

**Title:** State Traceability versus BioTrack Commercial

**Summary:** What is the difference between the State Traceability and BioTrack Commercial systems?

**Tags:** Commercial, State Traceability, Traceability, Platform, Platforms, System, Systems, Application

The BioTrack Commercial platform is an application installed on your computer and requires a paid subscription while your State Traceability system can be accessed via the web at <https://mcp-tracking.nmhealth.org/> at no charge.

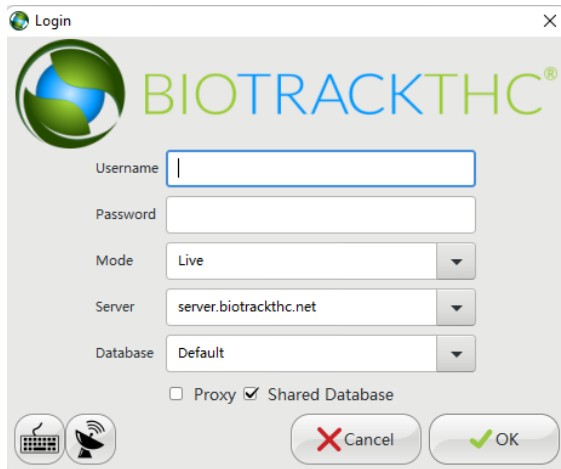
These two platforms are separate but communicate via State Monitoring settings. While you can still log into your State Traceability platform, it is for compliance purposes and will not give you as much functionality as the BioTrack Commercial platform.

**Title:** Logging into BioTrack Commercial

**Summary:** How to log into BioTrack's Commercial system

**Tags:** Logging in, Login, Log in, Username, Password, Users, User, PIN, Commercial

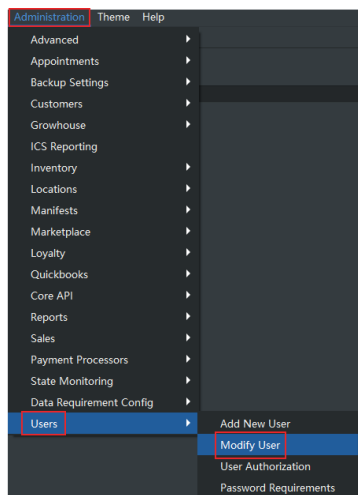
During Onboarding, you will receive your initial Administrator username and password. Any additional users are created by you or another company Administrator. BioTrack will not create additional users.



The screenshot shows a login window titled "Login" with the BioTrackTHC logo. It contains the following fields and options:

- Username: [Text input field]
- Password: [Text input field]
- Mode: [Dropdown menu, currently set to "Live"]
- Server: [Dropdown menu, currently set to "server.biotrackthc.net"]
- Database: [Dropdown menu, currently set to "Default"]
- Proxy:  Proxy  Shared Database
- Buttons: [Cancel] and [OK]

Should you need to change your or another user's password and/or PIN, go to the **Administration** menu → **Users** → **Modify User**.



**Modify User**

Username:

Password:

Full Name:

Phone #:

Administrator  
 Active  
 Manager/Agent Of Record

**Locations**

Location:

Employee

Name
Employee

**Permissions**

- Growhouse
  - Create Batches
  - Create Plant Groups
  - Create Plants
  - Create Rooms
  - Cure Plants
  - Harvest Plants
  - Modify Plants
  - Strain Notes
  - Order Tags
- Inventory
  - Create Inventory
  - Create Rooms
  - Inventory Adjust
    - No Limit
  - Inventory Audit
    - No Limit
  - Inventory Conversion
  - Inventory Modify
    - Modify Cost
    - Modify Grade
  - Switch Room
  - Transfer Inventory

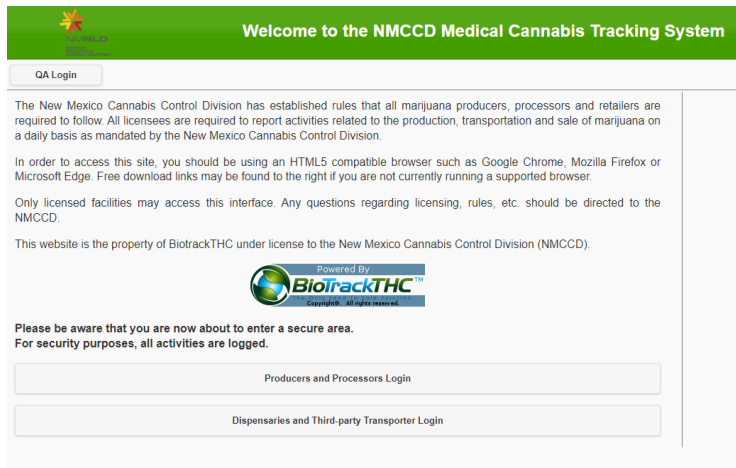
**Shortcuts**

- 
- 
- 
- 
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-

**Title:** Logging into State Traceability

**Summary:** How to log into State Traceability and steps to reset the password

**Tags:** Logging in, Login, Log in, Username, Password, UBI, Reset, State Traceability, Traceability



Video: [Logging into Traceability](#)

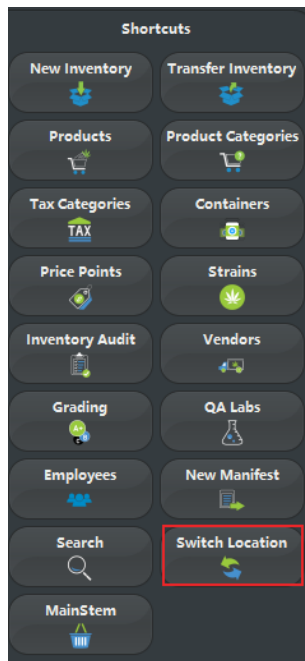
Video: [Resetting Traceability Password](#)

**Title:** Switching Locations

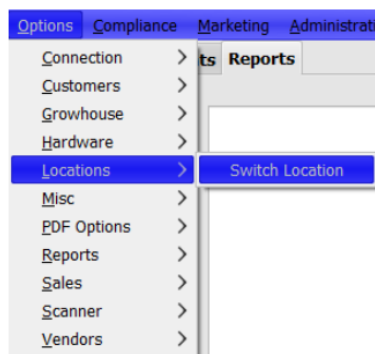
**Summary:** How to switch between locations in BioTrack's Commercial system

**Tags:** Switch Location, Switching Locations, Commercial, Locations, Change Location

Switching locations in your BioTrack Commercial system is located on the right-hand side under Shortcuts.



You will also find Switch Location under the **Options** menu → **Locations**.



This action allows you to switch between your different locations (i.e. Retail License to Cultivation License).

**Important Note:** If you have multiple licenses you want to make sure you are working under the correct license, click on the Switch Location shortcut and select the license you would like to work under

**Title:** Your State Monitoring Settings and Synchronization

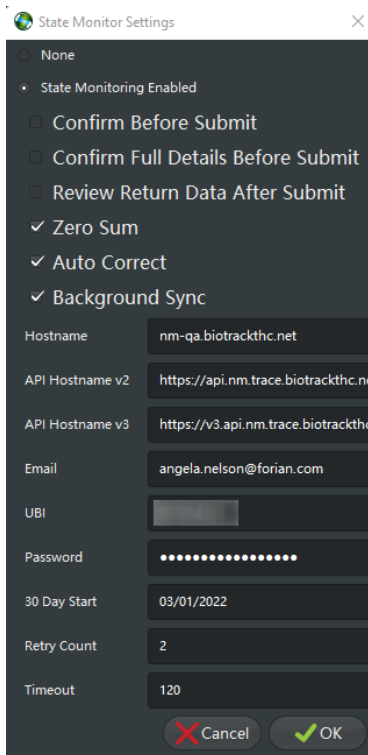
**Summary:** How to connect your BioTrack Commercial system to your State Traceability system and perform syncs

**Tags:** Commercial, State Traceability, Traceability, System, Systems, Application, State Monitoring, Sync, Synchronization

Your State Monitoring Settings are found under the **Administration** menu → **State Monitoring** → **Settings**. This is what connects you to your State side.

Below we outline the relevant fields and the information entered into each:

- Hostname  
This web address will take you to your State Traceability website.
- Email  
The email located in here corresponds with the email address the state set up when the license was approved.
- UBI  
The UBI is your Unique Business Identification provided by the state, connected to your license(s).
- Password  
This password is the same password you use when you log into your State Traceability system. This Password will expire and will need to be reset in order for your BioTrack and State side to communicate properly.



The screenshot shows a dark-themed dialog box titled "State Monitor Settings". At the top, there is a "None" button and a close "X" icon. Below this, there are several settings:

- State Monitoring Enabled
- Confirm Before Submit
- Confirm Full Details Before Submit
- Review Return Data After Submit
- Zero Sum
- Auto Correct
- Background Sync

Below these are several input fields:

- Hostname: nm-qa.biotrackthc.net
- API Hostname v2: https://api.nm.trace.biotrackthc.net
- API Hostname v3: https://v3.api.nm.trace.biotrackthc.net
- Email: angela.nelson@forian.com
- UBI: [Redacted]
- Password: [Redacted]
- 30 Day Start: 03/01/2022
- Retry Count: 2
- Timeout: 120

At the bottom, there are two buttons: "Cancel" (with a red X icon) and "OK" (with a green checkmark icon).

[Important Note](#): Your State Traceability username and password are NOT the same as your BioTrack Commercial username and password.

Under the State Monitoring Settings you'll see **Synchronization**. This tool allows you to sync all or perform partial syncs.

For example, if you have pulled a QA sample, manifested it to the lab, and have received the QA results but BioTrack has yet to show the QA results, you could sync QA samples. This will give the system an extra push, pulling the data from the State side into the BioTrack Commercial system.

**Title:** Bringing in New Inventory for Cultivation

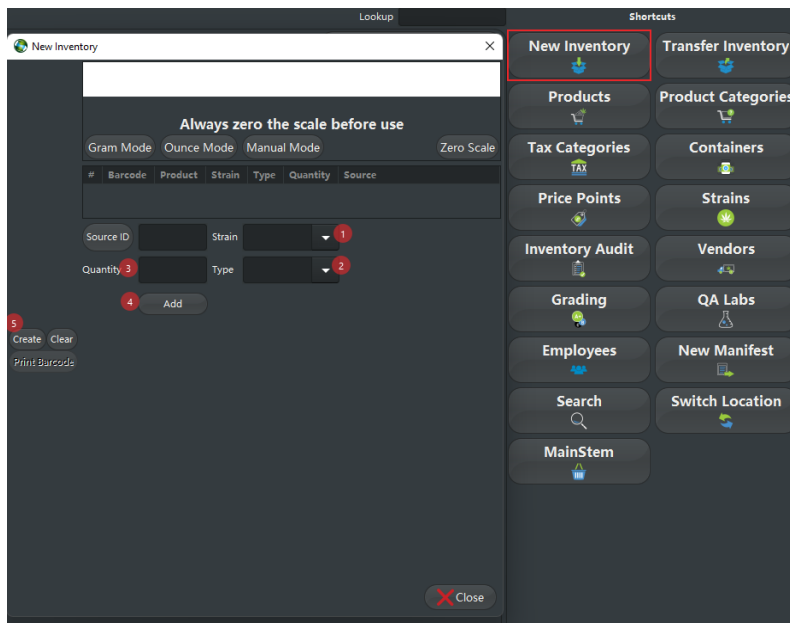
**Summary:** How to take in initial inventory for cultivation

**Tags:** Inventory, New Inventory, Inventory Window, Seed, Seeds, Clone, Clones, Cultivation, Growhouse, Commercial

For cultivators, you may need to take in seeds or clones for initial inventory or new seed genetics. Seeds cannot be manifested to you by another licensee. In the event you need your intake window opened, you will need to contact the state to have the window extended.

To take in new inventory, select **New Inventory** from the right-hand side under Shortcuts. The *New Inventory* window will appear. Follow the steps below to complete your intake of inventory.

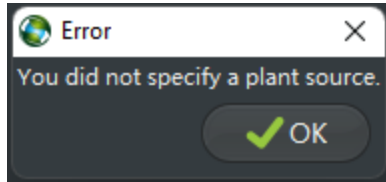
1. Select the Strain
2. Select Type of Seed or Clone
3. Enter the Quantity
4. Click the “Add” button
5. Click “Create” once you have entered all of your strain quantities. This will generate an inventory Barcode ID.



**Important Note:** You can ignore the Usable field if it appears under Quantity.

**Troubleshooting:** If you receive the following error message, please check that your State Monitoring Settings are correct. If they are correct, the error indicates that your intake window is closed and you will have to contact the state.





***Troubleshooting:*** If you do not see the *New Inventory* window shown above and the system is asking you for a Vendor and Product name, please update your terminal settings from the **Administration** menu → **Location** → **Terminal settings**. You will change your default location to the Cultivation location then log out and back in. This happens when you have more than one license.

**Title:** Bringing in New Inventory for Retail

**Summary:** How to take in inventory for retail

**Tags:** Inventory, New Inventory, Retail, Dispensary, Commercial

The **New Inventory** button located on the right-hand side under Shortcuts allows a retail location to intake items that do not contain Marijuana. For example, pipes, lighters, apparel, CBD, and so on.

**Important Note:** This will NOT be how you will take in anything containing Marijuana.

To take in new inventory, select the **New Inventory** shortcut. The *Create Inventory* window will appear. Follow the steps below to complete your intake of inventory.

1. Select the Vendor you received the product from
2. Select the Product name
3. Enter the Quantity you are taking in
4. Choose the New Room where you want the inventory to be located. It will default to Bulk Inventory.
5. Enter the Line Price which is the total amount you paid per line item. This will generate your cost per unit.
6. Click the “Add” button. This will get it in the “ready position” for intake.
7. In the **Wholesale** section, select Type of Sale, Purchase or Trade
8. Select your Method of payment
9. Choose the correct Tax category
10. Click “Create.” This will generate a Barcode for the item(s) and add them to your BioTrack Inventory.

*Troubleshooting:* If you do not see the *Create Inventory* window shown above and the system is asking you for a Source ID, please update your terminal settings from the **Administration** menu → **Location** → **Terminal settings**. You will change your default location to the Retail location then log out and back in. This happens when you have more than one license.

**Title:** Creating Inventory Rooms

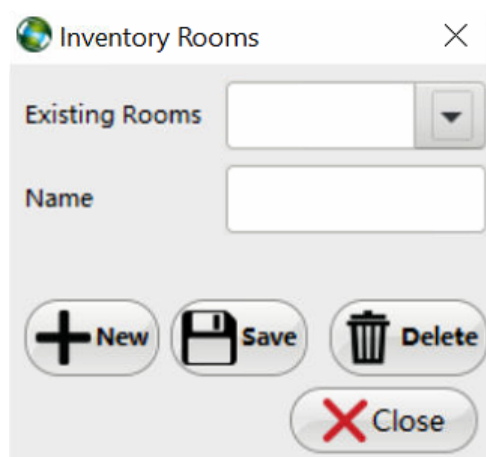
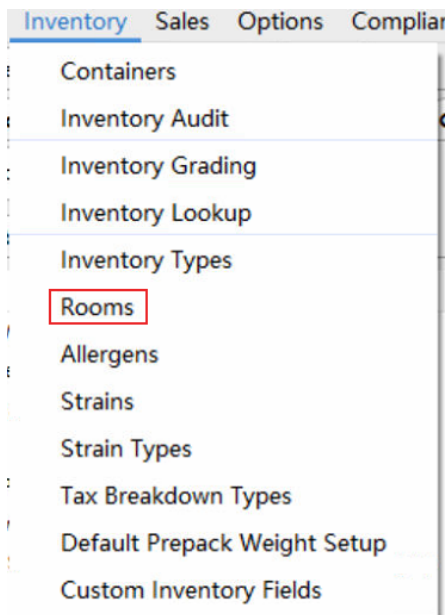
**Summary:** How to create, modify and delete rooms for inventory

**Tags:** Inventory Rooms, Inventory Room, Commercial

BioTrack will come with a default room named Bulk Inventory. This room cannot be deleted or renamed, but you can add more rooms into the system. This allows you to organize your product how you wish. Rooms can be created and named however you choose. Please see below for some common examples based on license type.

