

Volume

5

BIO-TECH MEDICAL SOFTWARE, INC.  
BIOTRACKTHC TRACEABILITY SYSTEM  
LICENSEE MANUAL FOR PRODUCERS



**LICENSEE MANUAL**  
**PRODUCERS**

BIO-TECH MEDICAL SOFTWARE, INC.

# **BioTrackTHC Traceability System Licensee Manual for Producers**

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## Chapter 1: User Access

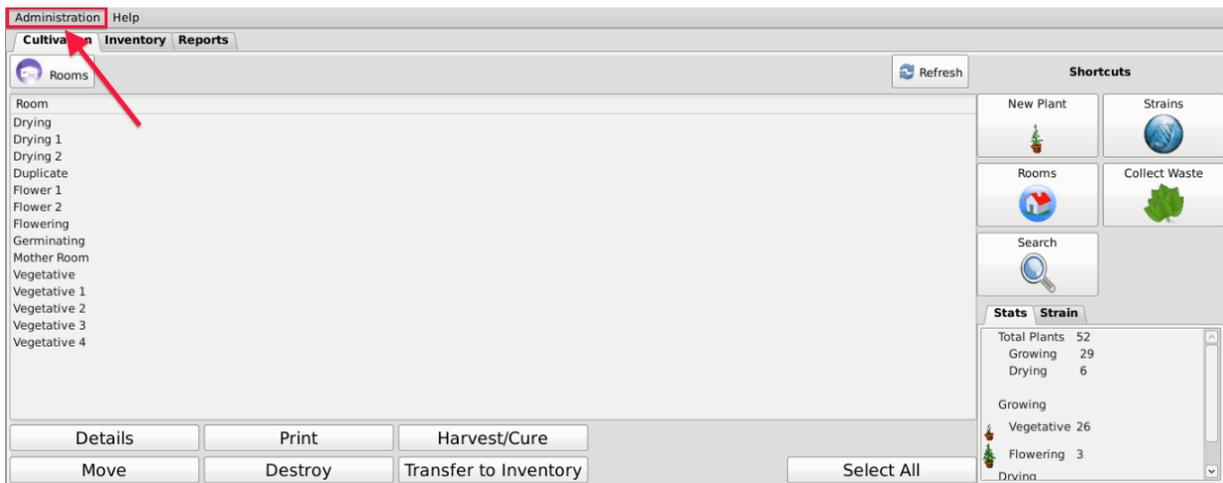
In this chapter, you will learn how to:

- ✓ Add, modify and remove user access to the Traceability System

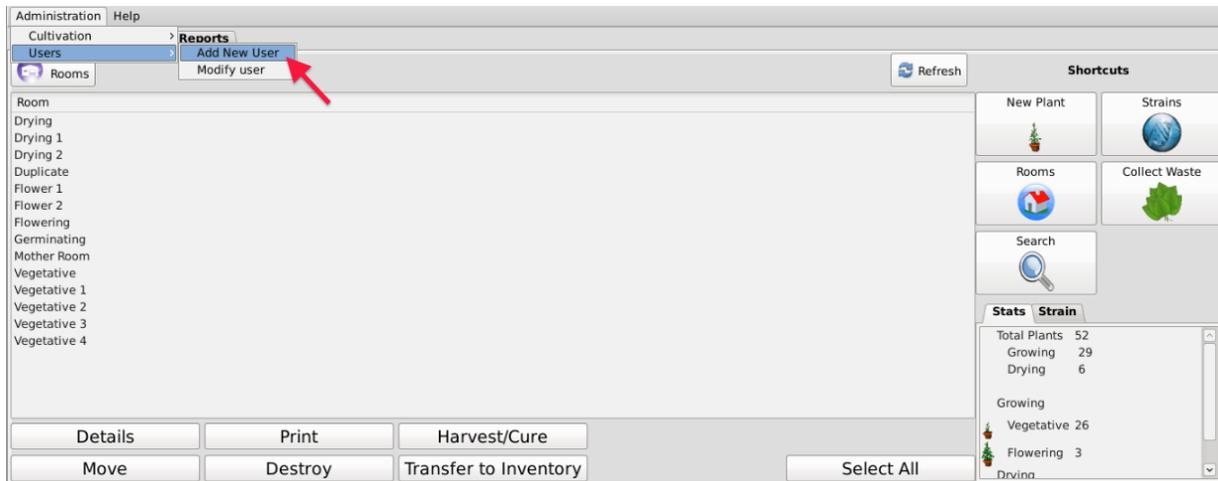
In addition to the login credentials, the Traceability System allows each licensee the ability to grant system access to additional users for data submission on your behalf. Please be aware that this is distinct from employees as defined in Chapter 2: Employees (e.g., not all employees need to be given user access to the Traceability System) and so adding users is not the same as adding employees.

### Adding New Users

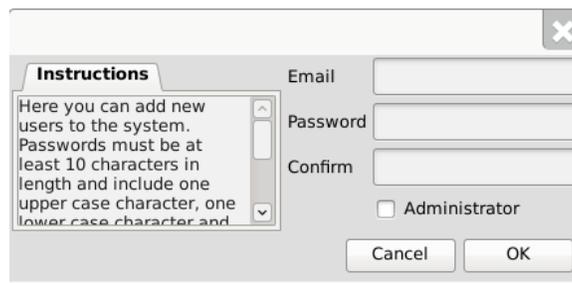
- To add new users into the system, click on the Administration menu near the top left corner of the window.



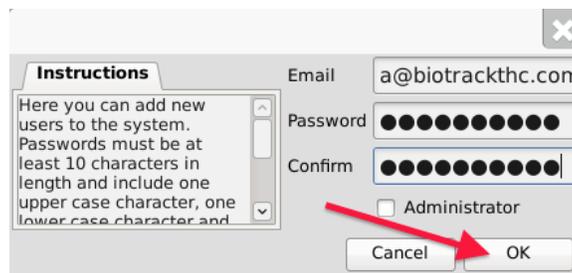
- Hover the cursor over “Users” and then click on “Add New User”.



- This will bring up the New User screen.



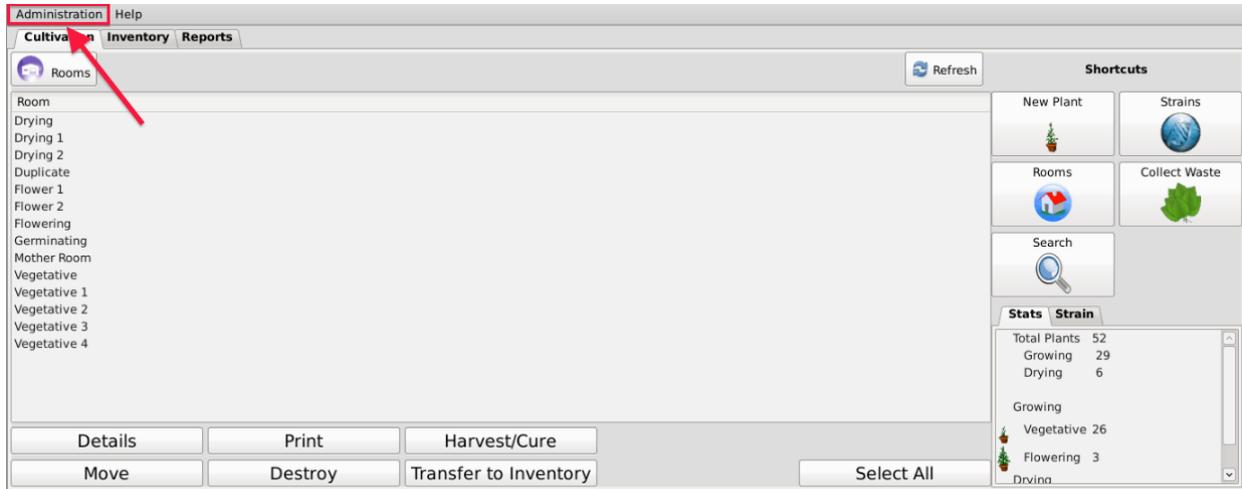
- Within the Email text box, type the email address of the new user being granted access.
- Within the Password text box, enter the new user's initial password.
  - **NOTE: the password must be at least ten (10) characters in length and must include one upper case character, one lower case character, and one number.**
- Click on the Administrator check box if the user is to have the ability to add/modify/delete other users.



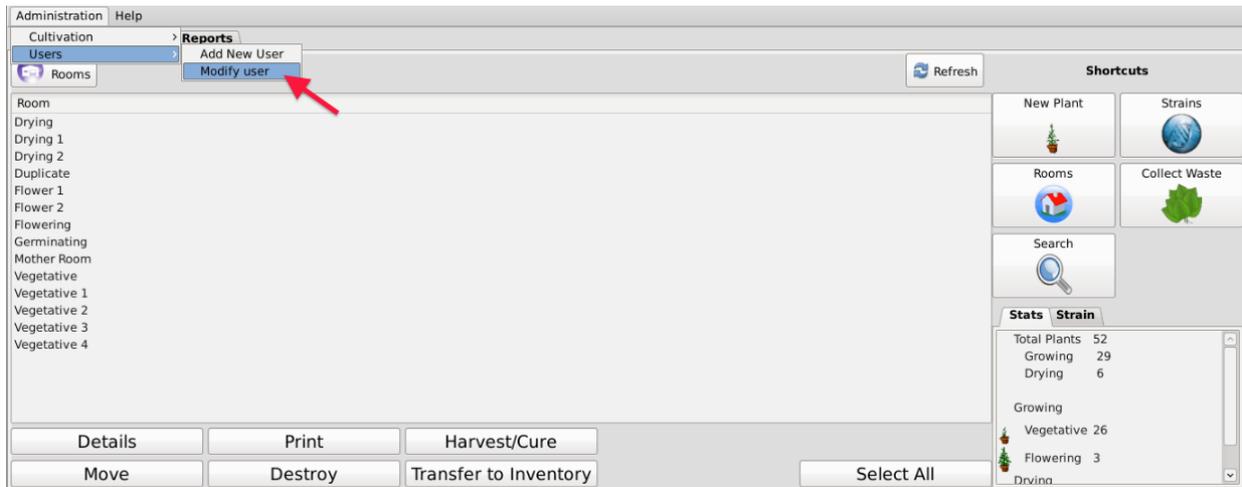
- Click on the "OK" button when complete.

## Modifying an Existing user

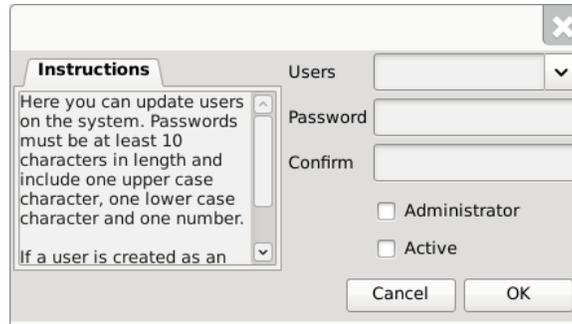
- To modify users previously given access to the system, click on the Administration menu near the top left corner of the window.



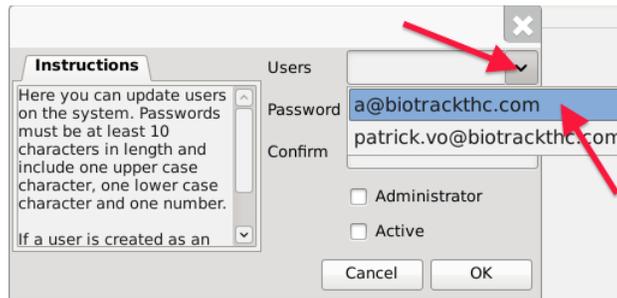
- Hover the cursor over “Users” and then click on “Modify User”.



- This will bring up the Modify User screen.



- Select the user to be modified from the Users drop down



- You may modify the following:
  - Password. The password associated with the user.
  - Addministrator. Checked (unchecked) box indicates the user is able (is not able) to add/modify/delete other users.
  - Active. Checked (unchecked) box indicates the user's access is on (off). If you are revoking a user's access to the Traceability System, make sure that this is unchecked.
- Click on the "OK" button when complete.

## Chapter 2: Employees

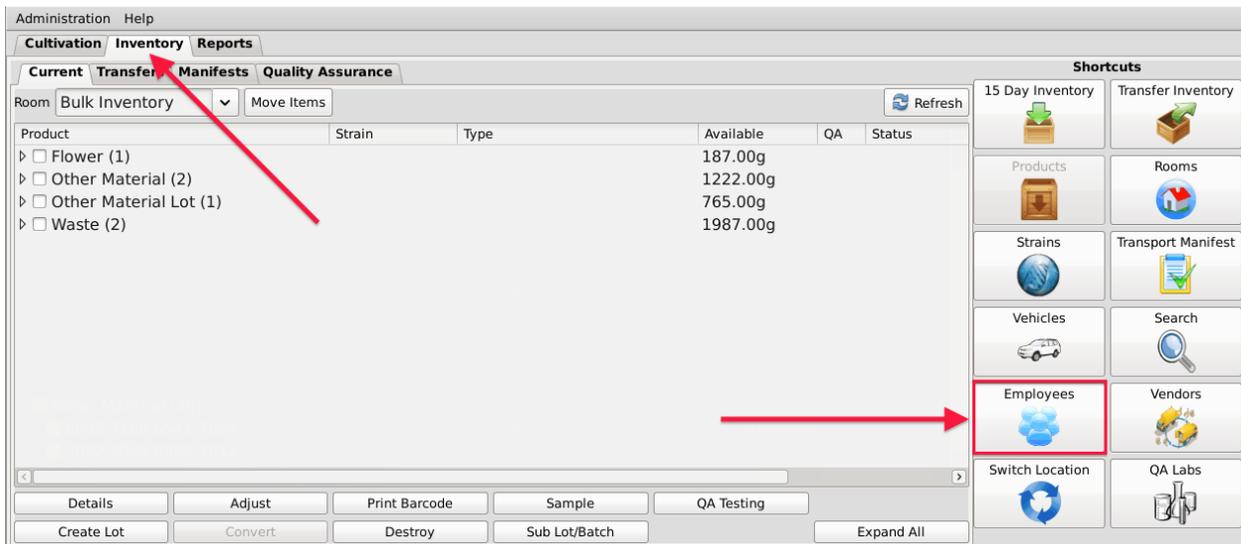
In this chapter, you will learn how to:

- ✓ Add, modify and remove employees

### Accessing the Employee Screen

To add new employees, view or change the information of existing employees, or delete employees no longer needed, you will need to access the Employee screen.

- Navigate to the “Inventory” tab found in the top-left corner of the screen, and then click on the “Employees” button located on the right-hand side of the home screen.

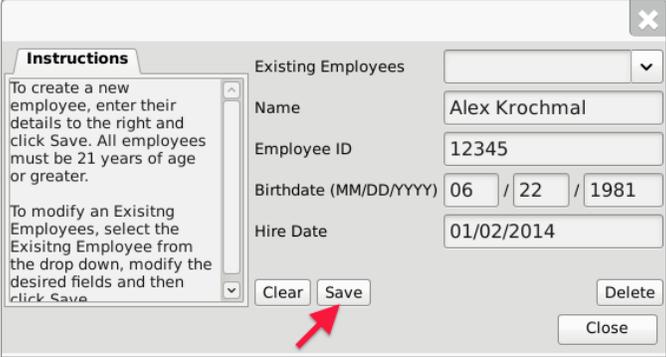


- This will bring up the Employee screen.

The screenshot shows the "Employee" screen. It features an "Instructions" panel on the left with the following text: "To create a new employee, enter their details to the right and click Save. All employees must be 21 years of age or greater. To modify an Existing Employee, select the Existing Employee from the drop down, modify the desired fields and then click Save." To the right of the instructions is a form with the following fields: "Existing Employees" (a dropdown menu), "Name" (a text input field), "Employee ID" (a text input field), "Birthdate (MM/DD/YYYY)" (a date input field with slashes), and "Hire Date" (a text input field). At the bottom of the form are buttons for "Clear", "Save", "Delete", and "Close".

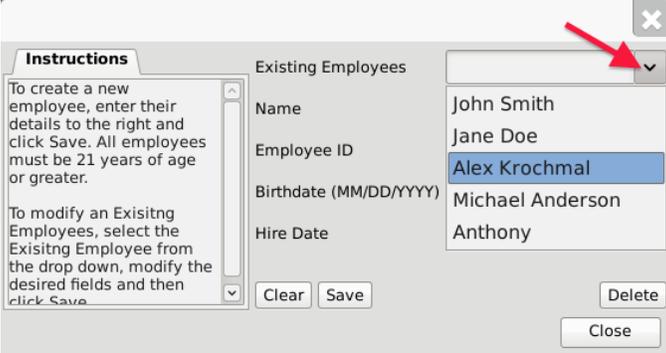
## Add a New Employee

- From the Employee screen, click on the “Clear” button to clear all fields and enter the following information:
  - Name: Enter the employee’s full name.
  - Employee ID: Enter a unique identification number for the employee. This is not a number assigned by the Traceability System, but is internal to your business. You may use payroll ID, driver license number, or any other numbering system you see fit so long as each employee’s number is unique and not to be re-used within your UBI.
  - Birth date: Enter the employee’s date of birth. Must be in the format of MM/DD/YYYY.
  - Hire Date: Enter the employee’s date of hire.
- Click on the “Save” button once all of the required data has been entered.



The screenshot shows a dialog box titled "Add a New Employee". On the left, there is an "Instructions" tab with text: "To create a new employee, enter their details to the right and click Save. All employees must be 21 years of age or greater." and "To modify an Existing Employee, select the Existing Employee from the drop down, modify the desired fields and then click Save." On the right, there is a form with the following fields: "Existing Employees" (a dropdown menu), "Name" (text box with "Alex Krochmal"), "Employee ID" (text box with "12345"), "Birthdate (MM/DD/YYYY)" (text boxes with "06 / 22 / 1981"), and "Hire Date" (text box with "01/02/2014"). At the bottom, there are "Clear", "Save", "Delete", and "Close" buttons. A red arrow points to the "Save" button.

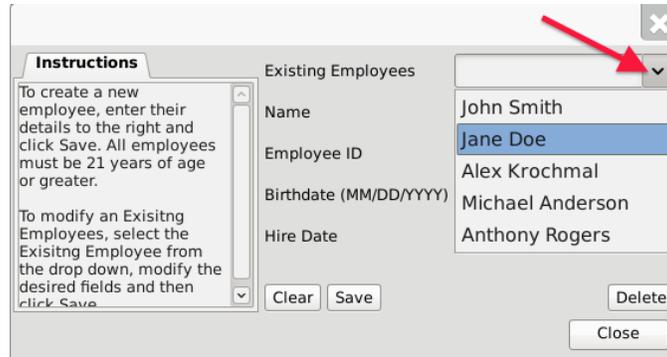
- The new employee will now appear within the Existing Employees drop down for selection.



The screenshot shows the same dialog box as above, but the "Existing Employees" dropdown menu is open, displaying a list of names: "John Smith", "Jane Doe", "Alex Krochmal" (which is highlighted in blue), "Michael Anderson", and "Anthony". A red arrow points to the dropdown arrow icon.

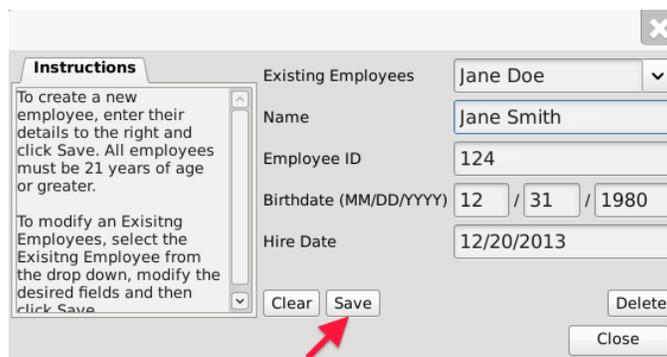
## Modifying an Existing Employee

- From the Employee screen, select the employee to be modified from the Existing Employees drop down.



The screenshot shows a web form for modifying an existing employee. On the left, there is an 'Instructions' panel with two paragraphs of text. The main form area has a section titled 'Existing Employees' with a dropdown menu. A red arrow points to the dropdown arrow. The dropdown menu is open, showing a list of names: John Smith, Jane Doe (highlighted in blue), Alex Krochmal, Michael Anderson, and Anthony Rogers. Below the dropdown are fields for Name, Employee ID, Birthdate (MM/DD/YYYY), and Hire Date. At the bottom right are buttons for Clear, Save, Delete, and Close.

- Once selected, the employee's information will automatically appear within their respective fields.
- Modify the necessary field/s (in the example below, Jane Doe changed her last name to Jane Smith).



The screenshot shows the same web form as above, but now the 'Existing Employees' dropdown is set to 'Jane Doe'. The form fields are populated with her information: Name is 'Jane Smith', Employee ID is '124', Birthdate is '12 / 31 / 1980', and Hire Date is '12/20/2013'. A red arrow points to the 'Save' button at the bottom of the form.

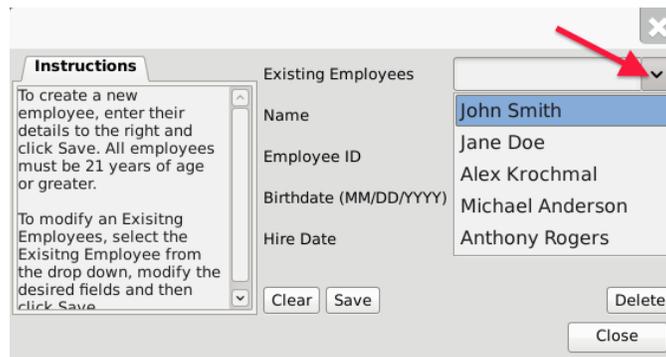
- Click on the "Save" button when complete.

## Deleting an Existing Employee

If you find that an existing employee is no longer needed (e.g., employee is terminated, employee record was created in error, etc...) you may delete the employee record.

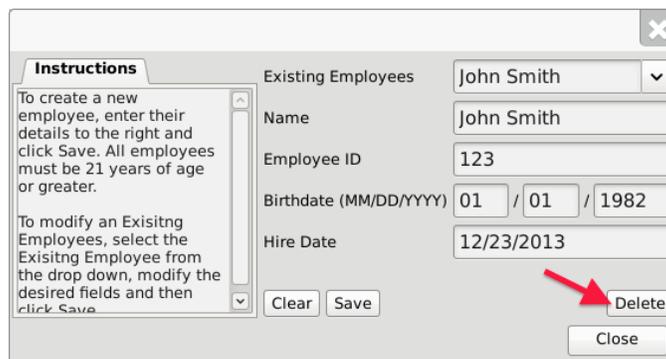
**NOTE: Removing an employee does not delete any of the already submitted Traceability System data associated with that employee record. It simply removes the employee record from use moving forward.**

- From the Employee screen, select the employee to be deleted from the Existing Employee drop down.



The screenshot shows a web application window titled 'Existing Employees'. On the left, there is an 'Instructions' panel with two paragraphs of text. The main area contains a dropdown menu labeled 'Existing Employees' with a red arrow pointing to it. The dropdown is open, showing a list of names: 'John Smith', 'Jane Doe', 'Alex Krochmal', 'Michael Anderson', and 'Anthony Rogers'. Below the dropdown are input fields for 'Name', 'Employee ID', 'Birthdate (MM/DD/YYYY)', and 'Hire Date'. At the bottom, there are 'Clear', 'Save', and 'Delete' buttons, and a 'Close' button at the very bottom right.

- Once selected, the employee's information will automatically appear within their respective fields.



The screenshot shows the same 'Existing Employees' form, but now the dropdown menu is closed and the selected employee's information is populated in the input fields. The 'Name' field contains 'John Smith', 'Employee ID' contains '123', 'Birthdate (MM/DD/YYYY)' contains '01 / 01 / 1982', and 'Hire Date' contains '12/23/2013'. A red arrow points to the 'Delete' button at the bottom right.

- Click on the "Delete" button.

## Chapter 3: Vehicles

In this chapter, you will learn how to:

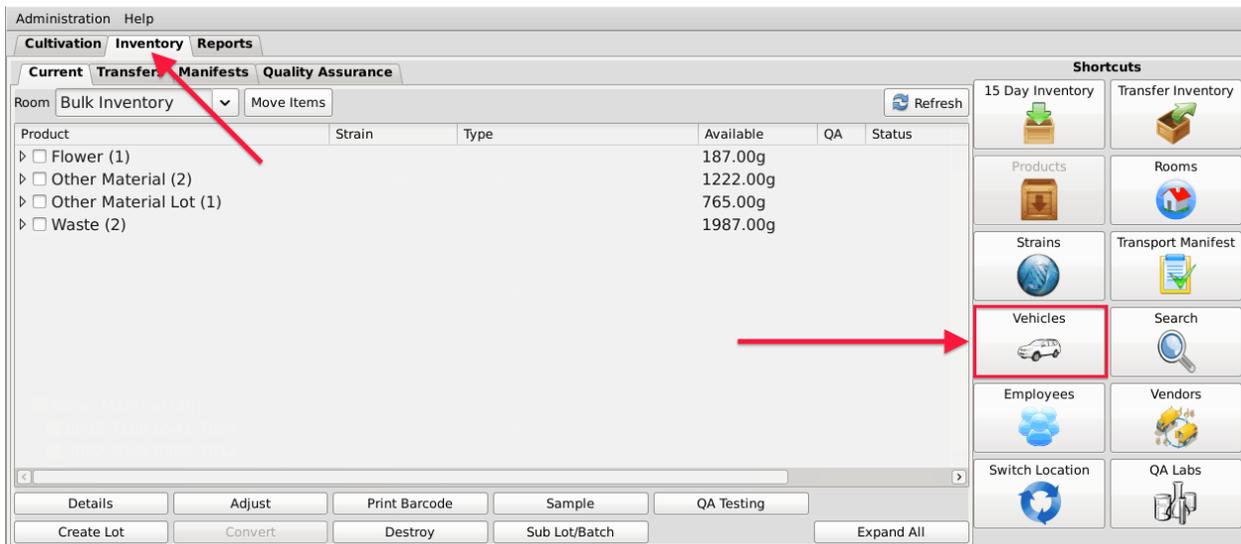
- ✓ Add, modify and remove company vehicles

The Traceability System requires that you record accurate information regarding the company vehicles that will be transporting marijuana or marijuana product because this information will be required for the completion of Transportation Manifests.

### Accessing the Vehicle Screen

To add new vehicles, view or change the information of existing vehicles, or delete vehicles no longer needed, you will need to access the Vehicle screen.

- Navigate to the “Inventory” tab found in the top-left corner of the screen, and then click on the “Vehicles” button located on the right-hand side of the home screen



- This will bring up the Vehicle screen.

### Add a New Vehicle

- From the Vehicle screen, click on the “Clear” button to clear all fields and enter the following information:
  - Nickname: Enter a unique nickname with which you may easily identify the vehicle within the system
  - Color: Enter the vehicle’s color
  - Make: Enter the vehicle’s make
  - Model: Enter the vehicle’s model
  - Year: Enter the vehicle’s year
  - Plate #: Enter the vehicle’s license plate number
  - VIN #: Enter the vehicle’s VIN. Note that VINs are 17 digits for all vehicles post-1981. Prior to 1981, the VIN can be between 10 and 17 digits.
- Click on the “Save” button once all of the required data has been entered.

- The new vehicle will now appear within the Existing Vehicles drop down for selection.

**Instructions**  
To create a new vehicle, simply click New. Then give the vehicle a nickname and enter the Color, Make, Model, Year, License Plate and VIN of the vehicle. Click Save when you have finished.

Existing Vehicles  

Nickname

Color

Make

Model

Year

Plate #

VIN #

### Modifying an Existing Vehicle

- From the Vehicle screen, select the vehicle to be modified from the Existing Vehicles drop down.

**Instructions**  
To create a new vehicle, simply click New. Then give the vehicle a nickname and enter the Color, Make, Model, Year, License Plate and VIN of the vehicle. Click Save when you have finished.

Existing Vehicles  

Nickname

Color

Make

Model

Year

Plate #

VIN #

- Once selected, the vehicle's information will automatically appear within their respective fields.
- Modify the necessary fields (in the example below, Van 1 changed color from White to Green).

The screenshot shows a web-based form for creating a new vehicle. On the left, there is an 'Instructions' box with the text: 'To create a new vehicle, simply click New. Then give the vehicle a nickname and enter the Color, Make, Model, Year, License Plate and VIN of the vehicle. Click Save when you have finished.' The form fields are as follows: 'Existing Vehicles' is a dropdown menu with 'Van 1' selected; 'Nickname' is 'Van 1'; 'Color' is 'Green'; 'Make' is 'Chevy'; 'Model' is 'Astro'; 'Year' is '1998'; 'Plate #' is 'XYZABC'; and 'VIN #' is 'ABCDE1AB2EFG11111'. At the bottom of the form, there are four buttons: 'Clear', 'Save', 'Delete', and 'Close'. A red arrow points to the 'Save' button.

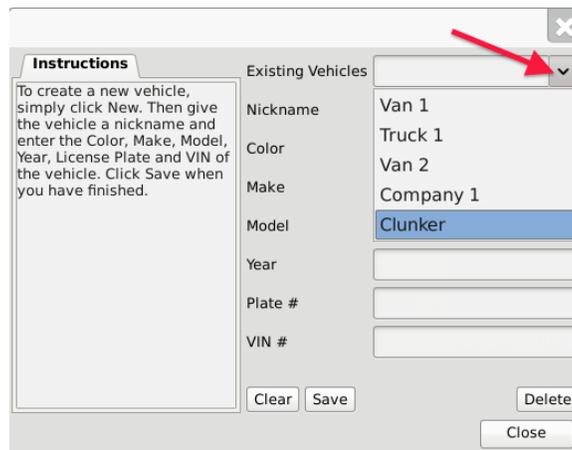
- Click on the “Save” button when complete.

## Deleting an Existing Vehicle

If you find that an existing vehicle is no longer needed (e.g., vehicle is sold, vehicle record was created in error, etc...) you may delete the vehicle record.

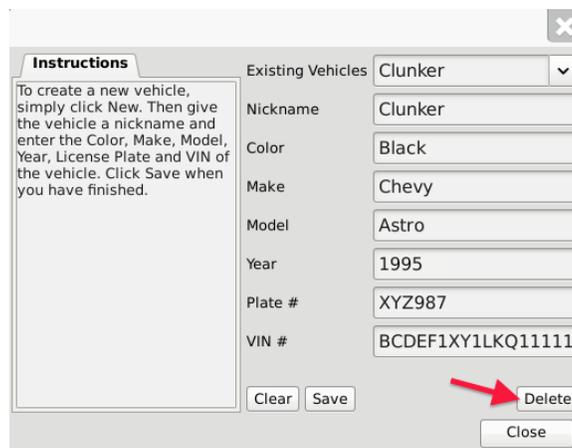
**NOTE: Removing a vehicle does not delete any of the already submitted Traceability System data associated with that vehicle record. It simply removes the vehicle record from use moving forward.**

- From the Vehicle screen, select the vehicle to be removed from the Existing Vehicles drop down



The screenshot shows a web form for creating a new vehicle. On the left, there is an 'Instructions' box with text: 'To create a new vehicle, simply click New. Then give the vehicle a nickname and enter the Color, Make, Model, Year, License Plate and VIN of the vehicle. Click Save when you have finished.' To the right, there are input fields for 'Existing Vehicles', 'Nickname', 'Color', 'Make', 'Model', 'Year', 'Plate #', and 'VIN #'. The 'Existing Vehicles' dropdown menu is open, showing a list of options: 'Van 1', 'Truck 1', 'Van 2', 'Company 1', and 'Clunker'. The 'Clunker' option is highlighted in blue. A red arrow points to the dropdown arrow icon. At the bottom of the form are buttons for 'Clear', 'Save', 'Delete', and 'Close'.

- Once selected, the vehicle's information will automatically appear within their respective fields.



The screenshot shows the same web form as above, but now the 'Existing Vehicles' dropdown is set to 'Clunker'. The other input fields are populated with the following information: 'Nickname' is 'Clunker', 'Color' is 'Black', 'Make' is 'Chevy', 'Model' is 'Astro', 'Year' is '1995', 'Plate #' is 'XYZ987', and 'VIN #' is 'BCDEF1XY1LKQ11111'. A red arrow points to the 'Delete' button at the bottom right of the form. The 'Close' button is also visible.

- Click on the "Delete" button.

## Chapter 4: Vendors

In this chapter, you will learn how to:

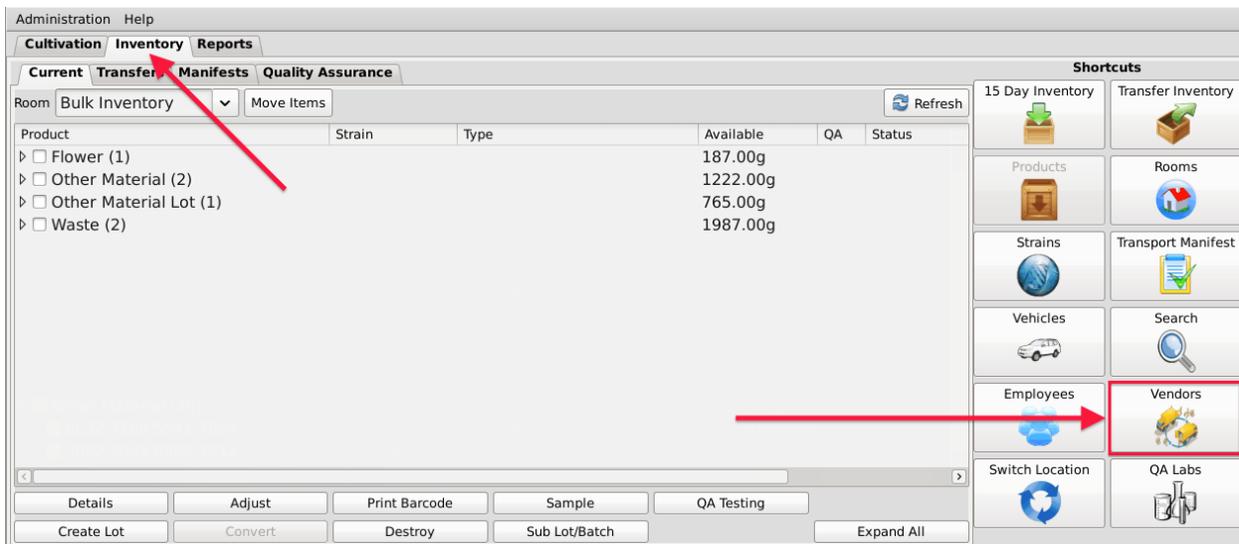
- ✓ View Preferred Vendor List
- ✓ Search for and Add Vendors to Preferred Vendor List
- ✓ Remove Vendors from Preferred Vendor List
- ✓ Add Vendors manually (only available in systems without a preferred list)
- ✓ Remove Vendors from a Manual Vendor List

Within the Traceability System, vendors are Licensees outside of your own that you can either wholesale to or make wholesale purchases from. You must add vendors to your Preferred Vendor List in order to receive inbound shipments, to make outbound shipments, and to account for samples given to negotiate a sale. In certain systems there is no preferred list (there will be no button for preferred vendor list under the preferred list in these systems) so vendors will need to be added manually in these systems.

### Accessing the Vendor Screen

To view all possible vendors, add vendors to your Preferred Vendor List, or remove vendors from your Preferred Vendor List, you will need to access the Vendor screen.

- Navigate to the “Inventory” tab found in the top-left corner of the screen, and then click on the “Vendors” button located on the right-hand side of the home screen



- This will bring up the Vendor Information screen.

**Instructions**

To add a Vendor to your Vendors List, click on Vendor List.  
 To Delete a Vendor from your Vendor List select the Vendor from the Existing Vendors drop down and then click on Delete.

Existing Vendors

Name

Address 1  Address 2

City  State  Zip

Phone  Fax

Email  Website

License Number  Contact

Preferred Vendor List  Type

### Viewing Vendor Information

- The detailed information of Licensees that are on your Preferred Vendors List (i.e., those you have indicated that you do business with) may be found in the Existing Vendors drop down. Be aware that the drop down will start empty and you will need to add vendors per the instructions below.

**Instructions**

To add a Vendor to your Vendors List, click on Vendor List.  
 To Delete a Vendor from your Vendor List select the Vendor from the Existing Vendors drop down and then click on Delete.

Existing Vendors

Name

Address 1

City  State  Zip

Phone  Fax

Email  Website

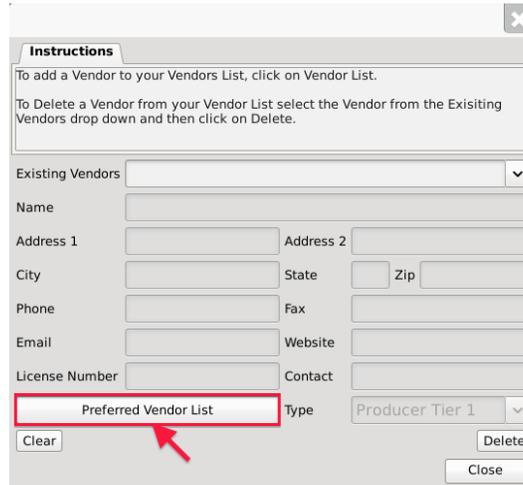
License Number  Contact

Preferred Vendor List  Type

- Once selected, the vendor's information will automatically appear within their respective fields.

## Accessing the Preferred Vendor List

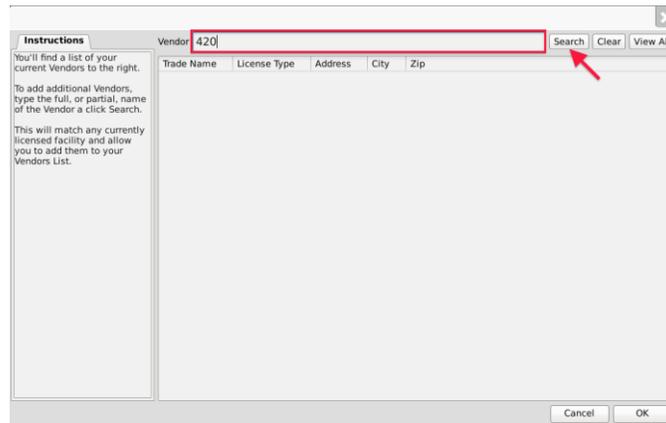
- From the Vendor Screen, click on the “Preferred Vendor List” button to add or remove other approved Licensees that you do business with.



The screenshot shows a window titled "Instructions" with a close button (X) in the top right corner. Below the instructions, there is a dropdown menu for "Existing Vendors". The form contains several input fields: "Name", "Address 1", "Address 2", "City", "State", "Zip", "Phone", "Fax", "Email", "Website", "License Number", and "Contact". At the bottom, there is a "Preferred Vendor List" button highlighted with a red box and a red arrow pointing to it. Other buttons include "Clear", "Delete", and "Close".

## Add a Vendor

- From the Preferred Vendor List, enter the full or partial business name into the search bar and click the “Search” button.



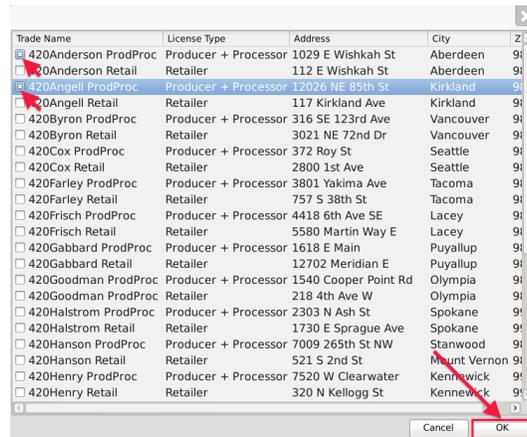
The screenshot shows a window titled "Instructions" with a close button (X) in the top right corner. Below the instructions, there is a search bar with the text "420" entered. To the right of the search bar are buttons for "Search", "Clear", and "View All". The "Search" button is highlighted with a red box and a red arrow pointing to it. Below the search bar, there is a table with columns for "Trade Name", "License Type", "Address", "City", and "Zip".

- Alternatively, you may click “View All” to view the entire population of Licensees.

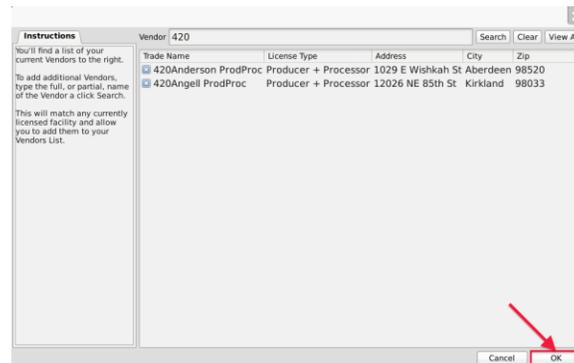


This is a close-up screenshot of the search bar area. It shows the "Vendor" input field, the "Search" button, the "Clear" button, and the "View All" button. The "View All" button is highlighted with a red box and a red arrow pointing to it.

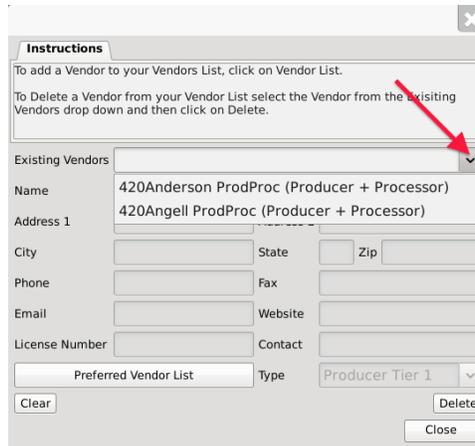
- A list of all Licensees that match the search criteria will appear in a pop up.
- Click the check box(s) of the Licensee(s) to add to your Preferred Vendor List.
- Click “OK” when complete.



- Your Preferred Vendor List is now updated with the selections.

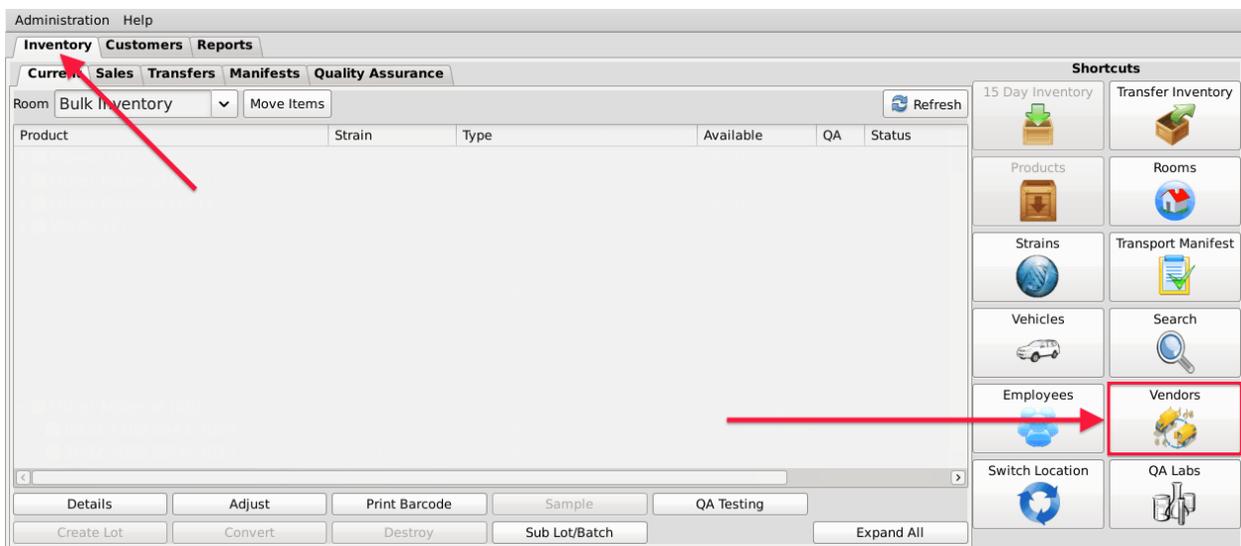


- Click “OK” when complete.
- The Vendors may now be selected from the “Existing Vendors” drop down.



## Manually Add a Vendor

On systems without a preferred vendor list, vendors will need to be added manually. First navigate to the vendors screen by clicking the Vendors shortcut indicated here:



This brings up the vendors screen:

**Vendors** [X]

**Instructions**

To add a Vendor to your Vendors List, enter their information to the right.

To Delete a Vendor from your Vendor List select the Vendor from the Existing Vendors drop down and then click on Delete.

Existing Vendors [ ]

Name [ ]

Address 1 [ ] Address 2 [ ]

City [ ] State [ ] Zip [ ]

Phone [ ] Fax [ ]

Email [ ] Website [ ]

License Number [ ] Contact [ ]

Type [Combination] [v]

[Clear] [Save] [Delete] [Close]

Input the Vendor’s business information into the provided fields and select the vendor Type before clicking “Save” to add the vendor into the system.

**Vendors** [X]

**Instructions**

To add a Vendor to your Vendors List, enter their information to the right.

To Delete a Vendor from your Vendor List select the Vendor from the Existing Vendors drop down and then click on Delete.

