ 98119

Government Photo ID

#### MEDICAL INFO

P12M-91AX-7D71-18A7

08/08/2020

Arizona

Medical Photo ID

### NEW REQUESTS

There are no new order requests

# Retailer Experience

Because you have the Cova/Leafly order integration enabled, the orders will also be deposited directly in your POS, where you can start fulfilling them. When they appear in your POS, they will have an indicator to let you know that the customer has already paid. If the order can be fulfilled, you will then confirm and complete it here.

## Cova POS

The screenshot shows the 'Orders' section of the Cova POS interface. It features a search bar with 'martin' and a list of orders. The second order in the list has a green 'PAID' label and a circled '\$22.10' total.

CUSTOMER	SOURCE	STATUS & RECEIPT #	METHOD	TOTAL
Martin Berg Oct 15, 2020 - 1:00 PM	Leafly Online	Order Placed IN3P8N-1JFEFF6	📍 Pick Up 123 Fake St. Durango, CO, 80022	\$22.10 ➔
Martin Berg Oct 15, 2020 - 12:49 PM	Leafly Online	Order Placed IN3P8N-1JFE79M	📍 Pick Up 123 Fake St. Durango, CO, 80022	<b>\$22.10</b> ➔ <b>PAID</b>

The screenshot shows the 'PICK UP' order detail screen for a customer named Martin Berg. It includes a progress bar, a table of items, a summary of charges, and action buttons at the bottom.

**PICK UP** Created by CovaTest API Cova User at 12:49 pm, October 15, 2020  
IN3P8N-1JFE79M

Martin Berg 1.00 / 56.70g [Order Placed ...](#)

ITEM	SKU	QTY	PRICE	TOTAL
House Plant: Indica - 7g 9999-00002 -\$52.00 Discount (was \$70.00)	3ATZTEF3	1	\$18.00	\$18.00
Subtotal				\$18.00
State of California Excise Tax 15.000%				\$2.70
Sales Tax 7.750%				\$1.40
<b>Order Total</b>				<b>\$22.10</b>
				<b>PAID</b>

[Print Receipt](#) [Email Receipt](#) [Print Labels](#) [Confirm & Complete](#)

# FAQ



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# FAQ

## **How does it work?**

Leafly customers who are paying for their order online will enter their credit card information when checking out on Leafly. At the time that they check out, their card will be charged in full (not just authorized), so it is important that the order total is accurate in checkout and includes tax. Merrco|Payfirma will be charging the card, and Leafly will retrieve a payment token from them, and send it to your store with the order, directly in your Cova POS. The order will display as Paid, so you will be able to identify that the customer's card was already charged.

## **What happens if a customer needs to modify their order, or cancel it all together?**

The transaction should be cancelled in your POS if the order total will be changing, because they have already been charged in full. Your Merrco dashboard allows you to process partial and full refunds to customers who paid online. Full refunds can be made same day, partial refunds can only be made the next day. Follow the instructions in your guidebook from Merrco, or reach out to them with any questions. This will be a separate action from managing the order in your POS. At this time, Leafly is not facilitating the processing any refunds. Leafly will direct customers to work with you directly, similar to how we do today, for any payment related questions. We are working on a process to simplify refunds when an order is cancelled but it is not available yet.

## **Can we enable and disable online payments on our own?**

Yes. You will have the ability to change your preferences by using the drop down options when you go to Menu Manager Settings → Pickup Settings → Pickup Payments. Online payments can be disabled by selecting in-store only from the drop down, and then clicking save.

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## FAQ

### **What happens if a customer orders above the legal limit and pays for their order online?**

Leafly is not currently checking for order limits, so you may receive an order that is over the legal limit that was paid for online. Because the order will appear in your POS as already paid, your transaction limits in Cova may not catch it if the order is over the legal limit. You will want to take a close look at the amount of cannabis being ordered before fulfilling it.. If the order is over the limit, you can cancel the order in full, and process a refund in your Merrco dashboard. Leafly is working on enforcing order limits that you have setup in your Cova POS, but they are not available at this time.

### **How will Leafly manage for fraud?**

Leafly will be adding disclaimers to the order experience to alert customers that they need to bring their credit card with them when they pickup their order, so that it can be verified. Disclaimers will display in checkout, and on the order receipt email, as well as the ready for pickup email. Merrco|Payfirma manages fraud on their end, based on the fraud controls you setup with them when you created your account.

# PaySafe Back Office Guide Details

(from Merrco, reach out to them for more details)



# Running an Activity Report

## Running an activity report

Activity reports are real-time reports that provide detailed information on transactions that have been processed through your merchant account. You can select a variety of search criteria to narrow or broaden the report as required. You can view summaries of transaction types, and you can also drill down to view details on individual transactions.

