

# CannaData 0.0.0.900 Documentation

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# Chapter 1

## Preliminaries

The CannaData platform enables Marijuana dispensaries to manage their patients, inventory, point-of-sales, and online presense with one integrated platform. Each client receives a seperate Virtual Private Cloud instance where their data is securely stored. When you create an account with CannaData you will be given a unique url for your dispensary. For example, a dispensary named “storename” would likely receive the domain <https://storename.cannadata.com> where they can securely access the CannaData platform.

An elegant, and up-to-date menu is readily available at <https://storename.cannadata.com/menu>, which can easily be integrated into your dispensaries webpage.

CannaData is not simply a piece of software. We are your go-to data, and technology consultant. Once your dispensary is integrated into our data pipeline, we over a variety of custom business services including reporting/analytics, A/B testing for marketing campaigns, patient surveys, and more.

This documentation explains how to use the CannaData platform’s 4 primary applicaitions.

### 1.1 Contact

We love getting feedback! Please email Carl Ganz



# Chapter 2

## Frontdesk

The Frontdesk is where every dispensary first makes contact with their patrons. Dispensaries must keep track of all patrons, and verify that they are valid medical marijuana patients. This requires checking-in each patron when they enter the store. The CannnaData Frontdesk application provides facilities for:

- Checking-in patients
- Adding new patients

### 2.1 Returning Patients

For returning patients, the front desk is responsible for:

- Validating the returning patient is who they say they are
- Making sure their medical card is still valid
- Controlling how many patients are allowed in the store at one time, and making sure that patients are processed in the correct order

All patient interactions begin by scanning the patient's state issued ID. For returning patients this will pull up the patient's profile where the budtender can quickly see the patient's current medical status, as well as other basic information about the patient.

**(NOTE TO NAYELI: I don't know if the images are placed optimally in the patient info page. I tried this alternative set-up that may have potential but didn't really work out as I hoped. I'd appreciate your thoughts here.)**

This makes it easy to verify that the patient's medical card is still valid. You can also access a patient's info page by either searching for them in search box in the top, or by selecting them from the All Patients table.

For valid patients, the budtender has buttons at the top that allow them to let the patient directly into the store, or if there is a line to get in to the store, they can add the patient to a queue.

#### 2.1.1 Queue

The homepage of the Frontdesk app keeps track of who is currently in the store, and who is currently in line to get in the store (queue). These tables make it easy to see who is next in line, and how long people have been waiting.

