

FREQUENTLY ASKED QUESTIONS

Q: Can I create a cannabis item in Proteus 420?

A: No. In order for the API connection between MyBud and Proteus 420 to work properly each item must be created in MyBud. The item will then automatically appear in Proteus 420.

Q: I don't see Metrc listed in Data Exchanges in Proteus 420. What do I do?

A: It's possible you may not see Metrc listed as an option in Data Exchanges in Proteus 420. If so the screen will look like this:

| | PROTEUS ^{42D} | | | | | 00 ⊨ 4 ¢ Q |
|----------|------------------------|---|---|----------------------------------|-------------------|-------------------|
| | | | DATA EXCHANGES | | | |
| ad HQ | rrin | 1 | Provider | Info | Setup | Actions |
| NM. | N NAVIGATION | | Third-Party Integrations | | | |
| ή | Home | | These integrations were programmed by the outside companies listed below. Any | tech sugpart questions should be | directed to them. | |
| - | Customars | ÷ | Where's weed | | | |
| J. | a Items | + | | | | |
| 2.2 | Employees | | | | | |
| Ŀ | Reports | | | | | |
| | | | | | | |
| 0 | Settings | | | | | |
| Ξ | Data Exchanges | | | | | |

This can happen because the company location is not set up in Proteus. This is very easy to fix. Go to Settings > Company Locations then click on the location (likely to be named "HQ") and add the company address.

Screen shots follow.

| F | PROTEUS ⁴²⁰ | | | | | | |
|------------------|------------------------|---|----------|-----------------|------|-------------------|-----|
| | | | SETTINGS | | | | |
| adm HQ | in | | Compan | Administration | | | |
| MAIN | NAVIGATION | | 0 | Company Logo | - (m | Company Locations | |
| ħ | Home | | 曲 | Calendar | G | Links | |
| * | Customers | + | | | | | - 1 |
| M. | Items | + | ! | Announcements | | Employees | |
| ; 0 ; | Employees | + | | Departments | ø | Email Settings | |
| ~* | Reports | | | Vehicles | | Delivery Settings | 11 |
| ٥ | Settings | | | Delivery Zones | | Label Settings | -11 |
| 100 | Data Exchanges | | M | | = | | |
| 1 | Help | | Ë | Receipt Options | E) | Customer Export | |

| PROTEUS ^{4/20} | | | | NB 🗯 🛊 🏟 |
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| admin | ID 🔺 Name | City | State | License |
| | 1 HQ | | | |
| Home | \sim | | | |
| The nome | Note: To add additional locations of | lassa amail billing⊜noteusern com ansura vou | eard the email from an email address | that is on file and lat us know your Proteus Account name |
| 🚢 Customers + | Note. To add additional locations, p | rease entail bining@proteuserp.com, ensure you | serva die eritail front all eritail address | and to off file, and fee as allow your Proteets Account fiame |
| .H. Itoms | | | | |

| PROTEUS ⁴²⁰ | | | | | | A 🖬 🖡 | ¢00 |
|------------------------|---------------------|----|-------|------------------------|---------------------|-------|-----|
| | LOCATIONS - HQ | | | | | | |
| admin HQ | Basic Information | | ID: 1 | Physical Information | | | |
| AAIN NAVIGATION | Location Name | HQ | | Street Address | | | |
| Customers | Location Phone | | | (ex: Apt. 123) City | | | |
| items | + Photo URL | | | State / Postal Code | · · | | |
| 201 Employees | + Location Email | | | Country | Select a country: | | ~ |
| 🗠 Reports | Location Hours | | | Time Zone | Select a Time Zone: | | ~ |
| <u>.</u> | Active | | | | | | |

Once your address is entered into the system, Metrc should be available as an option in Data Exchange.

Q: How do I receive cannabis items into MyBud?

A: First, make sure you have already created the cannabis item in MyBud. Then:

 Accept the transfer with the cannabis item in <u>Metrc</u>. You should have received training from Metrc and be able to access Metrc via web browser outside of MyBud for this purpose. All customer support questions regarding Metrc should be directed to Metrc. Metrc's main contact phone number is 877-566-6506. You can also find Metrc support contact email addresses (which appear to be the best way to reach Metrc) <u>here</u>.

