

Volume

2

BIO-TECH MEDICAL SOFTWARE, INC.

BioTrackTHC

BioTrackTHC Manual

BIO-TECH MEDICAL SOFTWARE, INC.

BioTrackTHC Manual

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Prefix: Getting Started

Welcome to BioTrackTHC, the premier medical marijuana tracking and point of sale platform. This manual serves as a comprehensive guide ensuring that you get the most out of your new BioTrackTHC system.

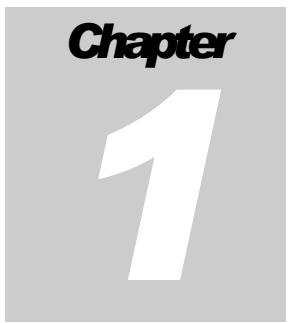
Before proceeding, please ensure that you have the latest version of this document by going to <http://server.biotrakthc.net/biotrakthc.pdf>. This document describes version 3.1.13.

To get started, please locate the installation disc that came with your BioTrackTHC system. If you cannot locate the disc, please call 800-797-4711 and request a download link. On the installation disc (or live download links), you'll find the following files:

- Server Setup.exe
 - This will be used to setup the BioTrackTHC Server.
- Client Setup.exe
 - This will be used for any terminals that require the use of a finger scanner.
- Admin Client Setup.exe
 - This will be used for any terminals which do not require the use of a finger scanner.

Once you have located these files, you may then proceed to installation. Keep in mind that your computer must be running Windows XP or greater to install. BioTrackTHC was designed to be simple, secure and easy to use. It is our hope that this manual is effective in keeping with that tradition. If you have any questions, comments or suggestions for new revisions, please do not hesitate to contact us. Thanks, and we hope you enjoy your new BioTrackTHC platform!

Terence J. Ferraro
Chief Technical Officer
Terence.Ferraro@BioTrackTHC.com

A large, light gray rectangular box containing the word "Chapter" in a bold, black, sans-serif font at the top, and a large, white, bold number "1" in the center.

Chapter

1

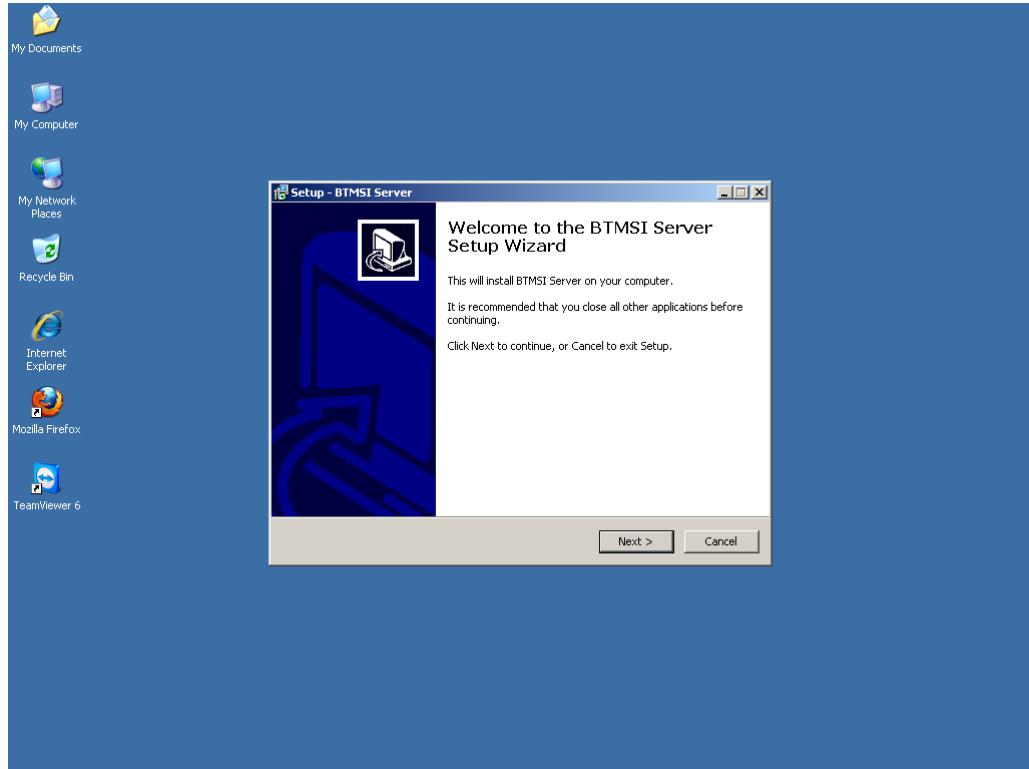
Chapter 1: Installation

In this chapter, you'll learn how to:

- ✓ Setup your BioTrackTHC Server
- ✓ Setup your BioTrackTHC Client(s)
- ✓ Initiate a successful connection to the BioTrackTHC server

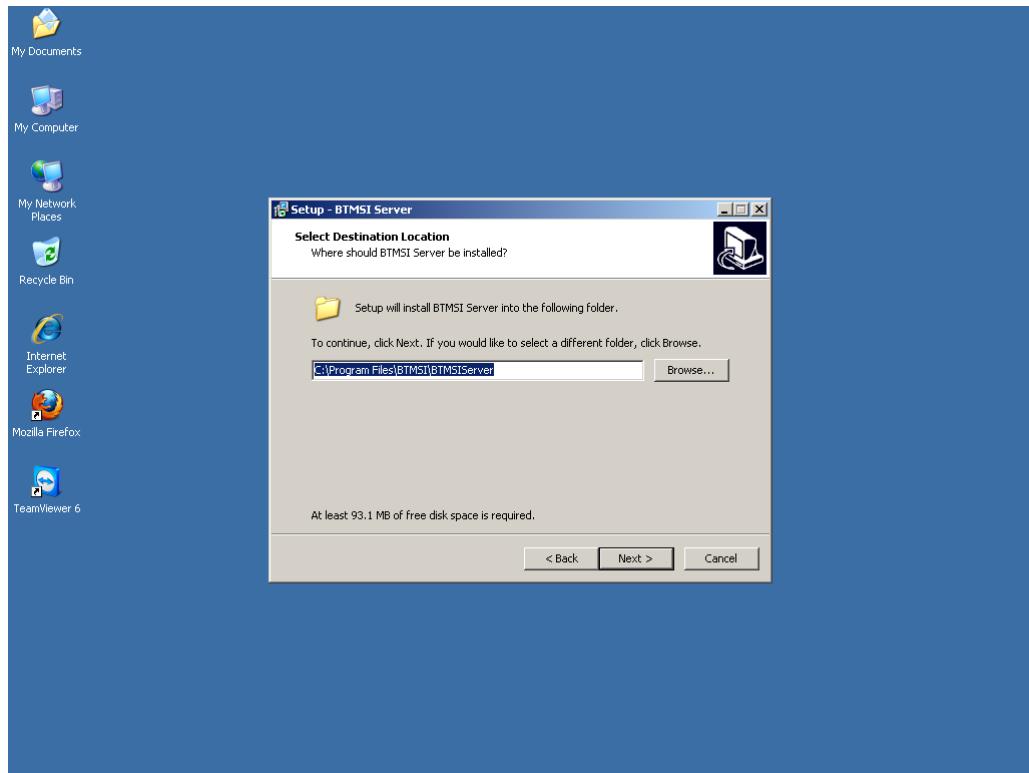
To begin, let's start with setting up your BioTrackTHC server. If you have your BioTrackTHC installation disc, you can locate the file Server Setup.exe by clicking on My Computer, then double click on the drive marked BioTrackTHC. If the file was downloaded, you will need to locate your download directory. You can most likely find this by clicking on My Documents, then clicking on Downloads. Once you have done this, you will be presented with the screen seen on the following page.