- **Retail rooms:** Vault, Safe, Sales Floor
- **Cultivation rooms:** Seed Bank, Vault, Packaging, By Vendor Name
- **Manufacturing rooms:** Packaging, Kitchen, By Vendor Name

You can Create, Delete or Modify rooms by going to the **Inventory** menu → **Rooms**. The *Inventory Rooms* window will appear for you to complete your desired action.



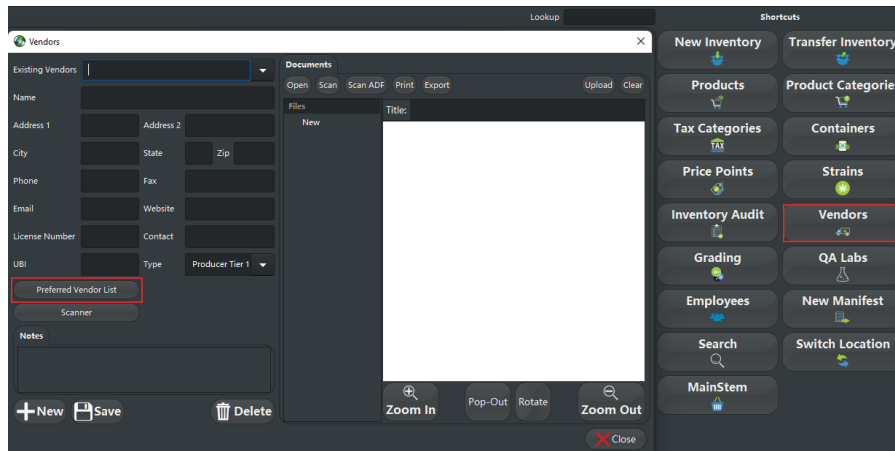
*Important Note:* Before deleting a room, please make sure there is no Inventory in there.

**Title:** Accessing Your Preferred Vendor List

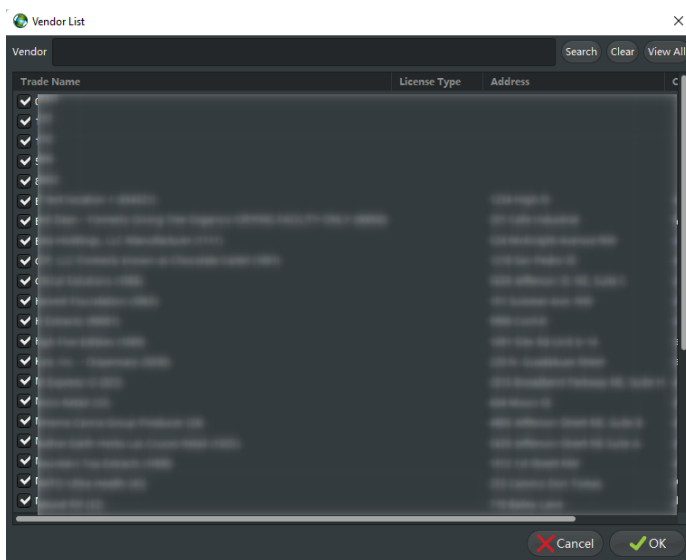
**Summary:** How to access your vendors and your State's preferred vendor list

**Tags:** Vendor, Vendors, Vendor List, Commercial

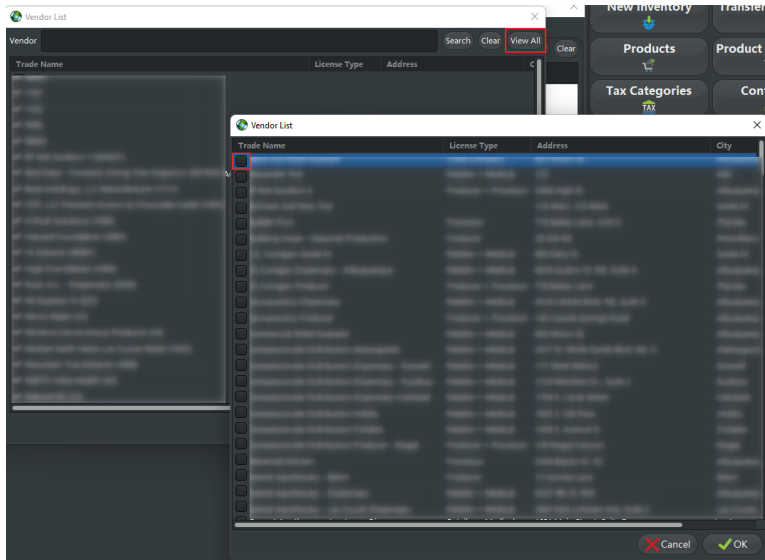
Vendors are other licensees with an active license from the State. The BioTrack Commercial system works off a Preferred Vendor List. To view your preferred vendors, click the **Vendors** shortcut on the right-hand side and then the "Preferred Vendor List" button.



The *Vendor List* window that opens will be your list, including vendors selected by you to send manifests to and/or vendors who have sent transfers to you.



You can deselect them by unchecking the box next to the name to remove, or by clicking "View All" you can see all approved and active licensees in your state to choose from.



[Important Note](#): Please do NOT manually enter any Marijuana Licensee.

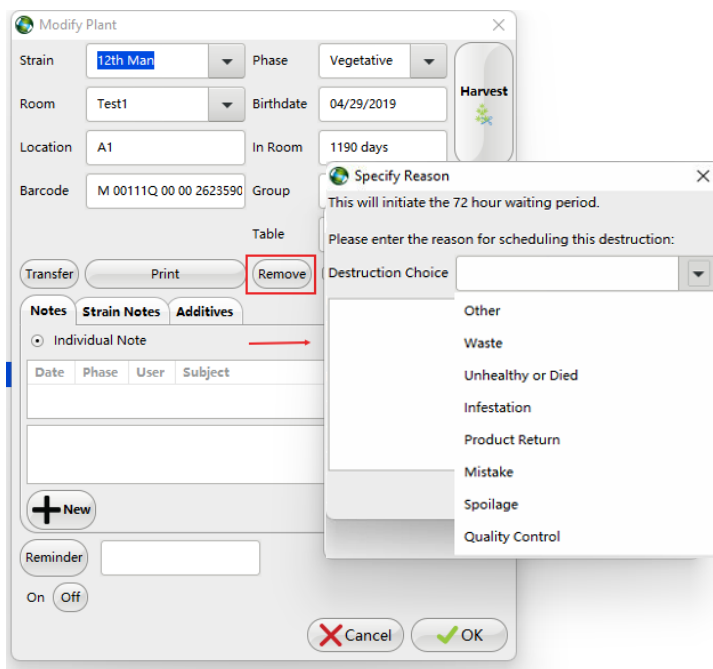
**Title:** Destroying Plant Inventory

**Summary:** How to set one plant or multiple plants destruction

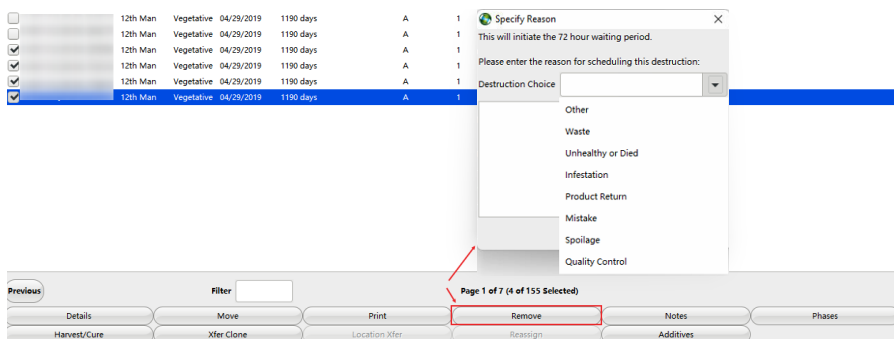
**Tags:** Plant, Plants, Destroy, Destruction, Undo, Cultivation, Growhouse, Commercial

From the **Growhouse** tab in BioTrack, you can select plants to set for destruction.

You can also set a plant for destruction from the *Modify Plant* window by clicking the “Remove” button. You will be required to select a Destruction Choice from the drop down and enter a reason for the destruction. This method can only be used for one plant at a time versus many.



To set multiple plants for destruction, select the plants you need to schedule for destruction from the **Growhouse** tab and then click “Remove” at the bottom of the screen. The *Specify Reason* window will appear where you can use the drop down to select the Destruction Choice and enter a reason for destruction.

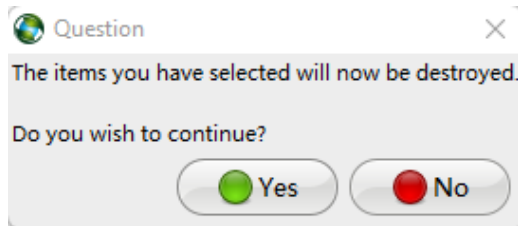




There will be a hold time in your BioTrack system. You'll see the plants are scheduled for destruction (shown below).



After that hold time, you can come back into the system and select the plant(s) to permanently remove from the system.



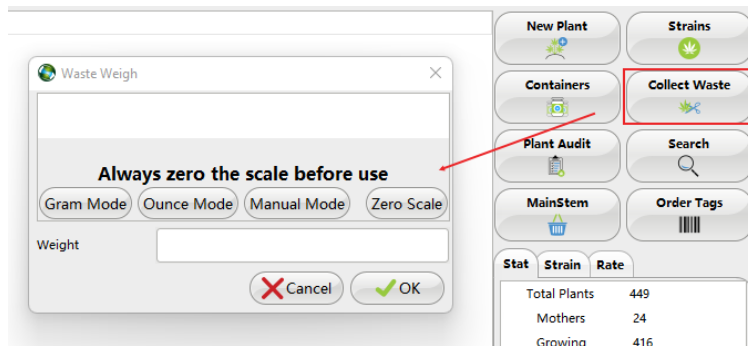
[Important Note](#): You can undo a destruction notification from the **Growhouse** menu → **Undo** → **Undo Destruction Notification**.

**Title:** Collecting Waste

**Summary:** How to collect waste and schedule for destruction

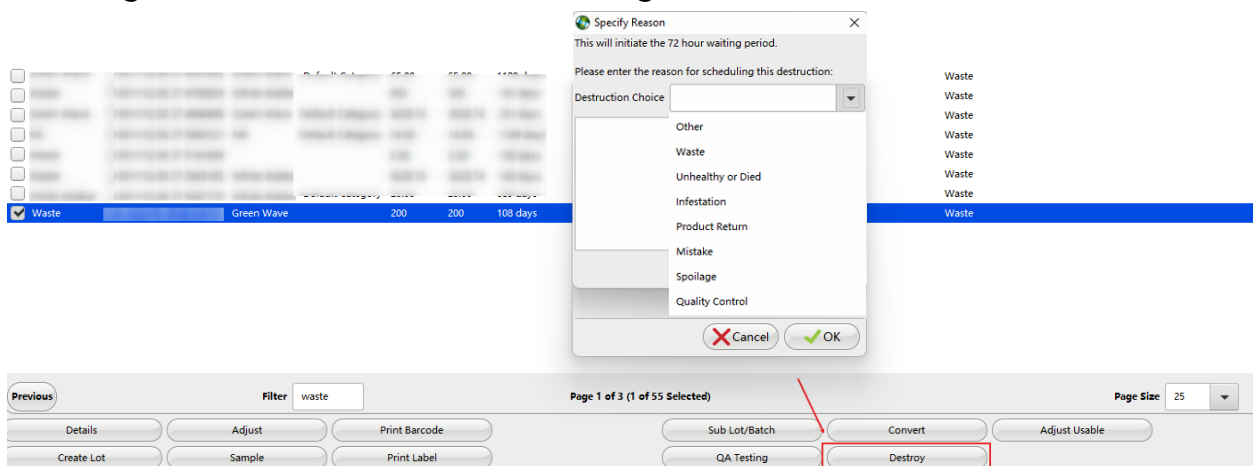
**Tags:** Waste, Collect Waste, Destroy, Destruction, Undo, Cultivation, Growhouse, Commercial

Should you need to record any waste collected outside of the Harvest/Cure process, from the **Growhouse** tab, simply select the **Collect Waste** shortcut from the right-hand side of the screen.



The *Waste Weigh* window will pop up. When you enter in the Weight of waste and click “OK,” this will generate a barcode listed as “Waste” in your Bulk Inventory room.

Once the waste is in your inventory, you can select the item by checking the box to the left of it, clicking the “Destroy” button, and scheduling for destruction after choosing a Destruction Choice and entering a reason for destruction.



There will be a hold time in your BioTrack system, but once your hold time is over, you'll select the waste item again, click “Destroy,” and the item will be permanently removed from your inventory.

[Important Note](#): You can undo a destruction notification from the **Inventory** menu → **Undo** → **Undo Destruction Notification**.

## Title: Generating Sub Lots

**Summary:** What is a sub lot, when to sub lot and how to generate a sub lot

**Tags:** Sub lot, Sub lots, Sub lotting, Sublot, Sublots, Sublotting, Batch, Batches, Commercial

Sub lotting items in BioTrack allows you to “break up” Batches in your system.

For example, if you have 100 grams or 100 units of an item and would like to send a partial amount to another room or you would like to sell or return a specific amount, you would utilize the sub lot feature.

Start by selecting the item (check the box to the left of the item) and then click the “Sub Lot/Batch” button at the bottom of the screen. The *Create Sub-Lot/Sub-Batch* window will appear. From there you can enter the desired Amount to Deduct from the Parent Batch.

The screenshot displays the BioTrack interface. On the left, a list of items is shown with checkboxes. The main area contains a table of items with columns for Name, Default Category, Quantity, and various attributes. A modal window titled "Marijuana Extract for Inhalation Sub-Batch Creation Tool" is open, showing a barcode, an "Amount to Deduct" field with the value 10, and a "Quantity Available" of 89.00. The bottom navigation bar includes buttons for "Sub Lot/Batch", "Convert", "Adjust Usable", "QA Testing", and "Destroy". A red box highlights the "Sub Lot/Batch" button, and a red arrow points from the "Sub Lot/Batch" button in the modal to the "Sub Lot/Batch" button in the bottom bar.

**Important Note:** There is no Undo action when you sub lot. If done incorrectly, you will have to adjust the parent lot up and adjust the sub lotted amount down to 0.

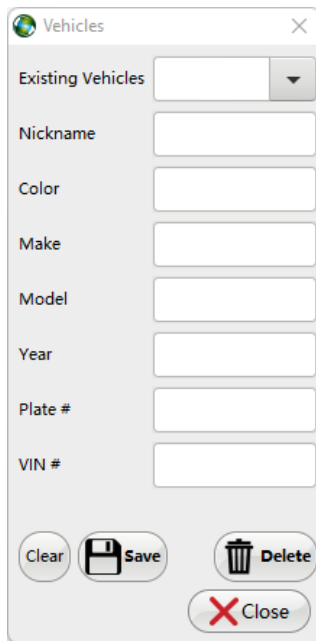
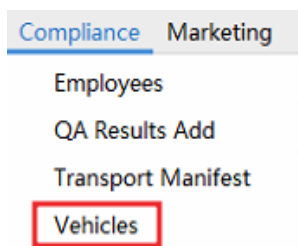
**Title:** Adding Vehicles and Creating Drivers (Employees) for Transfers

**Summary:** How to set up vehicles and drivers to perform transfers

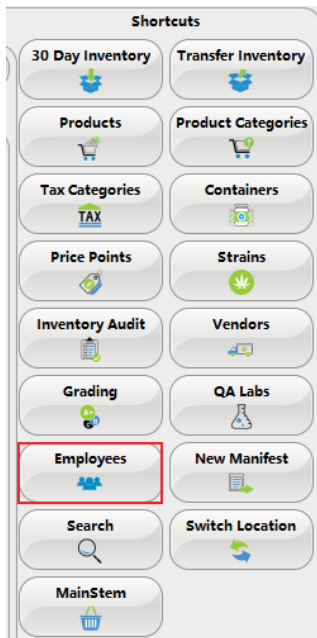
**Tags:** Vehicle, Vehicles, Driver, Drivers, Employees, Transfer, Transfers, Commercial

To perform a transfer, you will need to have your vehicle(s) and driver(s) set up in your BioTrack Commercial system.