- Confirm the item is in Proteus 420's item list. Items > View Items. As long as the communication with MyBud is properly set up, items should automatically appear in Proteus 420.
- In Proteus 420, go to Data Exchange > Incoming Transfers in the Metrc section. See example below.

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|----------------|---|-----------------------------------|---|------------------------------|-------------------------------------|--|
| i Hama | | Data Evolution | | | | |
| Customers | | Data Excitatiges | | | | |
| Doctors | | Provider | Info | Satur | | Artime |
| Calendar | | | | | | (defined as a second s |
| Loads | | SBIOTRACK | | Setup | | Check/Send Sales |
| Vendors | | Constraint Constraint Constraints | | Coses | | Check/Send Adjustments |
| innes. | | | | Grow: | | Incoming Transfers |
| Employment | | | | Grow Rooms Plantings | Plants - Harvests - Grow History | |
| Reports | | LeafData (420demo view) | PDF Guide | lisars | | Customers |
| Benking | | | | Cases | | Products. |
| Documents | | | | Strains Initial Inventory | | Banchas — Inventory Daily Sales Report |
| | | | UP D | | | County County County |
| Processing | | Ometro | HELP: | Setup | Strains | Check/Send Adjustments |
| | | (420demo view) | Metro Introduction About these admin pages | Initial Inventory | Products/items Packages [Import] | Check/Sand Dalkerias [420demokietiveryAPI only] |
| | | | | Grow: | | Check Item Settings |
| Settinas | | | | Rooms - Plantings - Plants | - Harvests - Grow History | Cincoming Transfers |
| Dete Exchanges | | | | In the works (420demp on | ty): [import Plants] | |

4) Find the transfer in the Incoming Transfers list and click import.

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| | | | DATA EXCH | IANGE: METRC: CH | ECK INCOM | ING TRAI | NSFERS | | | | | | | | | |
| admin но MAIN NAVIGATION | | 1 | Back to Starting | Data Exchanges home Date: 01/05/2023 | - How Many | Days? 1 | V Q Filter | | | | | | | | | |
| * • | lome | | _ | | | | | | | | | | | | _ | |
| . (| Customers | + | Transfer ID | Sent From | Updated | Vehicle | License Plate | Delivery ID | Driver name | Est. Arrival | Packages | | Purch | nase C | Order | |
| | Items | + | | | 1 | | | | | | Q View (19) | | + Cr | reate F | P.O. | |
| ; 0 ; | Employees | + | | | | | | | | | La Import | > | + As | ssign 1 | To P.O | |
| ~ | Reports | - 1 | | | | | | | | | | | | | | |

- 5) Associate the transfer with the appropriate cannabis item(s) and click the import check box on the right. **Note:** Items will list in alphabetical order.
- 6) Import the transfer
- In MyBud go to Tools > Store Setup > MyBud and hit the Synchronize Packages button.

| Store Co | nfigura | tion | | | | Back to Too |
|----------------------|----------------|-----------------|----------------|----------------|----------|----------------|
| Payment Types | Taxes and Fees | Credit Card | Receipt Footer | Portal Account | Hardware | Printers MyBud |
| Synchronize Packages | : Synch | ronize Packages | | | | |
| Verification Type: | Media | cal | × | | | |
| | | | Update | | | |

Note: To confirm the transfer was successfully completed, find the transferred item in the Pricebook > click on it > Package List. The merchant should see the Metrc package ID(s) listed there.

| Duble Into Troine | Quality Onoroco | | Package List | |
|-------------------|-----------------|------------------|--------------|--|
| | | item is a carton | Package List | |
| Packa | ge ID | | | |
| 1A40A0300004E | E9000000780 | | | |
| 1A40A0300004E | EE9000000782 | | | |

You can also check their inventory numbers to be sure they are correct inside Proteus 420. Go to Items > View Inventory > Find the item > Inventory. The inventory numbers are associated with specific package IDs.