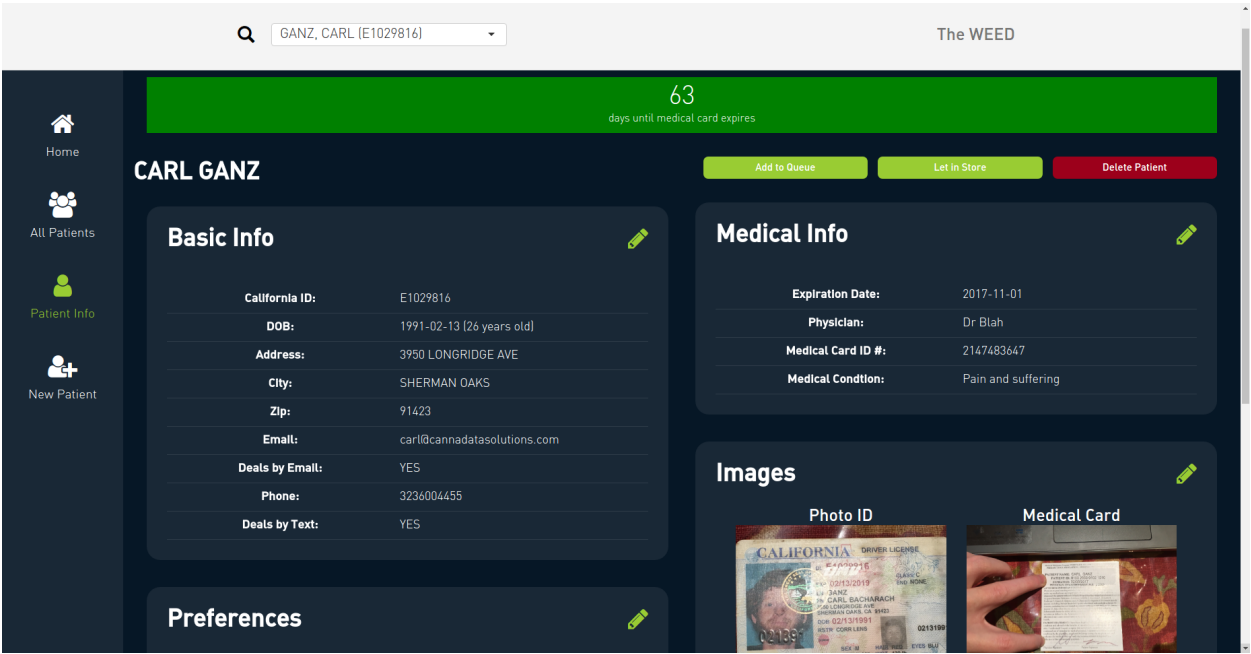


Figure 2.1: Returning Patient Info

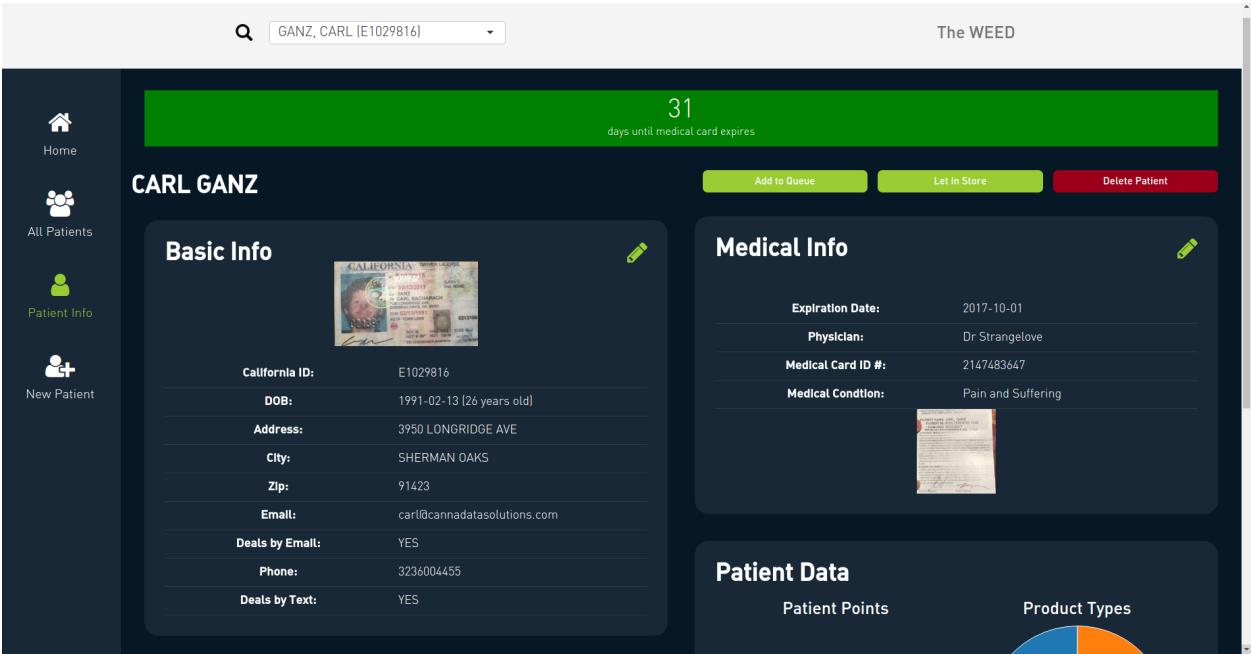


Figure 2.2: Alternative Returning Patient Info



Search

Search

CARL BACHARACH GANZ (E1029816):

- Date Added: 2017-08-26
- Status: Ready
- Expiration Date: 2017-11-01

**All Patients**

Name	California ID	Age	Expiration Date	Last Transaction	Average Spent
CARL GANZ	E1029816	26	2017-11-01	2017-08-26	<a href="#">Info</a>

Figure 2.3: All Patient Table

Search

GANZ, CARL (E1029816)

The WEED

Home

30  
days until medical card expires

**CARL GANZ**

[Add to Queue](#) [Let in Store](#) [Delete Patient](#)

Figure 2.4: Returning Patient Buttons

Search

The WEED

Home

All Patients

Patient Info

New Patient

Queue

Name	California ID	Arrival Time
No data available in table		

In Store

Name	California ID	Arrival Time		
1	CARL GANZ	E1029816	08:09 PM	<div>Info</div> <div>Remove</div>

Figure 2.5: Queue

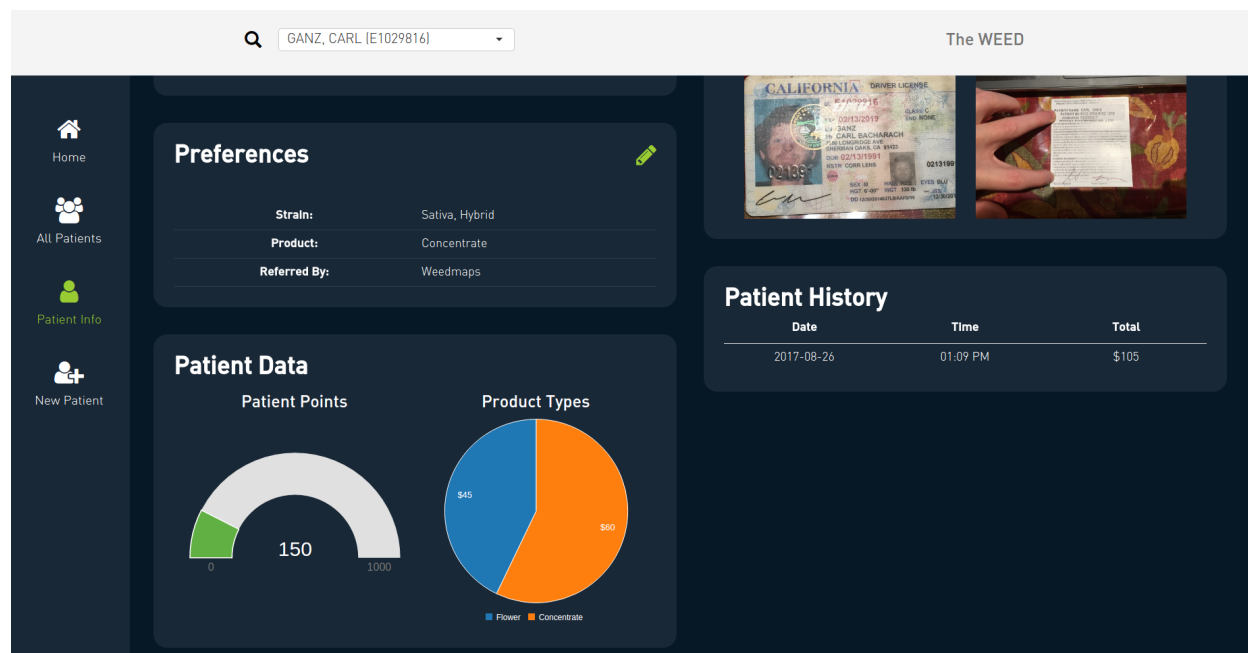


Figure 2.6: Charts

### 2.1.2 Charts

The patient info page provides charts and tables that are useful to the budtender. This includes:

- The number of reward points the patient has accumulated (and how many more points they need to get a prize)
- Which types of products the patient has bought in the past
- Details of past transactions

### 2.1.3 Updating Info

When a patient's medical card expires they have to get a new card, and bring that information to the dispensary. All information in the patient info page is editable including the medical card info, and patient images.

## 2.2 New Patients

For new patients, when their ID is scanned a message will appear indicating that the patient is new. The budtender has the option to add the new patient which initiates the patient sign-up process.