To add a vehicle, go to the **Compliance** menu → **Vehicles**. From here you can Add, Modify, or Delete a vehicle. All vehicles added into the system will be available for selection on your manifests.

A screenshot of a 'Vehicles' form window. The window has a title bar with a globe icon and the text 'Vehicles'. Below the title bar is a dropdown menu labeled 'Existing Vehicles'. The form contains several text input fields: 'Nickname', 'Color', 'Make', 'Model', 'Year', 'Plate #', and 'VIN #'. At the bottom of the form are four buttons: 'Clear', 'Save' (with a floppy disk icon), 'Delete' (with a trash can icon), and 'Close' (with a red 'X' icon).

There are two options to add Employees to your system. You can access from the **Compliance** menu → **Employees**, or by selecting **Employees** from the right-hand side under Shortcuts.



From there, you can Add, Modify, or Delete an employee. All employees added will be available for selection on your manifests.

A screenshot of a form titled "Employees" with a close button (X) in the top right corner. The form contains the following fields: "Existing Employees" (a dropdown menu), "Name" (a text input field), "Employee ID" (a text input field), "Birthdate (MM/DD/YYYY)" (three separate input fields for month, day, and year), and "Hire Date" (a text input field). At the bottom of the form, there are five buttons: "Clear", "Save" (with a floppy disk icon), "Delete" (with a trash can icon), and "Close" (with a red X icon).

**Important Note:** For compliance purposes, be sure all fields are filled in correctly.

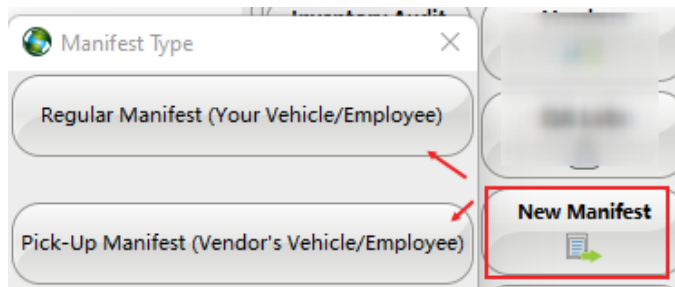
**Title:** Creating a Manifest

**Summary:** How to determine which manifest type to use and the steps to create a manifest

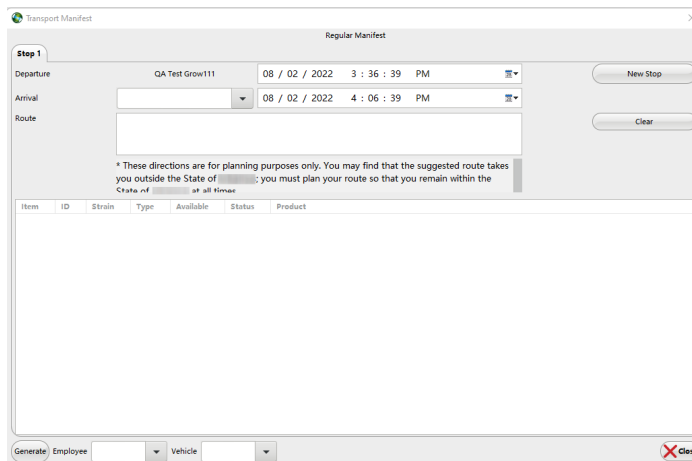
**Tags:** Manifest, New Manifest, Regular Manifest, Pick-Up Manifest, Pick Up Manifest, Vehicle, Driver, Commercial

From the **Inventory** tab, select **New Manifest** on the right-hand side under Shortcuts. This will bring up the *Manifest Type* window with two options: Regular Manifest and Pick-Up Manifest.

You will choose Regular Manifest if you are driving or Pick-Up Manifest if the vendor is picking it up from your facility.



Both the Regular and Pick-Up Manifest creation look basically the same. The difference is adding your driver and vehicle that you have on file versus adding the vendor vehicle and driver.

A screenshot of a software window titled "Transport Manifest" with a sub-header "Regular Manifest". The window is divided into sections. The top section, labeled "Step 1", contains fields for "Departure" (QA Test Grow111, 08 / 02 / 2022, 3 : 36 : 39 PM) and "Arrival" (08 / 02 / 2022, 4 : 06 : 39 PM). There are "New Stop" and "Clear" buttons. Below this is a "Route" field with a warning message: "These directions are for planning purposes only. You may find that the suggested route takes you outside the State of [blank] - you must plan your route so that you remain within the State of [blank] at all times." At the bottom, there is a table with columns: Item, ID, Strain, Type, Available, Status, Product. Below the table are "Generate", "Employee" (dropdown), "Vehicle" (dropdown), and "Close" buttons.

Transport Manifest

Pick-Up Manifest

Step 1

Departure: QA Test Grow111 08 / 02 / 2022 3 : 37 : 31 PM

Arrival: 08 / 02 / 2022 4 : 07 : 31 PM

Route: [Empty field]

\* These directions are for planning purposes only. You may find that the suggested route takes you outside the State of [State]; you must plan your route so that you remain within the State of [State] at all times.

Item	ID	Strain	Type	Available	Status	Product
[Empty table]						


Generate Employee: [Dropdown] Vehicle: [Dropdown]

Add Vendor Employee Add Vendor Vehicle

As long as the vendor has been added to your Preferred Vendor List and the product is ready, you can then select the items to add to the manifest. Be sure to enter the correct Departure Date/Time and approximate Arrival Date/Time. Your Travel Route is the turn-by-turn directions from your location to the destination.

The following is an example of a manifest.

Marijuana Transportation Manifest Page 1 of 1

Date:	08/01/2022	License #:	00111Q	Barcode
Licensee Name:	QA Test Grow111	Vehicle ID #:	1234567898765432	 00111Q0000001245
Licensee Address:	333 main st. 67005	Vehicle Color / Make / Model / License Plate:	2018 Gray Dodge Ram Gohogs	
Licensee Phone:	5010000000	Transporter Name:	Tom Jones 1	
Transporter ID:	111222120	Transporter Date of Birth:	01/02/1970	
Transporter Signature:				

Stop #1 of 1 (1 Items)

Destination License Name:	QA Test retail 111	Approx. Departure Date/Time:	08/01/2022 3:38 PM
Destination License #:	00111F	Approx. Arrival Date/Time:	08/01/2022 4:08 PM
Destination License Address:	333 main st		
Destination Licensee Phone:	5010000000		

Travel Route:

See GPS

Instructions: If the quantity received is less than the quantity shipped, check the box in the appropriate field below and indicate the actual quantity received.

Stop 1, Items 1-1 of 1 Manifest ID 00111Q0000001245

#	Batch / Lot ID	Item Description	Shipped	Received
1		Flower Lot	150.00 g	<input type="checkbox"/>
2				
3				

From your **Inventory** tab → **Manifests** tab, you can see all “Shipped” and “Quarantined” manifests. Items that are Quarantined can be found in your Quarantine Room.

Growhouse Inventory Reports Timeclock Messages

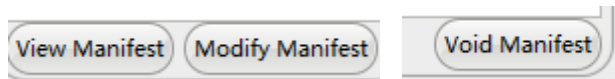
Current Dispensed Sales Transfers Accounts Payouts Manifests Quality Assurance

Start: 08/01/2022 End: 08/01/2022 Refresh

File Time	Departure Time	Manifest ID	Stops	Item Count	Status	Manifest Type	Destination
08/01/2022 10:10 AM	08/01/2022 10:39 AM	0011 1Q00 0000 1244	1	1	Shipped	Regular Manifest	
08/01/2022 3:08 PM	08/01/2022 3:38 PM	0011 1Q00 0000 1245	1	1	Quarantined	Regular Manifest	QA Test retail 111



There are a few additional actions you can perform from the **Manifests** tab.



View Manifest = Print, reprint or view the manifest

Modify Manifest = Modify the Driver on the manifest.

Void Manifest = If the manifest is in “Quarantined” status, you can void the manifest. This will release your items and void the manifest totally. Items will be sent back to your Bulk Inventory room.

*Important Note*: Any manifest with the status of “Shipped” cannot be voided.

Video: [Creating a Manifest](#)

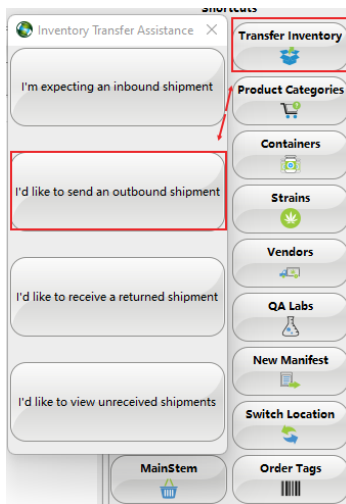
**Title:** Transferring a Manifest

**Summary:** How to transfer your manifest, void a manifest and void a transfer

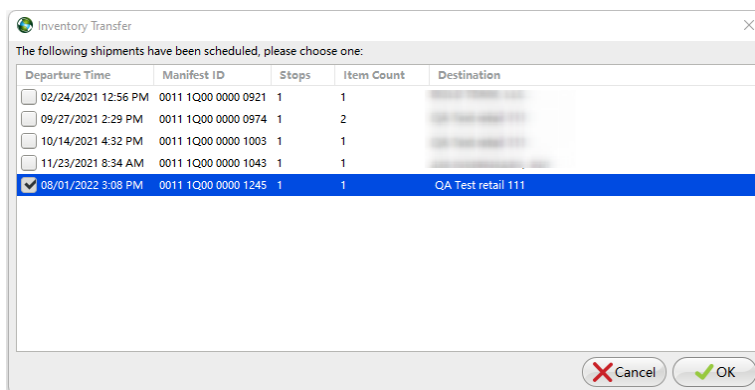
**Tags:** Transfer Inventory, Transfer Manifest, Transfers, Outbound Shipment, Commercial

Now that you have created your manifest, you will need to move forward with the transfer.

To transfer your manifest, select **Transfer Inventory** from the Shortcuts on the right-hand side of your **Inventory** tab. Once the *Inventory Transfer Assistance* window appears, you will select “I’d like to send an outbound shipment.”



The *Inventory Transfer* window will appear allowing you to select the manifest you’d like to ship out. After making your selection, click “OK” to be taken to the screen which will allow you to enter the price per line item.



The price entered is the overall cost. For example, 100 Prepacks sold for \$500. You will do this for EVERY line item on the manifest.

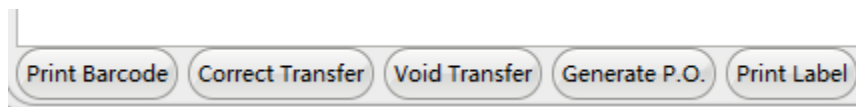
Important Note: All internal transfers have a \$0.00 Sale Price.

Once the transfer is completed, you'll be able to find it on the **Inventory** tab → **Transfers** tab.

Time	Product Name	Strain	Direction	User	Quantity	Vendor	Price	Transfer	Batch #	Receipt #
<input checked="" type="checkbox"/> 08/01/2022 3:12 PM	Green Wave	Green Wave	Outbound	anelson	150.00 g	QA Test retail 111	0.00	Full		
<input type="checkbox"/> 08/01/2022 10:10 AM	Green Wave	Green Wave	Outbound	anelson	3175.15 g		1.00	Full		79

If you need to void a manifest that has been shipped, first you will need to void the transfer. To do so, click “Refresh” to change status from “Shipped” to “Quarantined.” If the shipment has already been accepted by the vendor you will NOT be able to void the Transfer and the vendor will need to ship the items back to you.

There are a few additional actions you can perform from the **Transfers** tab.



Print Barcode = Reprint a line item's inventory barcode

Correct Transfer = Correct a line item price (not overall price)

Void Transfer = Void a transfer which will send the items back to the Manifest tab listed with a status of “Quarantined” after refreshing.

Generate P.O. = Generate your invoice showing the items sent, quantities, cost per unit, and total cost.

Print Label = Reprint the inventory label

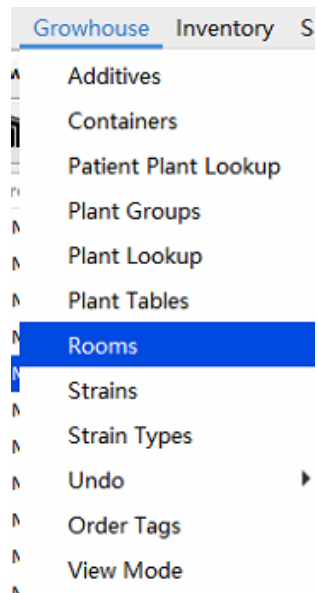
Video: [Transferring a Manifest](#)

**Title:** Creating Growhouse Rooms

**Summary:** How to create, modify and delete rooms for the Growhouse

**Tags:** Rooms, Room, Cultivation, Growhouse, Commercial

You can create a Growhouse room from the **Growhouse** menu → **Rooms**.



From the *Rooms* window you can Add, Modify or Delete a room. Rooms can be created and named however you choose. Please see some common examples below.

- Veg
- Flower 1
- Dry/Cure
- Tent
- Greenhouse 1
- Hoop House 1
- Field
- Outdoor 1

**Important Note:** Before deleting a room, be sure there are no plants in the room.

Rooms can also be set to match the corresponding plant phase. For example, the Veg room can be set to Vegetative Phase. If you move a plant from a room where the Phase is set to Seedling into the Veg room, the phase of the plants will change for you. This field is optional.

Rooms ×

Existing Rooms

Name

Phase

Germination

Seedling

Vegetative

Pre-Flowering

Flowering

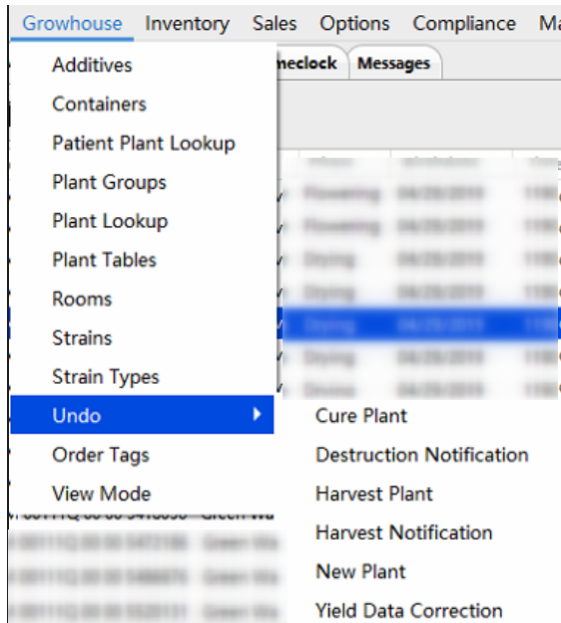
Harvesting

**Title:** Undo Actions for Cultivation

**Summary:** Explanation of the various undo actions available for Cultivation

**Tags:** Undo, Undo Actions, Cultivation, Growhouse, Commercial

For some actions made by mistake, or incorrectly executed, you may have the ability to undo that action. To access these options, go to the **Growhouse** menu → **Undo**.



