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.

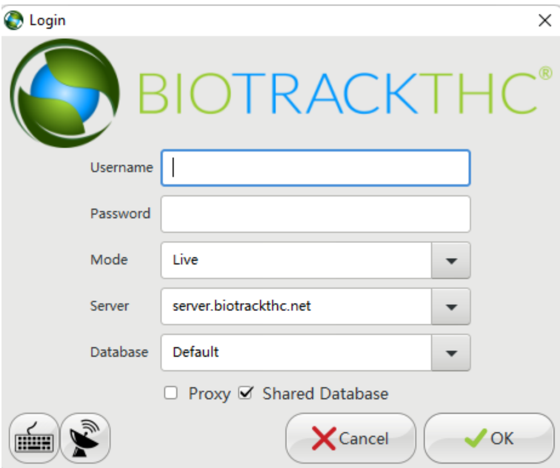
These two platforms are separate but communicate via State Monitoring settings. While you can still log into your State Traceability platform, it is for compliance purposes and will not give you as much functionality as the BioTrack Commercial platform.

Title: Logging into BioTrack Commercial

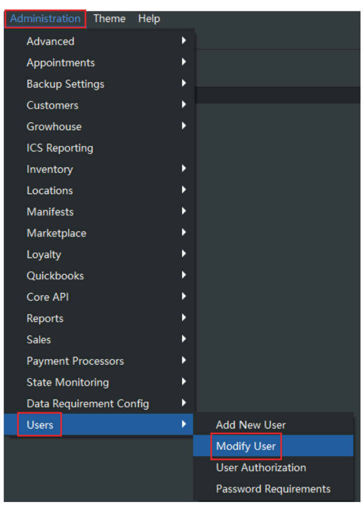
Summary: How to log into BioTrack's Commercial system

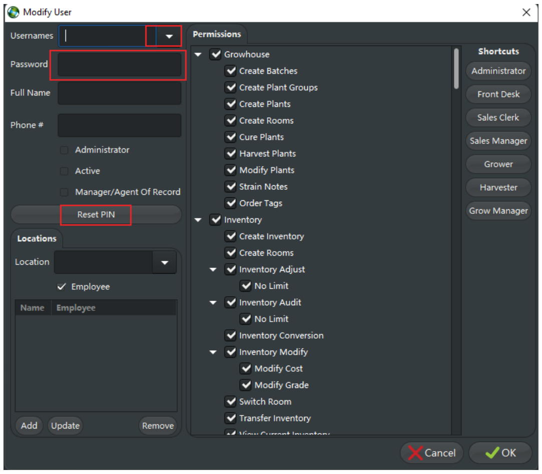
Tags: Logging in, Login, Log in, Username, Password, Users, User, PIN, Commercial

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.



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

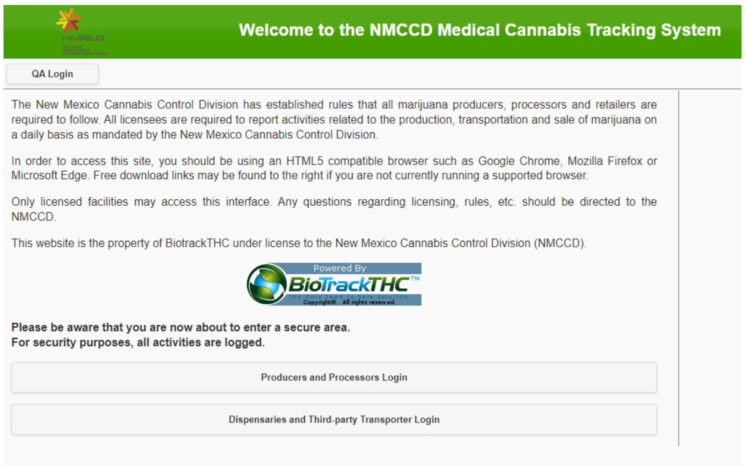



Modify User
Usernames
Password
Full Name
Phone #
Administrator
Active
Manager/Agent Of Record
Reset PIN
Locations
Location
Employee
Name
Employee
Add
Update
Remove
Permissions
Growhouse
Create Batches
Create Plant Groups
Create Plants
Create Rooms
Cure Plants
Harvest Plants
Modify Plants
Strain Notes
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
Administrator
Front Desk
Sales Clerk
Sales Manager
Grower
Harvester
Grow Manager
Cancel
OK

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

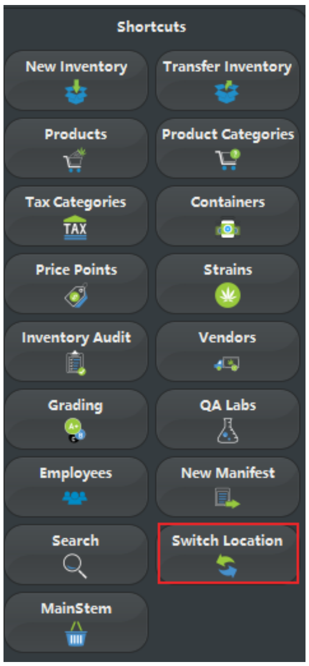
Video: Resetting Traceability Password

Title: Switching Locations

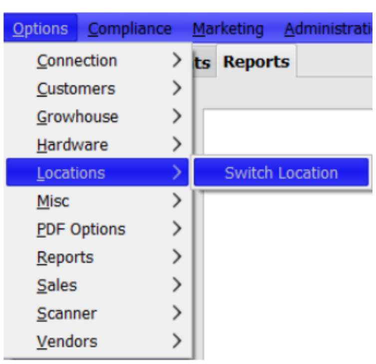
Summary: How to switch between locations in BioTrack's Commercial system

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

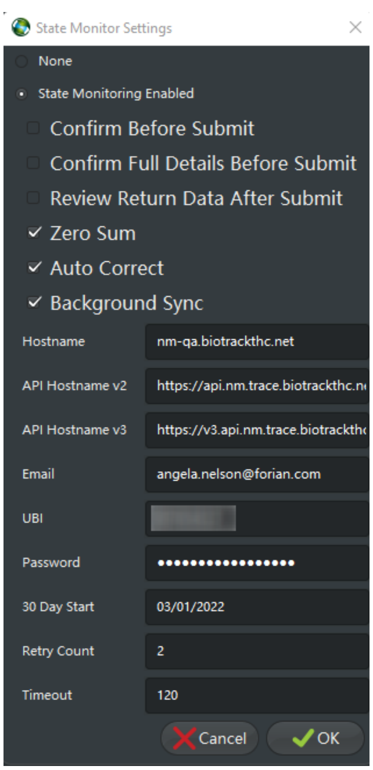
Summary: How to connect your BioTrack Commercial system to your State Traceability system and perform syncs

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.



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

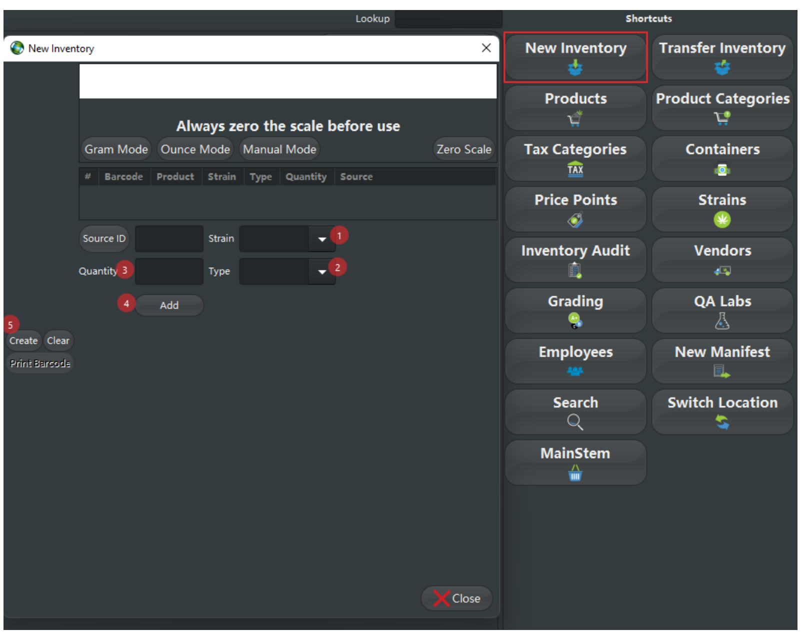
Summary: How to take in initial inventory for cultivation

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.

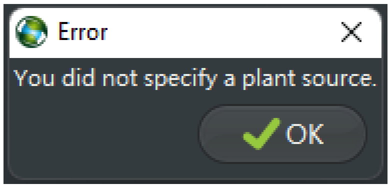
To take in new inventory, select **New Inventory** from the right-hand side under Shortcuts. The *New Inventory* window will appear. Follow the steps below to complete your intake of inventory.

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

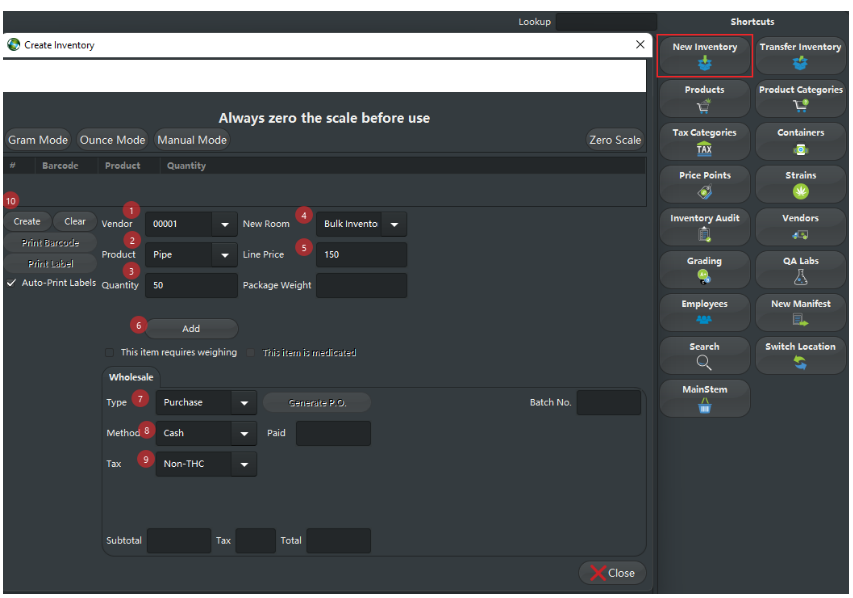
Tags: Inventory, New Inventory, Retail, Dispensary, Commercial

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

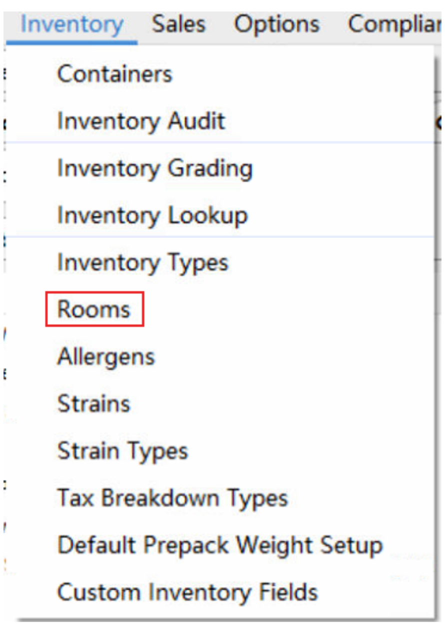
Summary: How to create, modify and delete rooms for inventory

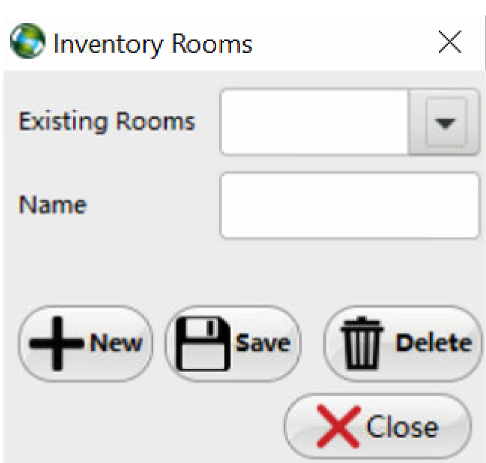
Tags: Inventory Rooms, Inventory Room, Commercial

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.





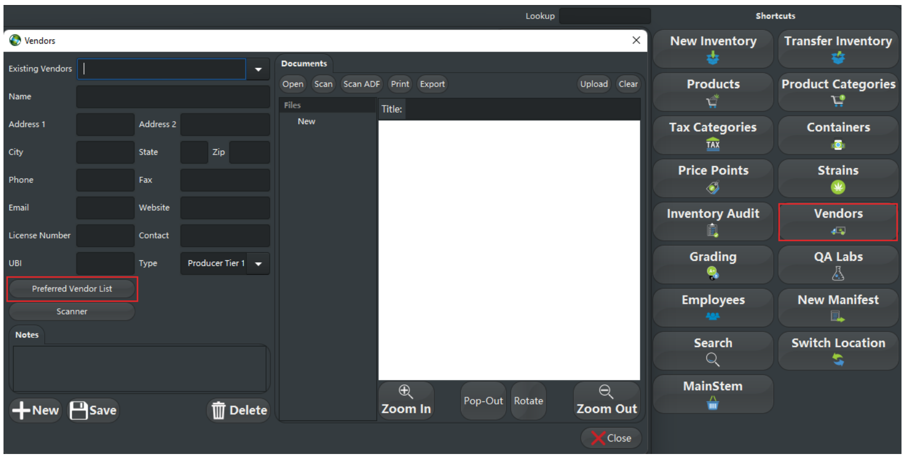
Important Note: Before deleting a room, please make sure there is no Inventory in there.

