State of Connecticut
Department of Consumer Protection
Drug Control Division
Cannabis Analytic Tracking System

User Guide - Licensee Interface

FORIAN BIOTRACK
800.797.4711
6750 N Andrews Ave, Ste 325Fort Lauderdale, FL 33309
sales@biotrack.com
www.biotrack.com

FORIAN BIOTRACK

Contents

State Traceability versus BioTrack Commercial 4
Logging into State Traceability 5
Switching Locations 7
Bringing in New Inventory for Cultivation 8
Bringing in New Inventory for Retail 9
Creating Inventory Rooms 10
Accessing Your Vendors 11
Destroying Plant Inventory 12
Collecting Waste 15
Generating Sub Lots 16
Adding Vehicles and Creating Drivers (Employees) for Transfers 17
Creating a Manifest 20
Transferring a Manifest 24
Creating Growhouse Rooms 26
Undo Actions for Cultivation 27
Accepting Inbound Transfers 28
Creating New Plants 31
Harvesting Plants 33
Curing Plants 35
Creating a Lot 36
QA Labs 38
Pulling QA Samples 40
Converting Inventory 43
Making Inventory Adjustments 45
Refunding and Voiding Sales 48
Pick up Order for Adult Use Sales 51
Delivery Order for Adult Use Sales 54
Pick-up/Delivery Order for Medical Sales 61
Undo Actions for Inventory 63
Strain Creation 64

Move Action, Cultivation 65
Modify plant 66
Wet Flower workflow 68
Product Packager - Bulk Inventory types 70

State Traceability versus BioTrack Commercial

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

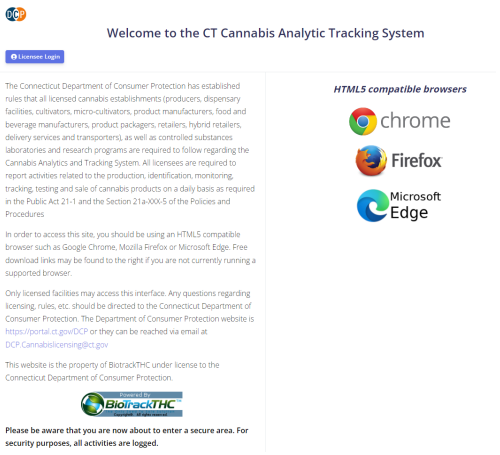
Tags: Commercial, State Traceability, Traceability, Platform, Platforms, System, Systems, Application

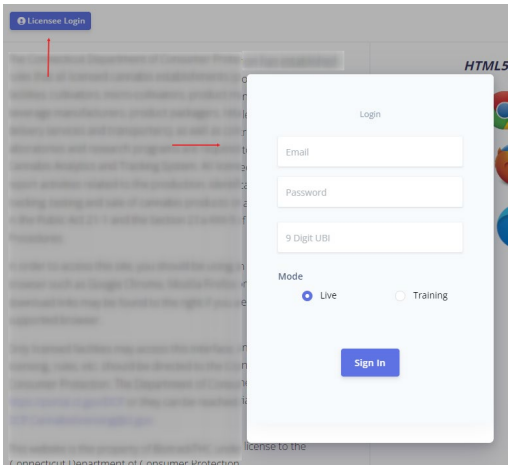
The BioTrack Commercial platform is an application installed on your computer and requires a paid subscription while your State Traceability system can be accessed via the web at trace.ct.biotr.ac at no charge.

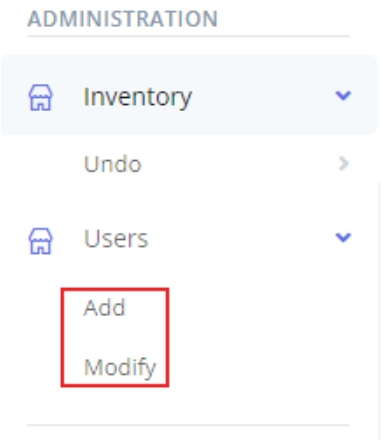
These two platforms are separate but communicate via State Monitoring settings. While you can still log into your State Traceability platform, it is for compliance purposes and will not give you as much functionality as the BioTrack Commercial platform.

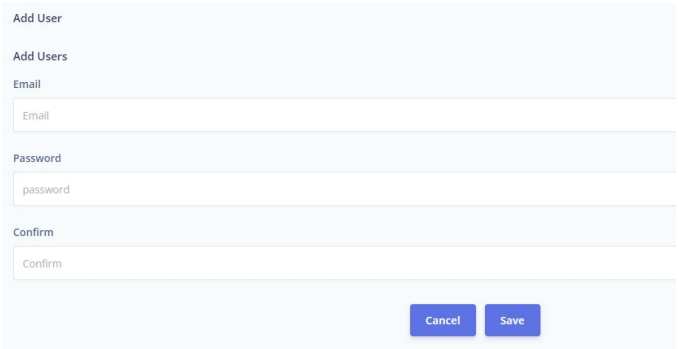
Logging into State Traceability

Summary: How to log into State Traceability Website
Tags: Logging in, Login, Log in, Username, Password, Users, User
Video: Logging into Traceability
Video: Add/Modify/Delete Users









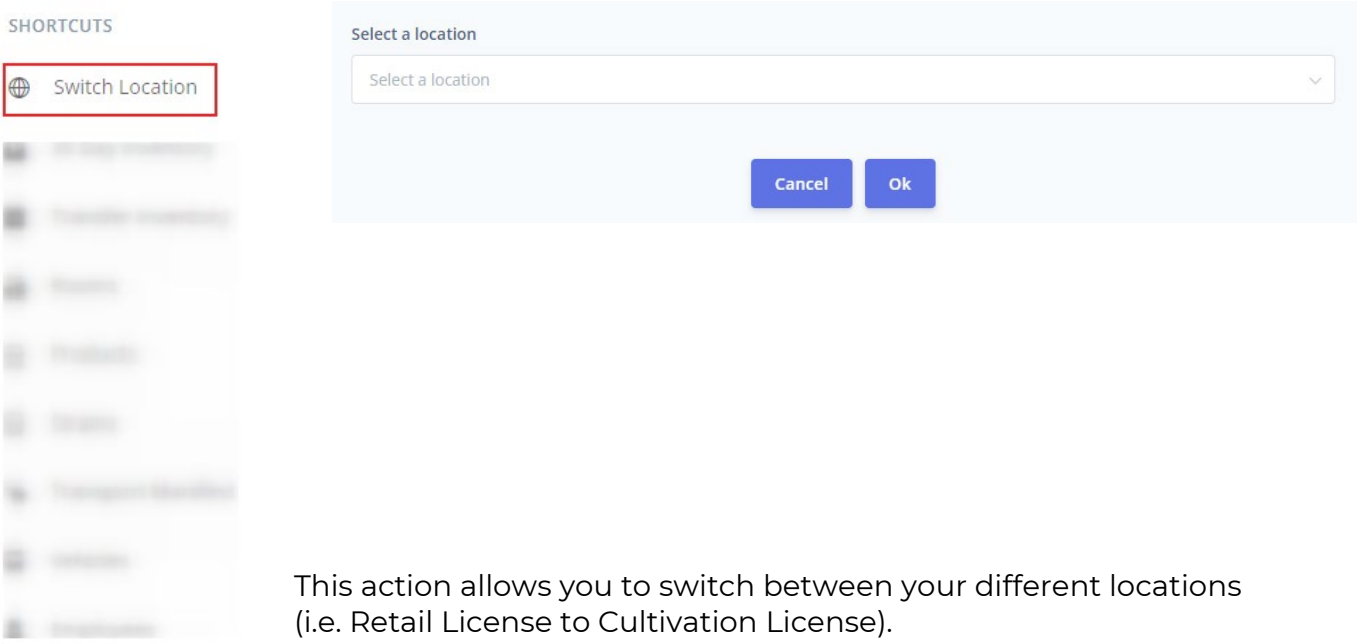
During Onboarding, you will receive your initial Administrator username and password. Any additional users are created by you or another company Administrator. BioTrack will not create additional users.

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

FORIAN BIOTRACK
800.797.4711
6750 N Andrews Ave, Ste 325Fort Lauderdale, FL 33309
sales@biotrack.com
www.biotrack.com

Switching Locations

Summary: How to switch between locations
Tags: Switch Location, Switching Locations, Locations, Change Location
Video: Switch Location
Switching location is located on the Left-hand side under Shortcuts.



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

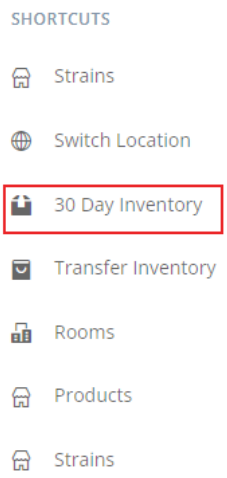
Important Note: If you have multiple licenses you want to make sure you are working under the correct license, click on the Switch Location shortcut and select the license you would like to work under

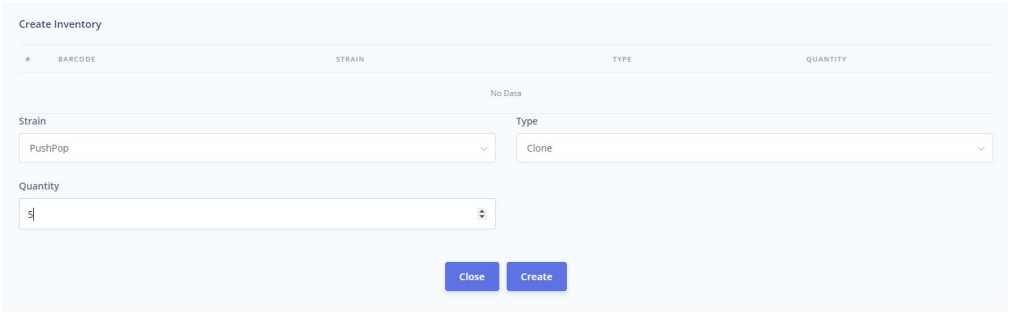
Bringing in New Inventory for Cultivation

Summary: How to take in initial inventory for cultivation
Tags: Inventory, New Inventory, Inventory Window, Seed, Seeds, Clone, Clones, Cultivation, Growhouse, Commercial
Video: New inventory

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 left-hand side under Shortcuts. The *New Inventory* window will appear. Follow the steps below to complete your intake of inventory.



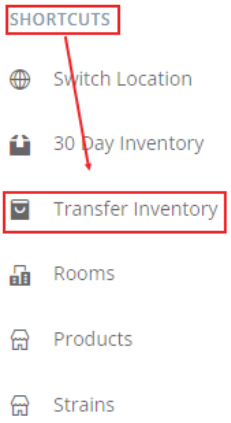


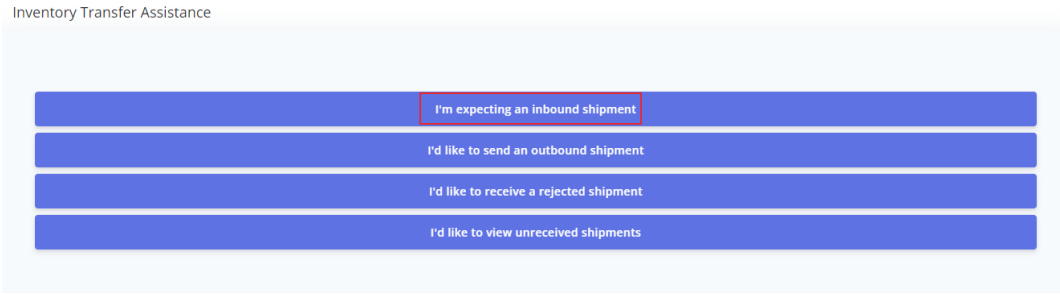
1. Select the Strain
2. Select Type of Seed or Clone
3. Enter the Quantity
4. Click “Create” once you have entered all of your strain quantities. This will generate an inventory Barcode ID.

Bringing in New Inventory for Retail

Summary: How to take in inventory for retail
Tags: Inventory, New Inventory, Retail, Dispensary
Video: Inbound Transfer

The **Transfer Inventory** button located on the left-hand side under Shortcuts allows a retail location to accept an inbound transfer.





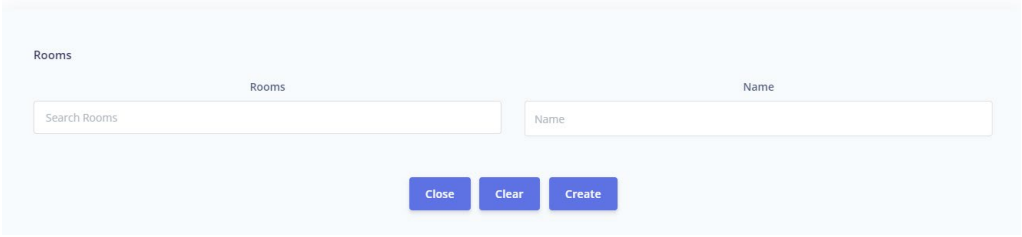
To take in new inventory, select the **Transfer Inventory** in the shortcut section. The *Inventory Transfer Assistance* window will appear. To accept new inventory, select "Im Expecting an Inbound Shipment".

Creating Inventory Rooms

Summary: How to create, modify and delete rooms for inventory
Tags: Inventory Rooms, Inventory Room
Video: Inventory Rooms

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.

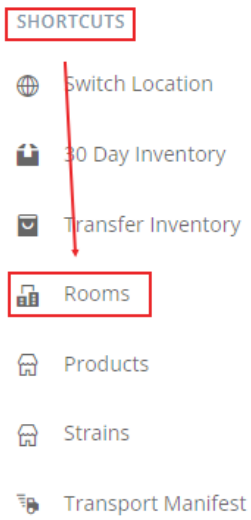
- **Retail rooms**: Vault, Safe, Sales Floor
- **Cultivation rooms**: Seed Bank, Vault, Packaging, By Vendor Name



- **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.

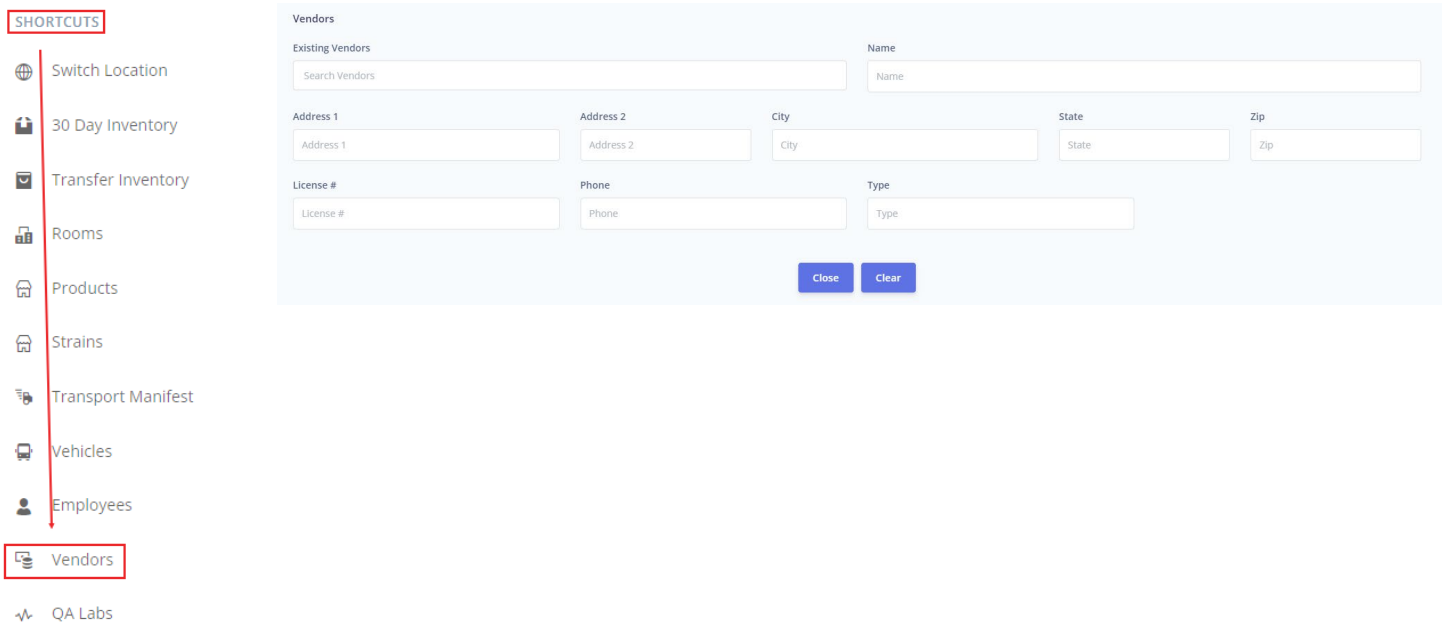
Important Note: Before deleting a room, please make sure there is no Inventory in there.



Accessing Your Vendors

Summary: How to access your vendors
Tags: Vendor, Vendors, Vendor List
Video: Vendors

Vendors are other licensees with an active license from the State. To view your vendors, click the **Vendors** shortcut on the Left-hand side and then the "Vendors" button.