When the patient's ID is first scanned, the information from their ID is automatically added. The budtender uploads the patient's documents, and enter a small amount of information from the patient's medical card, specifically the name of their doctor, the expiration date, and the medical card ID number.

While the budtender enters this information, the patient is presented with an iPad (or other tablet or computer) where they enter their information into the Signup application discussed below.

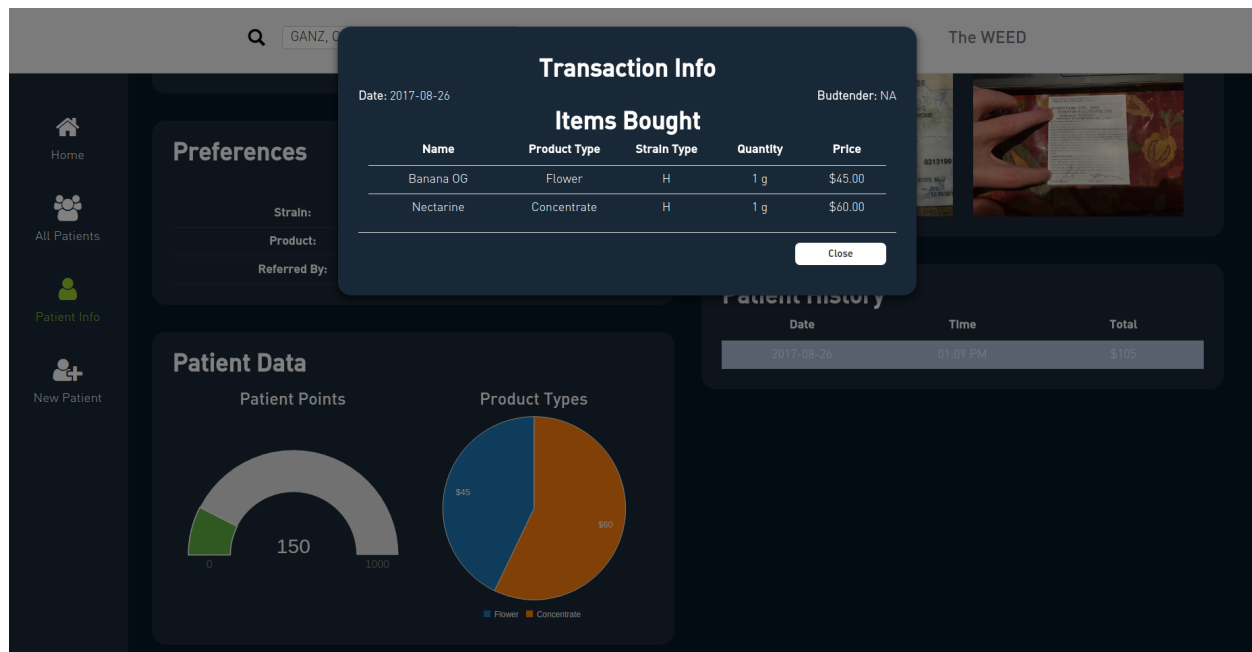


Figure 2.7: Patient History

The screenshot shows the same dark-themed web application interface. A modal titled "Edit Medical Info" is open, displaying a form for editing patient medical information. The background shows the sidebar and the main area with "Basic Info" section.