Existing Vendors [ ]

Name BioTrackTHC Vendor

Address 1 123 4th ST Address 2 [ ]

City City State ST Zip 12345

Phone 5555555555 Fax [ ]

Email Email@email.com Website [ ]

License Number 123456 Contact [ ]

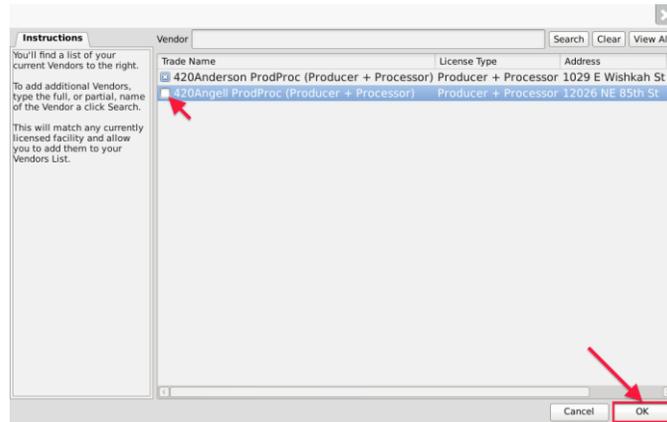
Type [Combination] [v]

[Clear] [Save] [Delete] [Close]

### Removing a Preferred Vendor

If you find that you no longer do business with a vendor that is on your Preferred Vendor List, you may remove the vendor from your Preferred Vendor List.

- From the Preferred Vendor List, uncheck the check box to the left of the vendor to be removed.



- Click "OK" when complete.

### Removing a Manually added Vendor

If you find that you no longer do business with a vendor that is on your manual Vendor List, you may remove the vendor from your list by selecting the vendor from the existing list and clicking the "Delete" button.



## Chapter 5: Strains

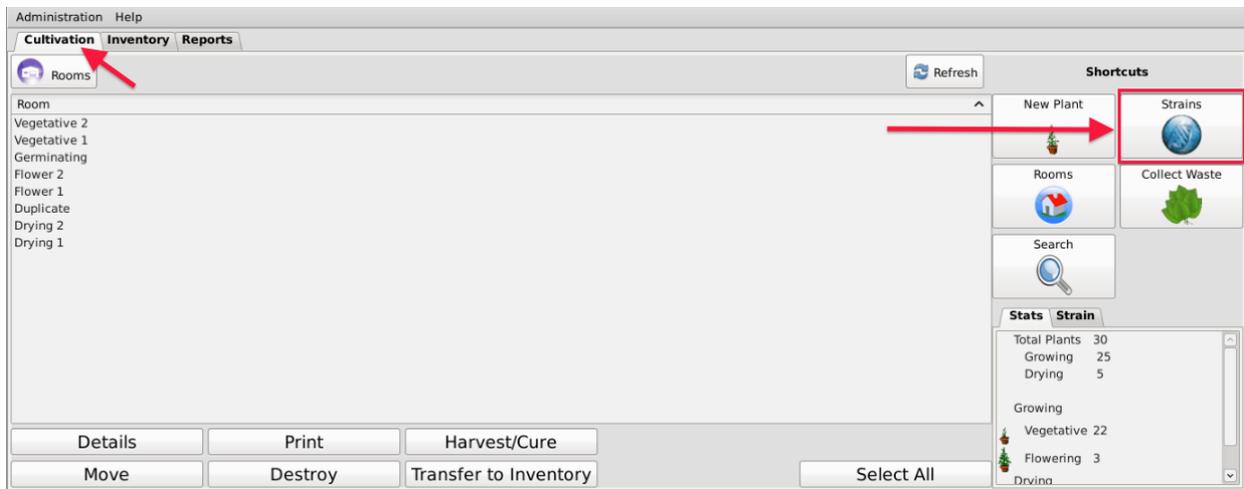
In this chapter, you will learn how to:

- ✓ Add, modify, and remove strains

### Accessing the Strains Screen

To add new strains, view or change the names of existing strains, or delete strains you no longer use, you will need to access the Strains screen.

- Navigate to either the “Cultivation” tab or the “Inventory” tab found in the top-left corner of the screen, and then click on the “Strains” button located on the right-hand side of the home screen.

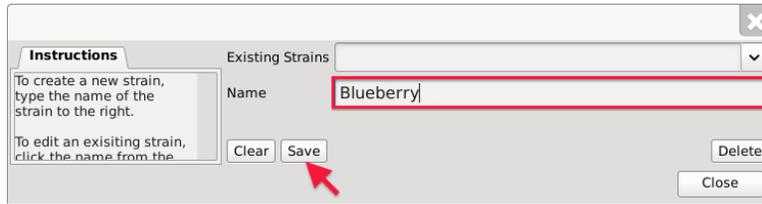


This will bring up the Strains screen.

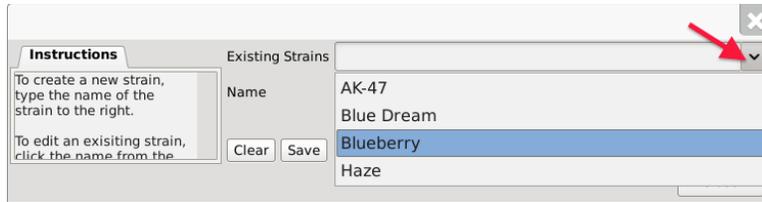
The screenshot shows the "Strains" screen form. It has a close button (X) in the top right corner. There is an "Instructions" section with two paragraphs: "To create a new strain, type the name of the strain to the right." and "To edit an existing strain, click the name from the...". To the right of the instructions is a dropdown menu labeled "Existing Strains". Below that is a text input field labeled "Name". At the bottom, there are buttons for "Clear", "Save", "Delete", and "Close".

### Add a New Strain

- From the Strains screen, click on the “Clear” button to clear all fields.
- Within the Name text box, type the name of the new Strain (e.g., Blueberry, AK-47, Sour Diesel, etc...).
- Click on the “Save” button when complete.

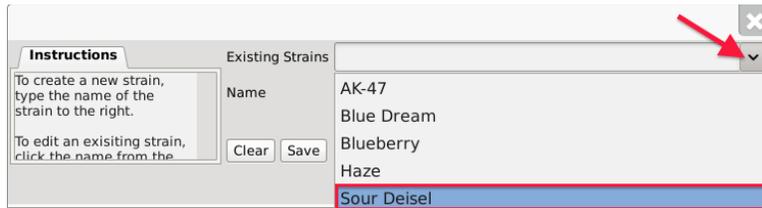


- The new strain will now appear within the Existing Strains drop down list.



### Modifying an Existing Strain

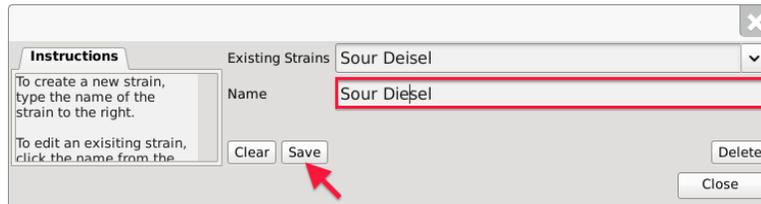
- From the Strains screen, select the strain to be modified from the Existing Strains drop down (in the example, Sour Diesel is misspelled as “Sour Diesel”).



- Once selected, the strain's name will automatically appear within the Name text box.



- Within the Name text box, rename the strain as desired (in the example, “Sour Diesel” is to be spelled correctly to “Sour Diesel”).



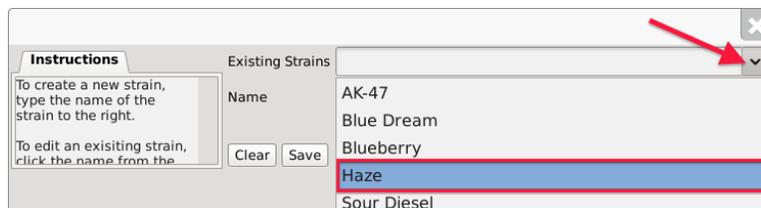
- Click on the “Save” button when complete.

### Deleting an Existing Strain

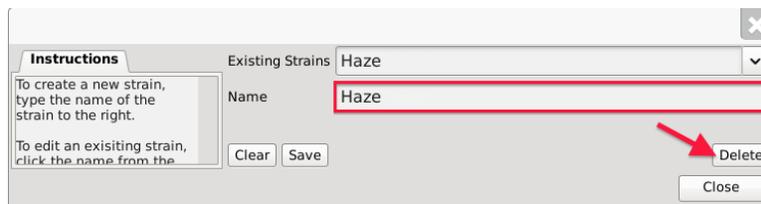
If you find that an existing strain is no longer needed (e.g., you no longer grow that strain), you may delete the strain.

**NOTE: Removing a strain does not delete any of the already submitted Traceability System data associated with that strain. It simply removes the strain from use moving forward.**

- From the Strains screen, select the strain to be deleted from the Existing Strain drop down.



- Once selected, the strain’s name will automatically appear within the Name text box.



- Click on the “Delete” button.

## Chapter 6: Traceability Logic – Rooms, Inventory, and Plants

In this chapter, you will learn:

- ✓ The inventory types your licensee-type may track within the Traceability System
- ✓ Distinguish Plant Rooms from Inventory Rooms

### About Rooms, Inventory, and Plants

Within the Traceability System, rooms represent a way to logically segregate inventory. This allows for a representation not only of the overall on-hand amount of a specific item at the Licensee location, but also the amount within a specific area of the facility.

With one exception, all of the following inventory items are to be assigned to and found within an inventory room (found under the Inventory tab) for Producers:

- Flower (cured)
- Flower Lot
- Other Plant Material
- Other Plant Material Lot
- Seeds
- Plant Tissue
- Clones (marijuana plants measuring less than eight [8] inches)

The one exception for Producers are “Plants”, which are defined as marijuana plants measuring eight (8) inches or greater in height or width. (8 inches is common regulation size but may vary by jurisdiction). Though all plants are inventory items, the Traceability System distinguishes a

- **Mature Plant:** a plant assigned to and found within an inventory room because it was recently purchased but not yet planted or because it is to be sold to another Producer.
- **Plant:** a plant assigned to and found within a plant room (found under the Cultivation tab) because it is within the vegetation/flowering/harvesting production area.

In other words, *plant rooms* (found under the Cultivation tab) *contain plants that are in production*, while *inventory rooms* (found under the Inventory tab) *contain all other inventory types, including mature plants that are not in production* because they were either recently purchased and have yet to be planted or they are ready for sale to another Producer.

## Chapter 7: Plant Rooms

In this chapter, you will learn how to:

- ✓ Add, modify and remove plant rooms
- ✓ Navigate the plant rooms and screens

### About Plant Rooms

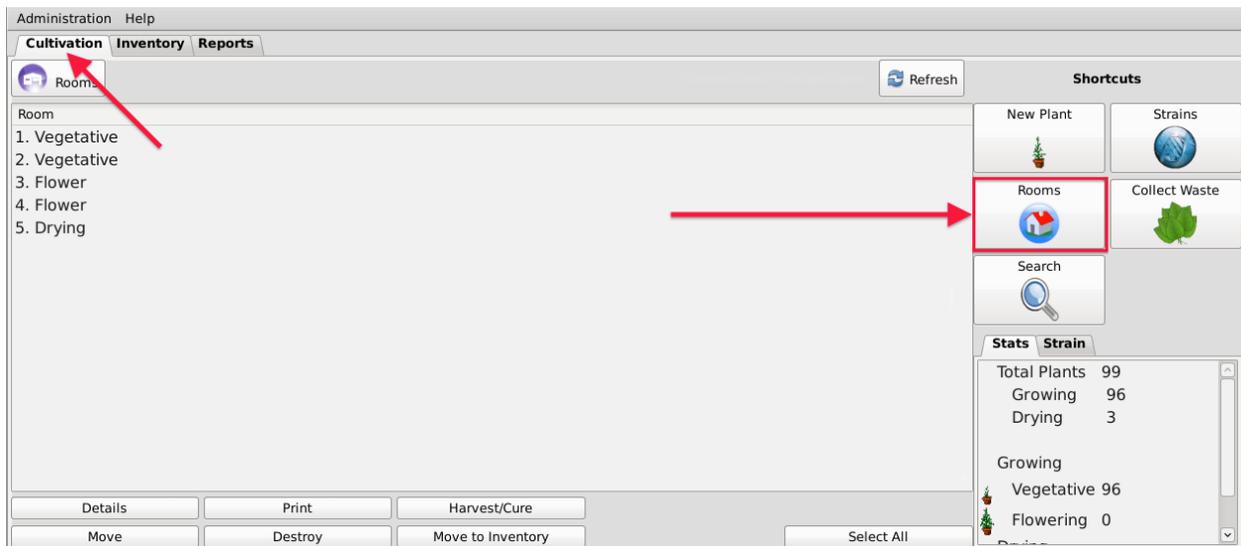
Plant rooms represent a way to logically segregate plants that are in production (vegetation/flowering/harvesting). These can include actual rooms inside of an indoor facility or fields in an outdoor facility. You begin with one room named, “Default”.

**NOTE: Please be sure to read Chapter 6: Traceability Logic – Rooms, Inventory, and Plants prior to reading this chapter.**

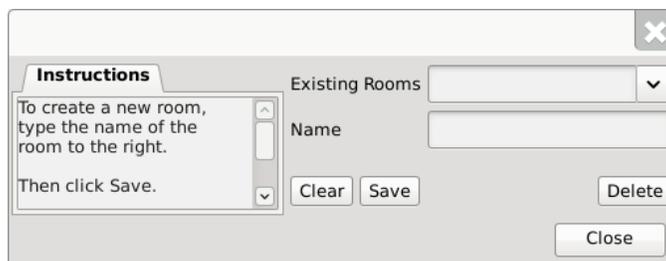
### Accessing the Rooms Screen

To add new plant rooms, change the names of existing plant rooms, or delete plant rooms you no longer use, you will need to access the Rooms screen.

- Navigate to the “Cultivation” tab found in the top-left corner of the screen, and then click on the “Rooms” button located on the right-hand side of the home screen.

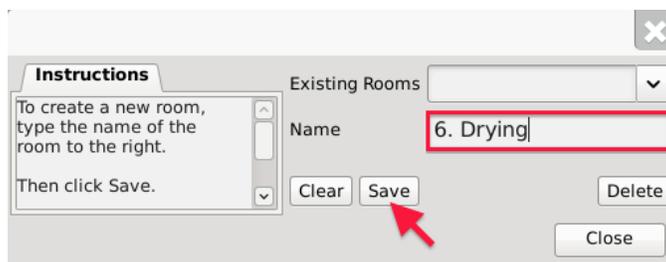


- This will bring up the Rooms screen.

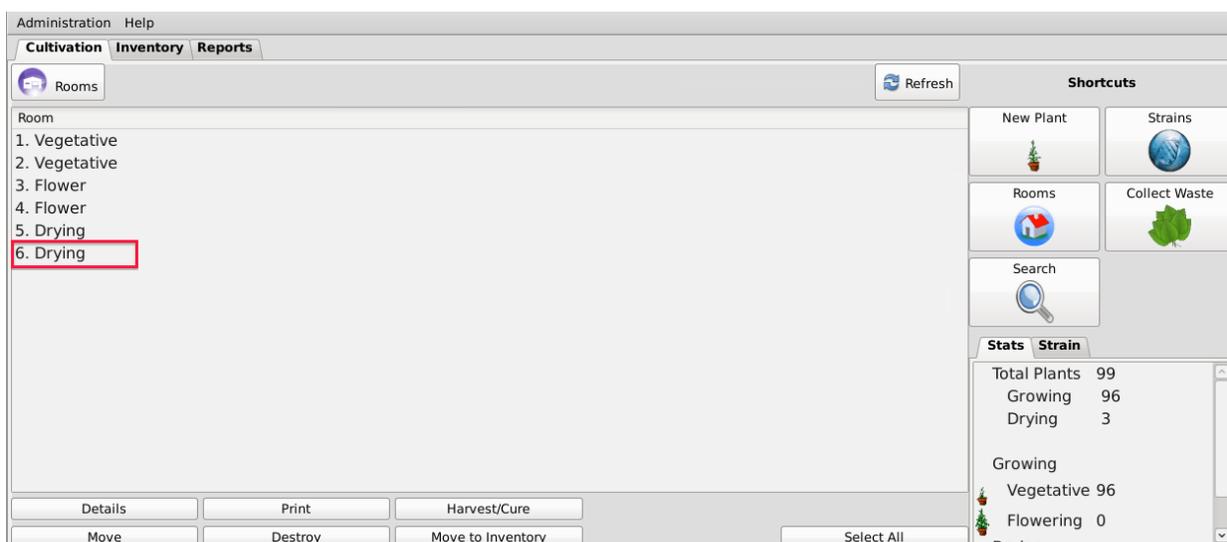


### Creating a New Plant Room

- From the Rooms screen, click on the “Clear” button to clear all fields.
- Within the Name text box, type the name of the new plant room (e.g., Vegetation, Flower, etc...).
- Click on the “Save” button when complete.

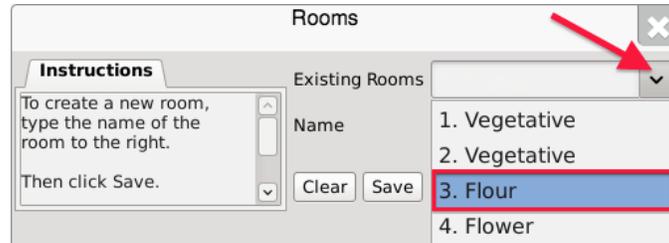


- The new plant room will now appear within the Plant Rooms area.

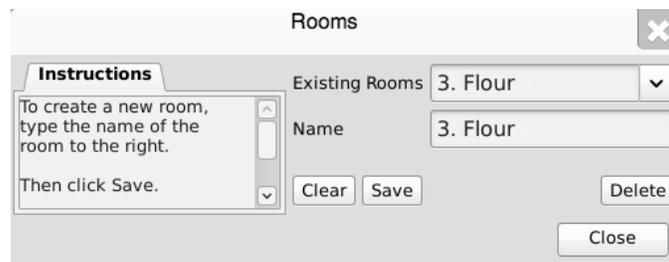


## Modifying an Existing Plant Room

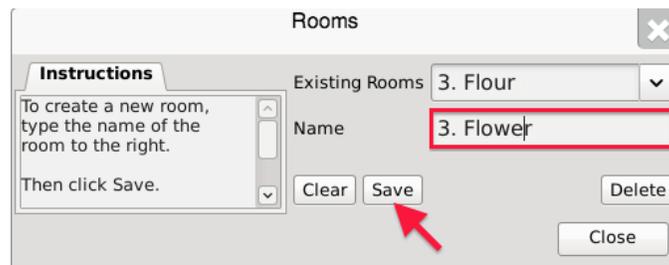
- From the Rooms screen, select the plant room to be modified from the Existing Rooms drop down.



- Once selected, the room's name will automatically appear within the Name text box.



- Within the Name text box, rename the room as desired (in the example, "3. Flour" is being changed to "3. Flower").
- Click on the "Save" button when complete.

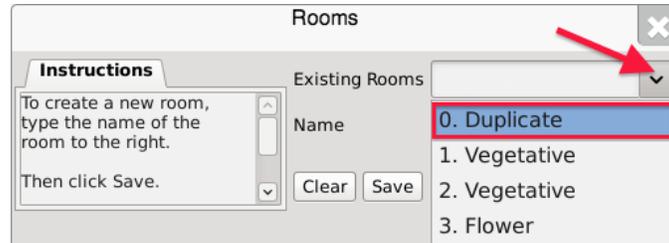


## Deleting a Plant Room

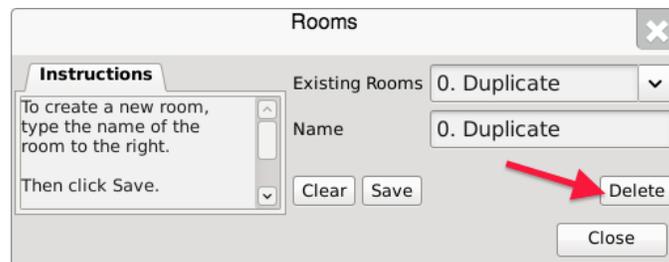
If you find that an existing plant room is no longer needed, you may delete the plant room.

**NOTE: Removing a plant room does not delete any of that room's already submitted Traceability System data. It simply removes the room from use moving forward.**

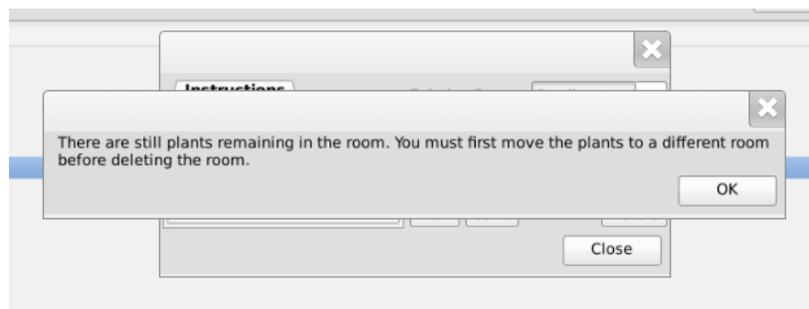
- From the Rooms screen, select the room to be deleted from the Existing Rooms dropdown.



- Once selected, the room's name will automatically appear within the Name text box.



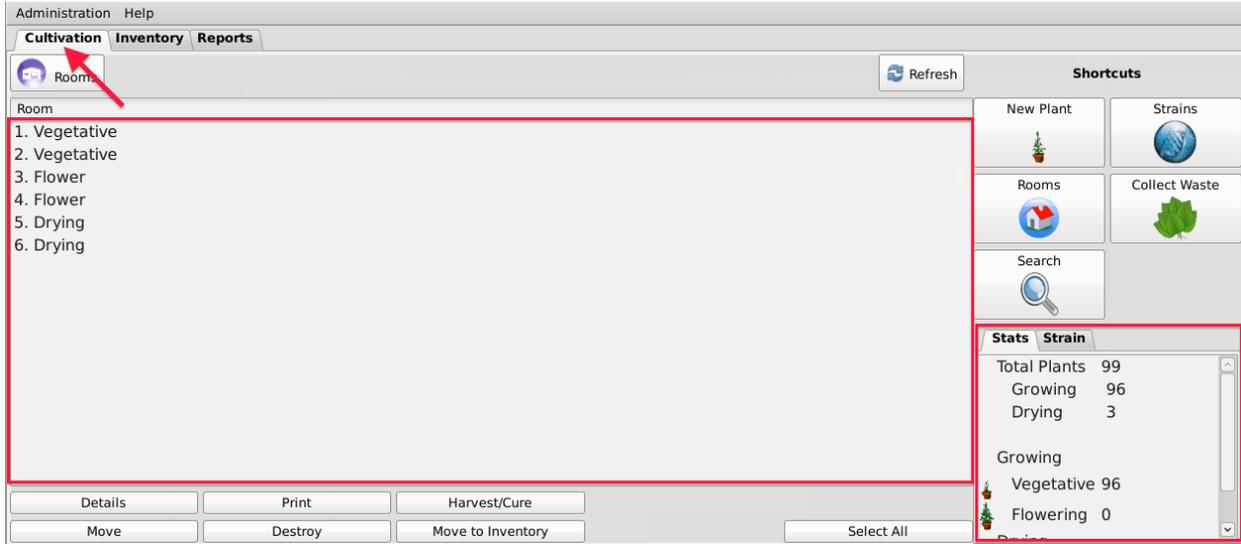
- Click on the "Delete" button.
  - If there are still plants in the room, the following pop-up will appear:



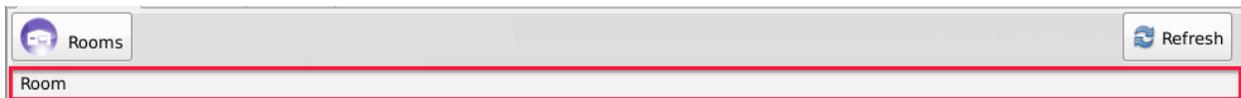
- If there are no longer any plants still in the room, the Traceability System will allow deletion of the room.

## Navigating Plant Rooms

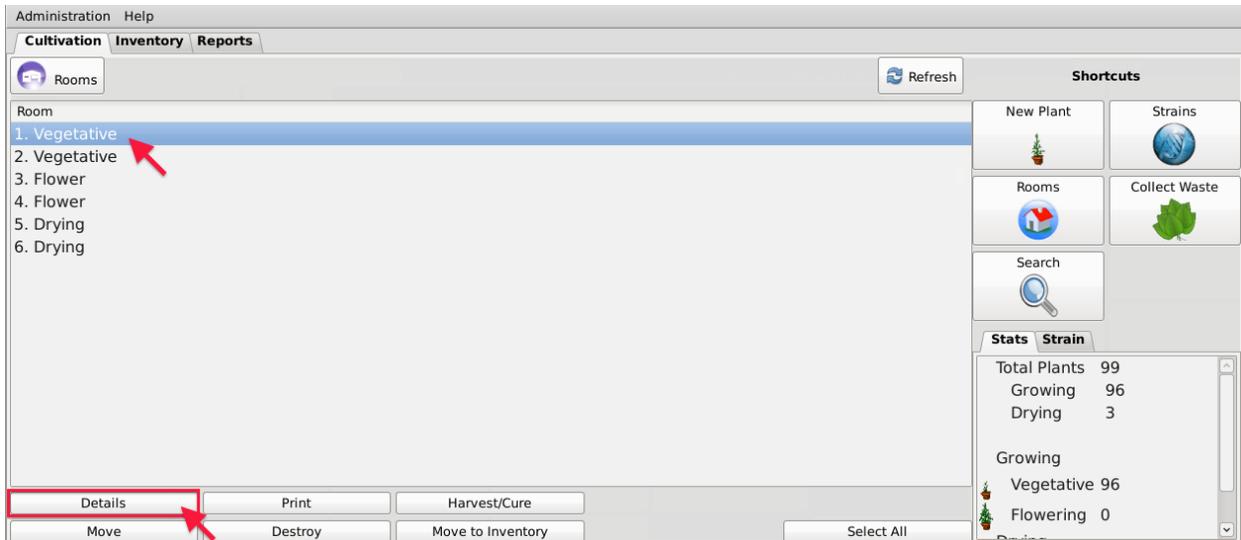
When in the “Cultivation” tab, all of the existing rooms are listed within the main window. Additionally, total plant count by phase and by strain for the licensed location may be viewed within the “Stats” and “Strains” tabs respectively.



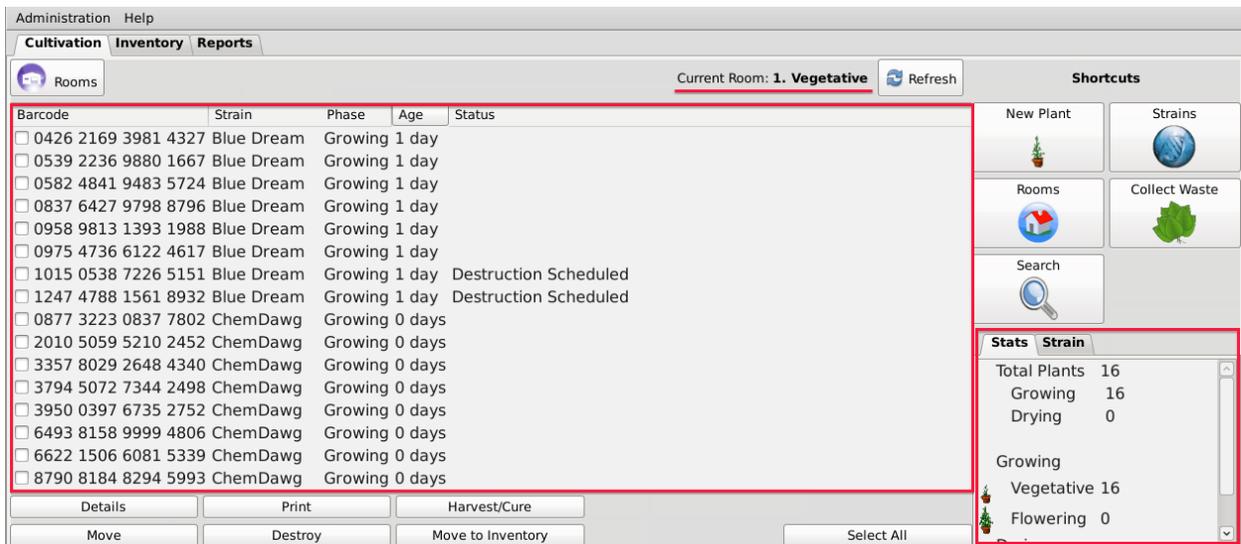
Rooms may be sorted, by name in either alphabetical order or reverse-alphabetical order, by clicking on the Room header bar.



Double-click on a room to view its contents. Alternatively, you may single-click the room to highlight it, and then click the “Details” button found in the bottom-left corner of the screen

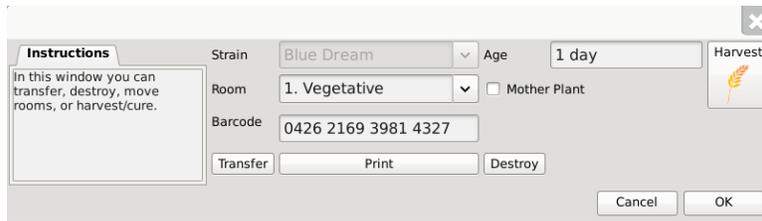


The primary window now lists the contents of the selected room. Note that for ease of reference, the room's name is specified near the top-right of the primary window, just to the left of the "Refresh" button.



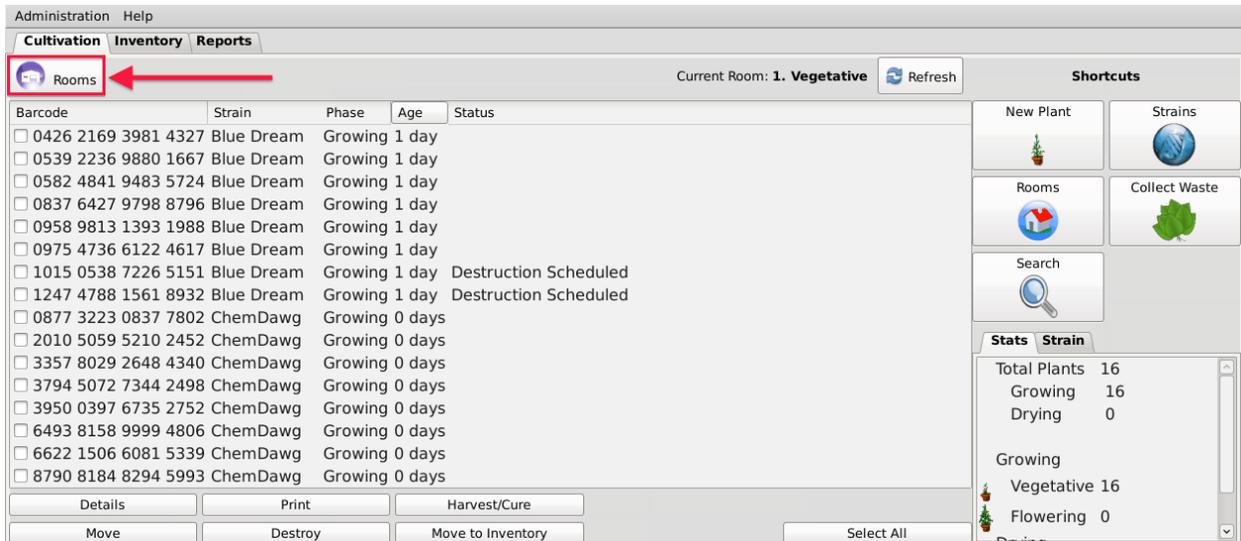
In this view, plant information includes Traceability Identifier, Strain, Phase, Age, and Status as is recorded in the Traceability System. Additionally, plant count by phase and by strain for the selected room may be viewed within the "Stats" and "Strains" tabs respectively.

Double-click on a plant to view the Plant Information screen for that plant. Alternatively, you may single-click the plant to highlight it, and then click the "Details" button found in the bottom-left corner of the screen.



Additional detail regarding the use of the Plant Information screen may be found within Chapter 10: Plant Basics.

The “Rooms” button in the top-left corner of the screen may be used at any time to return to the main screen where all of the rooms are listed.



If at any time you perform an action in the Traceability System and it appears that the Traceability System did not update, try clicking on the “Refresh” button found in the upper-right corner of the screen.

Administration Help

**Cultivation** Inventory Reports

Rooms Current Room: 1. Vegetative  Refresh

Barcode	Strain	Phase	Age	Status
<input type="checkbox"/> 0426 2169 3981 4327	Blue Dream	Growing	1 day	
<input type="checkbox"/> 0539 2236 9880 1667	Blue Dream	Growing	1 day	
<input type="checkbox"/> 0582 4841 9483 5724	Blue Dream	Growing	1 day	
<input type="checkbox"/> 0837 6427 9798 8796	Blue Dream	Growing	1 day	
<input type="checkbox"/> 0958 9813 1393 1988	Blue Dream	Growing	1 day	
<input type="checkbox"/> 0975 4736 6122 4617	Blue Dream	Growing	1 day	
<input type="checkbox"/> 1015 0538 7226 5151	Blue Dream	Growing	1 day	Destruction Scheduled
<input type="checkbox"/> 1247 4788 1561 8932	Blue Dream	Growing	1 day	Destruction Scheduled
<input type="checkbox"/> 0877 3223 0837 7802	ChemDawg	Growing	0 days	
<input type="checkbox"/> 2010 5059 5210 2452	ChemDawg	Growing	0 days	
<input type="checkbox"/> 3357 8029 2648 4340	ChemDawg	Growing	0 days	
<input type="checkbox"/> 3794 5072 7344 2498	ChemDawg	Growing	0 days	
<input type="checkbox"/> 3950 0397 6735 2752	ChemDawg	Growing	0 days	
<input type="checkbox"/> 6493 8158 9999 4806	ChemDawg	Growing	0 days	
<input type="checkbox"/> 6622 1506 6081 5339	ChemDawg	Growing	0 days	
<input type="checkbox"/> 8790 8184 8294 5993	ChemDawg	Growing	0 days	

**Shortcuts**

New Plant 

Strains 

Rooms 

Collect Waste 

Search 

**Stats** **Strain**

Total Plants 16

Growing 16

Drying 0

Growing

Vegetative 16

Flowering 0

## Chapter 8: Inventory Rooms

In this chapter, you will learn how to:

- ✓ Add, modify and remove inventory rooms
- ✓ Navigate the inventory rooms and screens

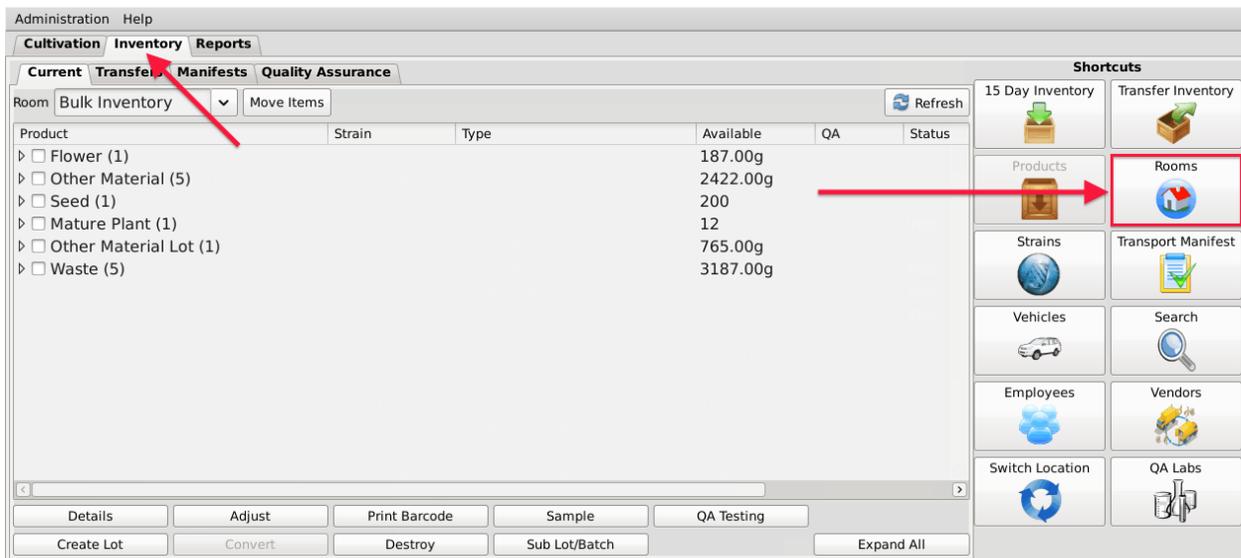
Inventory rooms represent a way to logically segregate inventory items. You begin with one room named “Bulk Inventory” and one room named “Quarantine”.

**NOTE: Please be sure to read Chapter 6: Traceability Logic – Rooms, Inventory, and Plants prior to reading this chapter.**

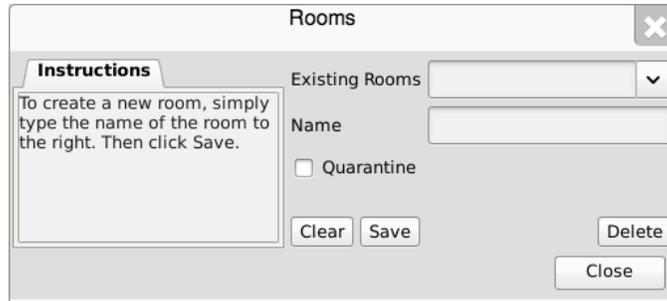
### Accessing the Rooms Screen

To add new inventory rooms, change the names of existing inventory rooms, or delete inventory rooms you no longer use, you will need to access the Rooms screen.

- Navigate to the “Inventory” tab found in the top-left corner of the screen, and then click on the “Rooms” button located on the right-hand side of the home screen.



- This will bring up the Rooms screen.

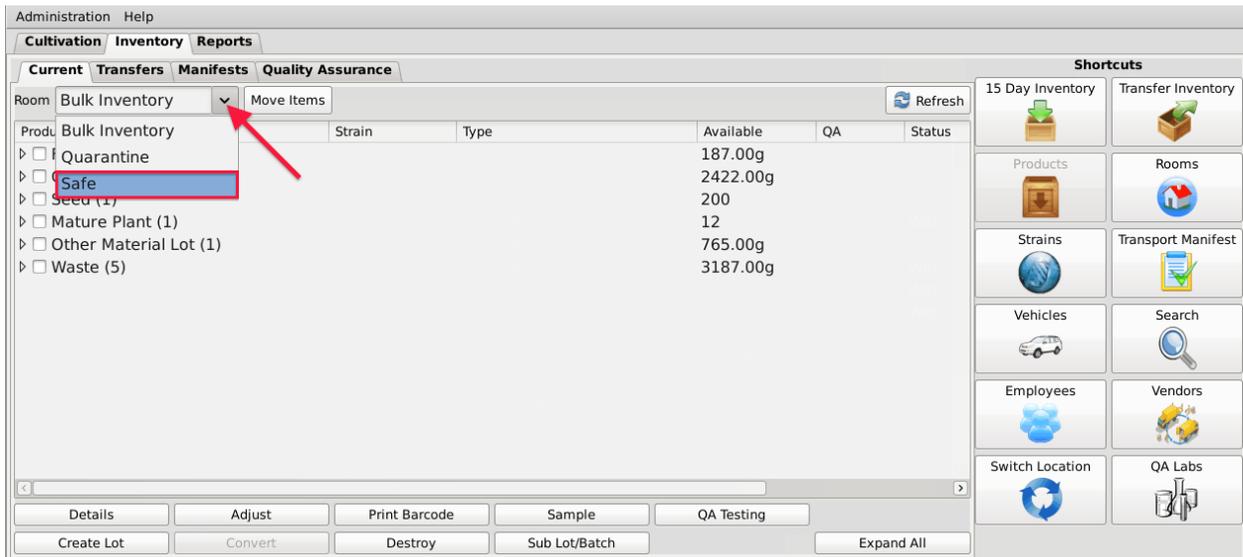


### Creating a New Inventory Room

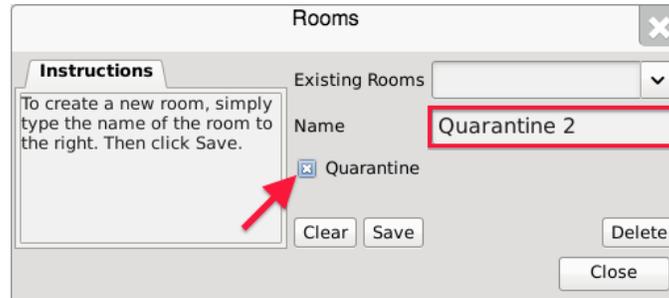
- From the Rooms screen, click on the “Clear” button to clear all fields.
- Within the Name text box, type the name of the new Room (e.g., Safe, etc.).
- Click on the “Save” button when complete.



- The new room will now appear within the Rooms drop down for selection.

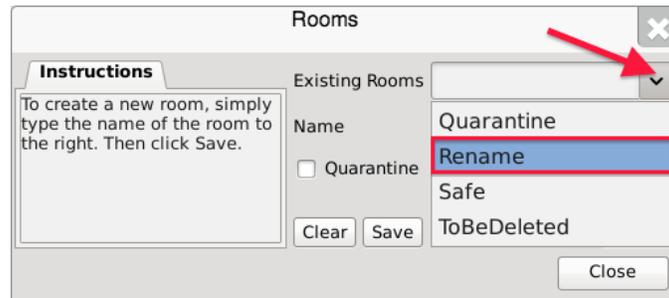


- If the room is to be an additional Quarantine room, be sure to click on the “Quarantine” check box prior to saving.

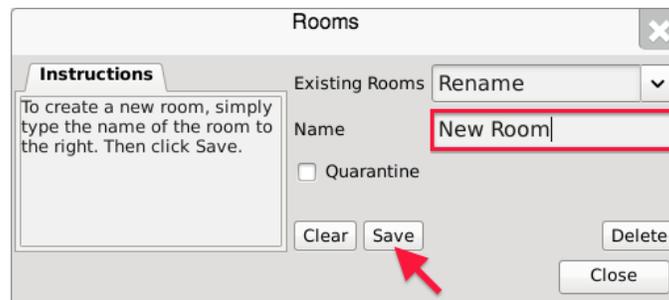


### Modifying an Existing Inventory Room

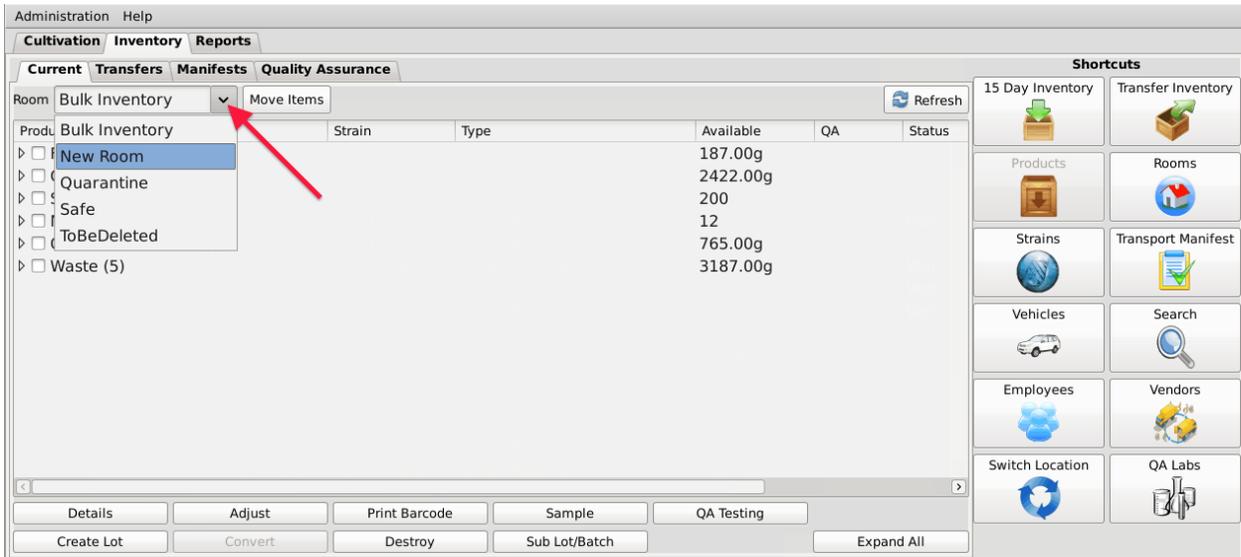
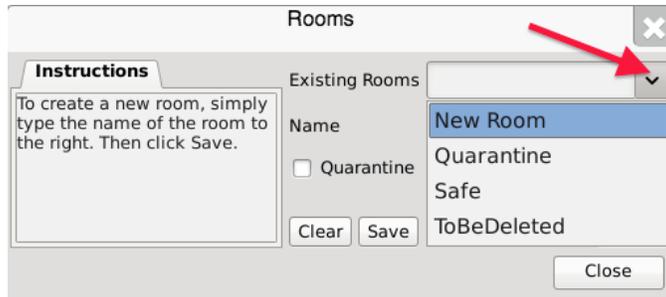
- From the Rooms screen, select the room to be modified from the Existing Rooms drop down.