Server Setup



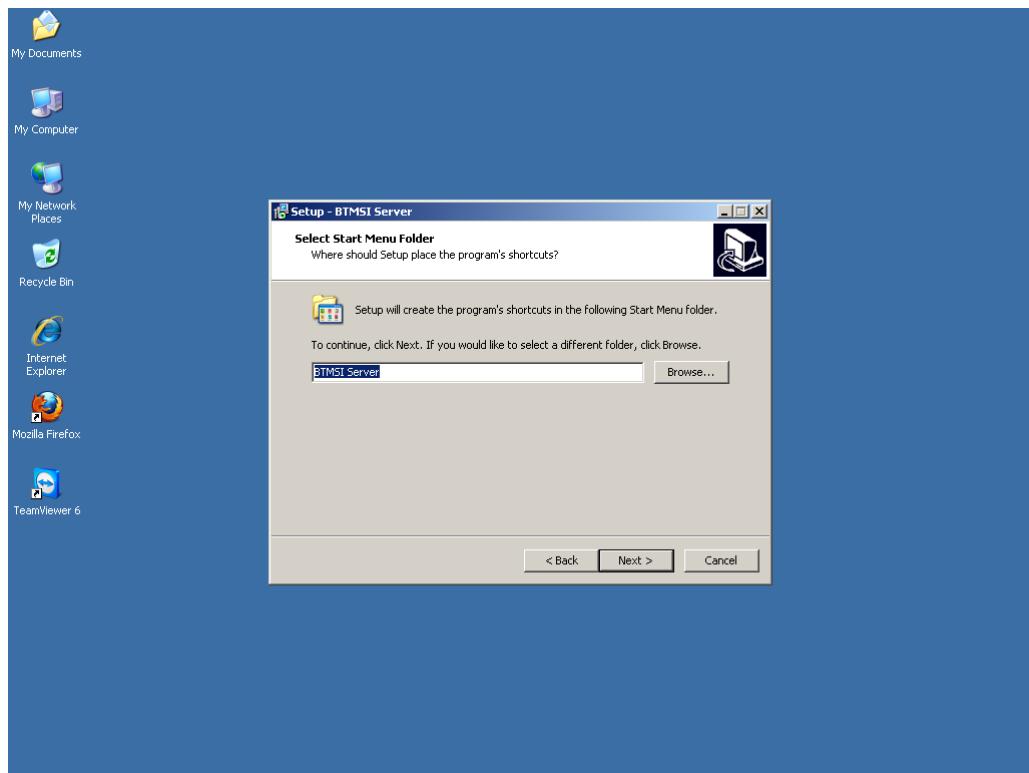
The Setup Wizard

Once the file has been double clicked, the setup wizard will appear. To proceed, click Next.



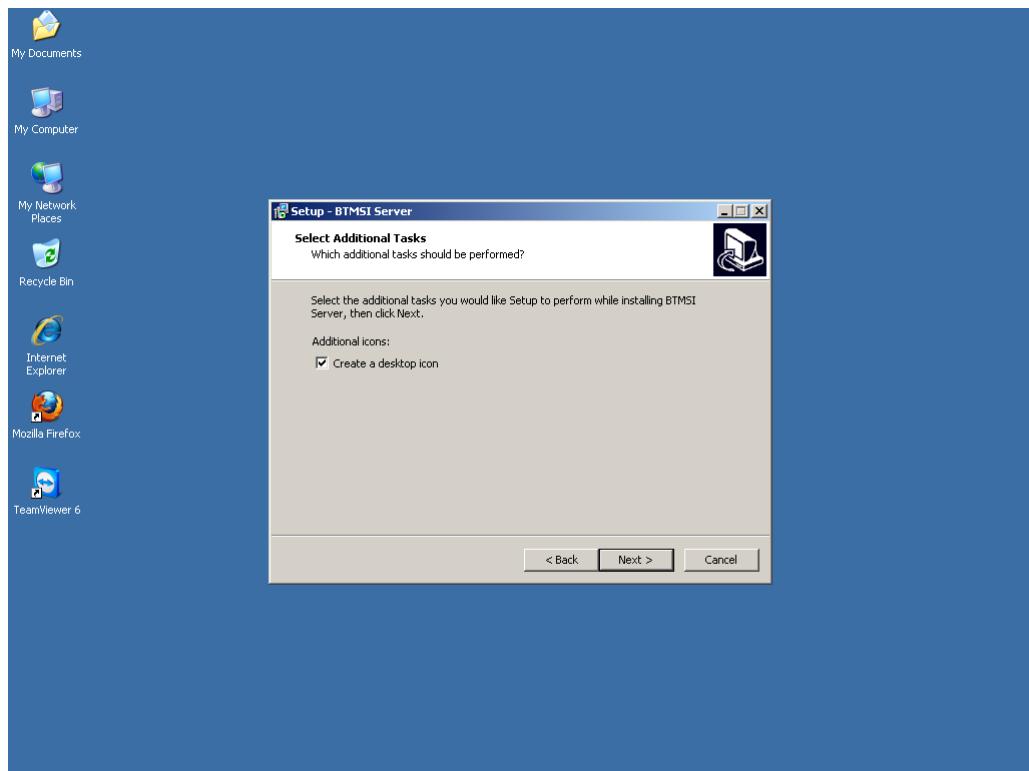
The installation directory selection screen

This screen will prompt you to select where you would like to install the server, it is recommended that you simply accept the default settings and click Next.