Undo Cure Plant = If you've entered an incorrect dry weight, or entered dry weights on the wrong plants you can undo the cure.

*Important Note:* You can only undo the cure if the inventory has NOT been modified.

Undo Destruction Notification = If you set a plant or plants for destruction and it was done incorrectly you can undo the notification, releasing the plant(s).

Undo Harvest Plant = If you harvested your plant(s) and the weight or plant(s) were wrong, you can undo this action.

Undo Harvest Notification = If you have set the incorrect plant(s) for harvest, you can undo the notification, assuming you haven't gone through the harvest process.

Undo New Plant = If you have sourced a plant or cloned from a Mother plant, you can undo this action.

Undo Yield Data Correction = If undo Cure Plant is not an option, and your dry weights were wrong, you can select this option to enter the correct weight.

*Troubleshooting:* If any of these undo options do not work, it means you either waited too long (about 14 days), made too many modifications, or the action is blocked and you will need approval from the State. Once you receive State approval, please send it to BioTrack for correction.

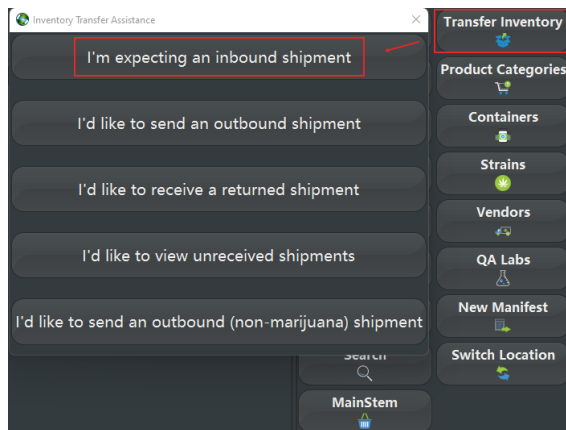


**Title:** Accepting Inbound Transfers

**Summary:** How to accept inbound transfers into inventory

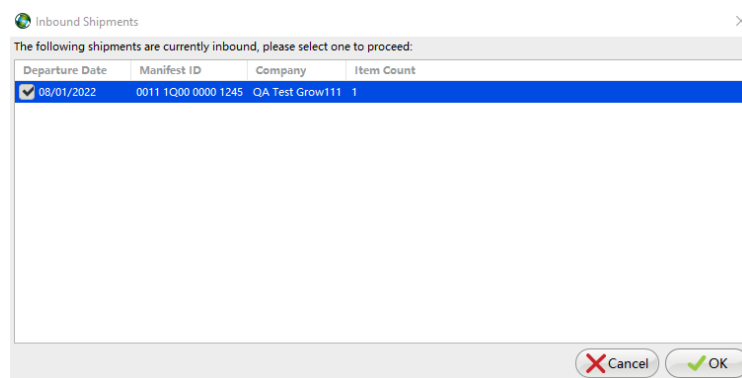
**Tags:** Transfer Inventory, Inbound Transfer, Inbound Transfers, Transfers, Transferring, Inbound Shipment, Commercial

To receive an inbound transfer, you will need to click on the **Transfer Inventory** shortcut on the right-hand side of the screen then select “I’m expecting an inbound shipment” from the *Inventory Transfer Assistance* window.



This will open the *Inbound Shipments* window showing all inbound shipments you can accept into your inventory.

First, select the correct shipment by checking the box to the left and clicking “OK.”



This will open the transfer displaying ALL the items contained within it. From here, you can accept or reject them. You will need to do this one line item at a time. We recommend you start from the top and work your way down.

1. The first item on the inbound transfer
2. Enter the Quantity you are accepting in. You can reject all by entering 0 or reject a partial amount.

3. Select your New Product name from the dropdown, or simply type in this field.
4. How much you Paid for that line item
5. Click “Save Item.” If line items are not selected, they will not come into inventory and will be rejected.
6. You can Generate Purchase Order by checking the box to the left.
7. When you are finished, select “OK” to accept the inventory.

The screenshot shows a software window titled "Inventory Transfer" with a sub-header "QA Test Grow111". It contains a table with the following data:

No.	ID	Strain	Product	Description	Qty	Cost	QA Status	Inventory Type
1		Green Wave	Flower Lot	Flower Lot	150.00	0.00	Passed QA	Flower Lot

Below the table is a form with the following fields and controls:

- Buttons: "Previous Item", "Save Item" (with a red circle 5), "View QA Results"
- Barcode ID: [Redacted]
- Strain: Green Wave
- Product: Flower Lot
- Inventory Type: Flower Lot
- Description: Flower Lot
- Usable: [Empty]
- Quantity: 150.00 (with a red circle 2)
- Cost: 0.00
- Options: New Product (with a red circle 3), Flower Lot
- Subtotal: [Empty]
- Tax: [Empty]
- Total: [Empty]
- Method: [Empty]
- Paid: [Empty] (with a red circle 4)
- Checkbox: "Generate Purchase Order" (with a red circle 6)
- Buttons: "Cancel" (with a red circle 7), "OK"

## Title: Creating New Plants

**Summary:** How to create a new plant via Source ID or Mother ID, The purpose of a Mother Plant

**Tags:** New Plant, New Plants, Source ID, Mother ID, Mother Plant, New Inventory, Commercial

Assuming you have taken in plants/seeds during your window, these plants will be located in your inventory. To get them into your Growhouse, select **New Plant** on the right-hand side under Shortcuts and then select "Source ID" to source from your inventory or "Mother ID" to clone from another plant (it does not need to be a Mother Plant to clone).

The screenshot shows the 'New Plant' dialog box with the following fields and options:

- Source: Clone
- Strain: (empty)
- Quantity: 1
- Group: No Group
- Birthdate: 08/02/2022
- Room: Clone Room
- Table: (empty)
- Mother ID: (empty)
- Source ID: (empty)
- Mother Plant
- Print Barcode
- Buttons: Cancel, OK

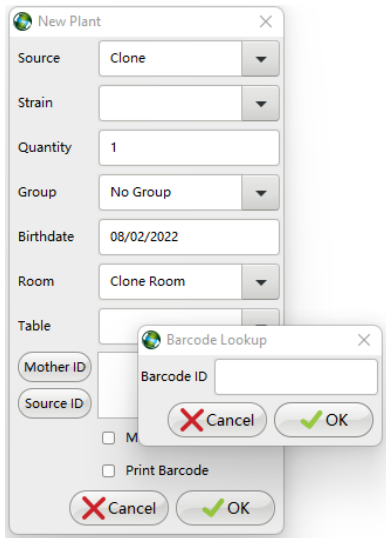
On the right side, there is a sidebar with buttons: New Plant, Containers, Plant Audit, MainStem, and a table with columns Stat, Strain, and Rate. Below the table are categories: Total Plants, Mothers, Growing, Drying, Germination, Seedling, and Vegetative.

- Select "Source ID," and this will display all of your eligible inventory within your Inventory tab, meaning all the clones, seeds, and mature plants you either created via the inventory window or received via an inbound transfer.

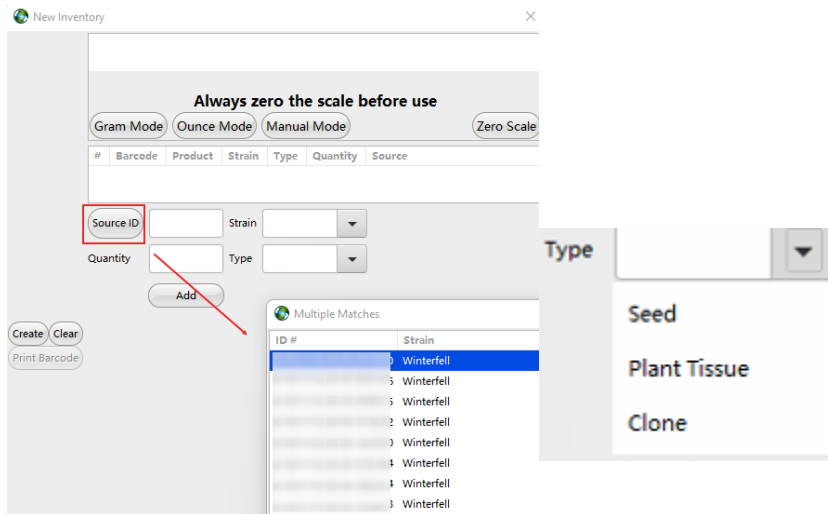
The screenshot shows the 'New Plant' dialog box with the 'Source ID' field selected. A 'Multiple Matches' table is overlaid on the right, showing a list of plants with columns for ID #, Remaining, Strain, and Type. The first row is highlighted in blue.

ID #	Remaining	Strain	Type
1	1	Green Wave	Clone
	150	White Walker	Mature Plant
	25	White Walker	Mature Plant

- Select “Mother ID,” and this will allow you to scan, manually enter, or paste in another plant’s Barcode ID. This will track throughout the system showing that you cloned from another plant.
- You can check Mother Plant here or later from the Modify Plant screen.



If a plant is selected as a Mother, go to **New Inventory** and click the “Source ID” button. This will pull up every plant designated as a Mother allowing you to choose Seed, Plant Tissue, or Clone. These will be brought into your inventory.



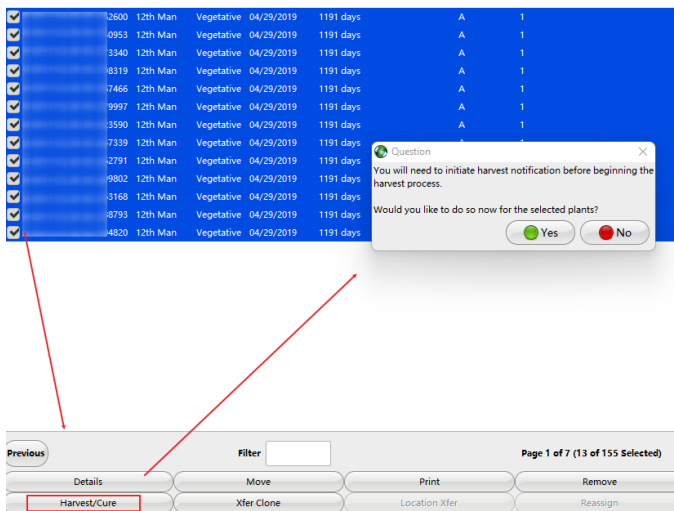
**Title:** Harvesting Plants

**Summary:** How to harvest plants

**Tags:** Harvest, Harvesting, Harvest Cure, Flower Wet Weight, Other Material, Waste, Commercial

When it's time to harvest your plant(s), you'll need to select the plants of the same strain and initiate the harvest.

- From the **Growhouse** tab, select the plants you'd like to harvest by checking the boxes to the left.
- Click the "Harvest/Cure" button at the bottom of the screen. This will ask you if you want to initiate the Harvest process. Select "Yes."



The *Harvest Plant* window will appear.

1. Click inside the Flower Wet Weight field and enter in the total wet weight for ALL plants selected.
  - a. Click "Next" to move to the next field. The numbers from above will transfer down, but now you can enter the applicable weight in the next field.
2. If applicable, enter the Other Material weight.
  - a. Any Other Material collected at this time will be sent to your inventory. Click "Next."
3. If applicable, enter the Waste weight.
4. You can select a New Room for the drying plants.
5. You can place drying plants on a New Table (optional).
6. You can place drying plants in a New Group or create a new group (optional).
7. The Next button will change to "Finish," indicating you're done.

Harvest Plant

**Always zero the scale before use**

Gram Mode
  Ounce Mode
  Manual Mode

Strain: 
 New Room:

Flower Wet Weight: 
 New Table:

Other Material:

Waste:

New Group:

Container:

#	Barcode	Strain
<input checked="" type="checkbox"/> 1	2600	12th Man
<input checked="" type="checkbox"/> 2	4820	12th Man
<input checked="" type="checkbox"/> 3	3168	12th Man
<input checked="" type="checkbox"/> 4	9802	12th Man

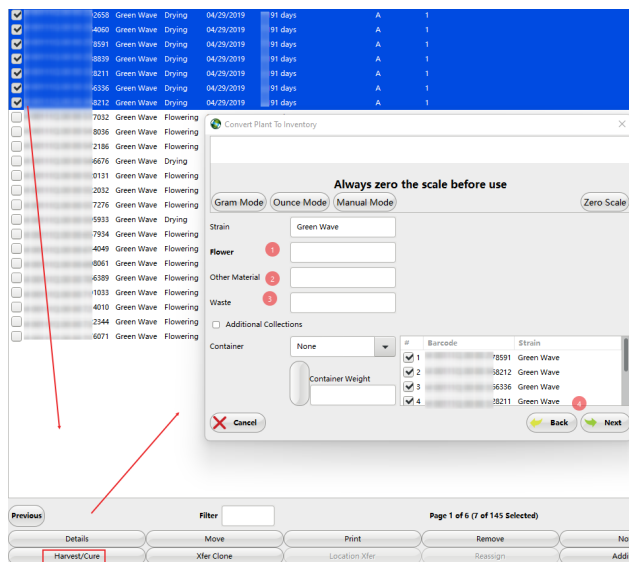
**Title:** Curing Plants

**Summary:** When and how to cure plants

**Tags:** Cure, Curing, Harvest Cure, Dry Flower Weight, Other Material, Waste, Commercial

For plants that have been harvested and set into the “Drying” phase, when it's time to enter the dry weight and batch into your inventory you can select the plants by strain and click the “Harvest/Cure” button at the bottom of the **Growhouse** tab. This will bring you to the *Convert Plant To Inventory* window.

1. Click inside of the Flower field and enter the total dry flower weight for ALL plants selected.
  - a. Click “Next” to move to the next field. The numbers from above will transfer down, but now you can enter the applicable weight in the next field.
2. Enter any Other Material weight. Any Other Material collected at this time will be sent to your inventory.
  - a. Click “Next.”
3. Enter any Waste weight.
4. The Next button will change to “Finish,” indicating you’re done.



The plants will be removed from your Growhouse and sent to your inventory with an inventory Barcode/Batch ID. You will now see inventory IDs for Flower, Other Material, and Waste.

**Important Note:** Flower and Other Material will be turned into Lots for Converting/Testing.

[Important Note](#): Waste will need to be marked for destruction. Follow the instructions in the “*Collecting Waste*” article.