Title: Accessing Your Preferred Vendor List

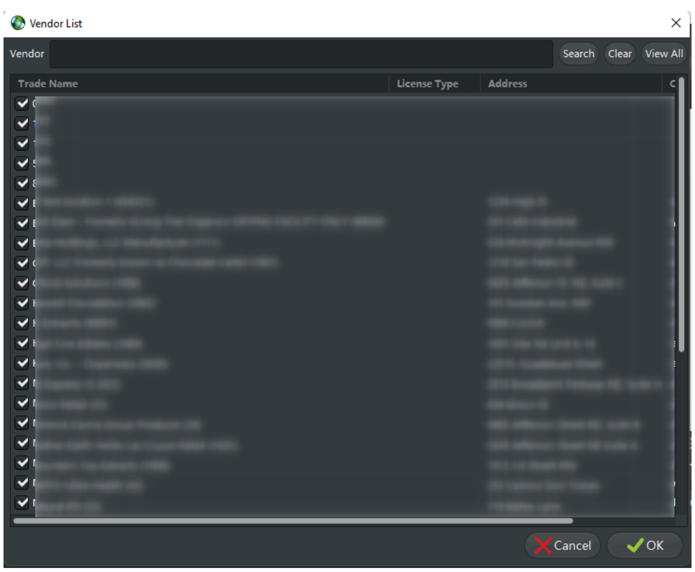
Summary: How to access your vendors and your State's preferred vendor list

Tags: Vendor, Vendors, Vendor List, Commercial

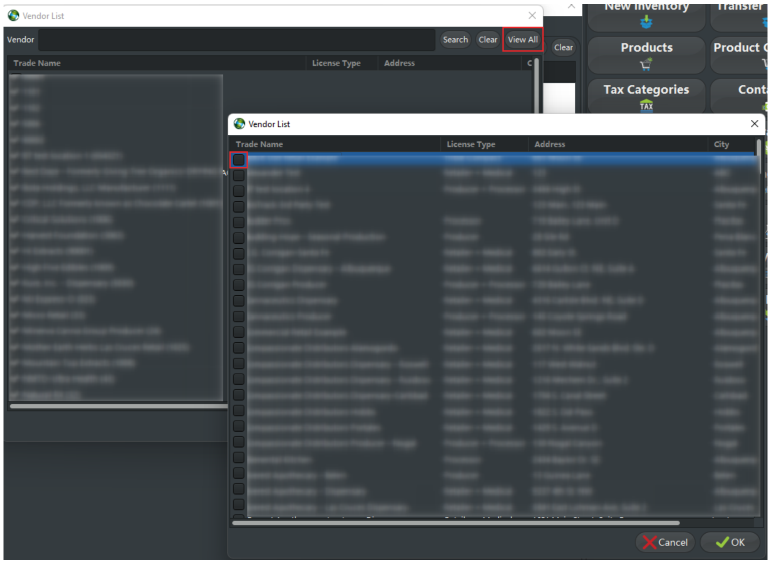
Vendors are other licensees with an active license from the State. The BioTrack Commercial system works off a Preferred Vendor List. To view your preferred vendors, click the **Vendors** shortcut on the right-hand side and then the "Preferred Vendor List" button.



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.

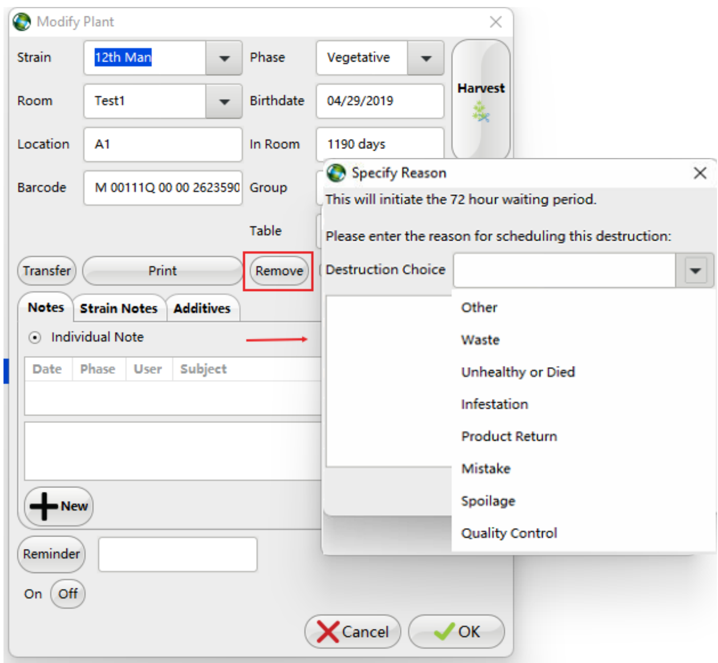
Title: Destroying Plant Inventory

Summary: How to set one plant or multiple plants destruction

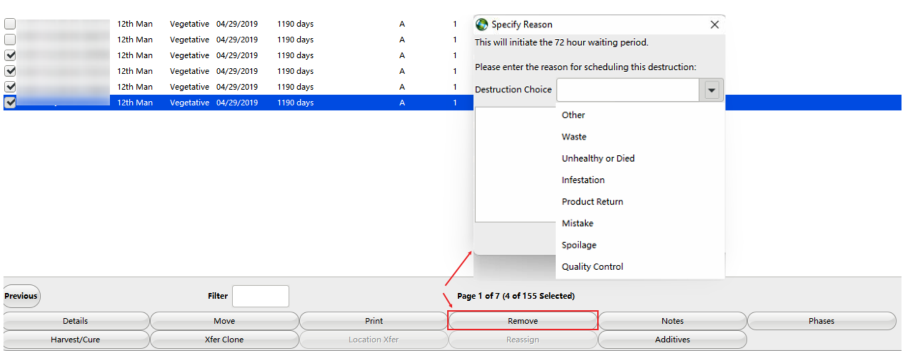
Tags: Plant, Plants, Destroy, Destruction, Undo, Cultivation, Growhouse, Commercial

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.

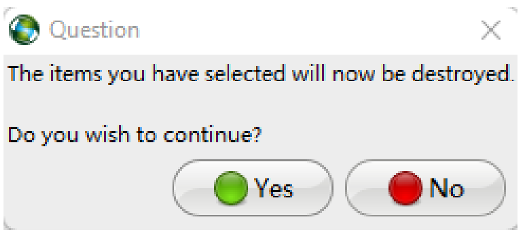


To set multiple plants for destruction, select the plants you need to schedule for destruction from the **Growhouse** tab and then click "Remove" at the bottom of the screen. The *Specify Reason* window will appear where you can use the drop down to select the Destruction Choice and enter a reason for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



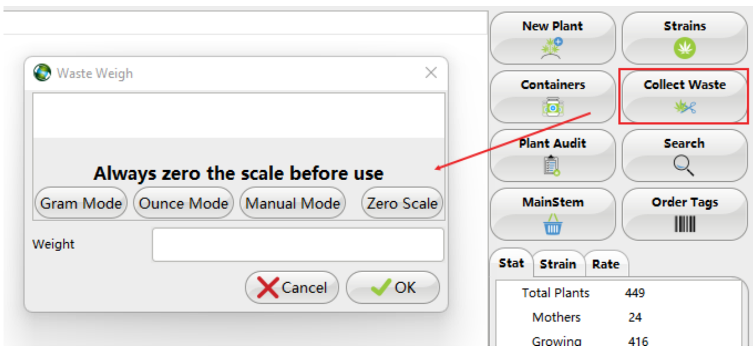
Important Note: You can undo a destruction notification from the **Growhouse** menu → ***Undo*** → ***Undo Destruction Notification***.

Title: Collecting Waste

Summary: How to collect waste and schedule for destruction

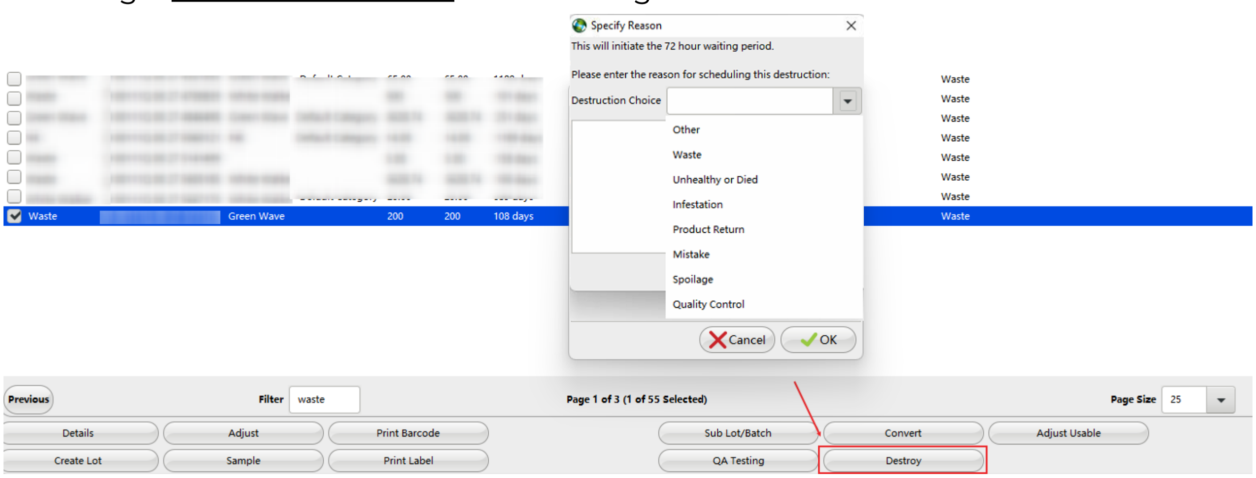
Tags: Waste, Collect Waste, Destroy, Destruction, Undo, Cultivation, Growhouse, Commercial

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

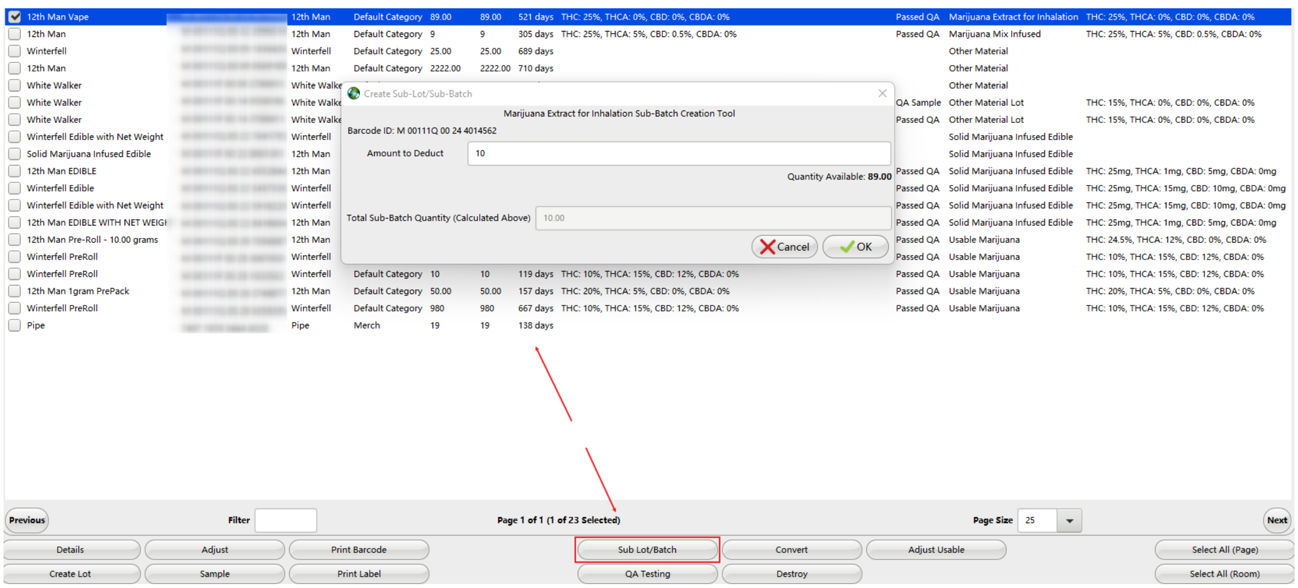
Summary: What is a sub lot, when to sub lot and how to generate a sub lot

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.



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.

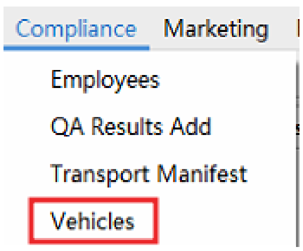
Title: Adding Vehicles and Creating Drivers (Employees) for Transfers

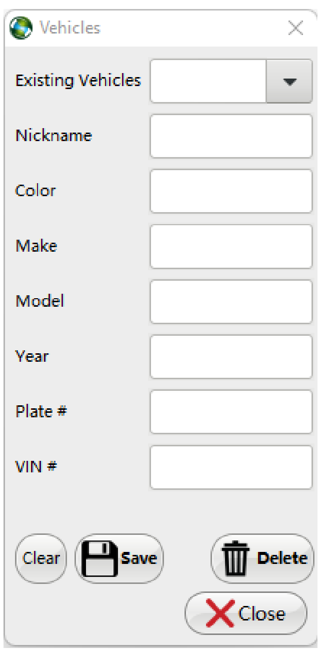
Summary: How to set up vehicles and drivers to perform transfers

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

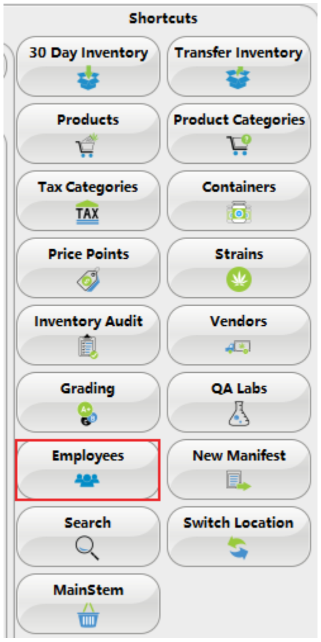
To perform a transfer, you will need to have your vehicle(s) and driver(s) set up in your BioTrack Commercial system.

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.

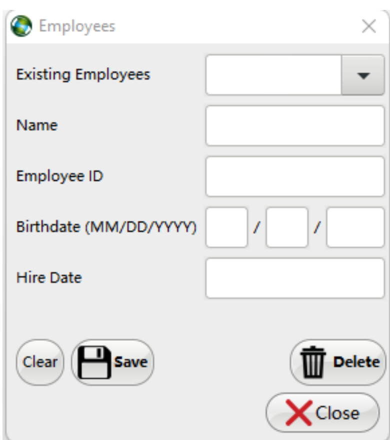




There are two options to add Employees to your system. You can access from the **Compliance** menu → ***Employees***, or by selecting **Employees** from the right-hand side under Shortcuts.



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



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

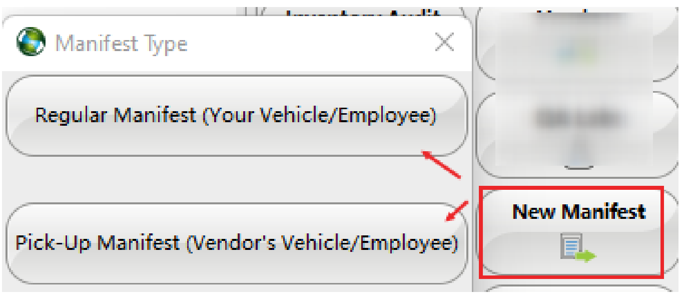
Title: Creating a Manifest

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

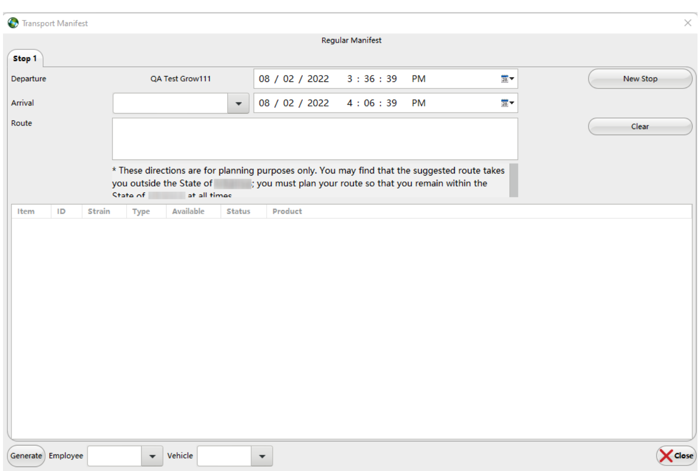
Tags: Manifest, New Manifest, Regular Manifest, Pick-Up Manifest, Pick Up Manifest, Vehicle, Driver, Commercial

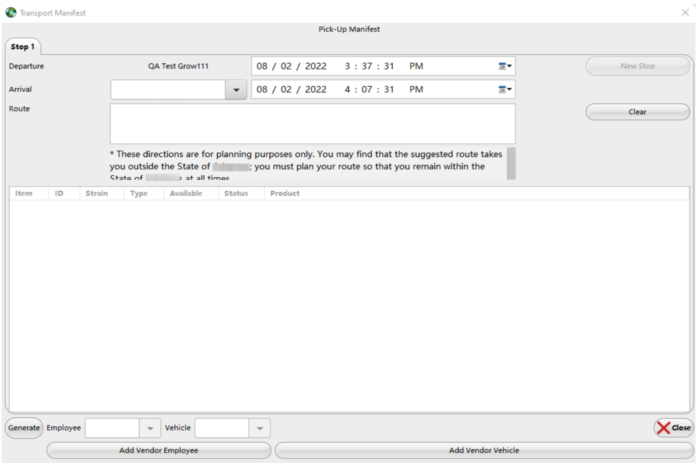
From the **Inventory** tab, select **New Manifest** on the right-hand side under Shortcuts. This will bring up the *Manifest Type* window with two options: Regular Manifest and Pick-Up Manifest.