- Once selected, the room’s name will automatically appear within the Name text box.
- Within the Name text box, rename the room as desired.



- Click on the “Save” button when complete
- The renamed room will now appear within the Rooms drop down for selection.

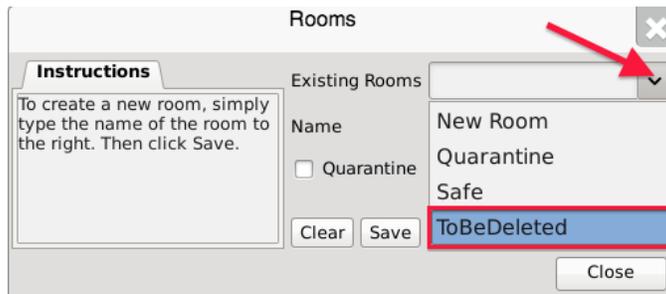


### Deleting an Inventory Room

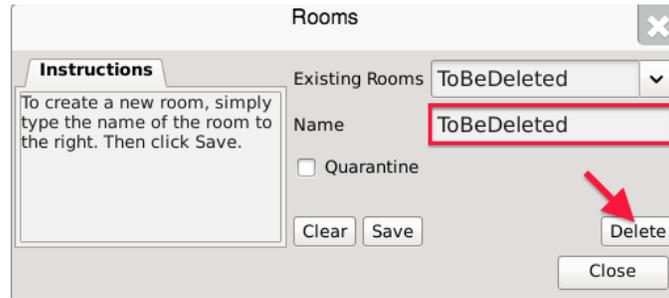
If you find that an existing inventory room is no longer needed, you may delete the room.

**NOTE: Removing a room does not delete any of that room's already submitted Traceability System data. It simply removes the room from use moving forward.**

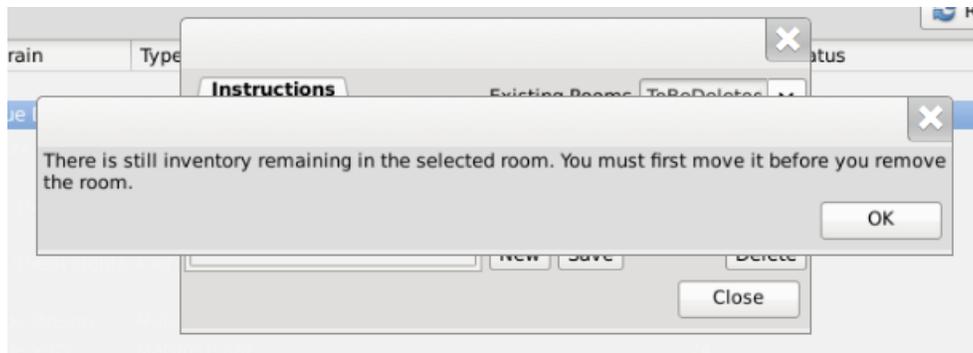
- From the Rooms screen, select the room to be removed from the Existing Rooms drop down.



- Once selected, the room’s name will automatically appear within the Name text box.



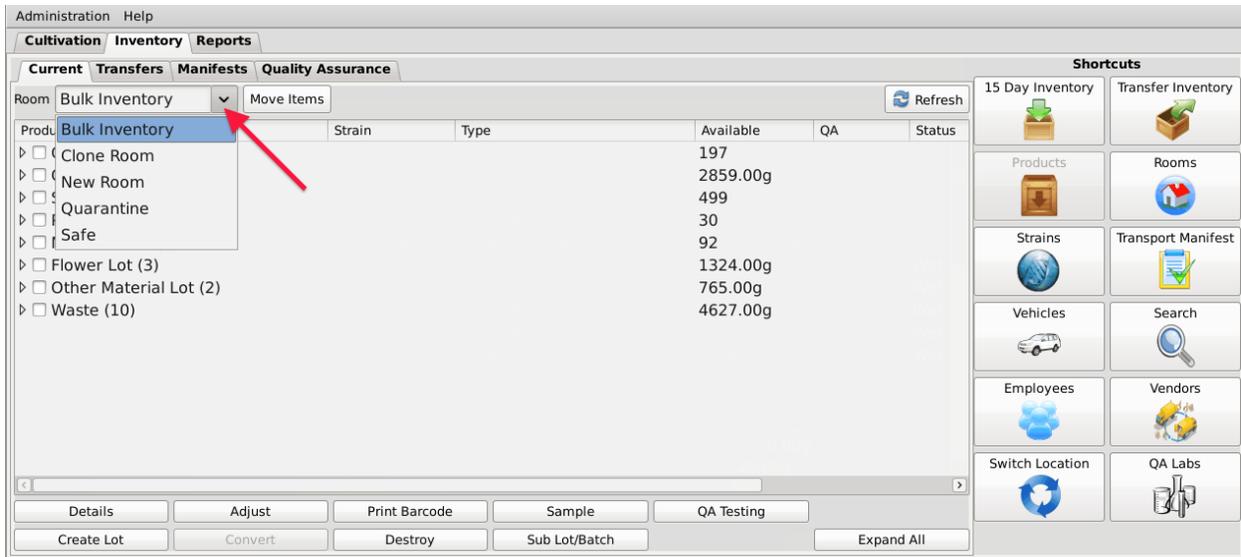
- Click on the “Delete” button.
  - If there is still inventory in the room, the following will appear:



- If there is no longer any inventory still in the room, the Traceability System will allow removal of the room

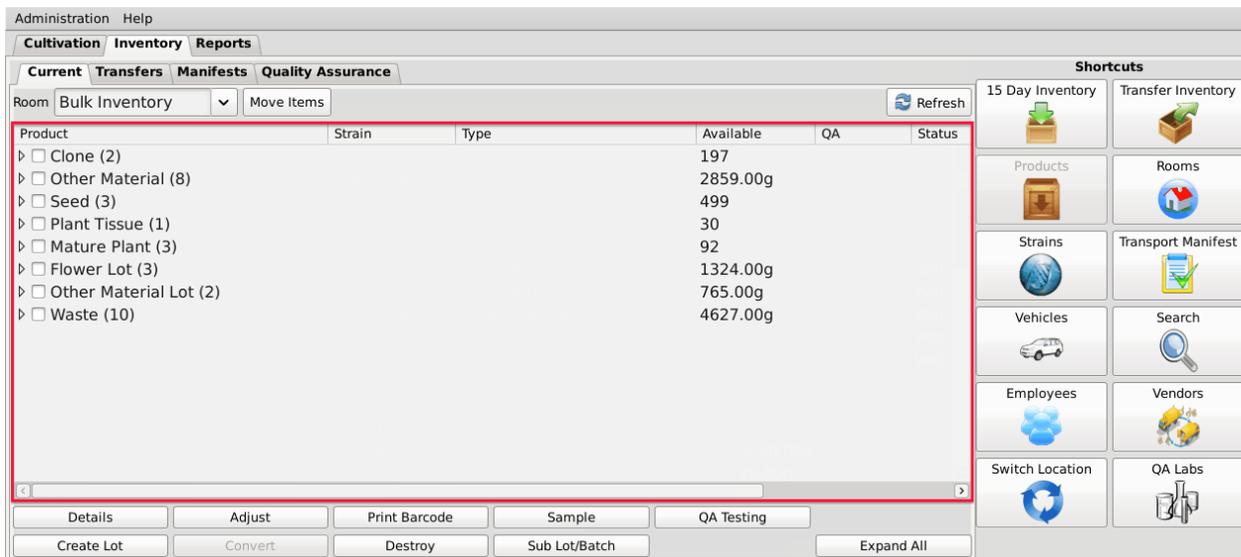
### Navigating Inventory Rooms

When in the “Inventory” tab, all of the existing rooms are listed within the Room dropdown in alphabetical order.



Click on a room to view its contents.

The primary window lists the contents of the selected room. Inventory items are grouped by product type. The number in parentheses that appears to the right of the product type indicates how many Traceability Identifiers are grouped within it, if more than one.



To view the individual inventory items contained within a group you can perform either of the following actions:

- Double-click on the group;
- Single-click on the Expand/Collapse arrow to the left of the product type;

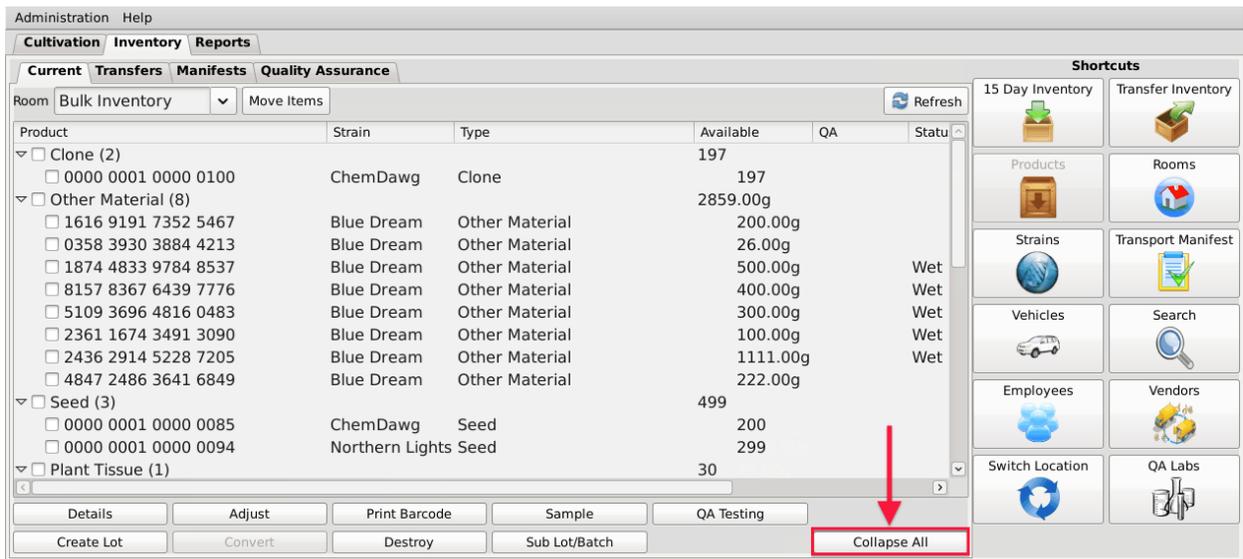
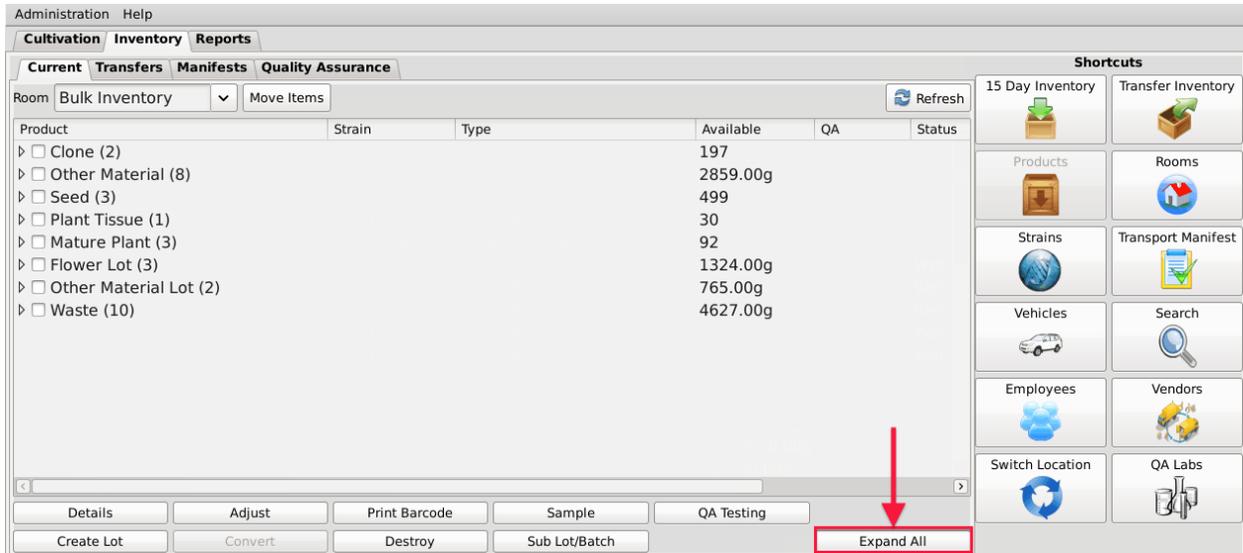
- Single-click on a group to highlight it, and then click the “Details” button found in the bottom-left corner of the screen;

The screenshot displays the BIOTRACKTHC software interface. At the top, there are navigation tabs for 'Administration' and 'Help', and sub-tabs for 'Cultivation', 'Inventory', and 'Reports'. Below these, there are further sub-tabs for 'Current', 'Transfers', 'Manifests', and 'Quality Assurance'. The main area shows a table of inventory items with columns for Product, Strain, Type, Available, QA, and Status. A red arrow points to the 'Mature Plant (3)' group in the table. Another red arrow points to the 'Details' button in the bottom-left corner of the interface.

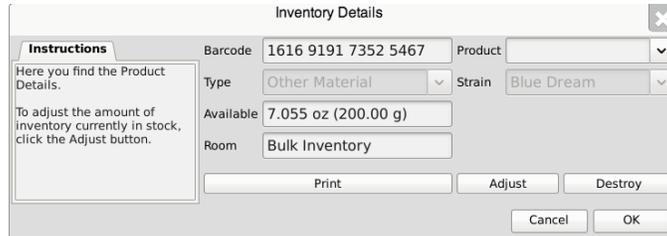
Product	Strain	Type	Available	QA	Status
▶ <input type="checkbox"/> Clone (2)			197		
▶ <input type="checkbox"/> Other Material (8)			2859.00g		
▶ <input type="checkbox"/> Seed (3)			499		
▶ <input type="checkbox"/> Plant Tissue (1)			30		
▶ <input checked="" type="checkbox"/> Mature Plant (3)			92		
<input type="checkbox"/> 0000 0001 0000 0024	Blueberry	Mature Plant	30.00		
<input type="checkbox"/> 0000 0001 0000 0084	ChemDawg	Mature Plant	12		
<input type="checkbox"/> 0000 0001 0000 0095	Sour Diesel	Mature Plant	50		
▶ <input type="checkbox"/> Flower Lot (3)			1324.00g		
▶ <input type="checkbox"/> Other Material Lot (2)			765.00g		
▶ <input type="checkbox"/> Waste (10)			4627.00g		

In this view, plant information includes Traceability Identifier, Strain, Inventory Type, Quantity Available, QA Status (if applicable), and Status as is recorded in the Traceability System.

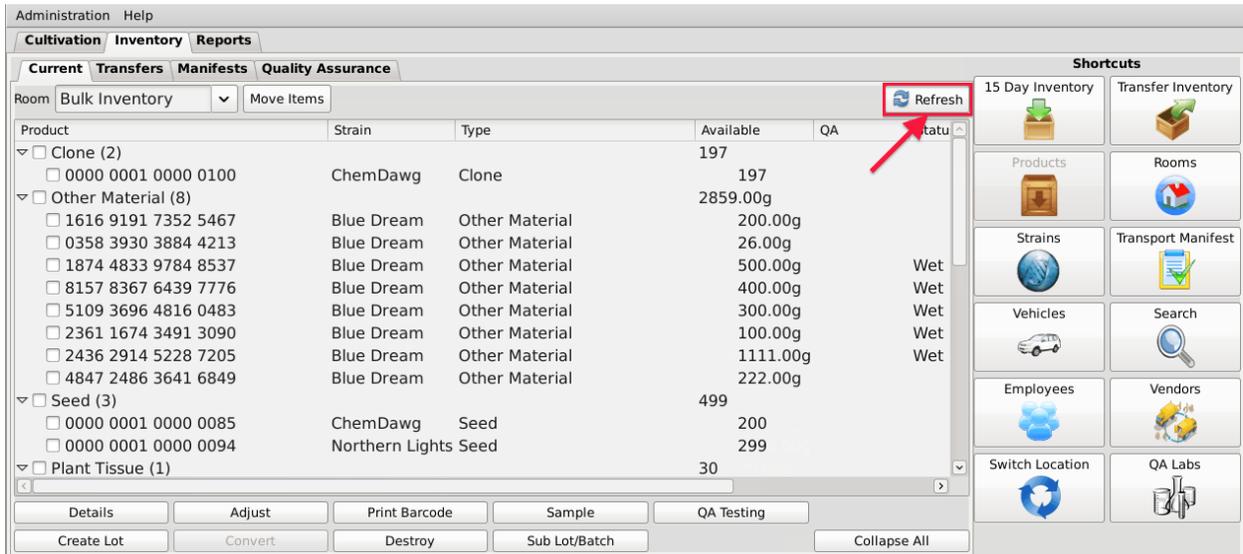
In addition to expanding/collapsing groups individually, you may expand/collapse all groups at once by clicking on the “Expand All” / “Collapse All” button located in the lower-right corner of the screen. The button alternates from “Expand All” to “Collapse All” and back every click.



Double-click on an inventory item to view the Inventory Details screen for that item. Alternatively, you may single-click the item to highlight it, and then click the “Details” button found in the bottom-left corner of the screen.



If at any time you perform an action in the Traceability System and it appears that the Traceability System did not update, try clicking on the “Refresh” button found in the upper-right corner of the screen.



## Chapter 9: Start-up Inventory (15 Day Window)

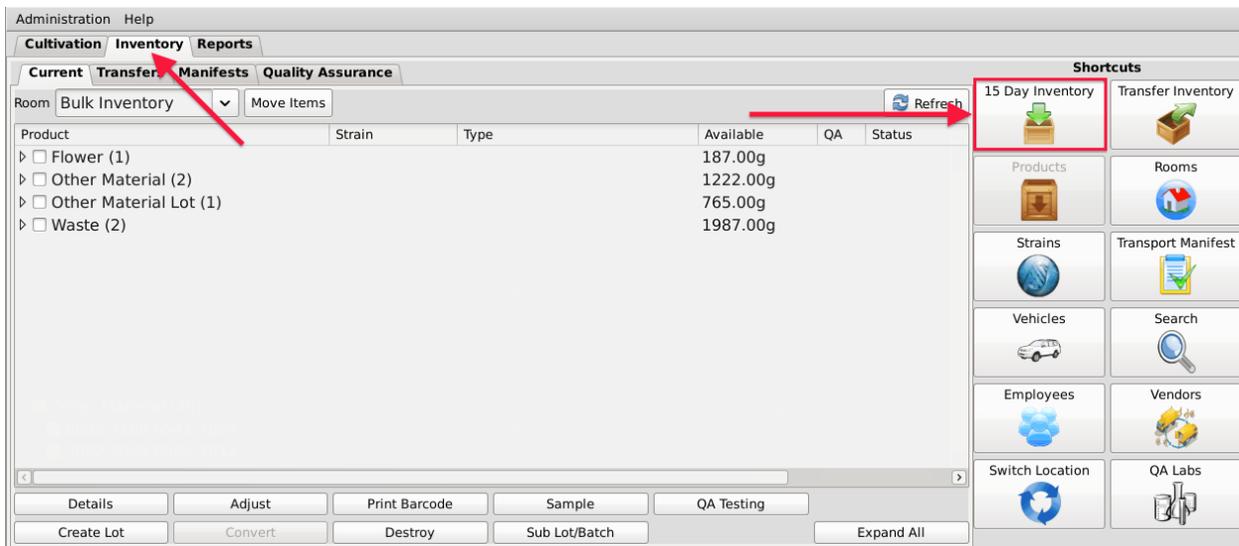
In this chapter, you will learn how to:

- ✓ Add 15-day start-up inventory into the Traceability System

### Accessing the 15 Day Inventory Screen

To add new start up inventory to the Traceability System, you will need to access the 15 Day Inventory screen. **THIS BUTTON WILL AUTOMATICALLY DEACTIVATE ONCE YOUR 15 DAY WINDOW HAS EXPIRED.**

- Navigate to the “Inventory” tab found in the top-left corner of the screen, and then click on the “15 Day Inventory” button located on the right-hand side of the screen.



The screenshot shows the BIOTRACKTHC software interface. At the top, there are tabs for 'Administration' and 'Help'. Below that, there are tabs for 'Cultivation', 'Inventory', and 'Reports'. The 'Inventory' tab is selected, and it has sub-tabs for 'Current', 'Transfer', 'Manifests', and 'Quality Assurance'. The 'Current' sub-tab is active, showing a 'Room' dropdown set to 'Bulk Inventory' and a 'Move Items' button. A table displays inventory items with columns for Product, Strain, Type, Available, QA, and Status. The table contains four rows of data:

Product	Strain	Type	Available	QA	Status
Flower (1)			187.00g		
Other Material (2)			1222.00g		
Other Material Lot (1)			765.00g		
Waste (2)			1987.00g		

At the bottom of the screen, there are several buttons: Details, Adjust, Print Barcode, Sample, QA Testing, Create Lot, Convert, Destroy, Sub Lot/Batch, and Expand All. On the right side, there is a 'Shortcuts' panel with buttons for 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, and QA Labs. The '15 Day Inventory' button is highlighted with a red box and an arrow.

- This will bring up the 15 Day Inventory screen.

### Recording 15 Day Start up Inventory

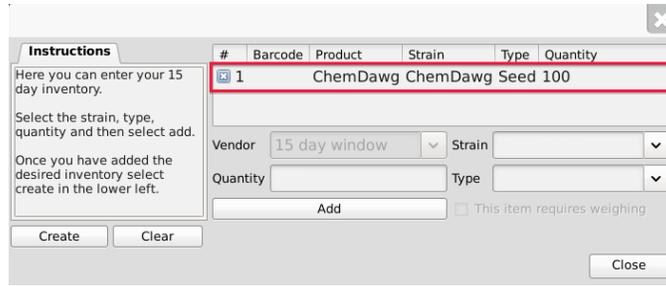
- From the 15 Day Inventory screen, enter the following information:
  - Strain drop down: select the strain of the inventory being added. If the applicable strain does not appear within the drop down, you will first need to add the strain as detailed in the section titled Add a New Strain.
  - Type drop down: select the type of start up inventory being added. The only available options are seeds, clones, mature plants, and plant tissue.
  - Quantity: key in the quantity of start up inventory being added.

**NOTE: The 15 day window is only available during the designated 15 day period, and will be replaced by the new inventory shortcut.**

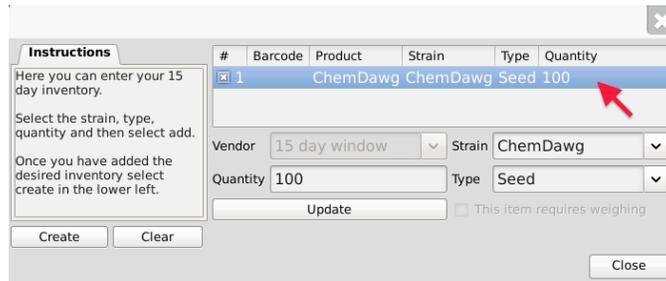
- When the fields have been completed, click the “Add” button.

- The inventory as entered now appears within the list of items to be created. You may add multiple items to the list if you desire.

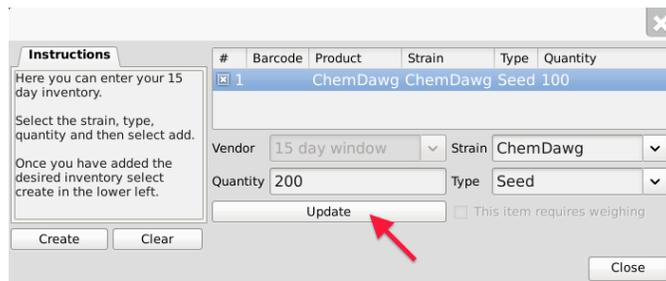
**NOTE: Clicking the “Add” button does NOT commit the item to the Traceability System. If you close out the window before clicking the “Create” button as detailed below, you will lose any information entered.**



- If upon review you realize that the information was entered incorrectly,
  - Click on the item and the fields will auto-populate with the item's current information. This may also be done if multiple items are within the list.



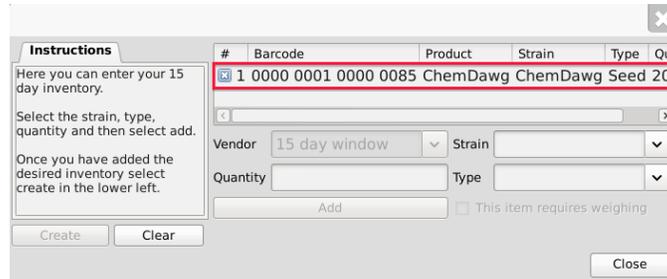
- Make whatever adjustments necessary for the information to be accurate (in the example, quantity is changed from 100 to 200). Click "Update" when complete.



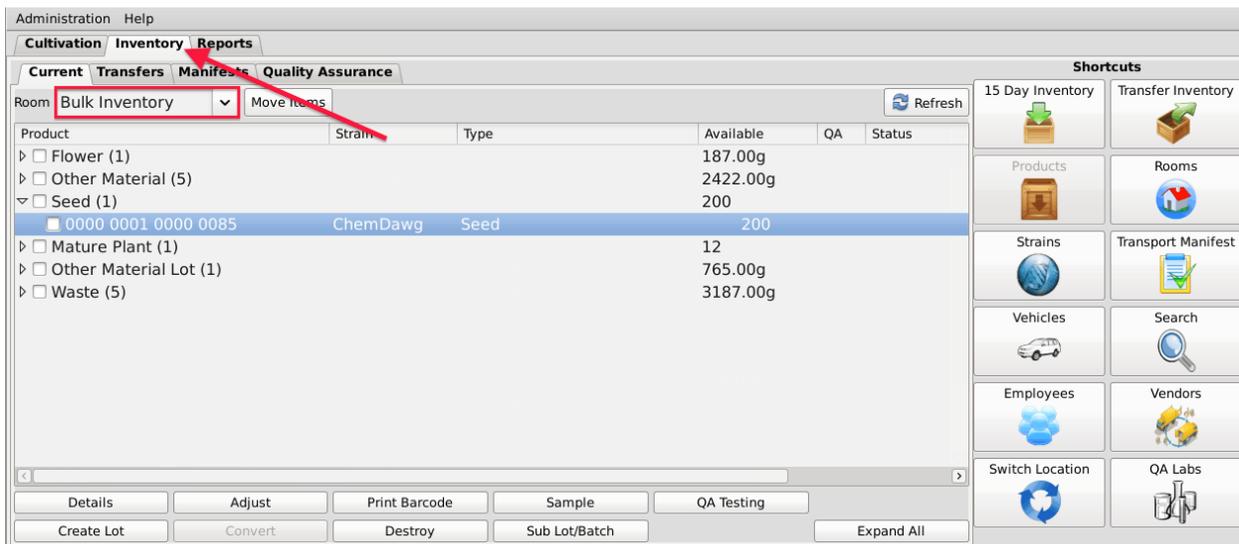
- Once all items are completed and correct, click "Create".



- The window now updates to show the Traceability Identifier assigned to the newly created inventory.



- You may now find the newly created inventory under the “Inventory” tab and within the “Bulk Inventory” room under its respective heading (i.e., seed, clone, mature plant, or plant tissue).



### Adding plants and seeds to inventory after the 15-day period

When pulling small clones and seeds from a mother plant you may add them using the new plant shortcut. This shortcut will appear in lieu of the 15 day inventory shortcut after the allotted range has expired. However the process is almost identical. The primary difference being that instead of pulling from a vendor of 15 day window, it will provide a source search queue. Once you press the source button, you may choose from any of your eligible sources (i.e. Mother plants). The only variation in applicable type is that you will no longer be able to choose *mature plant* and must choose either *plant tissue*, *seed* or *clone*. The nominal change can be seen below.

## Adding Plants to Cultivation

It is important to note that importing plants into Bulk Inventory is only the first step in accounting for plants in the Traceability System. As detailed in Chapter 6: Traceability Logic – Rooms, Inventory, and Plants, “*plant rooms* (found under the Cultivation tab) *contain plants that are in production*, while *inventory rooms* (found under the Inventory tab) *contain all other inventory types, including mature plants that are not in production* because they were either recently purchased and have yet to be planted or they are ready for sale to another Producer.”

**You must continue on to the next chapter (Chapter 10: Plant Basics) to add plants into the Cultivation area.**

## Chapter 10: Plant Basics

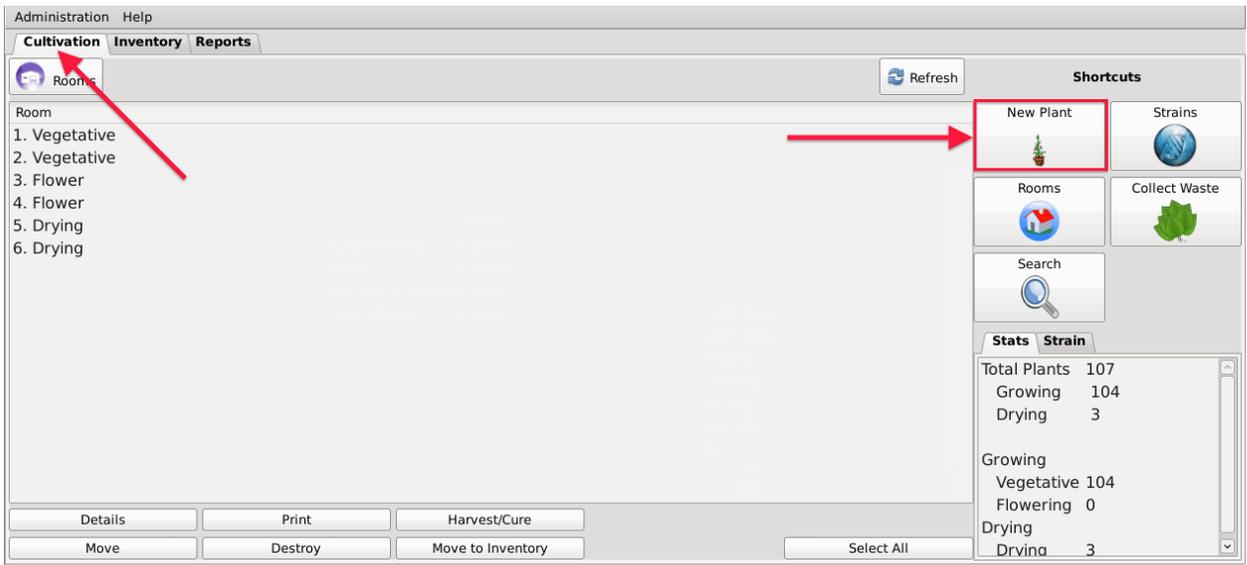
In this chapter, you will learn how to:

- ✓ Create a new plant via seed, clone, or plant tissue
- ✓ Undo new plant creation
- ✓ Look up a plant
- ✓ Move a plant between plant rooms

### Create a New Plant

To create new plants via seed, clone, or plant tissue, you will need to access the New Plant screen.

- Navigate to the “Cultivation” tab found in the top-left corner of the screen, and then click on the “New Plant” button located on the right-hand side of the home screen.



- This will bring up the New Plant screen.

The 'New Plant' dialog box is shown. It has a title bar with a close button. The 'Instructions' section contains the text: 'Please select the Source ID, quantity, and room.' The 'Quantity' field is a text input with the value '1'. The 'Room' field is a dropdown menu with '1. Vegetative' selected. The 'Source ID' field is a text input. There are two checkboxes: 'Mother Plant' and 'Print Barcode', both of which are unchecked. At the bottom, there are 'Cancel' and 'OK' buttons.

- Within the New Plant screen, enter the following information:
  - Quantity: the number “1” is entered by default, but you may create up to 1,000 plants at one time.
  - Room drop down: select the room in which the new plant(s) is(are) located.
    - If you clicked on the “New Plant” button while within a specific plant room, the system will default to that room.
    - If you clicked on the “New Plant” button while not within a specific plant room, the system will default to the first plant room in alphabetical order
  - Source ID: Click on the “Source ID” button to view a list of all available sources for new plant propagation.

The screenshot shows a dialog box titled "Make a Selection" with a close button (X) in the top right corner. The dialog contains a table with the following data:

ID #	Remaining	Strain	Type
0000 0001 0000 0093	100	Blue Dream	Clone
0000 0001 0000 0085	200	ChemDawg	Seed
0000 0001 0000 0094	300	Northern Lights	Seed
0000 0001 0000 0084	12	ChemDawg	Mature Plant
0000 0001 0000 0095	50	Sour Diesel	Mature Plant

At the bottom of the dialog box, there are two buttons: "Cancel" and "OK".

- Select the seed, clone, mature plant, or plant tissue from which the new plant(s) is(are) being propagated. The system will automatically determine the strain of the new plant(s) based on the Source ID.

**New Plant** ✕

**Instructions**

Please select the Source ID, quantity, and room.

Quantity:

Room:

Source ID:   
0000 0001 0000 0094

Mother Plant

Print Barcode 

- Click on the “OK” button once all of the required data has been entered.
- The created plant(s) may now be found within the room designated.

Administration Help

**Cultivation** | Inventory | Reports

 Rooms Current Room: **1. Vegetative** 

Barcode	Strain	Phase	Age	Status
<input type="checkbox"/> 0958 9813 1393 1988	Blue Dream	Growing	19 days	
<input type="checkbox"/> 0975 4736 6122 4617	Blue Dream	Growing	19 days	
<input type="checkbox"/> 1015 0538 7226 5151	Blue Dream	Growing	19 days	Destruction Scheduled
<input type="checkbox"/> 1247 4788 1561 8932	Blue Dream	Growing	19 days	Destruction Scheduled
<input type="checkbox"/> 3950 0397 6735 2752	ChemDawg	Growing	17 days	
<input type="checkbox"/> 6493 8158 9999 4806	ChemDawg	Growing	17 days	
<input type="checkbox"/> 6622 1506 6081 5339	ChemDawg	Growing	17 days	
<input type="checkbox"/> 8790 8184 8294 5993	ChemDawg	Growing	17 days	
<input checked="" type="checkbox"/> 0814 0399 6294 6571	Northern Lights	Growing	0 days	

**Shortcuts**

**Stats** | **Strain**

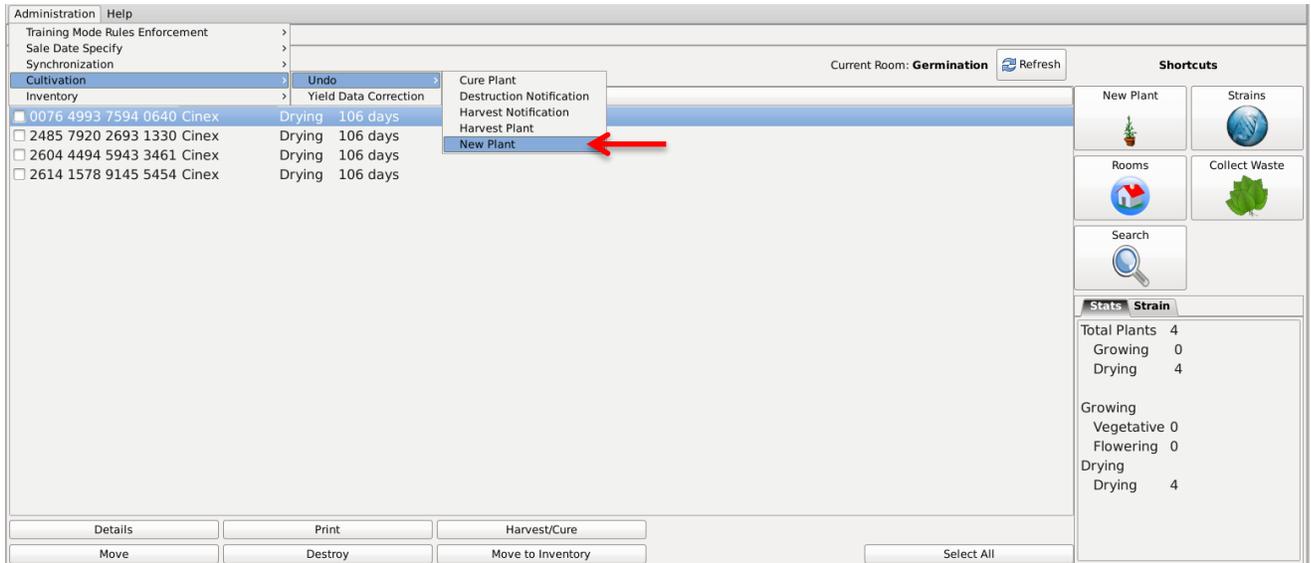
Total Plants 9  
 Growing 9  
 Drying 0

Growing  
 Vegetative 9  
 Flowering 0  
 Drying  
 Drvina 0

## Undo New Plant

An “Administrator” user may undo a new plant should it be necessary (e.g., the new plant action was committed to an incorrect clone).

- Click on the Administration menu near the top left corner of the window.
- Hover the cursor over “Cultivation”, “Undo”, and then click on “New Plant”.

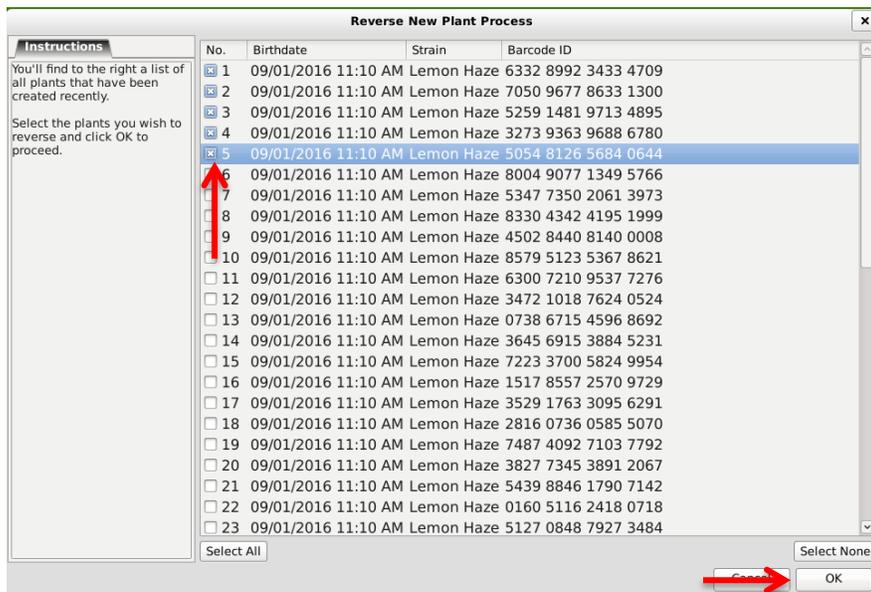


- The following pop-up window appears.

The 'Undo Choices' pop-up window has a title bar with a close button (X). It contains a 'Date' text box with the value '09/01/2016', a 'Strain' dropdown menu, and 'Cancel' and 'OK' buttons at the bottom.

- Select the date of the to-be-undone plant.
- To view all new plant(s) for a specific day, click “OK”.
- To narrow your results to new plant(s) of a specific strain, select a strain from the Strain drop down.

- A list of new plant(s) based on your search parameters from the prior pop-up window appears.
- Click the check box beside the plant(s) to be undone.
- Click “OK”.



- The ‘Confirm’ screen displays. Click the ‘Proceed’ button.

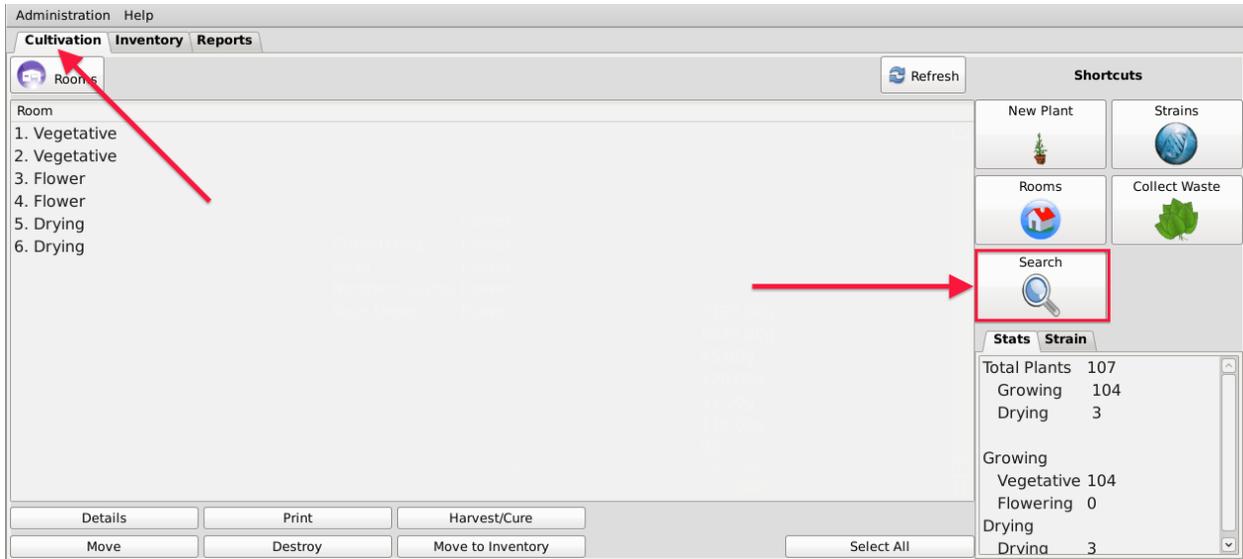


- The selected plants will be restored to the original inventory barcode and removed from the growhouse
- NOTE: If the inventory does not immediately reflect the change, click on the “Refresh” button found in the upper-right hand corner

## Looking up a Plant

To look up a specific plant,

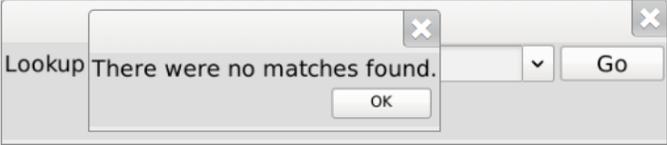
- Navigate to the “Cultivation” tab found in the top-left corner of the screen, and then click on the “Search” button located on the right-hand side of the home screen.



- This will bring up the Plant Lookup screen.

The screenshot shows the Plant Lookup screen. It features a "Lookup" field with a dropdown arrow, a "Go" button, and a "Clear" button. The "Go" button is highlighted with a red box and a red arrow.

- Within the Lookup field, type in either the plant’s 16-digit Traceability Identifier, or the plant’s strain. The Traceability Identifier may be typed with or without spaces. If searching by strain, you must spell the strain’s name correctly (not case sensitive).
- Click “Go”
  - If the Traceability Identifier entered is not correct or is not associated with your License, the following message will appear:



- If the Plant Identifier entered is correct and associated with your License, the Plant Information screen appears.

- If searching by Strain, then a list of all plants associated with your License that are of that strain will appear in a list. Double-click on any plant and the Plant Information screen for that specific plant will appear:

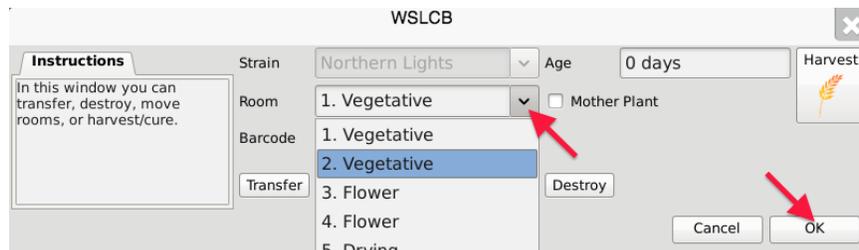
ID #	Strain	Room
8790 8184 8294 5993	ChemDawg	1. Vegetative
6622 1506 6081 5339	ChemDawg	1. Vegetative
3950 0397 6735 2752	ChemDawg	1. Vegetative
6493 8158 9999 4806	ChemDawg	1. Vegetative
0877 3223 0837 7802	ChemDawg	2. Vegetative
2010 5059 5210 2452	ChemDawg	2. Vegetative
3357 8029 2648 4340	ChemDawg	2. Vegetative
3794 5072 7344 2498	ChemDawg	2. Vegetative

## Moving Plants

You may move plant inventory from one plant room to another using either of two methods:

### Method 1

- Bring up the Plant Information screen for the plant to be moved, either by double-clicking the plant within its room or by using the Plant Lookup function described earlier.
- Select the destination room from the “Room” drop down



WSLCB

Instructions: In this window you can transfer, destroy, move rooms, or harvest/cure.

