



Integrating Traditions for Wellness

Welcome to our herbal pharmacy ordering software

Use this guide to learn how to customize your practitioner profile in settings, understand our payment, return & shipping policies, and support your patients in using our herbal pharmacy.

If you are a new or returning practitioner, we have a few updates for 2024:

- We no longer operate in Oakland, California. Our new home base is in Nevada County, California, and we offer shipping nationwide (but not to US territories or international shipping).
- Our new phone number is 530-270-0644 extension 2.
- We no longer offer bulk Western or Chinese herbs through our custom herbal pharmacy.
- If you are a Bay Area practitioner and you or your patients wish to pick up formulas in person, contact [The Herbal Ritual Apothecary](#) or call 510-923-0178. They do offer bulk Western herbs but do not offer shipping.

Please refer to our illustrated “How To” guide for information on building custom herbal formulas. The “Help” icon within Dispensary Tree also contains more information on all of our policies and settings. For additional questions or to set up a meeting for individualized support, please email pharmacy@fiveflavorsherbs.com or call 530-270-0644 extension 2.

I. Dispensary Tree Settings

A. Profile Settings

1. **Basic Info:** Set your name and contact information as you would like them to be displayed on your orders. You can add a picture of yourself or your practice logo for customization.
2. **Addresses:** Include your home, business, and/or another shipping address. Select your default address. This address will be given to patients should they request it, as well as be the address that automatically appears when you want an order shipped to your own address.
3. **Password:** Your password is the one you created when you registered for your account. If you forget or would like to reset your password, you may do so under your profile settings, or email pharmacy@fiveflavorsherbs.com.

B. Formula Settings

1. **General:** You can control your Defaulted Formula Name, decide how you would like to use your keyboard tab key, and select a default number of herb rows that appear on the Formula Builder screen.
2. **Granules & Tinctures Settings:** Take a look and customize the display options if you'd like.

C. Refill Settings: The default setting is to make refills be set as you build the formula, but here you can decide if you'd like to make all or none of your formulas available for refill, determine how many refills are available to a patient, and manage how many days must pass before someone is able to order a refill. Refills are great because your patient will not need any action on your part to order a refill. They will only need to log in to their account and pay for the formula. If you need to set a default refill setting, you can always adjust refills at the time of order.

D. Graphic Settings: Add your logo to appear on labels and info sheets to customize your prescriptions for your practice. Please be sure to use the highest quality resolution image file available.

E. Payment Settings

1. **Manage Credits:** Review your orders, see if you obtained any credits for those orders and decide if and how much of your credit you would like to cash out vs use these funds to pay for products when placing orders. Credit cash out requests are processed monthly (see more details below).
2. **Credit Cards:** Securely save your payment method to your account.
3. **Practitioner Markup:** If you turn this feature on, you will select if you would like a percentage or a flat fee to all of your formulas. No matter what your default setting is, this can always be adjusted in your cart.
4. **Vouch Settings:** Approved practitioners with a stored payment method on file can push orders through to be made by our pharmacy before a patient has paid for their order by "vouching" for the patient. If the patient never pays for or picks up their formula, your card will be charged for the formula 30 days after vouching. To apply for vouch status, or read more about how vouching works, please visit the Vouch Settings Tab.

F. Checkout Settings:

1. **Payment settings:** Set your default to "patient pays" or "practitioner pays"
2. **Shipping Selection:** Select your default to "ship to patient" or "ship to practitioner." PLEASE NOTE, PICK UP IS NO LONGER AN OPTION.

II. Policies

A. **Security:** Our Dispensary Tree software protects your and your patients' data with our 24 hour monitored HIPAA compliant servers. Our email is NOT HIPAA compliant, so please do not include protected health information in the body of an email.

- B. **Prices and Fees:** Prices are subject to change without notice.
- C. **Staff Entry Fee:** We prefer that practitioners enter their own formulas to save our staff time. We charge a flat \$5 fee for every formula submitted via email for our staff to input. We do not accept phone orders. The fee is added to your formula on the formula builder page. It will be the responsibility of the paying party (you or the patient) to pay it along with paying for the herbal prescription.
- D. **Practitioner Markups and Pharmacy Credits** We know that formulating is a valuable use of your time as a practitioner. Thus our pharmacy software allows you to charge an extra fee or percentage for the formulas you create. We recommend markups be no more than 5-20% of the formula price, or a comparable flat rate based on the bottle size.