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



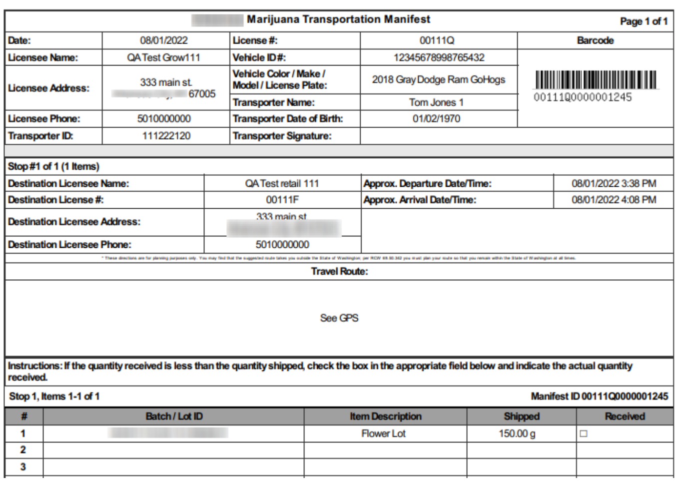
Both the Regular and Pick-Up Manifest creation look basically the same. The difference is adding your driver and vehicle that you have on file versus adding the vendor vehicle and driver.





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 <u>Departure Date/Time</u> and approximate <u>Arrival Date/Time</u>. Your <u>Travel Route</u> 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#:**	12345678998765432	00111Q0000001245
Licensee Address:	333 main st. 67005	**Vehicle Color / Make / Model / License Plate:**	2018 Gray Dodge Ram GoHogs	
		Transporter Name:	Tom Jones 1	
Licensee Phone:	5010000000	**Transporter Date of Birth:**	01/02/1970	
Transporter ID:	111222120	**Transporter Signature:**		

Stop #1 of 1 (1 Items)

Destination Licensee 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 Licensee Address:	333 main st		
Destination Licensee Phone:	5010000000		

Travel Route:

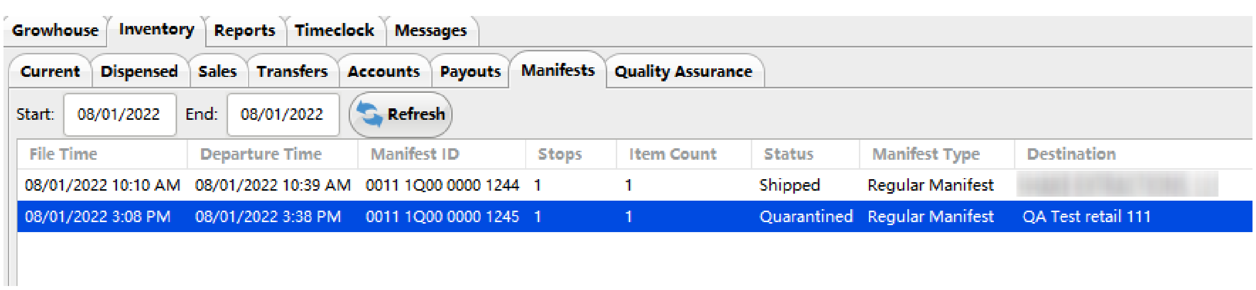
See GPS

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.

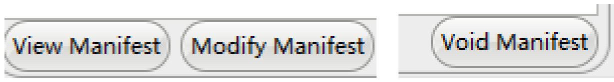
Stop 1, Items 1-1 of 1 — **Manifest ID 00111Q0000001245**

#	Batch / Lot ID	Item Description	Shipped	Received
1		Flower Lot	150.00 g	☐
2				
3				

From your **<u>Inventory</u>** tab → **Manifests** tab, you can see all "Shipped" and "Quarantined" manifests. Items that are Quarantined can be found in your Quarantine Room.



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

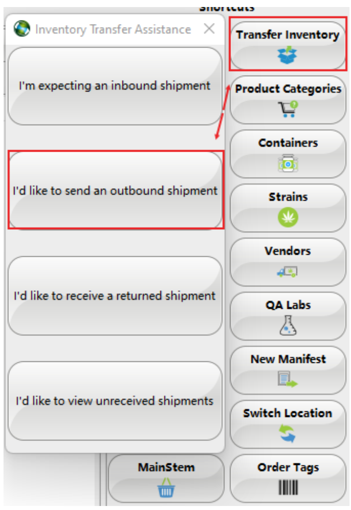
Title: Transferring a Manifest

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

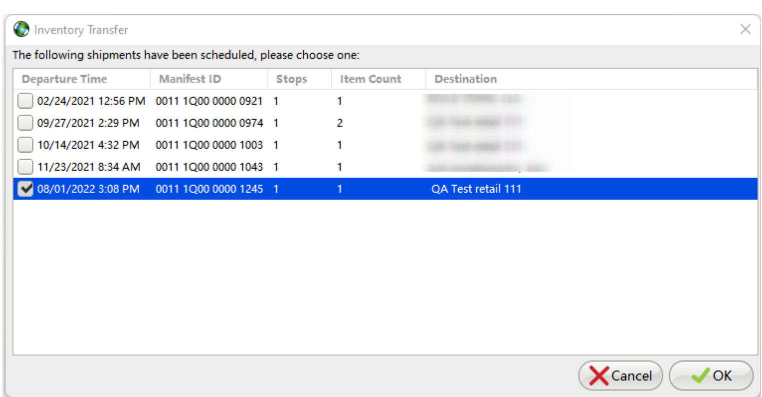
Tags: Transfer Inventory, Transfer Manifest, Transfers, Outbound Shipment, Commercial

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

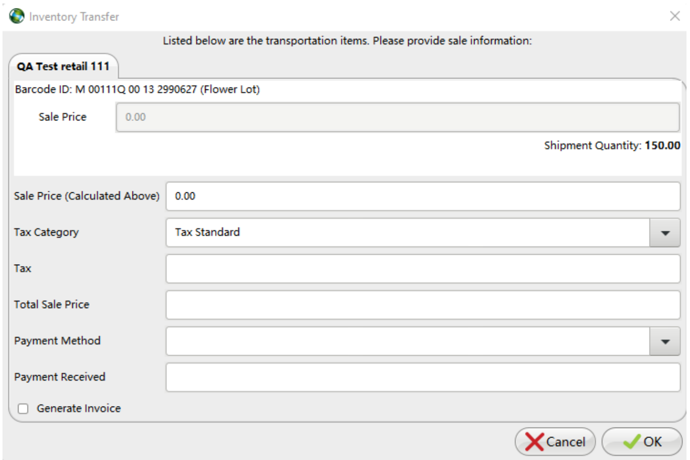
To transfer your manifest, select **Transfer Inventory** from the Shortcuts on the right-hand side of your **<u>Inventory</u>** tab. Once the *Inventory Transfer Assistance* window appears, you will select “I’d like to send an outbound shipment.”



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.

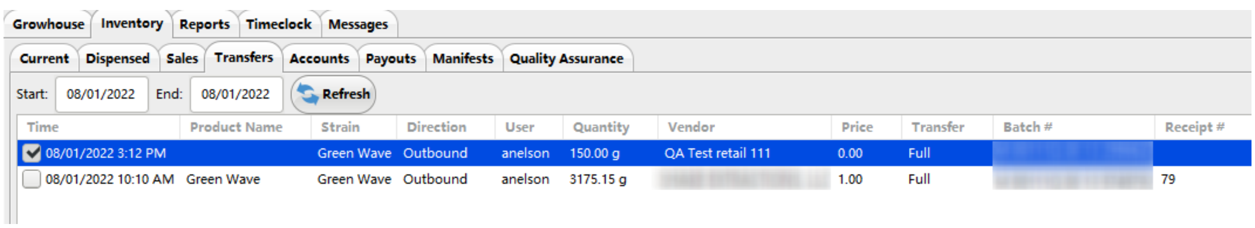


The price entered is the overall cost. For example, 100 Prepacks sold for $500. You will do this for EVERY line item on the manifest.



[*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.



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

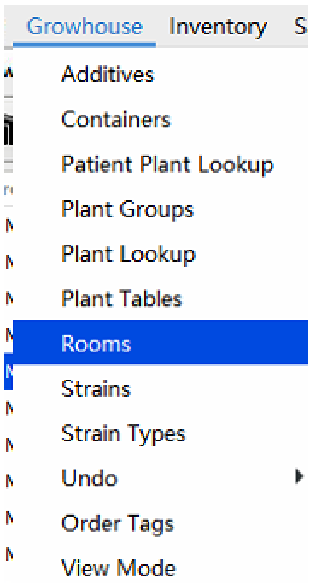
Video: Transferring a Manifest

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***.

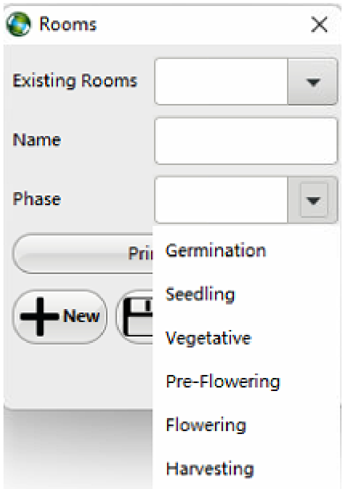


From the *Rooms* window you can Add, Modify or Delete a room. Rooms can be created and named however you choose. Please see some common examples below.

- 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.

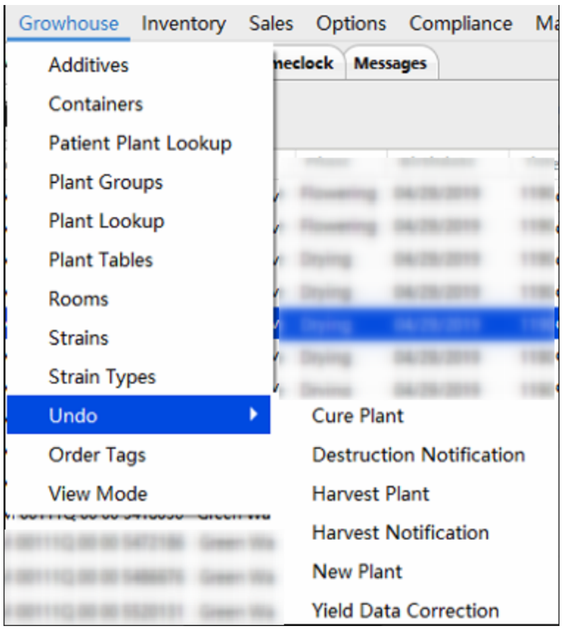

Rooms
Existing Rooms
Name
Phase
Germination
Seedling
Vegetative
Pre-Flowering
Flowering
Harvesting
New

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.

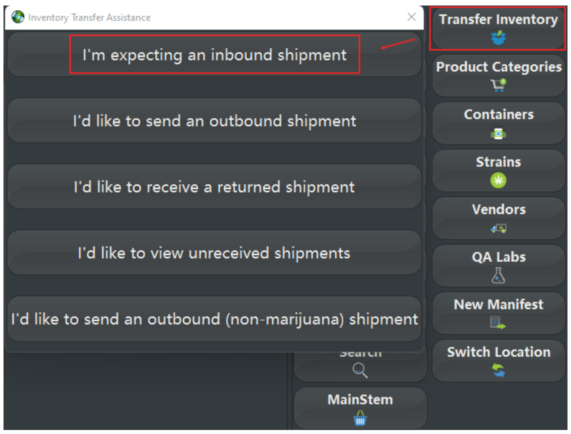
Troubleshooting: If any of these undo options do not work, it means you either waited too long (about 14 days), made too many modifications, or the action is blocked and you will need approval from the State. Once you receive State approval, please send it to BioTrack for correction.

Title: Accepting Inbound Transfers

Summary: How to accept inbound transfers into inventory

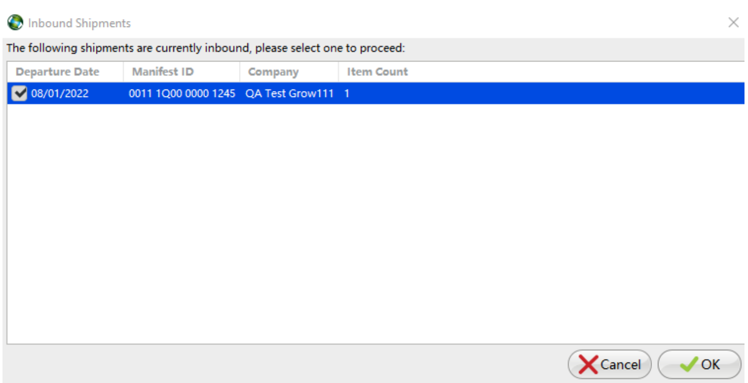
Tags: Transfer Inventory, Inbound Transfer, Inbound Transfers, Transfers, Transferring, Inbound Shipment, Commercial

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.

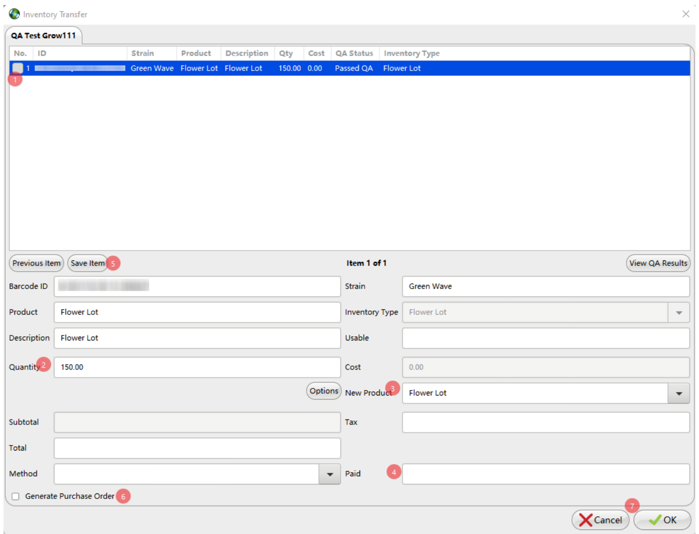
First, select the correct shipment by checking the box to the left and clicking "OK."