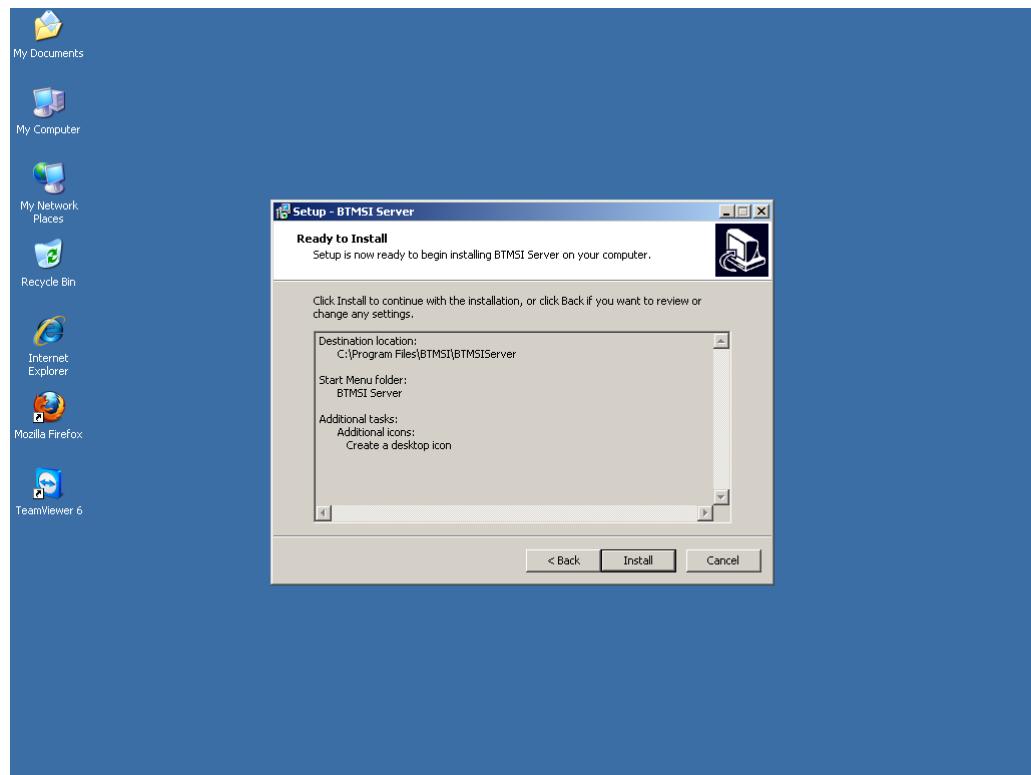
The Start Menu selection screen

The setup will now prompt you to select the name of the Start Menu folder to store shortcuts to the server. It is recommended you simply keep the default settings and click Next.



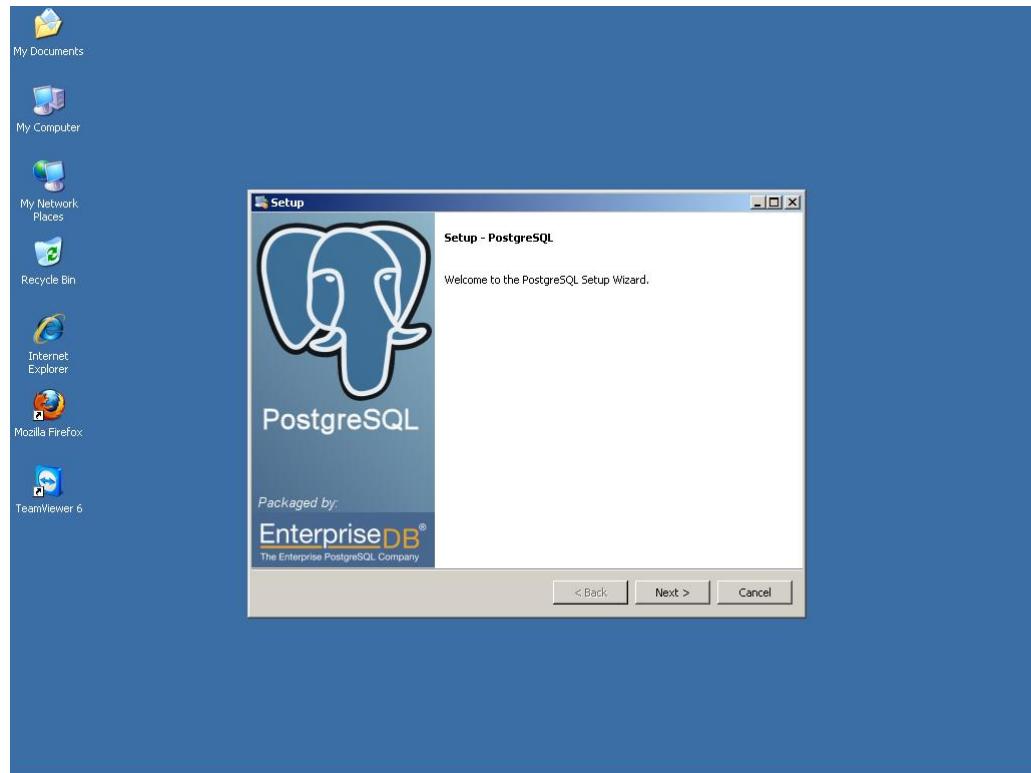
Setup Continued

The setup will now prompt whether you would like to create a desktop icon, it is recommended that you leave the default and click Next.



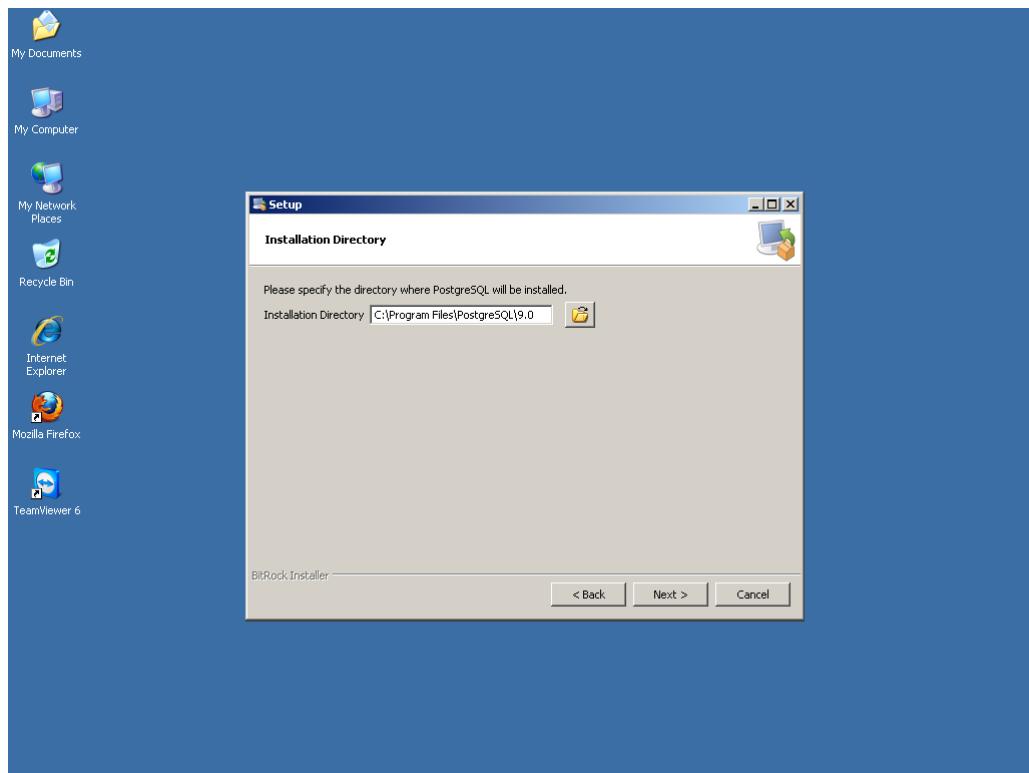
Ready to Install screen

Now the user simply needs to click **Install** to proceed.