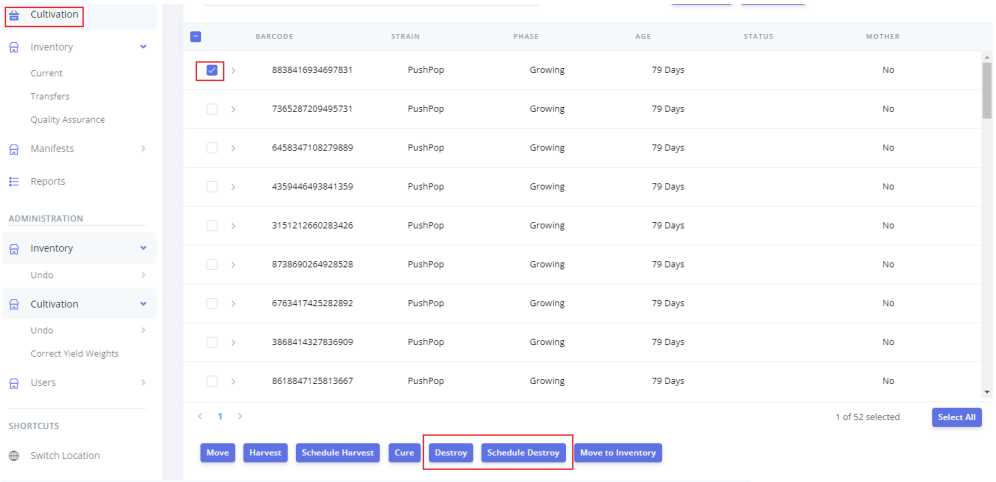
The *Vendors* window that opens will allow you to view/search vendors.
You can select them by clicking in the "view/search" area, if you select a vendor from that drop down you will be able to see their locations information.

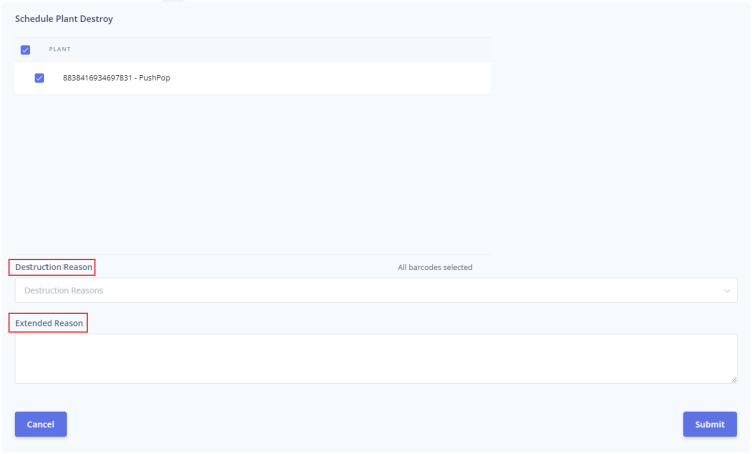
Destroying Plant Inventory

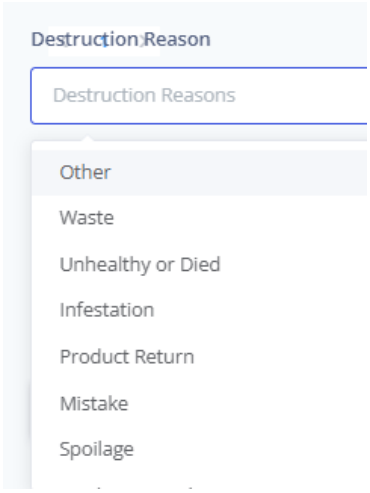
Summary: How to set one plant or multiple plants for destruction
Tags: Plant, Plants, Destroy, Destruction, Undo, Cultivation, Growhouse
Video: Plant Destruction

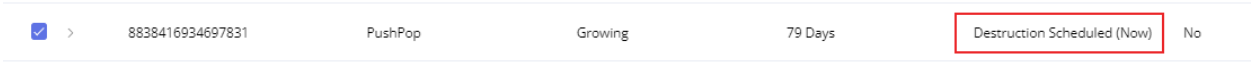
From the **Cultivation** tab in BioTrack, you can select plants to set for destruction.

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 Reason 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.

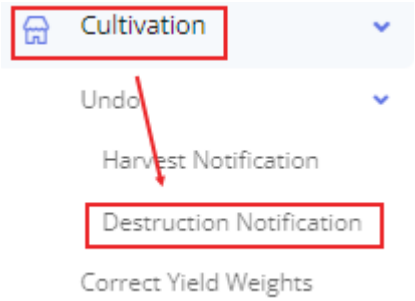








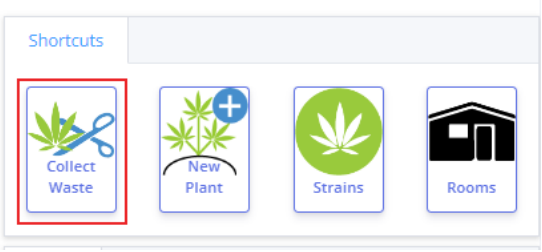
To set plant for destruction, select the plant you need to schedule for destruction from the **Cultivation** section and then click "Remove" at the bottom of the screen. The *Destruction Reason* window will appear where you can use the drop down to select the Destruction Reasons and enter a reason for destruction.
You'll see the plants are scheduled for destruction



Important Note: You can undo a destruction notification from the **Cultivation** section on the left-hand side → ***Undo*** → ***Undo Destruction Notification***.

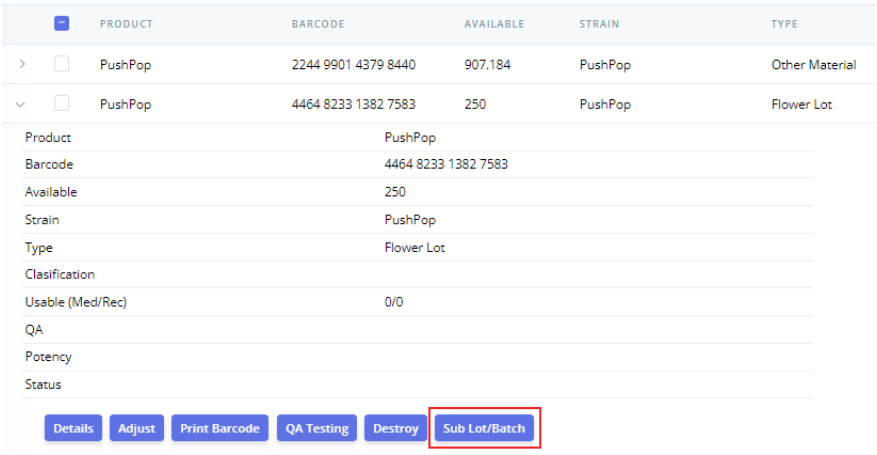
Collecting Waste

Summary: How to collect waste and schedule for destruction
Tags: Waste, Collect Waste, Destroy, Destruction, Undo, Cultivation
Video: Collect Waste



Should you need to record any waste collected outside of the Harvest/Cure process, from the Cultivation section, 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 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.

Generating Sub Lots

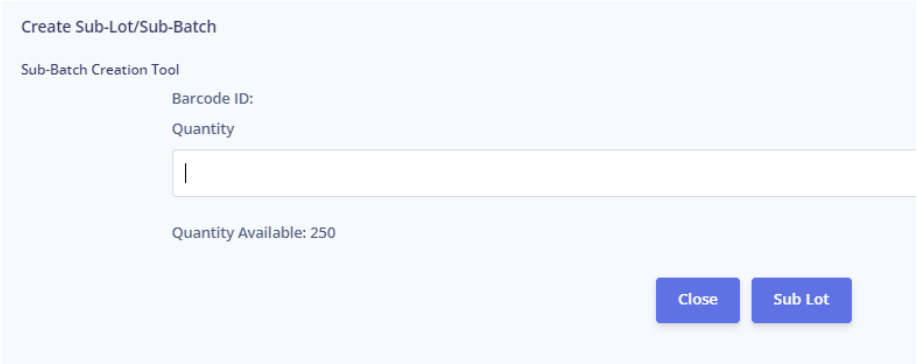
Summary: What is a sub lot, when to sub lot and how to generate a sub lot
Tags: Sub lot, Sub lots, Sub lotting, Sublot, Sublots, Sublotting, Batch, Batches
Video: SubLot

Sub lotting items 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.

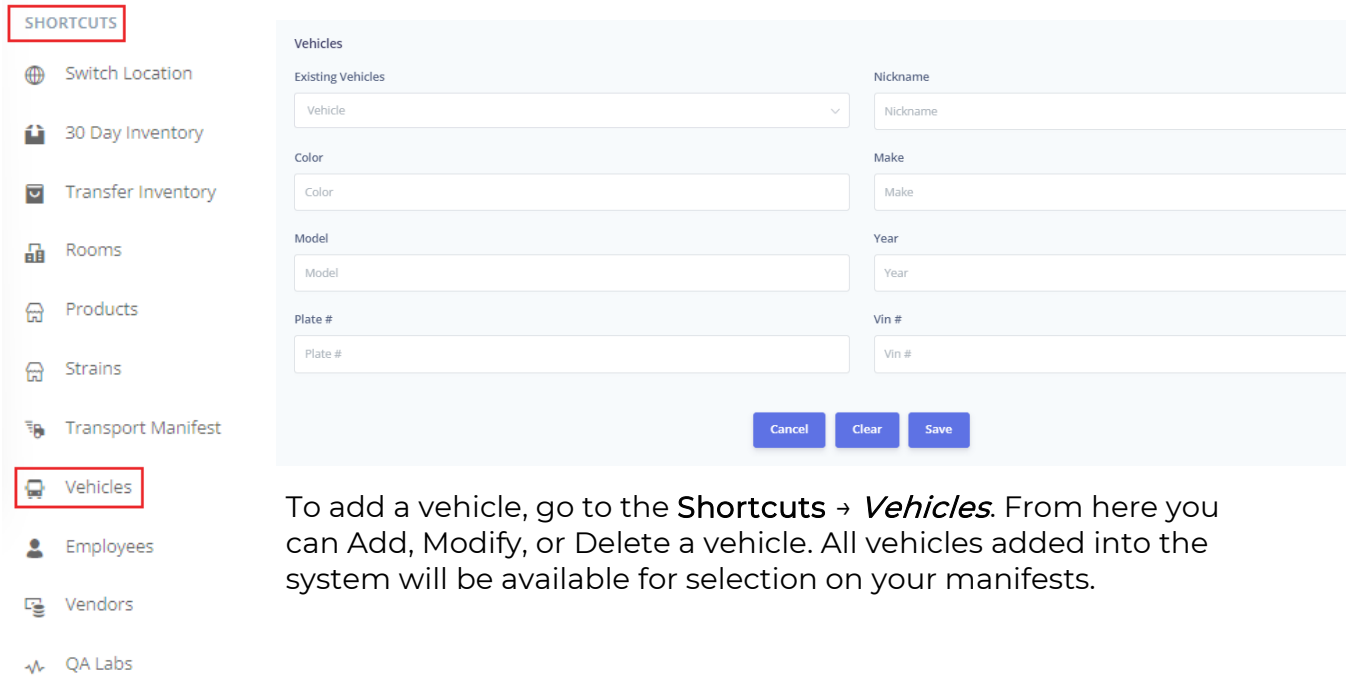
Important Note: There is no Undo action when you sub lot. If done incorrectly, you will have to adjust the parent lot up to the original quantity, then adjust the sub lotted amount down to 0.



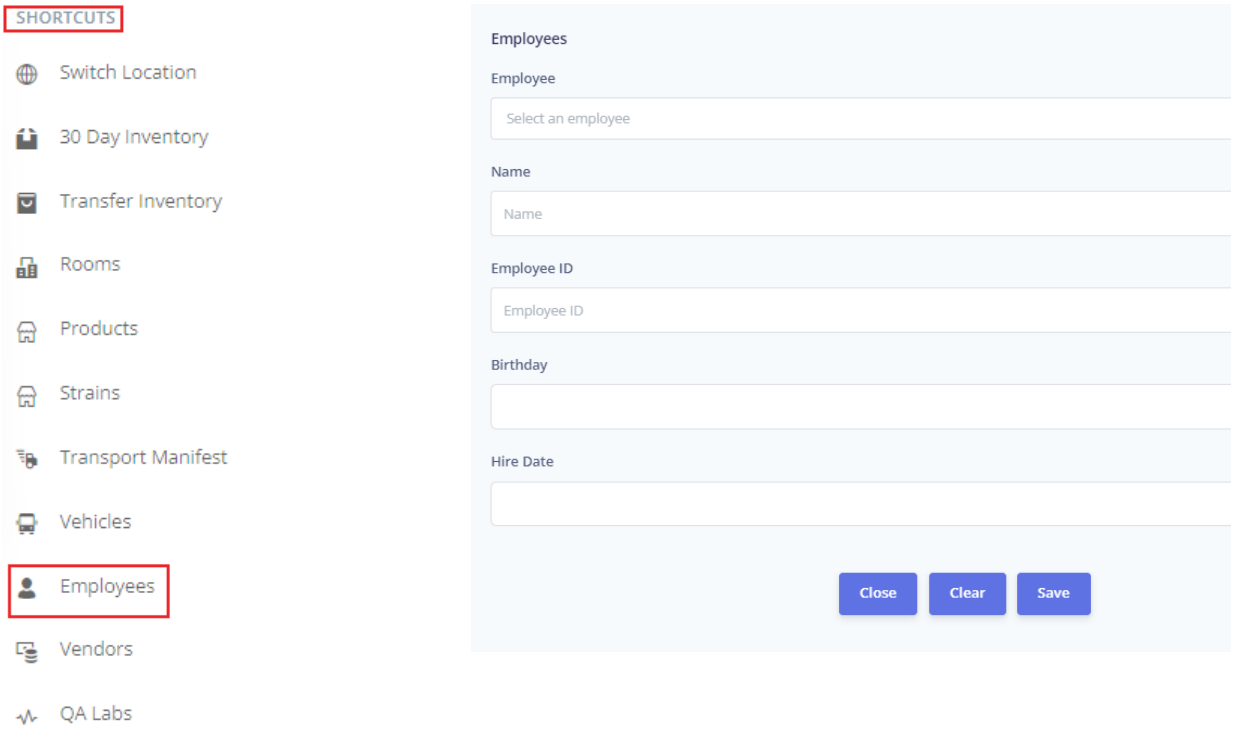
Adding Vehicles and Creating Drivers (Employees) for Transfers

Summary: How to set up vehicles and drivers to perform transfers
Tags: Vehicle, Vehicles, Driver, Drivers, Employees, Transfer, Transfers
Video: Employees & Vehicles

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



To add a vehicle, go to the **Shortcuts** → ***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.



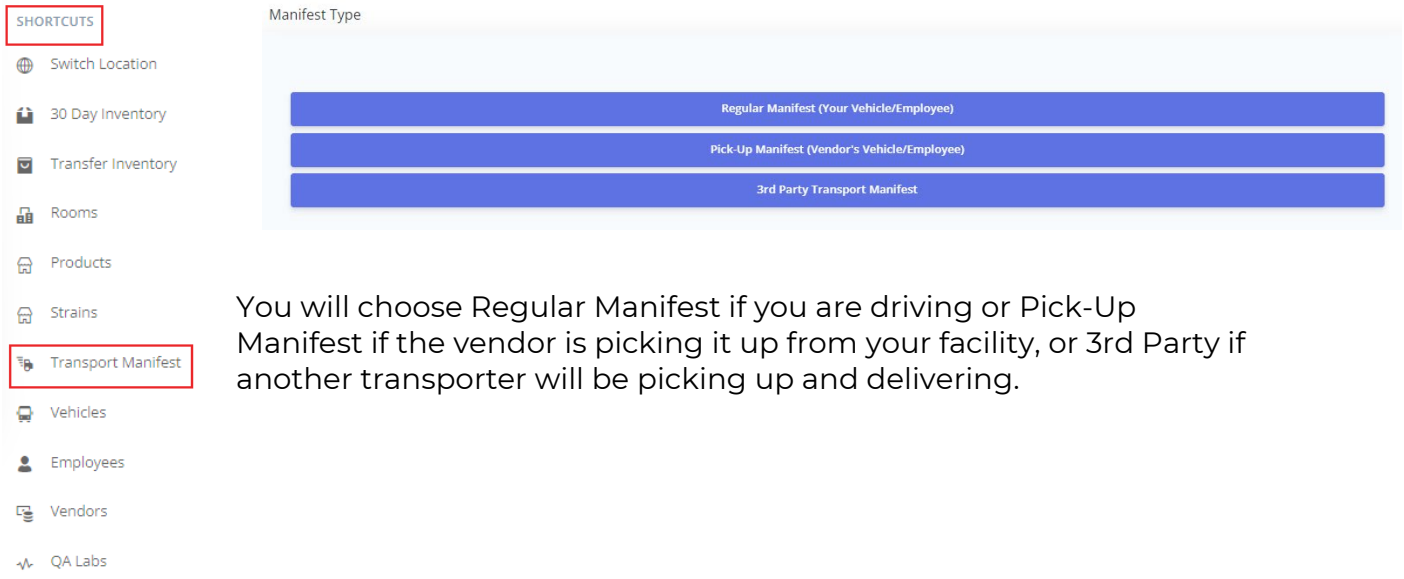
To add an Employee, go to the **Shortcuts** → ***Employees***. From here you can Add, Modify, or Delete Employees. All Employees added into the system will be available for selection on your manifests.