**Edit Medical Info**

Physician \* Dr. Blah

Expiration Date \* 2017/11/01

Medicaid Card # \* 2147483647

Condition Pain and suffering

Submit

**Basic Info**

CALIFORNIA ID: E1029816

Expiration Date: 2017-11-01

Physician: Dr. Blah

Let in Store Delete Patient

Figure 2.8: Edit Medical Info

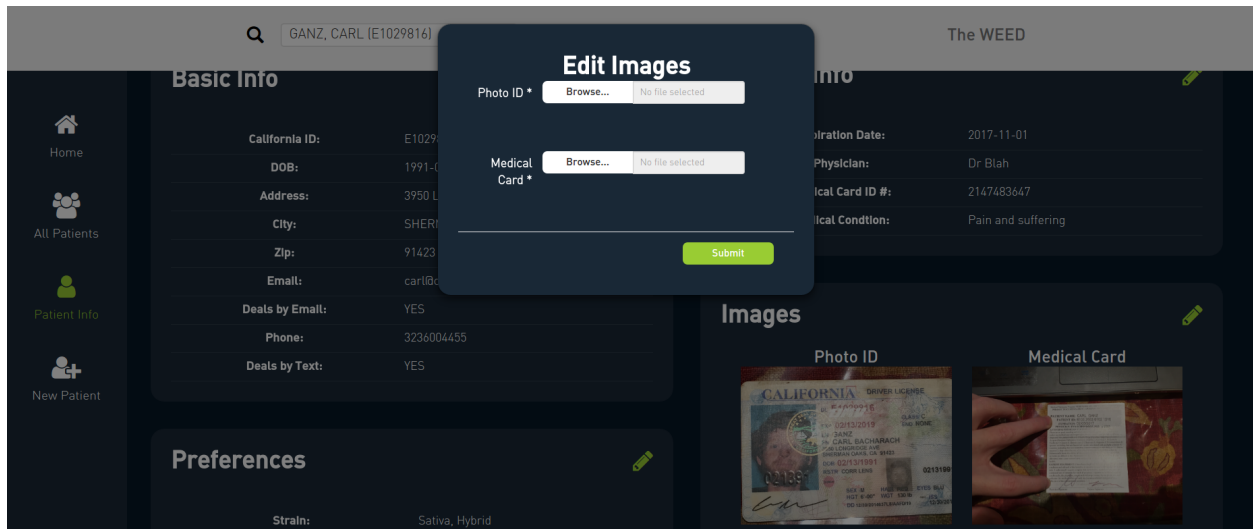


Figure 2.9: Edit Images

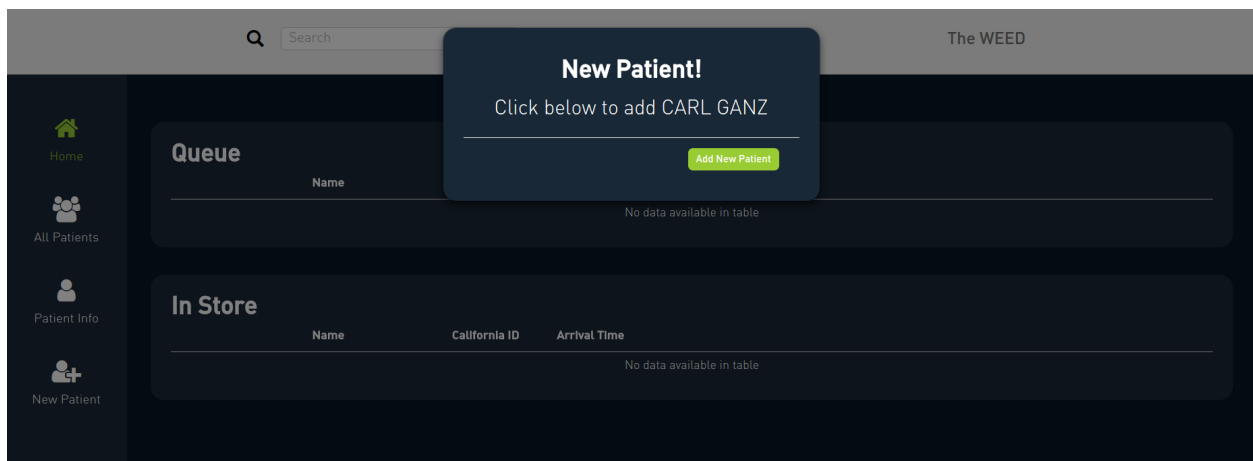


Figure 2.10: Add New Patient Screen

Search: GANZ, CARL [E1029816] The WEED

**CARL GANZ** Submit Delete Patient

**Basic Info**

California ID:	E1029816
DOB:	1991-02-13
Address:	3950 LONGRIDGE AVE
City:	SHERMAN OAKS
Zip:	91423000
State:	CA

**Enter Medical Information**

Physician \*

Expiration Date \*

Medical Card # \*

**Upload Patient Images**

Photo ID \*  No file selected

Medical Card \*  No file selected

**Images**

Photo ID: NO IMAGE AVAILABLE

Medical Card: NO IMAGE AVAILABLE

Figure 2.11: Empty New Patient Form

Search: GANZ, CARL [E1029816] The WEED

**CARL GANZ** Submit Delete Patient

**Basic Info**

California ID:	E1029816
DOB:	1991-02-13
Address:	3950 LONGRIDGE AVE
City:	SHERMAN OAKS
Zip:	91423
State:	CA

**Enter Medical Information**

Physician \*

Expiration Date \*


Medical Card # \*

**Upload Patient Images**

Photo ID \*  ID.JPG Upload Image

Medical Card \*  REC.JPG Upload Image

**Images**

Photo ID: 

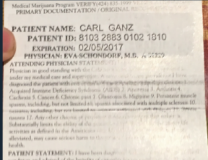
Medical Card: 

Figure 2.12: Completed New Patient Form

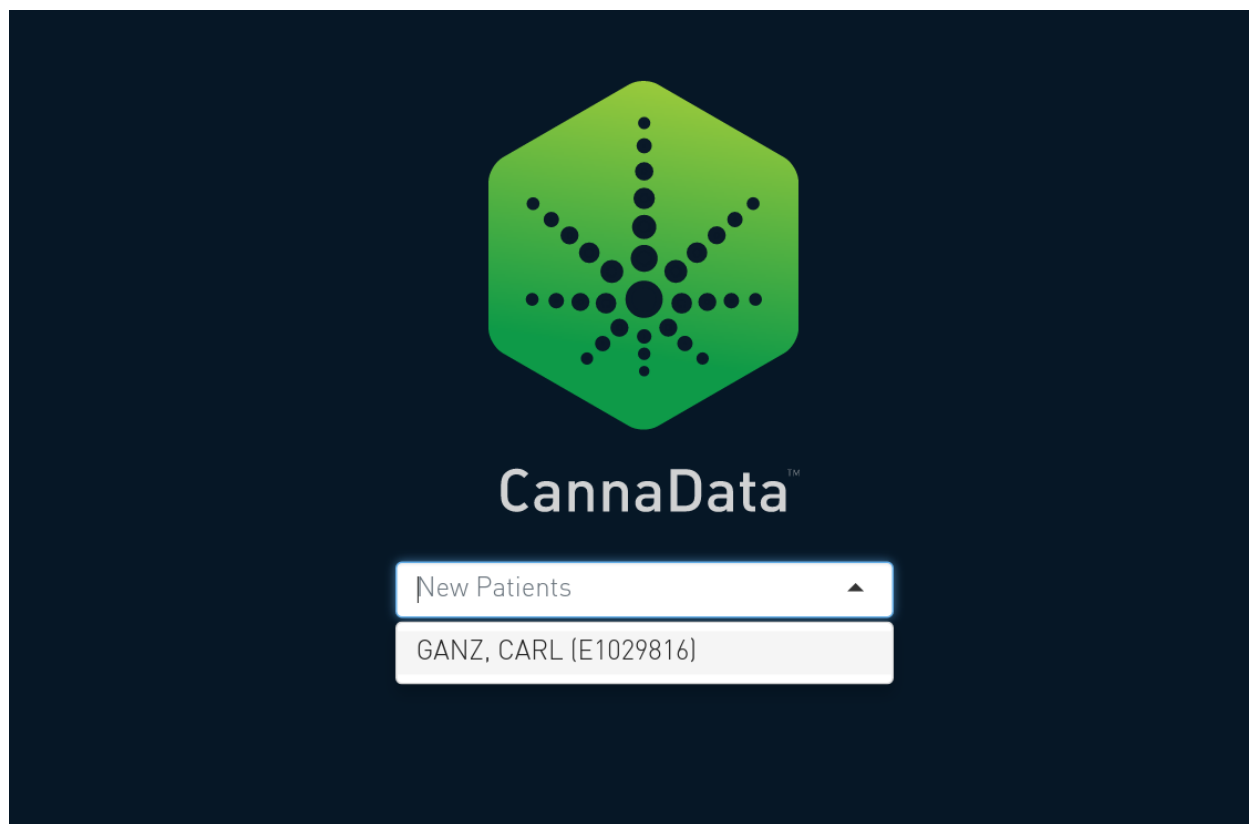


Figure 2.13: Select A New Patient

### 2.2.1 Signup

The Signup application works in conjunction with the Frontdesk app to let new patients quickly join a dispensary. When a new patient's ID is scanned they are added to the database, but their profile is incomplete. The budtender must input some information (discussed above), and the patient must complete the signup form (and sign the patient agreement), before they can enter the store. The first page of the signup form contains an input where the budtender can select the incomplete profile of the new patient.