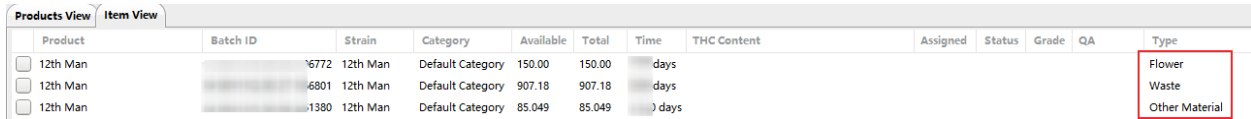


## Title: Creating a Lot

**Summary:** When to create a lot, Inventory types used to create different lot types

**Tags:** Lot, Lots, Create Lot, Flower Lot, Other Material Lot, Batches, Commercial

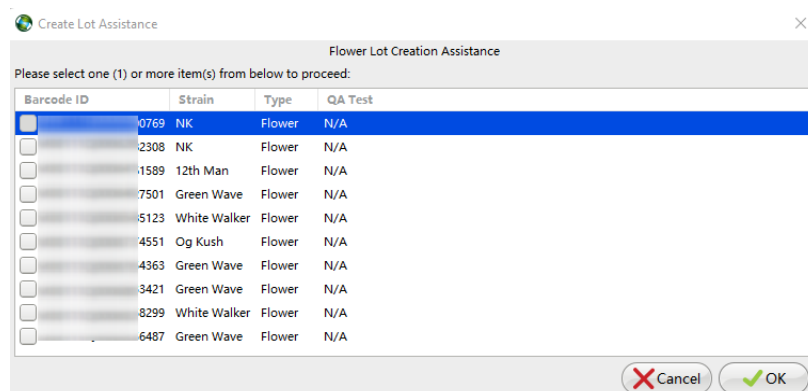
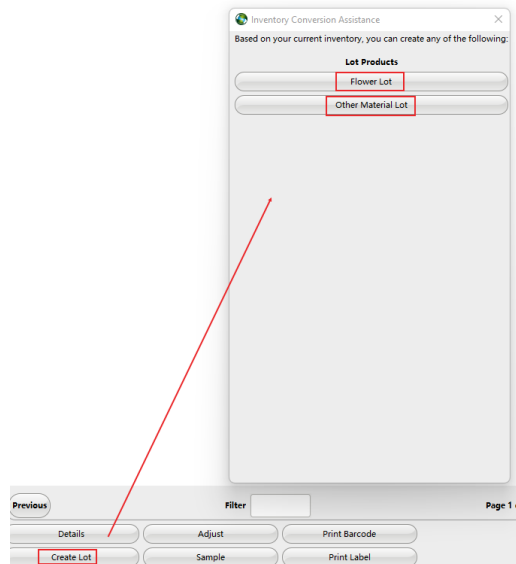
Creating a lot is something you will need to do after the cure process. At this point you will have “Flower,” “Other Material,” and possibly “Waste.”



Product	Batch ID	Strain	Category	Available	Total	Time	THC Content	Assigned	Status	Grade	QA	Type
<input type="checkbox"/> 12th Man	6772	12th Man	Default Category	150.00	150.00	days						Flower
<input type="checkbox"/> 12th Man	6801	12th Man	Default Category	907.18	907.18	days						Waste
<input type="checkbox"/> 12th Man	1380	12th Man	Default Category	85.049	85.049	days						Other Material

There isn't anything you can do with Waste; that type of inventory is used for reporting purposes only so the State can see how much waste your location(s) have generated.

As for Flower and Other Material, you won't be able to do much with it unless you convert (“Create Lot”) and turn it into a Flower Lot and Other Material Lot, respectively.



You can use multiple “Flower” batches to create a single Flower Lot as long as it's all the same strain.

Likewise, you can use multiple “Other Material” batches to create a single Other Material Lot as long as it's all the same strain.

Depending on the amount, your maximum lot size has to do with your regulations and lab sample. You can select multiple “Flower” IDs to make up to the maximum lot size to pull QA samples from. Enter the amount you need to be a Flower/Other Material Lot into the Amount to Deduct field.

Create Flower Lot

Flower Lot Creation Tool

Barcode ID: [redacted] 4551 (Flower)

Amount to Deduct: 13607.77

Quantity Available: 13607.77

Total Lot Quantity (Calculated Above): 13607.77

Cancel OK

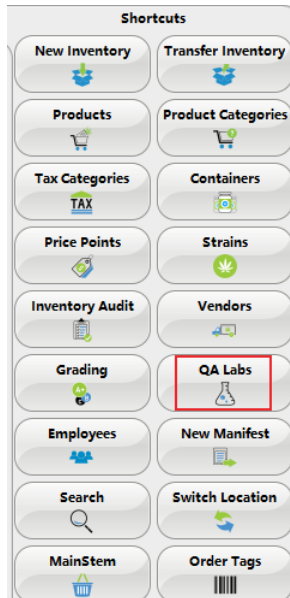
**Video: Creating a Lot**

**Title:** Pulling QA Samples

**Summary:** How to pull QA samples correctly

**Tags:** Sample, Samples, QA, Testing, Test, Lab, Labs, Results, Quality Assurance, Commercial

QA testing is the process of taking samples from a lot to send to a lab for testing. You'll want to make sure the QA Lab is on file with the correct information.



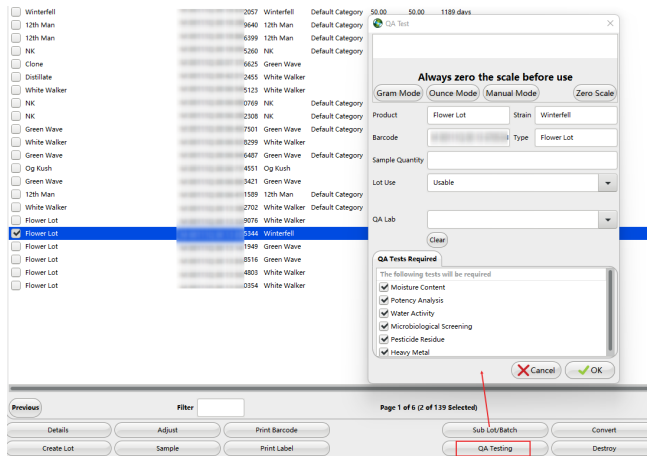
A screenshot of a software application window titled "Labs". The window contains a form for entering lab information. At the top, there is a dropdown menu labeled "Existing Labs". Below this are several input fields: "Name", "Address 1", "Address 2", "City", "State", "Zip", "Phone", "Fax", "Email", "Website", "License Number", and "Contact". A "Notes" section is located below the input fields, featuring a large text area. At the bottom of the form, there are four buttons: "New" (with a plus sign icon), "Save" (with a floppy disk icon), "Delete" (with a trash can icon), and "Close" (with a red X icon).

**Important Note:** Labs are different from Vendors. You will manually enter the QA Lab information. If you are unsure if you have the correct information, you can call BioTrack.

- First, select the item you want to test. (**Note:** Other Material Lots cannot be tested. These can be manifested and transferred without QA results and that is

because they're intended for processors who will convert to intermediate products and test them.)

- After selecting the item, click the "QA Testing" button at the bottom of the screen.
- The QA Test window will appear where you will enter the Sample Quantity.
- Choose your QA Lab from the dropdown.
- Click "OK."



This will create a new inventory item, your QA Sample, and the original lot will get a Status of "Pending QA."

The sample information can be found under the **Inventory** tab → **Quality Assurance** tab. From there, you will have the option to "Retrieve Results" once the lab enters them, or if you feel you made a mistake you have the option to "Void Sample." (*Note:* Void Sample ONLY works if the sample you are attempting to void has not been manifested/transferred to the lab. In that case the transfer and manifest would have to be voided first.)

Growhouse											
Inventory											
Reports											
Timeclock											
Messages											
Current											
Dispensed											
Sales											
Transfers											
Accounts											
Payouts											
Manifests											
Quality Assurance											
Start: 08/02/2022		End: 08/02/2022		Refresh							
QA Lab	Sample Time	Sample ID	Barcode ID	Strain	Product Type	Product Name	Status	Total THC	Total CBD	CBDA	
	08/02/2022 1:39 PM	20865		5344 Winterfell	Flower Lot	Flower Lot	Pending QA	0.0	0.0	0.0	

The status of the sample will be shown as "Pending QA." Once the lab enters the results and you retrieve them, depending on the results, it will change to either "Passed QA" or "Failed QA."

**Important Note:** Always create QA samples PRIOR to sub lots so your results carry through to other sub lots.

**Title:** Converting Inventory

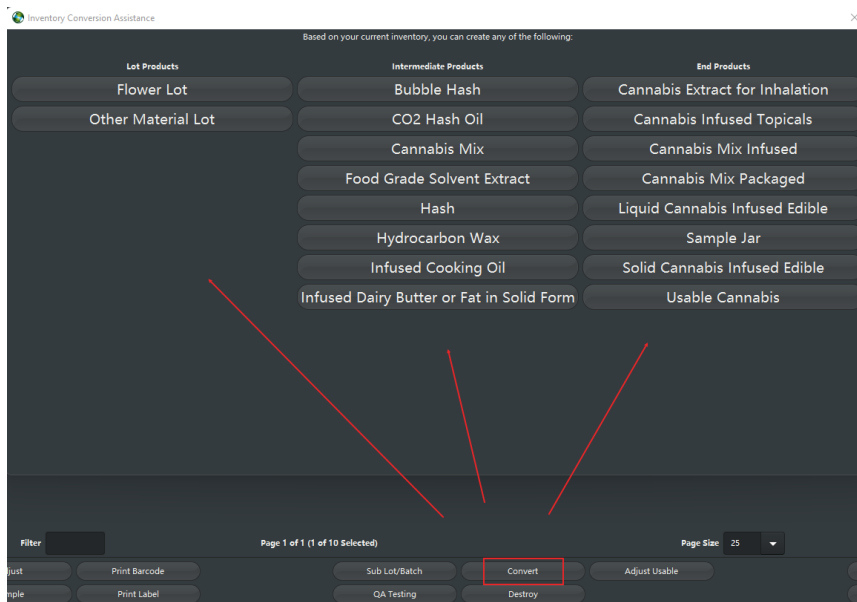
**Summary:** How to convert inventory, What conversions are permissible

**Tags:** Convert, Converting, Conversions, Inventory, Product, Products, Intermediate, Commercial

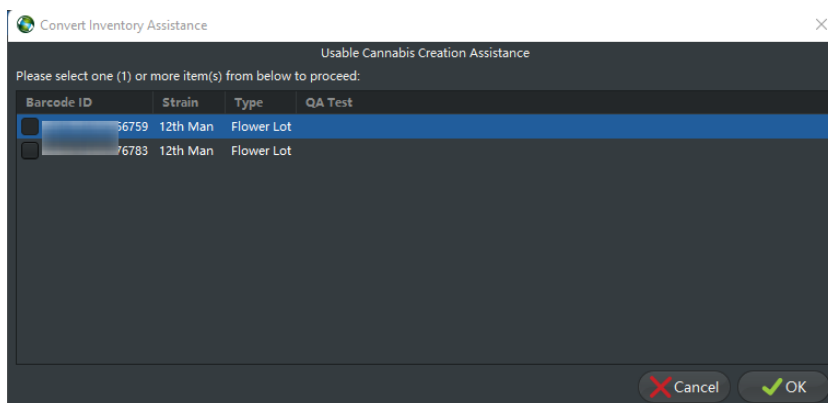
When converting, you have your beginning Lot products, Intermediate products, and End products.

You can convert beginning Lot to Intermediate, and in some cases beginning Lot to End (e.g. in the case of Flower Lot to Usable Cannabis).

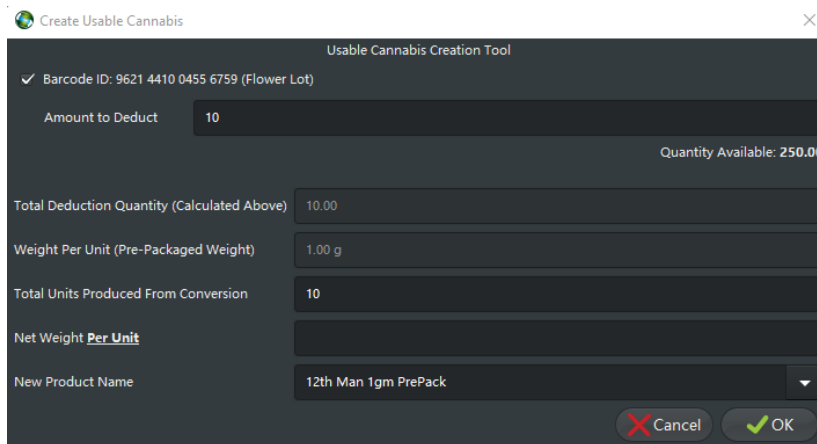
Once you select “Convert” at the bottom of the screen, you can then choose the beginning Lot product you want to use. In this example, we are using Flower Lot and converting it to the End product of Usable Cannabis.



It will then show you all available items for use in the conversion. You can use multiple lots in any conversion.



You will then enter the amount you want to use from the Flower Lot(s) into the Amount to Deduct field, and how many packages you made in the Total Units Produced From Conversion field. That will calculate your usable (how much in that package) which will be displayed in the Weight Per Unit (Pre-Packaged Weight) field. If you have made this item before you can select the name from the New Product Name drop down, or you can simply type in that field. This will create the new item and it will be placed in your inventory.



The screenshot shows a software window titled "Usable Cannabis Creation Tool" with a close button (X) in the top right corner. The window contains the following fields and information:

- Barcode ID: 9621 4410 0455 6759 (Flower Lot) with a checkmark icon.
- Amount to Deduct: 10
- Quantity Available: 250.00
- Total Deduction Quantity (Calculated Above): 10.00
- Weight Per Unit (Pre-Packaged Weight): 1.00 g
- Total Units Produced From Conversion: 10
- Net Weight Per Unit: (empty field)
- New Product Name: 12th Man 1gm PrePack (dropdown menu)
- Buttons: Cancel (with a red X icon) and OK (with a green checkmark icon).

Inventory types are dictated by the conversion. Once an item is created using the "Convert" action, you cannot change the inventory type. You will either have to undo the conversion or use the adjustment feature.

**Important Note:** All conversions should be done AFTER QA samples have been pulled and manifested to the lab.

**Video: Converting Inventory**

**Title:** Making Inventory Adjustments

**Summary:** When inventory adjustments may be needed, How to make an inventory adjustment

**Tags:** Inventory, Adjustment, Adjustments, Adjust, Commercial

Adjustments to inventory in your system may become necessary if you have made a mistake, have moisture loss, or have been directed by the State to make one.

All adjustments require an Adjustment Type and Adjustment Reason. This is also permission-based and will ask for your PIN twice before you can proceed.

You can adjust an item back into your system, adjust the weight up, adjust the weight down, or adjust the item out.

Select the item in question to bring up the *Inventory Adjust* window. Enter in the New Weight or New Quantity (each), depending on the product you are adjusting, select the Adjustment Type, and lastly add your Adjustment Reason.

The screenshot shows the 'Inventory Adjust' window with the following fields and options:

- Always zero the scale before use** (header)
- Mode buttons: **Gram Mode**, **Ounce Mode**, **Manual Mode**, **Zero Scale**
- Product:** Flower Lot
- Barcode:** 6759
- Current Weight:** 250.00 g
- New Weight:** (empty field)
- Difference:** (empty field)
- Adjustment Type:** (dropdown menu open)
- Container:** None
- Container Weight:** (empty field)
- Adjustment Reason:** (empty field)
- Adjustment Type dropdown options:** Inventory Audit, Theft, Seizure by Federal, State, Local or Tribal Law Enforcement, Mistake, Moisture Loss, Disposal, Wastage
- Buttons:** Cancel (red X), OK (green checkmark)

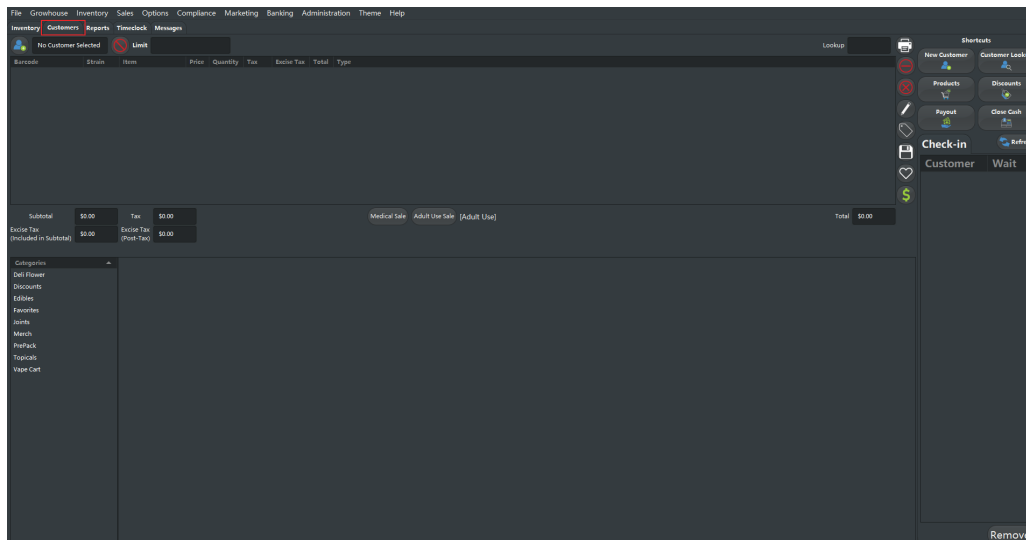
**Important Note:** At any point, if you feel unsure about making an adjustment, please contact the State for approval.