Q: Should I use MyBud to manage their cannabis inventory? A: Not if you need to report your sales to Metrc. In order to ensure that the inventory numbers are properly syncing to Metrc, please use Proteus 420 to manage your cannabis inventory numbers. **Q:** What should I do if I want to delete an item in MyBud that has already transferred to Proteus and I have already associated the item in Proteus with a Metrc package ID?

A: First, find the transfer for that item in Proteus and hit the "undo" button. Then delete the item in Proteus and delete the item in MyBud.

Q: What should I do if I want to change the item that a particular package ID is associated with?

A: First, find the transfer for that item in Proteus and hit the "undo" button. Then, complete the transfer again, this time with the correct package ID. Remember to also hit the "Synchronize" button in MyBud to make sure that the package ID also is changed in MyBud.

Q: How can I change the package ID associated with a sale that has already occurred?

A: After the sale, the package ID can be changed in Proteus. The sale can then be resent to state reporting with the correct package ID.

This is important both to be sure that the correct information is being sent to the state, and that cannabis inventory numbers in the merchant's Proteus account match the cannabis inventory numbers in the merchant's state reporting account.

To make the change:

1) Find the invoice by clicking on View Invoice in Proteus.



2) Click the invoice > Inventory > Fulfill

| Actions 🔻 | Payme | nts 🔻 | Inventory • | Shippir | ng 🔻 | PO 🕶 | Email/Te | xt 🔻 | Print 🔒 |
|-----------|---------|--------|------------------------|---------|------|------|------------|------|---------|
| | | | Fulfill Poturn Itom | 6 | d | nc | | | |
| Cus | tomer | | | 2 | | | | Inv | voice |
| , Sale | es Rep: | | | | | | - | | |
| | .5 Nop. | | TYPE | STATUS | INV | /# P | MTDUE | | ATE |
| | | | Pick-Up | paid | - | | | | |
| ITE | EM | DESCRI | PTION | | | QTY | UNIT PRICE | AM | IOUNT |

3) Change the package ID

Fulfill Invoice

| Scan UPC | ; | | (for each individual item) | | |
|----------|-----|---------------|----------------------------|---|----------|
| Item | Qty | To Fulfill | Case | PID/BID | |
| | 1 | 1 | default qty: 22.0000 🗸 | - choose PID - BatchID - choose BID - | ~ |

Q: Is there a way to bulk update inventory by package ID in Proteus 420?

A: Yes. Go to Items > Item Management > Inventory Import

Q: How do I define whether or not an item should report to Metrc by quantity or by weight?

A: Find an item in Proteus and click on it. That will bring up the screen below. Use the dropdown to mark the item to either report by weight or quantity ("Qty")

| ettings Website | Images Inventory P | ^v urchases Su | b-Products Ma | nufacturir | ng Build | Pricing |
|---------------------|--------------------------------|--------------------------|----------------|------------|---------------|---------|
| e: • Product O Se | ervice O Plant O Component | O Fees | | | | |
| asic Information | | | Physical II | nformati | on | |
| Product Name | Spinello Mango Infused PR Pr | rerolls | Weight | 1 | g (each item) | |
| metrc Name | Spinello Mango Infused PR | | Net wt | | g | |
| Short Descrip | | | MJ wt | | g | |
| SKU | 06011 | | Pack | | Per | 0 |
| UPC | 206011000002 | | UOM | | ~ | |
| Active 🗹 On Web | osite | Subs-Only | Fulfill By | Qty | | ~ |
| Med Sales Only | | | Report By | Qty | | ~ |
| Income Account | Retail Medicinal | · · | State Rep | Qty | | ~ |
| Cost Account | Cannabis Purchase | × | By OK Metre | ategory: | | |
| Asset Account | Cash | - | None. | | | |
| Strain | | ~ + | Unit Weigh | t | 0 | |
| Grade | | | Unit Wt | | ~ | |
| Gidue | | | UOM | | | 1 |

Q: Which items should report by weight and which should report by quantity?