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 <u>Quantity</u> 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.

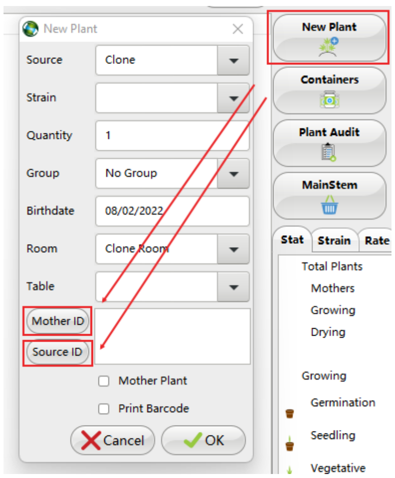


Title: Creating New Plants

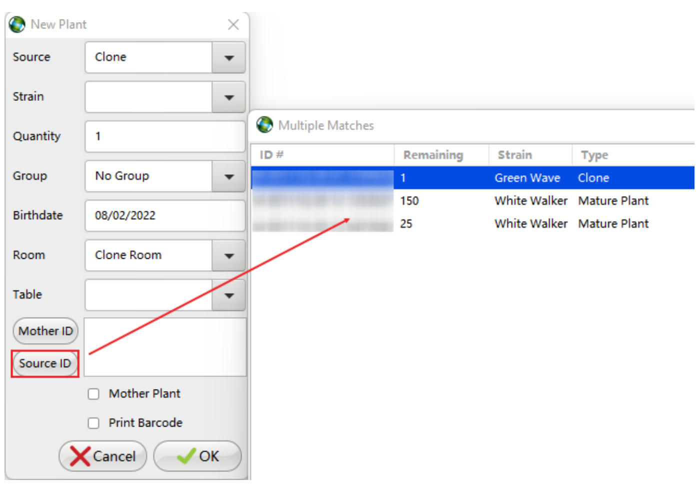
Summary: How to create a new plant via Source ID or Mother ID, The purpose of a Mother Plant

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

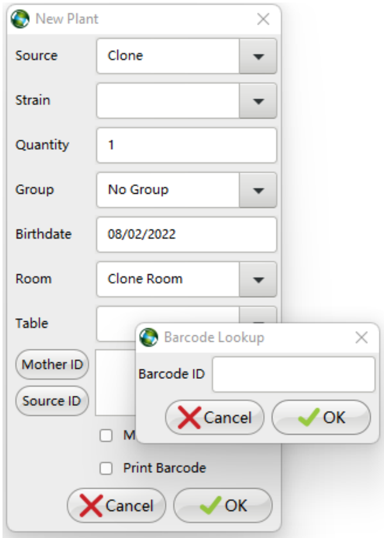
Assuming you have taken in plants/seeds during your window, these plants will be located in your inventory. To get them into your Growhouse, select **New Plant** on the right-hand side under Shortcuts and then select "Source ID" to source from your inventory or "Mother ID" to clone from another plant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



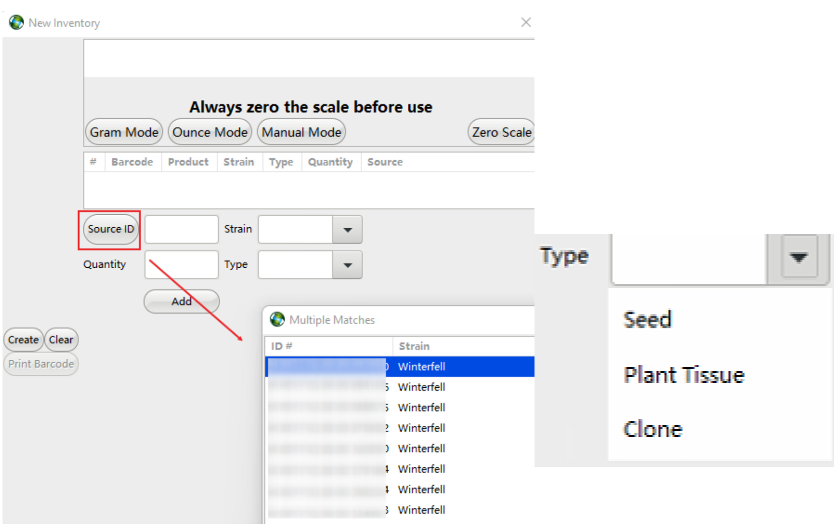
- Select "Source ID," and this will display all of your eligible inventory within your Inventory tab, meaning all the clones, seeds, and mature plants you either created via the inventory window or received via an inbound transfer.



- 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.



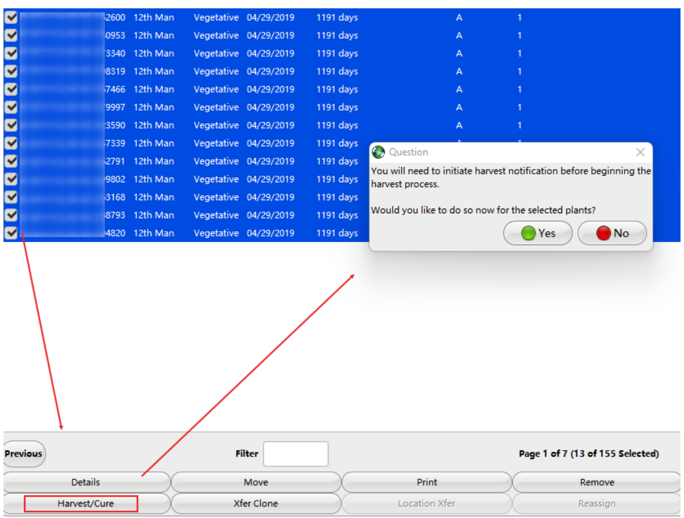
Title: Harvesting Plants

Summary: How to harvest plants

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

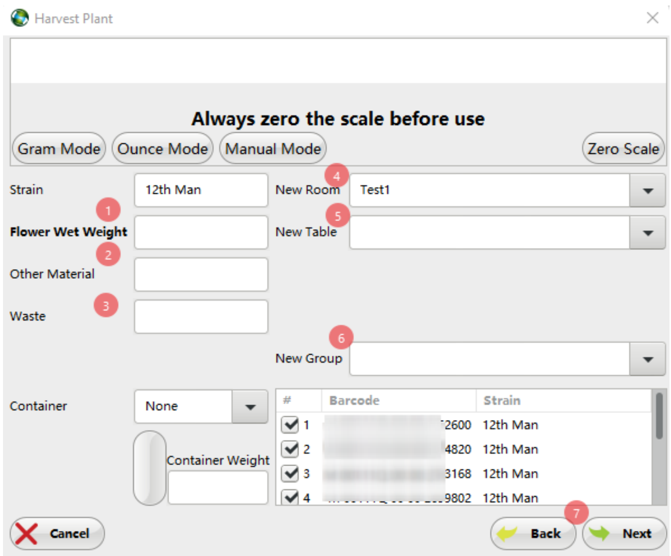
When it's time to harvest your plant(s), you'll need to select the plants of the same strain and initiate the harvest.

- 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
Zero Scale
Strain
12th Man
Flower Wet Weight
Other Material
Waste
New Room
Test1
New Table
New Group
Container
None
Container Weight
#
Barcode
Strain
1
2600
12th Man
2
4820
12th Man
3
3168
12th Man
4
9802
12th Man
Cancel
Back
Next
1
2
3
4
5
6
7

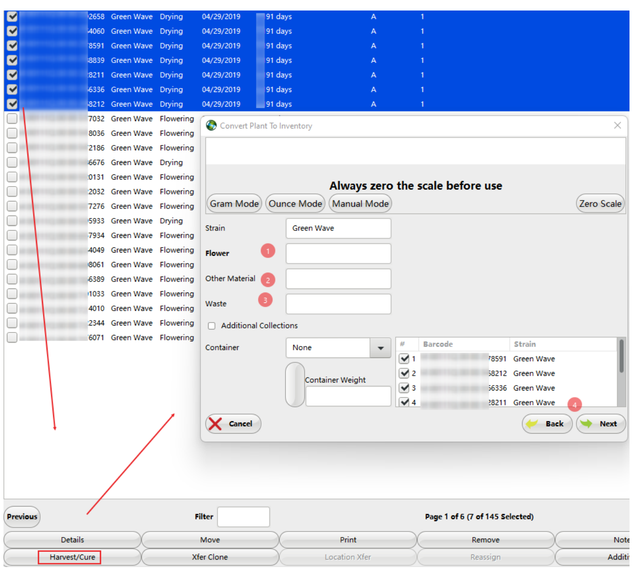
Title: Curing Plants

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.

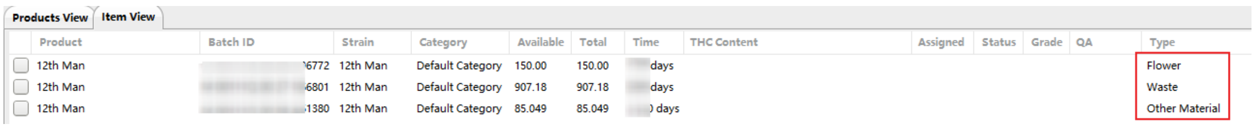
Important Note: Waste will need to be marked for destruction. Follow the instructions in the *“Collecting Waste”* article.

Title: Creating a Lot

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

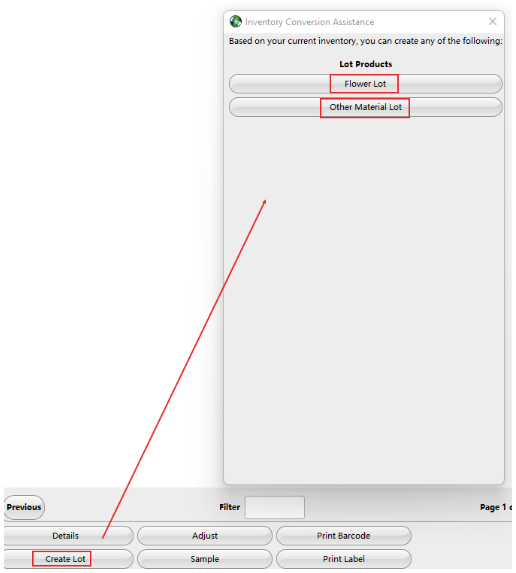
Tags: Lot, Lots, Create Lot, Flower Lot, Other Material Lot, Batches, Commercial

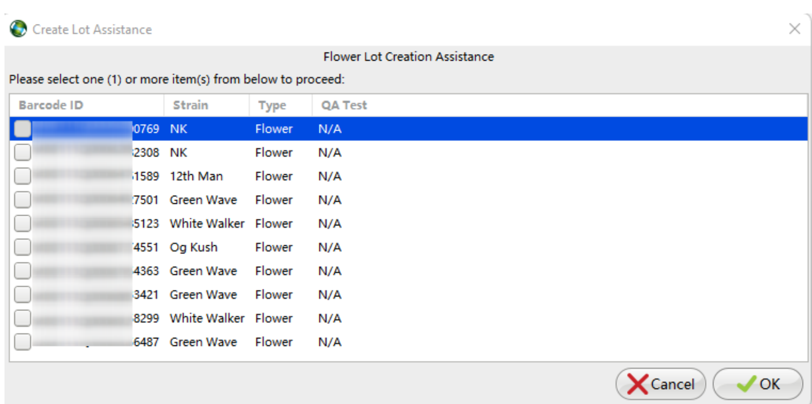
Creating a lot is something you will need to do after the cure process. At this point you will have “Flower,” “Other Material,” and possibly “Waste.”



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.

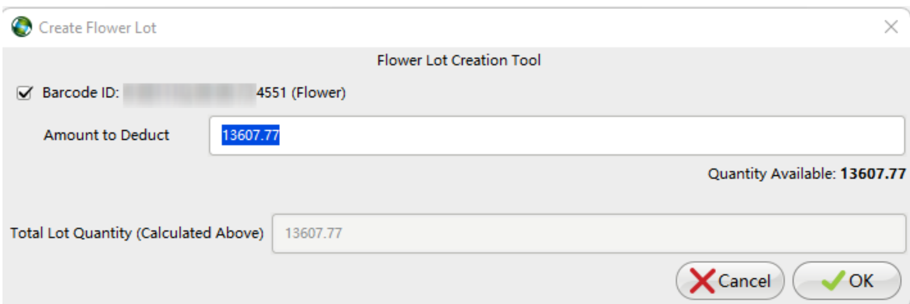




You can use multiple “Flower” batches to create a single Flower Lot as long as it's all the same strain.

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.



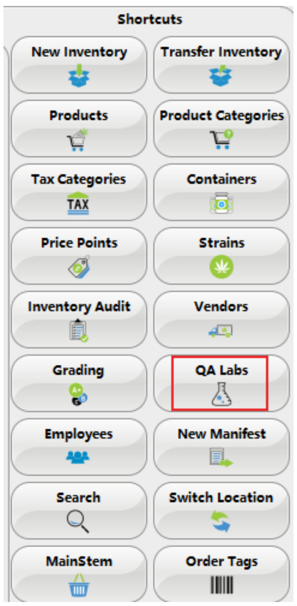
Video: Creating a Lot

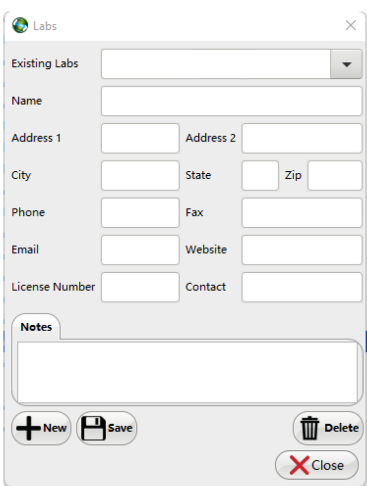
Title: Pulling QA Samples

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.

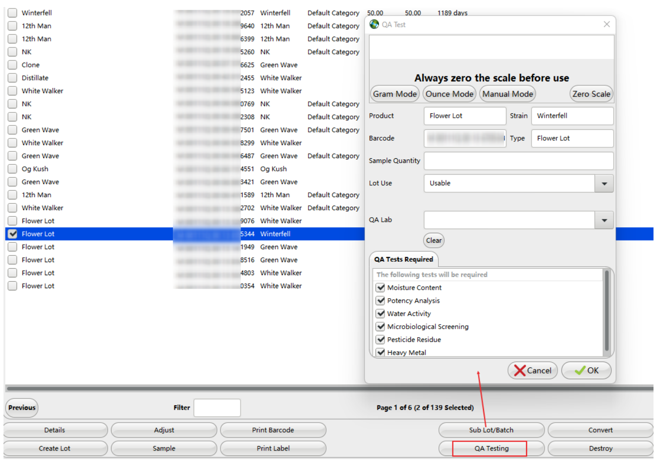




Important Note: Labs are different from Vendors. You will manually enter the QA Lab information. If you are unsure if you have the correct information, you can call BioTrack.