Activity reports provide two ways to search for transactions:

- Summary – allows you to search over a date range to display a summary of transactions that have been processed through your merchant account(s). Once you have run a Summary report, you can drill down to view individual transaction details.
- Lookup – allows you either to quickly locate a specific transaction or to return a list of transactions on your merchant account(s) that meet the exact criteria you select. See *Using the Lookup option in the activity report* on page 45 for more information.

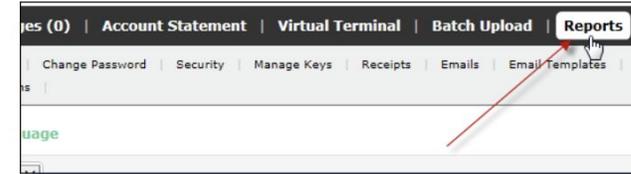
Once you drill down on a transaction you can process several transaction types (e.g., Credits and Settlements). See *Using the Activity Report to process transactions* on page 38.

For complete details on using the activity report tool, see the [Paysafe Back Office User's Guide](#).

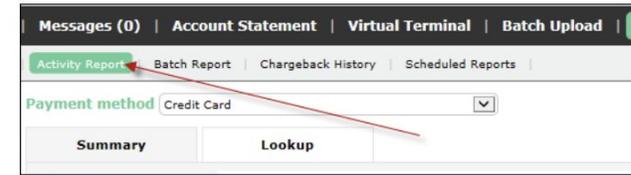
5. The more information you include, the more exact your search will be. For example, if you supply the account number, a narrow date range, and a card brand, the results will be refined accordingly.
  - Date Range – Select the date range for your search. Maximum range = 6 months.
  - Account – Select a merchant account number for your report. If you do not specify a merchant account, the report will be run on all merchant accounts available to you.
  - Currency – From the drop-down list, select the currency of the accounts you want to run a report on. If you do not specify a currency, the report will be run on merchant accounts of all currencies available to you.

### To run an activity report:

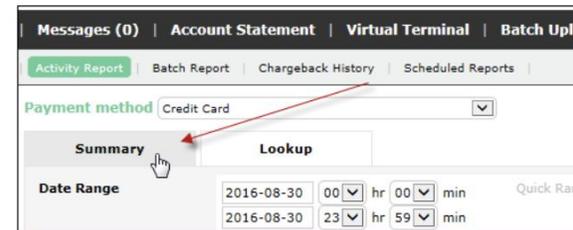
1. Click the Reports tab at the top of any back-office page.



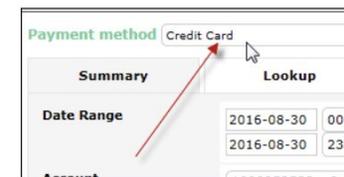
2. Click the Activity Report submenu.



3. Select the Summary tab.



4. Select the Payment Method you want to run a report on (e.g., Credit Card).



# Running an Activity Report

6. Click the Generate Summary button.

7. The resulting page displays all the transactions that match your search parameters. Click a link in the Status column for the transaction type you want to view, e.g., Completed Settlements.

8. The resulting page displays all the transactions, grouped by account, that match the transaction type you clicked on. Click the link to drill down to view individual transactions.

9. On the resulting screen, click the link in the Txn ID column for a single transaction to view its details.

Date	Txn ID	Merchant Trans. ID	Name	Card Details	Auth Code	AVS	CVD	Amount
08-12-2016 13:30:02	<a href="#">2239486720</a>	42	SVEN SVENSON	VI Credit xxxx 1843	100042	Q	M	23.55
08-12-2016 13:30:02	<a href="#">2239486680</a>	41	JOHN SMITH	VI Credit xxxx 1843	100047	Q	M	26.50
08-12-2016 13:30:02	<a href="#">2239486690</a>	40	TOH THOMAS	VI Credit xxxx 1843	100048	Q	M	42.50
08-12-2016 13:30:03	<a href="#">2239486700</a>	43	JANE JONES	VI Credit xxxx 1843	100043	Q	M	19.50
08-12-2016 13:36:00	<a href="#">2239486710</a>	47	SVEN SVENSON	VI Credit xxxx 1843	100044	Q	M	23.55
08-12-2016 13:36:01	<a href="#">2239486720</a>	48	JANE JONES	VI Credit xxxx 1843	100049	Q	M	19.50
08-12-2016 13:36:01	<a href="#">2239486730</a>	45	TOH THOMAS	VI Credit xxxx 1843	100050	Q	M	42.50
08-12-2016 13:36:02	<a href="#">2239486740</a>	46	JOHN SMITH	VI Credit xxxx 1843	100045	Q	M	26.50
08-12-2016 16:18:01	<a href="#">2239486700</a>	36	JOHN SMITH	VI Credit xxxx 1843	100051	Q	M	26.50