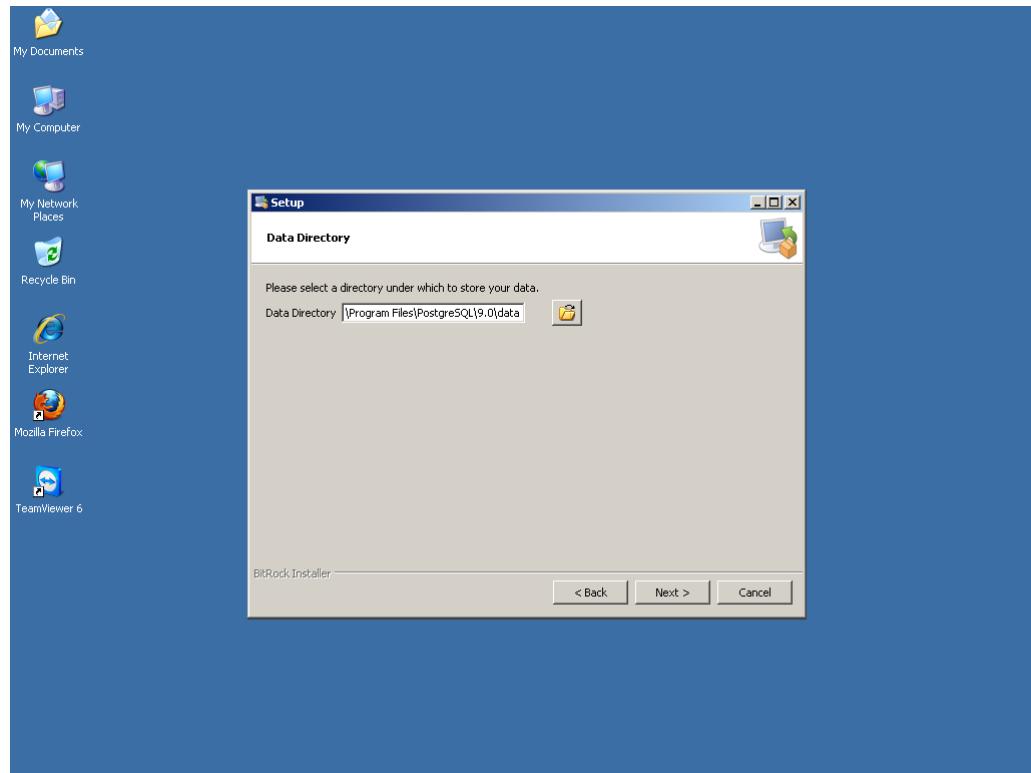
Database installation screen

The installation process will now prompt the user for options regarding the database setup. To begin, click Next.



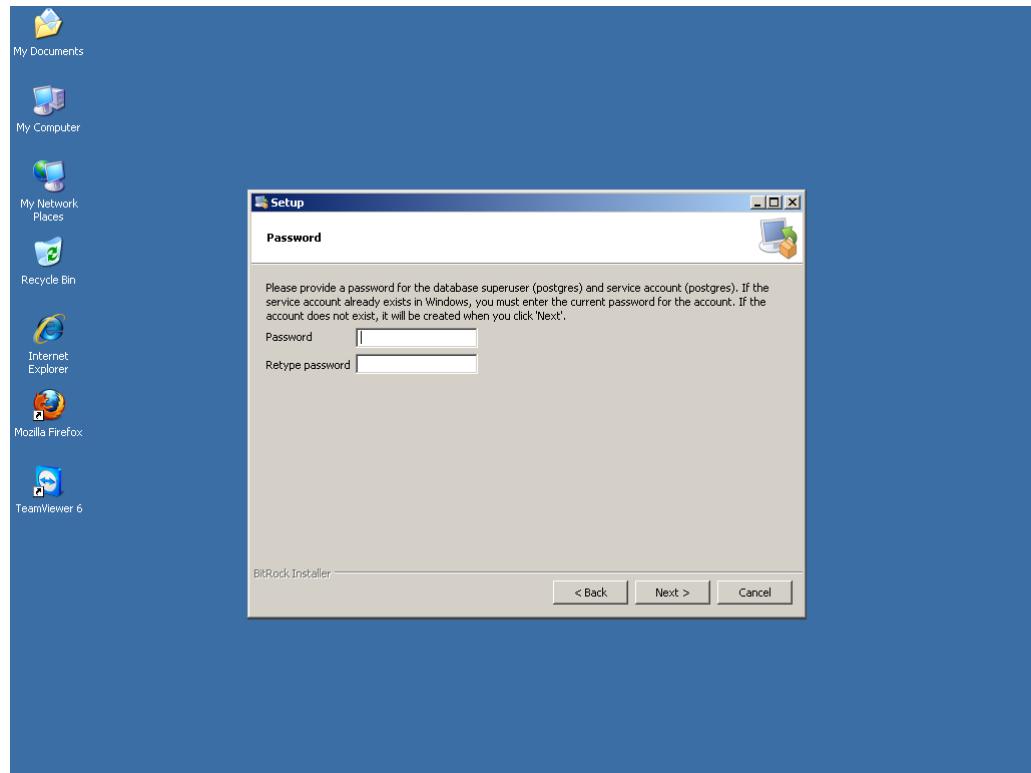
Database directory setting

The next step is to select the database directory. The default directory is recommended. Once selected, you may click Next.



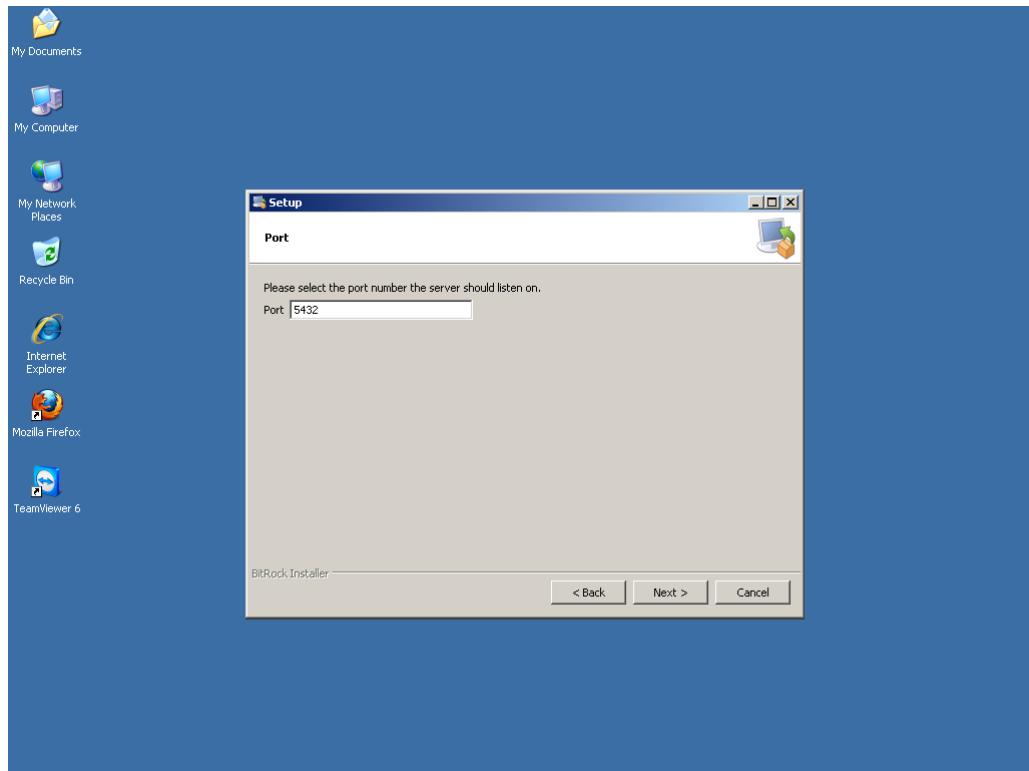
Database data directory setting

The next step is to select the data directory for the database. The default is recommended. Once selected, click Next.