Strain: Northern Lights | Age: 0 days | Harvest

Room: 1. Vegetative | Mother Plant

Barcode: 1. Vegetative | Destroy

2. Vegetative

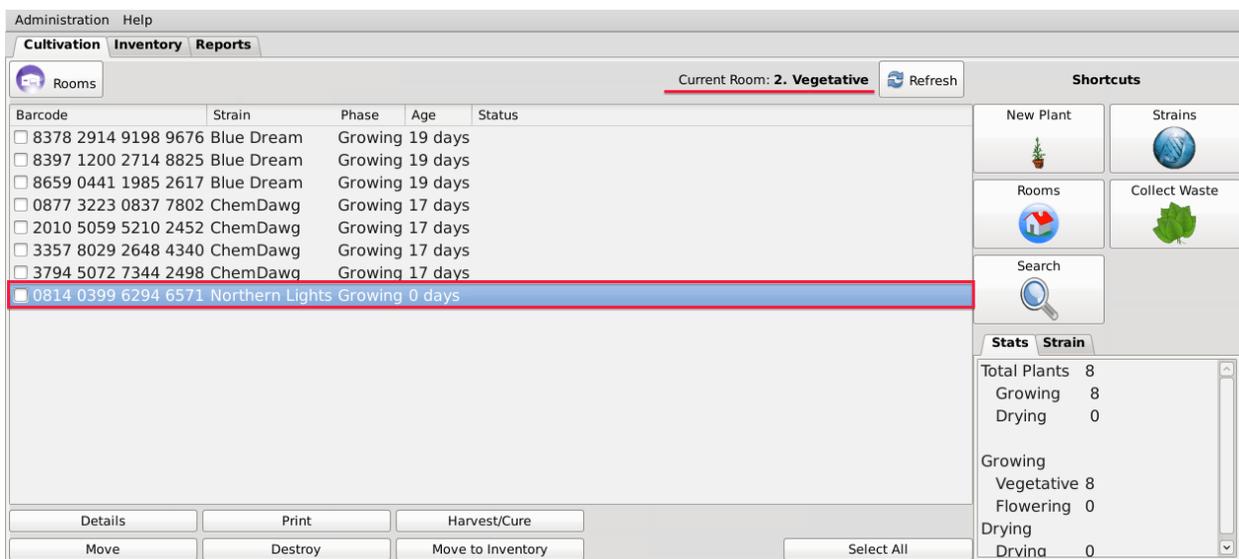
3. Flower

4. Flower

5. Drying

Cancel | OK

- Click “OK” when complete.



Administration Help

Cultivation Inventory Reports

Rooms | Current Room: 2. Vegetative | Refresh

Barcode	Strain	Phase	Age	Status
<input type="checkbox"/> 8378 2914 9198 9676	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8397 1200 2714 8825	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8659 0441 1985 2617	Blue Dream	Growing	19 days	
<input type="checkbox"/> 0877 3223 0837 7802	ChemDawg	Growing	17 days	
<input type="checkbox"/> 2010 5059 5210 2452	ChemDawg	Growing	17 days	
<input type="checkbox"/> 3357 8029 2648 4340	ChemDawg	Growing	17 days	
<input type="checkbox"/> 3794 5072 7344 2498	ChemDawg	Growing	17 days	
<input checked="" type="checkbox"/> 0814 0399 6294 6571	Northern Lights	Growing	0 days	

Shortcuts: New Plant, Strains, Rooms, Collect Waste, Search

Stats | Strain

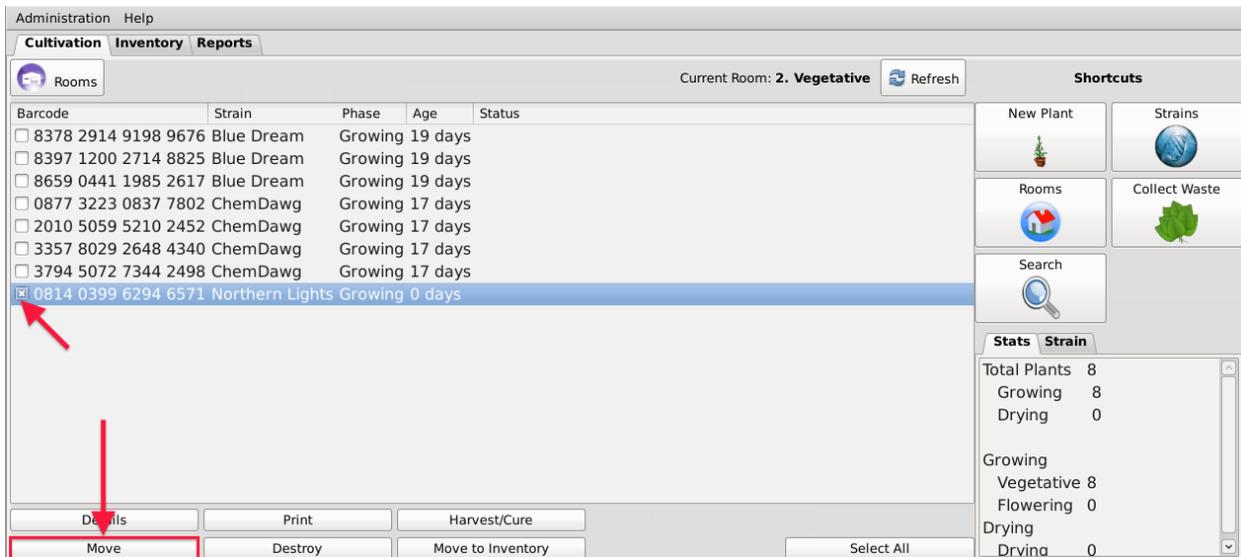
Total Plants	8
Growing	8
Drying	0
Growing	
Vegetative	8
Flowering	0
Drying	
Drying	0

Details | Print | Harvest/Cure | Move | Destroy | Move to Inventory | Select All

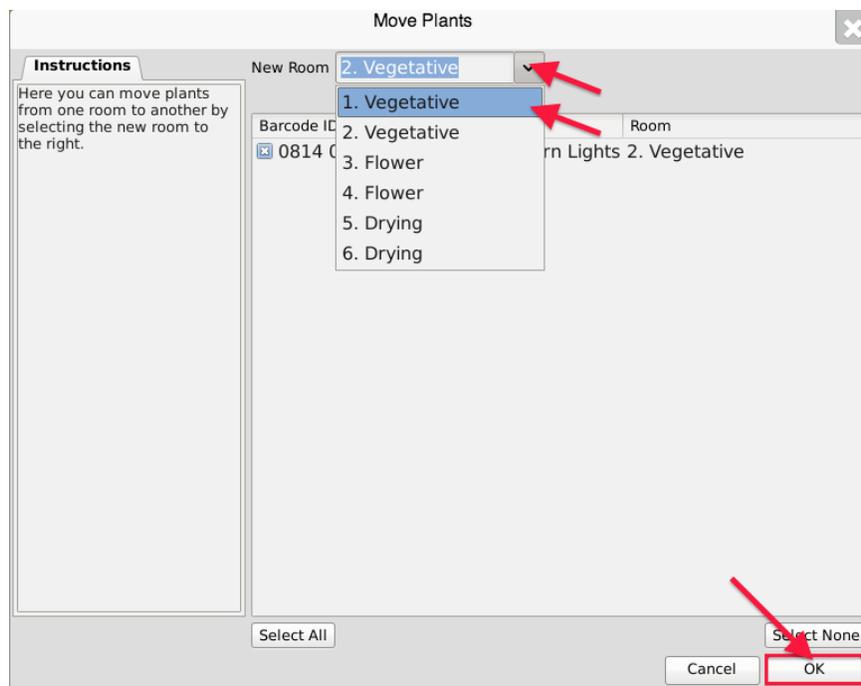
- You will now find that the plant has been moved to the room selected.

### Method 2

- Enter the room in which the plant(s) is(are) presently located.
- Click on the check box(es) to left of the plant identifier(s).
- Click on the “Move” button located at the bottom of the screen.



- When the Move Plant screen appears, select the destination room from the “New Room” drop down. Click “OK” when complete.



- You will now find that the plant has been moved to the room selected.

The screenshot shows the BiotrackTHC software interface. At the top, there are tabs for 'Administration' and 'Help'. Below that, there are tabs for 'Cultivation', 'Inventory', and 'Reports'. The current room is '1. Vegetative'. A table lists plants with columns for Barcode, Strain, Phase, Age, and Status. The selected plant is '0814 0399 6294 6571 Northern Lights Growing 0 days'. The sidebar on the right contains shortcuts for 'New Plant', 'Strains', 'Rooms', 'Collect Waste', and 'Search'. Below the shortcuts is a 'Stats' section showing 'Total Plants 9', 'Growing 9', and 'Drying 0'. At the bottom, there are buttons for 'Details', 'Print', 'Harvest/Cure', 'Move', 'Destroy', 'Move to Inventory', and 'Select All'.

Barcode	Strain	Phase	Age	Status
<input type="checkbox"/> 0958 9813 1393 1988	Blue Dream	Growing	19 days	
<input type="checkbox"/> 0975 4736 6122 4617	Blue Dream	Growing	19 days	
<input type="checkbox"/> 1015 0538 7226 5151	Blue Dream	Growing	19 days	Destruction Scheduled
<input type="checkbox"/> 1247 4788 1561 8932	Blue Dream	Growing	19 days	Destruction Scheduled
<input type="checkbox"/> 3950 0397 6735 2752	ChemDawg	Growing	17 days	
<input type="checkbox"/> 6493 8158 9999 4806	ChemDawg	Growing	17 days	
<input type="checkbox"/> 6622 1506 6081 5339	ChemDawg	Growing	17 days	
<input type="checkbox"/> 8790 8184 8294 5993	ChemDawg	Growing	17 days	
<input checked="" type="checkbox"/> 0814 0399 6294 6571	Northern Lights	Growing	0 days	

## Chapter 11: Plant Harvesting and Curing

In this chapter, you will learn how to:

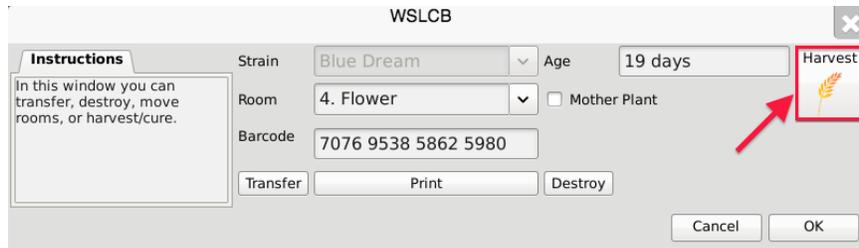
- ✓ Harvest plants
- ✓ Undo Harvest
- ✓ Schedule Harvest
- ✓ Undo Harvest Notification
- ✓ Cure plants
- ✓ Undo Cure

### Plant Harvest

This function will notify the Traceability System of the intent to begin harvesting a plant. You may perform this action using either of two methods:

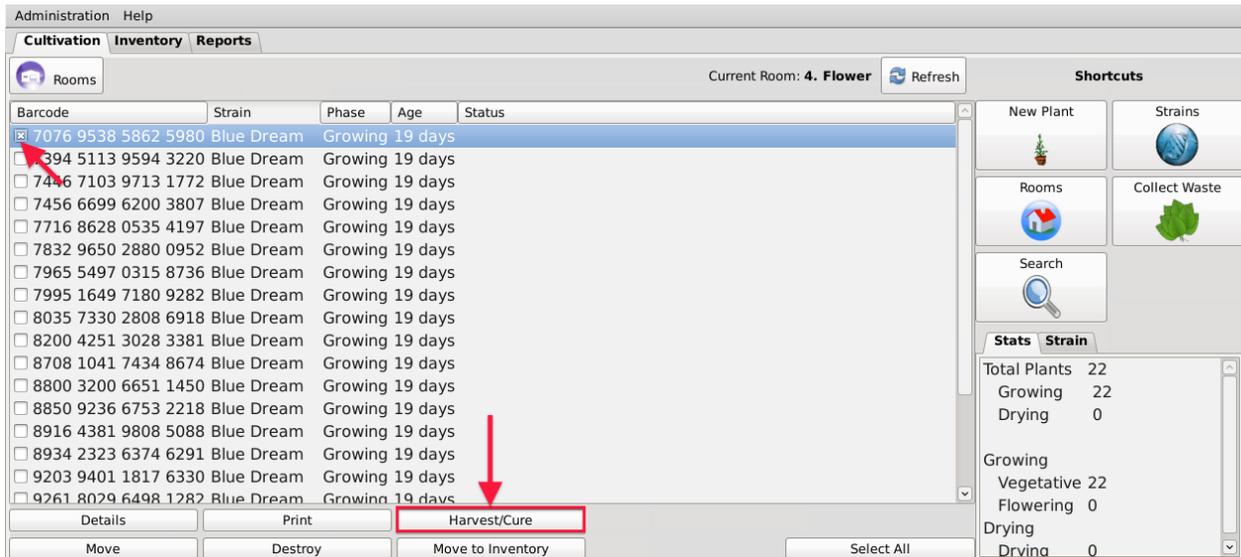
#### Method 1

- Bring up the Plant Information screen for the plant to be harvested, either by double-clicking the plant within its room or by using the Plant Lookup function described earlier.
- Click on the "Harvest" button.



## Method 2

- From the Room screen, select the plant(s) to be harvested and click on the “Harvest/Cure” button found at the bottom of the screen.



Note: Multiple plants of the same strain may be harvested together by checking the boxes next to each plant.

## Plant Harvest

- Regardless of which method you use, a pop-up window will appear asking you to confirm the harvest for that plant
- Once confirmed, the Harvest Weight screen appears:

Wet Weight ✕

**Instructions**

Enter the flower weight, other material, waste and then click OK.

ID	<input type="text" value="7076 9538 5862 5980"/>
Strain	<input type="text" value="Blue Dream"/>
<b>Flower Wet Weight</b>	<input type="text"/>
Other Material	<input type="text"/>
Waste	<input type="text"/>
<input type="checkbox"/> Additional Collections	

- Flower Wet Weight: Enter the harvest weight of the plant's flower.
  - Other Material: Enter the harvest weight of the plant's non-flower matter (trim, leaves, or other plant matter).
  - Waste: Enter in the harvest weight of the plant's harvest-specific waste.
  - Additional Collections: If the plant is being fully harvested, leave this box unchecked. If this is a partial harvest and you intend on collecting additional material from this plant at a later date, make sure to check this box.
- Once the weights have been entered, click "Finish". The Traceability System will automatically change the Phase of the plant to "Drying".

Administration Help

**Cultivation** Inventory Reports

Rooms Current Room: 4. Flower Refresh

Barcode	Strain	Phase	Age	Status
<input checked="" type="checkbox"/> 7076 9538 5862 5980	Blue Dream	Drying	19 days	
<input type="checkbox"/> 7394 5113 9594 3220	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7446 7103 9713 1772	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7456 6699 6200 3807	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7716 8628 0535 4197	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7832 9650 2880 0952	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7965 5497 0315 8736	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7995 1649 7180 9282	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8035 7330 2808 6918	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8200 4251 3028 3381	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8708 1041 7434 8674	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8800 3200 6651 1450	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8850 9236 6753 2218	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8916 4381 9808 5088	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8934 2323 6374 6291	Blue Dream	Growing	19 days	
<input type="checkbox"/> 9203 9401 1817 6330	Blue Dream	Growing	19 days	
<input type="checkbox"/> 9261 8029 6498 1282	Blue Dream	Growing	19 days	

**Shortcuts**

New Plant

Strains

Rooms

Collect Waste

Search

**Stats** **Strain**

Total Plants 22

Growing 21

Drying 1

Growing

Vegetative 21

Flowering 0

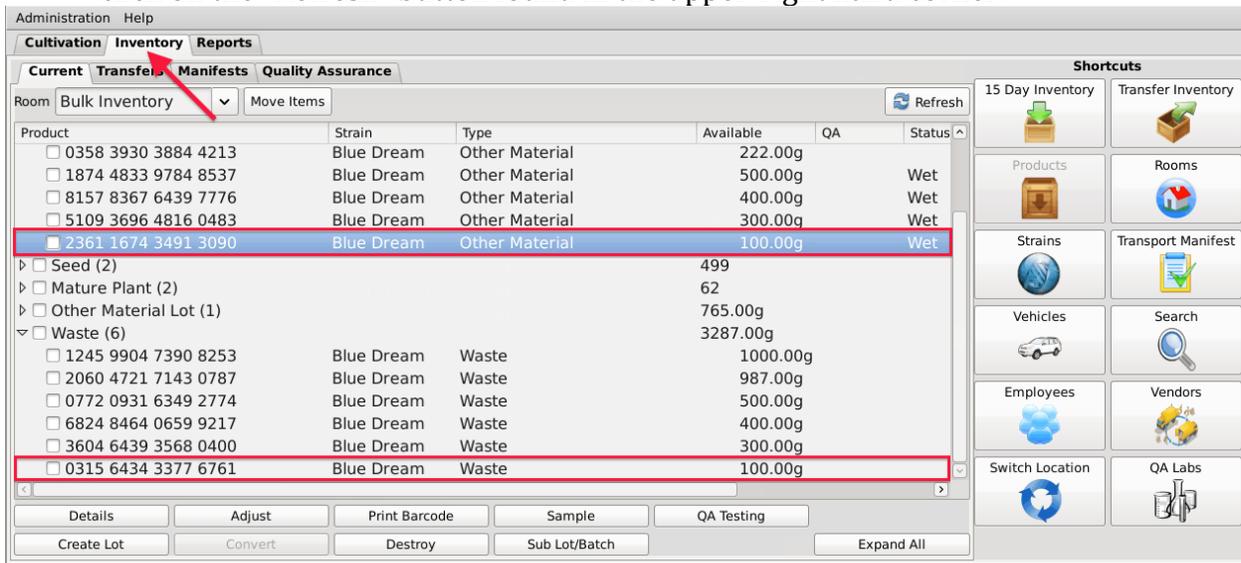
Drying

Drying 1

- **NOTE: Wet flower material remains under the "Cultivation" tab until a dry weight is taken, at which point it will be moved to the "Inventory" tab and may be treated as any other inventory item. "If wet flower is to be transferred to a Processor, check "Dry in another licensed facility" and wet flower will be moved into the inventory for transfer**



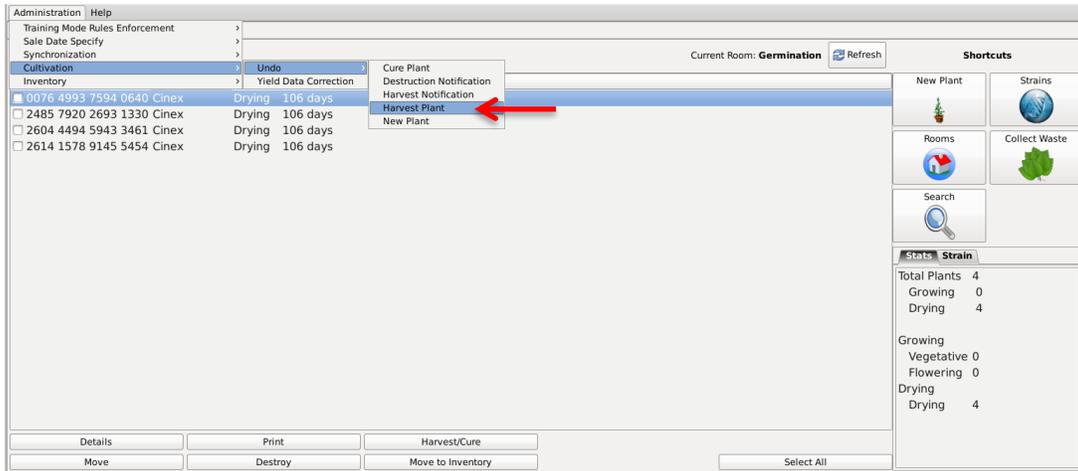
- The Traceability System will, however, automatically account for each of the other two components (Other Material, and Waste) as separate inventory items, generate new Traceability Identifiers for each, and move those items to the “Inventory” tab under their respective product groupings.
- NOTE: If the inventory items are not immediately locatable within the Inventory tab, click on the “Refresh” button found in the upper-right hand corner.



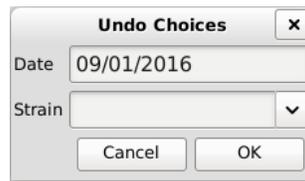
## Undo Plant Harvest

An “Administrator” user may undo the Harvest status of a plant should it be necessary (e.g., the harvest action was committed to an incorrect plant).

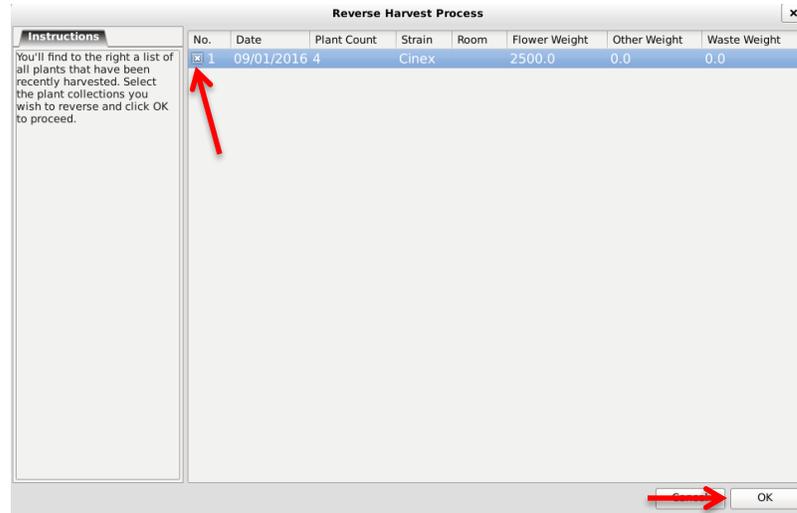
- Click on the Administration menu near the top left corner of the window.
- Hover the cursor over “Cultivation”, “Undo”, and then click on “Harvest Plant”.



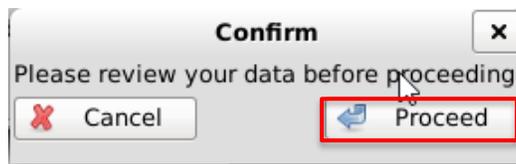
- The following pop-up window appears.



- Select the date of the to-be-undone harvest.
  - To view all harvests for a specific day, click "OK".
  - To narrow your results to scheduled harvests of a specific strain, select a strain from the Strain drop down.
- A list of scheduled harvests based on your search parameters from the prior pop-up window appears.
  - Click the check box beside the plant(s) for which the scheduled harvest(s) is(are) to be undone.
  - Click "OK".



- The 'Confirm' screen displays. Click the 'Proceed' button.



- The "Drying" status of the selected plants will be removed.
- NOTE: If the plant's status is not immediately adjusted, click on the "Refresh" button found in the upper-right hand corner

### Plant Harvest (Schedule Only)

If you are scheduling the harvest but are not ready to enter the harvest weights, clicking the "Cancel" button within the Harvest Weight pop up will change the Status of the plant to "Harvest Scheduled".

**Wet Weight** ✕

**Instructions**

Enter the flower weight, other material, waste and then click OK.

ID

Strain

**Flower Wet Weight**

Waste

Other Material

Additional Collections

Administration Help

**Cultivation** Inventory Reports

Rooms Current Room: 4. Flower Refresh

Barcode	Strain	Phase	Age	Status
<input type="checkbox"/> 7076 9538 5862 5980	Blue Dream	Drying	19 days	
<input checked="" type="checkbox"/> 7394 5113 9594 3220	Blue Dream	Growing	19 days	Harvest Scheduled
<input type="checkbox"/> 7446 7103 9713 1772	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7456 6699 6200 3807	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7716 8628 0535 4197	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7832 9650 2880 0952	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7965 5497 0315 8736	Blue Dream	Growing	19 days	
<input type="checkbox"/> 7995 1649 7180 9282	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8035 7330 2808 6918	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8200 4251 3028 3381	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8708 1041 7434 8674	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8800 3200 6651 1450	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8850 9236 6753 2218	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8916 4381 9808 5088	Blue Dream	Growing	19 days	
<input type="checkbox"/> 8934 2323 6374 6291	Blue Dream	Growing	19 days	
<input type="checkbox"/> 9203 9401 1817 6330	Blue Dream	Growing	19 days	
<input type="checkbox"/> 9261 8029 6498 1282	Blue Dream	Growing	19 days	

**Shortcuts**

New Plant

Strains

Rooms

Collect Waste

Search

**Stats** **Strain**

Total Plants 22

Growing 21

Drying 1

Growing

Vegetative 21

Flowering 0

Drying

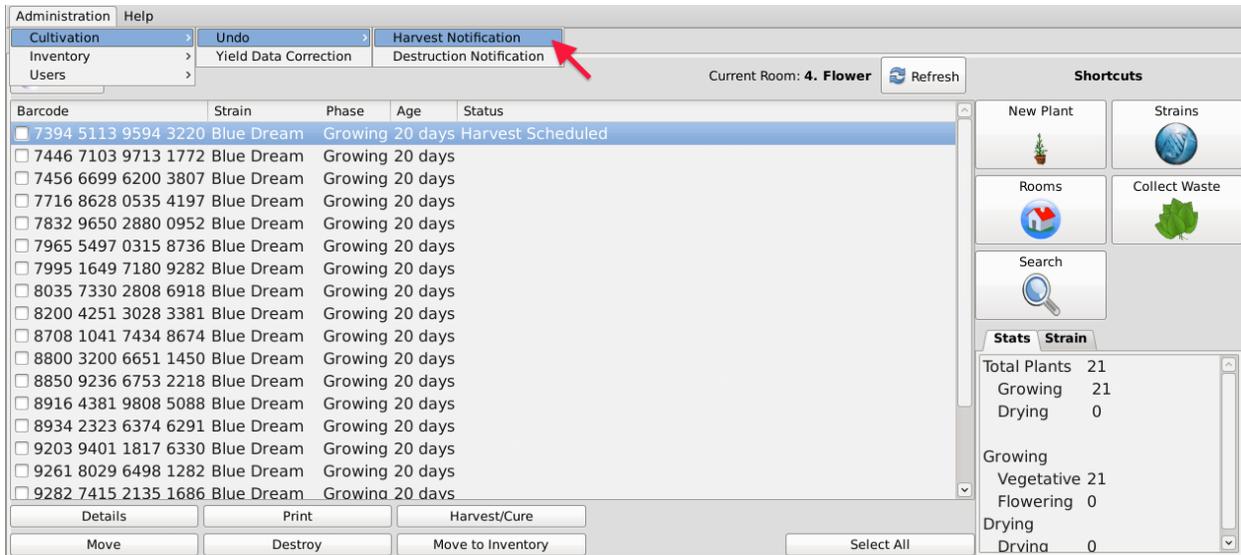
Drying 1

- Whenever you are ready to enter the harvest weights into the Traceability System, simply select the plant and go through the harvest process as described in the above Plant Harvest section.

### Undo Plant Harvest Schedule

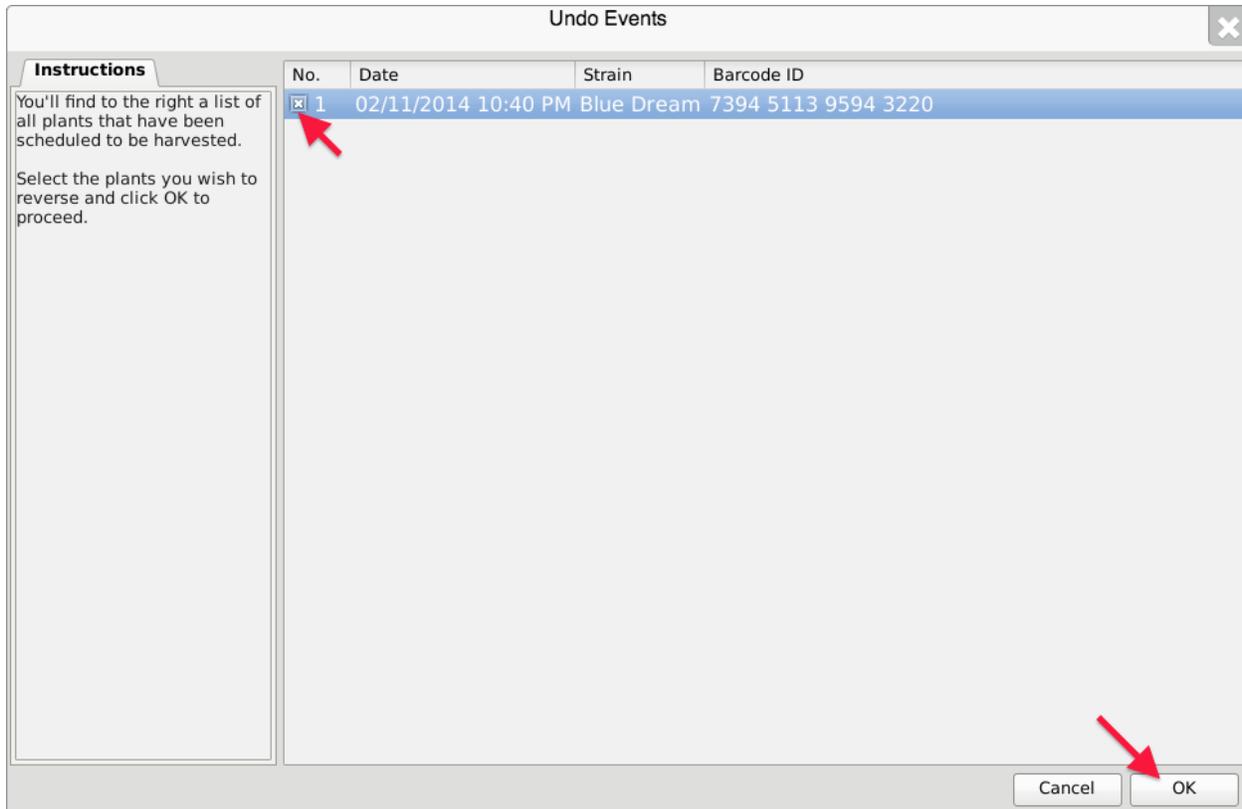
An “Administrator” user may remove the “Harvest Scheduled” status of a plant should it be necessary (e.g., the harvest action was committed to an incorrect plant).

- Click on the Administration menu near the top left corner of the window.
- Hover the cursor over “Cultivation”, “Undo”, and then click on “Harvest Notification”.



- The following pop-up window appears.

- Select the date of the to-be-undone scheduled harvest.
  - To view all scheduled harvests for a specific day, click “OK”.
  - To narrow your results to scheduled harvests of a specific strain, select a strain from the Strain drop down.
- A list of scheduled harvests based on your search parameters from the prior pop-up window appears.
  - Click the check box beside the plant(s) for which the scheduled harvest(s) is(are) to be undone.
  - Click “OK”.



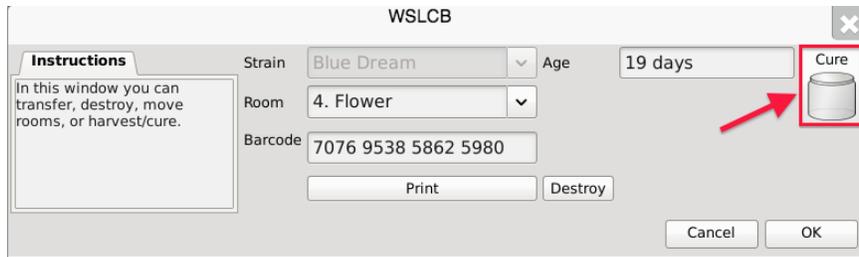
- The “Harvest Scheduled” status of the selected plants will be removed.
- NOTE: If the plant’s status is not immediately adjusted, click on the “Refresh” button found in the upper-right hand corner.

### Plant Cure

This function will notify the Traceability System of the completed curing a plant. You may perform this action using either of two methods:

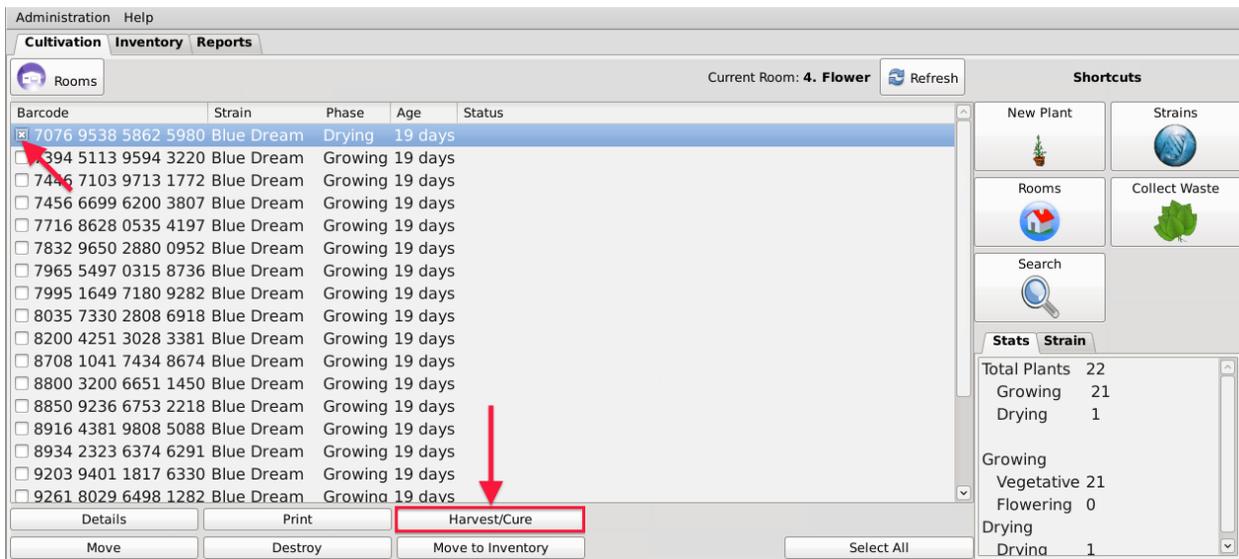
#### Method 1

- Bring up the Plant Information screen for the plant scheduled for cure, either by double-clicking the plant within its room or by using the Plant Lookup function described earlier.
- Click on “Cure”. Note that the plant’s phase must be “Drying” in order for the plant to be cured.



## Method 2

- From the Room screen, select the plant to be cured and click on the “Harvest/Cure” button found at the bottom of the screen. Note that the plant’s phase must be “Drying” in order for the plant to be cured.

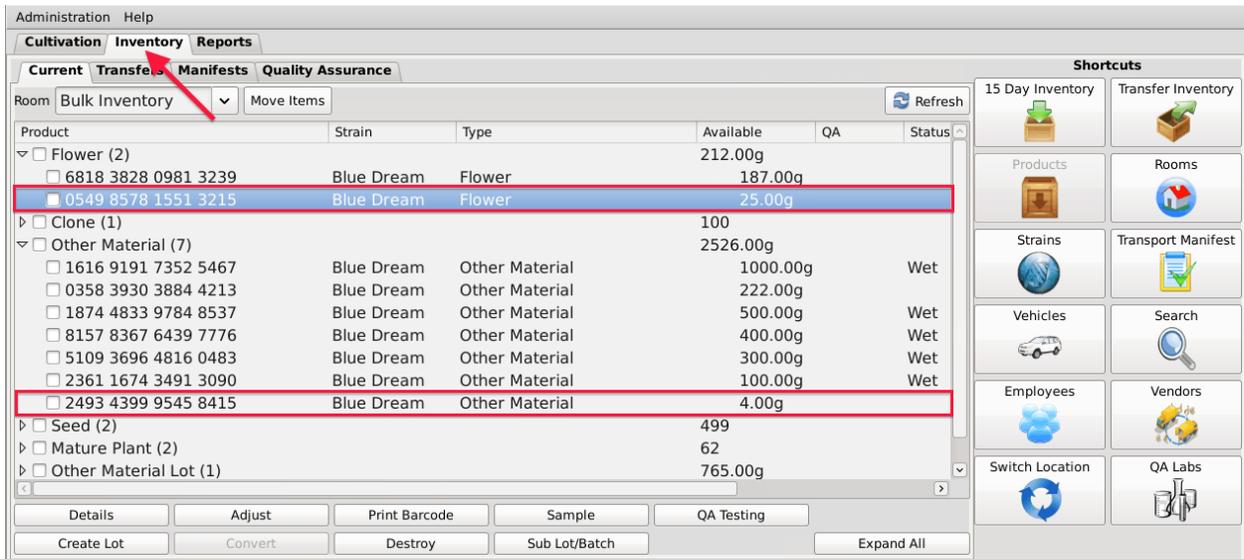


## Plant Cure

- Regardless of which method you use, a pop-up window will appear asking you to confirm the cure for that plant.
- Once confirmed, the Dry Weight window appears.

The screenshot shows a 'Dry Weight' dialog box. It contains an 'Instructions' section on the left and a form on the right. The form includes fields for ID, Strain, Flower, Waste, and Other Material, along with an 'Additional Collections' checkbox. 'Cancel' and 'Finish' buttons are at the bottom.

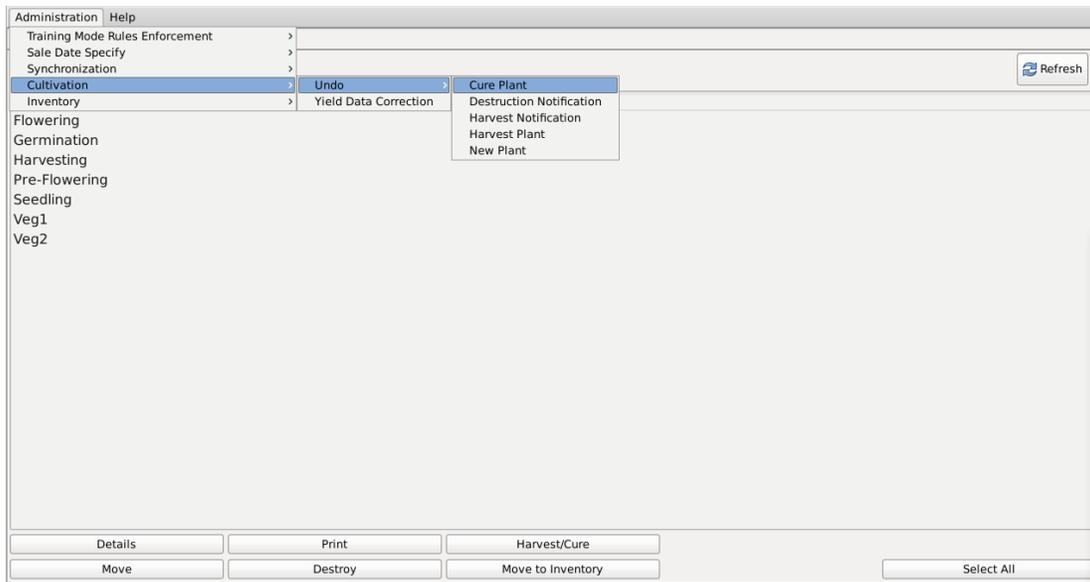
- **Flower:** Enter the dry weight of the flower.
  - **Other Material:** Enter the weight of any *additional* non-flower matter (trim, leaves, or other plant matter) attributable to the curing process, if applicable.
  - **Waste:** Enter the weight of *additional* waste attributable to the curing process, if applicable.
- Once the weights have been entered, click “Finish”.
  - Once the dry weights have been submitted, the Traceability System will automatically account for each of the three components (Flower, Other Material, and Waste) as separate inventory items, generate new Traceability Identifiers for each, and move the items to the “Inventory” tab under their respective product groupings.
  - NOTE: If the inventory items are not immediately locatable within the Inventory tab, click on the “Refresh” button found in the upper-right hand corner.



## Undo Cure Plant

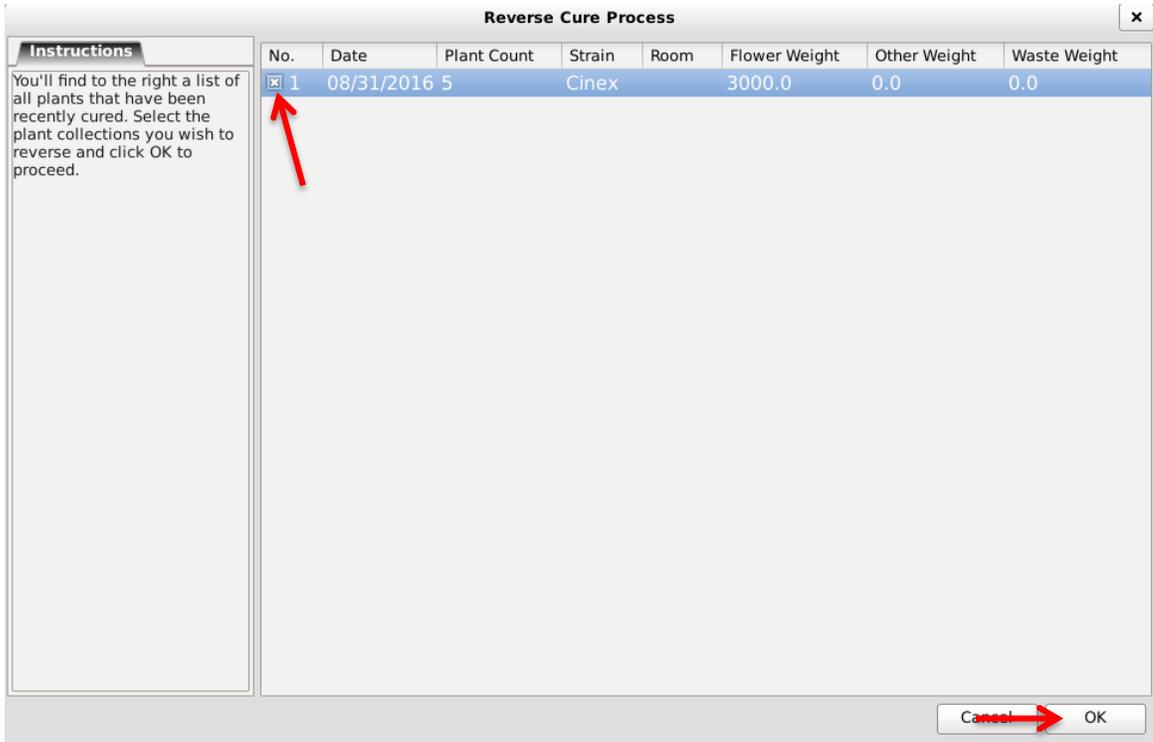
An “Administrator” user may undo curing a plant should it be necessary (e.g., the incorrect cure weight was entered incorrectly).

- Click on the Administration menu near the top left corner of the window.
- Hover the cursor over “Cultivation”, “Undo”, and then click on “Cure Plant”.

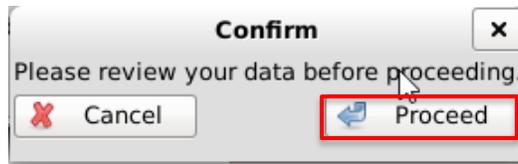


- The following pop-up window appears.





- The 'Confirm' screen displays. Click the 'Proceed' button.



- The selected plants will be restored and the inventory produced from the cure removed.
- NOTE: If the plant's do not immediately reappear, click on the "Refresh" button found in the upper-right hand corner

### Inventory Items Resulting from Harvesting and Curing

After both the harvesting and curing processes are complete, the following items may be found within the "Inventory" tab:

- Other Material: Non-flower material collected during the *harvest* process. Entered as a wet weight.
- Waste: Waste material collected during the harvest process. Entered as a wet weight.

- Other Material: Additional non-flower material collected during the *curing* process, if applicable. Entered as a dry weight.
- Waste: Additional waste material collected during the *curing* process, if applicable.
- Flower: Entered as a dry weight.



## Chapter 12: Producer Inventory Basics

In this chapter, you will learn how to:

- ✓ Create a Flower Lot or Other Material Lot
- ✓ Create a Flower Lot Designated as Medical Product
- ✓ Create a Flower Sub-Lot or Other Material Sub-Lot
- ✓ Move inventory between inventory rooms

### Create Lot

This function will notify the Traceability System of the creation of a flower lot from cured flower or an other material lot from cured other material. **Though the example screen shots illustrate the creation of a flower lot, creation of an other material lot follows the same path.**

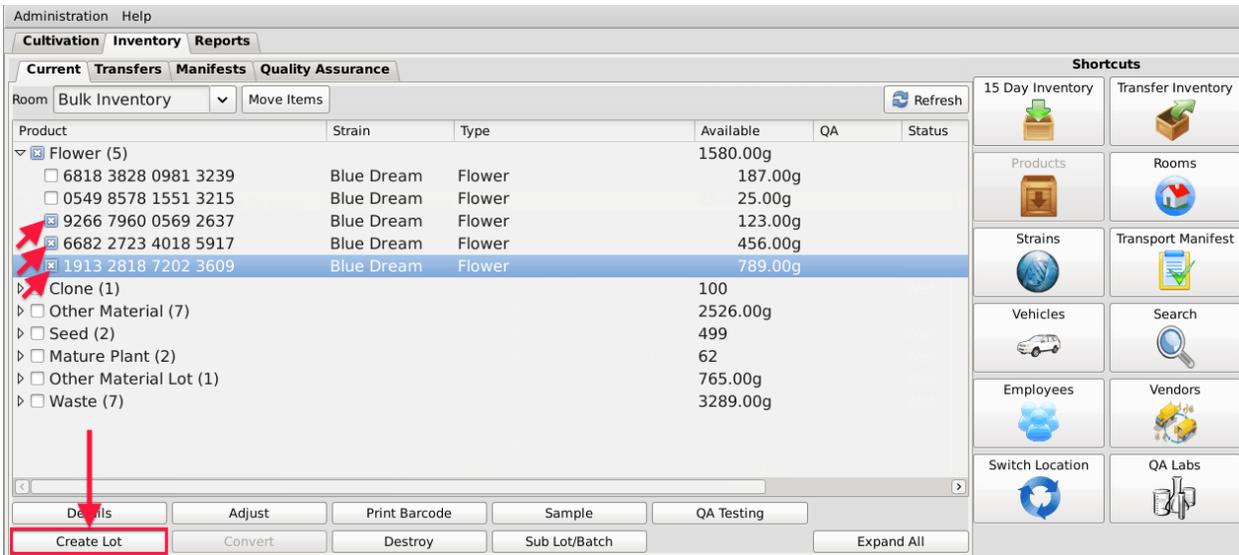
- Navigate to the Inventory Room within which the post-harvest/cure inventory is located (make sure that you are within the Inventory tab and the Current sub-tab).
- If the product groups are collapsed, click on the expand arrow to view all of the available inventory.