10. The transaction details page is displayed.

This page displays a variety of information, depending on the transaction type you drill down on. For example:

- Transaction type and status
- Merchant account number
- Transaction date
- Customer name and address
- Card brand and last 4 digits
- Bank name and transit number
- Payment transaction number

# Running an Activity Report

10. The transaction details page is displayed.

The screenshot displays a transaction details page with the following sections:

- Settlement Completed**: Txn ID: 2239484670 Account: 1001087120 Stephen's CC Account
- Consumer Information**:
  - Name: SVEN SVENSON
  - Email address: SSVENSON@EMAIL.COM
  - Phone number: 1452812320
  - IP Address: [Redacted]
  - Address: 99 Norse Way
  - Address (cont'd): [Redacted]
  - City: Barton
  - State: MN
  - Country: US
  - Zip code: 90210
- Authorization Information**:
  - Merchant Trans. ID: 42
  - Date: 08-12-2016 13:30:01
  - Auth. Conf. No.: 2239484670
  - Amount: 23.55 USD
  - Remaining to Settle: 0.00 USD
  - Card Details: V1 Credit 434287 xxxx 1943 (Exp. 11/19)
  - Txn ID: 2239484670
  - Apple Pay: [Redacted]
  - Frequency: One Time
  - Auth Code: 100042
  - Auth Mode: Purchase
  - Auth Type: Final
  - AVS Response: [Redacted]
  - CVD Response: [Redacted]
  - Pay Proc Response: [Redacted]
  - ECI Code: Failed authentication or not a 3D Secure transaction - no liability shift
- Settlements**:

Date	Txn ID	Merchant Trans. ID	Status	Remaining	Amount	Batch ID	Batch Date	ARN	Acquirer Txn ID
08-12-2016 13:30:02	2239484670	42	Completed	23.55	23.55	773770	08-17-2016 10:03:45		

This page displays a variety of information, depending on the transaction type you drill down on. For example:

- Transaction type and status
- Merchant account number
- Transaction date
- Customer name and address
- Card brand and last 4 digits
- Bank name and transit number
- Payment transaction number

# Downloading an Activity Report

## Downloading activity reports

You can download your activity report in CSV format. Each record in the downloaded report much of the information found on the transaction details page for that transaction.

### To download an activity report:

1. Generate your activity report.
2. On the resulting page, click the Attachment icon for the transaction type for which you download a report (e.g., Completed Settlements).

Transaction	Status	Count	Amount
Authorizations	Fully Settled	16	448.20
Settlements	Completed	12	326.15
Settlements	Pending	4	112.65

Credit Card Declined Requests

Transaction	Count	Amount
There are no results to display.		

3. On the Download Report pop-up, you can use Ctrl+click to select fields to include in addition to the report's default fields, and click the Download button.

Download Report

Several columns will be included in the downloaded file. You can select extra columns by using the list below.

- City
- Country
- Email address
- Phone number
- State
- Address
- Address (cont'd)
- Zip code
- Consumer IP
- Card Category
- Card Bin
- Card Issuer Country
- Status
- ECI Code
- Currency
- Acquirer Txn ID

Select additional options:

- Exclude blank lines at beginning of file
- Use minor units for amount fields
- Use double quotes for column headers

Download Cancel

4. Browse to your preferred location and save the file.

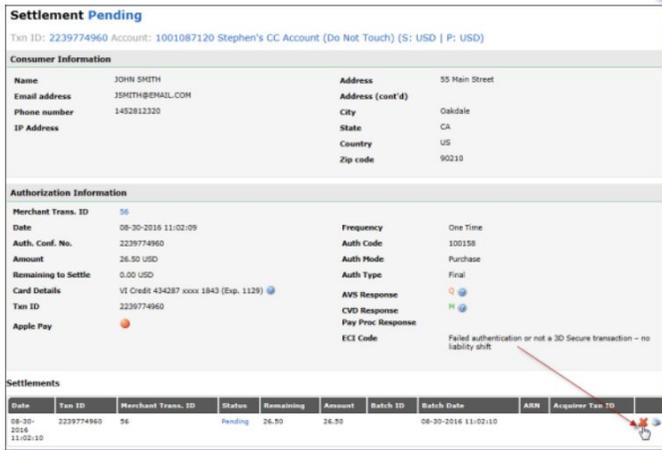
# Cancelling Settlements

## Cancelling Settlements

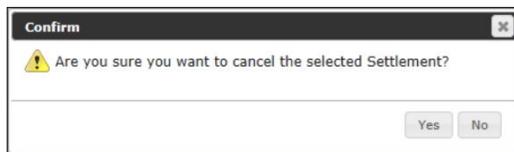
The Cancel Settlement transaction allows you to cancel a Settlement that is still in a Pending state. Both a Purchase transaction (which both authorizes and settles a transaction) and a Settlement transaction are Pending until they are settled at batch time, which is usually around midnight of the day they are initiated. You must run an activity report to locate the Settlement you want to cancel.