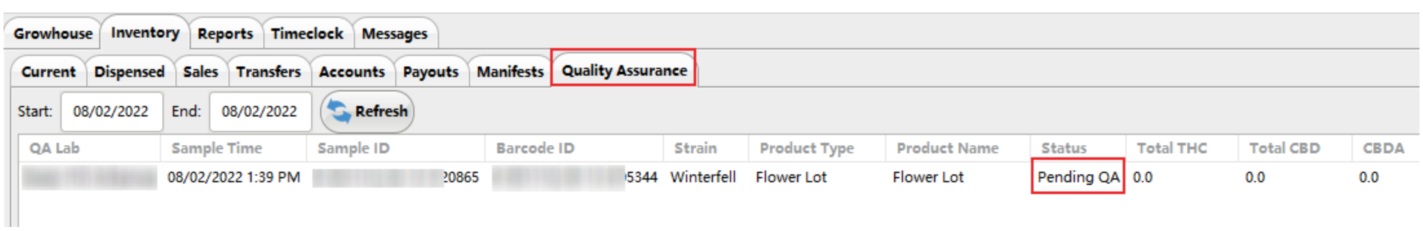
- First, select the item you want to test. (*Note*: Other Material Lots cannot be tested. These can be manifested and transferred without QA results and that is because they're intended for processors who will convert to intermediate products and test them.)

- 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.)



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

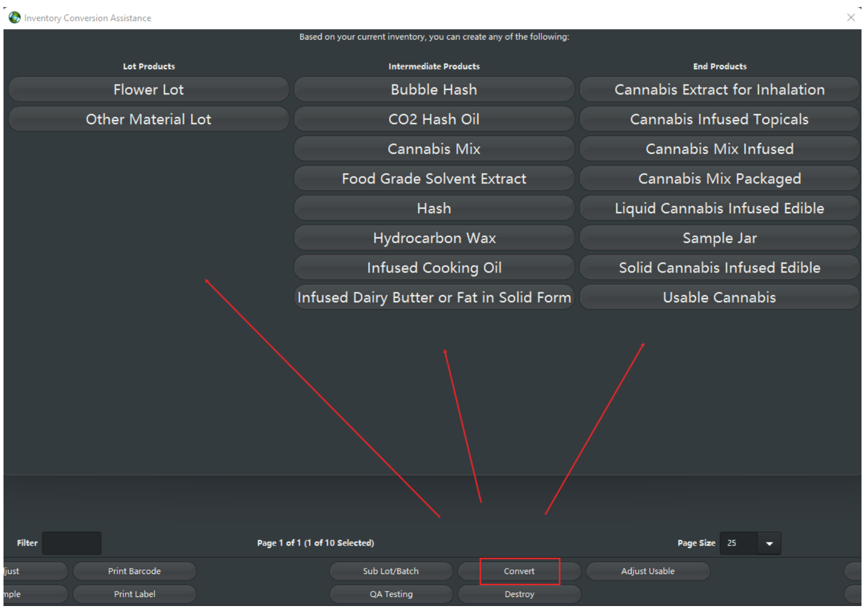
Summary: How to convert inventory, What conversions are permissible

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

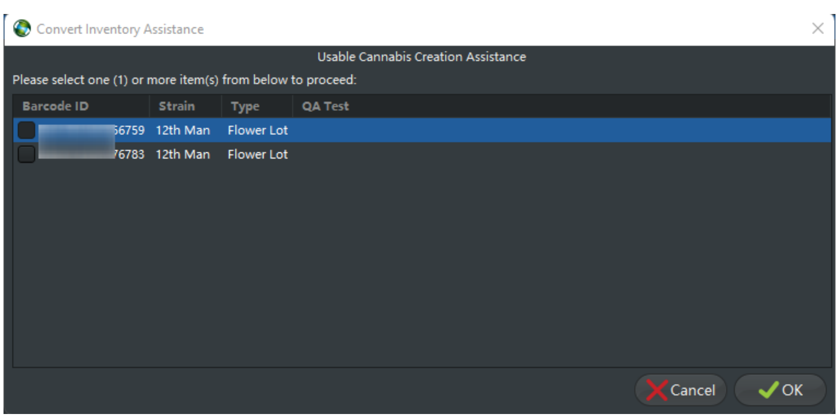
When converting, you have your beginning Lot products, Intermediate products, and End products.

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).

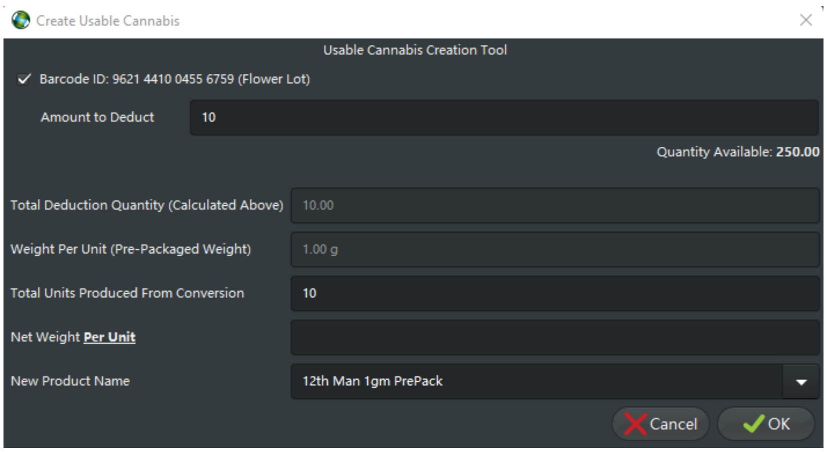
Once you select “Convert” at the bottom of the screen, you can then choose the beginning Lot product you want to use. In this example, we are using Flower Lot and converting it to the End product of Usable Cannabis.



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.



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

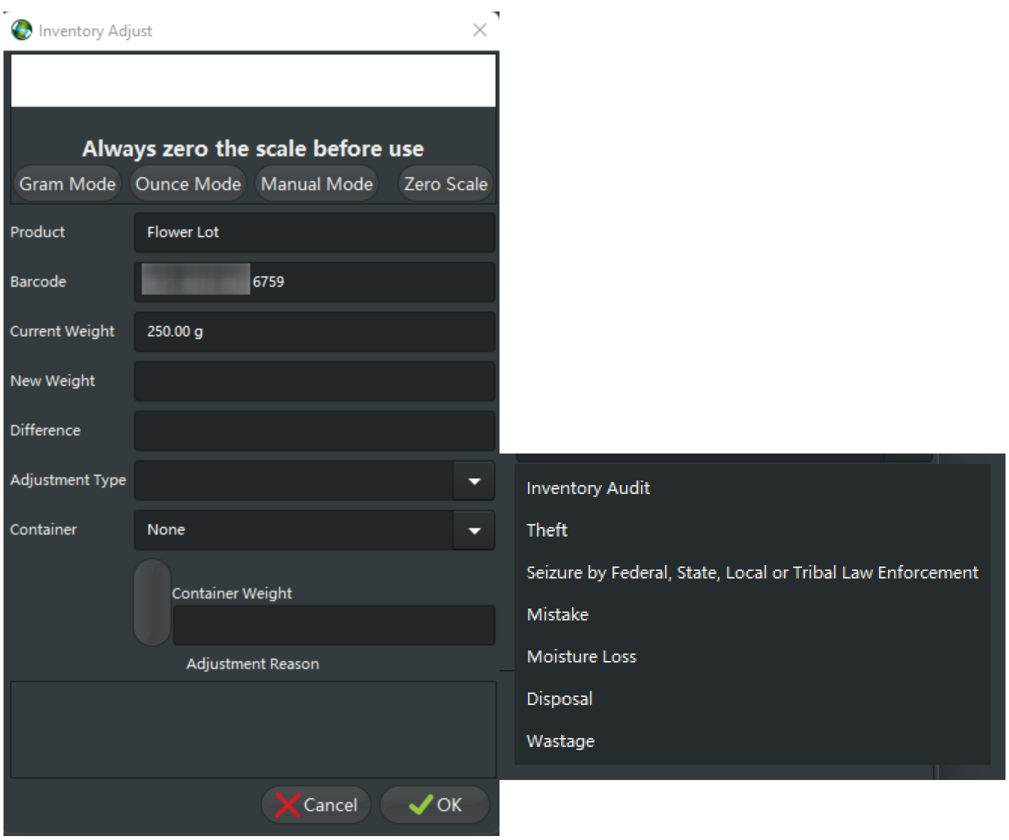
Tags: Inventory, Adjustment, Adjustments, Adjust, Commercial

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.



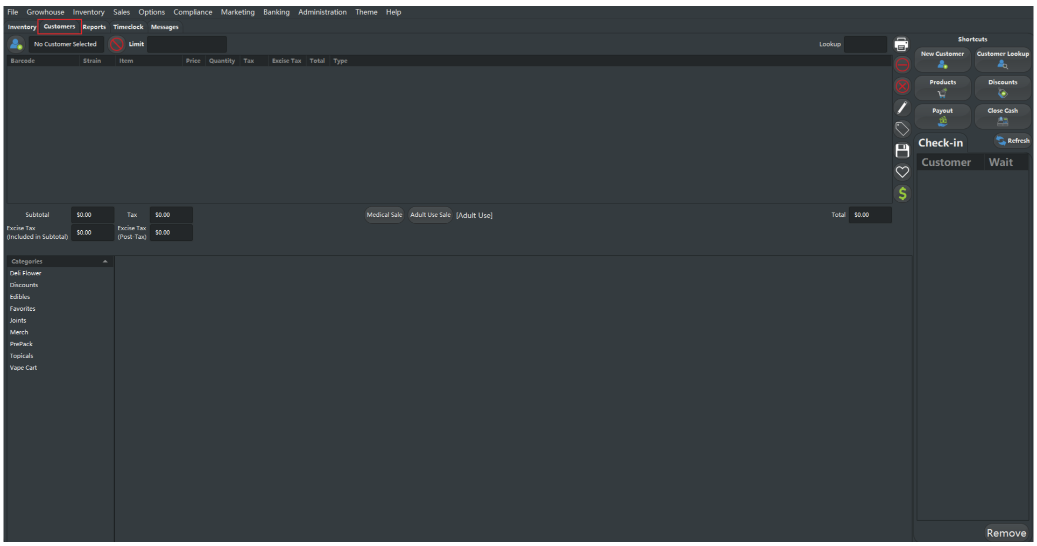
Important Note: At any point, if you feel unsure about making an adjustment, please contact the State for approval.

Title: Navigating the Point of Sale

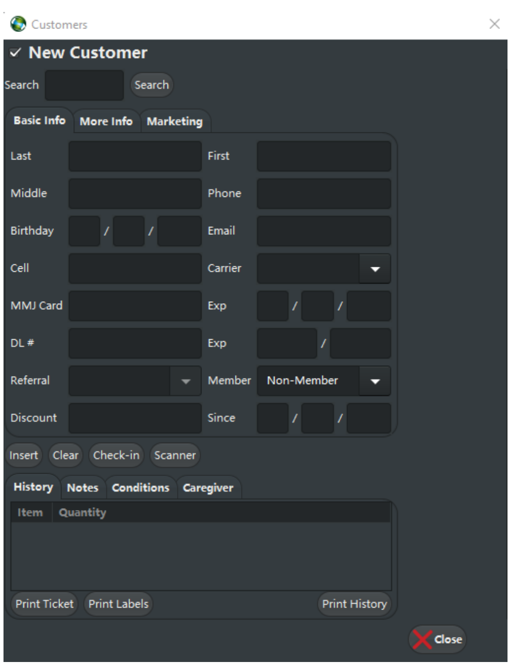
Summary: An overview of the Point of Sale features, How to complete a sales transaction

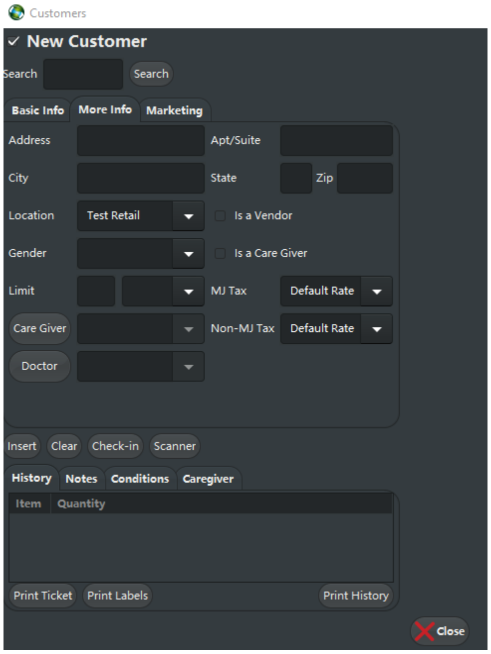
Tags: Sale, Sales, Customers, Customer, Profile, Card, ID, Lookup, Pay, Payment, Commerical

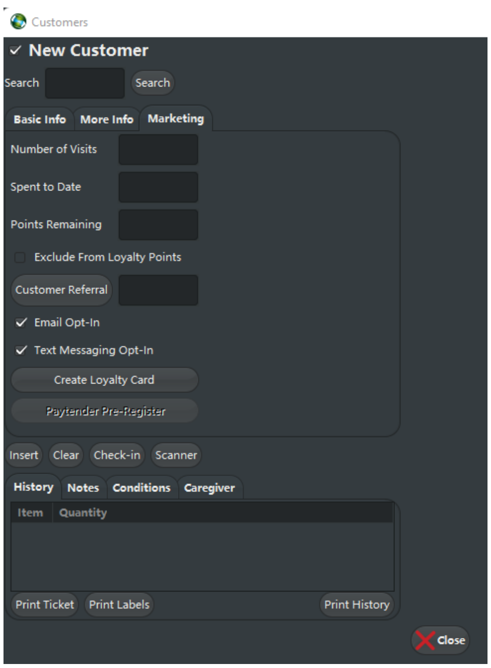
The **<u>Customers</u>** tab is your Point of Sale where the bud tenders will create new patient/customer profiles, check in patients/customers, and sell the product.



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 <u>Search</u>.





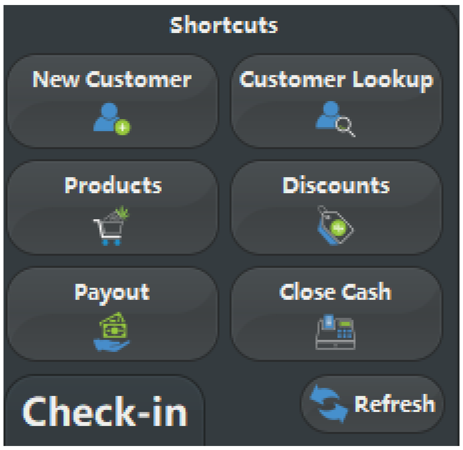


Important Note: You do not have to create a profile for Adult Use customers unless you want to. Furthermore, some States do not permit the creation of Adult Use customers so please refer to your State regulations.

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.

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

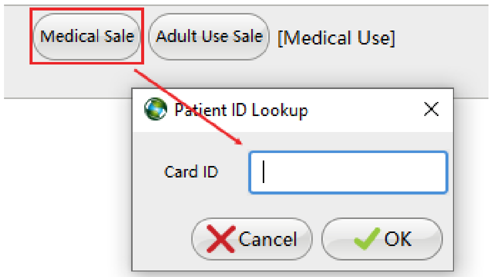
New Customer = Create a new patient/customer profile
Customer Lookup = Look up existing patients/customers. You can modify the profile after lookup.
Products = Access your product build to modify your products
Discounts = Add, modify or delete Discount programs
Payout =Allows you to take money out of 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.