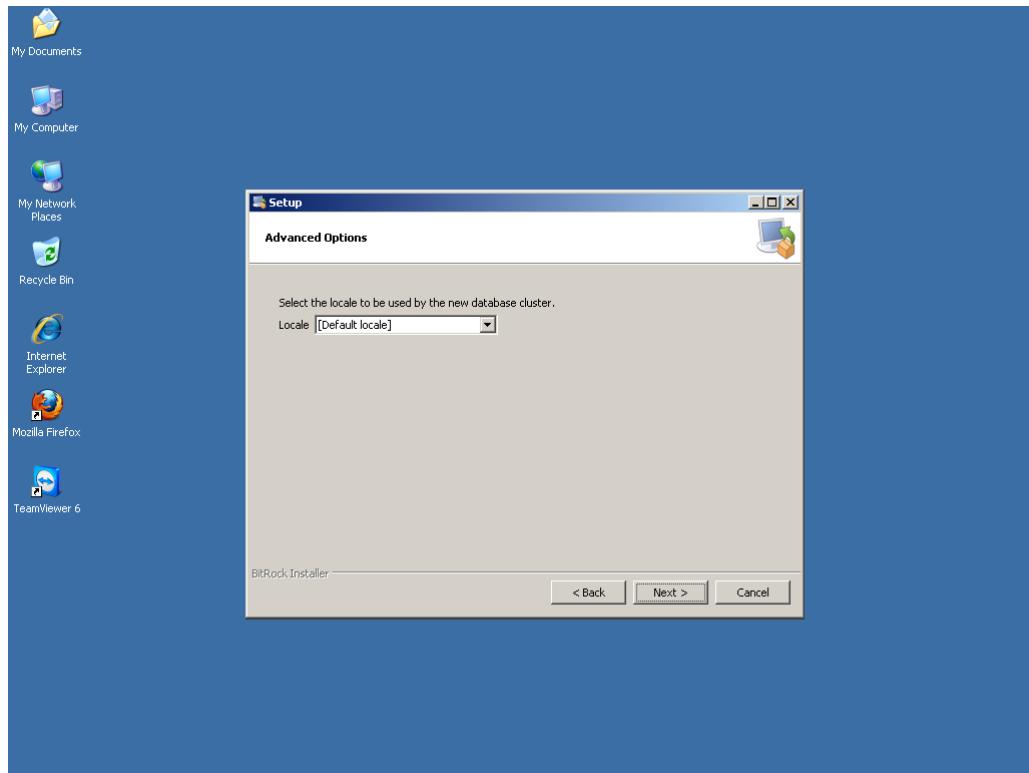
Installation password for initial postgres user

The setup will now prompt for a password for the initial database user named `postgres`. You should choose a fairly complex password as this user account will have total system access. Also, please keep this password handy as it will be used during the initial client setup. Once you have completed this step, click `Next`.



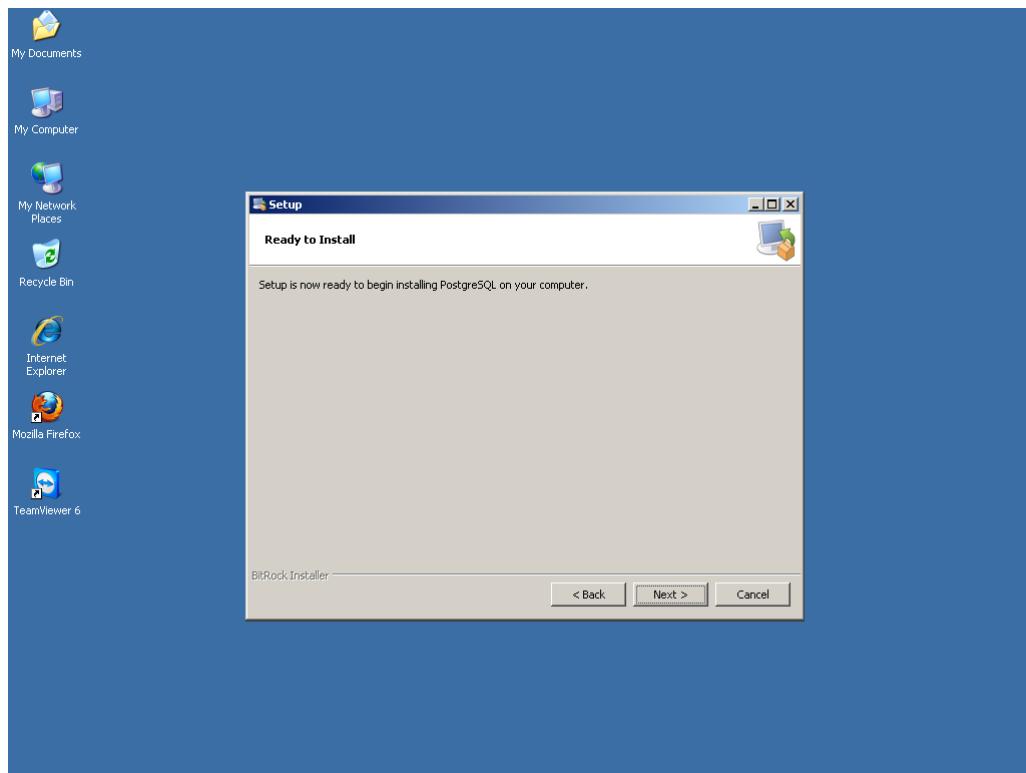
PostgreSQL port selection

The setup will now prompt for the database port. It is recommended to leave it at the default and simply click Next.



PostgreSQL database installation continued

The setup will now prompt for the database locale. The default is recommended and click Next to continue.



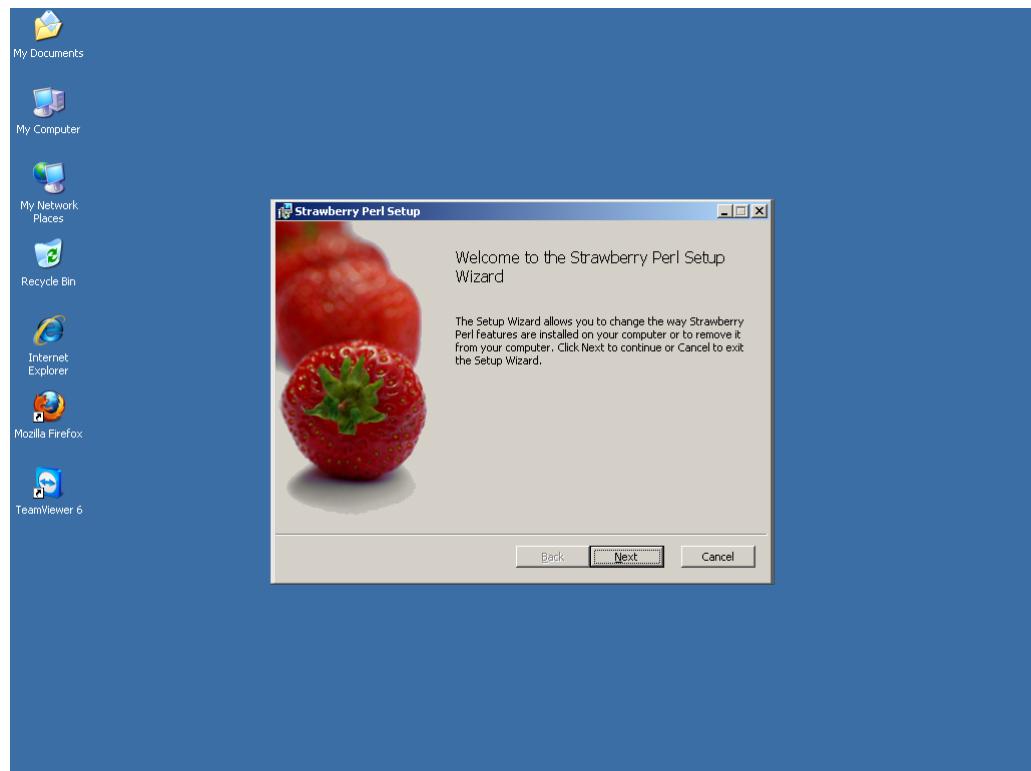
PostgreSQL database installation continued

The PostgreSQL database is now ready to be installed. Click Next to continue. This step will take a few minutes, so please be patient.