### To cancel a Settlement:

1. Run an activity report for credit cards, and drill down to the transaction details page of the pending Settlement you want to cancel. See *Running an activity report* on page 34 for more information.
2. On the transaction details page, click the Cancel Settlement icon  on the bottom right.



3. On the Confirm pop-up, click the Yes button.



4. The details page now shows that the Settlement has been cancelled.



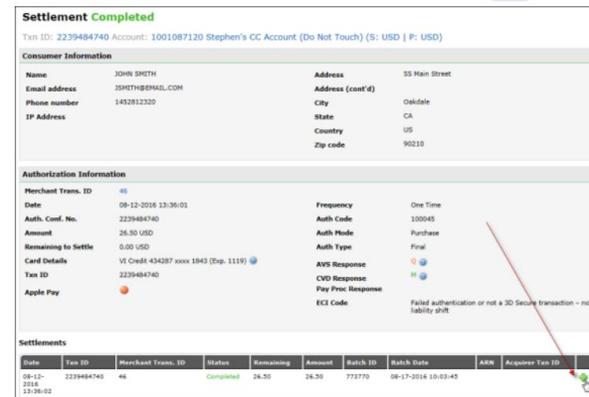
You can also cancel Settlements using the transaction Lookup tool. See *Using the Lookup option in the activity report* on page 45 for details.

## Issuing Credits

In order to issue a credit to a credit card, you must first run an activity report to locate the original Purchase or Settlement, and then issue the credit against that transaction.

### To process a credit card Credit:

1. Run an activity report for credit cards, and drill down to the transaction details page of the transaction you want to credit. See *Running an activity report* on page 34 for more information.
2. On the transaction details page, click the Credit icon  on the bottom right.



# Issuing Credits

## Issuing Credits

In order to issue a credit to a credit card, you must first run an activity report to locate the original Purchase or Settlement, and then issue the credit against that transaction.

### To process a credit card Credit:

1. Run an activity report for credit cards, and drill down to the transaction details page of the transaction you want to credit. See *Running an activity report* on page 34 for more information.
2. On the transaction details page, click the Credit icon  on the bottom right.

**Settlement Completed**  
Txn ID: 2239484740 Account: 1001087120 Stephen's CC Account (Do Not Touch) (S: USD | P: USD)

**Consumer Information**

Name	JOHN SMITH	Address	55 Main Street
Email address	JSMITH@EMAIL.COM	Address (cont'd)	
Phone number	1452812320	City	Oakdale
IP Address		State	CA
		Country	US
		Zip code	90210

**Authorization Information**

Merchant Trans. ID	46	Frequency	One Time
Date	08-12-2016 13:36:01	Auth Code	100045
Auth. Conf. No.	2239484740	Auth Mode	Purchase
Amount	26.50 USD	Auth Type	Final
Remaining to Settle	0.00 USD	AVS Response	Q
Card Details	VI Credit 434287 xxxx 1843 (Exp. 11/19)	CVD Response	H
Txn ID	2239484740	Pay Proc Response	
Apple Pay		ECI Code	Failed authentication or not a 3D Secure transaction - no liability shift

**Settlements**

Date	Txn ID	Merchant Trans. ID	Status	Remaining	Amount	Batch ID	Batch Date	ARN	Acquirer Ten ID
08-12-2016 13:36:02	2239484740	46	Completed	26.50	26.50	773770	08-17-2016 10:03:45		

3. On the Process Credit pop-up, complete the Merchant Trans. ID field. In the Amount field, enter the amount of the Settlement that you want to credit back.

**Process Credit**

Account 1001087120  
Txn ID 2239484740  
Merchant Trans. ID \*   
Amount \* 2650 

Submit Cancel

4. Click the Submit button. The Credits section at the bottom of the transaction details page shows the new Credit, with a status of Pending.

**Settlements**

Date	Txn ID	Merchant Trans. ID	Status	Remaining	Amount	Batch ID
08-12-2016 13:36:02	2239484740	46	Completed	0.00	26.50	773770

**Credits**

Date	Txn ID	Merchant Trans. ID	Status	Amount	Batch ID
08-30-2016 14:22:48	3057797b-38bf-4822-9fe0-c04b56165857	CR455	Pending	26.50	

Thank you.