A: Confirm how you should report which items with your local regulator. MyBud can not provide guidance on how you should report any items. In general, however, flower sold deli style will report by weight, and all other items will report by quantity.

Q: I already sold some of the items in a particular Metrc transfer before importing the transfer into MyBud. What should I do?

A: Upload the Metrc package IDs to Proteus manually. The steps to do this are:

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| F | PROTEUS ⁴²⁰ | | | | | | | | | | |
| | | | | | Q | Search Items | | | Create Thumbnails | | ľ |
| adm HQ | in 💦 | : | 1 | Create Item | | View Inventory | | 2 | Image Upload | | Ý |
| MAIN | NAVIGATION | | | J. | A | View Low Inventory | | 1 | Transfer Products | | ٥Ĩ٥ |
| ^ | Home | | Г | Update Products | (E) | Update Product Images | | 3 | Items without Pictures | | 3 |
| | Items | + | | Closing Mgr Report | 107 | Add/Move Inventory | | Ê | Items without Categories | | <u>ь</u> |
| 4 <u>8</u> 81 | Employees | + | | Inventory Verification | 74 | Receive Packages | | | Global Item Changes | | |
| ~* | Reports | | ~ | | 8 | | | <u>}</u> | | | 1 |
| | 0.00 | | * | Current Packages | | Default PackagelD's on Items | | \$ | Price Upload | | Ľ |
| * | Settings Data Exchanges | | 60 | Batch Levels | | | | 1 . | Item Update Import | | ÷ |
| 3 | Help | | _ | | | | _ (| -5 | Inventory Import | $\overline{)}$ | |
| | | | | | | | | - | | | |

1. Go to Items > Item management > Inventory import

2. On the bottom of that page select the "HQ - Default" case, and download it.



3. Open up the file and add the associated package IDs and quantity to the items. If an Item has multiple Packages with inventory, add an additional line under the item you are dealing with, copy the item line info from above and paste it into the new line below. Then enter the additional package ID and quantity for that item.

4. Go back to the Inventory Import page and use the top part of the page to upload the file you just created. For "Type" select "proteus small" if items have single packages only, or select "proteus small (separate packages)" if there are items with multiple package IDs. Select the HQ case, and then "upload".

Note: Make sure you are associating the package IDs with items that were initially created in MyBud

Q: Is there a limit to how many cannabis items can be uploaded to MyBud's pricebook?

A: 4,000.

Q: Can I sell flower "Deli Style" using MyBud?

A: Yes. "Deli Style" means that the merchant buys flower (the smokable bud that is the most popular cannabis <u>product</u>) in bulk and weighs small portions for each purchase, like when you buy cold meat by the pound from a deli. To do this, the merchant must:

- Create the item in a cannabis department who name ends in -gm

- Set the price for 1 unit = 0.1 gram

- Enter the item quantity as 10x the grams they are actually selling

For example, if they are selling the strain BG Diesel deli style, the item setup steps are:

- 1) Make sure there is a Flower Deli department whose name ends in -gm
- 2) Create an item called BG Diesel whose department is Flower Deli -gm
- 3) Set the price for the item = the price for 0.1 gram

So for BG Diesel flower sold deli style at a price of \$5 per gram, the item card in MyBud should look like this:

| 012346 BG Diesel Deli Flower -gm | | Size: | 0.1 |
|--|--|---|--|
| BG Diesel Deli Flower -gm | | Size: | 0.1 |
| Deli Flower -gm | | | 0.1 gram |
| | | | , |
| Yes No | Dept Price i Price | Sol Fiv ncludes taxes (if includes fees (if | Id by weight: No e digit price: No f applicable): No f applicable): No |
| | l be set at checkout tim le: Yes No | e Price: No Price I be set at checkout time) Ile: Yes No Dept Price i Price | e Price: No Price: 1 its I be set at checkout time) de: Yes No Dept So Fiv Price includes taxes (if Price includes fees (if Fee multiplier (if |

When a sale is made, before scanning the Metrc package ID, enter the quantity in grams sold in the following format: 0.35 = 3.5 grams, 0.1 = 1 gram, 0.7 = 7 grams, etc. The quantity in the basket will say 10x the number of grams actually being sold. So for 3.5 grams the basket quantity will = 35, for 1 gram it will = 10, 7 grams it will = 70.