Once the incomplete profile is selected the budtender would hand the iPad over to the new patient who would fill out the rest of the form. The first page of the signup form is automatically filled in based on the information on the patient's driver's license.

There are three additional pages where the patient fills in their contact info, and preferences.

**(NOTE TO NAYELI: I think the patient preference input is an area where we can be creative. In lieu of the plain old checkboxes we could use cool icons representing flower, concentrate, edibles, etc.)**


After the patient completes the form they are automatically sent to a page where they digitally sign the new patient agreement contract. This makes the signup process completely paperless.

1 out of 4

Personal Information

CARL	3950 LONGRIDGE AVE
GANZ	SHERMAN OAKS
1991/02/13	CA 91423
E1029816	Next

Powered by



CannaData

Figure 2.14: Autofilled Basic Info

3 out of 4

Preferences

What type of cannabis do you prefer?

☐ Hybrid

☐ Sativa

☐ Indica

How do you prefer to consume your cannabis?

☐ Flower


☐ Concentrate

☐ Edible

☐ Other

Next

Powered by



CannaData

Figure 2.15: Preference Info





## Chapter 3

# Inventory

The Inventory Management application provides facilities for:

- Adding new inventory and new wholesalers
- Viewing the performance of past products and wholesalers
- Checking quantities of current stock
- Updating/editing information about existing products
- Print labels/barcodes for inventory

### 3.1 New Inventory

The new inventory page allows you to enter new shipments of inventory into your database. Digitally managing inventory doesn't just make it easier to keep track of products, but it also simplifies the record keeping process required for taxes, and other regulations.

The image displays two screenshots of a web application's 'New Product' form. The top screenshot shows the 'Basic Info', 'Strain Info', and 'Wholesaler Info' sections. The bottom screenshot shows the 'Wholesaler Info' and 'Price Info' sections, with the 'Images' section visible at the bottom.

**Top Screenshot: New Product Form**

**Basic Info**

- Product Type\*: ☐ Flower ☐ Concentrate ☐ Edible ☐ Other
- Product Name:
- Description:

**Strain Info**

- Strain\*:
- THC (%):
- CBD (%):
- Indica: ☐
- Sativa: ☐
- Hybrid: ☐

**Wholesaler Info**

- Wholesaler\*:  [New Wholesaler](#)
- Wholesale Price\*:
- Quantity\*:
- Derived From Another Product\*: ☐ No ☐ Yes

**Price Info**

1 g:	<input type="text" value="\$20"/>
3.5 g:	<input type="text" value="\$70"/>
7 g:	<input type="text" value="\$140"/>
14 g:	<input type="text" value="\$280"/>
28 g:	<input type="text" value="\$560"/>

**Bottom Screenshot: New Product Form (Continued)**

**Wholesaler Info**

- Wholesaler\*:  [New Wholesaler](#)
- Wholesale Price\*:
- Quantity\*:
- Derived From Another Product\*: ☐ No ☐ Yes
- Original Product\*:
- Quantity Used\*:

**Images**

- Product Image:

There are several required fields in the new inventory form:

- Product Type (i.e. flower vs concentrate vs edible etc.)
- Strain (No strain is an option, but must be explicitly selected)
- Wholesaler
- Wholesale price
- Quantity
- Price

There are also several optional inputs, and inputs that are only required sometimes:

The screenshot shows a 'Price Info' form with a dark blue background. It contains five rows, each with a quantity label on the left and a corresponding price input field on the right. The input fields are light gray with rounded corners. The 2 g input field is highlighted with a blue border, indicating it is the active field. The values shown are: 0.5 g: \$30, 1 g: \$60, 2 g: \$100, 3 g: \$150, and 5 g: \$250.

Quantity	Price
0.5 g:	\$30
1 g:	\$60
2 g:	\$100
3 g:	\$150
5 g:	\$250

Figure 3.1: Price Input with 2 g level manually set to \$100

- Product Name (required if no strain selected)
- Description
- THC & CBD levels
- Whether product is Indica/Sativa/Hybrid
- Image
- Source product and quantity (i.e. if you take 50 grams of Banana OG and make 75 joints, when you enter the 75 joints you would also want to remove the 50 grams of Banana OG that the joints are derived from)

### 3.1.1 Pricing

The price input contains default values based on the product type. Whenever a value in the price input is updated, the rows below the changed value, representing the price for larger quantities, are updated to be consistent with the new value. For example, the default price for concentrates is \$30 per half gram. This rate is used for higher quantities so 1 gram is  $\$30 \times 2 = \$60$ , two grams is  $\$30 \times 4 = \$120$ , etc. We can update the price for two grams to \$100, which translates to \$50 per gram. Now all quantities above two grams are priced at the \$50 per gram rate, while all quantities below two grams retain the \$30 per half gram (\$60 per gram) rate.

Search

Products

- Nectarine: (from Byron LLC)
  - Quantity: 250 (pkg)
  - Strain: Nectarine
  - Product Type: product
  - Dated Added: 2017-08-30
- Banana OG: (from Byron LLC)
  - Quantity: 150 (pkg)
  - Strain: Banana OG

Store Name

**Current Inventory Table**

Name	Wholesaler	Product Type	Date Added	Current Inventory	Price	Info
Banana OG	Byron LLC	Flower	2017-08-26	150 (g)	\$20 (per g)	Info
Nectarine	Byron LLC	Concentrate	2017-08-30	250 (g)	\$60 (per g)	Info

Inventory

Product Info

New Product

Wholesaler

Figure 3.2: Current Inventory Table

## 3.2 Past Products

Details about existing and past products are easily accessible. You can search for any past inventory and all wholesalers in the search box at the top. You can also view current inventory in the current inventory table.