Product	Strain	Type	Available	QA	Status
<input checked="" type="checkbox"/> Flower (5)			1580.00g		
<input type="checkbox"/> 6818 3828 0981 3239	Blue Dream	Flower	187.00g		
<input type="checkbox"/> 0549 8578 1551 3215	Blue Dream	Flower	25.00g		
<input type="checkbox"/> 9266 7960 0569 2637	Blue Dream	Flower	123.00g		
<input type="checkbox"/> 6682 2723 4018 5917	Blue Dream	Flower	456.00g		
<input type="checkbox"/> 1913 2818 7202 3609	Blue Dream	Flower	789.00g		
<input type="checkbox"/> Clone (1)			100		
<input type="checkbox"/> Other Material (7)			2526.00g		
<input type="checkbox"/> Seed (2)			499		
<input type="checkbox"/> Mature Plant (2)			62		
<input type="checkbox"/> Other Material Lot (1)			765.00g		
<input type="checkbox"/> Waste (7)			3289.00g		

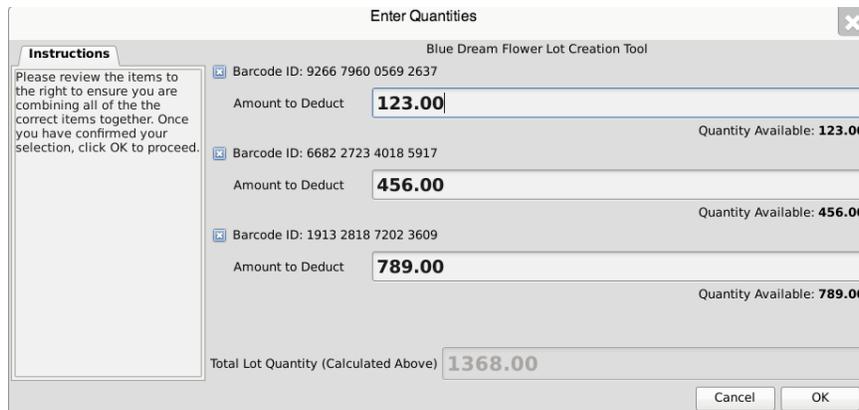
- Click on the check box(es) to left of the item(s) to be made into a Lot

**NOTE: All inventory to be included in a Lot must be of the same strain and same type (flower or other material).**

- Once all of the cured inventory to be included in the Lot have been selected, click on the “Create Lot” button at the bottom of the screen.



- The Lot Creation Tool then appears. This screen summarizes all of the relevant information for the to-be-created Lot, including: the Traceability Identifier of each inventory item, the Quantity Available for use from each item, the Amount to Deduct from each item that is going into the Lot, and the Total Lot Quantity which will be the final weight of the Lot. By default, the Traceability System assumes that you are fully combining each item into the Lot.



- If necessary, adjust the amounts within the Amount to Deduct fields so that Traceability System numbers match what is actually being combined into the Lot.
- When complete, click “OK”.

**Enter Quantities** (Blue Dream Flower Lot Creation Tool)

**Instructions:** Please review the items to the right to ensure you are combining all of the the correct items together. Once you have confirmed your selection, click OK to proceed.

Barcode ID	Amount to Deduct	Quantity Available
9266 7960 0569 2637	123.00	123.00
6682 2723 4018 5917	456.00	456.00
1913 2818 7202 3609	789.00	789.00

Total Lot Quantity (Calculated Above): **1368.00**

Buttons: Cancel, **OK**

- The newly created Lot may now be found within the same room under the “Flower Lot” or the “Other Material Lot” group, whichever is applicable.

Administration Help

**Cultivation Inventory Reports**

Current Transfers Manifests Quality Assurance

Room: Bulk Inventory Move Items Refresh

Product	Strain	Type	Available	QA	Status
▶ <input type="checkbox"/> Flower (2)			212.00g		
▶ <input type="checkbox"/> Clone (1)			100		
▶ <input type="checkbox"/> Other Material (7)			2526.00g		
▶ <input type="checkbox"/> Seed (2)			499		
▶ <input type="checkbox"/> Mature Plant (2)			62		
▼ <input type="checkbox"/> Flower Lot (2)			1368.00g		
<input checked="" type="checkbox"/> 0000 0001 0000 0096	Blue Dream	Flower Lot	1368.00g		
▶ <input type="checkbox"/> Other Material Lot (1)			765.00g		
▶ <input type="checkbox"/> Waste (7)			3289.00g		

Shortcuts: 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, QA Labs

Buttons: Details, Adjust, Print Barcode, Sample, QA Testing, Create Lot, Convert, Destroy, Sub Lot/Batch, Expand All

## Create Medically Compliant Lot

This function will notify the Traceability System of the creation of a flower lot from cured flower designated for medical purposes. Flower to be designated as medical must be tested for heavy metals and pesticides **before** lot creation.

- Navigate to the Inventory Room within which the post-harvest/cure inventory is located (make sure that you are within the Inventory tab and the Current sub-tab).
- If the product groups are collapsed, click on the expand arrow to view the entire available inventory.
- Click on the check box(es) to left of the item(s) to be made into a Lot
- Once the entire cured inventory to be included in the Lot has been selected, click on the “Create Lot” button at the bottom of the screen.

Product	Strain	Type	Available	QA	Medical Product	Potency	Status
<input type="checkbox"/> Kief (3)			250.00g				
<input checked="" type="checkbox"/> Flower (7)			19493.00g				
<input type="checkbox"/> 1769 1097 9767 4198	Blackberry Kush	Flower	1233.00g				
<input type="checkbox"/> 2707 6397 3676 8661	Blue Dream	Flower	5534.00g				
<input type="checkbox"/> 1894 8289 4147 7041	Cinderella 99	Flower	1466.00g				
<input checked="" type="checkbox"/> 1029 8686 2582 7066	Cinex	Flower	3027.00g				
<input type="checkbox"/> 7952 0648 1054 0549	Cinex	Flower	3000.00g				
<input type="checkbox"/> 3699 0608 7904 8326	Girl Scout Cookies	Flower	2733.00g				
<input type="checkbox"/> 4135 7123 2896 6455	Girl Scout Cookies	Flower	2500.00g				
<input type="checkbox"/> Clone (11)			5				
<input type="checkbox"/> Other Material (9)			8265.00g				
<input type="checkbox"/> Seed (1)			100				
<input type="checkbox"/> Mature Plant (19)			8				
<input type="checkbox"/> Flower Lot (26)			15769.00g				
<input type="checkbox"/> Other Material Lot (4)			14732.00g				
<input type="checkbox"/> Bubble Hash (3)			200.00g				
<input type="checkbox"/> Hydrocarbon Wax (2)			601.00g				
<input type="checkbox"/> Food Grade Solvent Extract (3)			1000.00g				
<input type="checkbox"/> Solid Marijuana Infused Edible (2)			250				
<input type="checkbox"/> Liquid Marijuana Infused Edible (1)			200				

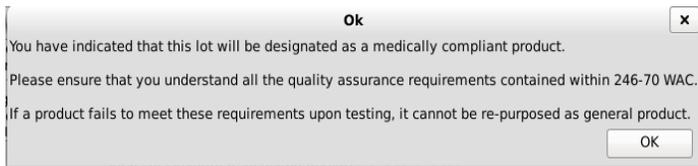
### **NOTE: All inventory to be included in a Lot must be of the same strain**

- The Lot Creation Tool then appears. This screen summarizes all of the relevant information for the to-be-created Lot, including: the Traceability Identifier of each inventory item, the Quantity Available for use from each item, the Amount to Deduct from each item that is going into the Lot, and the Total Lot Quantity which will be the final weight of the Lot. By default, the Traceability System assumes that you are fully combining each item into the Lot.

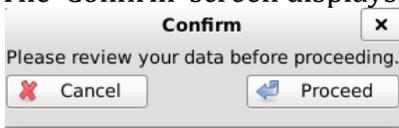
- If necessary, adjust the amounts within the Amount to Deduct field(s) so that Traceability System numbers match what is actually being combined into the Lot.
- Check the box for “Designate as Medical Compliant Product”
- When complete, click “OK”.



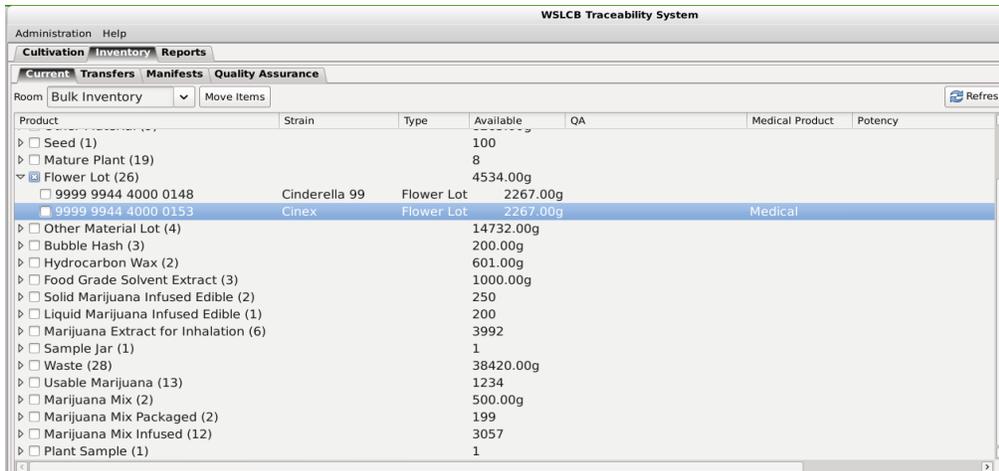
- The following warning will appear. If your flower meets the requirements click ‘OK’



- The ‘Confirm’ screen displays. Click the ‘Proceed’ button.



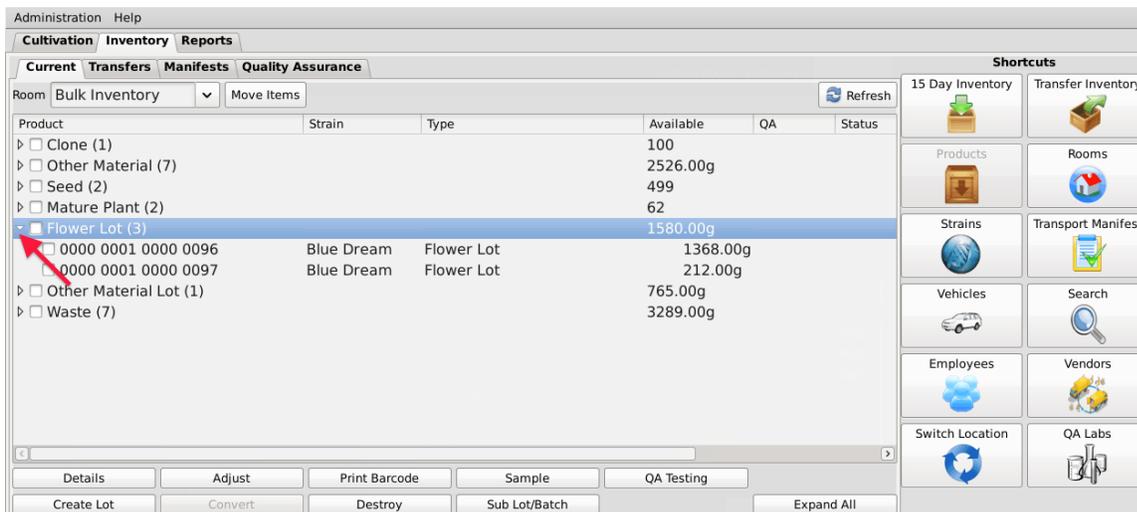
- The newly created Lot may now be found within the same room under the “Flower Lot” group and will now be designated as Medical under the ‘Medical Product’ column.



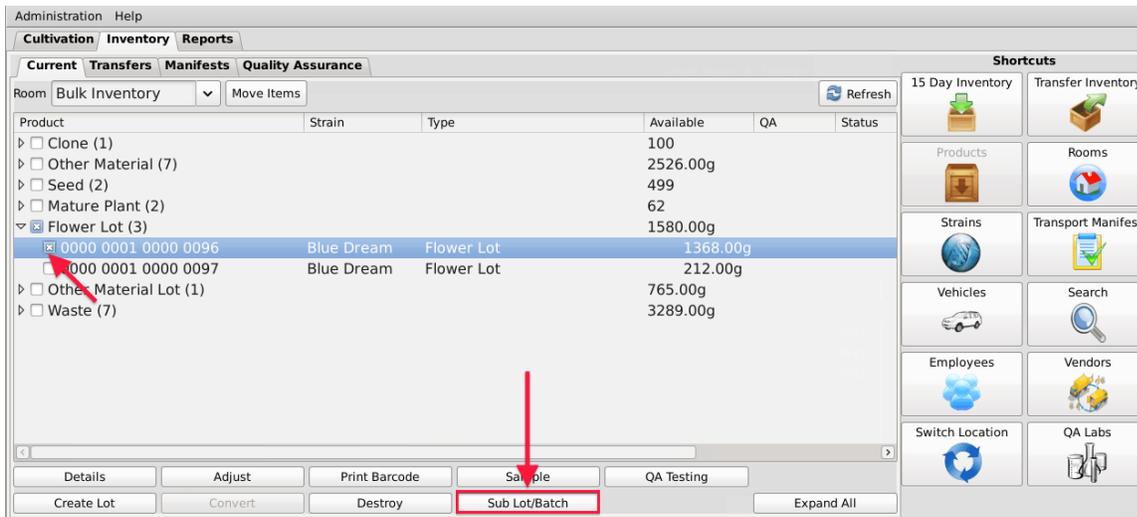
## Create Sub-Lot

This function will notify the Traceability System of the creation of a flower sub-lot from a flower lot or an other material sub-lot from an other material lot. This may be appropriate when a Producer sells a partial lot to a Processor. Though the example screen shots illustrate the creation of a flower sub-lot, creation of an other material sub-lot follows the same path.

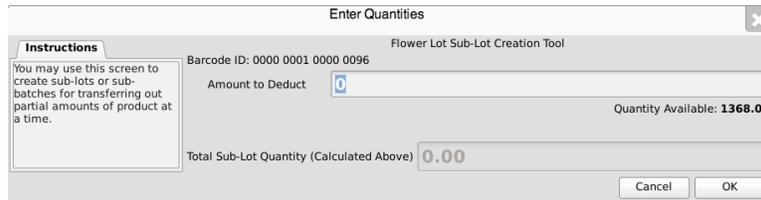
- Navigate to the Inventory Room within which the Lot is located (make sure that you are within the Inventory tab and the Current sub-tab).
- If the product groups are collapsed, click on the expand arrow to view all of the available inventory.



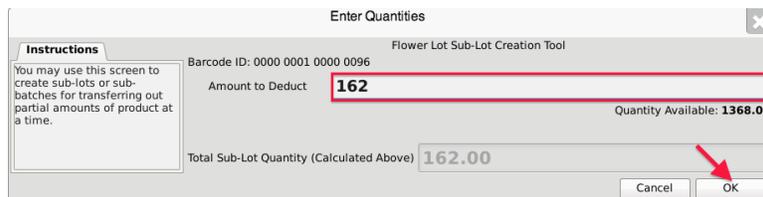
- Click on the check box to the left of the Lot to be made into a Sub-Lot.
- Click on the “Sub Lot/Batch” button at the bottom of the screen.



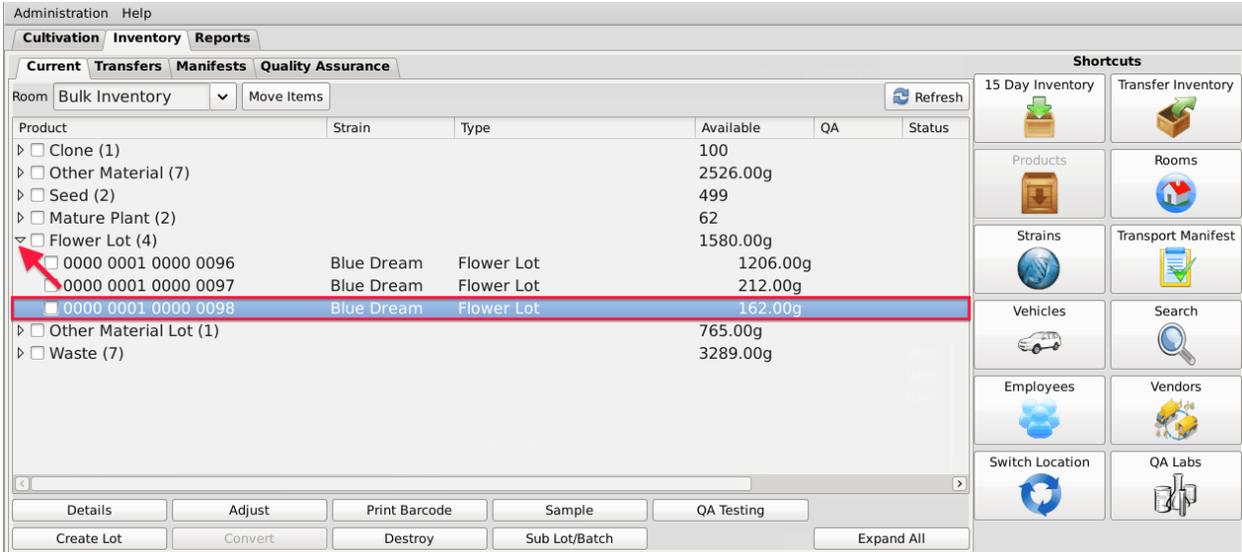
- The Sub-Lot Creation Tool then appears. This screen summarizes all of the relevant information for the to-be-created Sub-Lot, including: the Traceability Identifier of source Lot, the Quantity Available for use from the source Lot, the Amount to Deduct from the source Lot that is going into the Sub-Lot, and the Total Sub-Lot Quantity which will be the final weight of the Sub-Lot.



- Enter the appropriate amount within the Amount to Deduct field.
- When complete, click "OK".



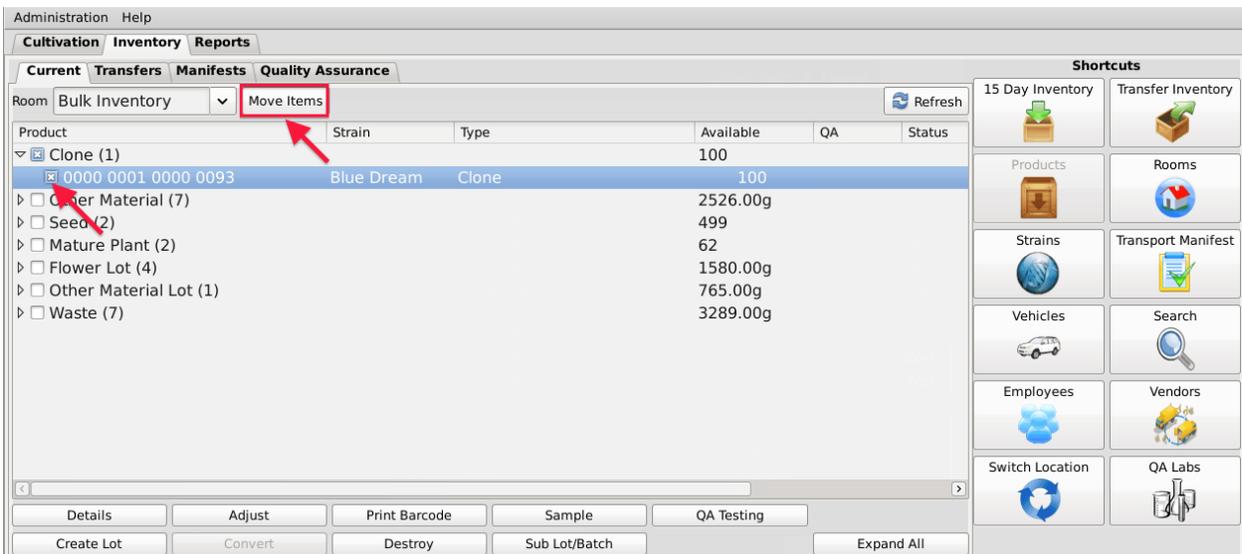
- The newly created Sub-Lot may now be found within the same room under the same group (either "Flower Lot" or "Other Material Lot") as the source Lot.



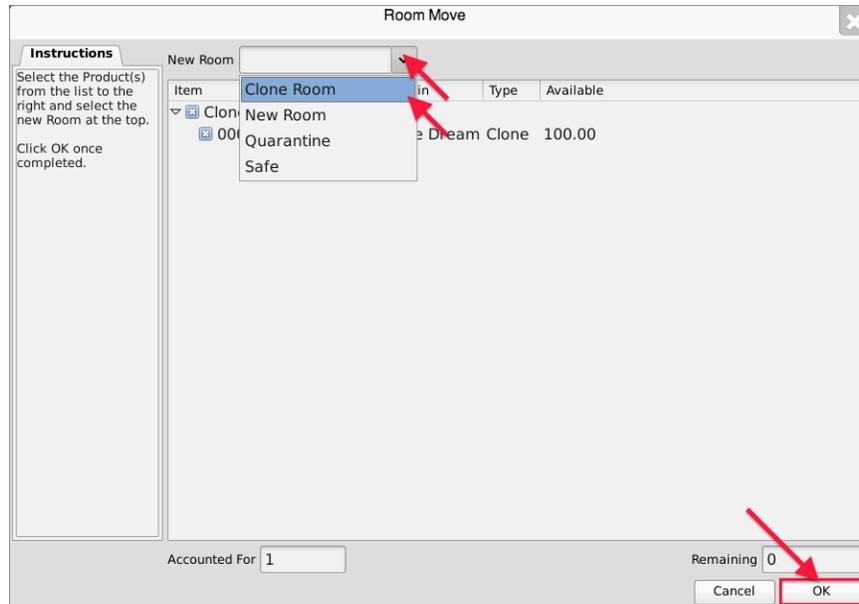
## Move Inventory

You may move inventory from one inventory room to another using the following method:

- Navigate to the Inventory Room within which the inventory is presently located (make sure that you are within the Inventory tab and the Current sub-tab).
- Click on the check box to left of the inventory item.
- Click on the “Move Items” button



- When the Move Inventory pop up appears, select the destination room from the New Room drop down.
- Click “OK” when complete.



- You will now find that the plant has been moved to the room selected.

Administration Help

**Cultivation** **Inventory** **Reports**

**Current** **Transfers** **Manifests** **Quality Assurance**

Room: Clone Room

Product	Strain	Type	Available	QA	Status
☐ Clone (1)			100		
☐ 0000 0001 0000 0093	Blue Dream	Clone	100		

Shortcuts

- 15 Day Inventory
- Transfer Inventory
- Products
- Rooms
- Strains
- Transport Manifest
- Vehicles
- Search
- Employees
- Vendors
- Switch Location
- QA Labs

Details Adjust Print Barcode Sample QA Testing

Create Lot Convert Destroy Sub Lot/Batch Expand All



## Chapter 13: Lab Testing

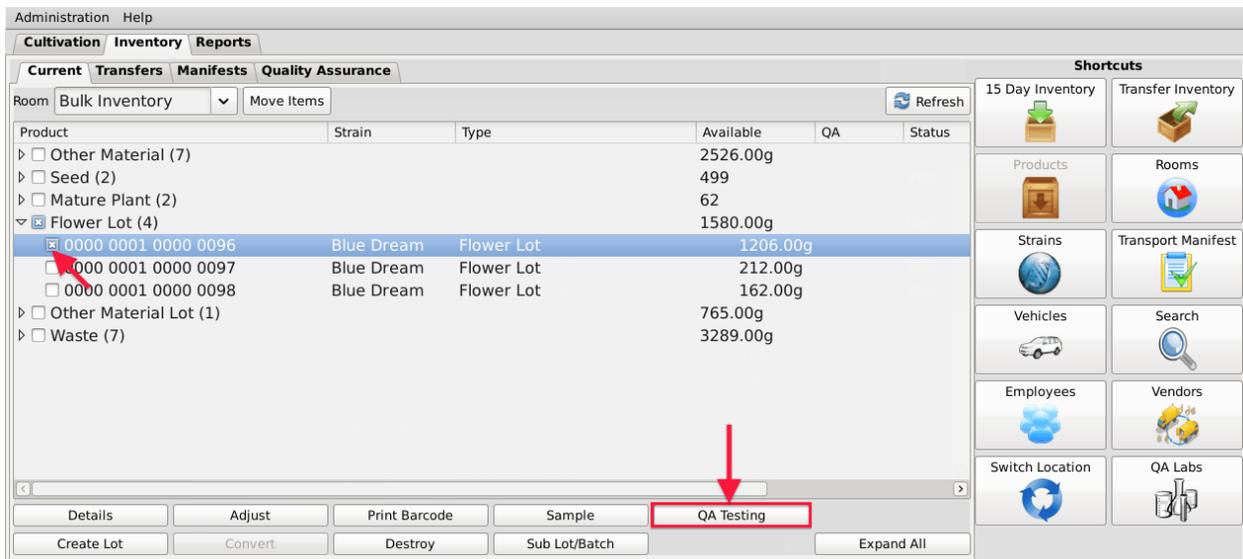
In this chapter, you will learn how to:

- ✓ Account for samples provided to independent testing labs for quality assurance
- ✓ Account for samples provided to independent testing labs for heavy metal and pesticide testing for medical product
- ✓ Retrieve quality assurance test results if submitted by the independent testing lab
- ✓ Manually input quality assurance test results if necessary

### QA Testing

This function will notify the Traceability System of inventory deductions resulting from samples provided to independent testing labs for the purpose of quality assurance testing. Though the example screen shots illustrate the accounting for flower lot testing samples, accounting for other material lot testing samples follows the same path.

- Navigate to the Inventory Room within which the to-be-tested inventory is located (make sure that you are within the Inventory tab and the Current sub-tab).
- Click on the checkbox to the left of the item to be tested.
- Click on the “QA Testing” button at the bottom of the screen.



- This will bring up the QA Sample screen.

QA Sample ✕

**Instructions**

Please select the lab you will be sending the QA sample to. Once selected, you will also need to enter the quantity of the product that is being sampled.

Product  Strain

Barcode  Type

Sample Quantity

Lot Use  ▼

QA Lab  ▼

**QA Tests Required**

The following tests will be required

- Moisture Content
- Potency Analysis
- Foreign Matter Inspection
- Microbiological Screening

- From the QA Sample screen,
  - Enter the Sample Quantity, and
  - Select the receiving QA Lab from the QA Lab drop down.

The screenshot shows the 'QA Sample' form with the following fields and values:

- Product: Blue Deram
- Strain: Blue Dream
- Barcode: 0000 0001 0000 0096
- Type: Flower Lot
- Sample Quantity: 6.00 g
- Lot Use: Usable Marijuana
- QA Lab: XYZ Labs (selected from a dropdown menu)

The 'QA Tests Required' section lists the following tests with checked boxes:

- Moisture Content
- Potency Analysis
- Foreign Matter Inspection
- Microbiological Screening

Buttons at the bottom: Cancel, OK

- Click on the “OK” button when complete.

This screenshot is identical to the previous one, but with the 'OK' button highlighted by a red box and a red arrow pointing to it.

Buttons at the bottom: Cancel, **OK**

- The Traceability System automatically deducts the sample quantity from inventory and the inventory item's status is updated to read "Pending QA".

Administration Help

**Cultivation Inventory Reports**

**Current Transfers Manifests Quality Assurance**

Room: Bulk Inventory Move Items Refresh

Product	Strain	Type	Available	QA	Status
Other Material (7)			2526.00g		
Seed (2)			499		
Mature Plant (2)			62		
Flower Lot (4)			1574.00g		
<input checked="" type="checkbox"/> 0000 0001 0000 0096	Blue Dream	Flower Lot		1200.00g	Pending QA
<input type="checkbox"/> 0000 0001 0000 0097	Blue Dream	Flower Lot		212.00g	
<input type="checkbox"/> 0000 0001 0000 0098	Blue Dream	Flower Lot		162.00g	
Other Material Lot (1)			765.00g		
Waste (7)			3289.00g		

Shortcuts: 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, QA Labs

Buttons: Details, Adjust, Print Barcode, Sample, QA Testing, Create Lot, Convert, Destroy, Sub Lot/Batch, Expand All

- You will also find a list of all outstanding submitted samples by navigating to the "Quality Assurance" tab within the "Inventory" tab.
- Note: You may need to click the "Refresh" button to update your view.

Administration Help

**Cultivation Inventory Reports**

**Current Transfers Manifests Quality Assurance**

Start: 02/12/2014 End: 02/12/2014 Refresh

QA Lab	Sample Time	Barcode ID	Strain	Product Type	Product Name	Status
XYZ Labs	02/12/2014 1:48 AM	0000 0001 0000 0096	Blue Dream	Flower Lot	Blue Deram	Pending QA

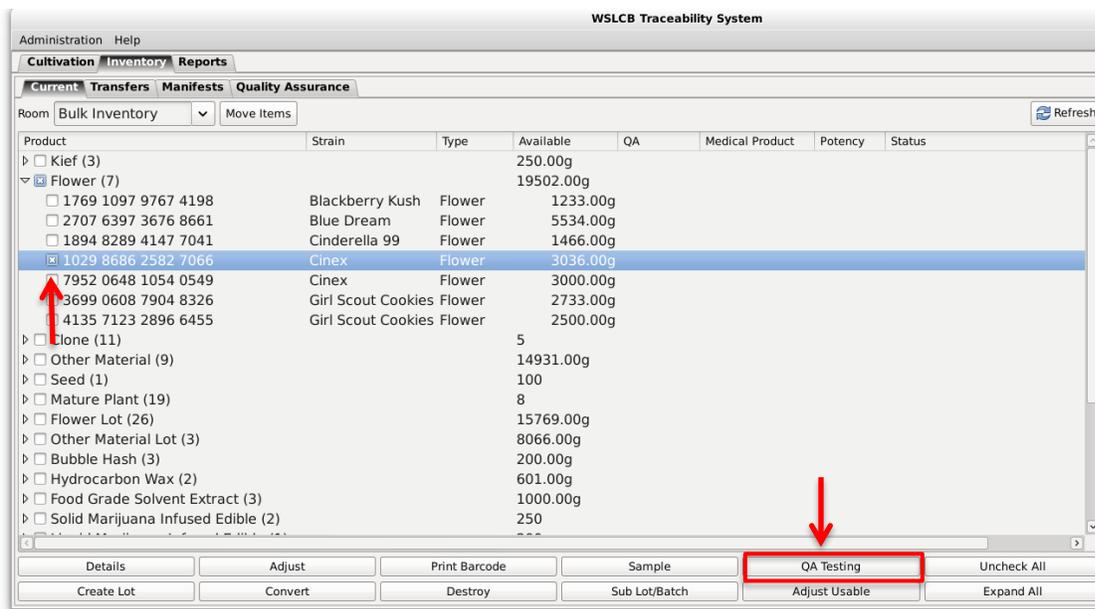
Shortcuts: 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, QA Labs

Buttons: View Results, Manually Add Results, Retrieve Results, Void Sample

## QA Testing – Heavy Metals/Pesticides

Flower that is to be designated as medical product must be tested for heavy metals and pesticides **before** lot creation. This function will notify the Traceability System of inventory deductions resulting from samples provided to independent testing labs for the purpose of heavy metal and pesticide testing.

- Navigate to the Inventory Room within which the to-be-tested inventory is located (make sure that you are within the Inventory tab and the Current sub-tab).
- Click on the check box to the left of the item to be tested.
- Click on the “QA Testing” button at the bottom of the screen.



- This will bring up the QA Sample screen.

**QA Test**

**Instructions**  
Please select the lab you will be sending the QA sample to. Once selected, you will also need to enter the quantity of the product that is being sampled.

Product:  Strain: Cinex  
 Barcode: 1029 8686 2582 7066 Type: Flower  
 Sample Quantity:   
 QA Lab:

**QA Tests Required**  
The following tests will be required  
 Pesticide Residue  
 Heavy Metal

- From the QA Sample screen,
  - Enter the Sample Quantity, and
  - Select the receiving QA Lab from the QA Lab drop down.

**QA Test**

**Instructions**  
Please select the lab you will be sending the QA sample to. Once selected, you will also need to enter the quantity of the product that is being sampled.

Product:  Strain: Cinex  
 Barcode: 1029 8686 2582 7066 Type: Flower  
 Sample Quantity: 4.00 g  
 QA Lab: BioTrackTHC Test Lab

**QA Tests Required**  
The following tests will be required  
 Pesticide Residue  
 Heavy Metal

**Note:** The minimum sample size is automatically determined based on the amount of flower being tested. If the following error appears the sample quantity must be adjusted to meet or exceed the minimum requirement.

**Error**

The minimum sample size is 9 grams, but you have only selected a sample size of 4.00 grams.

Click on the “OK” button when complete

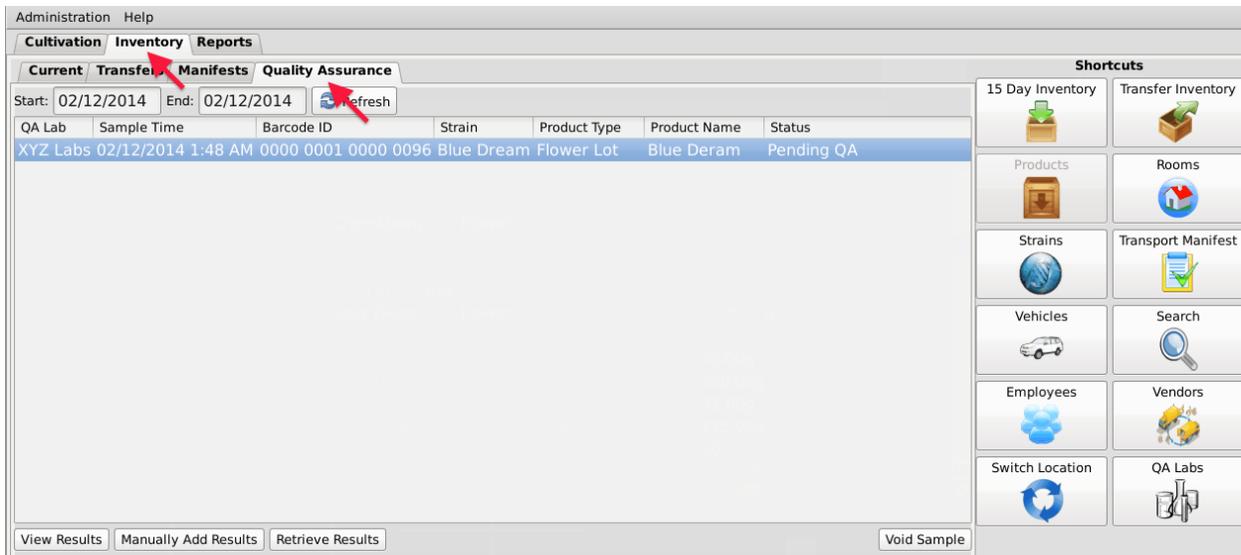
- The ‘Confirm’ screen displays. Click the ‘Proceed’ button.

- The Traceability System automatically deducts the sample quantity from inventory

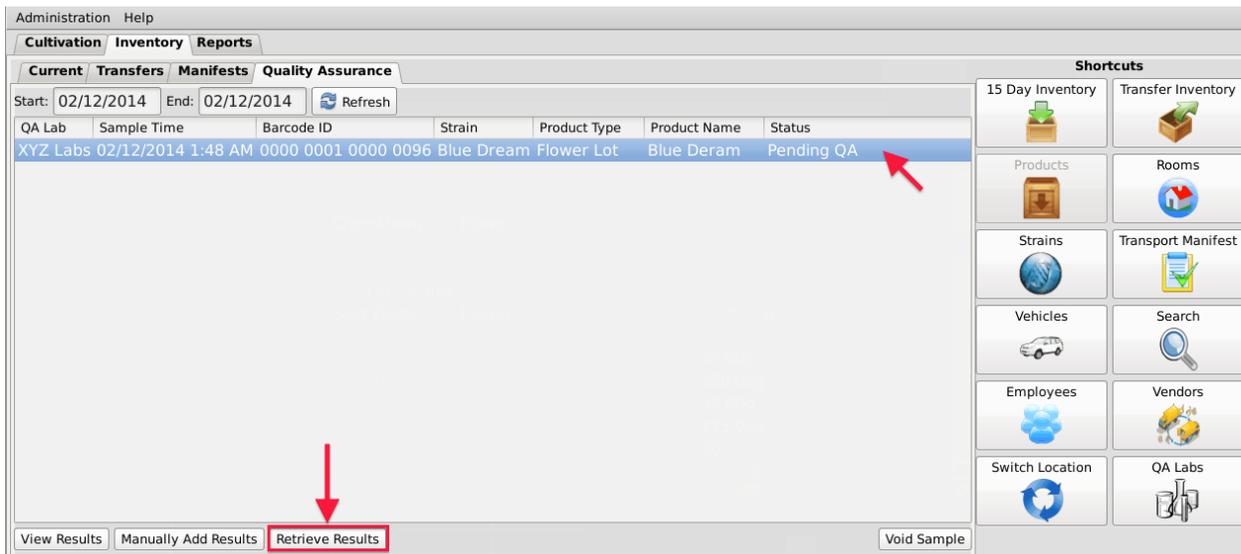
## Retrieve Results

If the independent testing lab submitted the quality assurance testing results directly to the Traceability System, you may retrieve those results.

- Navigate to the “Quality Assurance” tab within the “Inventory” tab.



- Samples for which results have not been entered into the Traceability System have a status of “Pending QA”.
- Select the sample for which you would like to retrieve testing results.
- Click on the “Retrieve Results” button at the bottom of the screen.



- Once the results have been retrieved, the “Status” of the sample will update to either “Passed QA” or “Failed QA”.

## View Results

Once the quality assurance test results for a sample have been entered into the Traceability System, you may view the results at any time by navigating to the Quality Assurance tab.

- Narrow the results by selecting a start-date and an end-date.

- Select the desired sample and then click on the “View Results” button.

Administration Help

Cultivation Inventory Reports

Current Transfers Manifests Quality Assurance

Start: 02/12/2014 End: 02/12/2014 Refresh

QA Lab	Sample Time	Barcode ID	Strain	Product Type	Product Name	Status
XYZ Labs	02/12/2014 1:48 AM	0000 0001 0000 0096	Blue Dream	Flower Lot	Blue Deram	Passed QA
XYZ Labs	02/12/2014 2:15 AM	0000 0001 0000 0098	Blue Dream	Flower Lot	Blue Deram	Passed QA

View Results Manually Add Results Retrieve Results Void Sample

Shortcuts: 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, QA Labs

## Void a Sample

You may void a quality assurance testing sample should it be necessary (e.g., sample is actually from a different Lot), but only if the sample’s status is “Pending QA”.

- Navigate to the Quality Assurance tab.
- Narrow the results by selecting a start-date and an end-date.
- Select the to-be-voided sample and then click on the “Void Sample” button.

Administration Help

Cultivation Inventory Reports

Current Transfers Manifests Quality Assurance

Start: 02/12/2014 End: 02/16/2014 Refresh

QA Lab	Sample Time	Barcode ID	Strain	Product Type	Product Name	Status
XYZ Labs	02/12/2014 1:48 AM	0000 0001 0000 0096	Blue Dream	Flower Lot	Blue Deram	Passed QA
XYZ Labs	02/12/2014 2:15 AM	0000 0001 0000 0098	Blue Dream	Flower Lot	Blue Deram	Passed QA
XYZ Labs	02/14/2014 1:51 PM	0000 0001 0000 0102	Blue Dream	Flower Lot	Blue Deram	Passed QA
XYZ Labs	02/16/2014 7:42 PM	0000 0001 0000 0104	Blue Dream	Flower Lot	Blue Deram	Pending QA

View Results Manually Add Results Retrieve Results Void Sample

Shortcuts: 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, QA Labs

## Chapter 14: Transportation Manifests

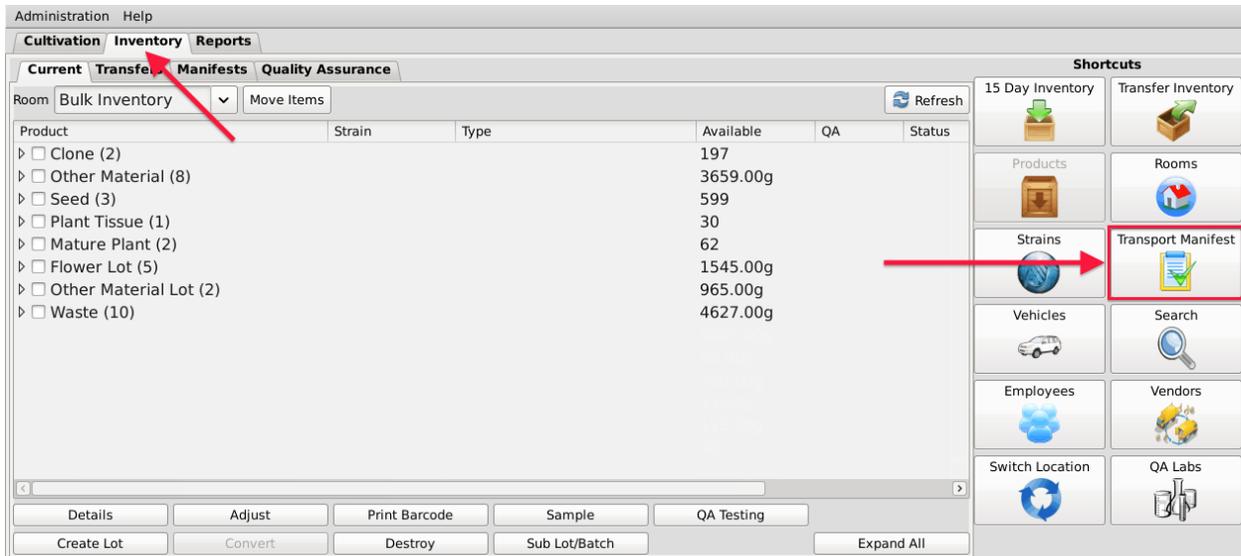
In this chapter, you will learn how to:

- ✓ Generate a Transportation Manifest
- ✓ Modify a Transportation Manifest

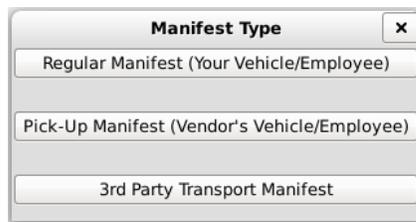
### Create a Transportation Manifest

To create the standardized Marijuana Transportation Manifest for outbound shipments, you will need to access the Transportation Manifest screen.

- Navigate to the “Inventory” tab found in the top-left corner of the screen, and then click on the “Transportation Manifest” button located on the right-hand side of the screen.



- Click on the appropriate Transport Manifest Type



Regular Manifest – Your employee and vehicle will be transporting the items

Pickup Manifest – Vendor’s employee and vehicle will be transporting the items

3rd Party -3<sup>rd</sup> Party will be transporting the items

- This will bring up the Transportation Manifest screen.

The screenshot shows the 'Transportation Manifest' window. On the left, there are 'Instructions' and a 'Select the departure' dropdown. The main area is titled 'Stop 1' and contains the following fields:

- Departure:** Training Producer, 02/17/2014, 5:29:15 PM
- Arrival:** (Empty dropdown), 02/17/2014, 5:59:15 PM
- Route:** (Empty text area)

Below these fields is a table with the following columns: Item, Strain, Type, Available. The table is currently empty.

At the bottom of the window, there are fields for 'Employee' and 'Vehicle', and a 'Close' button.

- Select the destination Licensee from the “Arrival” drop down. If the intended recipient is not found within the drop down, you will need to add the recipient to your Preferred Vendor List as described in Chapter 4: Vendors.