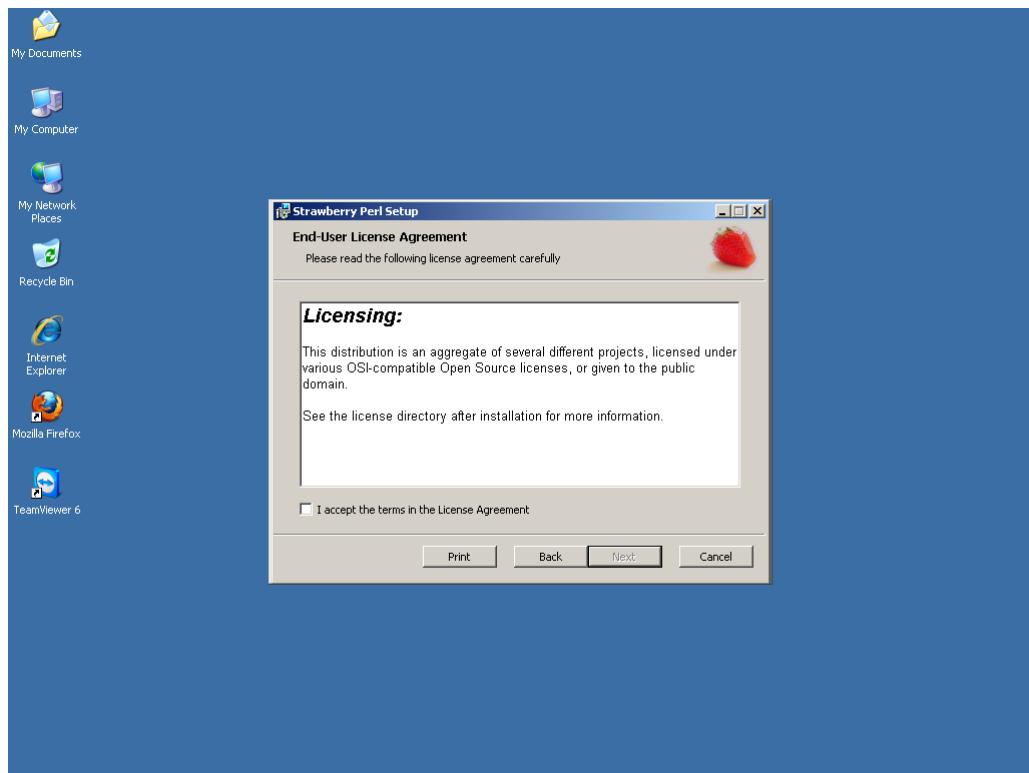
PostgreSQL setup complete

Upon successful completion of the PostgreSQL setup, the above screen will appear. Uncheck the box that reads “Launch Stack Builder at exit?” and click Finish. A command prompt box will now appear and perform minor file operations. This is normal and no intervention is necessary.



Strawberry Perl Setup

The setup will now install Perl. Click Next to continue.



Strawberry Perl Setup

Click on the checkbox that reads “I accept the terms in the License Agreement” and then click Next.



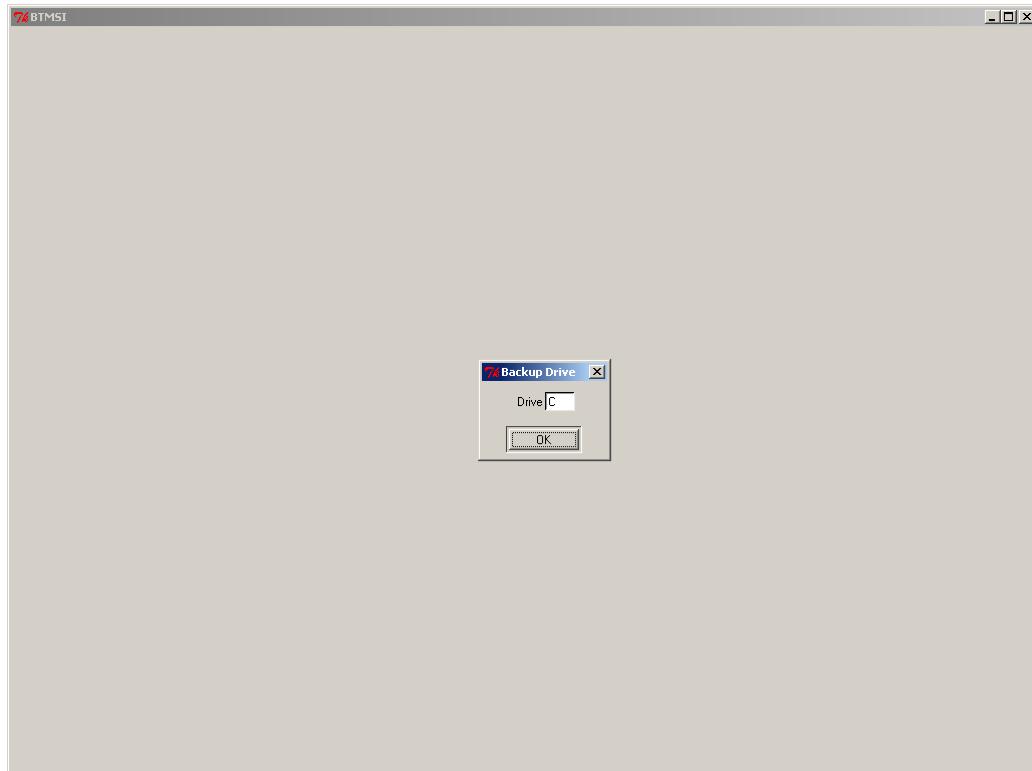
Strawberry Perl Setup

The installation is now ready to proceed. Click Install to continue.