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

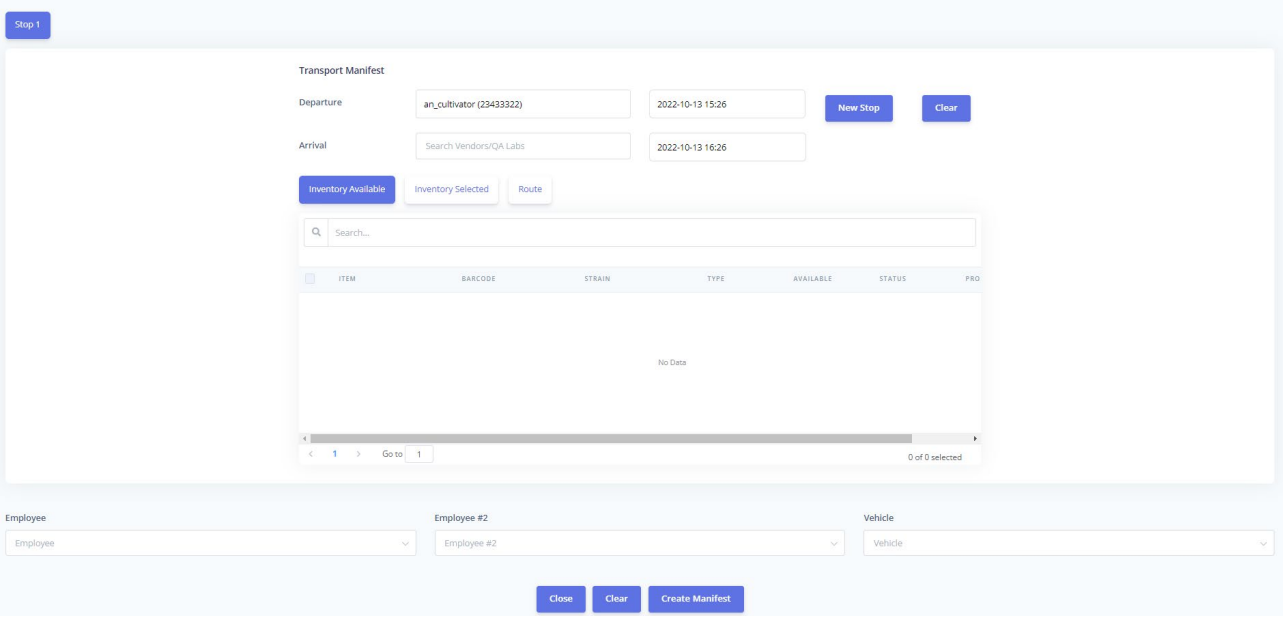
Creating a Manifest

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
Video: Creating a Manifest

From the **Inventory** tab, select **New Manifest** on the Left-hand side under Shortcuts. This will bring up the *Manifest Type* window with three options: Regular Manifest, Pick-Up Manifest, and 3rd Party Transport Manifest.

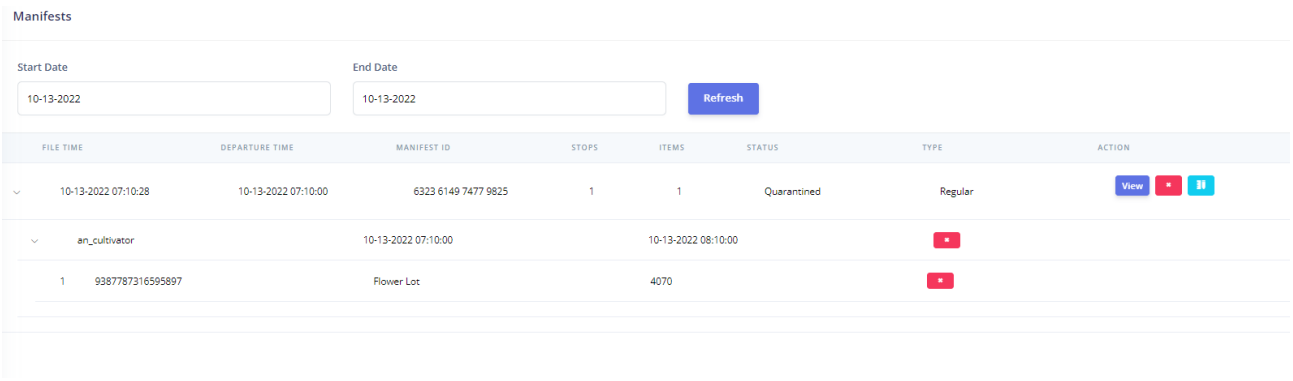


You will choose Regular Manifest if you are driving or Pick-Up Manifest if the vendor is picking it up from your facility, or 3rd Party if another transporter will be picking up and delivering.



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 vendors vehicle and driver.

As long as the vendor has been selected 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.

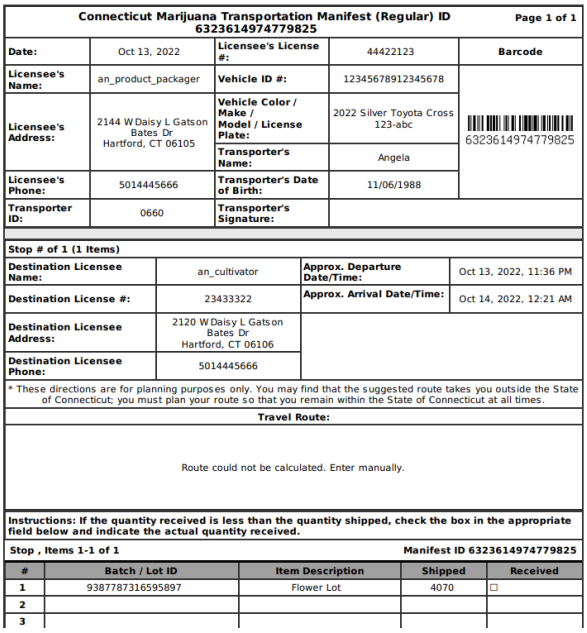


From the left-hand side shortcuts → **Manifests**, you can see all “Shipped” and “Quarantined” manifests.

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

View = Print, reprint or view the manifest
Modify Manifest (blue icon with ruler) = Modify the Driver on the manifest.
Void Manifest (red box with x) = 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.

Example of a Manifest:



Connecticut Marijuana Transportation Manifest (Regular) ID 6323614974779825 — Page 1 of 1

Date:	Oct 13, 2022	**Licensee's License #:**	44422123	**Barcode**
Licensee's Name:	an_product_packager	**Vehicle ID #:**	12345678912345678	6323614974779825
Licensee's Address:	2144 W Daisy L Gatson Bates Dr Hartford, CT 06105	**Vehicle Color / Make / Model / License Plate:**	2022 Silver Toyota Cross 123-abc	
		Transporter's Name:	Angela	
Licensee's Phone:	5014445666	**Transporter's Date of Birth:**	11/06/1988	
Transporter ID:	0660	**Transporter's Signature:**		

Stop # of 1 (1 Items)

Destination Licensee Name:	an_cultivator	**Approx. Departure Date/Time:**	Oct 13, 2022, 11:36 PM
Destination License #:	23433322	**Approx. Arrival Date/Time:**	Oct 14, 2022, 12:21 AM
Destination Licensee Address:	2120 W Daisy L Gatson Bates Dr Hartford, CT 06106		
Destination Licensee Phone:	5014445666		

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

Travel Route:

Route could not be calculated. Enter manually.

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 , Items 1-1 of 1 — **Manifest ID 6323614974779825**

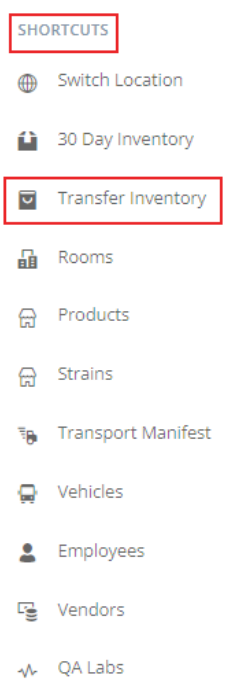
#	Batch / Lot ID	Item Description	Shipped	Received
1	9387787316595897	Flower Lot	4070	☐
2				
3				

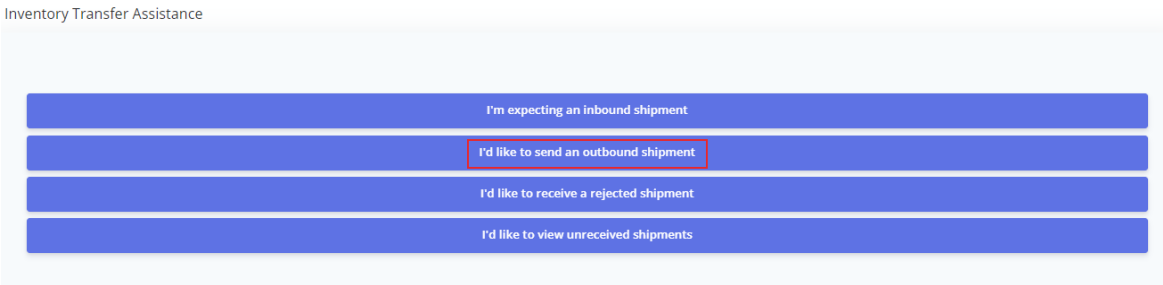
Important Note: Any manifest with the status of “Shipped” cannot be voided. You must void the transfer first

Transferring a Manifest

Summary: How to transfer your manifest, void a manifest and void a transfer
Tags: Transfer Inventory, Transfer Manifest, Transfers, Outbound Shipment
Video: Transfer Manifest

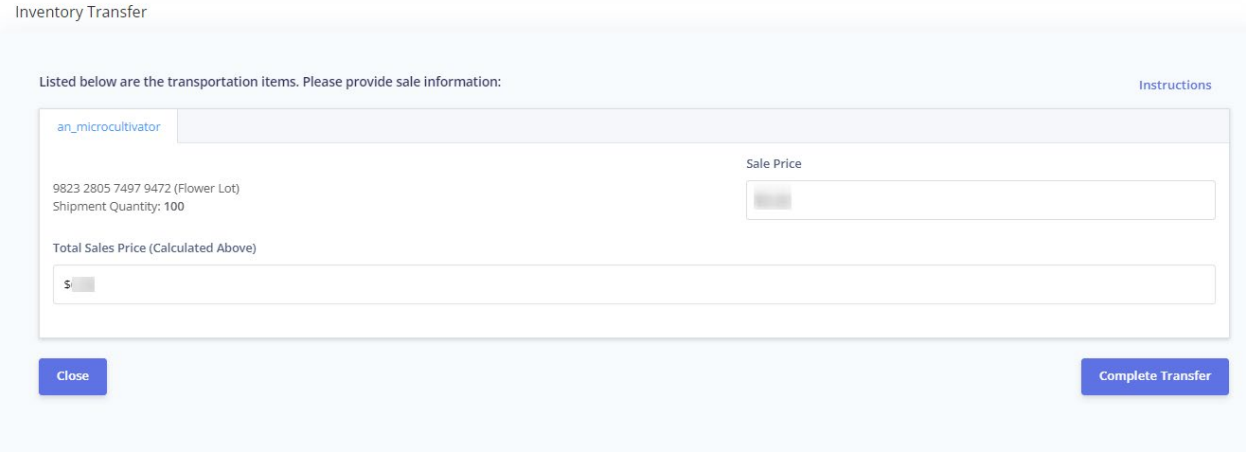
Now that you have created your manifest, you will need to move forward with the transfer.





To transfer your manifest, select **Transfer Inventory** from the Shortcuts on the Left-hand side of your **Shortcuts**. 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 section → **Transfers**.

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.

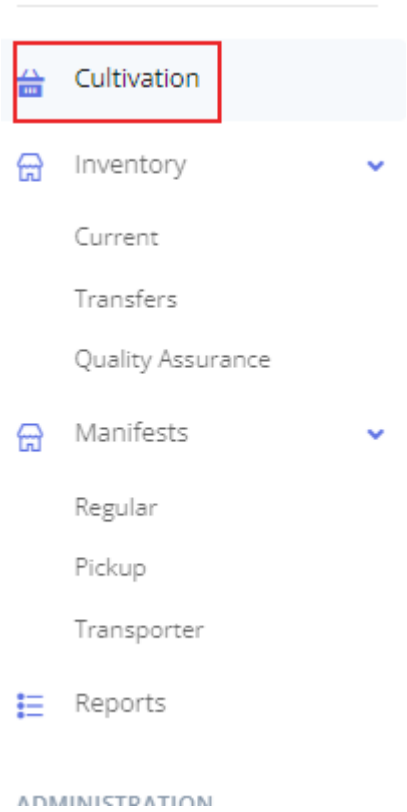
There are a few additional actions you can perform from the **Transfers** tab.

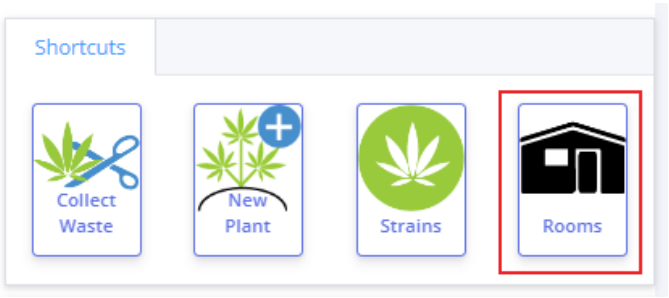
Modify Transfer = Allows you to correct the price on the transfer.
Void Transfer = Void a transfer which will send the items back to the Manifest tab listed with a status of "Quarantined" after refreshing.

Creating Cultivation Rooms

Summary: How to create, modify and delete rooms for Cultivation
Tags: Rooms, Room, Cultivation, Growhouse
Video: Cultivation Rooms

You can create a Cultivation room from the **Cultivation** section→ ***Rooms*** (Found on the right-hand side under "shortcuts"

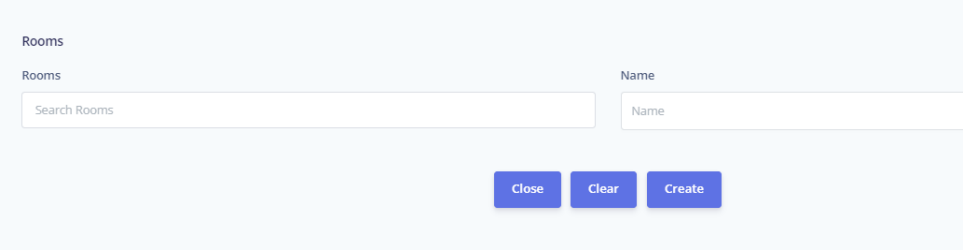




From the *Rooms* window you can Add, Modify or Delete a room. Rooms can be created and named however you choose. Please see some common examples below.

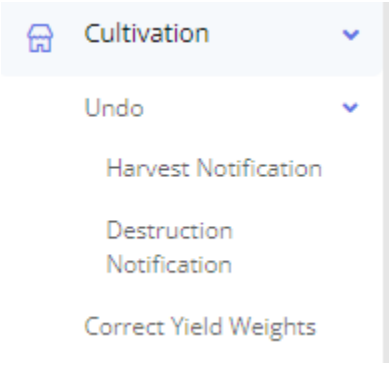
- Veg
- Flower 1
- Dry/Cure
- Tent
- Greenhouse 1
- Hoop House 1
- Field
- Outdoor 1

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



Undo Actions for Cultivation

Summary: Explanation of the various undo actions available for Cultivation
Tags: Undo, Undo Actions, Cultivation, Growhouse
Video: Cultivation Undo



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

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).

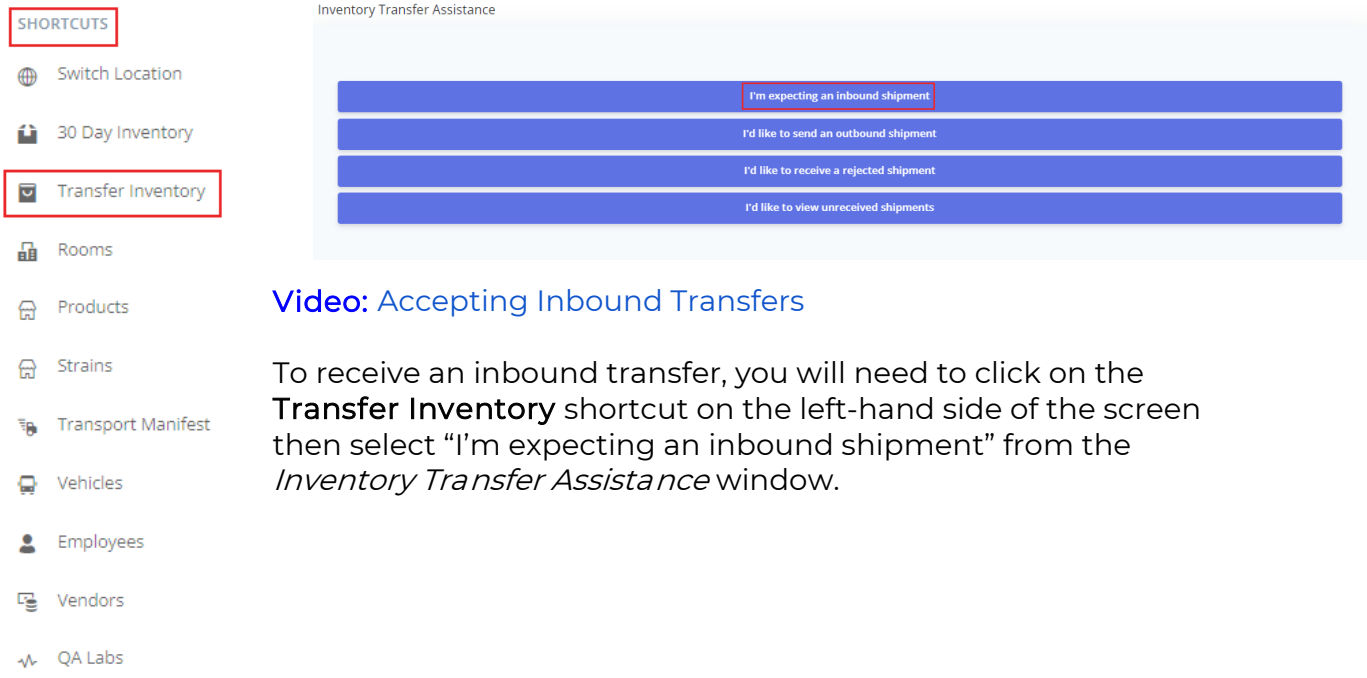
Undo Harvest Notification - If you have set the incorrect plant(s) for harvest, you can undo the notification, assuming you haven't gone through the harvest process.

Undo Correct Yield Weights - Undo Cure Plant is not an option, If your dry weights are 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, 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.