**Title:** Navigating the Point of Sale

**Summary:** An overview of the Point of Sale features, How to complete a sales transaction

**Tags:** Sale, Sales, Customers, Customer, Profile, Card, ID, Lookup, Pay, Payment, Commerical

The **Customers** tab is your Point of Sale where the bud tenders will create new patient/customer profiles, check in patients/customers, and sell the product.



By selecting **New Customer** on the right-hand side under Shortcuts, the *Customers* window will appear allowing you to create a new patient/customer profile. On this screen you can type or scan the ID and Medical Card into Search.

A screenshot of the 'New Customer' form. It features a search bar at the top with a 'Search' button. Below are three tabs: 'Basic Info', 'More Info', and 'Marketing'. The 'Basic Info' tab is active, showing fields for Last, Middle, First, Phone, Birthday, Email, Cell, Carrier, MMJ Card, Exp, DL #, Referral, Member (dropdown), Non-Member (dropdown), and Discount. At the bottom, there are buttons for 'Insert', 'Clear', 'Check-in', and 'Scanner'. A 'History' section with 'Notes', 'Conditions', and 'Caregiver' tabs is also present. At the very bottom, there are 'Print Ticket', 'Print Labels', and 'Print History' buttons, along with a 'Close' button.



Customers

✓ New Customer

Search  Search

Basic Info More Info Marketing

Address  Apt/Suite

City  State  Zip

Location  Test Retail   Is a Vendor

Gender   Is a Care Giver

Limit   MJ Tax  Default Rate

Care Giver  Non-MJ Tax  Default Rate

Doctor

Insert Clear Check-in Scanner

History Notes Conditions Caregiver

Item	Quantity

Print Ticket Print Labels Print History

Close

Customers

✓ New Customer

Search  Search

Basic Info More Info Marketing

Number of Visits

Spent to Date

Points Remaining

Exclude From Loyalty Points

Customer Referral

Email Opt-In

Text Messaging Opt-In

Create Loyalty Card

Paylander Pre-Register

Insert Clear Check-in Scanner

History Notes Conditions Caregiver

Item	Quantity

Print Ticket Print Labels Print History

Close

**Important Note:** You do not have to create a profile for Adult Use customers unless you want to. Furthermore, some States do not permit the creation of Adult Use customers so please refer to your State regulations.

The Lookup field located to the left of Shortcuts allows you to search Patients/Customers by last name, or products to add to the ticket for sale.

Lookup

From the Shortcuts navigation, you will find the following quick links.

New Customer = Create a new patient/customer profile

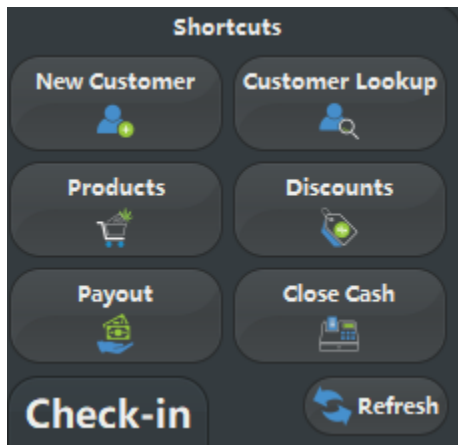
Customer Lookup = Look up existing patients/customers. You can modify the profile after lookup.

Products = Access your product build to modify your products

Discounts = Add, modify or delete Discount programs

Payout =Allows you to take money out of the terminal. This operation is PIN based and requires a reason for reporting.

Close Cash = Close down the terminals at the end of day or by rotating shift. This will generate your deposit and your Z-Out report.

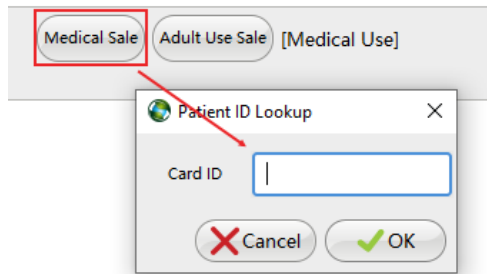


To the left of Shortcuts, you will see a vertical ribbon of action buttons related to making a sale. From here, you can do the following.

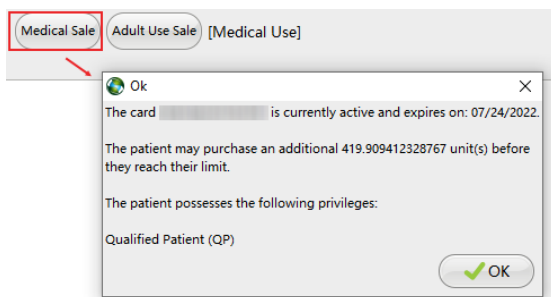
- Print
- Remove one line item from the ticket
- Remove all items from the ticket
- Edit
- On the fly Discounts
- Save
- Loyalty Points
- Cash out



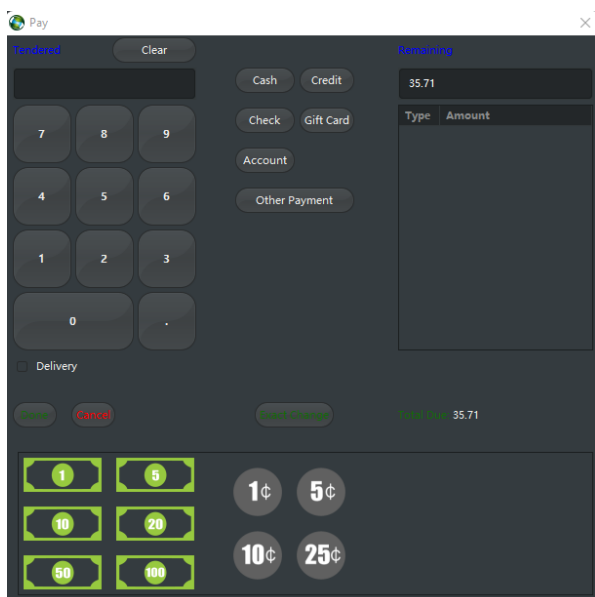
When you select “Medical Sale” from the **Customers** tab, the Patient ID Lookup window will appear with the patient ID in the Card ID field. You can also scan/enter in the patient ID into the Card ID field and select “OK.”



Once the card has been entered and verified, you will get a prompt for either an active or expired card. If active with available limits, click “OK” and add the items to the cart by scanning, clicking, or searching from the Lookup bar. Once items are added to the ticket, then you can apply any discounts, loyalty points, or simply tender the sale.



The *Pay* window below is the pay tender screen. You have a few options to enter the price. You can type the price in, click on the number pad, or click on the bills/change. You can also split transactions if needed. Once finished, your till will pop, receipts and labels will print, and the customer sale has been completed.



## Title: Building Your Products

**Summary:** How to build product

**Tags:** Product, Products, Product Build, Inventory, Price Point, Price Points, Commercial

The **Products** shortcut will take you to your *Products* build window. This is how you associate your inventory to your products.

The screenshot shows the 'Products' build window. The sidebar on the left contains the following fields: Existing Products, Strain, Type, Name, Category, Tax Category, Tax Category (Rec), Medical Label, Recreational Label, Icon Preview, Filename, Vendor, Cost Per Unit, and External Barcode. The main area has tabs for Options, Ingredients, Nutrition, Allergens, Misc., Packaging Info, and Custom Product Fields. The 'Options' tab is active, showing checkboxes for 'Requires Inventory', 'Requires Weighing', 'Member Discount', 'Members Only', 'Pre-Packaged Marijuana', and 'Tax Override Exempt'. Below this is a 'Price Point Table' with columns for Level, Amount, Price, and Post-Tax. The table is currently empty. At the bottom of the window are buttons for '+ New', 'Save', 'Delete', and 'Close', along with 'Generate', 'Print', and 'Quantity Available'.

- Strain - You can associate the strain to the product. This is optional and not needed for non-marijuana items.
- Type - This refers to your inventory type. When you take in a product its inventory type is set and should match the inventory type on this screen.
- Name - You can name your product whatever you wish.
- Important Note: Special Characters such as # \$ % ^ & \* ( ) \_ = + - are not allowed.
- Category - This allows you to categorize your products for the sales floor.
- Tax Category - Medical tax bracket
- Tax Category (Rec) - Adult Use (or Recreational) tax bracket
- Medical Label - Please refer to your regulations
- Recreational Label - Please refer to your regulations
- Icon Preview - Instead of seeing the shopping cart icon on the sales floor, you can upload a picture of your product.
- Vendor - You can associate a vendor with a product. This is optional.
- Cost Per Unit - Your cost per unit is generated when you take items in.

- Important Note: This cost per unit can be your cost per unit or the customer's. The cost per unit is dictated when you accept the product into Inventory.
- External Barcode - This assigns the product a different barcode and does not show on reports.
- **Options tab: Requires Inventory** - Should always be selected. If it is not, this will allow you to go negative in inventory.
- **Options tab: Marijuana** - Should be selected if the item contains marijuana. If this is a pipe, merchandise of any kind, even CBD, keep unselected.
- **Options tab: Requires weighing** - If this a FLOWER LOT keep selected, otherwise unselect as they are sold as EACH. A usable field will appear where you can enter in the usable (1gram, 50mg etc.) or leave blank.
- **Options tab: Member Discount** - If member levels are active, this will allow the customer to receive their member discount.
- **Options tab: Members Only** - You can make items exclusive to members only.
- **Options tab: Pre-Packaged Marijuana** - This is a different setup and if not done correctly will result in price points to be wrong when selling. Even if the item is pre-packaged, you can ignore this check box completely.
- **Price Point Table tab** – With or without member level pricing, you may see 2 sets of price points. One is for medical and the other is for Rec (Adult Use). They are different due to Taxes.

### **Rec (Adult Use) pricing**

You can price your products out by Pre-Excise (\$).

### **Medical pricing**

You will notice Medical pricing does not have an Excise Tax like Rec (Adult Use).

Per = How many packages or how many grams depending on the product

Post-Tax (\$) = Out the door cost and will account for any taxes

*Important Note*: All discounts are calculated pre-tax.

Video: Building Your Products

**Title:** Refunding and Voiding Sales

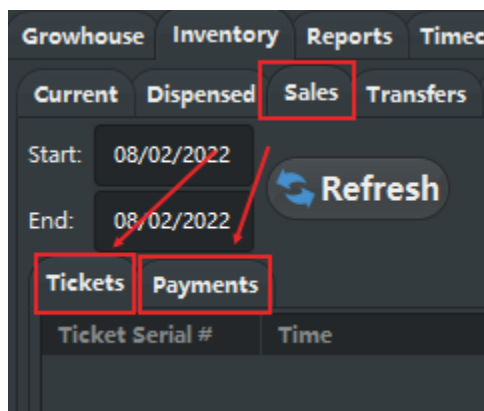
**Summary:** How to refund an item, When and how to void a sale

**Tags:** Refund, Refunds, Refunding, Void, Voiding, Ticket, Tickets, Payment, Payments, Commercial

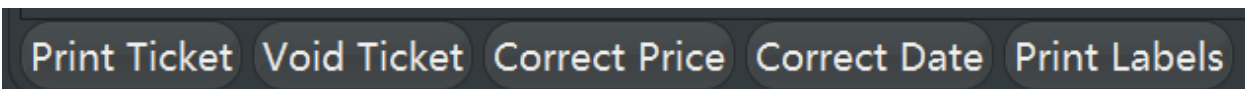
It may become necessary to process a refund and/or void after a sale. Voiding a sale makes it so it never happened; however, there is a report available. Refunding allows you to refund items on the ticket.

*Important Note:* If a sales ticket has a line item with a Quantity of more than 1, void the sale and start over. The system does not differentiate between 1 and many and will want to refund the entire quantity.

From the **Inventory** tab → **Sales** tab you will see **Tickets** and **Payments** sub-tabs. You can also filter the date range.



From the **Tickets** tab you can find sales tickets from a specific date or date range allowing you to see the items sold (Quantity) and who purchased them. At the bottom of the screen, you will find a few additional actions you can perform.



Print Ticket = Reprint the sales ticket

Void Ticket = Void the ticket as if it didn't happen

Correct Price = Correct a line item price on the ticket

Correct Date = Correct the date on the sales ticket

Print Labels = Reprint the Inventory Label for the item

From the **Payments** tab you can see the sales tickets from a specific date or date range allowing you to refund items. At the bottom of the screen, you will see 2 options – Refund and Modify.

Refund

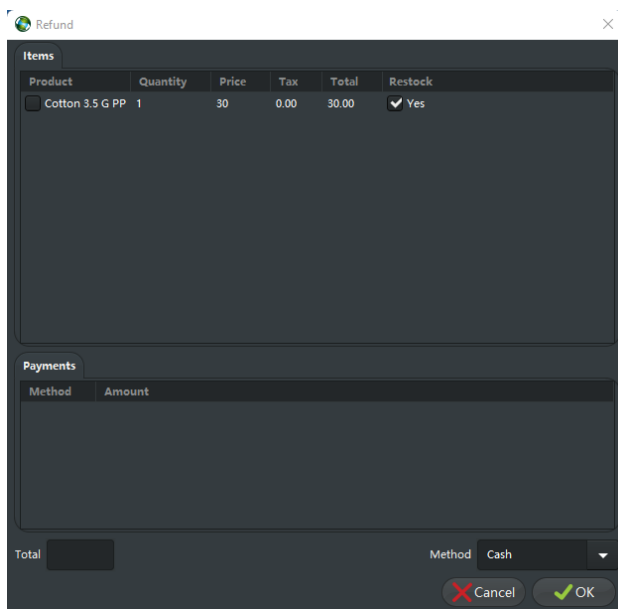
Refund will allow you to select the sales ticket and move forward with a refund.

Modify

Modify will allow you to change the method of payment and amount.

When you select a sales ticket and move forward with the refund, the *Refund* window will appear. From here you can select the item to refund, and restock if needed.

If you just select the product, it will offer a refund amount for that line item. However, if you have both the product and restock options selected, it will refund and restock the item in question.



The screenshot shows a window titled "Refund" with a close button in the top right corner. The window is divided into two main sections: "Items" and "Payments".

The "Items" section contains a table with the following data:

Product	Quantity	Price	Tax	Total	Restock
<input type="checkbox"/> Cotton 3.5 G PP	1	30	0.00	30.00	<input checked="" type="checkbox"/> Yes

The "Payments" section contains a table with the following data:

Method	Amount
--------	--------

At the bottom of the window, there is a "Total" field with a value of 30.00, a "Method" dropdown menu set to "Cash", and two buttons: "Cancel" (with a red X icon) and "OK" (with a green checkmark icon).