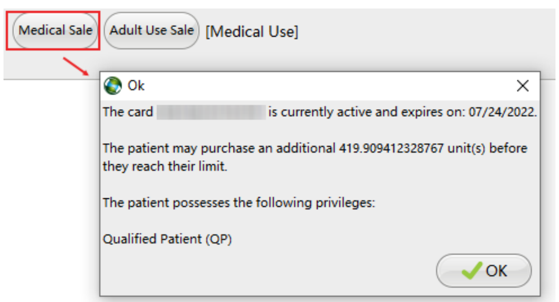
To the left of Shortcuts, you will see a vertical ribbon of action buttons related to making a sale. From here, you can do the following.

- 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.



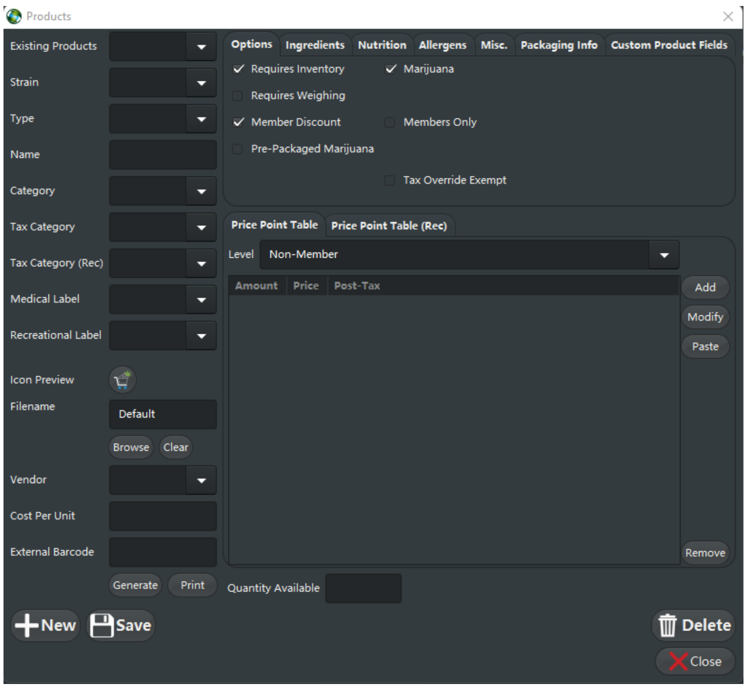
The *Pay* window below is the pay tender screen. You have a few options to enter the price. You can type the price in, click on the number pad, or click on the bills/change. You can also split transactions if needed. Once finished, your till will pop, receipts and labels will print, and the customer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

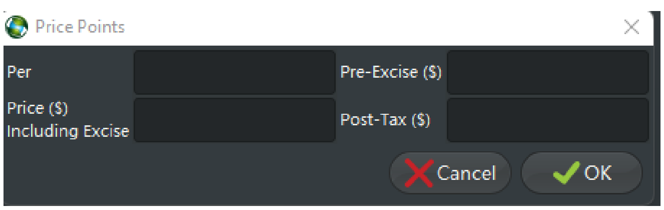


- Strain - You can associate the strain to the product. This is optional and not needed for non-marijuana items.
- Type - This refers to your inventory type. When you take in a product its inventory type is set and should match the inventory type on this screen.
- Name - You can name your product whatever 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.

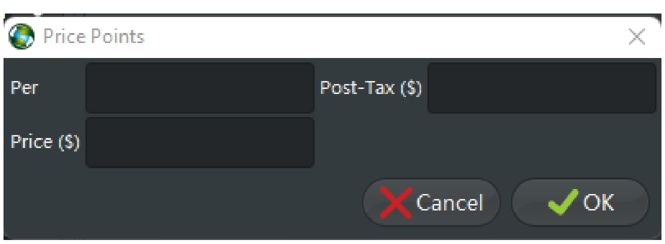
Rec (Adult Use) pricing

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

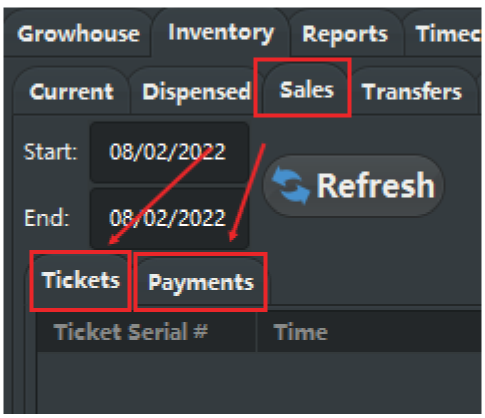
Summary: How to refund an item, When and how to void a sale

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

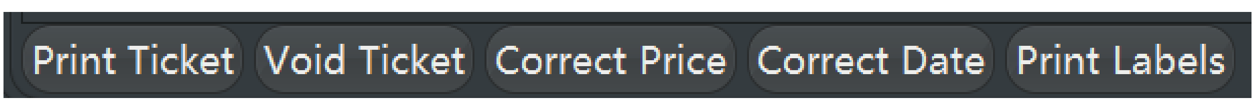
It may become necessary to process a refund and/or void after a sale. Voiding a sale makes it so it never happened; however, there is a report available. Refunding allows you to refund items on the ticket.

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.

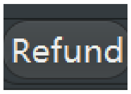


From the **Tickets** tab you can find sales tickets from a specific date or date range allowing you to see the items sold (Quantity) and who purchased them. At the bottom of the screen, you will find a few additional actions you can perform.



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.

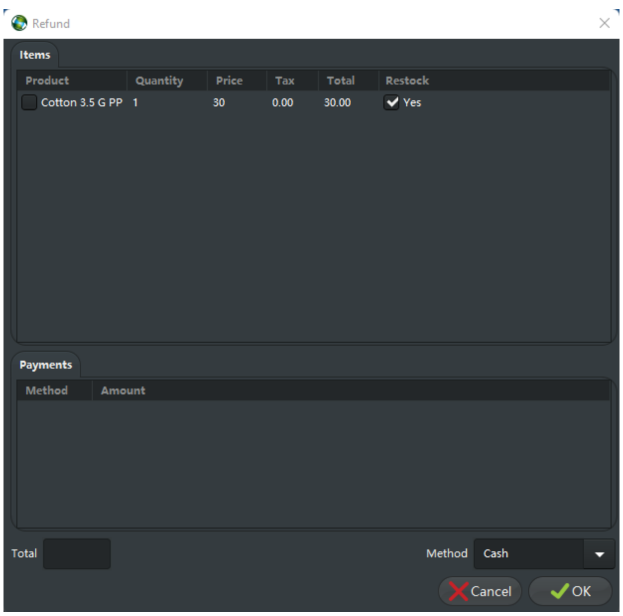


Refund will allow you to select the sales ticket and move forward with a refund.

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.



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

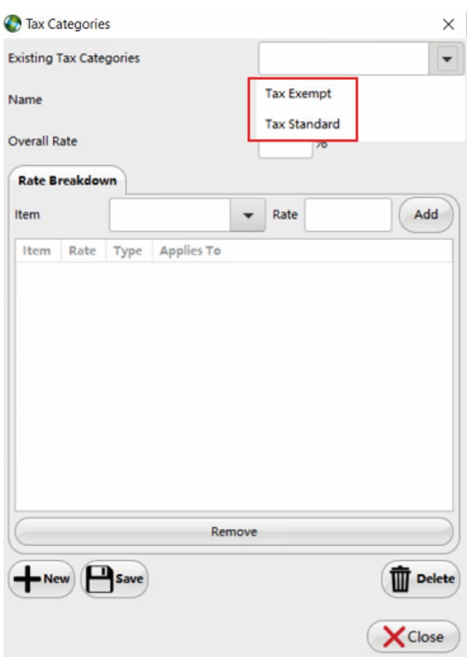
Tags: Tax, Tax Category, Tax Categories, Taxes, Exempt, Standard, Excise, Commercial

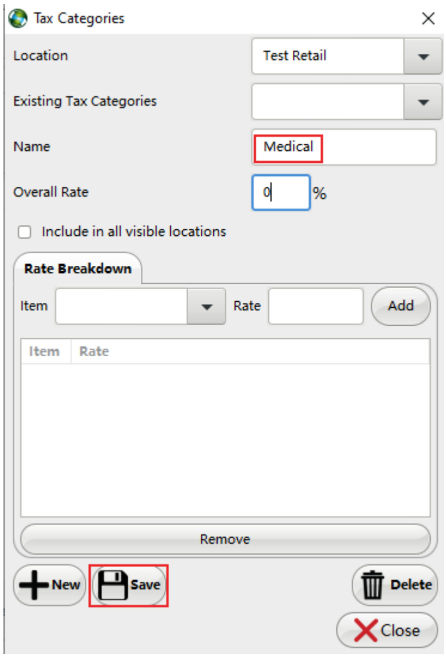
Whether your State allows for Medical, or Medical & Recreational sales, you will need to make sure things are correct in your BioTrack Commercial System.

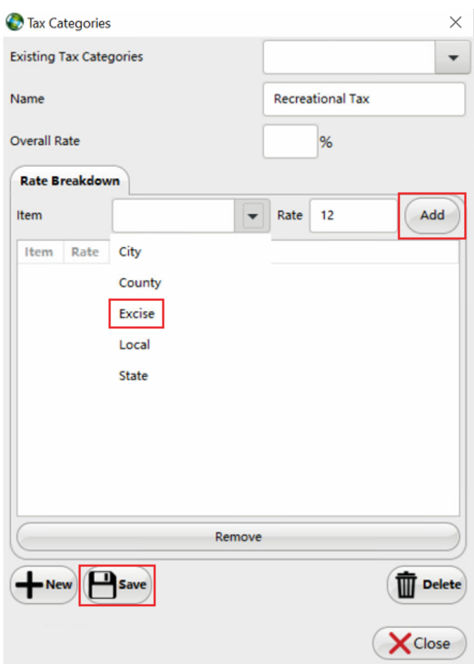
You will need to set up or update your Tax Categories, Product build, and verify other system options. In BioTrack, you will always see Tax Exempt and Tax Standard. Depending on how you want it set up, you may need to add a Medical Tax category and/or a Recreational Tax category. These Tax Categories 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.

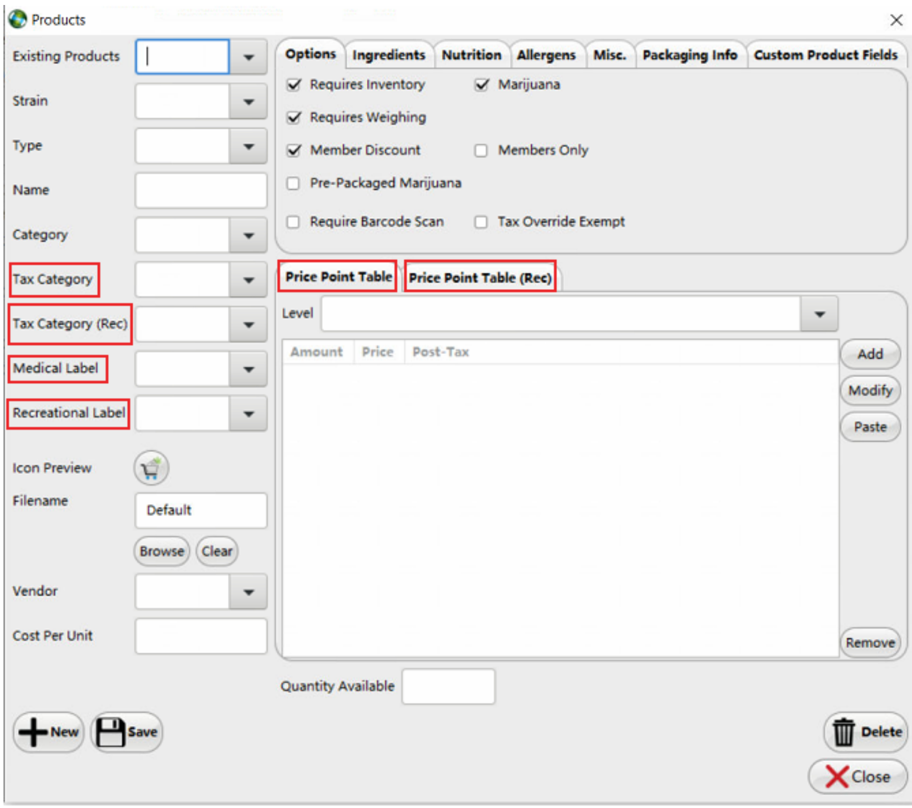






Shown below is your *Products* window, which determines your product name, taxes, categories, labels, and price points. There is no need to add more products to your system. From this window, you can set the Tax Category for Medical and Recreational items, select Labels for each, and set up different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



Title: Enabling Delivery Module

Summary: How to enable delivery capabilities within the BioTrack System

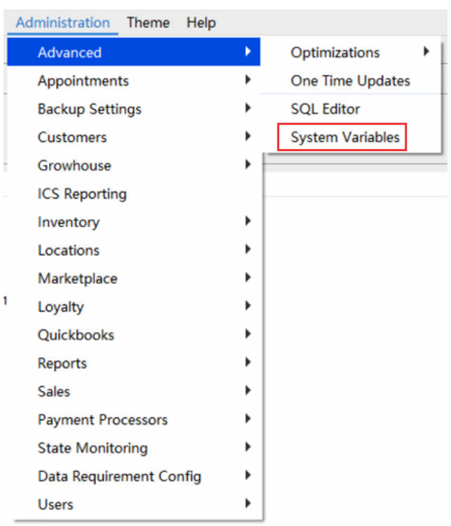
Tags: Delivery, Pickup, Pick-up, Delivery Module, Delivery Management, Commercial

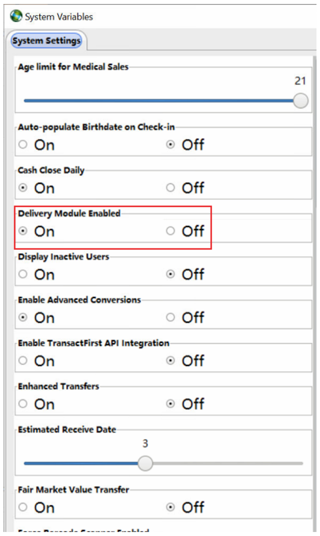
For retailers that are able to make deliveries, you will want to enable the Delivery Module within your BioTrack Commercial System. This feature allows you to complete Delivery and Pickup sales for both Medical and Recreational customers. In order to turn on this option in your system, take the following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

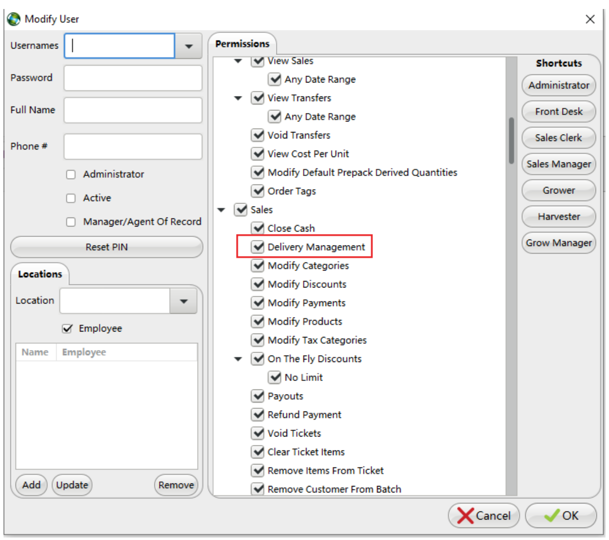
- Go to the **Administration** menu → ***Advanced*** → ***System Variables***.
- Select “On” for Delivery Module Enabled.
- Click “OK” or “Save”.
- Log out of BioTrack and then back in.