Accepting Inbound Transfers

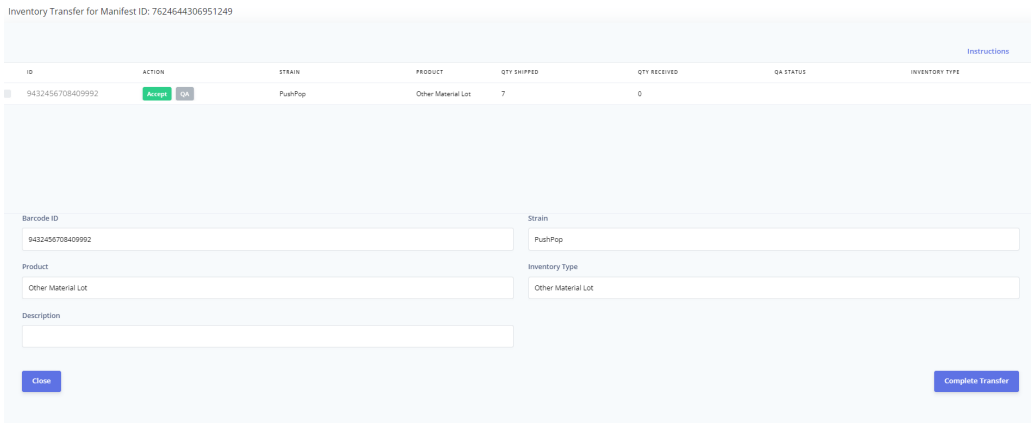
Summary: How to accept inbound transfers into inventory
Tags: Transfer Inventory, Inbound Transfer, Inbound Transfers, Transfers, Inbound Shipment



Video: Accepting Inbound Transfers

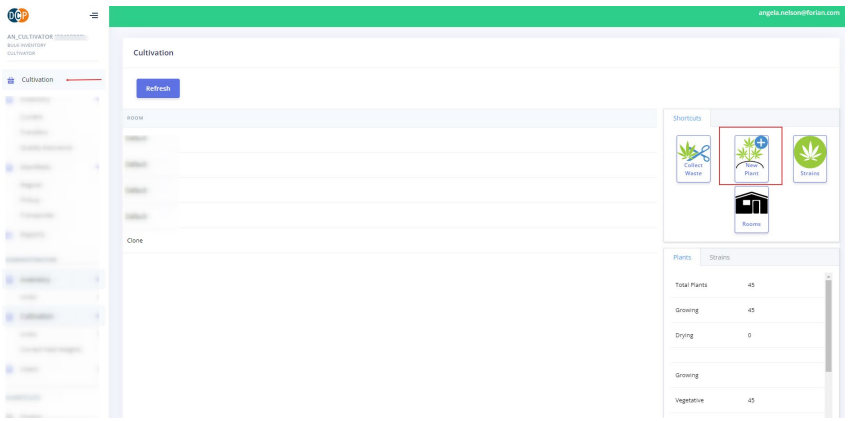
To receive an inbound transfer, you will need to click on the **Transfer Inventory** shortcut on the left-hand side of the screen then select "I'm expecting an inbound shipment" from the *Inventory Transfer Assistance* window.

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



First, select the correct shipment by clicking on the transfer.
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. Enter the Quantity you are accepting in. You can reject all by entering 0 or reject a partial amount.
2. How much you Paid for that line item
3. When you are finished, select “Accept” to the right side of the inventory ID.
4. Complete transfer once finished



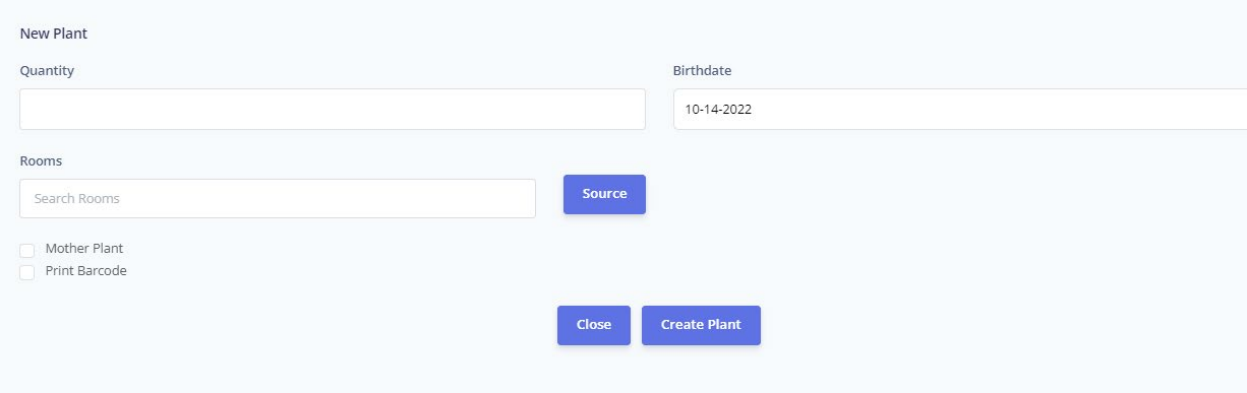
Creating New Plants

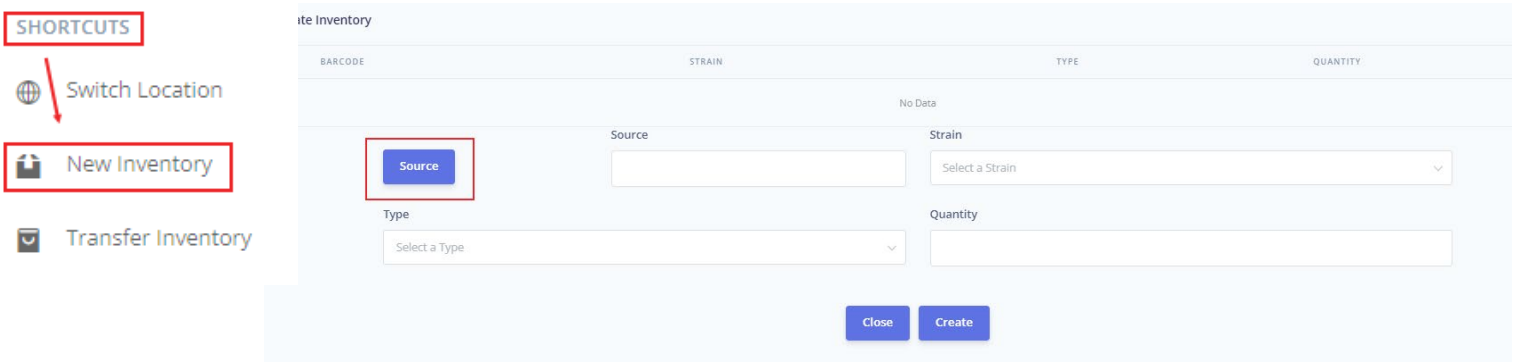
Summary: How to create a new plant via Source ID or Mother ID, The purpose of a Mother Plant
Tags: New Plant, New Plants, Source ID, Mother ID, Mother Plant, New Inventory
Video: New Plants/Source ID/Mother ID

Assuming you have taken in plants/seeds during your window, these plants will be located in your inventory. To get them into your Cultivation, select **New Plant** on the right-hand side under Shortcuts and then select “Source ID” to source from your inventory.

- 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.

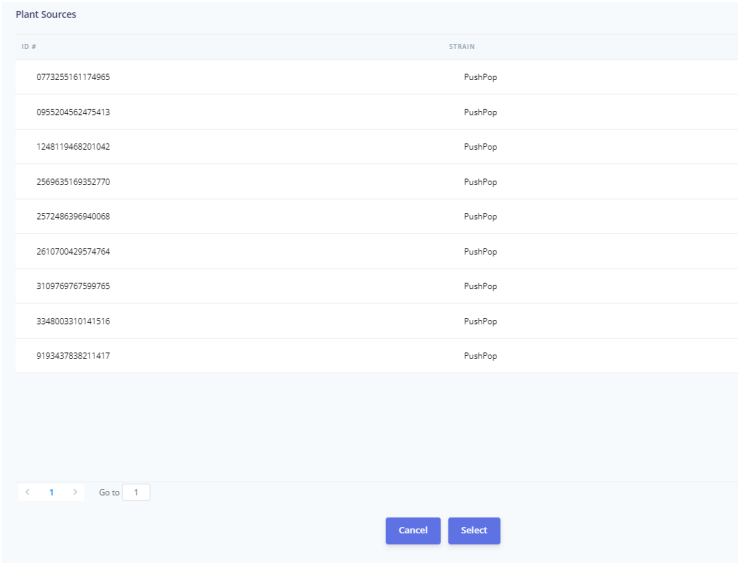
If a plant is selected as a Mother, go to **Inventory** and click the “New Inventory”. From there select “Source ID”, this will find every plant in your Cultivation listed a mother to clone from.

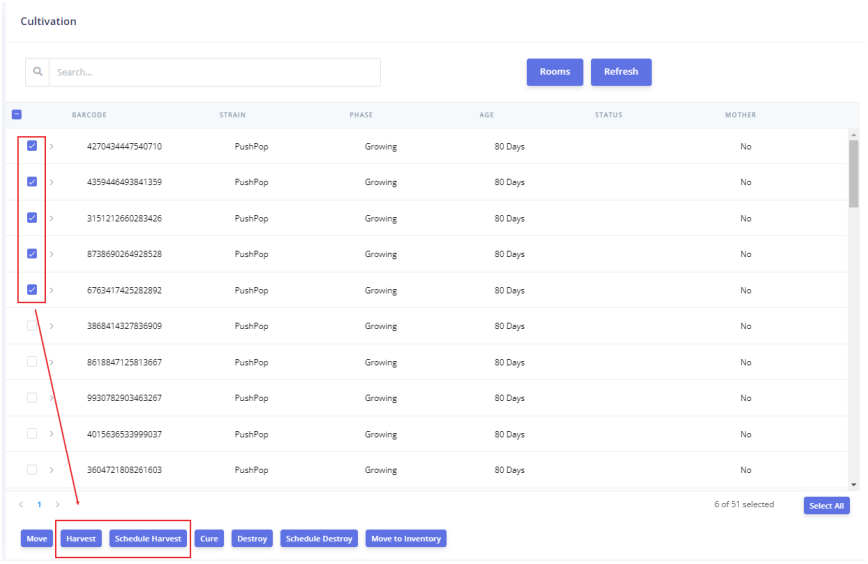


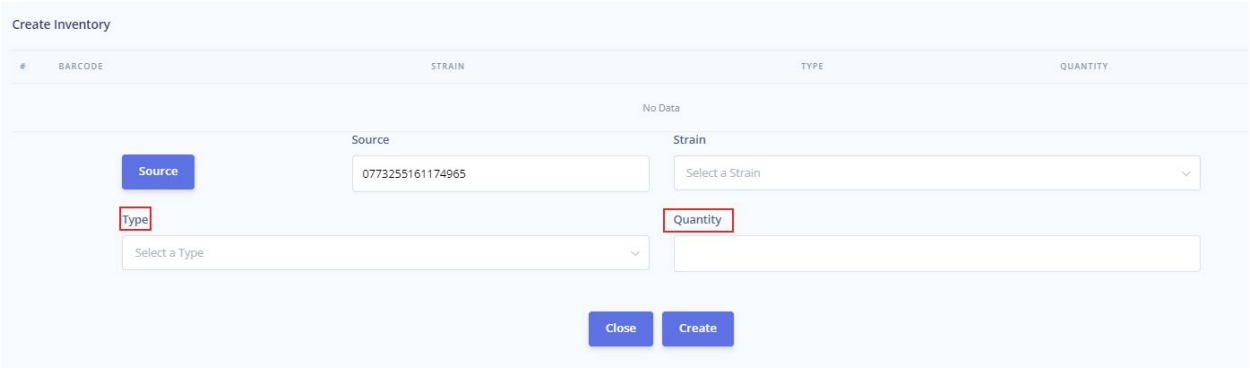


Once you select “source”, the Plant Sources screen will appear allowing you to select the mother plant you’d like to source from to clone.

After selecting the Mother, you will then be able to enter the Quantity and type of seed/clone. Once finished, the clone/seed will be added to your inventory. From there you can Source the plant into the Cultivation section using Source ID action.




Cultivation
Search...
Rooms
Refresh
BARCODE
STRAIN
PHASE
AGE
STATUS
MOTHER
4270434447540710 PushPop Growing 80 Days No
4359446493841359 PushPop Growing 80 Days No
3151212660283426 PushPop Growing 80 Days No
8738690264928528 PushPop Growing 80 Days No
6763417425282892 PushPop Growing 80 Days No
3868414327836909 PushPop Growing 80 Days No
8618847125813667 PushPop Growing 80 Days No
9930782903463267 PushPop Growing 80 Days No
4015636533999037 PushPop Growing 80 Days No
3604721808261603 PushPop Growing 80 Days No
6 of 51 selected
Select All
Move
Harvest
Schedule Harvest
Cure
Destroy
Schedule Destroy
Move to Inventory


Create Inventory
#
BARCODE
STRAIN
TYPE
QUANTITY
No Data
Source
Strain
Source
0773255161174965
Select a Strain
Type
Quantity
Select a Type
Close
Create

Harvesting Plants

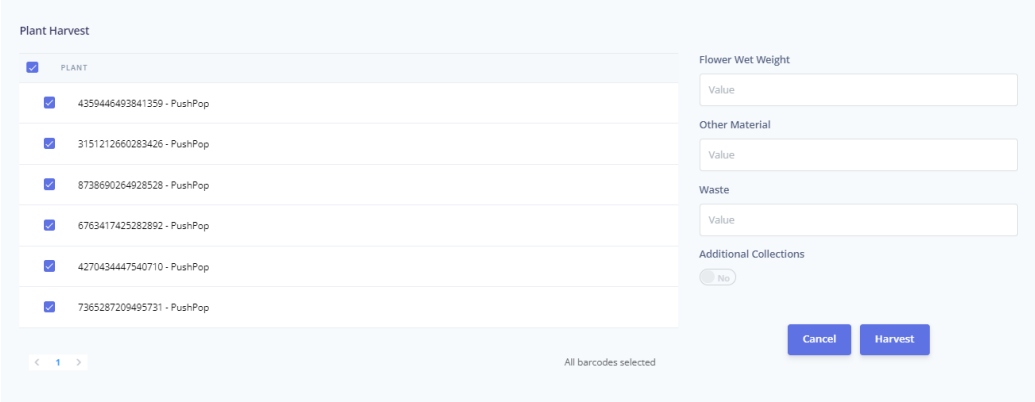
Summary: How to harvest plants
Video: Harvesting plants

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 **Cultivation** section, select the plants you'd like to harvest by checking the boxes to the left.
- Click the "schedule harvest" 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.

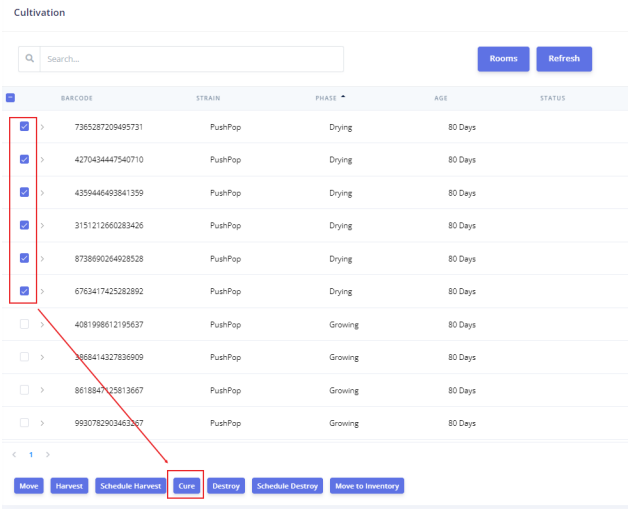
1. Click inside the Flower Wet Weight field and enter in the total wet weight for ALL plants selected.
2. If applicable, enter the Other Material weight.
   → Any Other Material collected at this time will be sent to your inventory.
3. If applicable, enter the Waste weight.
   → Any Waste collected at this time will be sent to your inventory.
4. The Next button will change to "Finish," indicating you're done.

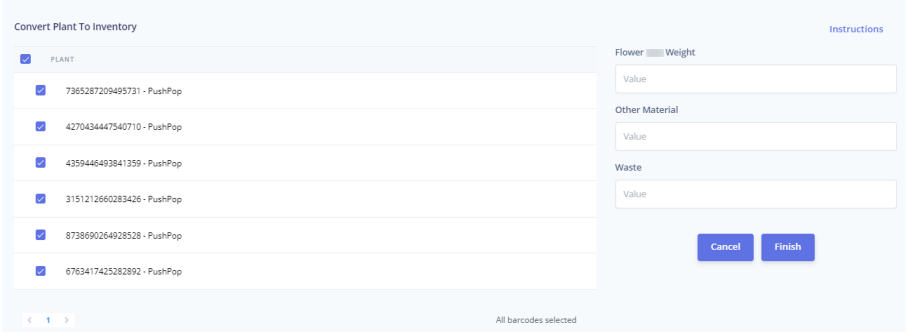


Curing Plants

Summary: When and how to cure plants
Video: Curing plants

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 "Cure" button at the bottom of the **Cultivation** 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.
2. Enter any Other Material weight.
3. Enter any Waste weight.
4. Select to Finish, this will finalize the cure action

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

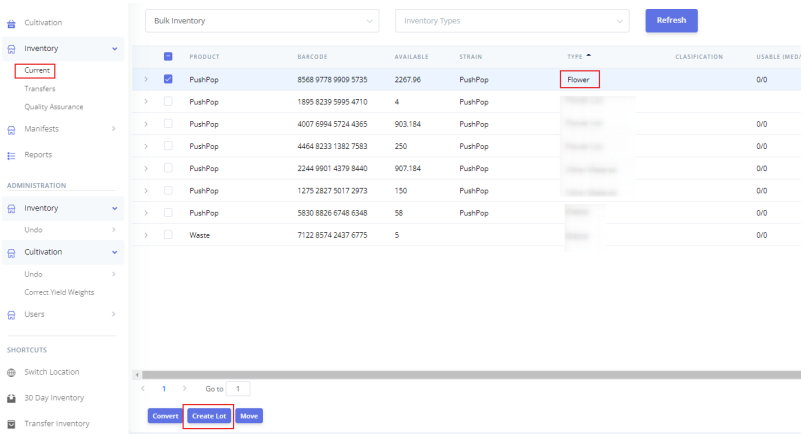
Important Note: Flower and Other Material will be turned into Lots for Converting/Testing.