**Important Note:** If the quantity is more than 1, void the ticket instead and re-ring correctly.



**Title:** Setting Up Tax Categories

**Summary:** How to set up Tax Categories or update Tax Categories when adding Recreational sales

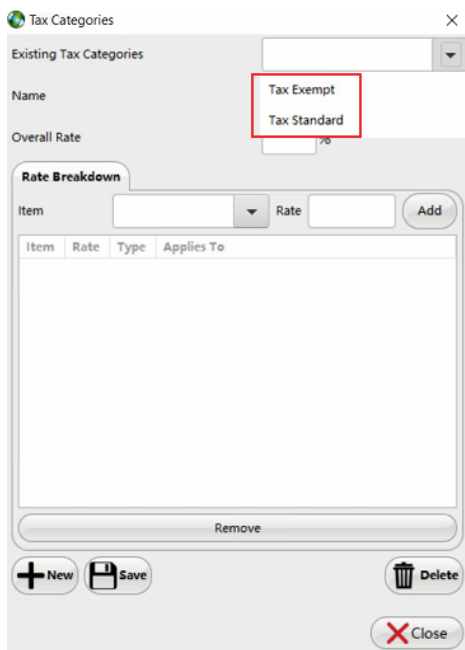
**Tags:** Tax, Tax Category, Tax Categories, Taxes, Exempt, Standard, Excise, Commercial

Whether your State allows for Medical, or Medical & Recreational sales, you will need to make sure things are correct in your BioTrack Commercial System.

You will need to set up or update your Tax Categories, Product build, and verify other system options. In BioTrack, you will always see Tax Exempt and Tax Standard. Depending on how you want it set up, you may need to add a Medical Tax category and/or a Recreational Tax category. These Tax Categories will be attached to your Product build. If using the Delivery Module, and traveling outside of your City/County to make deliveries, you will need to add Tax Categories for the other Cities/Counties as well.

- If you use Tax Standard for your medical products, add another Tax Category for your recreational items.
- If you use Tax Standard for Medical, please make sure the Overall Rate set to 0% or switch it to Tax Exempt.
- In the Rate Breakdown section, add in the different taxes and rates. Excise is your Marijuana tax.
- You can also add your State/City/County tax, if applicable for Recreational (Adult Use) sales.

**Important Note:** Please check your State regulations for tax information and breakdown.



**Tax Categories** [X]

Location: Test Retail

Existing Tax Categories: [ ]

Name: Medical

Overall Rate: 0%

Include in all visible locations

**Rate Breakdown**

Item: [ ] Rate: [ ] Add

Item	Rate

Remove

+ New Save Delete Close

**Tax Categories** [X]

Existing Tax Categories: [ ]

Name: Recreational Tax

Overall Rate: [ ]%

**Rate Breakdown**

Item: [ ] Rate: 12 Add

Item	Rate	City
		County
		Excise
		Local
		State

Remove

+ New Save Delete Close

Shown below is your *Products* window, which determines your product name, taxes, categories, labels, and price points. There is no need to add more products to your system. From this window, you can set the Tax Category for Medical and Recreational items, select Labels for each, and set up different price points for your Medical and Recreational items.

- If you are going Recreational, you will have to update all your products manually to reflect the price change (i.e. Medical vs. Recreational).
- If you are a Producer / Processor and only Medical or a retail location not implementing Recreational sales, these changes would not apply.

Products

Existing Products:

Strain:

Type:

Name:

Category:

Tax Category:

Tax Category (Rec):

Medical Label:

Recreational Label:

Icon Preview:

Filename:

Vendor:

Cost Per Unit:

Quantity Available:

**Options** **Ingredients** **Nutrition** **Allergens** **Misc.** **Packaging Info** **Custom Product Fields**

Requires Inventory  Marijuana

Requires Weighing

Member Discount  Members Only

Pre-Packaged Marijuana

Require Barcode Scan  Tax Override Exempt

**Price Point Table** **Price Point Table (Rec)**

Level:

Amount	Price	Post-Tax

**Title:** Enabling Delivery Module

**Summary:** How to enable delivery capabilities within the BioTrack System

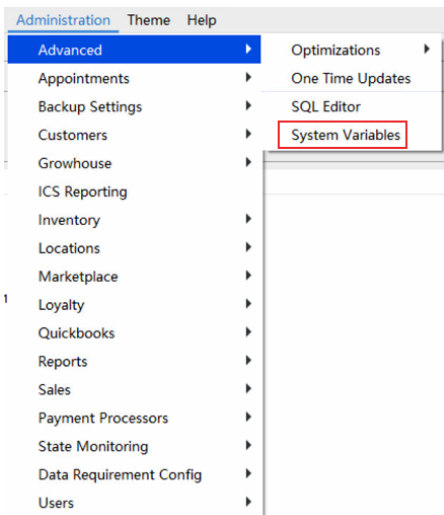
**Tags:** Delivery, Pickup, Pick-up, Delivery Module, Delivery Management, Commercial

For retailers that are able to make deliveries, you will want to enable the Delivery Module within your BioTrack Commercial System. This feature allows you to complete Delivery and Pickup sales for both Medical and Recreational customers. In order to turn on this option in your system, take the following steps.

- Go to the **Administration** menu → **Advanced** → **System Variables**.
- Select “On” for Delivery Module Enabled.
- Click “OK” or “Save”.
- Log out of BioTrack and then back in.

You will also need to go into **Modify Users** and ensure the user(s) you want to have access to the Delivery/Pickup feature have the permission to do so. Find the user(s) and check the box next to “Delivery Management” in the Sales section.

Log out of BioTrack once more and then back in for the changes to take effect.



System Variables

**System Settings**

Age limit for Medical Sales 21

Auto-populate Birthdate on Check-in  
 On  Off

Cash Close Daily  
 On  Off

**Delivery Module Enabled**  
 On  Off

Display Inactive Users  
 On  Off

Enable Advanced Conversions  
 On  Off

Enable TransactFirst API Integration  
 On  Off

Enhanced Transfers  
 On  Off

Estimated Receive Date 3

Fair Market Value Transfer  
 On  Off

Modify User

Username:

Password:

Full Name:

Phone #:

Administrator  
 Active  
 Manager/Agent Of Record

Reset PIN

**Locations**

Location:

Employee

Name:  Employee

Add Update Remove

**Permissions**

- View Sales
  - Any Date Range
- View Transfers
  - Any Date Range
- Void Transfers
- View Cost Per Unit
- Modify Default Prepack Derived Quantities
- Order Tags
- Sales
  - Close Cash
  - Delivery Management**
  - Modify Categories
  - Modify Discounts
  - Modify Payments
  - Modify Products
  - Modify Tax Categories
- On The Fly Discounts
  - No Limit
- Payouts
- Refund Payment
- Void Tickets
- Clear Ticket Items
- Remove Items From Ticket
- Remove Customer From Batch

Shortcuts

Administrator  
Front Desk  
Sales Clerk  
Sales Manager  
Grower  
Harvester  
Grow Manager

Cancel OK

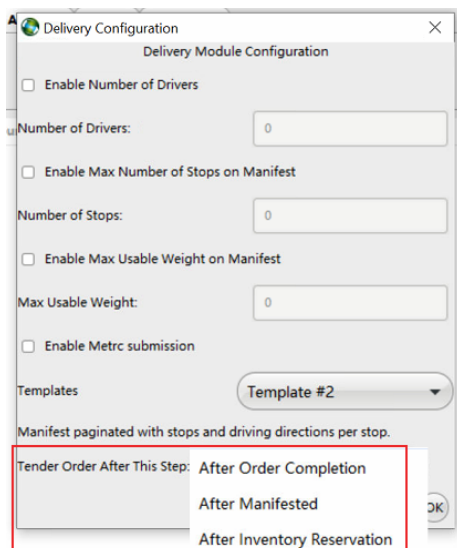
**Title:** Setting up Sales for Delivery and Pickup

**Summary:** How to set up a Pickup sale, How to set up a Delivery sale

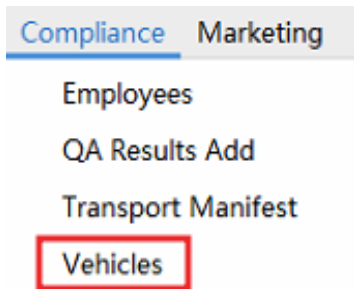
**Tags:** Delivery, Deliveries, Pickup, Pick-up, Delivery Configuration, Drivers, Employees, Vehicles, Preorders, Commercial

Before you can complete sales through the Delivery / Pickup feature you will need to go to the **Administration** menu → **Sales** → **Delivery** → **Configuration**.

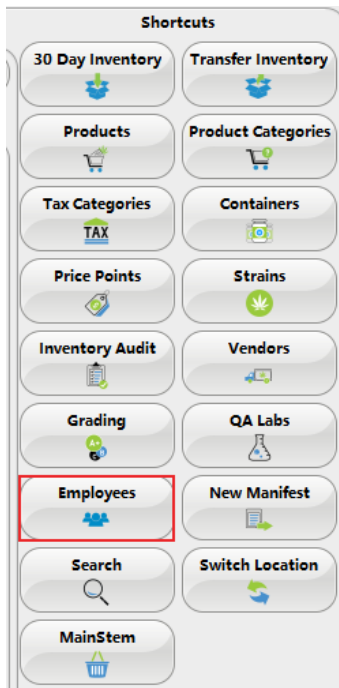
From the *Delivery Configuration* window, set up the Number of Drivers, the Number of Stops, and choose After Order Completion for Tender Order After This Step.



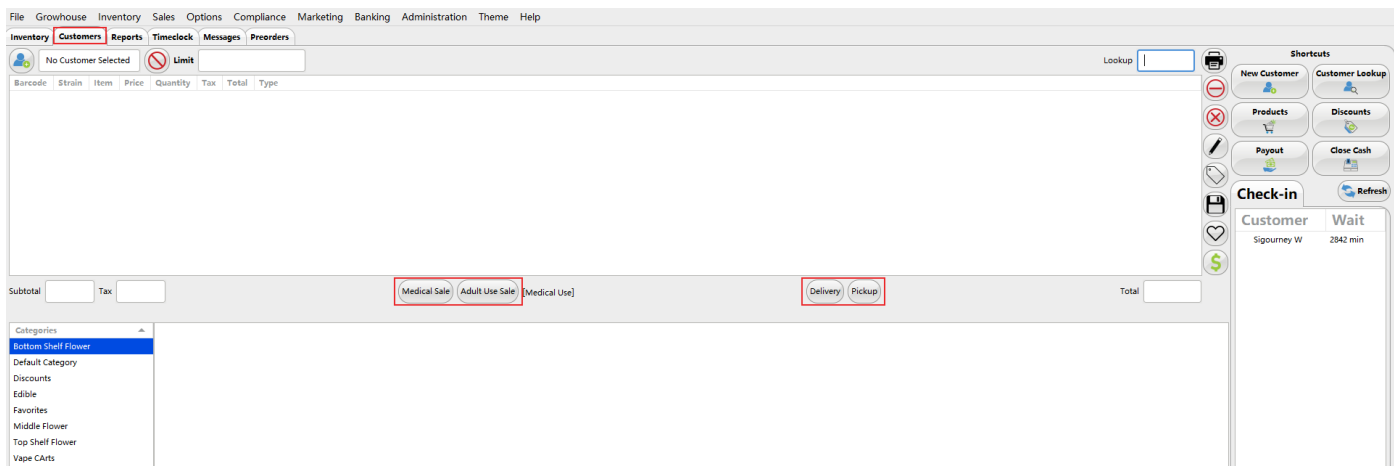
If you do not have any Drivers or Vehicles on file yet, go to the **Compliance** menu → **Vehicles** to enter all vehicles that will be transporting products to your customers.



The Employees added from the **Employees** Shortcut are your Drivers that will appear on the manifest for deliveries.

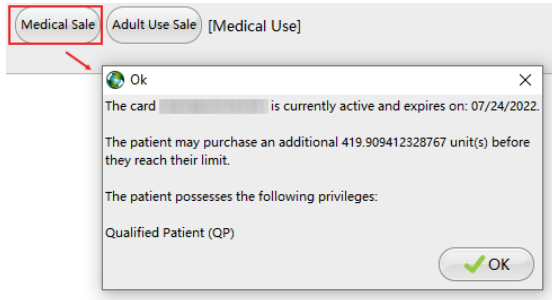


Once the Delivery Module is turned on, you will see a “Medical Sale” and a “Adult Use Sale” button on the **Customers** tab where your sales are processed. To the right you will also see a “Delivery” and a “Pickup” button.

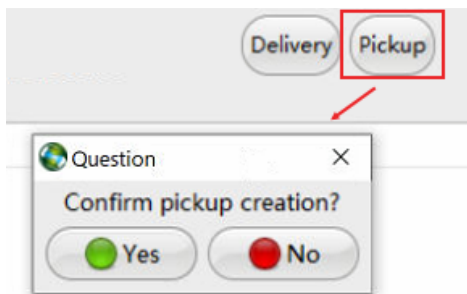


## Medical Pickup Sale

When you select “Medical Sale,” the patient ID will appear in the box. You can also scan/enter in the patient ID into the Card ID field and select “OK.”



Once the card has been entered and verified, you will receive a prompt for an active or expired card. If active with available limits, click “OK” and add the items to the cart by scanning, clicking, or searching from the Lookup bar. Once items are added to the ticket, click the “Pickup” button. Select “Yes” to confirm.



After you confirm the Pickup, it will reserve your inventory and move the ticket under the **Preorders** tab → **Pickup**.

File Growhouse Inventory Sales Options Compliance Marketing Banking Administration Theme Help

Inventory Customers Reports Timeclock Messages **Preorders**

(0) Online (1) **Pickup** (3) Delivery (2) Out for Delivery Completed Manifests

Originating System	ID	External ID	Created	Customer Name	Customer Phone	Product	Inventory ID	Quantity	Price	Tax	Total
BiotrackTHC	22		03/12/22 14:08:12	Snow, Jon	9876545678	Mo Edi frm inter 100 mg	9341310251474792	1	11.00	0%	11.00
										Total:	11.00

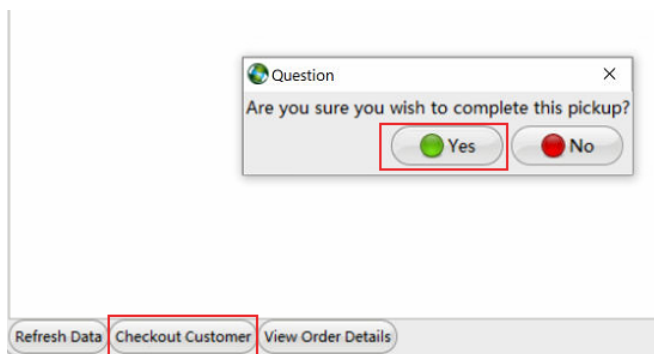
At the bottom of the Pickup screen you'll see additional action options.

- Refresh Data
- Checkout Customer
- View Order Details
- Void Orders





When selecting “Checkout Customer,” you will be prompted to complete the pickup.



After clicking “Yes” to confirm, your *Pay* tender window will appear allowing you to select the type of payment taken. Once entered, the sale will be complete and you can move onto another Pickup or standard sale.



### Adult-Use Delivery Sale

With Tax Categories created for other City/County tax rates, you will be able to assign a custom Tax Category to the Customer’s Profile depending on where they live. This tax will be charged when a delivery is made and will be based on their City/County rate(s).

From the **More Info** tab in the Customer Profile, you will see “Delivery Tax Override” fields where you can set the customer’s MJ Tax and Non-MJ Tax per their City/County.

New Customer

Search  Search

**Basic Info** **More Info** Marketing

Address  Apt/Suite

City  State  Zip

Location  Best nr JF Best  Is a Vendor

Gender   Is a Care Giver

Limit   MJ Tax  Default Rate

Care Giver  Non-MJ Tax  Default Rate

Doctor

Delivery Tax Override

MJ Tax  Default Rate

Non-MJ Tax  Default Rate

[Important Note:](#) Please check your State regulations for tax information and breakdown.

You will still check-in the Customer, select “Adult-Use Sale,” and add the items they are purchasing to the cart. Then click the “Delivery” button.

Question

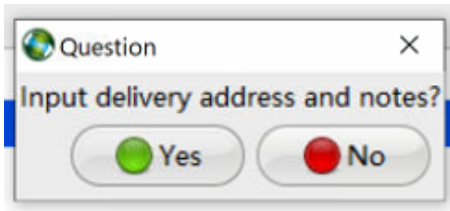
This customer has a custom tax rate for delivery. Recalculate?