Here is what a basket for 1 gram should look like.

| | | | Sector and the sector of the s | | | | |
|------------------------|--------|-------------|--|---------|----------|--------|-----------------|
| 3G Diesel 10 @ 0.50 | 5.00 T | Accessories | CBD Products | Delta 8 | Extracts | Swag | |
| | | | | | | | |
| | | 8 | | | | 0 | SKU PLU |
| | | 7 | 8 | 9 | \$20 | \$10 | \$5 |
| × Cancel Discount | \$5.00 | 4 | 5 | 6 | Check | \$6 | Baske Discou |
| • Hold | \$0.73 | 1 | 2 | 3 | | Refund | Cash |
| Coupons | | 0 | 00 | 0 | | | |
| BR Club Paid | | U | 00 | e | | | |

The merchant will still need to follow the Metrc receiving steps outlined in the installation manual and above for this item.

Q: After I purchase a MyBud POS unit, what are my monthly fees?

A: \$179.95 for the first terminal, **\$49.95** for each additional terminal, per location. So if an owner of one dispensary has 3 terminals his or her MRC would = \$279.85. That per location pricing remains even if one owner owns multiple stores. So if an owner of two dispensaries has 3 terminals in each store the MRC for each store would still = \$279.85. In other words, the cost for the first terminal at each location is \$179.95.

Q: Are there any discounts?

A: Yes. You get one month free if you pay up-front for a one year software & licensing subscription.

Q: Some of my cannabis items have UPC barcodes on the packages. Can I use those as UPC codes in MyBud?

A: Yes, **however** you will not be able to use those UPC codes to check out. In all cases, for all cannabis items, you must scan the Metrc package ID to be able to check out an item.

Q: What is MyBud Club?

A: MyBud Club is a growing customer loyalty and retention program. You can use MyBud Club to save your customer's patient license ID #s and see their most recent transaction.

Q: If a different merchant using MyBud has already created a MyBud Club account for a customer, will that customer's patient license ID be available in a different store that uses MyBud?

A: Yes, but only by state.

Q: How do I see which Metrc package IDs are associated with a particular cannabis item?

- A: Pricebook > Click on item > Package List
- **Q:** Is there a MyBud payment processing option?
- A: No, but we are working on one that we hope to launch soon.
- **Q:** Can I create new cannabis or non-cannabis departments?
- A: Yes.
- **Q:** Can I obtain assistance with uploading my items into the Pricebook?
- A: Yes. Reach out to us for help.
- **Q:** Is reporting available ?
- **A:** Yes. To see your reporting, click the Terminal Statistics button.
- **Q:** Do I need the internet for MyBud?

A: The POS requires hardwired internet to update and function properly. Wifi is not enough. At least 25/5 MB internet speed connection is necessary in order to receive remote support, software updates, backups and important notifications.

Q: Does MyBud have ecommerce?

A: Not currently, but this is a feature we will include in the future.

Q: What is your return policy?

A: Customers must hold the POS equipment for at least 60 days from the date of installation in order to initiate a return. (Example: If the unit was installed on May 15th, the 60 days waiting period prior to initiating a return will be July 14th.) The return authorization request form must be submitted no later than maximum 30 days after the 60-day hold period. After 90 days from the date of installation, no returns will be accepted. Preceding the return of equipment, a return authorization form must be submitted and approved. Once the return is approved, customers will ship the unit back to MyBud at their own expense. Upon return of equipment, in good condition and inspected to be free of cracks and damages, refund will be issued by credit card or check, based upon the original method of payment. If the equipment is returned damaged (beyond normal wear and tear of short term use) MyBud reserves the right to deny refund or issue a partial refund. To request a refund please contact your sales rep.

Q: Can inventory be purchased via MyBud?

A: Not directly, but we are looking into an integration with popular marketplaces for the future.