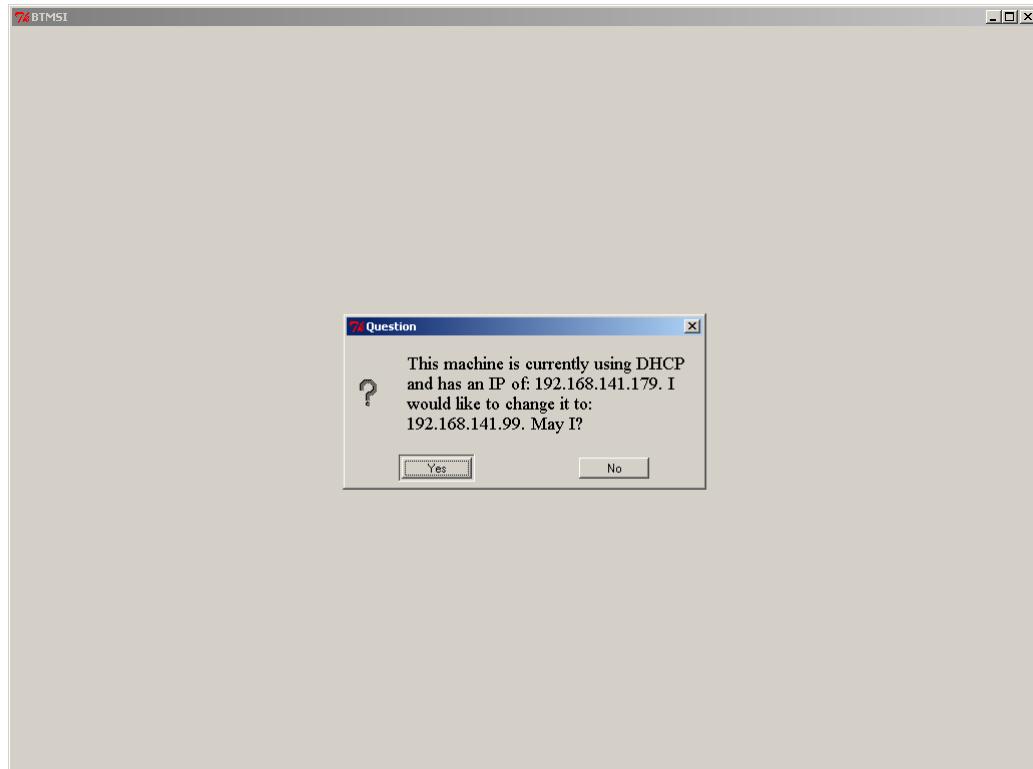
Strawberry Perl Setup

The Strawberry Perl setup has now completed. Uncheck the box that reads “Read README file.” and click Finish.



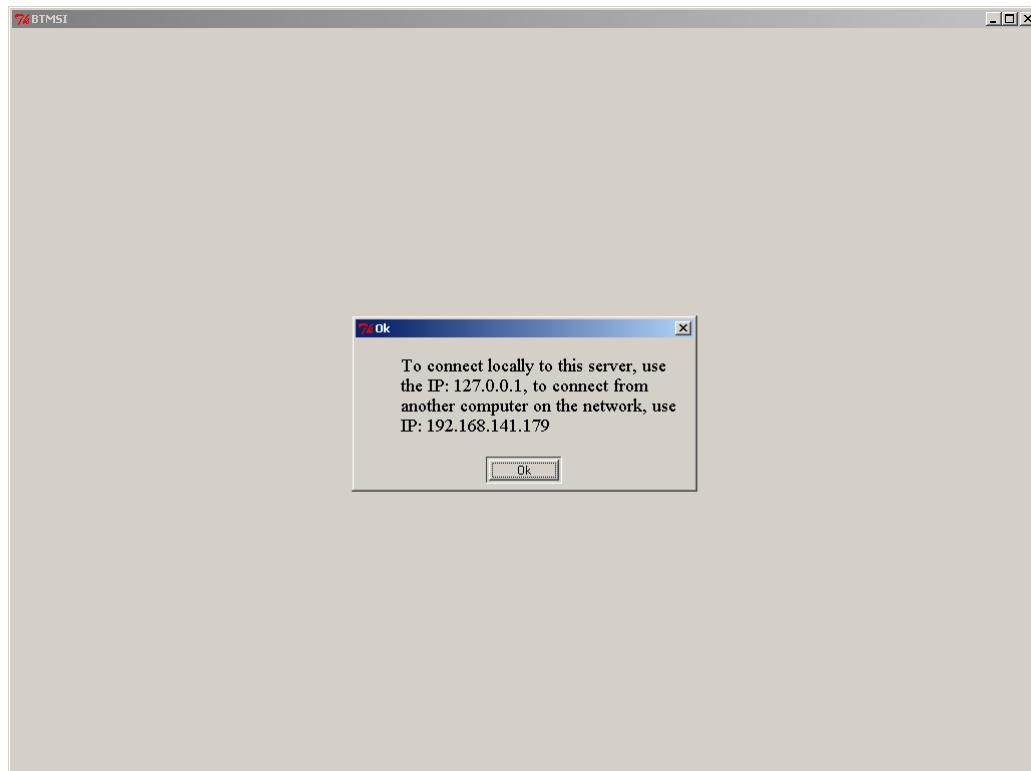
Backup Drive Selection

The final setup wizard will now prompt for the user to select the drive where the server will begin storing its nightly backups. This should be a fixed internal drive; the system will, by default, copy the backup to additional external drives once the backup has finished copying. To leave the default, simply click OK. This step may take a few minutes to complete.



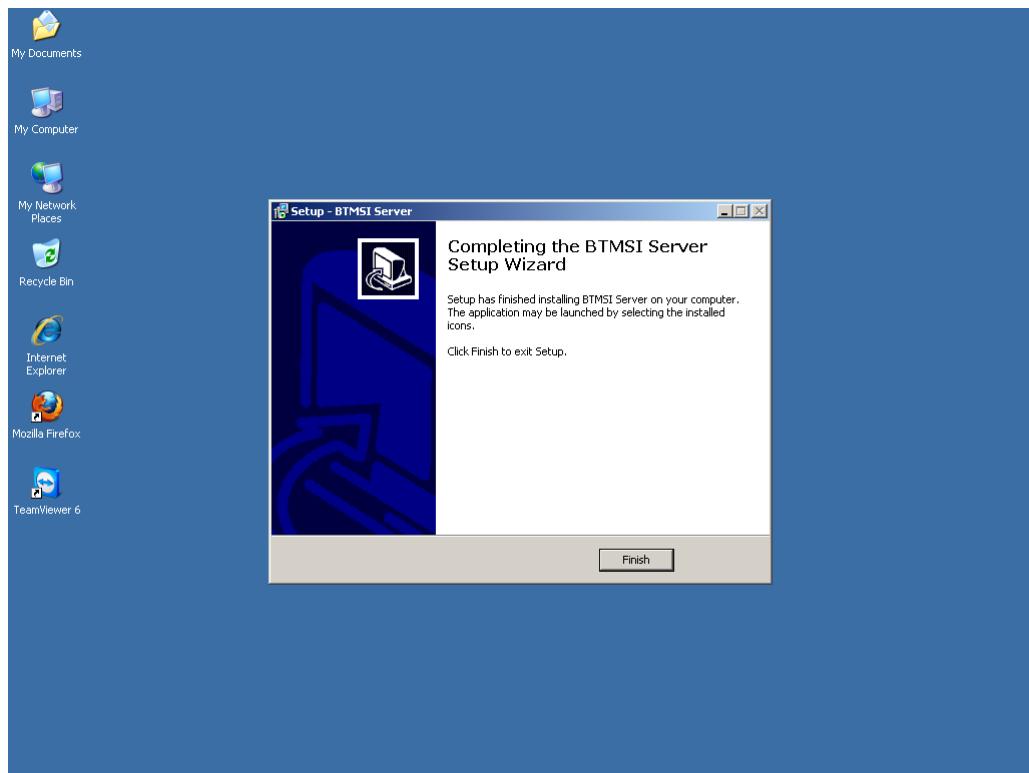
IP Configuration

If the installation is being setup on a dedicated server, the system will attempt to determine a suitable static IP address to ensure any and all clients are able to access the database regardless of router settings. Clicking No will keep the settings as they are and can always be manually configured later. Also, if only one client will be installed and the client is on the same machine as the server, clicking No is acceptable. Otherwise, click Yes to proceed with the new settings.