After selecting “Yes” to confirm recalculation of the tax rate for delivery, it will then ask you to confirm delivery creation. Click “Yes.”

Question

Confirm delivery creation?

Once the delivery creation is confirmed, you will be prompted to input the delivery address and notes. Click “Yes” to proceed to the Delivery Details Entry window where you can add or modify the address and any notes.

A window titled "Delivery Details Entry" with a close button (X) in the top right corner. The title bar also says "Order Details Entry". The form contains several input fields: "Customer Name" (filled with "Snow, Jon"), "Street" (with a greyed-out placeholder), "City" (filled with "Albuquerque"), "State" (filled with "NM"), and "Zip" (filled with "87104"). There are also labels for "Request Time" and "Notes" with empty input areas below them. At the bottom of the window are two buttons: "Cancel" and a "Save" button with a floppy disk icon.

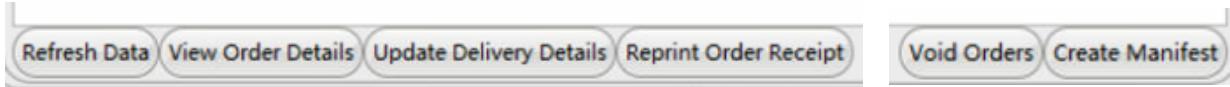
After selecting the disc to Save, the order will be saved and inventory reserved. To locate this ticket go to the **Preorders** tab → **Delivery**.

A screenshot of a software interface showing a navigation menu at the top with tabs for "Inventory", "Customers", "Reports", "Timeclock", "Messages", and "Preorders". The "Preorders" tab is selected and highlighted with a red box. Below the navigation menu is a sub-menu with buttons for "(0) Online", "(0) Pickup", "(4) Delivery", "(2) Out for Delivery", and "Completed Manifests". The "(4) Delivery" button is also highlighted with a red box. Below this is a table with columns: "Origination", "Transaction ID", "Item Count", "Customer", "Address", "City", "Zip", and "Requested Delivery Time". The table contains several rows, with the bottom row highlighted in blue: "BiotrackTHC", "23", "1", "Snow, Jon", "2000 Mountain Rd NW", "Albuquerque", "87104", and "03/12/22 14:19:39".

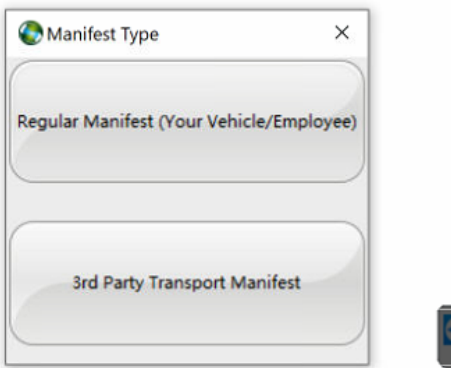
At the bottom of the Delivery screen you'll see additional action options.

- Refresh Data
- View Order Details = Allows you to see the order(s) you can modify, void or print labels
- Update Delivery Details = Allows you to update the address or add notes

- Reprint Order Receipt
- Void Orders
- Create Manifest



When you select “Create Manifest,” you have the option of Regular Manifest (Your Vehicle/Employee) or 3rd Party Transport Manifest. For 3rd Party Transport, be sure to sync from the **Administration** menu → **State Monitoring** → **Synchronization** → **3rd Party Transport**.



For a Regular Manifest, follow these steps:

- Select the Arrival
- Update the Date and Time
- The route should populate, but if it doesn't please manually enter the turn by turn directions
- Attach the Employee(s) and Vehicle at the bottom of the screen
- Click “Generate”

Delivery Manifest

Regular Manifest

**Step 1**

Departure: 03 / 12 / 2022 3 : 36 : 56 PM

Arrival: Snow, Jon 03 / 12 / 2022 4 : 06 : 56 PM

Route: Head west toward Calle Po Ae Pi.  
Turn left onto Calle Po Ae Pi.  
Turn left at the 1st cross street onto NM-284 E/Airport Rd.

\* These directions are for planning purposes only. You may find that the suggested route takes you outside the State of New Mexico; you must plan your route so that you remain within the State of New Mexico at all times.

**Order Items**

Barcode	Strain	Item	Price	Quantity	Tax	Total
0047 8404 2949 7853	Hells Fire 2	Apple Punch 100mg	6.83	1	1.51	8.34

Generate Employee Ken Smith Employee #2 Jacob Martin Vehicle BERT

After creating the manifest, the order(s) will be moved to the **Preorders** tab → **Out for Delivery**.

Inventory Customers Reports Timeclock Messages **Preorders**

(0) Online (0) Pickup (3) Delivery (3) **Out for Delivery** Completed Manifests

Manifest ID:

Est Start Date: 03/12/2022


Active Days

Manifest ID	External ID	Stops	Estimate Start Time	Estimate End Time	Driver	Vehicle	Stops Completed	Estimated Time	Progress	Actual Start Time
8680 5552 8768 6129		1	03/12/22 13:44:53	03/12/22 14:14:53	Ellen Ripley Bishop Weyland	The Van	0	0.50 Hours	Not Started	
	Order ID: 24	Snow, Jon								24
	Item	Quantity	Price	Tax	Total		Inventory Barcode			24
	Angel 100 mg top	1	9.39	2.08	11.47		1709210291249618			24

At the bottom of the Out for Delivery screen you will see the additional action options.

- Refresh Data
- View Manifest Details
- Void Manifest
- Print Labels
- Reprint Order Receipt
- Print Manifest
- Show Voided Manifests
- Start Manifest

If you select “Start Manifest,” you will be able to launch the Marijuana Delivery Manifest and an option for “Undo Start Manifest” will appear.

Marijuana Delivery Manifest						Page 1 of 1
Date:	03/12/22 13:44:53		License #:	80002		Barcode
Licensee Name:			Vehicle ID #:			 8680555287686129
Licensee Address:			Vehicle Color / Make / Model / License Plate:	White / Ford Transit / AMDY19		
			Licensee Phone:			
Transporter #1 Name:	Ellen Ripley	Transporter #1 Date of Birth:	01 / 07 / 1949	Transporter #1 ID:	Transporter #1 Signature:	
Transporter #2 Name:	Bishop Weyland	Transporter #2 Date of Birth:	01 / 01 / 1945	Transporter #2 ID:	Transporter #2 Signature:	
Stop #1 of 1 (1 Items)						
Destination Customer Name:	Jon Snow		Approx. Departure Date/Time:	03/12/22 13:44:53		
Destination Customer Card #:			Approx. Arrival Date/Time:	03/12/22 14:14:53		
Destination Customer Address:						
Destination Customer Phone:						
Travel Route:						
Head west toward Calle Po Ae Pi. Turn left onto Calle Po Ae Pi. Turn left at the 1st cross street onto NM284 E/Airport Rd. Turn right onto Cerrillos Rd. Keep right to continue on NM-14 S/Cerrillos Rd. Merge onto I-25 S via the ramp to Albuquerque. Take exit 226A-226B to merge onto I-40 W toward Gallup. Take exit 157A toward Rio Grande Blvd. Turn left onto Rio Grande Blvd NW. Turn left onto Mountain Rd NW. Turn right onto 19th St NW. Turn right						
Instructions: If the quantity received is less than the quantity shipped, check the box in the appropriate field below and indicate the actual quantity received.						
Stop 1, Items 1-1 of 1						Manifest ID
#	Batch / Lot ID	Item Description	Shipped	Received		
1	1709210291249618	Angel 100 mg top	1	<input type="checkbox"/>		
2						
3						
4						
-						

After the delivery is completed, you’ll want to tender the sale by clicking “View Manifest Details.” The *Manifest Order Details* window will appear, where you can perform the following:

- Update the Customer information
- Enter the Actual time of travel
- Modify the Order details
- Void the Order, and
- Print Labels

To complete the delivery, click the “Complete Delivery” button. This will change the order from “in progress” to completed.

Stop #	Completed	Customer Name	Customer Address	Customer Phone	Transaction ID	# of Items	Order
1	No	Snow, Jon		9876545678	24	1	

Customer Name: Snow, Jon  
Customer Phone: 9876545678  
Customer DOB: 10/10/1980  
Customer Address:   
Customer Apt/Suite:   
Customer City:   
Customer Zip:   
Estimated Order Time: Estimated Start: 03/12/22 13:44:53, Estimated End: 03/12/22 14:14:53  
Actual Order Time: Actual Start: , Actual End:   
Total Estimated Time:   
Total Actual Time:   
Order Details: Inventory ID: 1709210291249618, Product: Angel 100 mg top, Quantity: 1  
Total Tax: 2.08, Total: 11.47

Buttons: Modify Order Details, Void Order, Print Customer Labels, Reschedule Delivery, Complete Delivery, Cancel, OK

Footer: Refresh Data, View Manifest Details, Void Manifest, Print Labels, Reprint Order Receipt, Print Manifest, Show Voided Manifests, Undo Start Manifest, Start Manifest

Once the delivery is completed, you can go to the **Preorders** tab → **Completed Manifests** to view all completed orders by date.

File Growhouse Inventory Sales Options Compliance Marketing Banking Administration Theme Help

Inventory Customers Reports Timeclock Messages **Preorders**

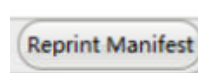
(0) Online (0) Pickup (3) Delivery (2) Out for Delivery **Completed Manifests**

Completed Date: 03/12/2022 Refresh Data

Manifest Start Time	Manifest Stop Time	Manifest ID	External ID	Stops	Driver	Vehicle	Stops Completed	Stops Rescheduled	Stops Voided
03/12/22 07:49:10	03/12/22 14:49:37	8680 5552 8768 6129		1	Bishop Weyland Ellen Ripley	The Van	1	0	0

At the bottom of the Completed Manifests screen you'll see additional action options.

- Reprint Order Receipt
- Reprint Order Labels
- Reprint Manifest



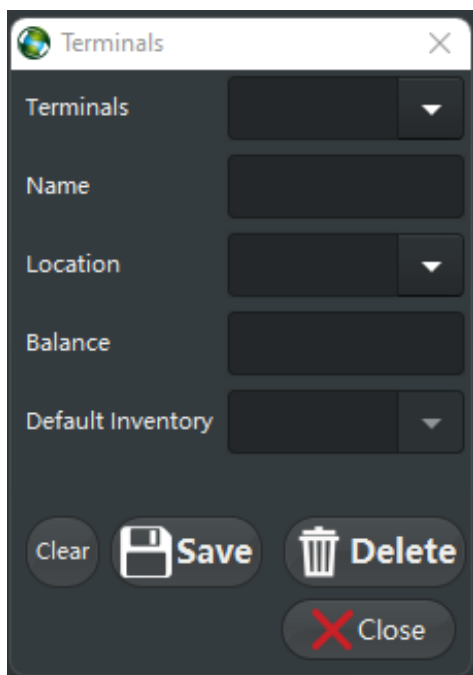
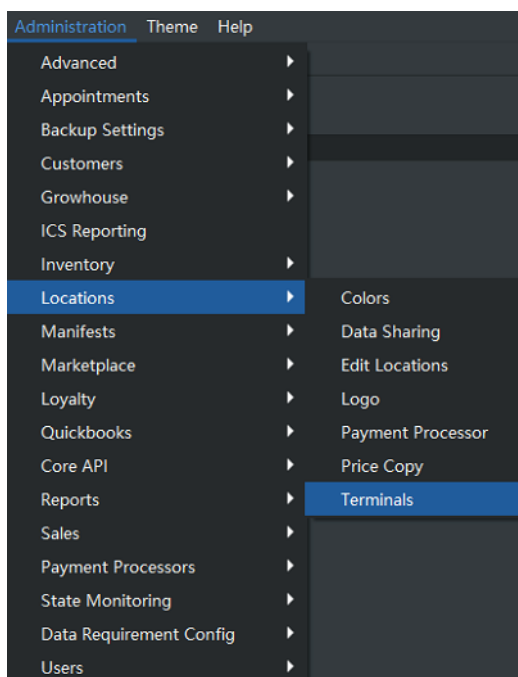
**Title:** Setting up a Terminal

**Summary:** How to set up a terminal

**Tags:** Terminal, Terminals, Location, Locations, Commercial

The very top of the screen will list your current location and your terminal name or number. By default, every terminal that connects to the system is assigned a number. You can associate an actual name with each terminal for ease of recognition. Additionally, you can choose the default location a terminal logs into.

To begin, go to the **Administration** menu → **Locations** → **Terminals**.





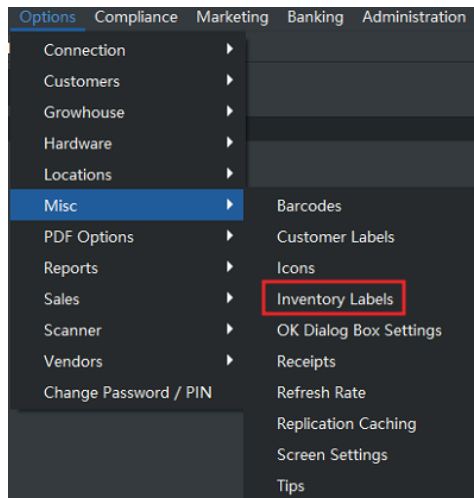
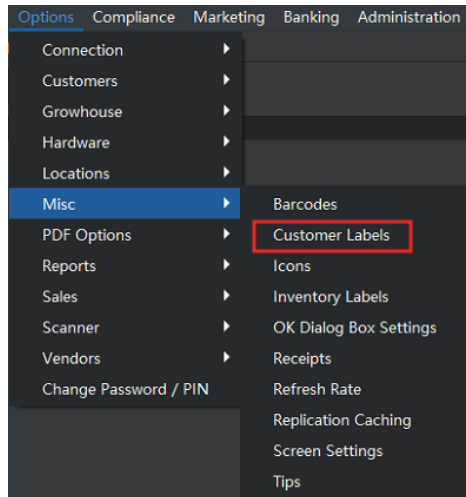
- Click into the Terminals drop down and select Terminal number 1. Once selected, we can assign a Name (instead of just a number) to it. For example, POS1.
- The Location drop down can be used to decide which location, by default, anyone using that terminal logs into. For example, if you have a Growhouse and a Dispensary location, you would want to make sure your terminals located at the Growhouse are automatically logging into that location. Otherwise, they'll need to switch locations every time they login and that tends to lead to confusion.
- If a terminal no longer exists, you can select it from the Terminals drop down and click the "Delete" button, removing the terminal from the system.
- The Balance field refers to the "floating cash" or "opening cash amount" a retail store may have in that specific terminal. (*Note*: This field is used for retail only.)
- Default Inventory allows you to associate a default Inventory Room to a terminal.

**Title:** Creating Customer and Inventory Labels

**Summary:** How to create and build a customer or inventory label

**Tags:** Label, Labels, Customer Labels, Inventory Labels, Objects, Variables, Commercial

Both your Inventory and Customer Label templates can be found from the **Options** menu → **Misc** → **Labels** (Customer or Inventory) section.



The label setup is broken up into four object types: Images, Variables, Lines and Custom text.

Some of the Variables that you can choose from include:

- Customer Name
- Product Name
- Strain Type (Indica/Sativa)
- Weight (or Quantity)

- Customer MMJ #
- Batch #
- Date and License # (where applicable)

The font size may depend on your State regulations. The X and Y offsets will determine how far from the left and top the objects will appear. Once the placement and font size have been selected, click “Add” to add it to the Preview label. If you do not like the placement, simply look up the variable in the Object list, double click it, and make the necessary adjustments.

*Tip:* Select the item you wish to modify, this will allow you to use the arrow keys on your keyboard to move the variable around in the Preview area.