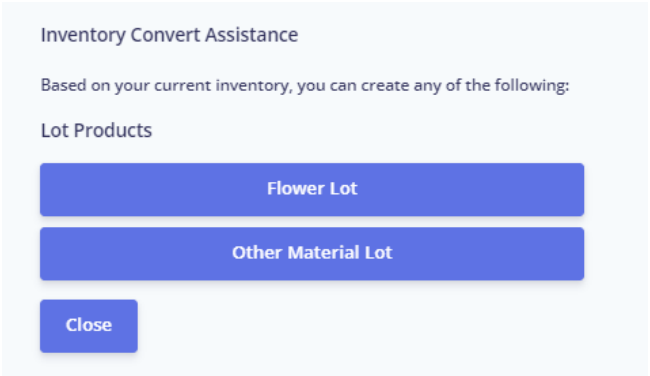
Important Note: Waste will need to be marked for destruction. Follow the instructions in the *"Collecting Waste"* article.

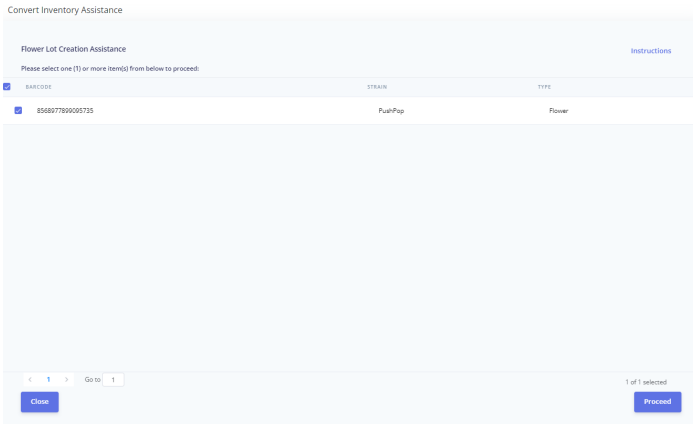
Creating a Lot

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

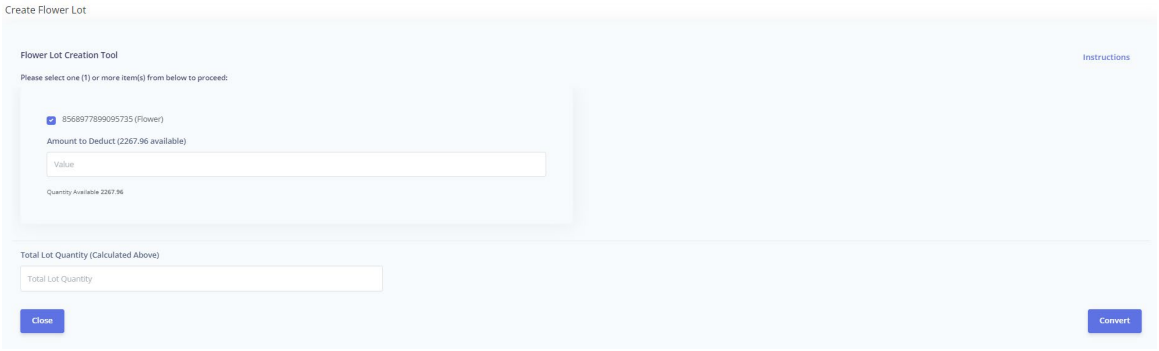
Creating a lot is something you will need to do after the cure process. At this point you will have “Flower,” “Other Material,” and possibly “Waste.”







There nothing 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.

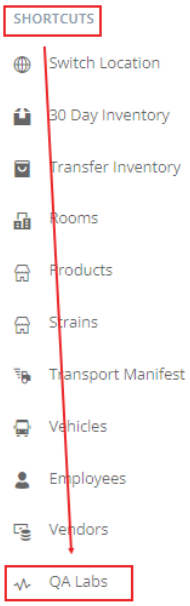
You can use multiple “Flower” batches to create a single Flower Lot as long as it's all the same strain.

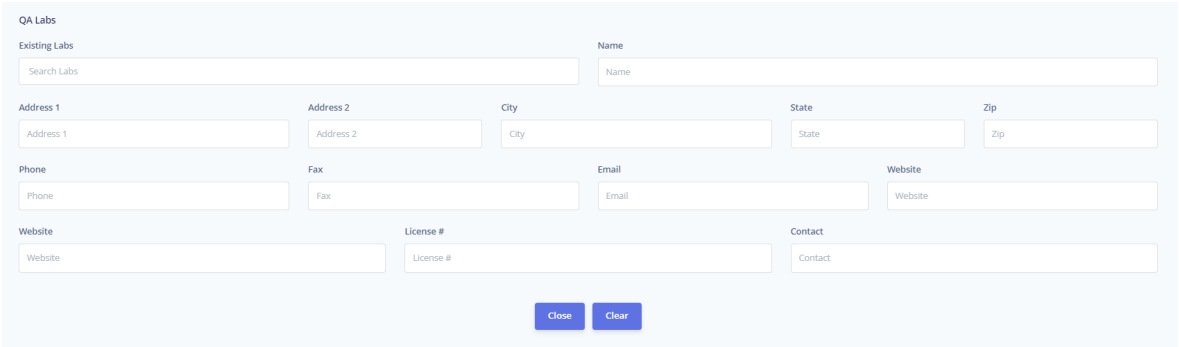
Likewise, you can use multiple “Other Material” batches to create a single Other Material Lot as long as it's all the same strain.

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.

QA Labs

Summary: View QA Labs
Video: QA Labs



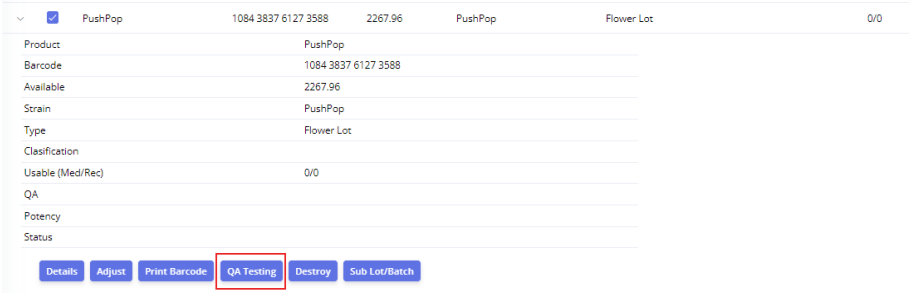


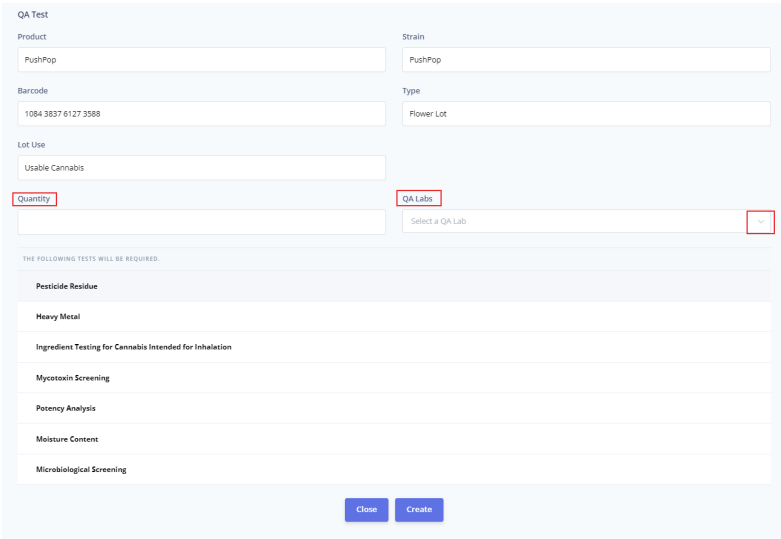
QA testing is the process of taking samples from a lot to send to a lab for testing.

Pulling QA Samples

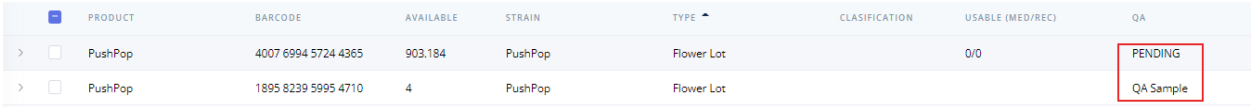
Summary: How to pull QA samples correctly
Tags: Sample, Samples, QA, Testing, Test, Lab, Labs, Results, Quality Assurance
Video: QA Samples

QA samples will be sent to a Lab for potency analysis, you must pull a sample and have *passed* QA results to manifest and transfer out for sale.





- 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 "Create."

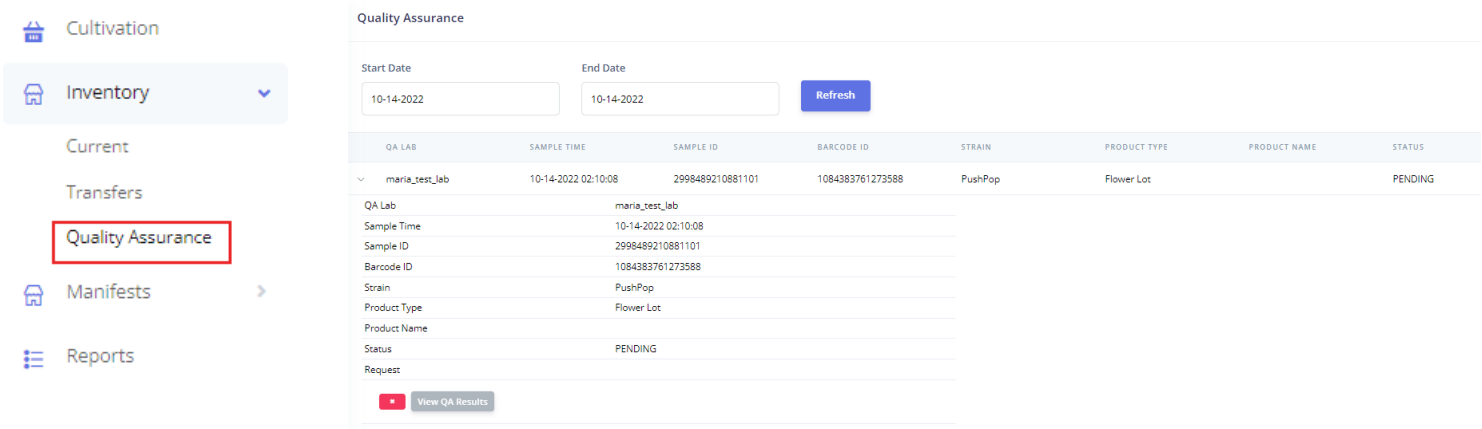


	PRODUCT	BARCODE	AVAILABLE	STRAIN	TYPE	CLASIFICATION	USABLE (MED/REC)	QA
	PushPop	4007 6994 5724 4365	903.184	PushPop	Flower Lot		0/0	PENDING
	PushPop	1895 8239 5995 4710	4	PushPop	Flower Lot			QA Sample

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** section → **Quality Assurance**. From there, you will have the option to "View QA 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: After pulling the QA sample, you will need to create a Manifest and transfer the sample to the lab. For the State of Connecticut, you will need to add the names and vehicles of the QA Lab drivers as your own employees in order to assign them to the manifest

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

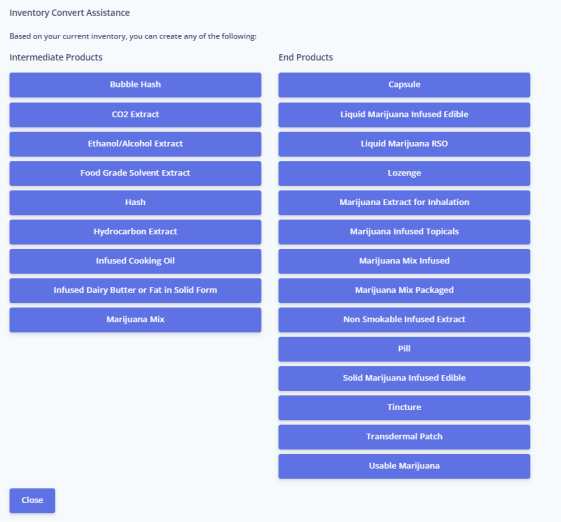
Converting Inventory

Summary: How to convert inventory, what conversions are permissible
Video: Convert Inventory

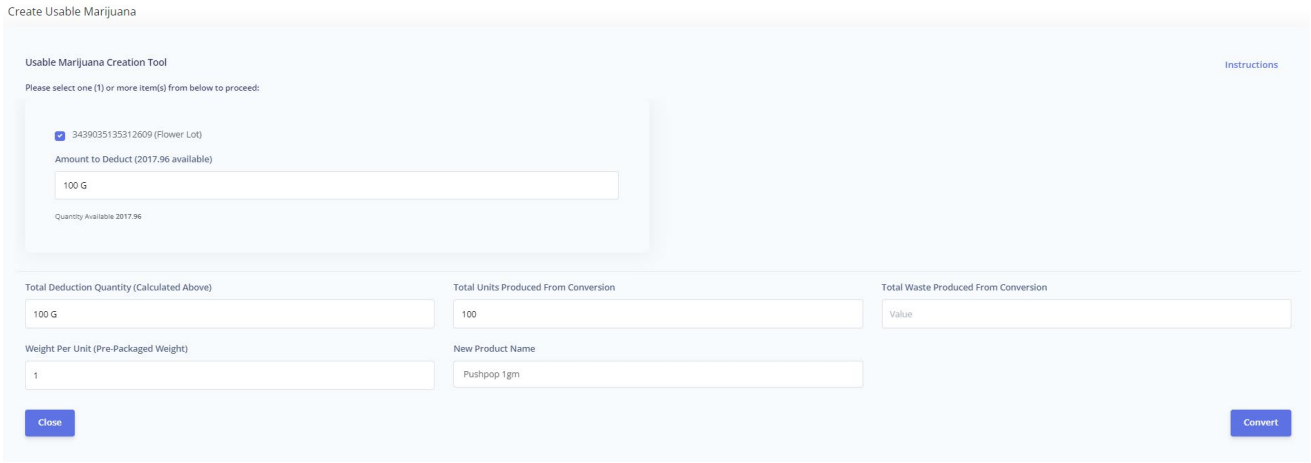
When converting, you have your beginning Lot products, Intermediate products, and End products.

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 the following example, we are using Flower Lot and converting it to the End product of Usable Marijuana.



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.

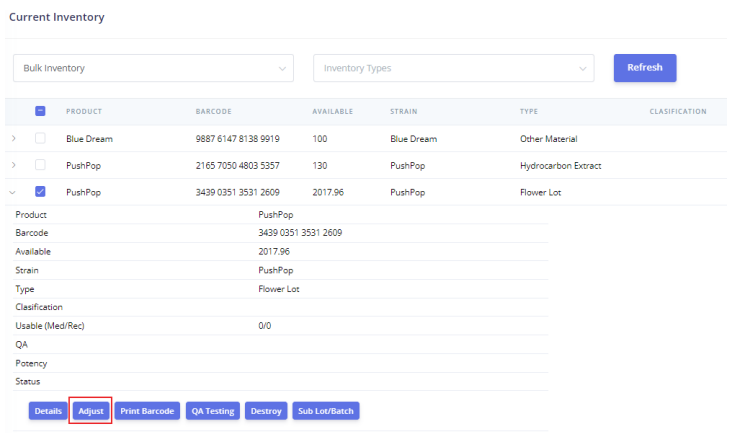
Inventory types are dictated by the conversion. Once an item is created using the "Convert" action, you cannot change the inventory type. You will either have to undo the conversion or use the adjustment feature.

Making Inventory Adjustments

Summary: When inventory adjustments may be needed, How to make an inventory adjustment
Video: Inventory Adjust

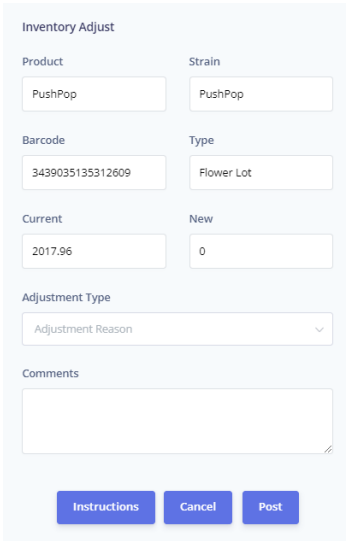
Adjustments to inventory in your system may become necessary if you have made a mistake, have moisture loss, or have been directed by the State to make one.

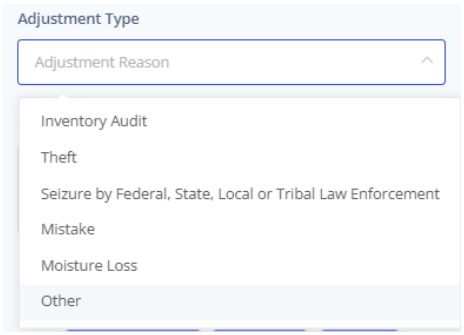
All adjustments require an Adjustment Type and Adjustment Reason.



You can 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.