When you select an item you are taken to the product information page. This includes a variety of tables regarding the specific product with the option to edit. Buttons at the top allow to quickly add more inventory and print barcodes for the product.

Basic analytics are provided so you can quickly see how the product is performing. Daily sales are charted, and average daily profit is rated against other similar products.

## 3.3 Wholesaler

You can also view information about specific wholesalers. When you select an item the item's wholesaler is available in the wholesaler page. You can also select a wholesaler in the search box at the top.

Analytics about the wholesaler including daily sales, average daily profit, and product type.

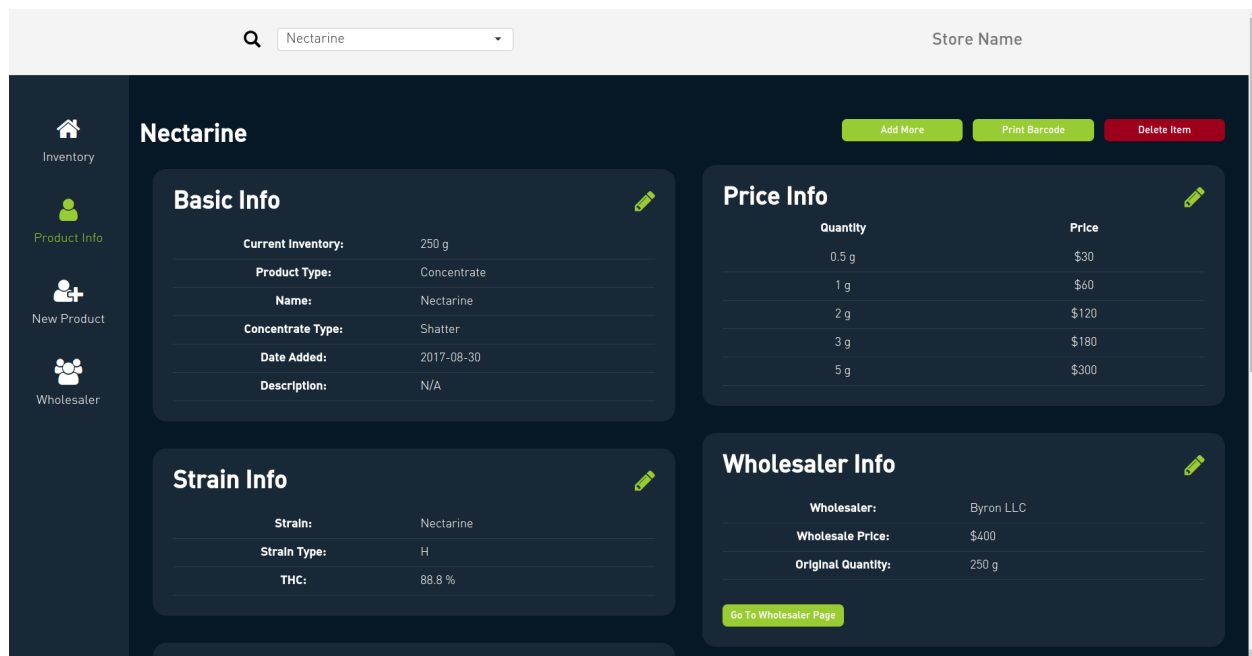


Figure 3.3: Current Inventory Table

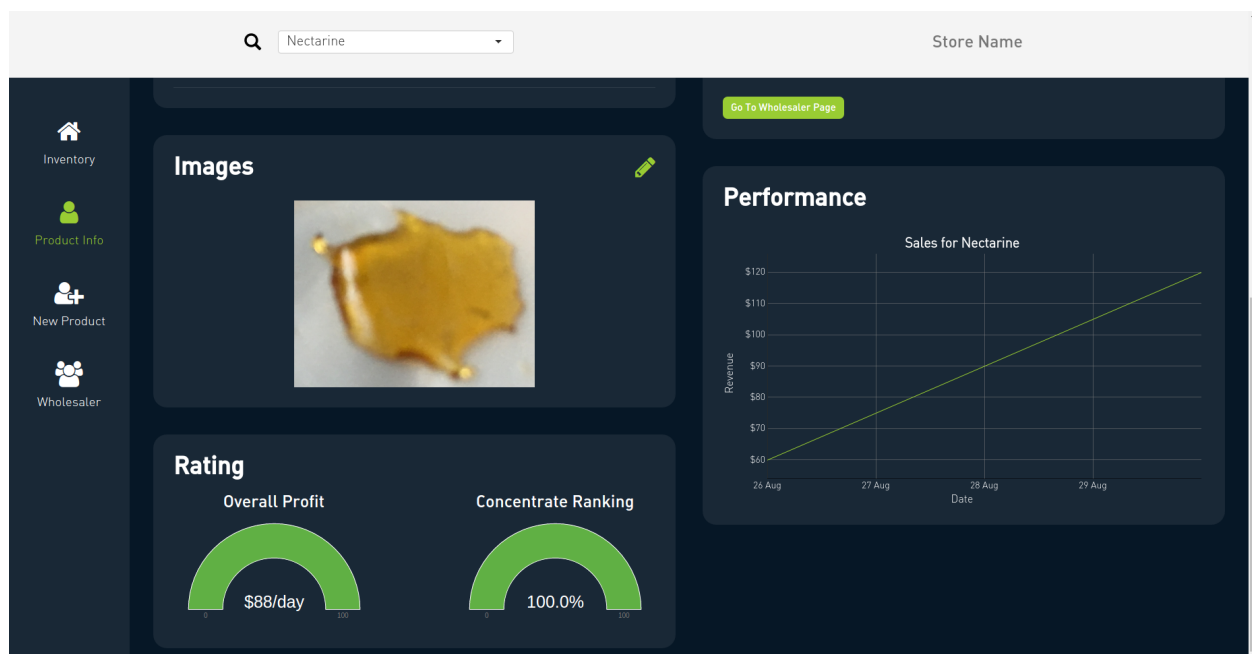


Figure 3.4: Current Inventory Table

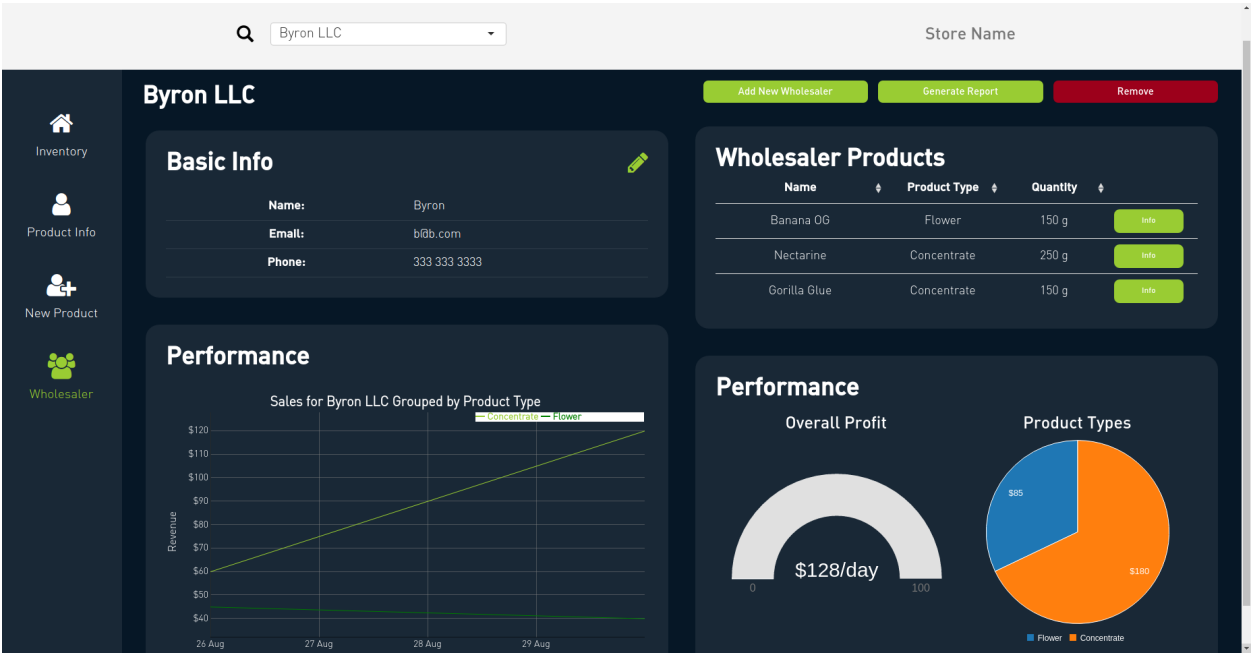


Figure 3.5: Current Inventory Table

## Chapter 4

# Connect

Many dispensaries try to encourage patients to come to their store with coupons, and targeted messages. The Connect Application provides facilities for:

- Creating coupons/deals
- Reaching out to patients via text, or email

### 4.1 Coupons

#### 4.1.1 New Coupons

The required information for a new coupon is:

- A name
- A discount (either a flat amount i.e. \$10, or a percentage i.e. 10%)
- A minimum (either a minimum total amount spent i.e. \$60, or a quantity i.e. 3.5 grams)
- Which products the discount applies to. Options include:
  1. Total (i.e. take 10% off total bill)
  2. All products of a certain type (i.e. on Wax Wednesdays you discount **all** concentrates)
  3. Specific products
- Lastly you have to choose when the coupon is active