The screenshot shows the 'Transportation Manifest' window with the 'Arrival' dropdown menu open. The menu lists the following options:

- 1Patrick Producer
- Patrick Retail
- Patrick Second Retail
- Training Processor** (highlighted in blue)
- Training Retail
- 420Angell ProdProc (Producer + Processor)
- 420Angell Retail (Retailer)
- 420Byron ProdProc (Producer + Processor)
- 420Byron Retail (Retailer)
- 420Farley ProdProc (Producer + Processor)
- 420Farley Retail (Retailer)
- 420Smith Retail (Retailer)
- 420Steenhout Retail (Retailer)
- 420Vo Retail (Retailer)

Red arrows point to the dropdown arrow and the highlighted 'Training Processor' item.

- Once “Arrival” is selected, the system automatically completes a default driving “Route” and lists all of the available inventory items that can be included on the manifest.

**Transportation Manifest**

**Instructions**

To create a new manifest log chose the vendor you are transporting your inventory to from the Arrival drop down.  
If you do not see the Vendor you are transferring to, the Vendor must be added using the Vendors button found below the Transport Manifest button in the Inventory tab.  
Select the departure

**Stop 1**

Departure Training Producer 02 / 17 / 2014 5 : 33 : 59 PM

Arrival Training Processor 02 / 17 / 2014 6 : 03 : 59 PM

Route Head north. Turn right toward 4th Ave W. Turn right onto 4th Ave W. At the traffic circle, continue straight to stay on 4th Ave W. Turn right onto Franklin St SE

Item	Strain	Type	Available
<input type="checkbox"/> Flower Lot			
<input type="checkbox"/> 0000 0001 0000 0104 Blue Dream Flower Lot			500.00
<input type="checkbox"/> 0000 0001 0000 0097 Blue Dream Flower Lot			210.00
<input type="checkbox"/> 0000 0001 0000 0096 Blue Dream Flower Lot			680.00
<input type="checkbox"/> Other Material Lot			
<input type="checkbox"/> 0000 0001 0000 0103 Blue Dream Other Material Lot			200.00
<input type="checkbox"/> 0000 0001 0000 0079 Blue Dream Other Material Lot			765.00

Generate Employee  Vehicle

- If the receiving Licensee is a Producer, only Seeds, Clones, Mature Plants, and Plant Tissue will be available for selection.
- If the receiving Licensee is a Processor, only Flower Lots and Other Material Lots, and Wet Flower will be available for selection.
- Within the inventory section, select the item(s) to be included on this manifest.
- Select the Employee and Vehicle or Transport Company (3<sup>rd</sup> Party Manifest only) that will be transporting the inventory.
- Select the expected departure date/time and the expected arrival date/time.

Transportation Manifest ✕

**Instructions**

To create a new manifest log chose the vendor you are transporting your inventory to from the Arrival drop down.

If you do not see the Vendor you are transferring to, the Vendor must be added using the Vendors button found below the Transport Manifest button in the Inventory tab.

Select the departure

**Stop 1**

Departure Training Producer 02 / 17 / 2014 6 : 38 : 20 PM New Stop

Arrival Training Processor 02 / 17 / 2014 7 : 08 : 20 PM Clear

Route Head north. Turn right toward 4th Ave W. Turn right onto 4th Ave W. At the traffic circle, continue straight to stay on 4th Ave W. Turn right onto Franklin St SE

Item	Strain	Type	Available
<input checked="" type="checkbox"/> Flower Lot			
<input type="checkbox"/> 0000 0001 0000 0104	Blue Dream	Flower Lot	500.00
<input checked="" type="checkbox"/> 0000 0001 0000 0097	Blue Dream	Flower Lot	210.00
<input type="checkbox"/> 0000 0001 0000 0096	Blue Dream	Flower Lot	680.00
<input type="checkbox"/> Other Material Lot			
<input type="checkbox"/> 0000 0001 0000 0103	Blue Dream	Other Material Lot	200.00
<input type="checkbox"/> 0000 0001 0000 0079	Blue Dream	Other Material Lot	765.00

Employee Michael Anderson
 Vehicle Van 2

- Click “Generate” when all of the manifest components have been completed.

Transportation Manifest ✕

**Instructions**

To create a new manifest log chose the vendor you are transporting your inventory to from the Arrival drop down.

If you do not see the Vendor you are transferring to, the Vendor must be added using the Vendors button found below the Transport Manifest button in the Inventory tab.

Select the departure

**Stop 1**

Departure Training Producer 02 / 17 / 2014 6 : 38 : 20 PM New Stop

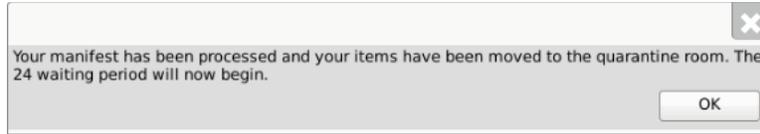
Arrival Training Processor 02 / 17 / 2014 7 : 08 : 20 PM Clear

Route Head north. Turn right toward 4th Ave W. Turn right onto 4th Ave W. At the traffic circle, continue straight to stay on 4th Ave W. Turn right onto Franklin St SE

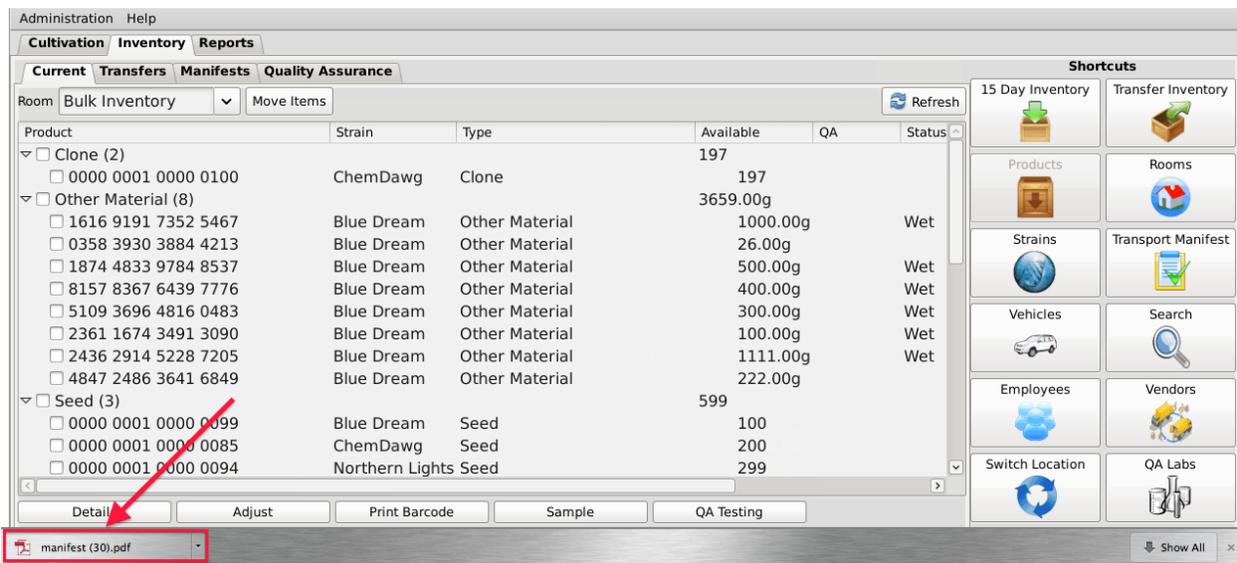
Item	Strain	Type	Available
<input checked="" type="checkbox"/> Flower Lot			
<input type="checkbox"/> 0000 0001 0000 0104	Blue Dream	Flower Lot	500.00
<input checked="" type="checkbox"/> 0000 0001 0000 0097	Blue Dream	Flower Lot	210.00
<input type="checkbox"/> 0000 0001 0000 0096	Blue Dream	Flower Lot	680.00
<input type="checkbox"/> Other Material Lot			
<input type="checkbox"/> 0000 0001 0000 0103	Blue Dream	Other Material Lot	200.00
<input type="checkbox"/> 0000 0001 0000 0079	Blue Dream	Other Material Lot	765.00

Employee Michael Anderson
 Vehicle Van 2

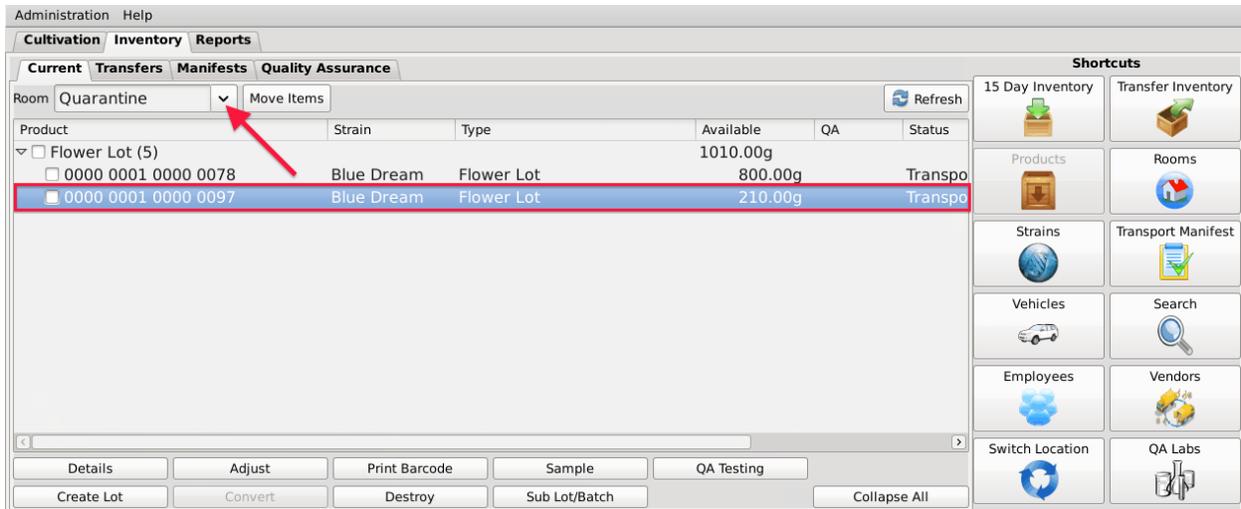
- The following notice confirms (1) the Traceability System’s receipt of the digital copy of the manifest, (2) the to-be-shipped items movement to the quarantine room within the Traceability System, and (3) the start of the 24-hour waiting period.



- Depending on your internet browser and your settings, your computer may automatically begin downloading a .pdf version of the manifest, or may prompt you to allow, keep, or accept the file.



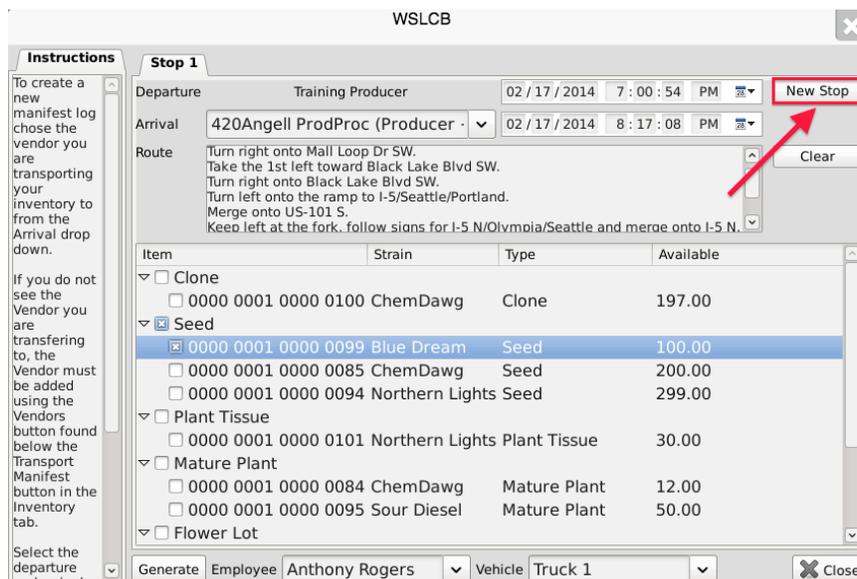
- The inventory will automatically be moved to the Quarantine room for the mandatory 24-hour waiting period.



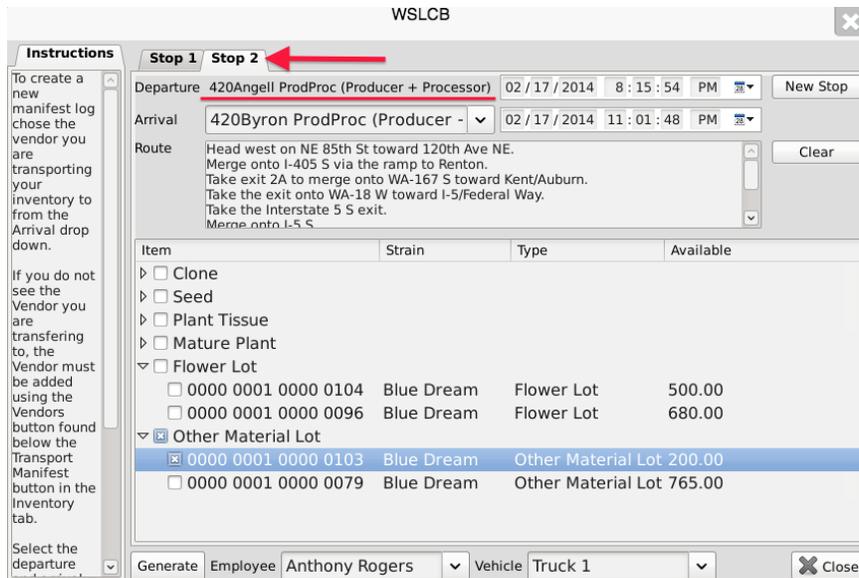
## Multi-Stop Transportation Manifests

Perform the following steps to create a transportation manifest with multiple delivery stops.

- After completing the first stop on the manifest, click on the “New Stop” button.



- A tab for a subsequent stop will appear with the Departure location pre-populated with the Arrival location of the previous stop (e.g., if Licensee 123 is the destination of the first delivery, then License 123 will be the starting point for the second delivery).

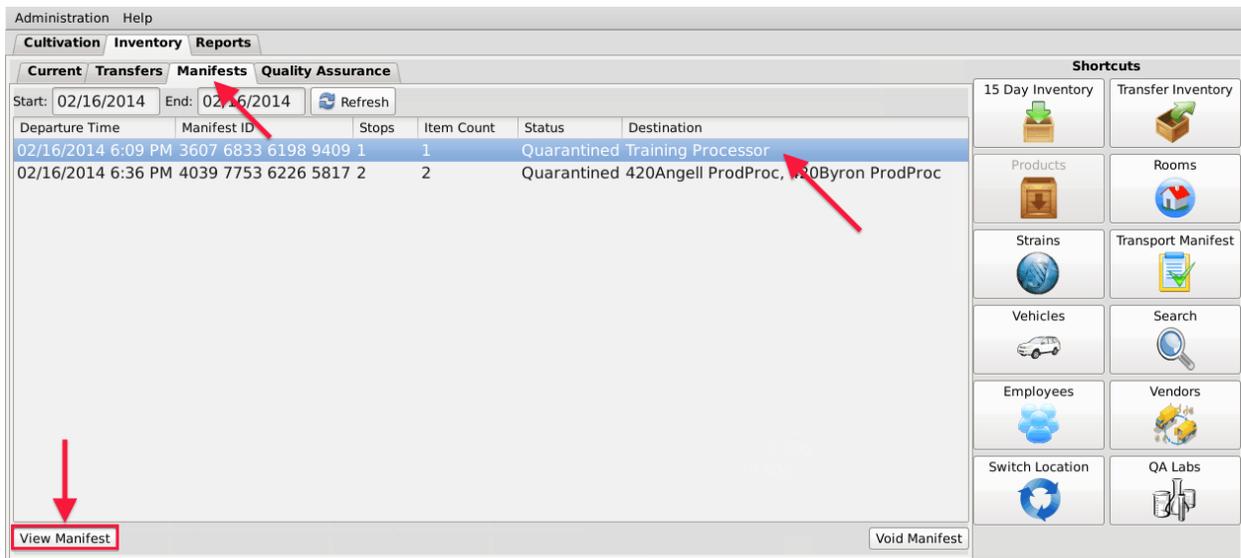


- Click on the “Generate” button when all stops have been created.

### View Manifests

Once a transportation manifest has been entered into the Traceability System, you may re-download it at any time by navigating to the Manifests tab.

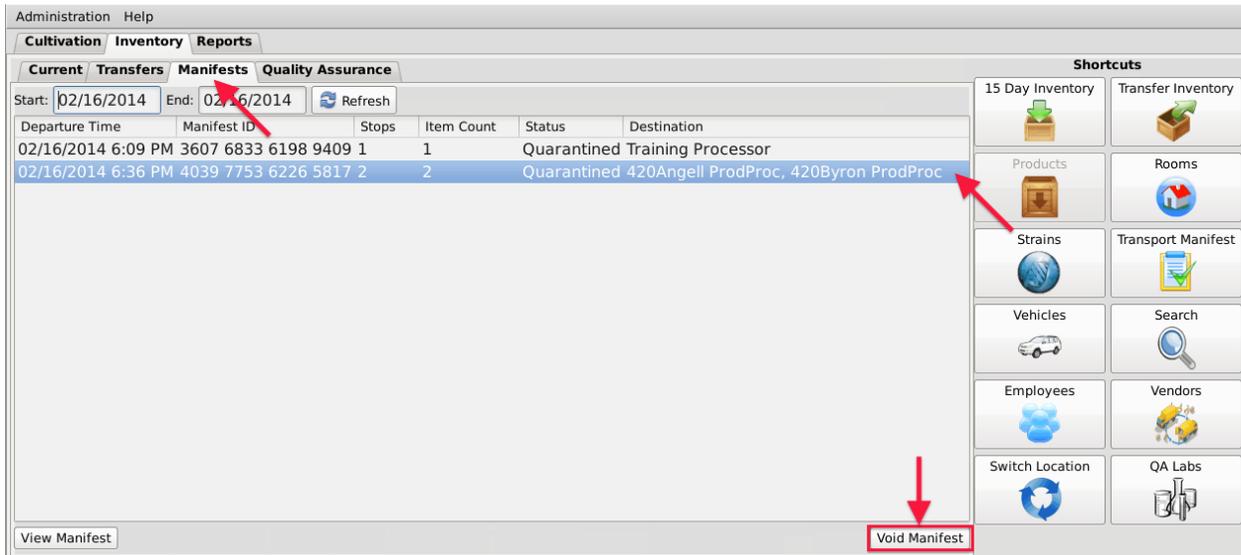
- Narrow the results by selecting a start-date and an end-date.
- Select the desired manifest and then click on the “View Manifest” button.



## Void a Manifest

You may void a transportation manifest should it be necessary (e.g., the sale is canceled or the manifest needs to be changed), but only if the manifest's status is still "Quarantined".

- Navigate to the Manifests tab.
- Narrow the results by selecting a start-date and an end-date.
- Select the to-be-voided manifest and then click on the "Void Manifest" button.



Administration Help

Cultivation Inventory Reports

Current Transfers Manifests Quality Assurance

Start: 02/16/2014 End: 02/16/2014 Refresh

Departure Time	Manifest ID	Stops	Item Count	Status	Destination
02/16/2014 6:09 PM	3607 6833 6198 9409	1	1	Quarantined	Training Processor
02/16/2014 6:36 PM	4039 7753 6226 5817	2	2	Quarantined	420Angell ProdProc, 420Byron ProdProc

View Manifest Void Manifest

Shortcuts: 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, QA Labs

## To void a partial manifest:

1. Click the Manifest tab and select the scheduled manifest you want to void.



Administration Help

Cultivation Inventory Reports

Current Transfers Manifests Quality Assurance

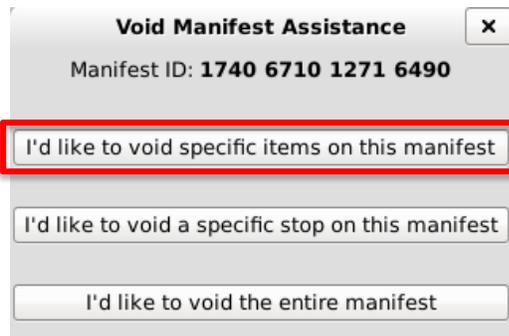
Start: 03/31/2016 End: 03/31/2016 Refresh

File Time	Departure Time	Manifest ID	Stops	Item Count	Status	Manifest Type	Destination
03/31/2016 2:13 PM	04/01/2016 2:42 PM	8535 4157 7860 6119	1	2	Shipped	Regular Manifest	Matt Processor
03/31/2016 2:26 PM	04/01/2016 2:56 PM	9518 1125 6304 1469	1	1	Quarantined	Regular Manifest	BioTrackTHC Lab 2
03/31/2016 2:33 PM	04/01/2016 3:02 PM	1834 7436 4817 0208	1	1	Shipped	Regular Manifest	Matt Processor

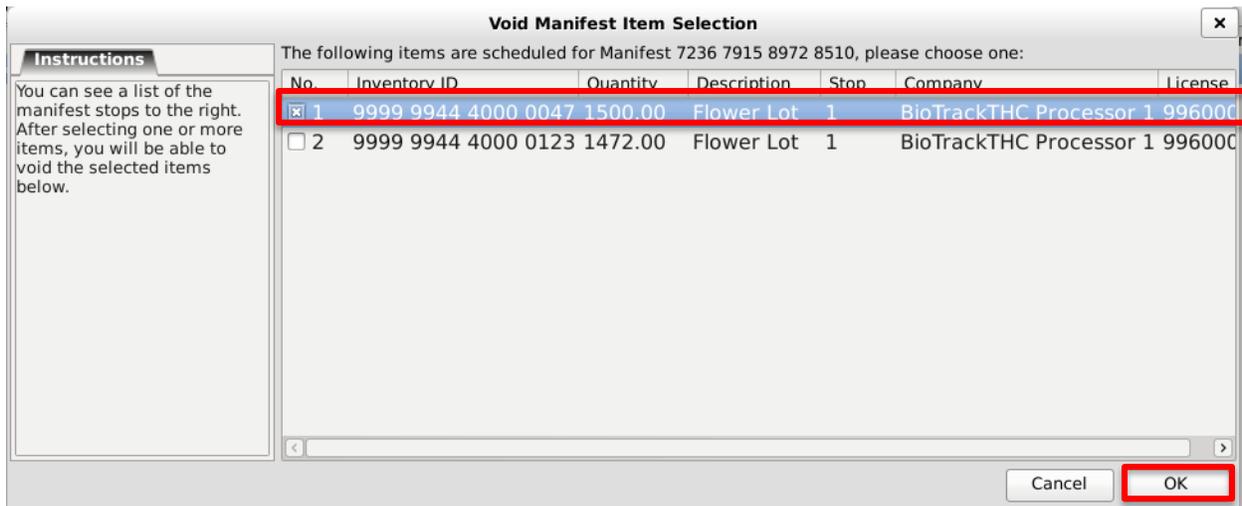
2. Click the 'Void Manifest' button.

	Vehicles 	Search 
	Employees 	Vendors 
	Switch Location 	QA Labs 
	Void Manifest 	

3. The 'Void Manifest Assistance' screen displays. Click the desired button. Here, we will click the 'I'd like to void specific items on this manifest' button.



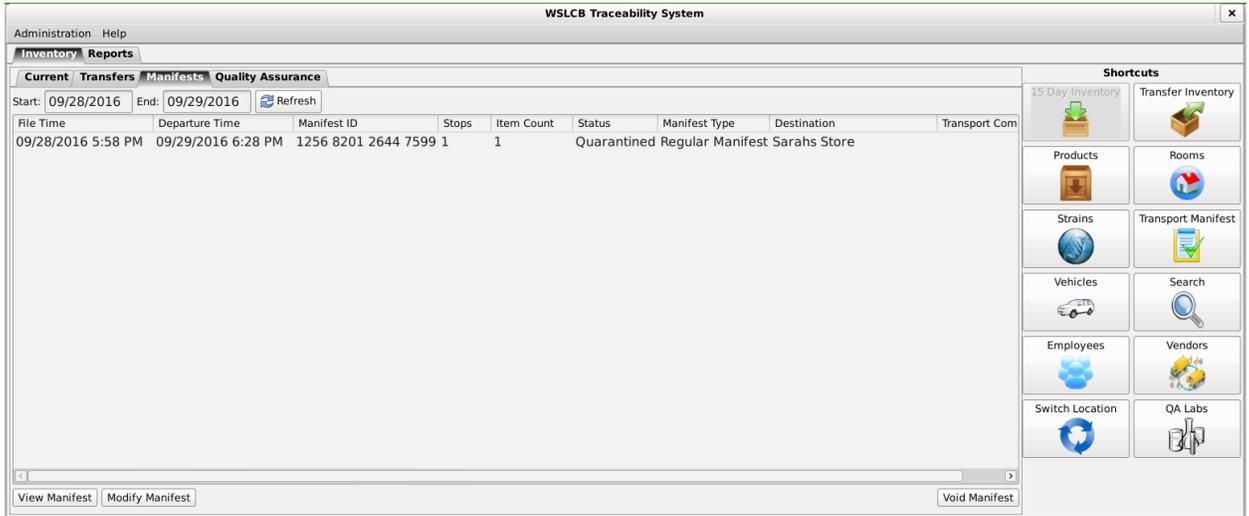
4. In the 'Void Manifest Item Selection' screen, select the item you want to void and click the OK button.



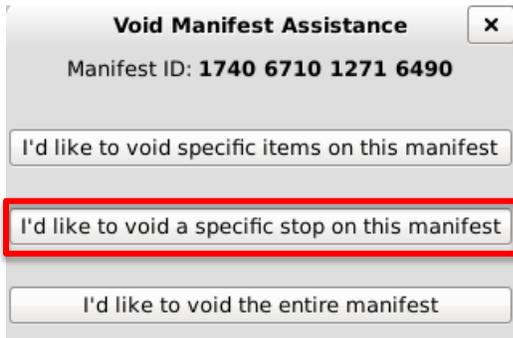
5. The 'OK' screen displays to confirm that the item has been voided. Click the 'OK' button.



6. The item has been voided and removed from the manifest.

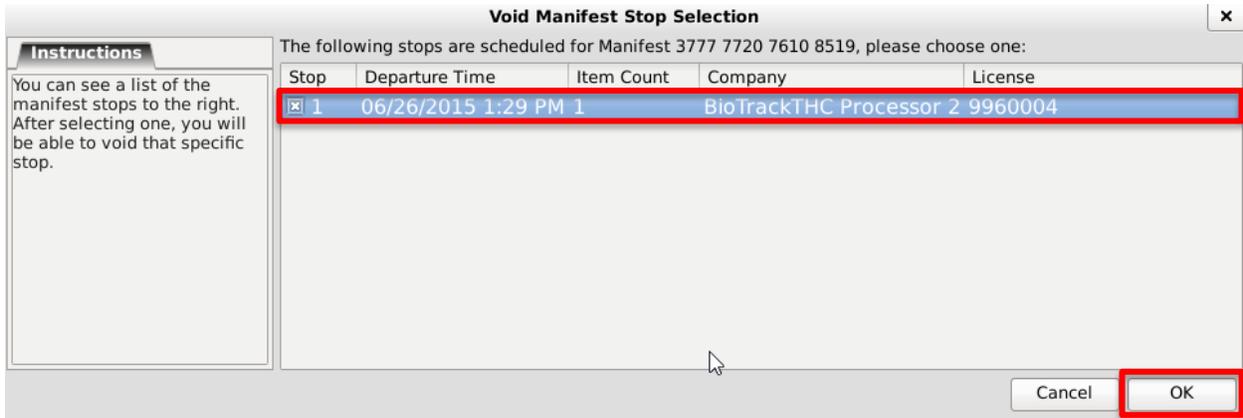


By clicking 'I'd like to void a specific stop on this manifest' on the 'Void Manifest Assistance' screen, the 'Void Manifest Stop Selection' screen displays.



1. Select the 'Manifest Stop' you want to void and click the 'OK' button.

**Note: click the check box under the Stop column to select the item.**



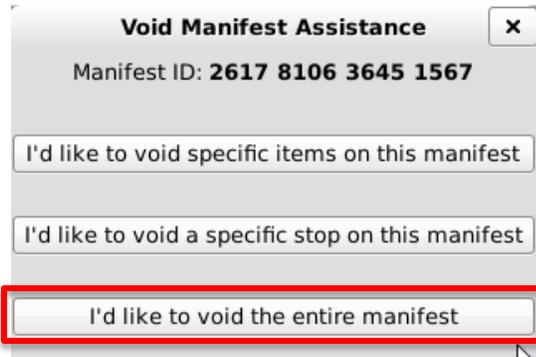
2. The 'OK' screen displays to confirm that the manifest\item has been voided. Click the 'OK' button.



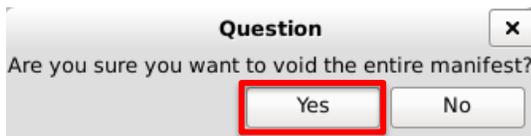
3. The Manifest Stop has been voided and removed.



By clicking 'I'd like to void the entire manifest' on the Void Manifest Assistance screen, the 'Question' screen displays.



1. Click the 'Yes' button to confirm that you want to void the entire manifest.



2. The 'OK' screen displays to confirm that the manifest has been voided. Click the OK button.



3. The Manifest has been voided and removed.

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WSLCB Traceability System

Administration   Help

Cultivation   Inventory   Reports

Current   Transfers   Manifests   Quality Assurance

Start: 06/23/2015   End: 07/03/2015   Refresh

File Time	Departure Time	Manifest ID	Stops	Item Count	Status	Manifest Type	Destination
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View Manifest   Modify Manifest   Void Manifest

**Shortcuts**

- 15 Day Inventory
- Transfer Inv
- Products
- Room
- Strains
- Transport M
- Vehicles
- Search
- Employees
- Vendor
- Switch Location
- QA Lat

## Chapter 15: Wholesale Inventory Transfers

In this chapter, you will learn how to:

- ✓ Complete an inbound inventory transfer
- ✓ Complete an outbound inventory transfer

### Initiating an Inventory Transfer

To receive inbound shipments and send outbound shipments in the Traceability System, you will need to

- Navigate to the “Inventory” tab found in the top-left corner of the screen, and then click on the “Transfer Inventory” button located on the right-hand side of the screen.

The screenshot shows the Traceability System interface. At the top, there are tabs for "Cultivation", "Inventory", and "Reports". The "Inventory" tab is selected. Below it, there are sub-tabs for "Current", "Transfer", "Manifests", and "Quality Assurance". The "Current" sub-tab is active, showing a table of inventory items. A red arrow points to the "Inventory" tab, and another red arrow points to the "Transfer Inventory" button in the "Shortcuts" panel on the right. The "Shortcuts" panel also includes buttons for "15 Day Inventory", "Products", "Rooms", "Strains", "Transport Manifest", "Vehicles", "Search", "Employees", "Vendors", "Switch Location", and "QA Labs".

Product	Strain	Type	Available	QA	Status
Clone (2)			197		
<input type="checkbox"/> 0000 0001 0000 0100	ChemDawg	Clone	197		
Other Material (8)			3659.00g		
<input type="checkbox"/> 1616 9191 7352 5467	Blue Dream	Other Material	1000.00g		Wet
<input type="checkbox"/> 0358 3930 3884 4213	Blue Dream	Other Material	26.00g		
<input type="checkbox"/> 1874 4833 9784 8537	Blue Dream	Other Material	500.00g		Wet
<input type="checkbox"/> 8157 8367 6439 7776	Blue Dream	Other Material	400.00g		Wet
<input type="checkbox"/> 5109 3696 4816 0483	Blue Dream	Other Material	300.00g		Wet
<input type="checkbox"/> 2361 1674 3491 3090	Blue Dream	Other Material	100.00g		Wet
<input type="checkbox"/> 2436 2914 5228 7205	Blue Dream	Other Material	1111.00g		Wet
<input type="checkbox"/> 4847 2486 3641 6849	Blue Dream	Other Material	222.00g		
Seed (3)			499		
<input type="checkbox"/> 0000 0001 0000 0085	ChemDawg	Seed	200		
<input type="checkbox"/> 0000 0001 0000 0094	Northern Lights	Seed	299		
Plant Tissue (1)			30		

- The following pop-up appears:

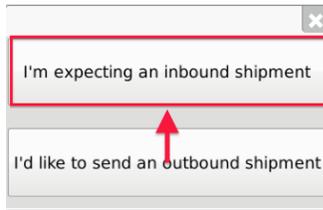
The pop-up dialog box has a close button (X) in the top right corner. It contains two radio button options:

- I'm expecting an inbound shipment
- I'd like to send an outbound shipment

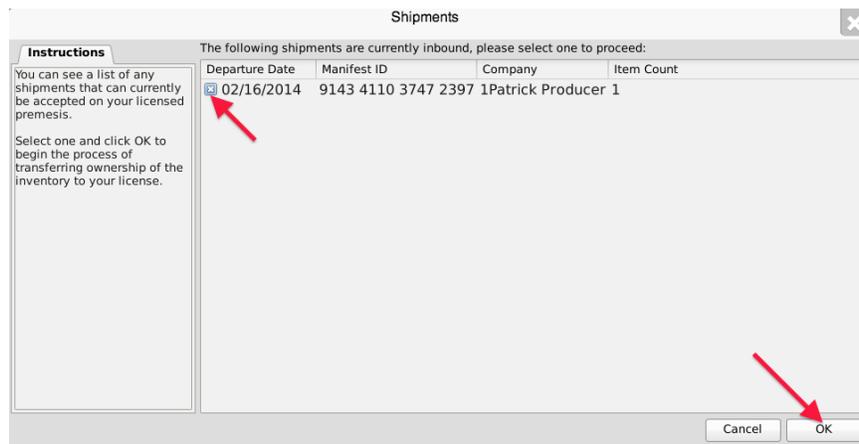
## Inbound Shipment

To receive an inbound shipment,

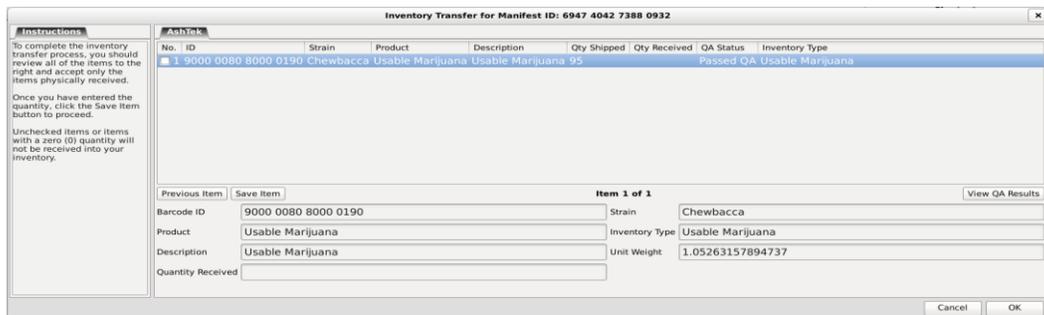
- Click on “I’m expecting an inbound shipment”



- A list of all currently filed but not-yet-received inbound manifests from vendors appears.
- Click on the check box to the left of the manifest being received.
- Click “OK”.



- The Inventory Transfer for Manifest ID screen, which lists the inventory associated with the manifest, appears. Note that though the example illustrates only one item, multiple items may be associated with the manifest and each item will have its own line.

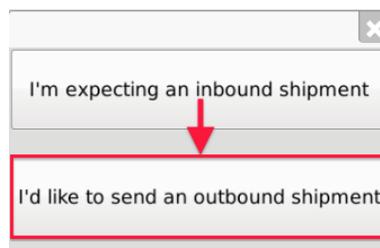


- Enter the Quantity Received and click ‘Save Item’ for each item that is on the manifest.
- Click the “OK” button after all quantities received are entered.
- The Traceability System automatically moves the inventory on the manifest into the Bulk Inventory room.

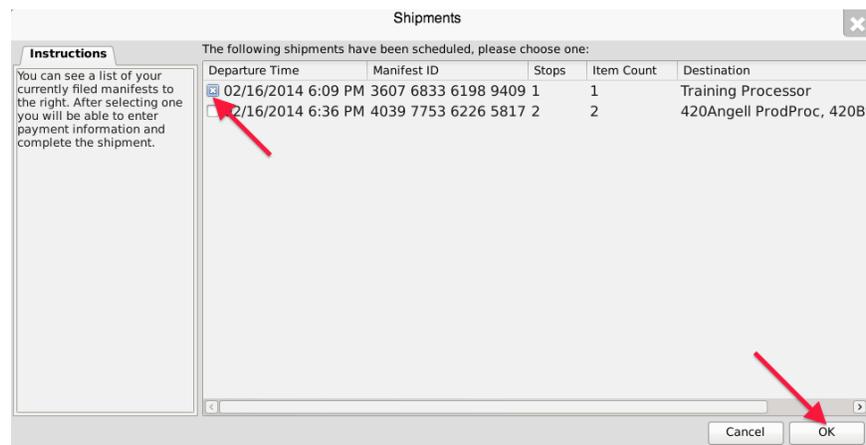
## Outbound Shipment

To send an outbound shipment,

- Click on “I’d like to send an outbound shipment”



- A list of all currently filed but yet to be Transferred outbound manifests to vendors appears.
- Click on the check box to the left of the manifest being shipped.
- Click “OK”.



- The Sales Price screen, which lists the inventory associated with the manifest, appears. Note that though the example illustrates only one item, multiple items may be associated with the manifest and each item will have its own line accordingly.

**Shipments**

Listed below are the transportation items. Please provide sale information:

**Instructions**  
To complete the inventory transfer process simply provide sale data to the right. Once you have filled out sale information for all stops, you may click OK to complete the inventory transfer process.

**Training Processor**  
Barcode ID: 0000 0001 0000 0097 (Blue Deram)  
Sale Price:   
Shipment Quantity: **210.00**  
Total Sale Price (Calculated Above) **0.00**

Cancel OK

- Enter the Sales Price of each item that is on the manifest.
- Click “OK” after all sales prices are entered (the total sales price is automatically computed within the grayed-out box).

**Shipments**

Listed below are the transportation items. Please provide sale information:

**Instructions**  
To complete the inventory transfer process simply provide sale data to the right. Once you have filled out sale information for all stops, you may click OK to complete the inventory transfer process.

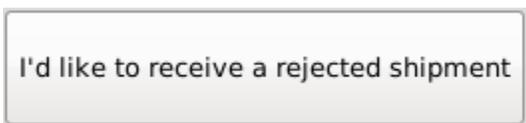
**Training Processor**  
Barcode ID: 0000 0001 0000 0097 (Blue Deram)  
Sale Price: **2315**  
Shipment Quantity: **210.00**  
Total Sale Price (Calculated Above) **2315.00**

Cancel **OK**

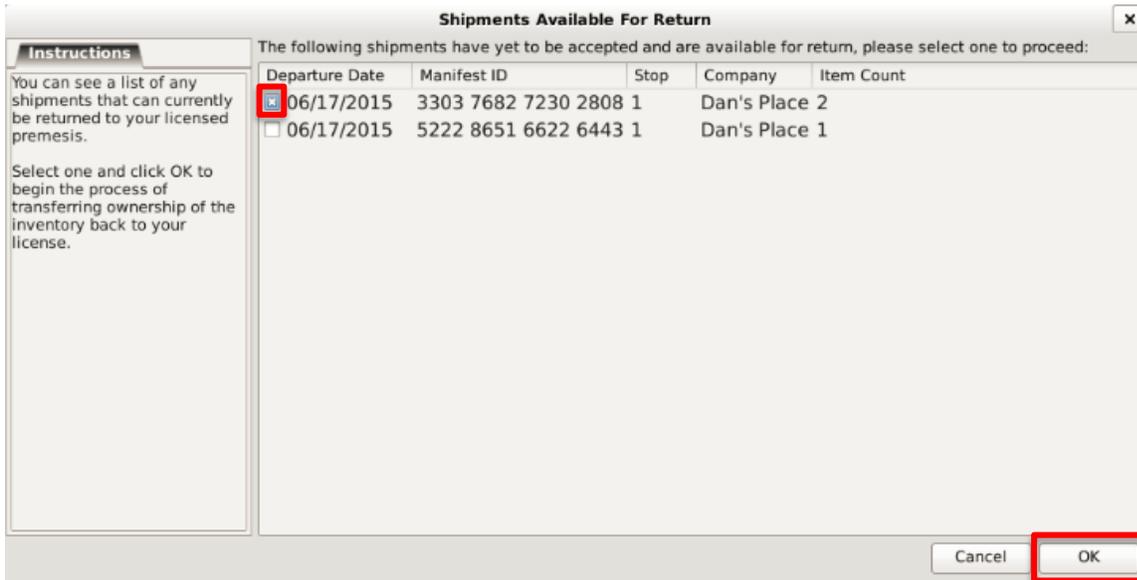
- The Traceability System automatically moves the inventory on the manifest out of the Quarantine room.

**To receive a rejected shipment:**

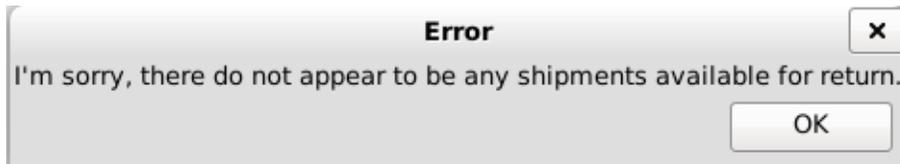
Click to retrieve inventory from a shipment that has been partially accepted or rejected.



1. Check the box of the rejected shipment you want to view. Click the 'OK' button.

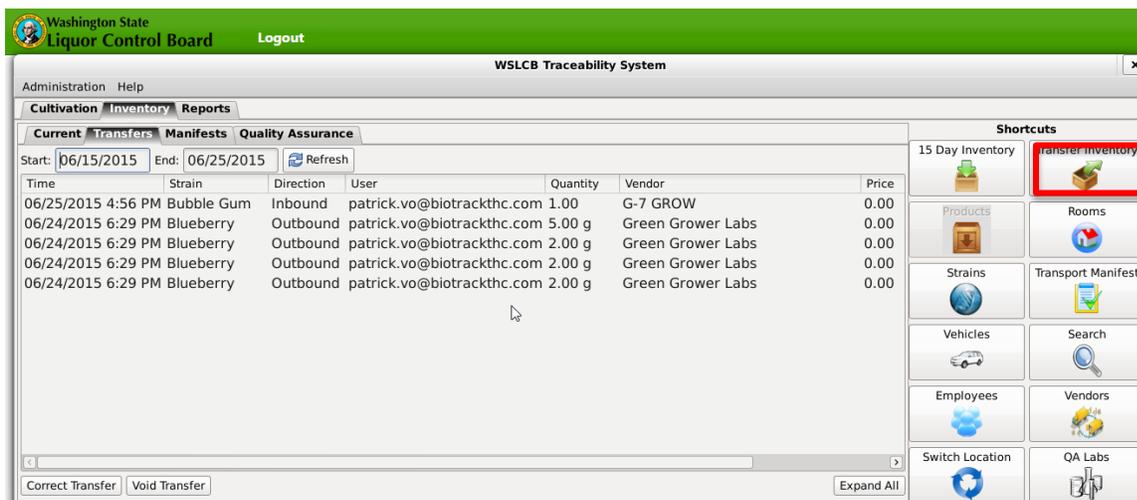


**Note: If there are no rejected shipments available, the 'Error' screen will appear.**

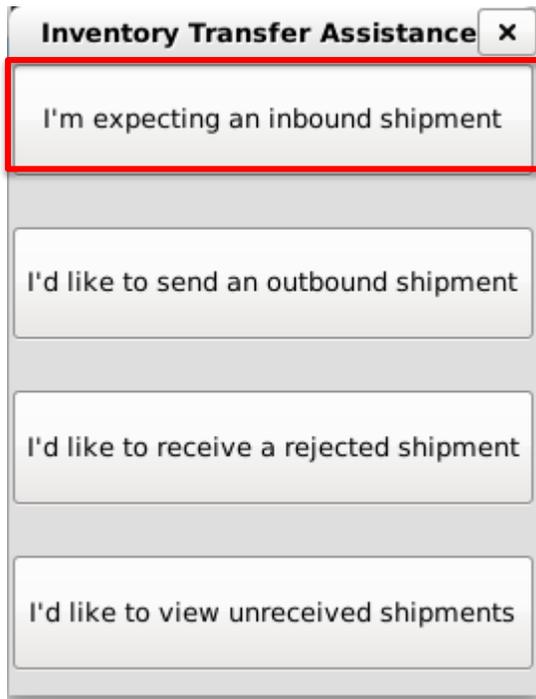


**To partially accept or reject items:**

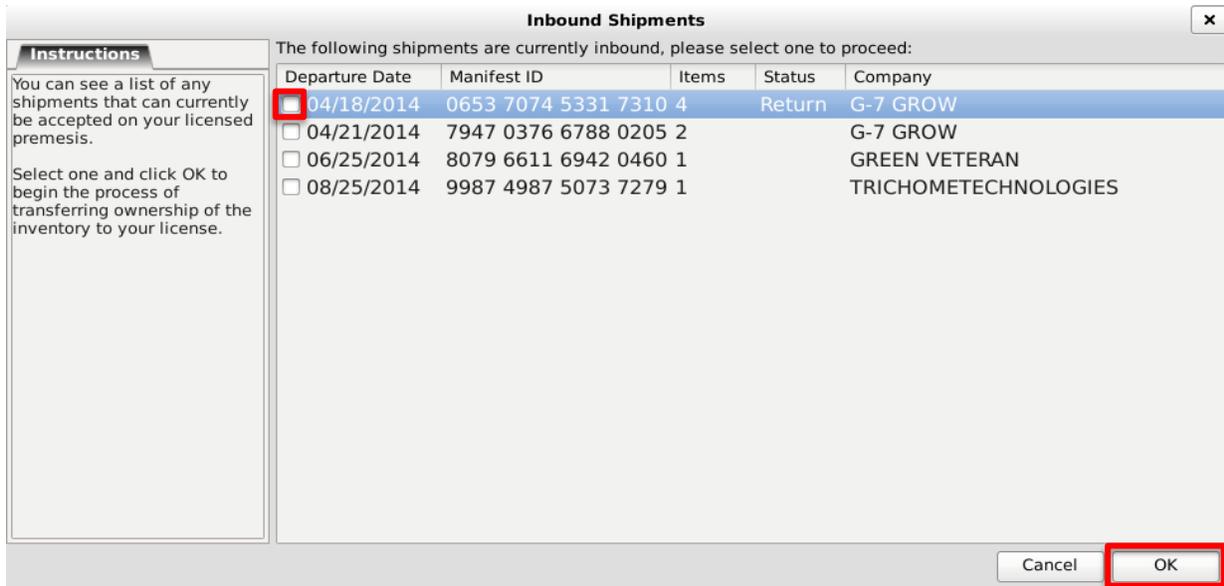
1. From the 'Inventory Transfer' screen, click 'Transfer Inventory'.