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
Usernames
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

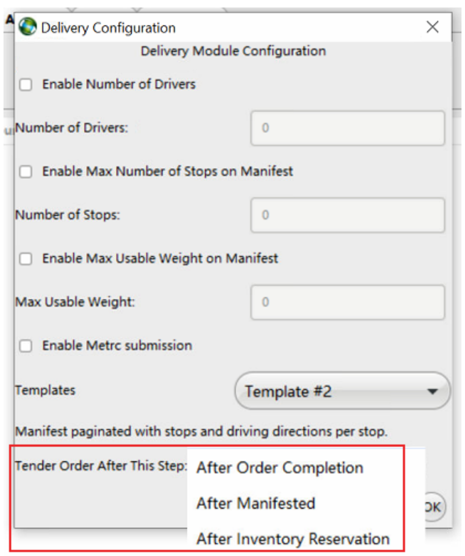
Title: Setting up Sales for Delivery and Pickup

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

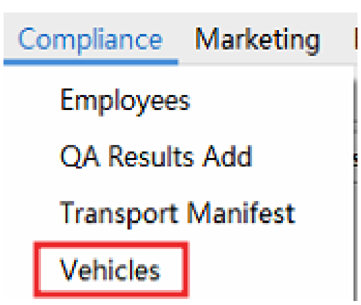
Tags: Delivery, Deliveries, Pickup, Pick-up, Delivery Configuration, Drivers, Employees, Vehicles, Preorders, Commercial

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

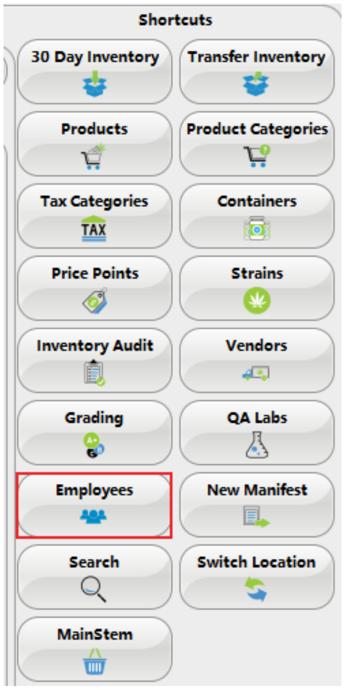
From the *Delivery Configuration* window, set up the Number of Drivers, the Number of Stops, and choose After Order Completion for Tender Order After This Step.



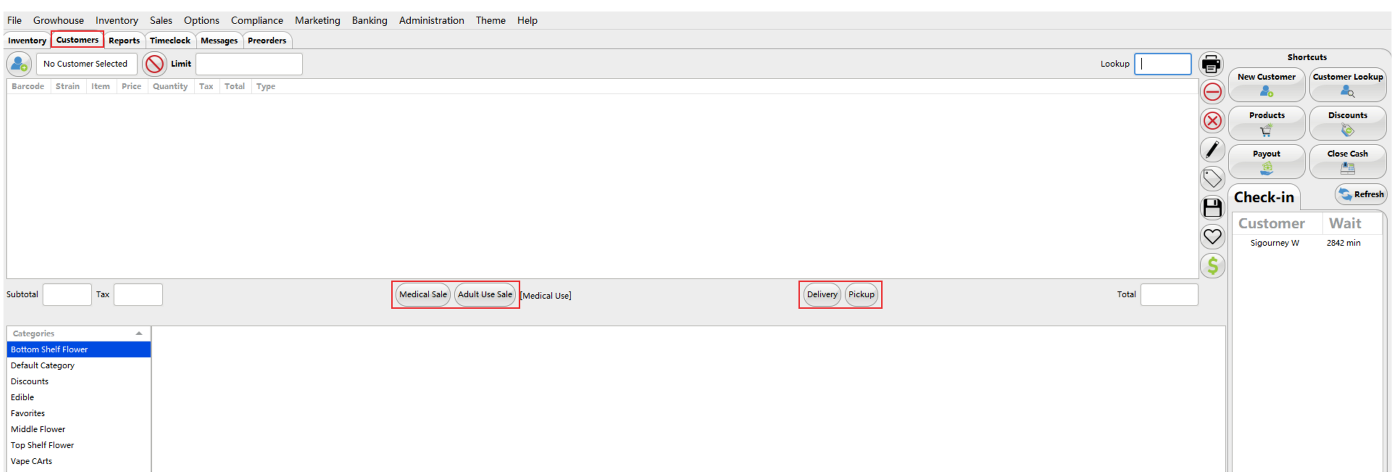
If you do not have any Drivers or Vehicles on file yet, go to the **Compliance** menu → ***Vehicles*** to enter all vehicles that will be transporting products to your customers.



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

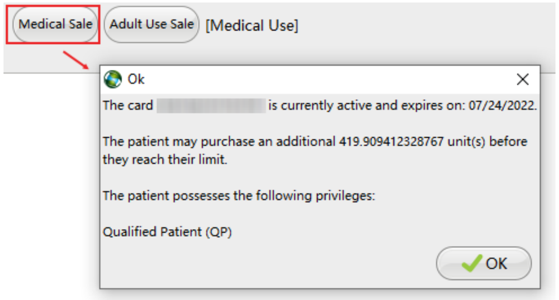


Once the Delivery Module is turned on, you will see a "Medical Sale" and a "Adult Use Sale" button on the **Customers** tab where your sales are processed. To the right you will also see a "Delivery" and a "Pickup" button.



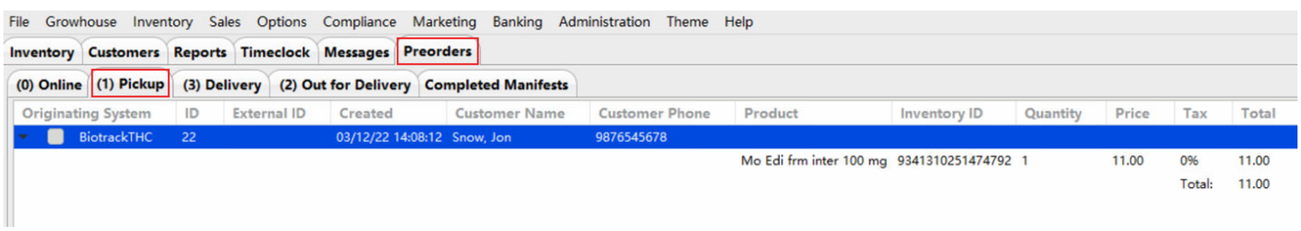
Medical Pickup Sale

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."



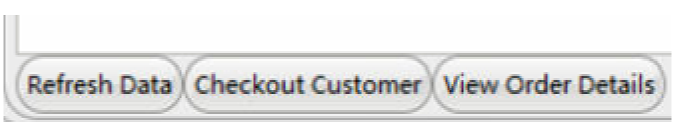
Once the card has been entered and verified, you will receive a prompt for an active or expired card. If active with available limits, click "OK" and add the items to the cart by scanning, clicking, or searching from the Lookup bar. Once items are added to the ticket, click the "Pickup" button. Select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

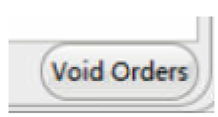
After you confirm the Pickup, it will reserve your inventory and move the ticket under the **Preorders** tab → ***Pickup***.



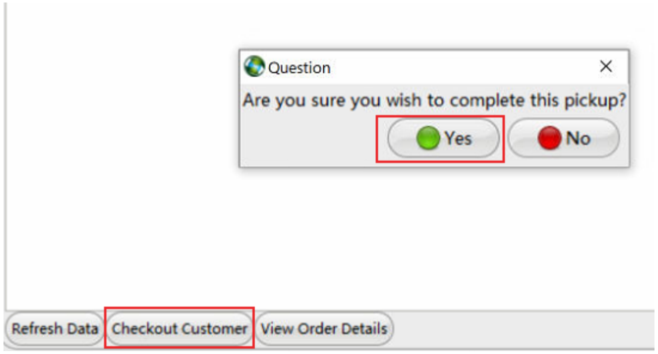
At the bottom of the Pickup screen you'll see additional action options.

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





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

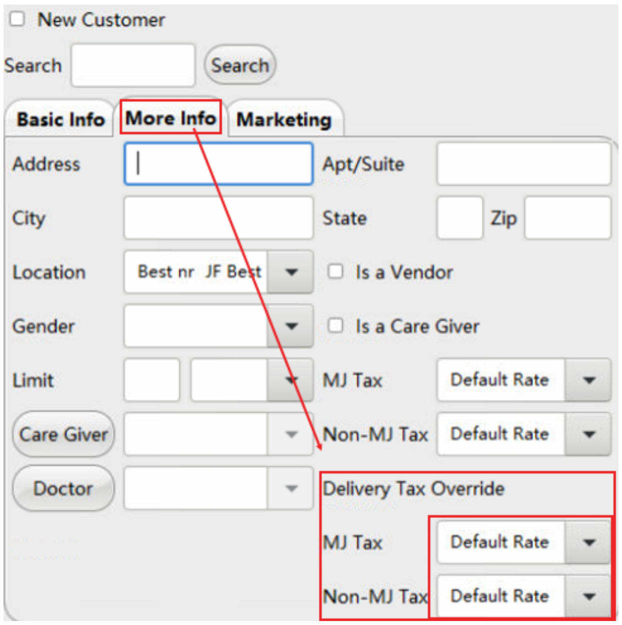


After clicking "Yes" to confirm, your *Pay* tender window will appear allowing you to select the type of payment taken. Once entered, the sale will be complete and you can move onto another Pickup or standard sale.

Adult-Use Delivery Sale

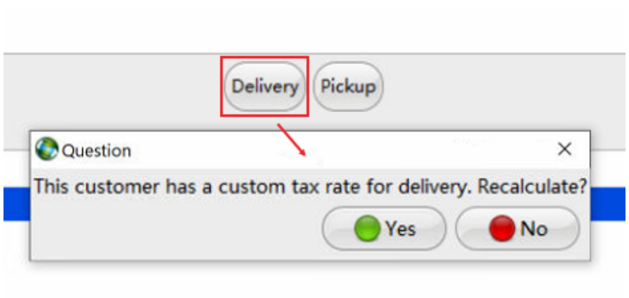
With Tax Categories created for other City/County tax rates, you will be able to assign a custom Tax Category to the Customer's Profile depending on where they live. This tax will be charged when a delivery is made and will be based on their City/County rate(s).

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.

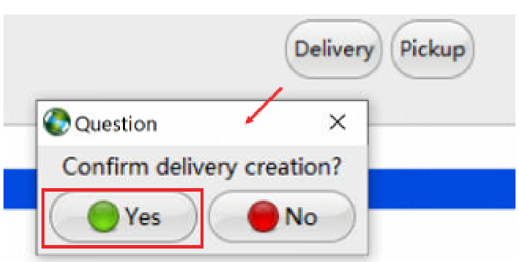


Important Note: Please check your State regulations for tax information and breakdown.

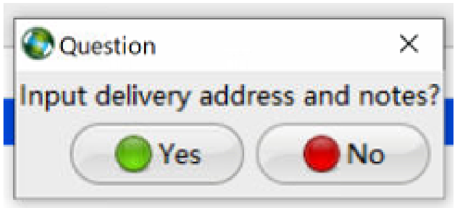
You will still check-in the Customer, select “Adult-Use Sale,” and add the items they are purchasing to the cart. Then click the “Delivery” button.

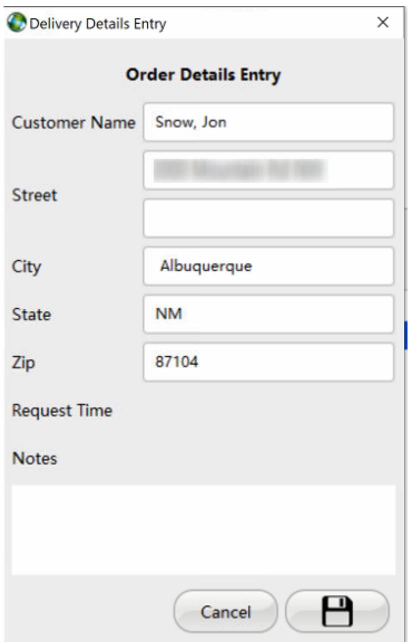


After selecting “Yes” to confirm recalculation of the tax rate for delivery, it will then ask you to confirm delivery creation. Click “Yes.”

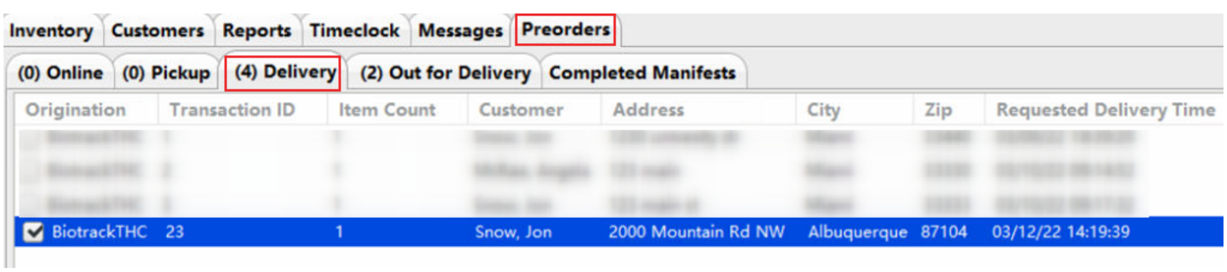


Once the delivery creation is confirmed, you will be prompted to input the delivery address and notes. Click “Yes” to proceed to the Delivery Details Entry window where you can add or modify the address and any notes.





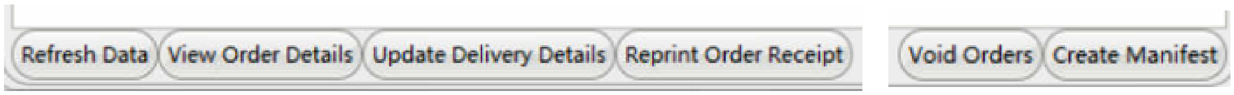
After selecting the disc to Save, the order will be saved and inventory reserved. To locate this ticket go to the **Preorders** tab → ***Delivery***.



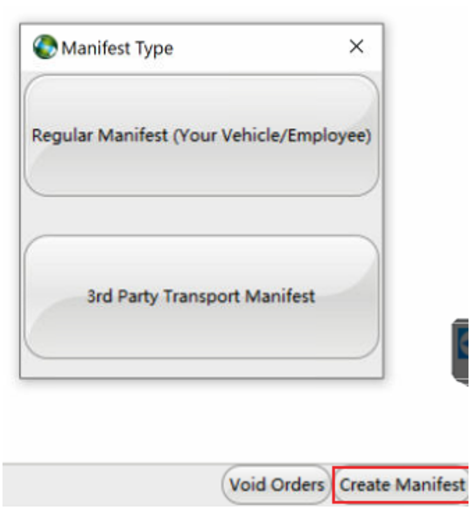
At the bottom of the Delivery screen you’ll see additional action options.