To use this feature, we first require that you complete a W-9. Please contact accounting@fiveflavorsherbs.com to receive a fillable form through DocuSign. Your markup is called a Pharmacy Credit, and the IRS considers this credit a dividend that must be reported on taxes if you receive \$600 or more in one year.

Credits are cashed out by request, or you may use them as credit to purchase products for yourselves. Using credits to purchase products on the pharmacy platform exempts you from having to pay income tax on your dividends. Credits cannot be applied to other Five Flavors Herbs purchases i.e. web or custom wholesale orders.

To request a payout, please email accounting@fiveflavorsherbs.com. Once approved, we will send you payment through Bill.com by check or direct deposit. We no longer use Paypal for Pharmacy Credit payouts.

- E. **Currency:** All prices and fees are stated in US dollars.
- F. **Payment Terms:** The user (whether a patient or practitioner) is bound and obligated to the transaction by clicking the “pay now” button. The transaction may come with additional terms expressed on the Website that are transaction specific. The additional terms will also govern the transaction. When you make a payment, you authorize us to charge the full amount to the payment source for the transaction.

You are responsible for and agree to pay for all reversals, charge-backs, claims, fees, fines, penalties and any other liabilities incurred by us that arise out of any payments for transactions authorized by you.

- G. **Payment Source:** Upon providing an acceptable payment source, you confirm that you are authorized to use that payment source. Any and all information collected pertaining to the transaction and/or payment source shall be in accordance with our Privacy Policy.

- H. **Shipping:** We ship through USPS and UPS. Shipping fees are based upon weight of product and delivery location, and are non-refundable. Shipping rates are subject to change without notice. If you are placing a large order or one that contains an 8 or 16 oz bottle, please choose UPS.
- I. **Return and Refund Restrictions:** All custom pharmacy transactions are final. Pharmacy orders of finished/sealed products may be returned if done so within thirty (30) days from the date they were originally shipped to the customer or made available for pick up, and if the product is in its original form without broken seals. All authorized returns are subject to a 3% restocking fee.

Shipping and Handling charges are not refundable and the cost of returning the item to us is the sole responsibility of the customer. We reserve the right to not accept any return that does not follow the aforementioned guidelines stated. You will be responsible for all expenses relating to the return of the order unless the incorrect order was sent, the order was sent to the incorrect address or the order was not properly packaged resulting in product damage.

If you believe that an unauthorized transaction has taken place or if you have any questions concerning this policy, please contact us via email at pharmacy@fiveflavorsherbs.com or all 530-270-0644 x2.

III. **Sales Tax**

- A. Dietary supplements, including custom herbal formulas, are taxable in California. We collect California Sales Tax when applicable.
- B. Tax exempt status: If you are a practitioner with a Resale Certificate who pays for your patient's formulas and then collects sales tax from your patients, you are eligible to be "Tax Exempt" in Dispensary Tree. Please note that Sales Tax Exemption forms and rules are different for each state. Please contact accounting@fiveflavorsherbs.com to request tax exemption and include what state you do business in.

IV. **Supporting your patients in using the pharmacy**

- A. **Patient Portal** Patients can register for their own patient portal, where they can request refills and see past formulas. If a refill is not available, you will be contacted to authorize a refill. We do not authorize patient requests for refills unless refills are approved by their practitioner.
- B. **Patient Payments** Patients will pay for their formulas online using a payment link that you will send to them when submitting your order. This link can be sent by email, text, or both, so please be sure to capture all of the correct contact information for your patient in their profile and find out how they would like to receive the payment link.

- C. **Vouching** We do *not* begin filling your formulas until your patient has paid for their order. However, if you would like our staff to start filling your formula right away, you do have the option to vouch for their formula, which indicates that they will pay later. If your patient does not pay for their formula within 30 days after you have vouched for it, we will process payment using your stored credit card.
- D. **Order Status and Delivery** Once payment is received, or the order has been vouched for, our Pharmacy Technicians will start making the formula. Orders are usually ready within one business day of receiving payment; if we anticipate a delay, we will contact you and the patient by phone and email. When the order is complete, the receiving party will be emailed a package tracking number when the shipping label is printed.
- E. **Refills:** Five Flavors Herbs will not authorize a refill for a custom formula unless you have allowed refills. If a patient requests a formula that no longer has refills, we will direct them to the practitioner to refill or not.
- F. **Unpaid orders:** After a practitioner places an order, we remind patients by text and email once weekly for three times. If, after 8 weeks, they have not paid for their order, the order will be canceled. If you wish to re-order the formula, it will be saved in your account.