2. Click 'I'm expecting an inbound shipment'.



3. Select the shipment you want to partially accept or reject. Check the appropriate box in the Departure Date column. Click the 'OK' button.



4. The 'Inventory Transfer for Manifest ID' screen displays.

Washington State  
Liquor Control Board Logout

Inventory Transfer for Manifest ID: 0653 7074 5331 7310

**Instructions**

To complete the inventory transfer process, you should review all of the items to the right and accept only the items physically received.

Once you have entered the quantity, click the Save Item button to proceed.

Unchecked items or items with a zero (0) quantity will not be received into your inventory.

**G-7 GROW**

No.	ID	Strain	Product	Description	Qty Shipped	Qty Received	QA Status	Inventory Type
<input checked="" type="checkbox"/>	1 1895 0087 5048 4786	Bubble Gum	Mature Plant	Mature Plant 1			Never Tested	Mature Plant
<input type="checkbox"/>	2 3286 2674 3218 9644	Bubble Gum	Mature Plant	Mature Plant 1			Never Tested	Mature Plant
<input type="checkbox"/>	3 2571 6107 5521 2848	Bubble Gum	Mature Plant	Mature Plant 1			Never Tested	Mature Plant
<input type="checkbox"/>	4 3576 3570 5138 4358	Bubble Gum	Mature Plant	Mature Plant 1			Never Tested	Mature Plant

Previous Item Save Item **Item 1 of 4** View QA Results

Barcode ID: 1895 0087 5048 4786 Strain: Bubble Gum

Product: Mature Plant Inventory Type: Mature Plant

Description: Mature Plant

Quantity Received:

Cancel OK

5. Select the item you would like to receive and enter the quantity received.

Washington State  
Liquor Control Board Logout

Inventory Transfer for Manifest ID: 0653 7074 5331 7310

**Instructions**

To complete the inventory transfer process, you should review all of the items to the right and accept only the items physically received.

Once you have entered the quantity, click the Save Item button to proceed.

Unchecked items or items with a zero (0) quantity will not be received into your inventory.

**G-7 GROW**

No.	ID	Strain	Product	Description	Qty Shipped	Qty Received	QA Status	Inventory Type
<input checked="" type="checkbox"/>	1 1895 0087 5048 4786	Bubble Gum	Mature Plant	Mature Plant 1		1	Never Tested	Mature Plant
<input type="checkbox"/>	2 3286 2674 3218 9644	Bubble Gum	Mature Plant	Mature Plant 1			Never Tested	Mature Plant
<input type="checkbox"/>	3 2571 6107 5521 2848	Bubble Gum	Mature Plant	Mature Plant 1			Never Tested	Mature Plant
<input type="checkbox"/>	4 3576 3570 5138 4358	Bubble Gum	Mature Plant	Mature Plant 1			Never Tested	Mature Plant

Previous Item Save Item **Item 1 of 4** View QA Results

Barcode ID: 1895 0087 5048 4786 Strain: Bubble Gum

Product: Mature Plant Inventory Type: Mature Plant

Description: Mature Plant

Quantity Received:

Cancel OK

6. Click the 'Save Item' button.

Previous Item **Save Item** **Item 1 of 4**

Barcode ID 1895 0087 5048 4786 Strain

Product Mature Plant Inventory Type

Description Mature Plant

Quantity Received 1

**Note: Repeat the process until all items have been received. Items that are not processed will automatically be rejected.**

7. Click the 'OK' button on the bottom right corner of the screen.

Mature Plant

Cancel OK

8. The 'Inventory Transfer Receipt Confirmation' screen displays. Here, you can view items that will be fully accepted, partially accepted and rejected. Review and confirm receipt of inventory.

**Inventory Transfer Receipt Confirmation** [X]

Please confirm that: 1 item(s) will be fully accepted, 1 item(s) will be partially accepted, 1 item(s) will be rejected.

1 out of 3 item(s) will be fully accepted:

ID #	Inventory Type	Status	Received	Shipped
1230 0012 7000 0212	Usable Marijuana	Full Acceptance	150.00	150.00

1 out of 3 item(s) will be partially accepted:

ID #	Inventory Type	Status	Received	Shipped	Qty Not Accepted
1230 0012 7000 0211	Usable Marijuana	Partial Acceptance	175.00	200.00	25.00

1 out of 3 item(s) will be rejected:

ID #	Inventory Type	Status	Received	Shipped	Qty Not Accepted
1230 0012 7000 0210	Usable Marijuana	Not Accepted	0.00	250.00	250.00

Cancel OK

9. Click the 'OK' button to continue. Click the 'Cancel' button to go back and make changes.

**Note: Items that are rejected will be available in the inventory transfer screen until the licensee who shipped the inventory receives the rejected items back into their inventory.**

**Inbound Shipments**

**Instructions**

You can see a list of any shipments that can currently be accepted on your licensed premises.

Select one and click OK to begin the process of transferring ownership of the inventory to your license.

The following shipments are currently inbound, please select one to proceed:

Departure Date	Manifest ID	Items	Status	Company
<input type="checkbox"/> 04/27/2015	4243 4674 2926 1598 4		Return	LCB Davison Processor
<input type="checkbox"/> 05/27/2015	0583 4740 6004 6790 2		Return	LCB Davison Processor
<input type="checkbox"/> 05/27/2015	6225 3824 8308 5829 2			LCB Davison Processor
<input type="checkbox"/> 05/27/2015	4269 1646 7821 4476 1		Return	LCB Davison Processor
<input type="checkbox"/> 05/27/2015	0533 4171 8457 4340 2			LCB Davison Processor
<input type="checkbox"/> 06/18/2015	3412 8442 2368 1180 1			LCB Davison Processor
<input checked="" type="checkbox"/> 06/18/2015	0144 4986 1666 1322 1		Return	LCB Davison Processor

Cancel OK

**Note: The user can add a new price for partially accepted items. In the 'Inventory Transfer' screen, the system generates a suggested price based on the unit price.**

**Inventory Transfer**

**LCB Davison Retailer**

No.	ID	Strain	Description	Qty Shipped	Qty Accepted	Original Price	New Price	Inventory Type
<input checked="" type="checkbox"/>	1 1230 0012 7000 0211	Awsome Bud	Usable Marijuana	200.00	175.00	1000.00	875.00	Usable Marijuana
<input type="checkbox"/>	2 1230 0012 7000 0210	Jodi's Stuff	Usable Marijuana	250.00	0.00	1250.00	0.00	Usable Marijuana

Previous Item Save Item Item 1 of 2

Barcode ID: 1230 0012 7000 0211 Strain: Awsome Bud

Description: Usable Marijuana Inventory Type: Usable Marijuana

Usable: 1.00 Qty Shipped: 200.00

Qty Accepted: 175.00 Original Price: 1000.00

Qty Returned: 25.00 New Price: 875.00

\* Suggested new price is 875.00

\* This item was partially accepted. Upon return, a new sub-lot will be generated.

Cancel OK

**Note: Rejected items retain the original Inventory ID number. Partially received items will automatically receive a new Inventory ID number. These items will need to be relabeled with the new Inventory ID number immediately.**

**Partial Returns** x

**Instructions**

Listed to the right are any partial return shipments.

If you choose not to re-print the appropriate labels now, you may do so at a later time from the Current Inventory screen.

The following returned products have received new ID numbers and must be re-labeled with the new ID number:

New ID	Previous ID	Product	Strain	Inventory Type
<input type="checkbox"/> 1230 0012 7000 0213	1230 0012 7000 0211		Awesome Bud	

Print Barcode
OK

**To view unreceived shipments:**

Click to view shipments you have transferred out, but have not been processed by the recipient.

I'd like to view unreceived shipments

1. Click the unreceived shipment that you want to view. Click the 'OK' button to close the screen.

**Note: Unreceived shipments are considered outstanding invoices.**

The following shipments have yet to be accepted, but have not been rejected yet either:

Departure Date	Manifest ID	Stop	Company	Item Count
06/04/2015	9689 3917 6192 3195 1	1	BioTrackTHC ProducerProcessor 1	1
06/04/2015	9999 9999 6000 1363 1	1	HYDRO LIGHT	7
06/24/2015	9999 9999 6000 1364 1			4

OK

### To accept product back when vendor has accepted and returned

1. From the 'Inventory Transfer' screen, click 'Transfer Inventory'.

Washington State Liquor Control Board Logout

WSLCB Traceability System

Administration Help

Cultivation Inventory Reports

Current Transfers Manifests Quality Assurance

Start: 06/15/2015 End: 06/25/2015 Refresh

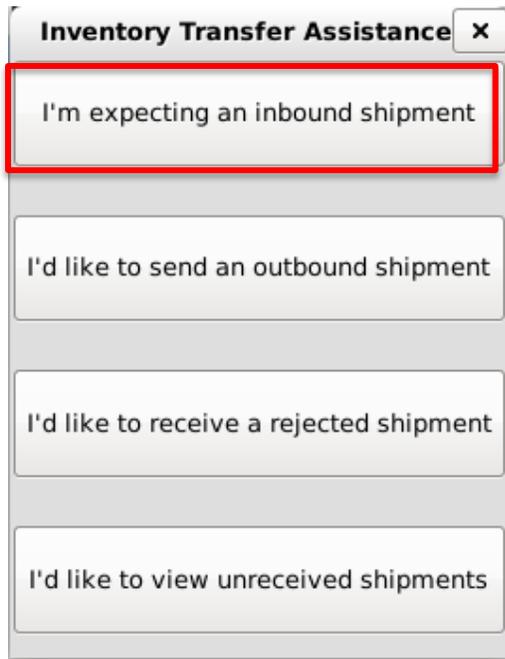
Time	Strain	Direction	User	Quantity	Vendor	Price
06/25/2015 4:56 PM	Bubble Gum	Inbound	patrick.vo@biotrackthc.com	1.00	G-7 GROW	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	5.00 g	Green Grower Labs	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	2.00 g	Green Grower Labs	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	2.00 g	Green Grower Labs	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	2.00 g	Green Grower Labs	0.00

Correct Transfer Void Transfer Expand All

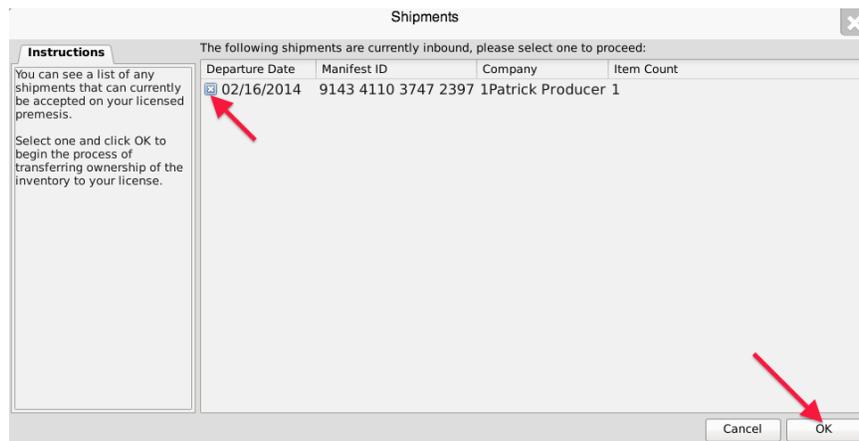
Shortcuts

- 15 Day Inventory
- Transfer Inventory
- Products
- Rooms
- Strains
- Transport Manifest
- Vehicles
- Search
- Employees
- Vendors
- Switch Location
- QA Labs

2. Click 'I'm expecting an inbound shipment'.



- A list of all currently filed inbound manifests from vendors appears.
- Click on the check box to the left of the manifest being received.
- Click "OK".



- The Inventory Transfer for Manifest ID screen, which lists the inventory associated with the manifest, appears. Note that though the example illustrates only one item, multiple items may be associated with the manifest and each item will have its own Line.

**WSLCB Traceability System**

**Inventory Transfer for Manifest ID: 6888 8217 5869 8512**

**Instructions**

To complete the inventory transfer process, you should review all of the items to the right and accept only the items physically received.

Once you have entered the quantity, click the Save Item button to proceed.

Unchecked items or items with a zero (0) quantity will not be received into your inventory.

**Grow**

No.	ID	Strain	Product	Description	Qty Shipped	Qty Received	Refund	QA Status	Inventory Type
1	9999 9944 4000 0203	Cinex	Flower Lot	Flower Lot	2267.00			Never Tested	Flower Lot

Previous Item
Save Item
Item 1 of 1
View QA Results

Barcode ID:

Product:

Description:

Quantity Received:

Total Refund:

Strain:

Inventory Type:

Refund Amount:

- Enter the Quantity Received, refund amount, and click ‘Save Item’ for each item that is on the manifest. The total refund will automatically update as refund amounts are saved.
- Click the “OK” button after all quantities received are entered.
- The Traceability System automatically moves the inventory on the manifest into the Bulk Inventory room.

**To bring product back before it has been accepted or rejected by the intended recipient**

1. From the ‘Inventory Transfer’ screen, click ‘Transfer Inventory’.

Washington State  
Liquor Control Board      Logout

WSLCB Traceability System

Administration    Help

Cultivation    Inventory    Reports

Current    Transfers    Manifests    Quality Assurance

Start: 06/15/2015    End: 06/25/2015    Refresh

Time	Strain	Direction	User	Quantity	Vendor	Price
06/25/2015 4:56 PM	Bubble Gum	Inbound	patrick.vo@biotrackthc.com	1.00	G-7 GROW	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	5.00 g	Green Grower Labs	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	2.00 g	Green Grower Labs	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	2.00 g	Green Grower Labs	0.00
06/24/2015 6:29 PM	Blueberry	Outbound	patrick.vo@biotrackthc.com	2.00 g	Green Grower Labs	0.00

Shortcuts

- 15 Day Inventory
- Transfer Inventory**
- Products
- Rooms
- Strains
- Transport Manifest
- Vehicles
- Search
- Employees
- Vendors
- Switch Location
- QA Labs

Correct Transfer    Void Transfer    Expand All

2. Click 'I'd like to receive a rejected shipment'

**Inventory Transfer Assistance** X

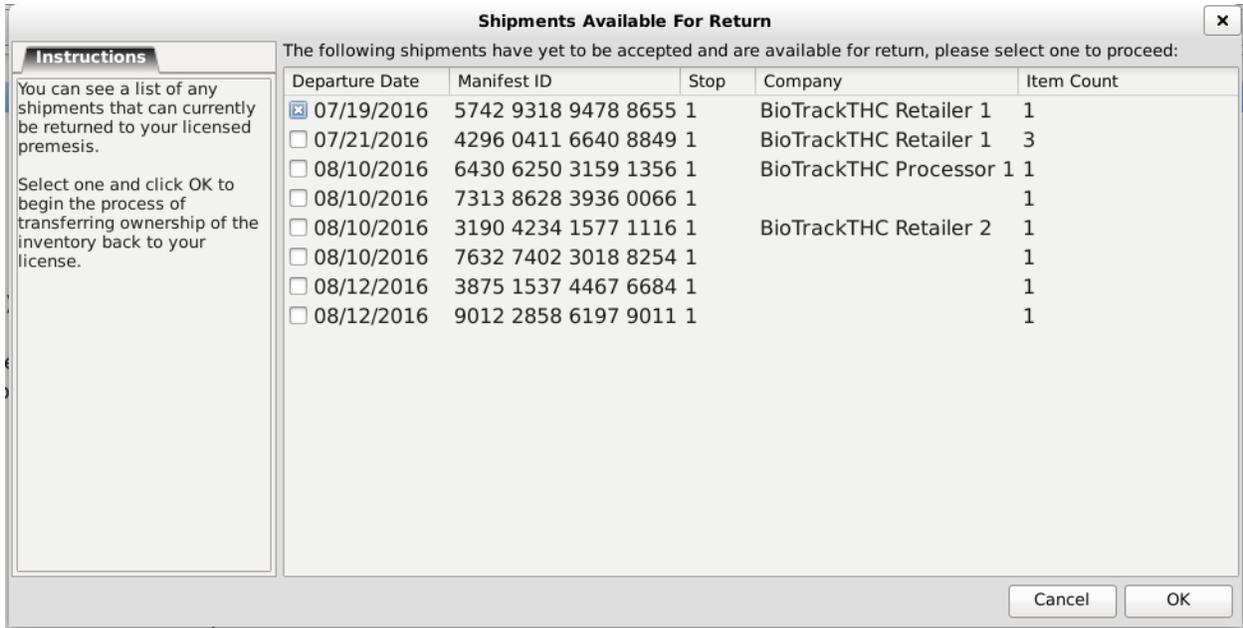
I'm expecting an inbound shipment

I'd like to send an outbound shipment

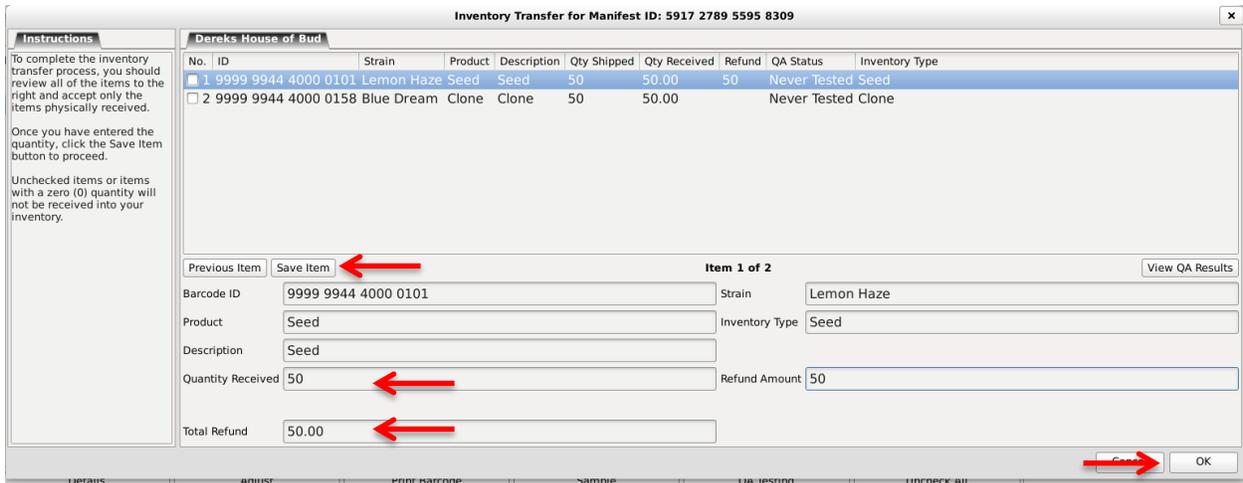
**I'd like to receive a rejected shipment**

I'd like to view unreceived shipments

- A list of all currently filed unaccepted outbound manifests appears.
- Click on the check box to the left of the manifest being returned.
- Click "OK".



- The Inventory Transfer screen, which lists the inventory associated with the manifest, appears. Note that though the example illustrates only one item, multiple items may be associated with the manifest and each item will have its own Line.



- Click 'Save Item' for each item that is on the manifest.
- Click the "OK" button after all quantities received are entered.

## Chapter 16: Waste and Destruction Events

- ✓ Collect general plant waste not attributable to the harvest/cure process
- ✓ Schedule plants for destruction
- ✓ Undo scheduled plant destruction
- ✓ Destroy plant(s)
- ✓ Schedule inventory for destruction
- ✓ Undo Destruction Notification
- ✓ Destroy inventory

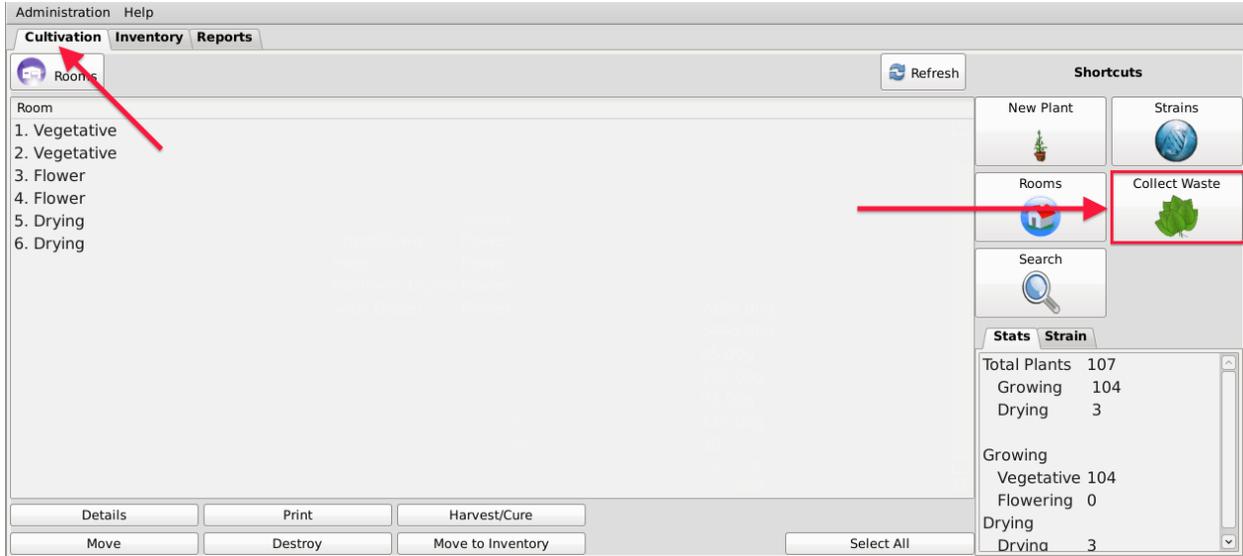
### Collecting General Plant Waste

The Traceability System accounts for two types of marijuana waste: (1) waste specifically attributable to the harvest, cure, or conversion process; and (2) general waste not associated with the harvest, cure, or conversion process.

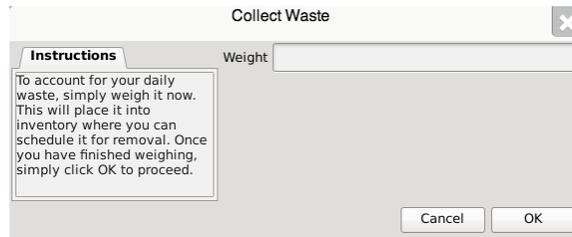
The specifically attributable waste collection is covered in each of their respective sections. This section details how to account for general waste not associated with the harvest, cure, or conversion process. An example of general waste would be a daily walk through of plant rooms and collecting dead leaves and vegetation trim.

To record collection of general waste:

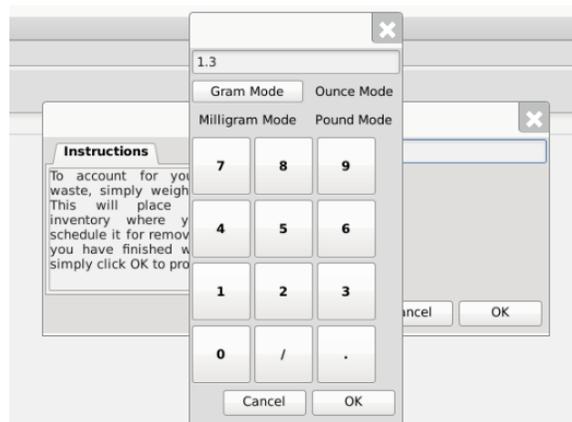
- Navigate to the “Cultivation” tab, and then click on the “Collect Waste” button located on the right-hand side of the home screen.



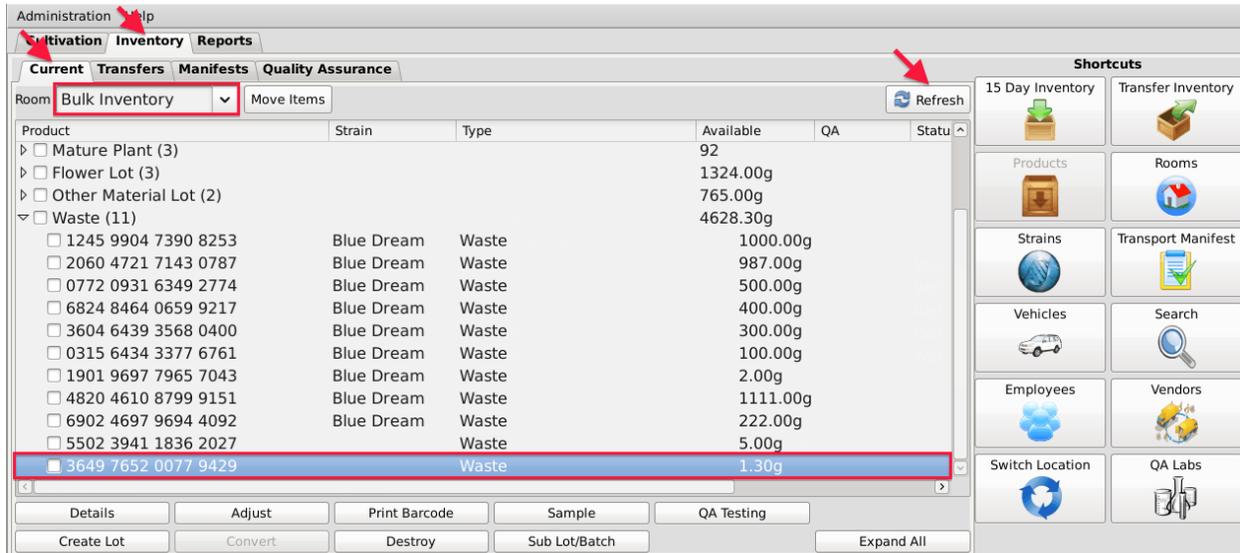
- This will bring up the “Collect Waste” screen:



- Enter in the amount of general waste collected and click “OK”.



- Navigate to the “Inventory” tab, then to the “Current” sub-tab, and then select the “Bulk Inventory” room from the room drop down to find the collected waste as a line-item with its own Traceability Identifier. You may need to click on the “Refresh” button before the system will display the item.



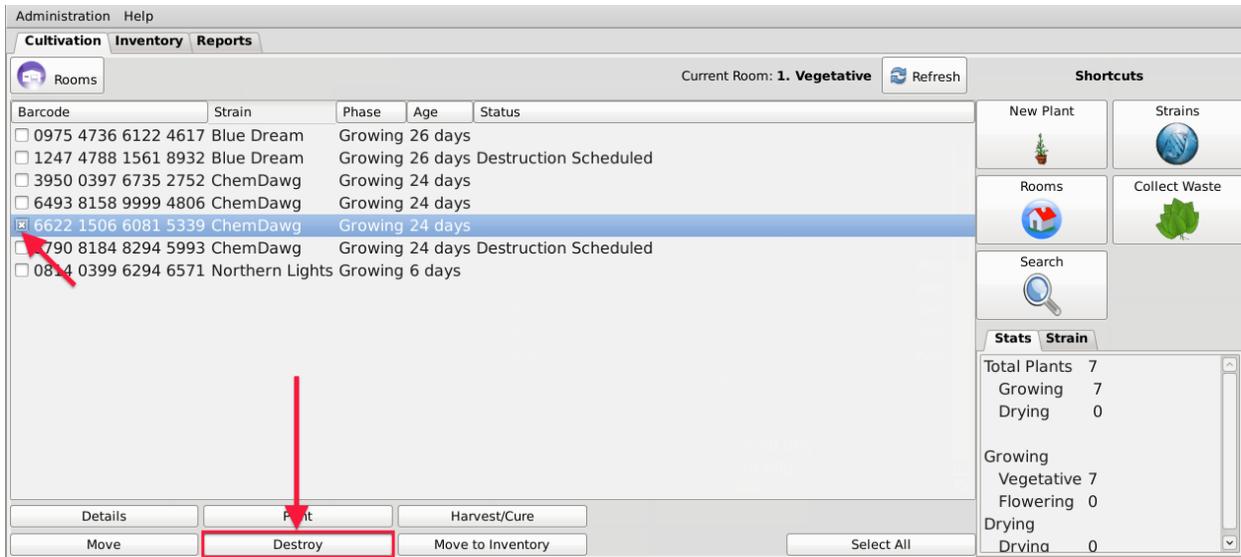
## Schedule Plant Destruction

This function allows you to schedule a plant for destruction. This event begins the 72-hour waiting period before the Destroy Plant function may be used on the plant.

There are two methods through which you may schedule a plant for destruction.

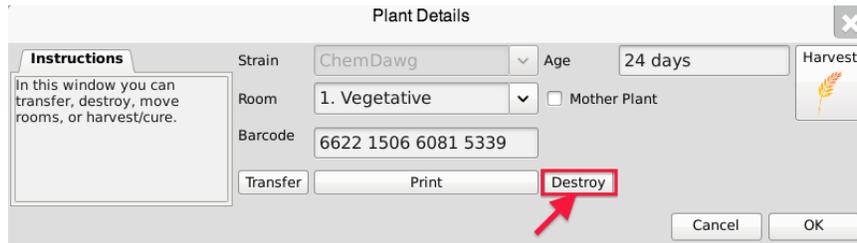
### Method 1

- Navigate to the Plant Room within which the to-be-destroyed plant is located.
- Click on the check box to the left of the plant to be destroyed.
- Click on the “Destroy” button at the bottom of the screen.



## Method 2

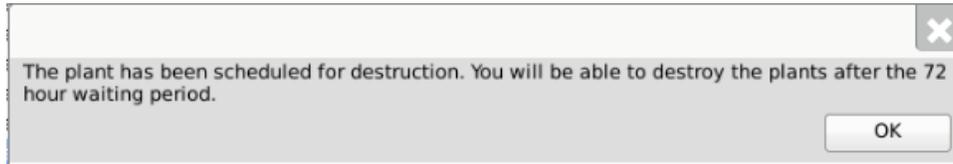
- Bring up the to-be-destroyed plant's Plant Information screen, either by selecting the plant within its room or by using the Plant Lookup function.
- Click on "Destroy"



- Regardless of which method you use to click "Destroy", a pop-up window appears wherein you must select a Destruction Choice **and enter the reason** the item is being destroyed. Click "OK" when completed.



- Another pop-up window appears notifying you that the Traceability System has accepted the scheduled destruction and provides a reminder that the plant may be destroyed after the 72-hour waiting period has expired.



- Note that the plant's Status is updated to "Destruction Scheduled".

Administration Help

Cultivation Inventory Reports

Rooms Current Room: 1. Vegetative Refresh

Barcode	Strain	Phase	Age	Status
<input type="checkbox"/> 0975 4736 6122 4617	Blue Dream	Growing	26 days	
<input type="checkbox"/> 1247 4788 1561 8932	Blue Dream	Growing	26 days	Destruction Scheduled
<input type="checkbox"/> 3950 0397 6735 2752	ChemDawg	Growing	24 days	
<input type="checkbox"/> 6493 8158 9999 4806	ChemDawg	Growing	24 days	
<input checked="" type="checkbox"/> 6622 1506 6081 5339	ChemDawg	Growing	24 days	Destruction Scheduled
<input type="checkbox"/> 8790 8184 8294 5993	ChemDawg	Growing	24 days	Destruction Scheduled
<input type="checkbox"/> 0814 0399 6294 6571	Northern Lights	Growing	6 days	

Shortcuts: New Plant, Strains, Rooms, Collect Waste, Search

Stats Strain

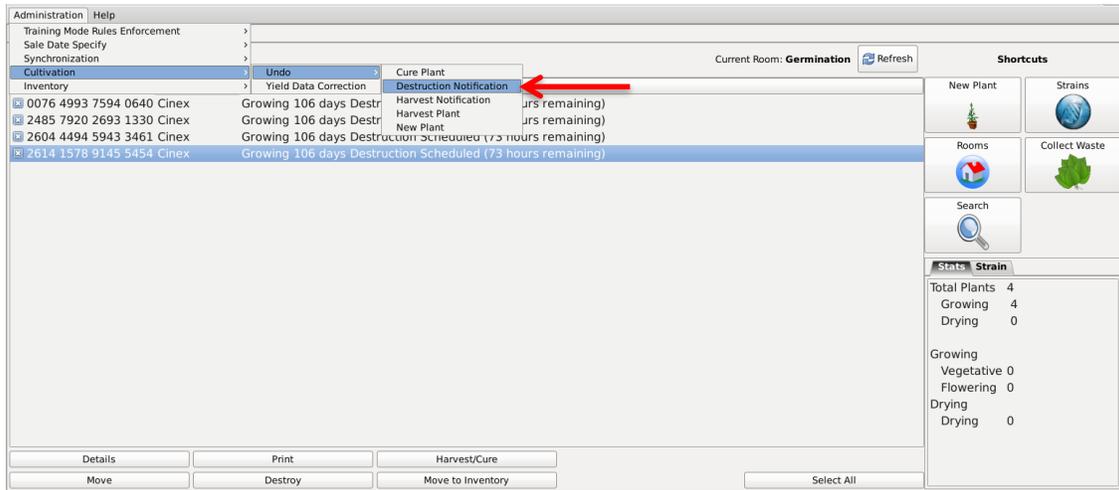
Total Plants	7
Growing	7
Drying	0
Growing Vegetative	7
Flowering	0
Drying	
Draina	0

Buttons: Details, Print, Harvest/Cure, Move, Destroy, Move to Inventory, Select All

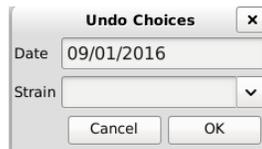
## Undo Scheduled Destruction

An "Administrator" user may remove the "Destruction Scheduled" status of a plant should it be necessary (e.g., the destruction action was committed to an incorrect plant).

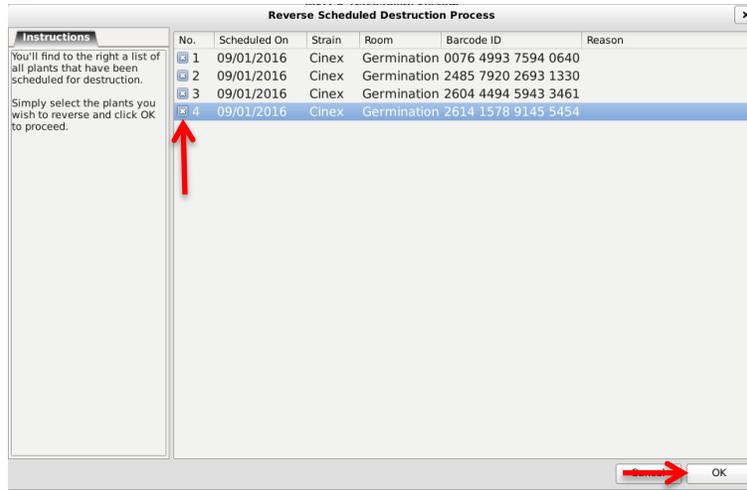
- Click on the Administration menu near the top left corner of the window.
- Hover the cursor over "Cultivation", "Undo", and then click on "Destruction Notification".



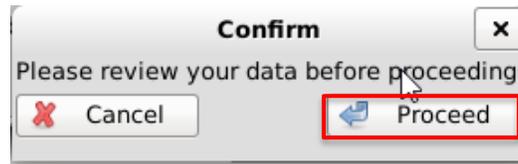
- The following pop-up window appears.



- Select the date of the to-be-undone destruction notification
  - To view all scheduled destructions for a specific day, click "OK".
  - To narrow your results to scheduled destructions of a specific strain, select a strain from the Strain drop down.
- A list of scheduled destructions based on your search parameters from the prior pop-up window appears.
- Click the check box beside the plant(s) for which the scheduled destructions(s) is(are) to be undone.
- Click "OK".



- The 'Confirm' screen displays. Click the 'Proceed' button.



- The "Destruction Scheduled" status of the selected plants will be removed.
- NOTE: If the plant's status is not immediately adjusted, click on the "Refresh" button found in the upper-right hand corner

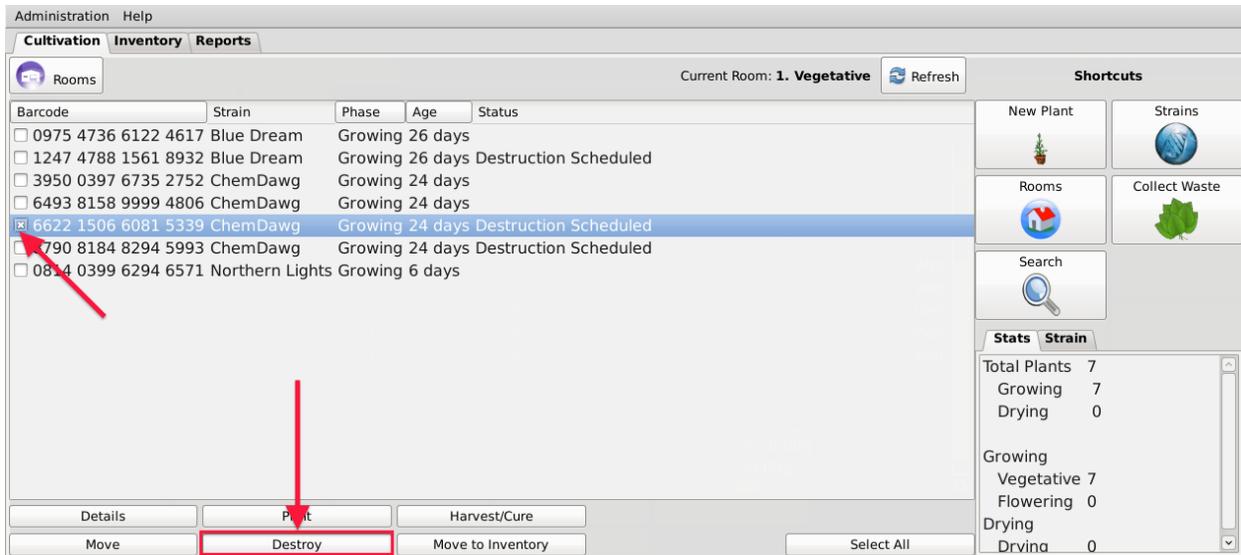
## Destroy Plant

This function allows you to destroy a plant that has been scheduled for destruction. Plants may only be destroyed after the waiting period has expired.

There are two methods through which you may click a "Destroy" button for a plant.

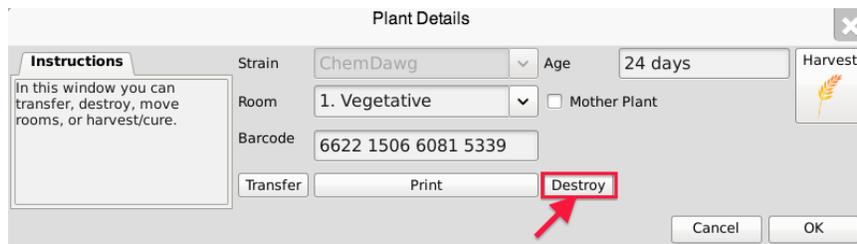
### Method 1

- Navigate to the Plant Room within which the plant scheduled for destruction is located.
- Click on the check box to the left of the plant to be destroyed.
- Click on the "Destroy" button at the bottom of the screen.

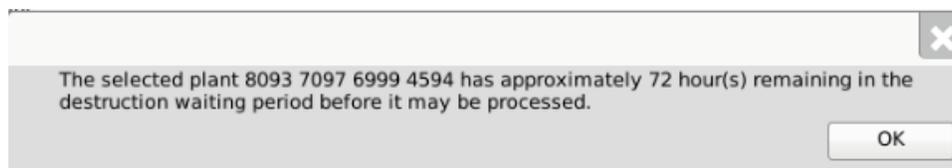


## Method 2

- Bring up the Plant Information screen for the plant scheduled for destruction, either by selecting the plant within its room or by using the Plant Lookup function
- Click on “Destroy”



- Regardless of which method you use to click “Destroy”, if the plant’s 72-hour waiting period has elapsed, then the plant is destroyed in the Traceability System.
- Should you attempt to destroy the plant prior to the 72-hour waiting period expiring, a pop-up window appears to inform you how many hours remain in the waiting period before that plant may be destroyed.



**NOTE: Destroying a plant does not delete any of that plant’s already submitted Traceability System data. It simply removes the plant from use moving forward and that plant will be identified as having been destroyed.**

## Schedule Inventory Destruction

This function allows you to schedule inventory for destruction. This event begins the 72-hour waiting period before the Destroy Inventory function may be used on the inventory item.

There are two methods through which you may schedule inventory for destruction.

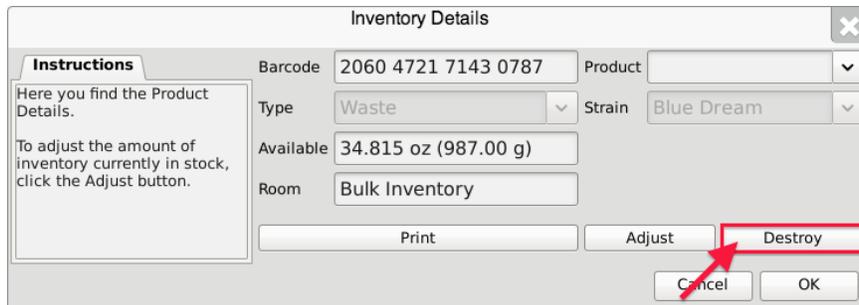
### Method 1

- Navigate to the Inventory Room within which the to-be-destroyed inventory is located (make sure that you are within the Inventory tab and the Current sub-tab).
- Click on the check box to the left of the item to be destroyed.
- Click on the “Destroy” button at the bottom of the screen.

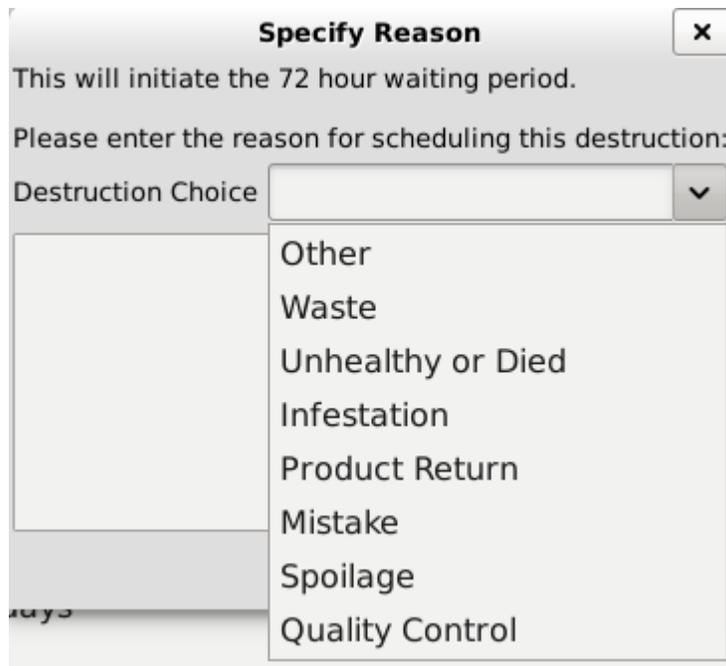
Product	Strain	Type	Available	QA	Statu
▸ <input type="checkbox"/> Clone (2)			197		
▸ <input type="checkbox"/> Other Material (8)			2859.00g		
▸ <input type="checkbox"/> Seed (3)			499		
▸ <input type="checkbox"/> Plant Tissue (1)			30		
▸ <input type="checkbox"/> Mature Plant (3)			92		
▸ <input type="checkbox"/> Flower Lot (3)			1324.00g		
▸ <input type="checkbox"/> Other Material Lot (2)			765.00g		
▾ <input checked="" type="checkbox"/> Waste (11)			4628.30g		
<input type="checkbox"/> 1245 9904 7390 8253	Blue Dream	Waste	1000.00g		
<input checked="" type="checkbox"/> 2060 4721 7143 0787	Blue Dream	Waste	987.00g		
<input type="checkbox"/> 772 0931 6349 2774	Blue Dream	Waste	500.00g		
<input type="checkbox"/> 6824 8464 0659 9217	Blue Dream	Waste	400.00g		
<input type="checkbox"/> 3604 6439 3568 0400	Blue Dream	Waste	300.00g		
<input type="checkbox"/> 0315 6434 3377 6761	Blue Dream	Waste	100.00g		
<input type="checkbox"/> 1901 9697 7965 7043	Blue Dream	Waste	2.00g		

### Method 2

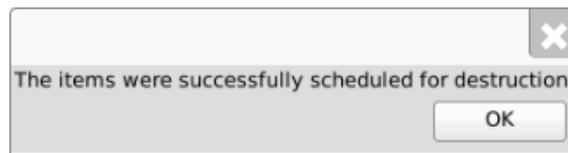
- Bring up the to-be-destroyed item’s Inventory Details screen, either by selecting the item within its room or by using the Inventory Lookup function.
- Click on “Destroy”.