**(NOTE TO NAYELI: For specific items there is a problem in that you are forced to select a single discount, and quantity for all the specific items. It would be better if they could select different discounts and quantities for the individual items. When you send me code for menu I may use a version of that to recreate the specific item part. I'd appreciate your thoughts here.)**

#### 4.1.2 Coupon Info

You can view information about existing coupons by selecting them in the search box in the top. The coupon info page provides basic information that can be edited as well as a list of current inventory that is discounted when the coupon is active. There is a graph of daily sales for the discounted products, which enables you to see if the coupon created a positive bump.

The screenshot shows the 'Add New Coupons' form. The left sidebar contains navigation links: 'New Coupon' (active), 'Coupon Info', 'New Message', and 'Message Info'. The main form area is divided into three sections: 'Basic Info', 'Date Info', and 'Targets'. The 'Basic Info' section includes fields for 'Name \*', 'Discount \*', 'Minimum Spent' (set to '\$0'), and 'Max' (set to 'Unlimited'). The 'Date Info' section includes fields for 'Start Date\*' (set to '2017-08-31'), 'End Date', 'Start Time \*' (set to '10:00 AM'), 'End Time \*' (set to '08:00 PM'), and 'Days of Week' (all days are checked). The 'Targets' section shows a list of target categories: 'Total', 'All Flower', 'All Concentrate', 'All Edibles', 'All Other', and 'Specific Items'. The 'Submit' button is green and the 'Clear' button is red.

Figure 4.1: Blank new coupon

The screenshot shows the 'Add New Coupons' form with the 'All Concentrate' target selected. The 'Targets' section now displays '2 Items' below the target category list. The 'Basic Info' section includes fields for 'Name \*', 'Discount \*', 'Quantity' (set to '1/2 (g)'), and 'Max' (set to 'Unlimited'). The 'Date Info' section includes fields for 'Start Date\*' (set to '2017-08-31'), 'End Date', 'Start Time \*' (set to '10:00 AM'), 'End Time \*' (set to '08:00 PM'), and 'Days of Week' (all days are checked). The 'Submit' button is green and the 'Clear' button is red.