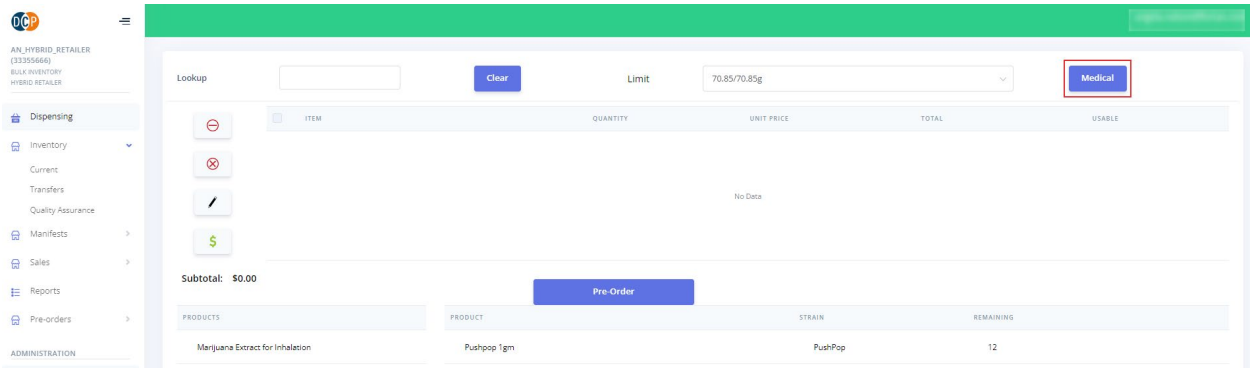
Important Note: At any point, if you feel unsure about making an adjustment, please contact the State for approval.

Navigating the Point of Sale

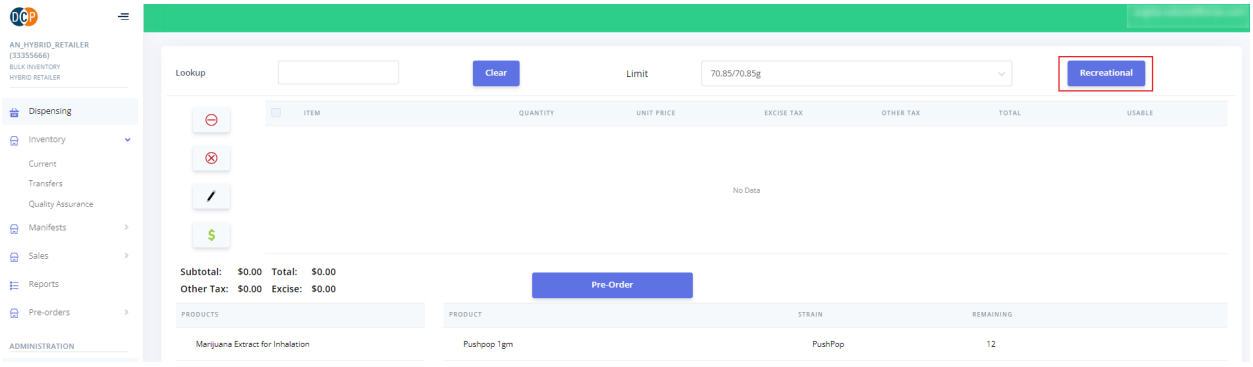
Summary: An overview of the Point-of-Sale features, How to complete a sales transaction
Video: Point of Sale

Under the Dispensing section you will have the option to toggle between Medical Sales and Recreational Sales with the button shown in these pictures. Each function is set to meet the Medical or Recreational sales limits.

→If choosing medical it will ask you for the Patients ID to verify the medical limits.

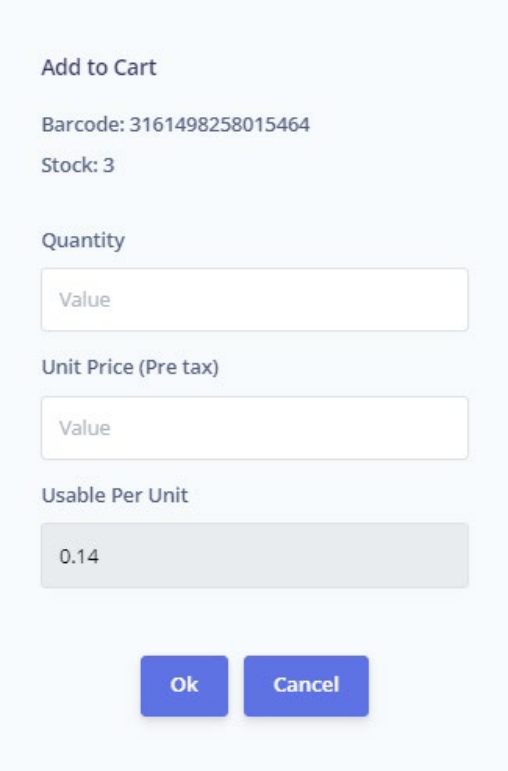


→If Recreational, no customer needs to be verified. You may continue the sale as long as you are not exceeding the Rec limits.



- The available inventory for sale is dependent on the room you have selected on the inventory page. This allows for licensees to create a virtual room to easily separate products for sale. The room you are in, is the room you will sell out of. Example of added rooms: Sales Floor / Back Stalk

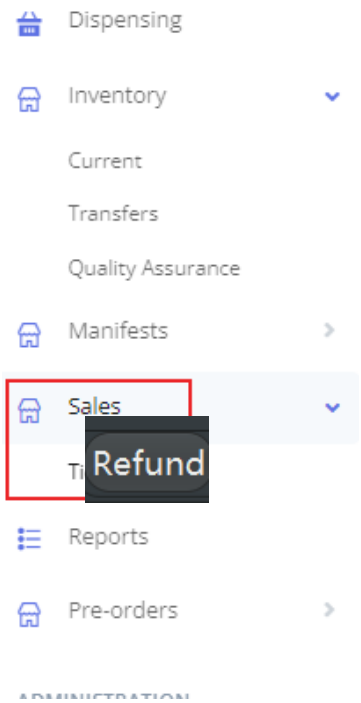
The Pay window below is the pay tender screen. You have a few options to enter the price. Type the Quantity, and Unit price (Pre Tax). Then select “OK”. Once finished building the customer's ticket, you can tender the sale. .



Refunding and Voiding Sales

Summary: How to refund an item, When and how to void a sale
Video: Refunds & Voids

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

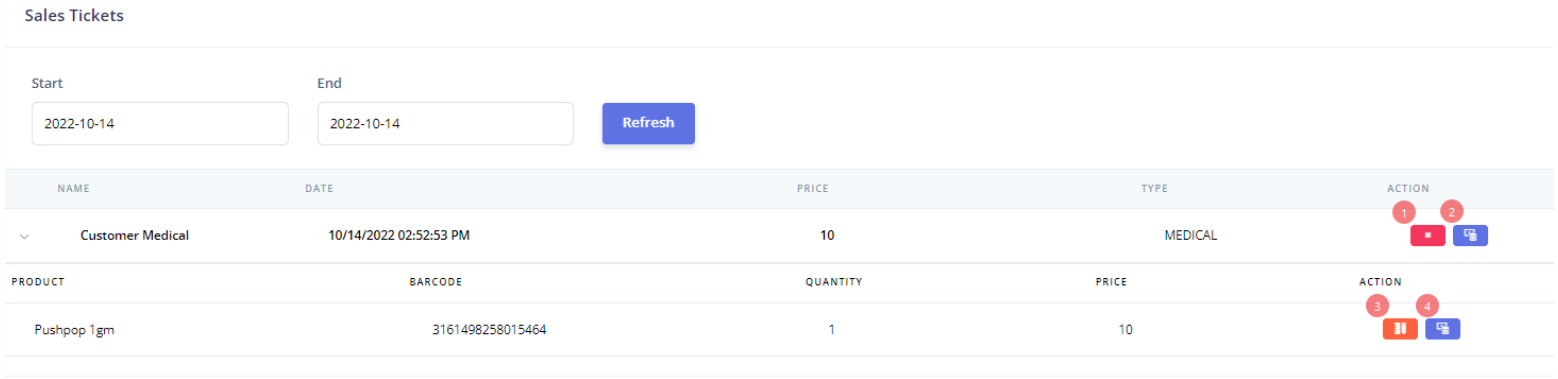


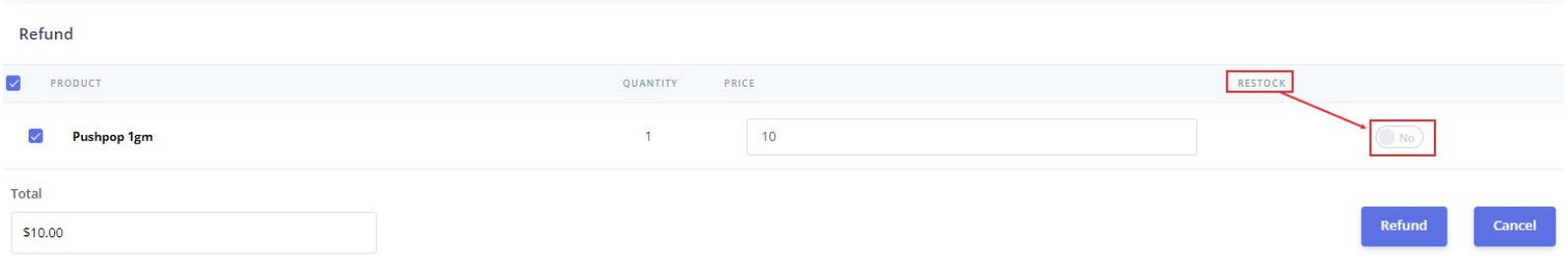
From the **Dispensing** section → **Sales** → you will see ***Tickets***. You can also filter the date range.

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

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

Void will reverse the sale action, acting like it didn't happen





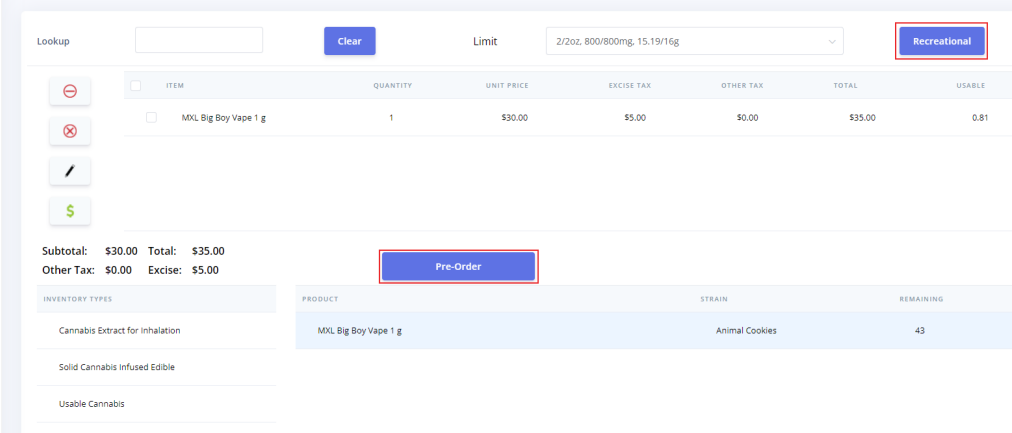
1. = Void ticket
2. = Refund Ticket
3. = Modify Price
4. = Refund Ticket

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.

Pick up Order for Adult Use Sales

Summary: How to use Pre-Order function, Adult use
Video: Med & Rec Pick-up sale

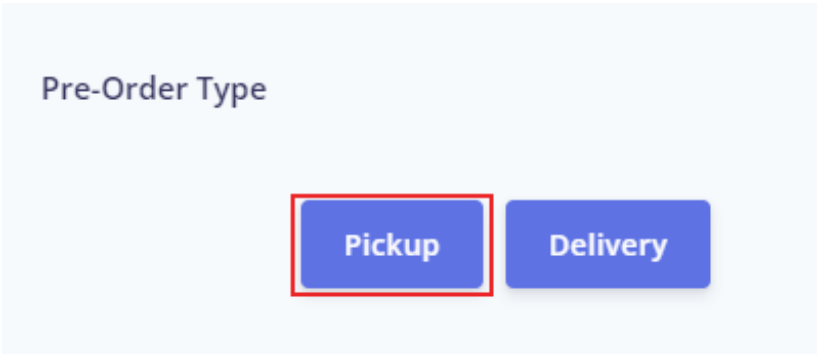
For retailers that are able to make deliveries, you will want to select the Pre-Order option on the Dispensing screen. This feature allows you to complete Delivery and Pickup sales for both Medical and Recreational customers.



Select Recreational from the toggle, add the item(s) to the ticket. Enter the Quantity, price PRE-TAX, Excise, and other applicable taxes.

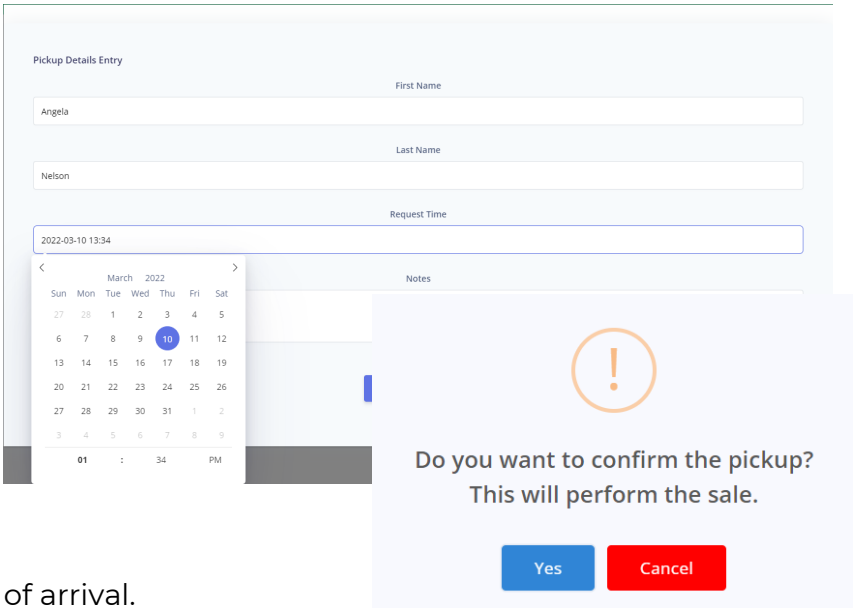
→ **You will need to manually calculate the dollar value for the tax amount.**

Once you select "Ok" the item(s) will be added to the ticket.



You will be given two options when you select "Pre Order", select "Pickup"

After selecting “Pick up”, the screen shown here will pop up. Fill out the Customers information and Request time.

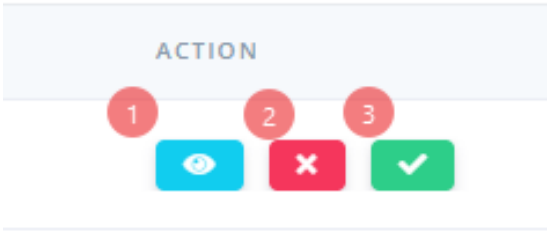


→ You must modify the time of arrival.

Confirm the Pick-up.
→ If you select Cancel, you’ll be taken back to the sales floor, tickets are not saved and you will have to start over

From the left-hand side under Pre-orders, select the option for “Pickups”. Here you will find orders scheduled for pickup, where you can void, modify, or tender out.

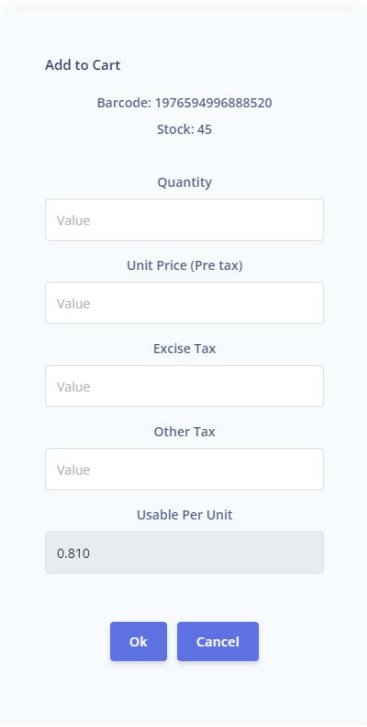
In the Pickups section you will see these three options.



1. Edit Details
2. Void
3. Complete

After completion (3), all options will go away except "Void" (2)

Pickup Order will be completed allowing you to move on to the next Pickup order.



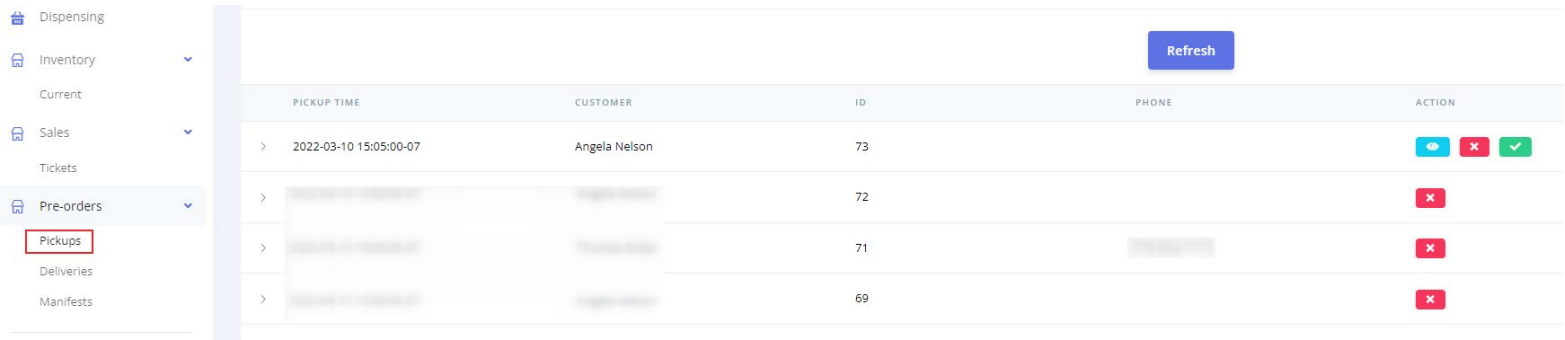
Delivery Order for Adult Use Sales

Summary: How to use Pre-Order function, Adult use, Delivery sales

Video: Med & Rec Delivery Sale

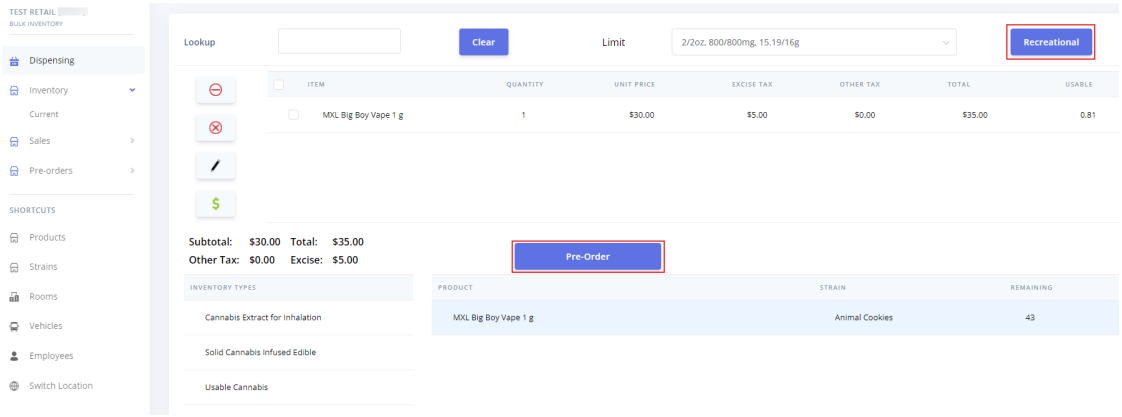
Select Recreational from the toggle, add the item(s) to the ticket. Enter the Quantity, price PRE TAX, Excise, and other applicable taxes.