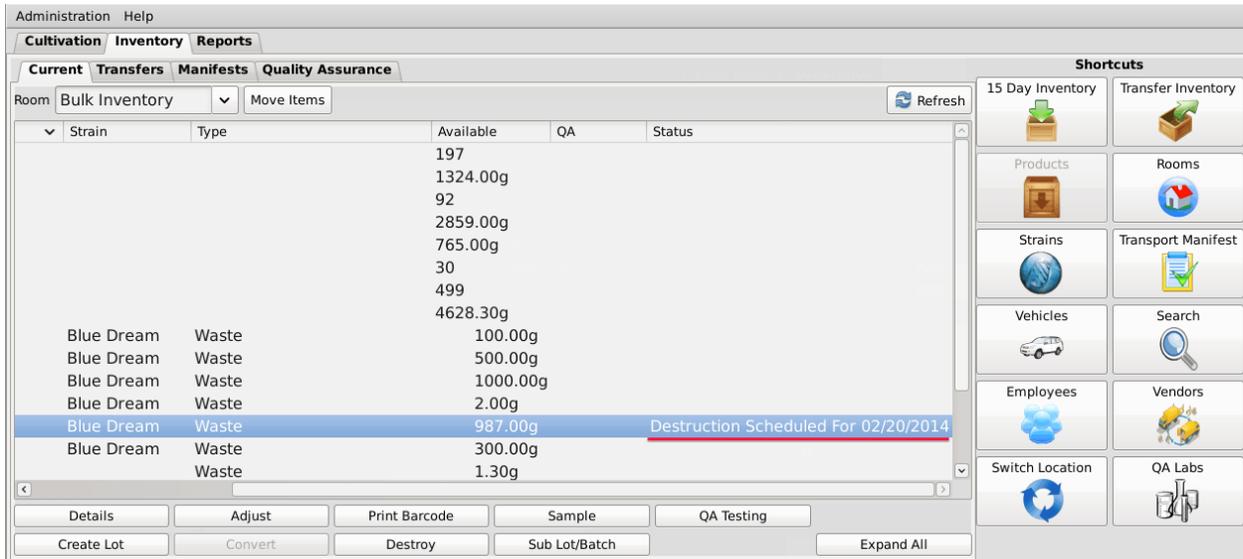
- Regardless of which method you use to click “Destroy”, a pop-up window appears wherein you must select a Destruction Choice **and enter the reason** the item is being destroyed. Click “OK” when completed.



Another pop-up window appears notifying you that the Traceability System has accepted the scheduled destruction.



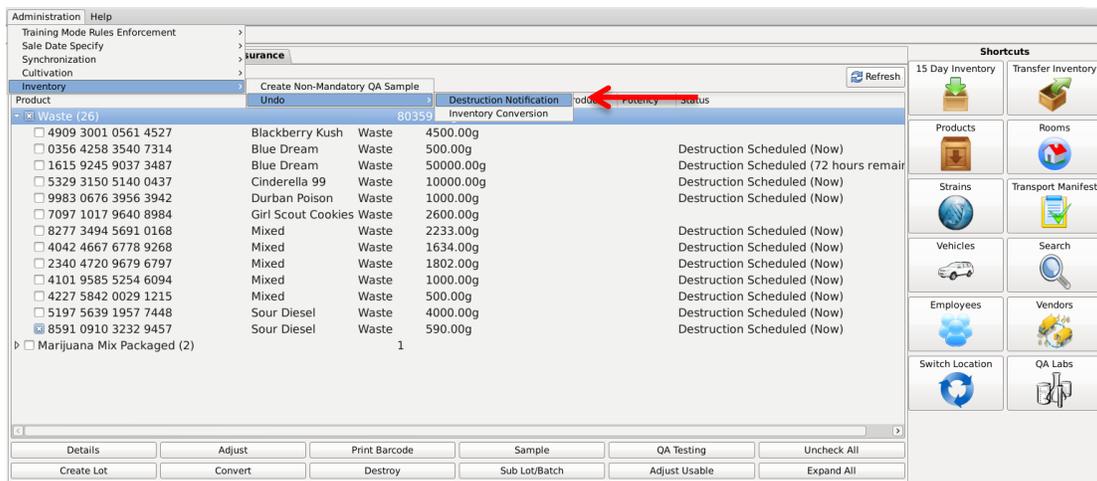
- Note that the inventory item’s Status is updated to “Destruction Scheduled for MM/DD/YYYY”.



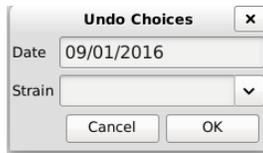
## Undo Destruction Notification - Inventory

An “Administrator” user may remove the “Destruction Scheduled” status of an inventory item should it be necessary (e.g., the destruction action was committed to an incorrect item).

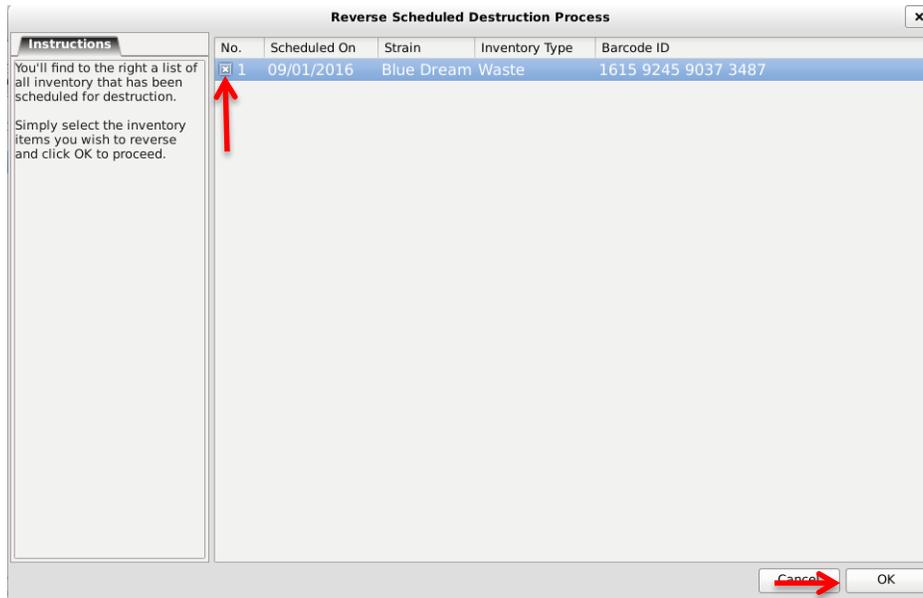
- Click on the Administration menu near the top left corner of the window.
- Hover the cursor over “Inventory”, “Undo”, and then click on “Destruction Notification”.



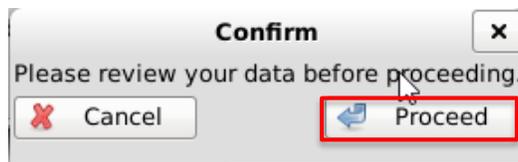
- The following pop-up window appears.



- Select the date of the to-be-undone destruction notification
  - To view all scheduled destructions for a specific day, click “OK”.
  - To narrow your results to scheduled destructions of a specific strain, select a strain from the Strain drop down.
- A list of scheduled destructions based on your search parameters from the prior pop-up window appears.
  - Click the check box beside the inventory item(s) for which the scheduled destructions(s) is(are) to be undone.
  - Click “OK”.



- The ‘Confirm’ screen displays. Click the ‘Proceed’ button.



- The “Destruction Scheduled” status of the selected items will be removed.

- NOTE: If the item's status is not immediately adjusted, click on the "Refresh" button found in the upper-right hand corner

## Destroy Inventory

This function allows you to destroy an inventory item. Inventory may only be destroyed after the waiting period has expired.

There are two methods through which you may click a "Destroy" button for inventory.

### Method 1

- Navigate to the Inventory Room within which the to-be-destroyed inventory is located (make sure that you are within the Inventory tab and the Current sub-tab).
- Click on the check box to the left of the item to be destroyed.
- Click on the "Destroy" button at the bottom of the screen.

The screenshot shows the BIOTRACKTHC software interface. At the top, there are tabs for 'Administration' and 'Help'. Below that, there are sub-tabs for 'Cultivation', 'Inventory', and 'Reports'. Under 'Inventory', there are further sub-tabs: 'Current', 'Transfers', 'Manifests', and 'Quality Assurance'. The 'Current' sub-tab is active, and the 'Room' is set to 'Bulk Inventory'. A table lists inventory items with columns for Product, Strain, Type, Available, QA, and Status. One item, '2060 4721 7143 0787', is selected. At the bottom of the screen, there are several buttons: 'Details', 'Adjust', 'Print Barcode', 'Sample', 'QA Testing', 'Create Lot', 'Convert', 'Destroy', 'Sub Lot/Batch', and 'Expand All'. The 'Destroy' button is highlighted with a red box. A red arrow points from the 'Destroy' button to the selected item in the table. On the right side, there is a 'Shortcuts' panel with various icons for '15 Day Inventory', 'Transfer Inventory', 'Products', 'Rooms', 'Strains', 'Transport Manifest', 'Vehicles', 'Search', 'Employees', 'Vendors', 'Switch Location', and 'QA Labs'.

Product	Strain	Type	Available	QA	Status
Clone (2)			197		
Other Material (8)			2859.00g		
Seed (3)			499		
Plant Tissue (1)			30		
Mature Plant (3)			92		
Flower Lot (3)			1324.00g		
Other Material Lot (2)			765.00g		
Waste (11)			4628.30g		
1245 9904 7390 8253	Blue Dream	Waste	1000.00g		
<input checked="" type="checkbox"/> 2060 4721 7143 0787	Blue Dream	Waste	987.00g		
772 0931 6349 2774	Blue Dream	Waste	500.00g		
6824 8464 0659 9217	Blue Dream	Waste	400.00g		
3604 6439 3568 0400	Blue Dream	Waste	300.00g		
0315 6434 3377 6761	Blue Dream	Waste	100.00g		
1901 9697 7965 7043	Blue Dream	Waste	2.00g		

### Method 2

- Bring up the to-be-destroyed item's Inventory Details screen, either by selecting the item within its room or by using the Inventory Lookup function.
- Click on "Destroy".

- If the item's 72-hour waiting period has elapsed, then the item is destroyed in the Traceability System.
- Should you attempt to destroy the inventory item prior to the 72-hour waiting period expiring, a pop-up window appears to inform you how many hours remain in the waiting period before that plant may be destroyed.

**NOTE: Destroying an Inventory Item does not delete any of that item's already submitted Traceability System data. It simply removes the inventory from use moving forward and that inventory will be identified as having been destroyed.**



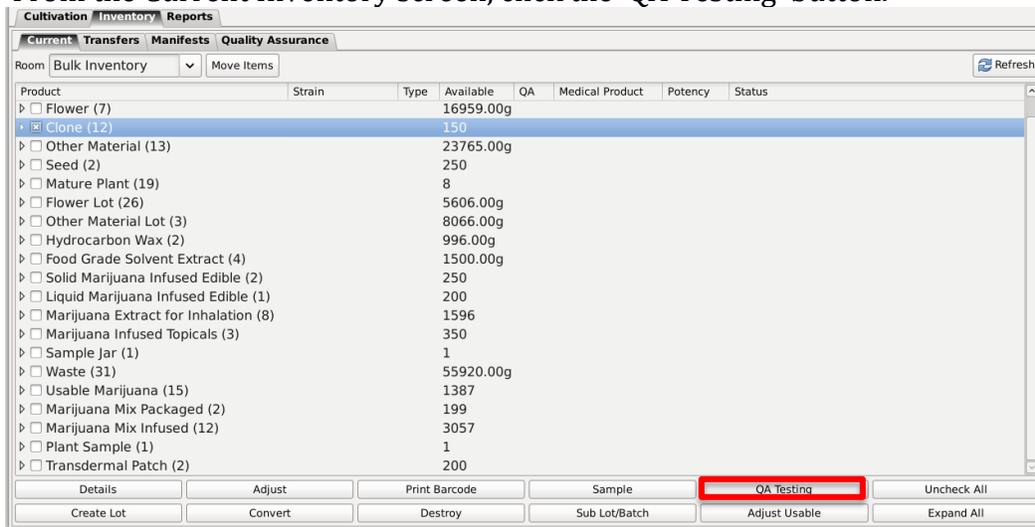
## Chapter 17: Samples

In this chapter, you will learn how to:

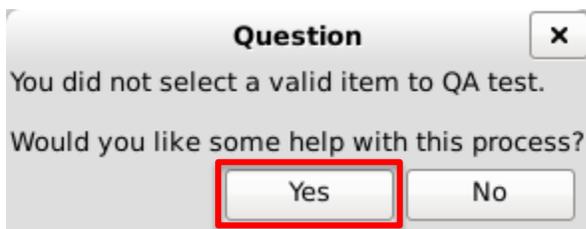
- ✓ Account for inventory deductions resulting from QA test samples. (QA Sample)
- ✓ Account for inventory deductions resulting from Non-Mandatory QA test samples. (Non-Mandatory QA Sample)
- ✓ Account for inventory deductions resulting from samples for negotiating a sale. (Vendor Sample)
- ✓ Account for inventory deductions resulting from internal sampling. (Employee Sample)
- ✓ Reassign samples to another vendor

### QA Testing Sample

From the Current Inventory screen, click the 'QA Testing' button.



1. The 'Question' screen displays. Click the 'Yes' button to view valid items.



2. Select the 'Inventory Type' and check the box next to the inventory item to be tested.
3. Click the 'OK' button.

**QA Assistance**

**Instructions**

This screen can assist you in choosing an item to QA test. Select the inventory type you wish to QA test from the drop-down to the right.

Once you have done this, you will see a list of eligible items in the box below.

Select one (1) of the items by checking the box to the left of the item. You may then proceed by clicking OK to begin the process of providing the QA details.

Inventory Type: Flower Lot

Select an inventory type above, then select an eligible item below:

Barcode ID	Strain
<input checked="" type="checkbox"/> 9999 9999 6000 1005	Northernberry
<input type="checkbox"/> 9999 9999 6000 1122	Northernberry
<input type="checkbox"/> 9999 9999 6000 1313	Northernberry
<input type="checkbox"/> 9999 9999 6000 1367	Northernberry
<input type="checkbox"/> 3065 6231 4292 1516	Northernberry
<input type="checkbox"/> 0006 0358 5518 5509	Northernberry
<input type="checkbox"/> 0450 6737 6258 8646	Northernberry
<input type="checkbox"/> 5355 1363 6179 5449	Northernberry
<input type="checkbox"/> 6671 6375 4091 2233	Northernberry
<input type="checkbox"/> 5105 3438 6541 3560	Northernberry

Cancel OK

4. The 'QA Test' screen displays. Enter the 'Sample Quantity'.
5. Select the 'Lot Use'.
6. Select the 'QA Lab'.
7. Click the 'OK' button.

**QA Test**

**Instructions**  
Please select the lab you will be sending the QA sample to. Once selected, you will also need to enter the quantity of the product that is being sampled.

Product: [ ] Strain: Blue Dream  
 Barcode: 9999 9944 4000 0164 Type: Flower Lot  
 Sample Quantity: 4.00 g  
 Lot Use: Usable Marijuana  
 QA Lab: Analytical 360, LLC.  
 Clear

**QA Tests Required**  
The following tests will be required

- Moisture Content
- Potency Analysis
- Foreign Matter Inspection
- Microbiological Screening

Cancel OK

8. The 'Confirm' screen displays. Click the 'Proceed' button.

**Confirm**

Please review your data before proceeding.

Cancel Proceed

Note: Once a valid item has been QA Sampled, if the same item needs additional retesting it will require approval. You will get an error message if this is the case.

**Error**

You attempted to QA sample an inventory item that has already been successfully tested. It will need to be approved for re-testing.

OK

QA Samples **MUST** be Manifested and Transferred to the lab the QA Sample was created for.

NOTE: QA Samples DO NOT have to wait the quarantine period before being Transferred. QA Samples can be created and then immediately Manifested and Transferred to the selected lab.

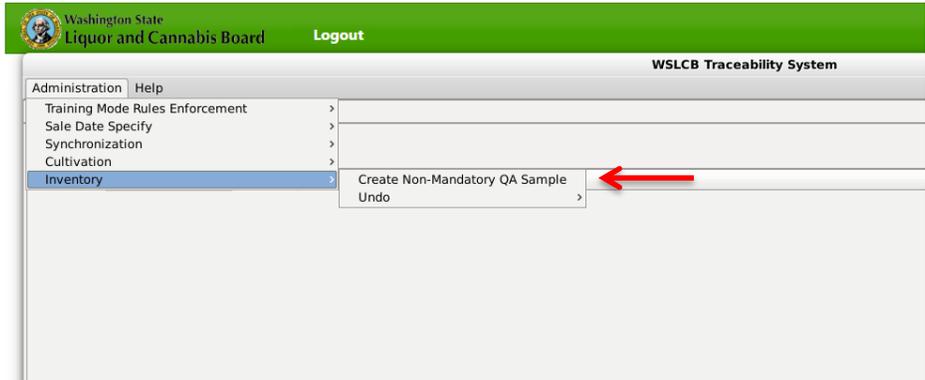
Once the Lab has received the sample they will test it and upload the test results to the Traceability System. The information in the QA column will change from “Pending” to “Passed” or “Failed”.

Product	Strain	Type	Available	QA	Status
▸ <input type="checkbox"/> Clone (2)			197		
▸ <input type="checkbox"/> Other Material (8)			3659.00g		
▸ <input type="checkbox"/> Seed (3)			499		
▸ <input type="checkbox"/> Plant Tissue (1)			30		
▸ <input type="checkbox"/> Mature Plant (3)			92		
▾ <input type="checkbox"/> Flower Lot (3)			1329.00g		
<input checked="" type="checkbox"/> 0000 0001 0000 0096	Blue Dream	Flower Lot	679.00g	Passed QA	
<input type="checkbox"/> 0000 0001 0000 0098	Blue Dream	Flower Lot	155.00g	Passed QA	Destru
<input type="checkbox"/> 0000 0001 0000 0104	Blue Dream	Flower Lot	495.00g	Pending QA	
▸ <input type="checkbox"/> Other Material Lot (2)			765.00g		
▸ <input type="checkbox"/> Waste (10)			4627.00g		

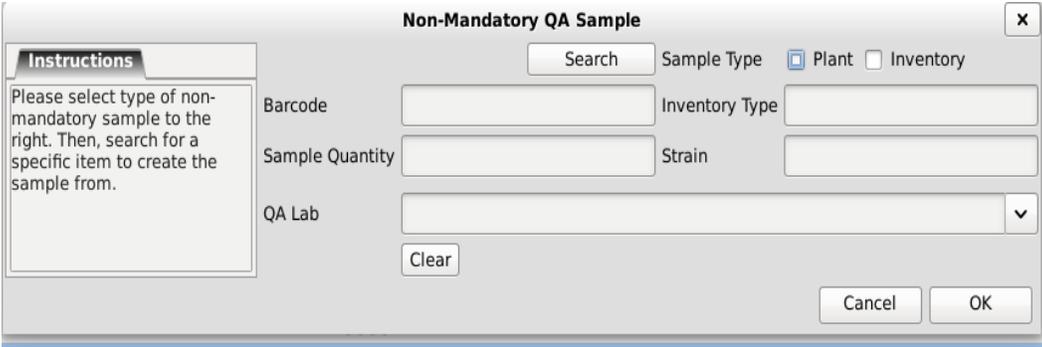
## Create Non-Mandatory QA Testing Sample

This function will create a sample in the Traceability System of plant or inventory material designated to a QA lab for optional testing.

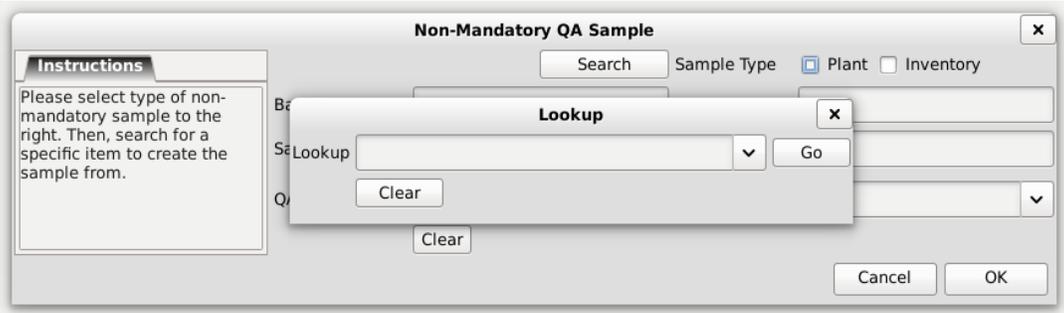
1. Navigate to Administration> Inventory> Create Non-Mandatory QA Sample



The following screen will appear:



1. Select whether the sample will be from plant or inventory by clicking the appropriate Sample Type checkbox.
2. Click Search, enter the barcode of the item on the lookup screen and click go. Inventory Type and Strain will automatically populate from the item you selected.



3. Enter the sample size into the Sample Quantity field.
4. Select the 'QA Lab'.

5. Click the 'OK' button.

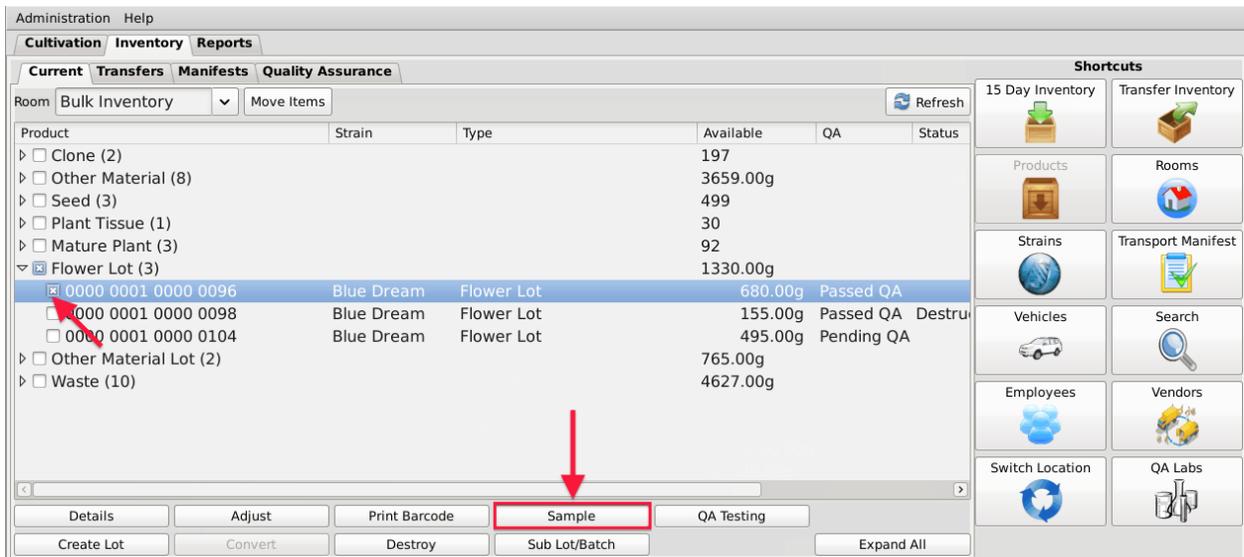
**Note: Non- Mandatory QA Samples **MUST** be Manifested and Transferred to the lab the QA Sample was created for.**

### Account for Free Sample to Employees or Vendors

This function will notify the Traceability System of inventory deductions resulting from free samples provided to another licensee for purposes of negotiating a sale and samples provided to Employee for internal quality sampling.

**Note: Though the example screen shots illustrate the accounting for internal sampling (Employee Sample), samples for negotiating a sale (Vendor Sample) follow the same path.**

- Navigate to the Inventory Room within which the to-be-sampled inventory is located (make sure that you are within the Inventory tab and the Current sub-tab).
- If the product groups are collapsed, click on the expand arrow to view all of the available inventory.
- Click on the check box to left of the item to be sampled.
- Click on the "Sample" button at the bottom of the screen



- This will bring up the Sample screen.

**Instructions**

Please select whether the recipient of the sample will be another vendor or an employee. Once selected, you will also need to enter the quantity of the product that is being sampled.

**Sample**

Product:  Strain: Blue Dream

Barcode: 9999 9944 4000 0096 Type: Usable Marijuana

Sample Quantity:

Vendor:  or Employee:

Educational Sample

Buttons: Clear, Cancel, OK

- From the Sample screen,
  - Enter the Sample Quantity, and
  - Select the recipient of the sample from either
    - Vendor drop down if for negotiating a sale. (Vendor Sample)
    - Employee drop down if internal sampling. (Employee Sample)

**Samples**

**Instructions**  
Please select whether the recipient of the sample will be another vendor or an employee. Once selected, you will also need to enter the quantity of the product that is being sampled.

Product: Blue Deram    Strain: Blue Dream  
 Barcode: 0000 0001 0000 0096    Type: Flower Lot  
 Sample Quantity: 1.00 g  
 Vendor:   
 or  
 Employee: John Smith, Jane Doe, Alex Krochmal

- Click on the “OK” button when complete.

**Samples**

**Instructions**  
Please select whether the recipient of the sample will be another vendor or an employee. Once selected, you will also need to enter the quantity of the product that is being sampled.

Product: Blue Deram    Strain: Blue Dream  
 Barcode: 0000 0001 0000 0096    Type: Flower Lot  
 Sample Quantity: 1.00 g  
 Vendor:   
 or  
 Employee: Alex Krochmal  
 Clear

Cancel    OK

**Note: All samples receive a newly generated barcode/inventory ID number for the transportation manifest.**

**Note: All Vendor samples when correctly created will display “Passed QA (Vendor Sample)” or “Pending QA (Vendor Sample)” in the QA column. You will need to wait until QA testing has passed before sending samples to a Vendor. All Vendor sample need to be Manifested and pass the Quarantine period before being Transferred to a Vendor.**

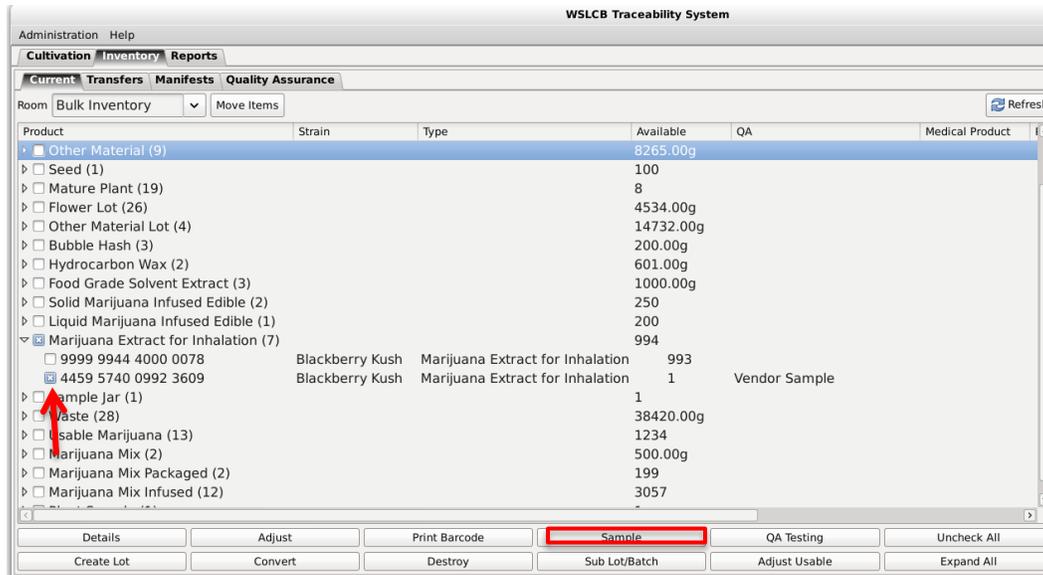
Available	QA	Status
1902.00g	Pending QA	
2226.00g	Pending QA	
2051.00g	Pending QA	
676.00g	Pending QA	
1.00g	Pending QA (Vendor Sample)	
1.00g	Pending QA (Vendor Sample)	

- The Traceability System automatically deducts Employee samples from inventory once the sampling action is complete. The Employee samples DO NOT need to be Manifested and Transferred to the employee.
- Vendor Samples must be Manifested and Transferred in the same manner as any other shipment to a Vendor. When Transferring a properly created Vendor Sample the price section for that line item will be grayed out so you can transfer it as a free sample.
- Vendor Samples are allocated to that Vendor and can not be given to a different Vendor.

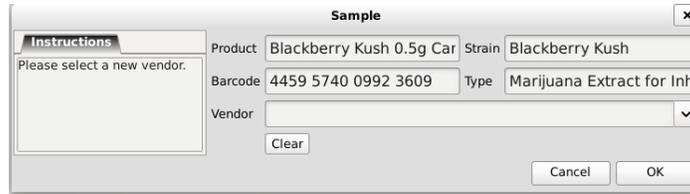
## Reassign Vendor Sample

This function will reassign a sample designated for one vendor to a different vendor.

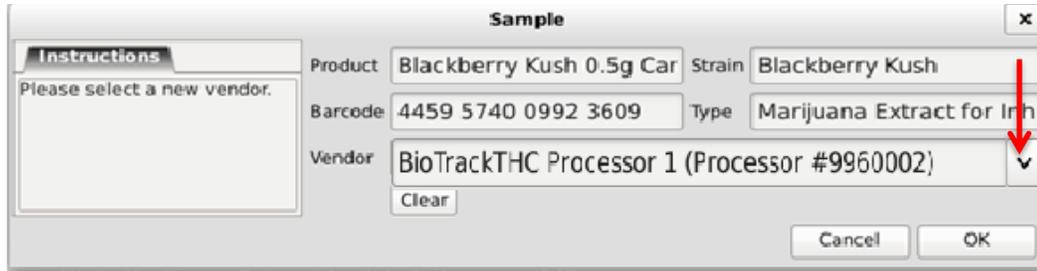
- Navigate to the Inventory Room within which the vendor sample is located (make sure that you are within the Inventory tab and the Current sub-tab).
- If the product groups are collapsed, click on the expand arrow to view all of the available inventory.
- Click on the check box to left of the vendor sample.
- Click on the “Sample” button at the bottom of the screen



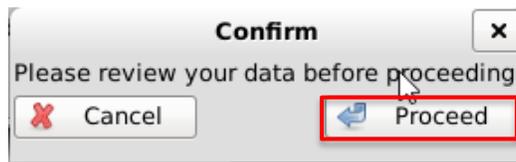
- This will bring up the Sample screen.



- Select the Vendor from the dropdown menu and click 'OK' when complete.



- The 'Confirm' screen displays. Click the 'Proceed' button.



- The following screen will appear indicating the sample was successfully reassigned



## Chapter 18: Inventory Adjustments

In this chapter, you will learn how to:

- ✓ Adjust Inventory

### Types of Inventory Adjustments

This function will notify the Traceability System of inventory deductions that are not attributable to sales, samples, or destruction. The list of the different adjustment types and guidelines with respect to when each type should be used are as follows:

Type	Explanation
Inventory Audit	If after performing an inventory audit you find that actual inventory quantities do not match quantities as reported in the Traceability System, and you are unable to determine an explanation for the difference.
Theft.	If inventory loss is determined to be due to theft.
Seizure by Federal, State, Local, or Tribal Law Enforcement.	If inventory loss occurred because of law enforcement seizure.
Mistake	If it is determined that prior data submitted to the Traceability System was keyed incorrectly. (This is the only type of adjustment that could result in an inventory increase).
Moisture Loss	If Other Material with a status of "Wet" (wet weight resulting from a harvest event) is subsequently dried.

Although the following example screen shots illustrate an inventory adjustment due to theft, all of the inventory adjustment types follow the same path.

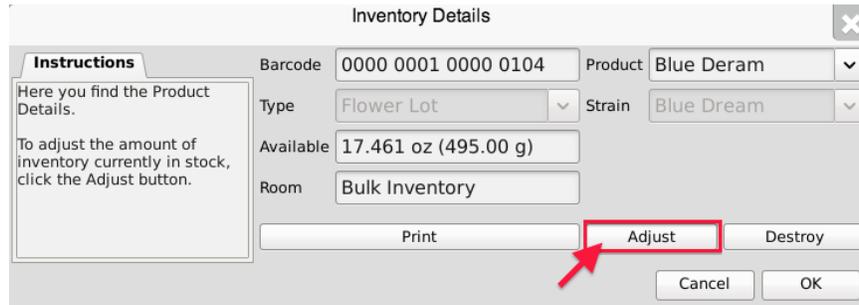
### Accessing the Inventory Adjustment Screen

You may access the inventory adjustment screen by using either of two methods:

#### Method 1

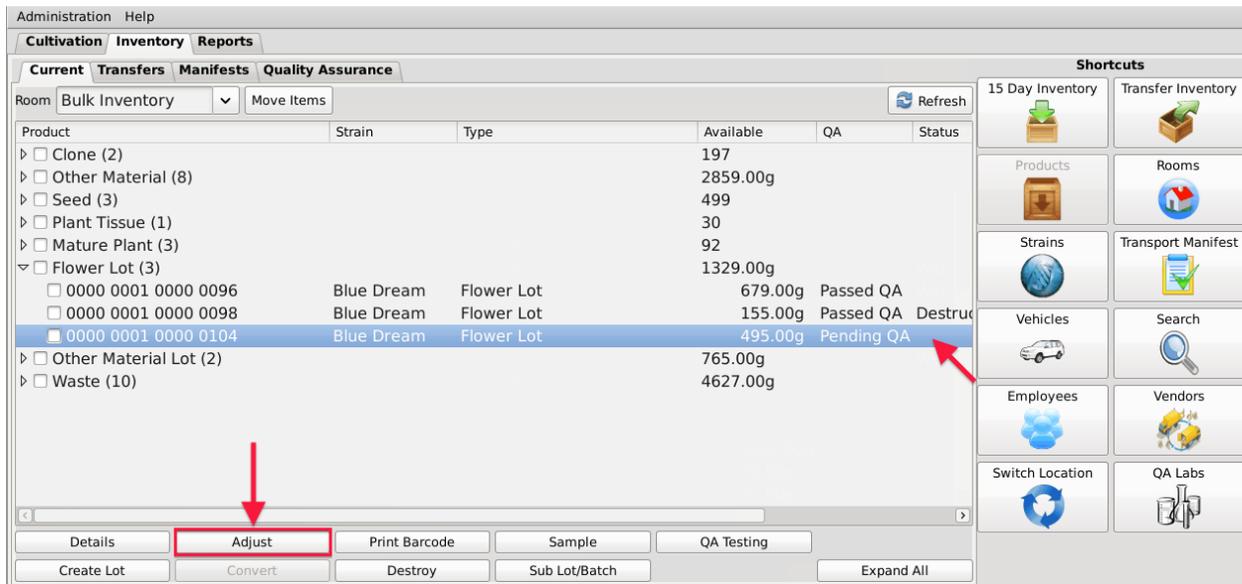
- Bring up the Inventory Details screen for the item to-be-adjusted, either by double-clicking the item within its room or by using the Inventory Lookup function described earlier.

- Click on the “Adjust” button.



## Method 2

- Navigate to the Inventory Room within which the to-be-adjusted item is located (make sure that you are within the Inventory tab and the Current sub-tab).
- Select the item to be adjusted and click on the “Adjust” button found at the bottom of the screen.



## Adjust Inventory

- Regardless of which method you use, the Inventory Adjustment screen will appear.

WSLCB

**Instructions**  
To make an inventory adjustment, simply weigh the inventory and the new amount will be shown to the right. When you are finished, click OK.

Product: Blue Deram    Strain: Blue Dream  
Barcode: 0000 0001 0000 0104    Type: Flower Lot  
Current Weight: 495.00 g  
New Weight:   
Adjustment Type:

Comments

Cancel    OK

- From the Inventory Adjustment screen,
  - Enter the New Weight (current actual weight that needs to be reflected in the Traceability System), and
  - Select the Adjustment Type via the drop down.

WSLCB

**Instructions**  
To make an inventory adjustment, simply weigh the inventory and the new amount will be shown to the right. When you are finished, click OK.

Product: Blue Deram    Strain: Blue Dream  
Barcode: 0000 0001 0000 0104    Type: Flower Lot  
Current Weight: 495.00 g  
New Weight: 490.00 g  
Adjustment Type:

Inventory Audit  
Theft  
Seizure by Federal, State, Local or Tribal Law Enforcement  
Mistake  
Moisture Loss  
Depleted

- Type in a detailed explanation for the inventory adjustment within the Comments box.
- Click the “OK” button when complete.

WSLCB

**Instructions**  
To make an inventory adjustment, simply weigh the inventory and the new amount will be shown to the right. When you are finished, click OK.

Product: Blue Deram    Strain: Blue Dream  
Barcode: 0000 0001 0000 0104    Type: Flower Lot  
Current Weight: 495.00 g  
New Weight: 490.00 g  
Adjustment Type: Theft

Comments  
Stolen by employee #1234 who has been terminated.

Cancel    OK

- The item now reflects the actual weight and the reason for the discrepancy has been submitted.

Administration Help

**Cultivation Inventory Reports**

Current Transfers Manifests Quality Assurance

Room Bulk Inventory Move Items Refresh

Product	Strain	Type	Available	QA	Status
Clone (2)			197		
Other Material (8)			2859.00g		
Seed (3)			499		
Plant Tissue (1)			30		
Mature Plant (3)			92		
Flower Lot (3)			1324.00g		
0000 0001 0000 0096	Blue Dream	Flower Lot	679.00g	Passed QA	
0000 0001 0000 0098	Blue Dream	Flower Lot	155.00g	Passed QA	Destroyed
0000 0001 0000 0104	Blue Dream	Flower Lot	490.00g	Pending QA	
Other Material Lot (2)			765.00g		
Waste (10)			4627.00g		

Shortcuts: 15 Day Inventory, Transfer Inventory, Products, Rooms, Strains, Transport Manifest, Vehicles, Search, Employees, Vendors, Switch Location, QA Labs

Buttons: Details, Adjust, Print Barcode, Sample, QA Testing, Create Lot, Convert, Destroy, Sub Lot/Batch, Expand All

### Instructions Specific to Seizure by Federal, State, Local, or Tribal Law Enforcement

Though all adjustments should include as much detail as reasonable within the Comments box, should any plant or inventory be seized by enforcement, the Licensee is responsible for including incident-specific information such as the name of the agency seizing the product; case or citation number; the name, rank, and badge number of the officer involved; and the reason for the seizure, if known.

WSLCB

**Instructions**  
To make an inventory adjustment, simply weigh the inventory and the new amount will be shown to the right. When you are finished, click OK.

Product: Blue Deram Strain: Blue Dream  
 Barcode: 0000 0001 0000 0086 Type: Flower Lot  
 Current Weight: 316.00 g  
 New Weight: 0.00 g  
 Adjustment Type: Seizure by Federal, State, Local or Tribal Law Enforcer

**Comments**  
 Agency: Thurston County Sheriff's Office  
 Case Number: 13579  
 Officer Name: Lieutenant Dan Taylor  
 Badge Number: 5678

Buttons: Cancel, OK

## Chapter 20: Miscellaneous

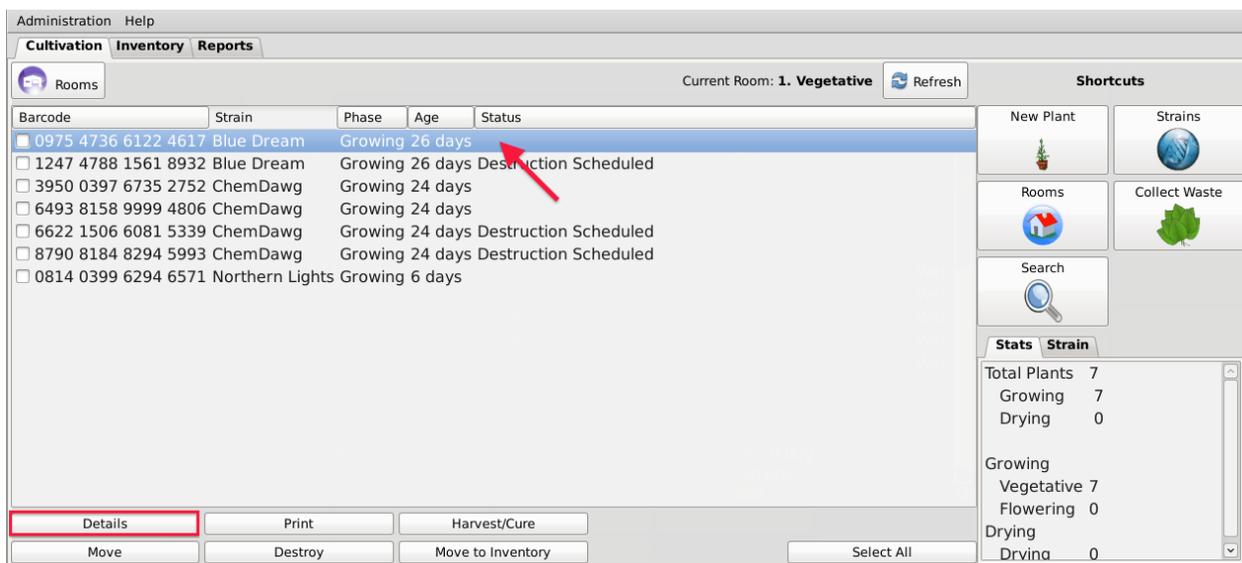
In this chapter, you will learn how to:

- ✓ Transfer mature plant from Cultivation to Inventory

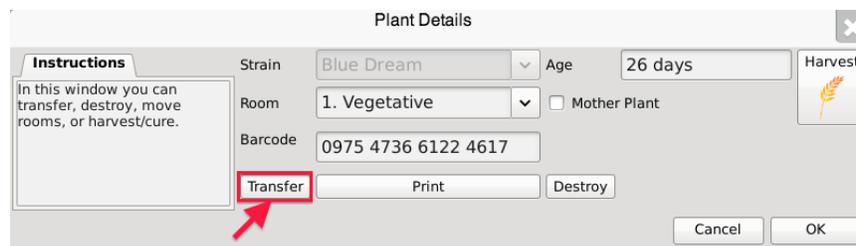
### Plant Transfer from Cultivation to Inventory

This function allows transfers a plant out of the Cultivation area and into Inventory for the purposes of selling a mature plant in a Producer-to-Producer transaction. (May not be available in all areas)

Double-click on a plant to view the Plant Information screen for that plant. Alternatively, you may single-click the plant to highlight it, and then click the “Details” button found in the bottom-left corner of the screen.



- Click on the “Transfer” button.



- Upon confirming the transfer, the plant may be found within the Bulk Inventory Room and may be placed on a transportation manifest for a Producer-to-Producer sale.

Administration Help

**Cultivation** **Inventory** **Reports**

**Current** **Transfers** **Manifests** **Quality Assurance**

Room: Bulk Inventory

Product	Strain	Type	Available	QA	Status
▸ <input type="checkbox"/> Clone (2)			197		
▸ <input type="checkbox"/> Other Material (8)			2859.00g		
▸ <input type="checkbox"/> Seed (3)			499		
▸ <input type="checkbox"/> Plant Tissue (1)			30		
▾ <input type="checkbox"/> Mature Plant (4)			93		
<input checked="" type="checkbox"/> 0975 4736 6122 4617	Blue Dream	Mature Plant	1		
<input type="checkbox"/> 0000 0001 0000 0024	Blueberry	Mature Plant	30.00		
<input type="checkbox"/> 0000 0001 0000 0084	ChemDawg	Mature Plant	12		
<input type="checkbox"/> 0000 0001 0000 0095	Sour Diesel	Mature Plant	50		
▸ <input type="checkbox"/> Flower Lot (3)			1324.00g		
▸ <input type="checkbox"/> Other Material Lot (2)			765.00g		
▸ <input type="checkbox"/> Waste (11)			4628.30g		

**Shortcuts**

- 15 Day Inventory
- Transfer Inventory
- Products
- Rooms
- Strains
- Transport Manifest
- Vehicles
- Search
- Employees
- Vendors
- Switch Location
- QA Labs