- 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

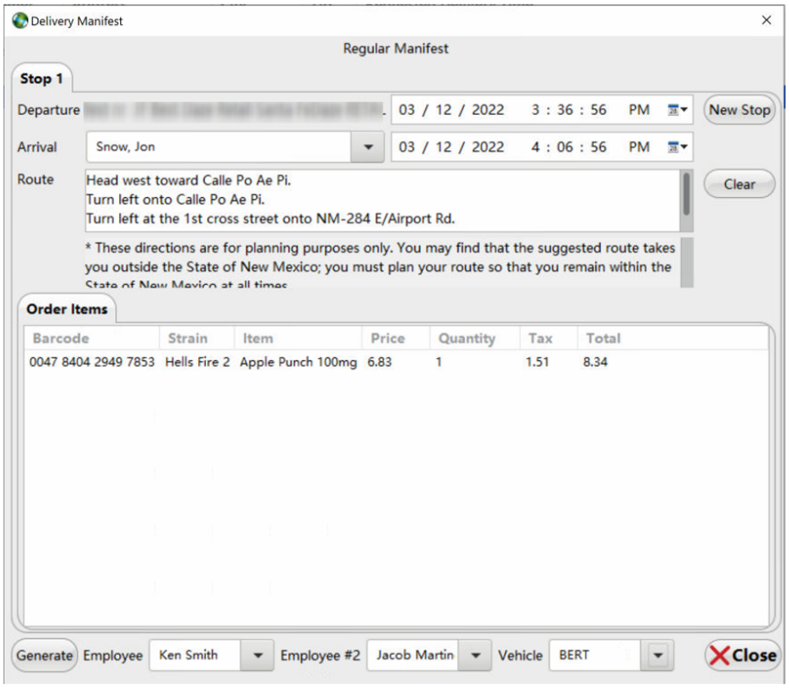


When you select “Create Manifest,” you have the option of Regular Manifest (Your Vehicle/Employee) or 3rd Party Transport Manifest. For 3rd Party Transport, be sure to sync from the **Administration** menu → ***State Monitoring*** → ***Synchronization*** → ***3rd Party Transport***.

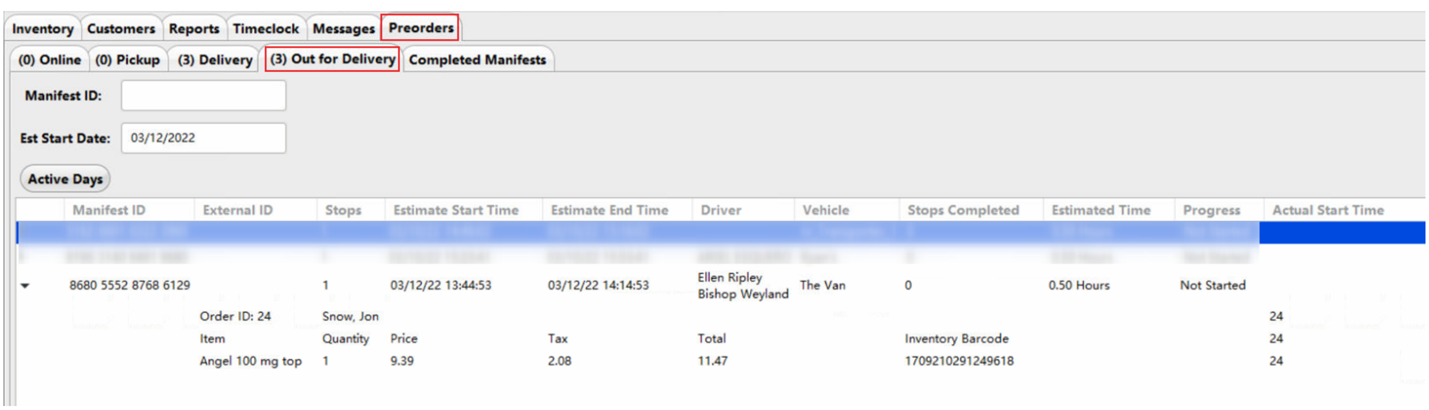


For a Regular Manifest, follow these steps:

- 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”

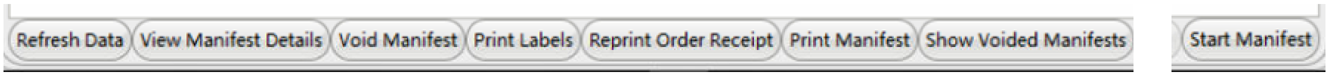


After creating the manifest, the order(s) will be moved to the **Preorders** tab → ***Out for Delivery***.

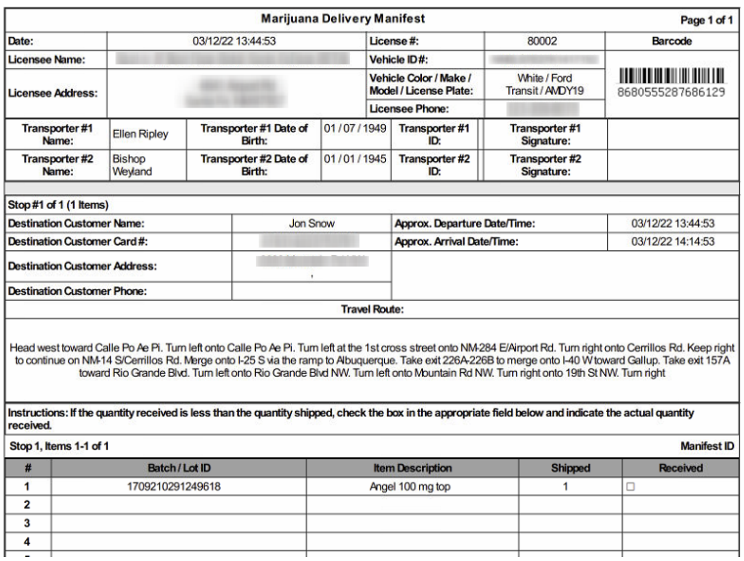


At the bottom of the Out for Delivery screen you will see the additional action options.

- 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:	[illegible]	Vehicle ID#:	[illegible]	8680555287686129
Licensee Address:	[illegible]	Vehicle Color / Make / Model / License Plate:	White / Ford Transit / AMDY19	
		Licensee Phone:	[illegible]	

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 #:	[illegible]	Approx. Arrival Date/Time:	03/12/22 14:14:53
Destination Customer Address:	[illegible]		
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 NM-284 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.

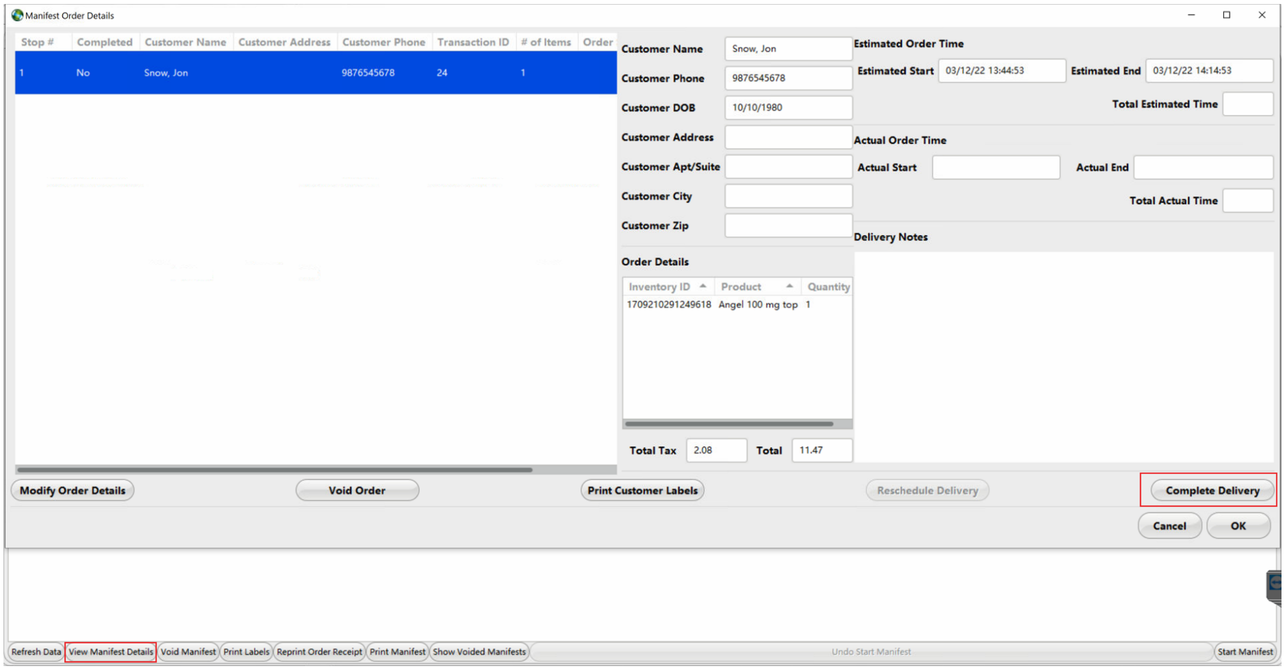
Stop 1, Items 1-1 of 1 — **Manifest ID**

#	Batch / Lot ID	Item Description	Shipped	Received
1	1709210291249618	Angel 100 mg top	1	☐
2				
3				
4				

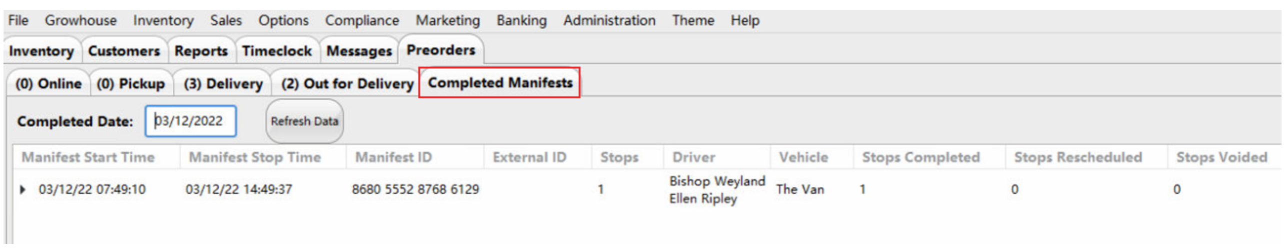
After the delivery is completed, you’ll want to tender the sale by clicking “View Manifest Details.” The *Manifest Order Details* window will appear, where you can perform the following:

- 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.

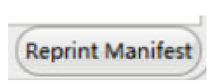


Once the delivery is completed, you can go to the **Preorders** tab → ***Completed Manifests*** to view all completed orders by date.



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

- Reprint Order Receipt
- Reprint Order Labels
- Reprint Manifest



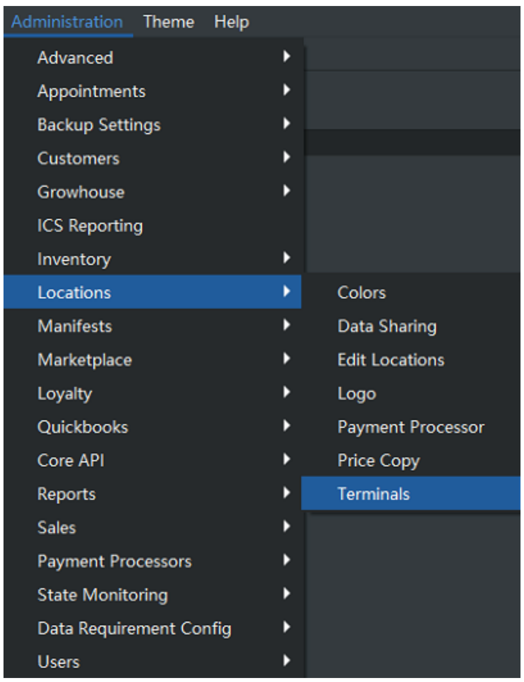
Title: Setting up a Terminal

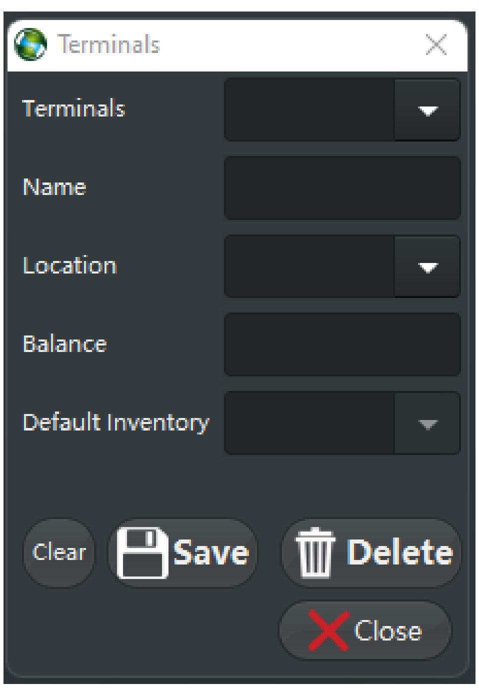
Summary: How to set up a terminal

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***.





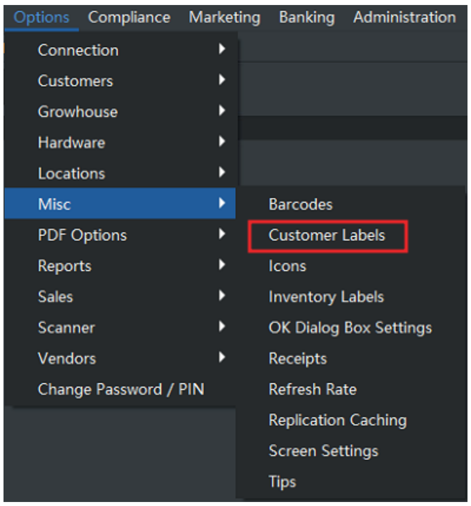
- Click into the Terminals drop down and select Terminal number 1. Once selected, we can assign a Name (instead of just a number) to it. For example, POS1.
- The Location drop down can be used to decide which location, by default, anyone using that terminal logs into. For example, if you have a Growhouse 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.

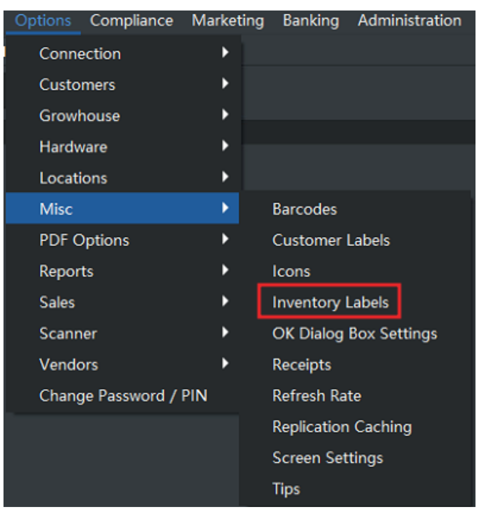
Title: Creating Customer and Inventory Labels

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.