→ You will need to manually calculate the dollar value for the tax amount.



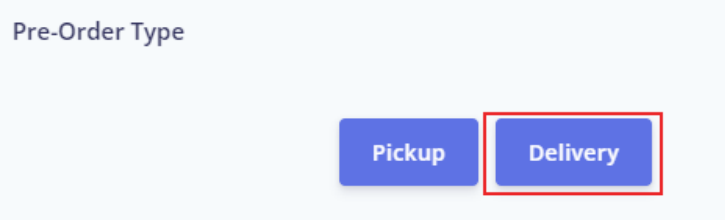
Once you select "Ok" the item will be added to the ticket.

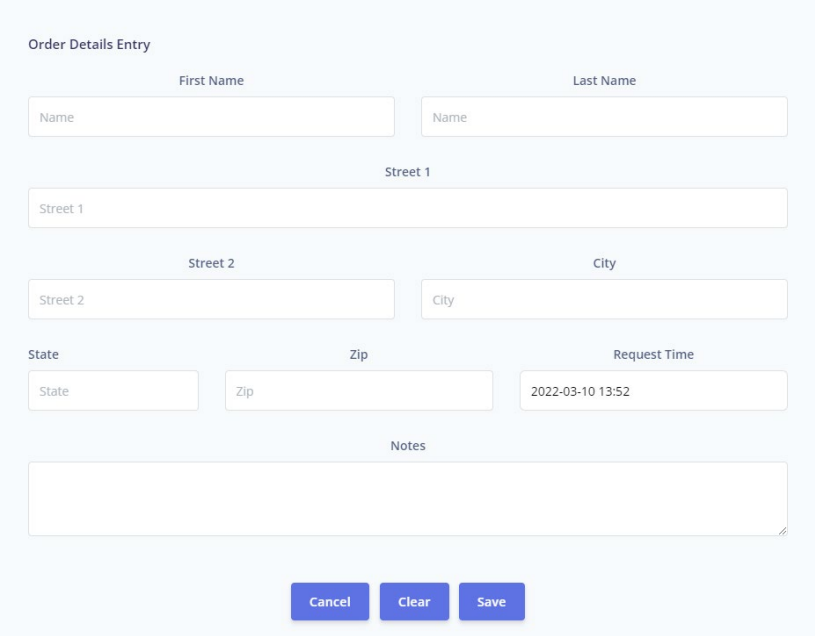
You will be given two options when you select “Pick-up”, select “Delivery”



After selecting Delivery, the Order Details Entry screen will appear. Fill out the Customer's information and Request time.

→ You must modify the time of arrival (Request time for both day and time)





Confirm the Delivery

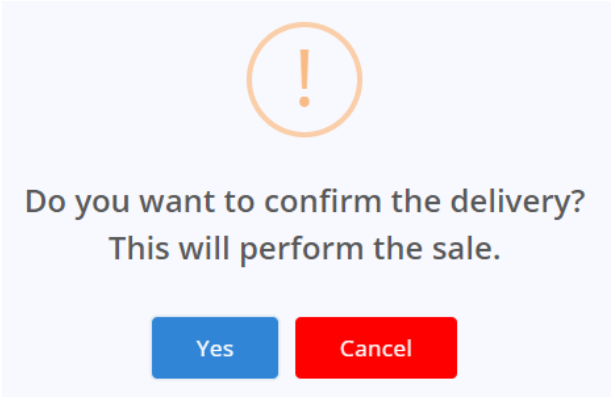
→ If you select Cancel, you'll be taken back to the sales floor, tickets are not saved and you will have to start over.

After Confirming the Delivery, from the left-hand side select "Deliveries". From here you will see all Pending or Completed orders.

1. Update Order Details

   →Update Address, Request Time, update/add Notes.

2. Create Manifest
3. Void Manifest
4. Modify Order Item



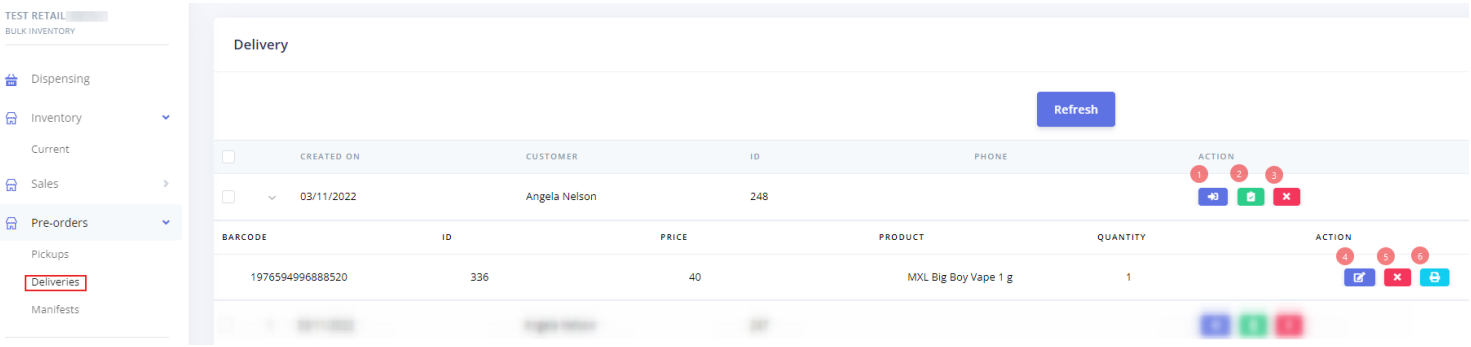
→ Update Price and Quantity

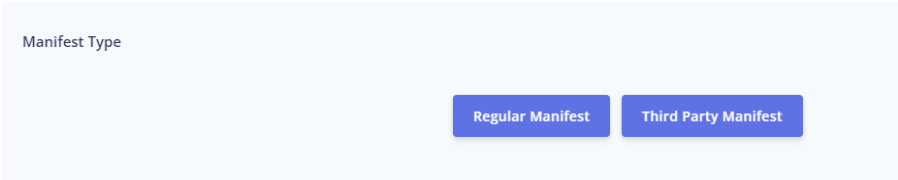
5. Void
6. Print Label

After selecting Create Manifest (2) it will ask for the Manifest Type.

→ The following will be shown for a Regular Manifest

After selecting “Regular Manifest”, the Delivery Manifest screen will appear, you will need to select the customer's name from the Destination drop down.

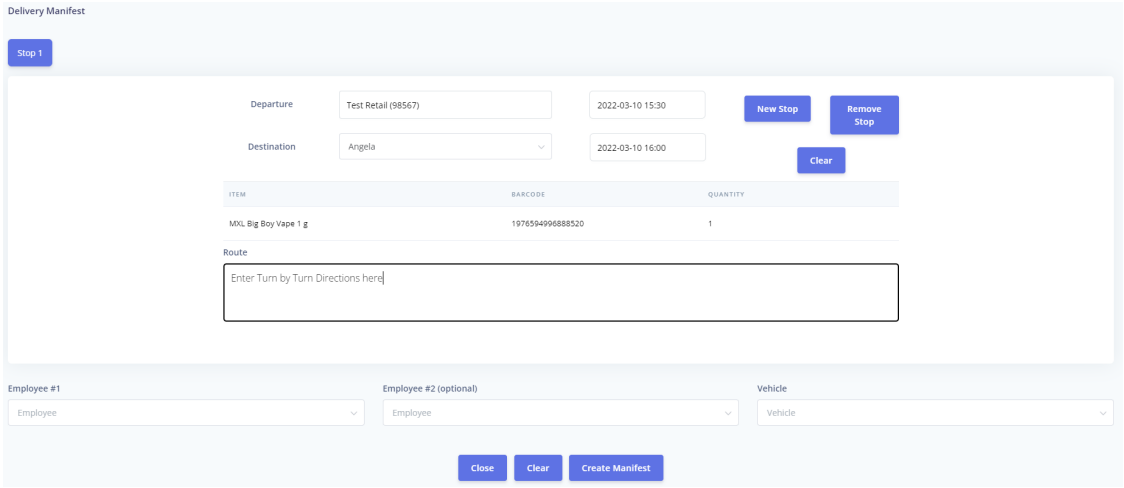




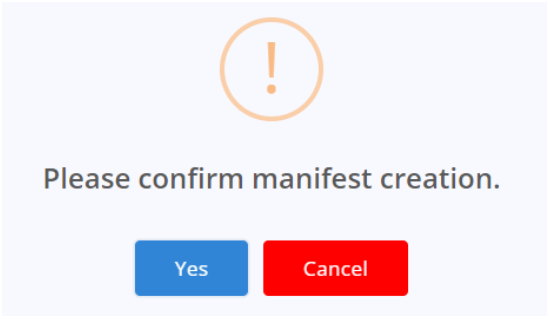
→If Google route does not calculate, giving you an error, please manually enter in the turn-by-turn directions in the Route section below.

At the bottom of the page, you’ll need to attach the Employee(s) who will be driving the product and the vehicle transporting goods.

When done select “Create Manifest”



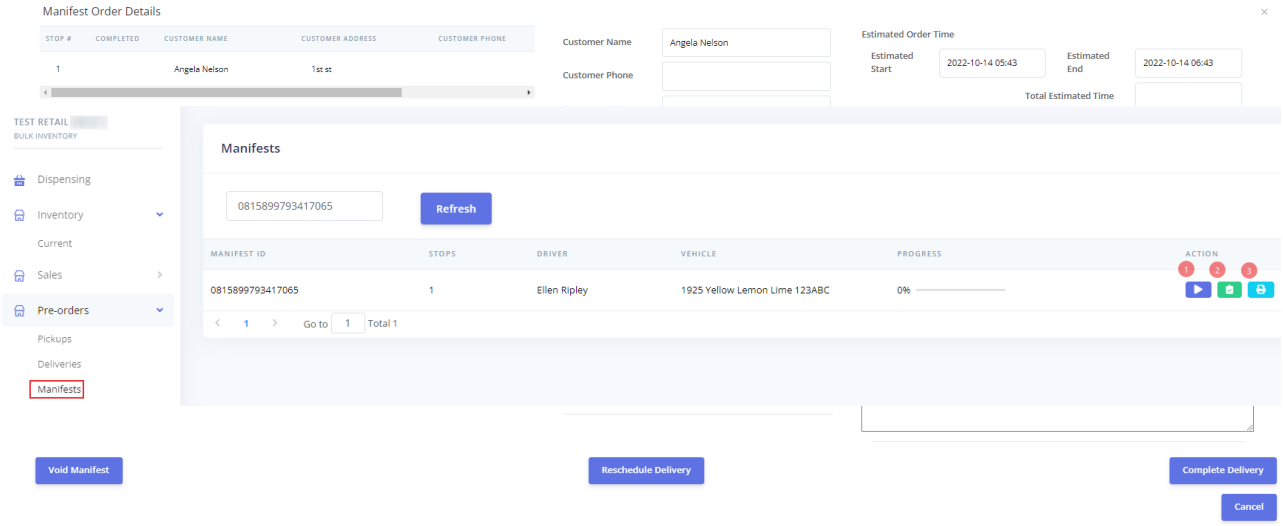
Confirm Manifest Creation



→ If you select Cancel, you'll be taken back to the previous screen and the manifest will not be created.

After Confirming the Manifest creation, on the left-hand side select "Manifests". From here you'll find all Completed and in-progress Delivery Manifests.

1. Start Manifest
2. Manifest Details
3. Print Manifest



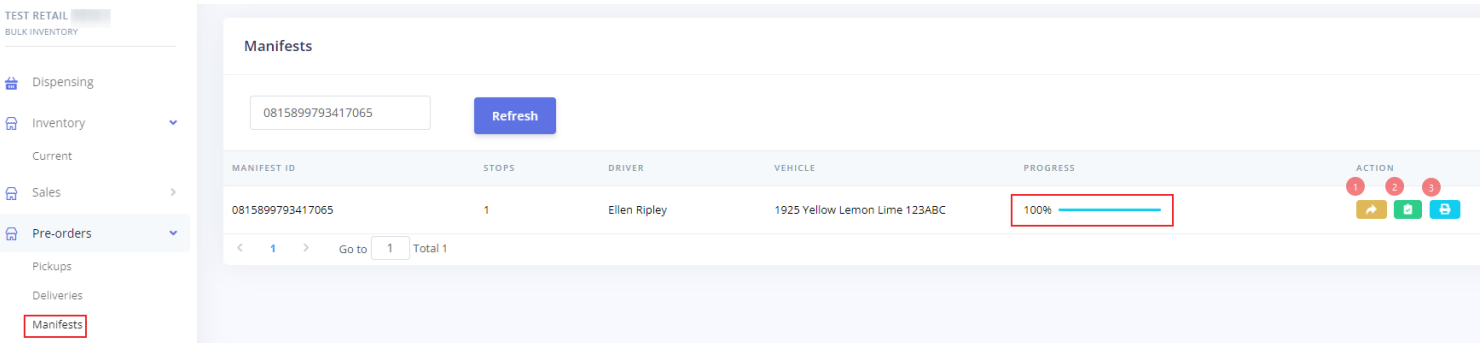
When you select Start Manifest (1) It will ask you to “Confirm Manifest Start Delivery Action '' with a prompt. After confirming the action “Start Manifest” will change to “Undo Manifest” (1). By Selecting Manifest Details (2) it will take you to the order where you can update the customer’s information, time of arrival, add any delivery notes, Void Manifest, Reschedule Delivery or simply select “Confirm Delivery”.

After you confirm the delivery, Highlighted below is a Progress Bar that will only change to 100% after selecting “Manifest Details”(2) and completing the order.

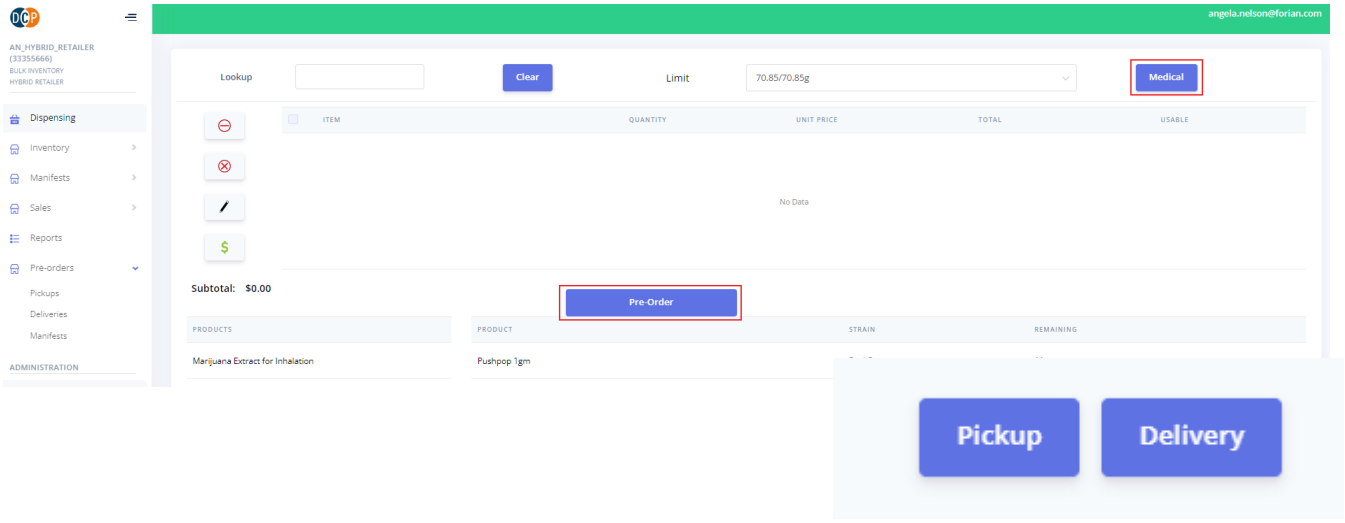
1. Undo Start Manifest
2. Manifest Details
3. Print Manifest

Pick-up/Delivery Order for Medical Sales

Summary: How to use Pre-Order function, Medical, Pick-up, Delivery



Make sure you are set as “Medical” from the toggle shown below, select the items to add to the cart, from there you can then follow the same steps for Pickup and Delivery shown in the above for Adult-Use as the pathway is the same.