Figure 4.2: Blank new coupon targeted at all concentrates



Search  Store Name

### Add New Coupons

[Submit](#) [Clear](#)

#### Basic Info

Name \*

Discount \*  \$

Quantity  Max

#### Date Info

Start Date\*  End Date

Start Time \*  End Time \*

Days of Week

☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒ Sunday

#### Targets

☐ Total ☐ All Flower ☐ All Concentrate ☐ All Edibles ☐ All Other ☐ Specific Items

2 Items

#### Specific Items

Show  entries Search:

Name	Type	Strain Type	Profit
Banana OG	Flower	H	\$39.83333333
Nectarine	Concentrate	H	\$87.6
Gorilla Glue	Concentrate	I	\$0

Showing 1 to 3 of 3 entries Previous  Next

Figure 4.3: Blank new coupon targeted at specific items

Search  Wax Wednesday Store Name

### Wax Wednesday

[Generate Message](#) [Delete](#)

#### Basic Info

Name: Wax Wednesday

Add Date: 2017-08-25

Discount: \$10

Quantity: 1

Max: Unlimited

#### Date Info

Start Date: 2017-08-25

End Date: 2017-09-30

Start Time: 10:00 AM

End Time: 08:00 PM

Days of Week: Wednesday/Saturday

#### Current Items

Show  entries Search:

Name	Type	Strain Type	Profit
Nectarine	Concentrate	H	\$87.6
Gorilla Glue	Concentrate	I	\$0

Showing 1 to 2 of 2 entries Previous  Next

#### Performance

Sales for On-Sale Products

Figure 4.4: Info for Wax Wednesday

The screenshot shows a web application interface for creating a new message. The top navigation bar includes a search bar and a 'Store Name' label. The left sidebar contains navigation links: 'New Coupon', 'Coupon Info', 'New Message' (which is highlighted), and 'Message Info'. The main content area is titled 'New Message' and contains three primary sections. The 'Basic Info' section has a 'Name' input field, a 'Type' dropdown menu with radio button options for 'SMS/MMS' and 'Email', and a 'Coupon' dropdown menu. The 'Target Audience' section features radio buttons for 'All', 'Flower', 'Concentrate', 'Edible', and 'Other', a 'Size' field with the value '2', and a 'Cost' field with the value '\$0.015'. The 'Message' section includes a large text area for the message content and an 'Image' upload field with a 'Browse...' button. At the top right of the form, there are three buttons: 'Submit' (green), 'Send Test' (green), and 'Clear' (red).

Figure 4.5: New Text Message

## 4.2 Messages

### 4.2.1 New Messages

To send a new message out to patients you are required to enter:

- A name
- Message type (text or email)
- Audience (based on patient preferences)
- The message
- If you send an email a subject is required

### 4.2.2 Message Info

You can review the info about past messages by selected the message in the search box at the top. This will give you basic info about the message like when it was sent, to whom, and its content. There is also a graph of daily sales of the patients who were messaged, which makes it easy to check whether the message let to a noticable increase in sales.

Search Store Name

### New Message

Submit Send Test Clear

#### Basic Info

Name \*

Type\* ☒ SMS/MMS ☐ Email

#### Target Audience

☒ All ☐ Flower ☐ Concentrate ☐ Edible ☐ Other

Size 1 Patients Cost \$0.0005

#### Message

Subject \*

Message

Image  No file selected

Figure 4.6: New Email

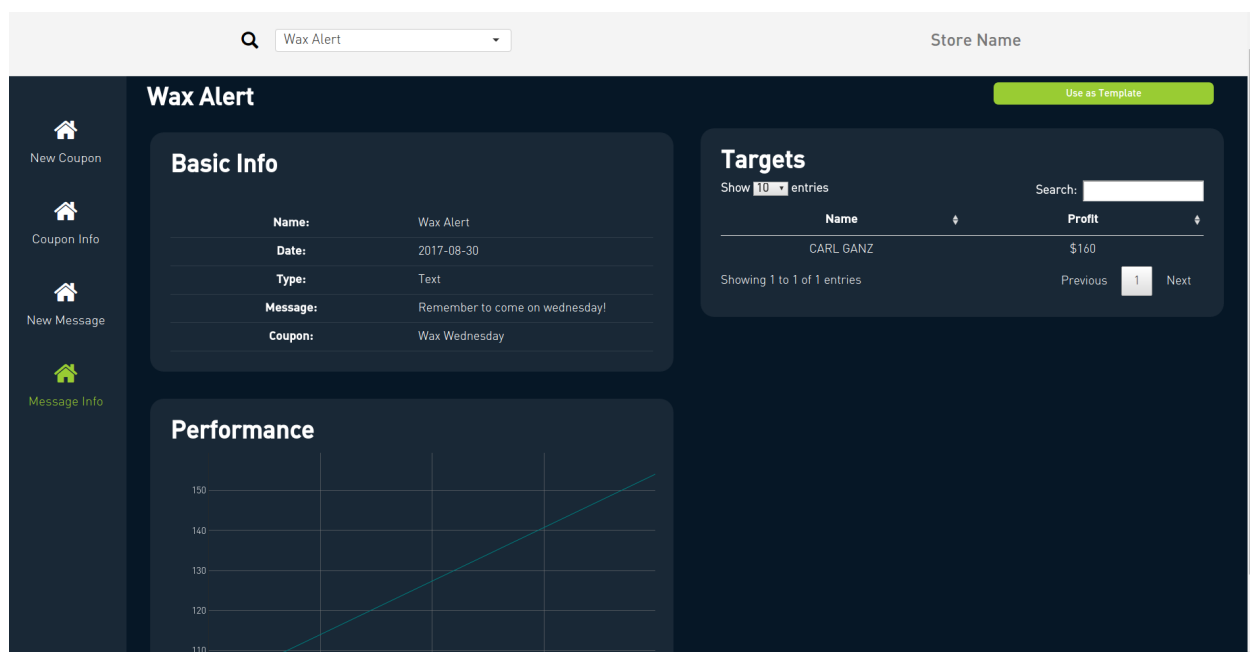


Figure 4.7: Message Info for Wax Alert



## Chapter 5

# Point of Sales