FORIAN BIOTRACK

800.797.4711

6750 N Andrews Ave, Ste 325Fort Lauderdale, FL 33309

sales@biotrack.com
www.biotrack.com

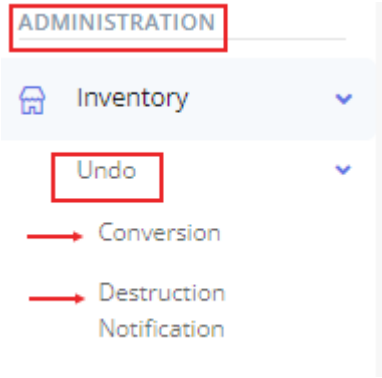
Undo Actions for Inventory

Summary: Explanation of the various undo actions available for Inventory
Video: Inventory Undo

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

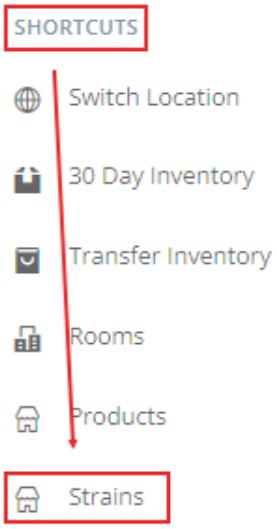
Undo Conversion = If you converted a product incorrectly, either by selecting the wrong batches/lots or entering the wrong quantities, as long as the converted item has not been modified in any way you can undo the action.

Undo Destruction Notification = If you set an inventory item for destruction and it was done incorrectly you can undo the notification, releasing the item(s).

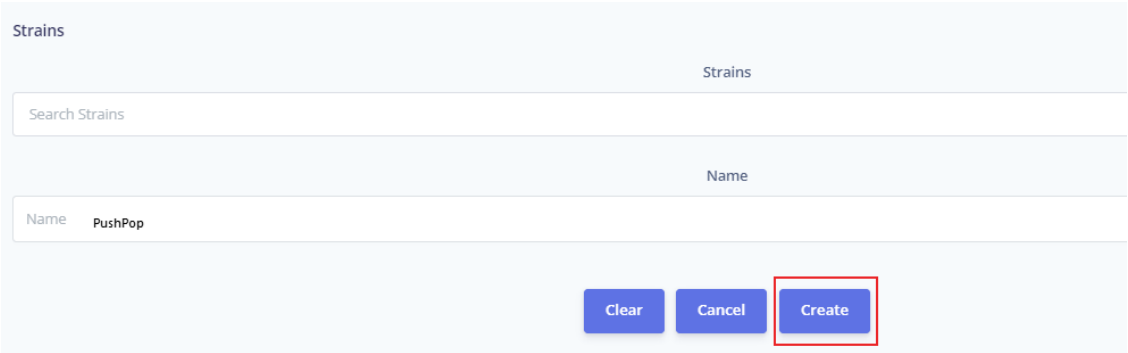


Strain Creation

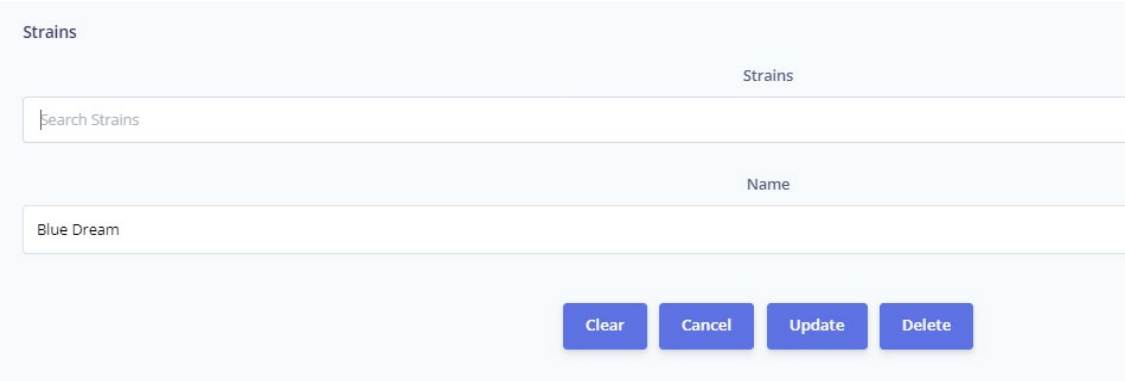
Summary: How to add, modify, delete strains
Video: Strains



By selecting “Strains” it will take you to the strain tool, this will allow you to add new strains into the system, you can also search for existing strains previously entered into the system to Update or delete.



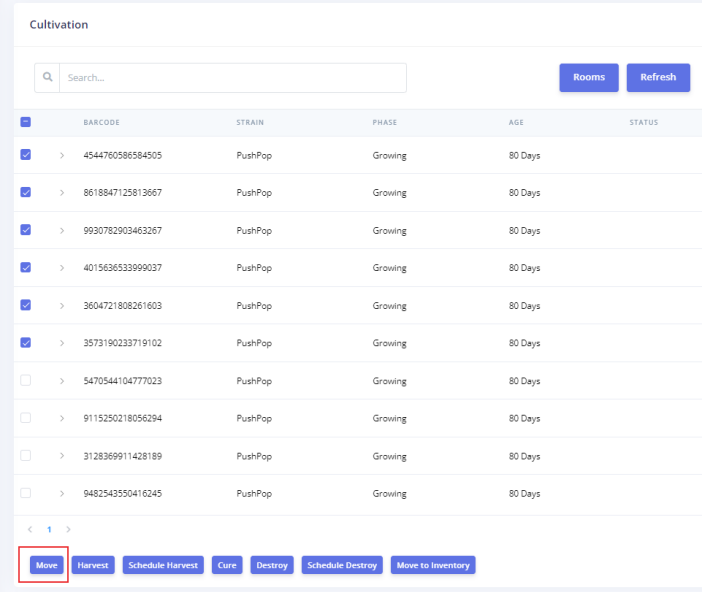
Important Notice: You will not be able to delete strains if they are attached to any existing inventory or plants.



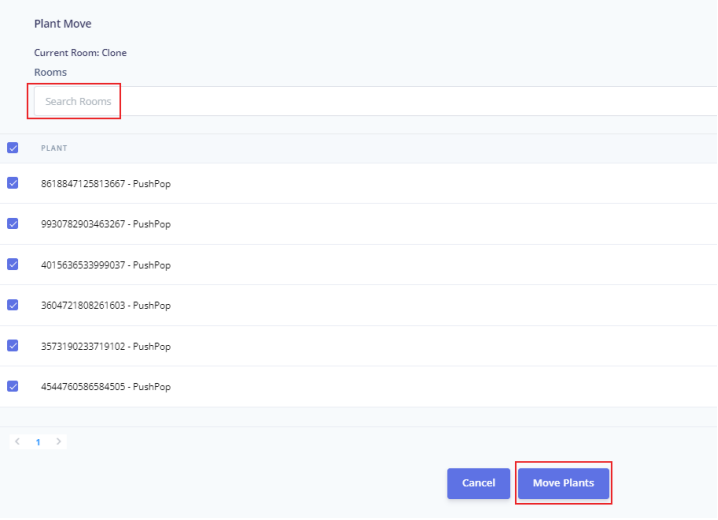
Move Action, Cultivation

Summary: Move plants, How to move plants from Cultivation room to room
Video: Move Action - Cultivation

From the Cultivation section, select a room, select the plants you'd like to move to another cultivation room. Select "Move" from the bottom.



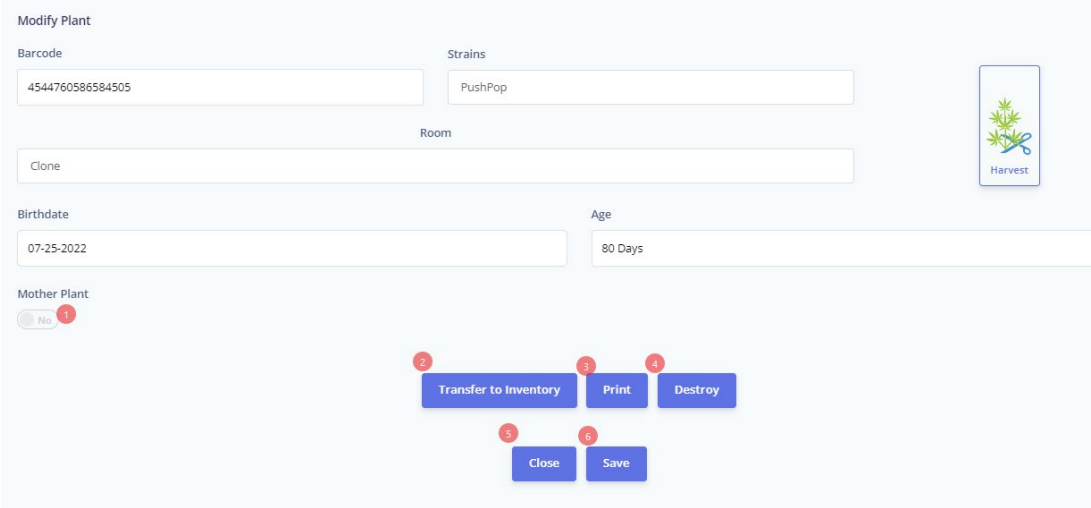
After selecting "move" the next screen will show all plants you've selected allowing you to search for a room you'd like to move them into. After selecting the new room, select "Move Plants". They will be removed from the previous room and dropped into the new.



Modify Plant

Summary: Modify plant screen, Plant information
Video: Modify Plant Screen

To access the Modify plant screen, select a plant by checking the box to the left of the plant. From there select Details. This will Bring you the Modify plant screen.



1. Mother plant = You can turn this plant into a “mother” with the toggle
2. Transfer to inventory = This will move the plant into the Inventory section
3. Print = To print or reprint the plant tag
4. Destroy = Set the plant up for destruction
5. Close = Close the screen taking you back to the previous screen
6. Save = Will save any changes made in the Modify plant section. (Room Change, Birthdate updates ect…)

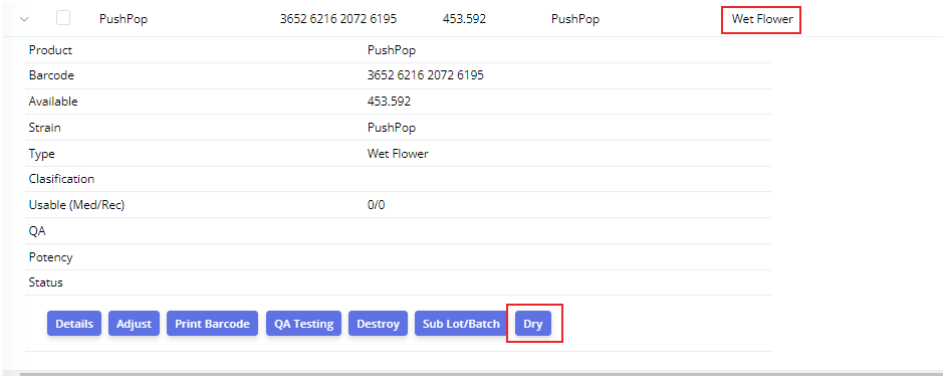
Wet Flower workflow

Summary: Wet Flower, Harvest process

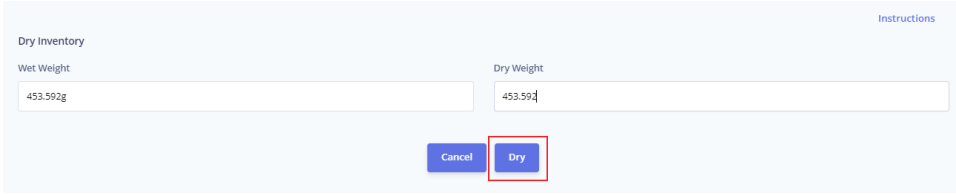
For Cultivators you can do a full or partial harvest, the workflow will allow you to create “Wet Flower”. The Wet flower will be located in the inventory section as “wet”. From there, the only way to move this product forward would be to move it along in the next stage and “dry” the flower. This will then allow the flower to be converted following the same conversion rules/processes.

Once a harvest has been initiated, select the plant(s), select harvest, select “additional collections”, enter the Flower wet weight.

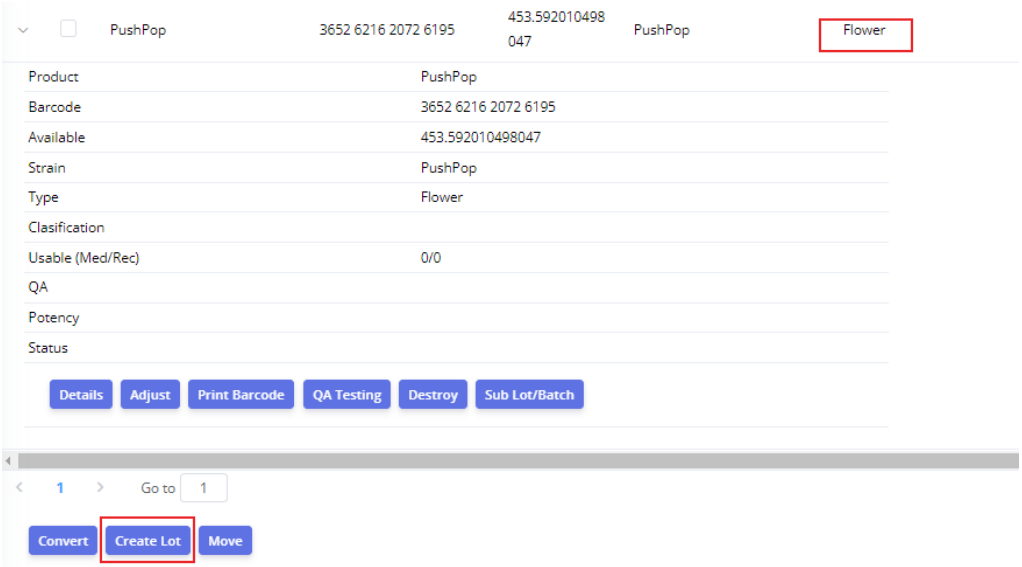
After the wet weight has been entered, an inventory ID will be created. In your inventory you’ll now see the wet flower. To move forward, select “dry” at the bottom of the screen.

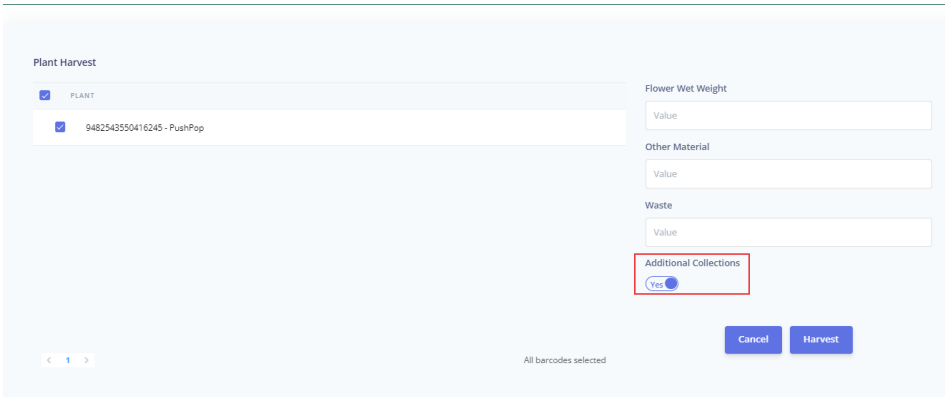


Once you select “dry” on your wet flower you can then add the weight for the flower.



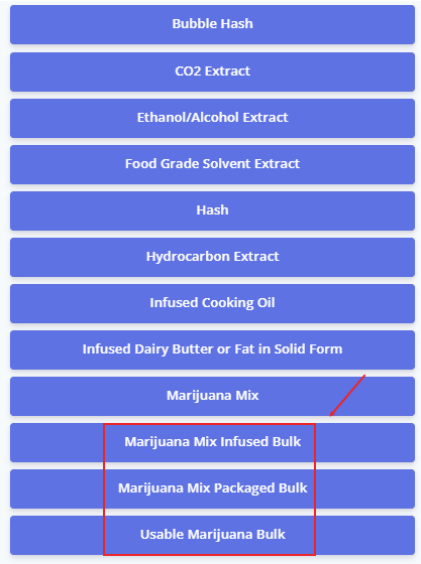
Once you have “dried” the flower, you’ll see the barcode change from “wet” to “Flower”, you can then *create a lot* and move the item forward.

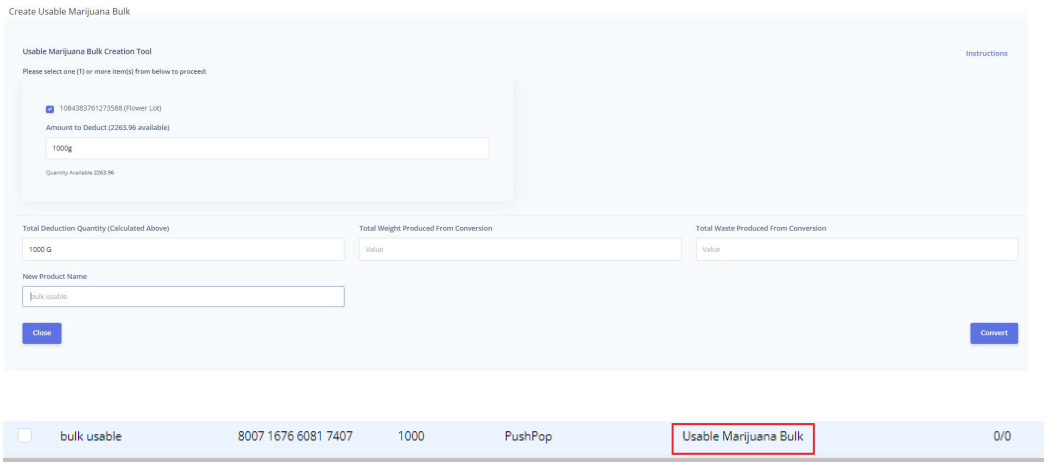




Product Packager - Bulk Inventory types

Summary: License type, Product Packager, Converting, Inventory types



The License type of “Product Packager” allows the licensee to convert ONLY to the inventory types mapped to that License type. You’ll see the inventory types shown as “Usable Marijuana BULK” as an example.

If you select an item to be converted by a Product Packager, you will have to select the correct conversion type. Once in that inventory type of “bulk”, you will now be able to manifest the item(s) to a Product Packager. From there, they will be able to take this item and create your final form.