Server IP Settings

Once this portion of the setup has completed, the system will report the current IP address that will be used from other clients on the same network. Click OK to proceed.



Server Setup Completion

The server setup has now been completed and you may click Finish.

Database Backup Options

The server will, by default, store database backups into C:\pgbackup. Once a nightly backup has completed, the system will, by default, copy the backup file to the root directory of any and all external drives connected to the system. This allows an administrator to easily swap out external drives and keep offsite backups.

To disable the feature of copying to external drives, you can edit the file settings.ini located in C:\Program Files\BTMSI\BTMSIServer (Or, if the server is Windows Vista/7 it will be located in C:\Program Files (x86)\BTMSI\BTMSIServer). The file will only contain one line with the letter C (the backup drive, by default). By adding a new line with the number 1 in it, the external copy feature will be disabled.

A third line can also be added to the settings.ini file. This line controls whether or not the database backups are encrypted. By default, they are not. By adding a passphrase as the third line within the settings.ini file, the system will automatically start encrypting the backups using industry standard AES-256 bit encryption. Encrypting the backups ensures that if the nightly backups are taken or stored offsite, they are completely

secure. Using encryption also enables a user to share the backup folder with an online backup service such as DropBox, iBackup or similar services offered by many ISPs.

Note

When choosing a passphrase for encrypted backups, it is recommended to create a passphrase at least 20 characters in length. A weak password virtually removes the security offered by encryption. An easy way to create a complex password is to create a sentence as the passphrase. E.g.: thisisaverycomplexpassphrase

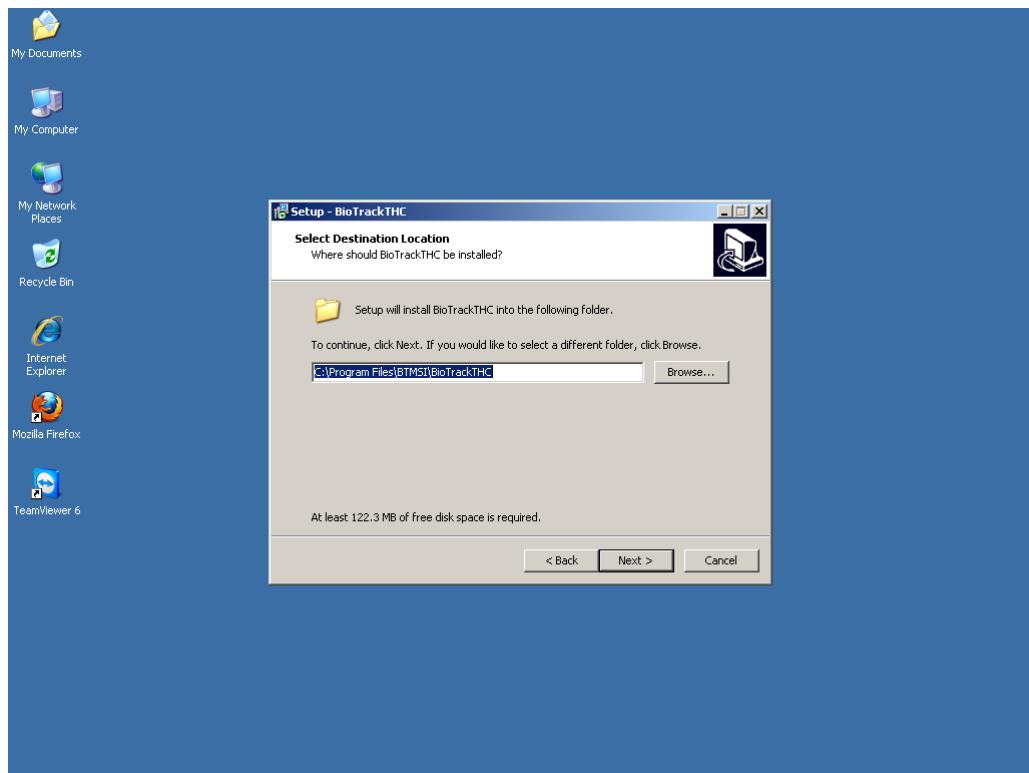
Client Setup

If the client being setup requires a finger scanner, you will want to launch Client Setup.exe, otherwise use Admin Client Setup.exe to proceed.



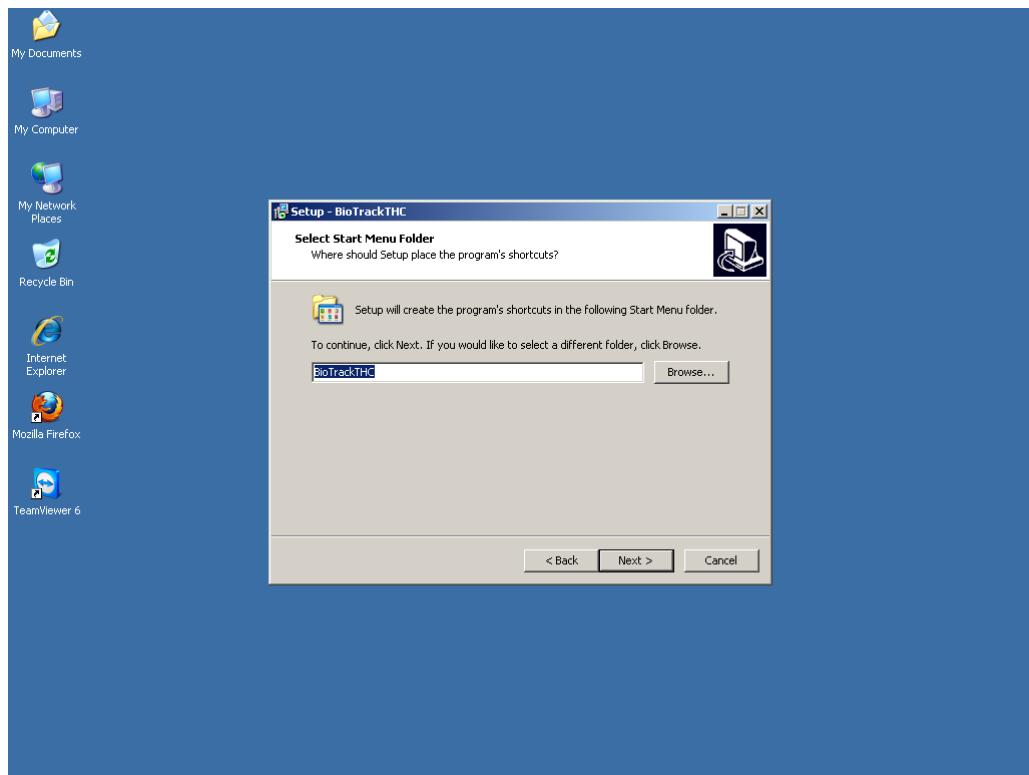
BioTrackTHC Client Setup screen

To proceed, click Next.



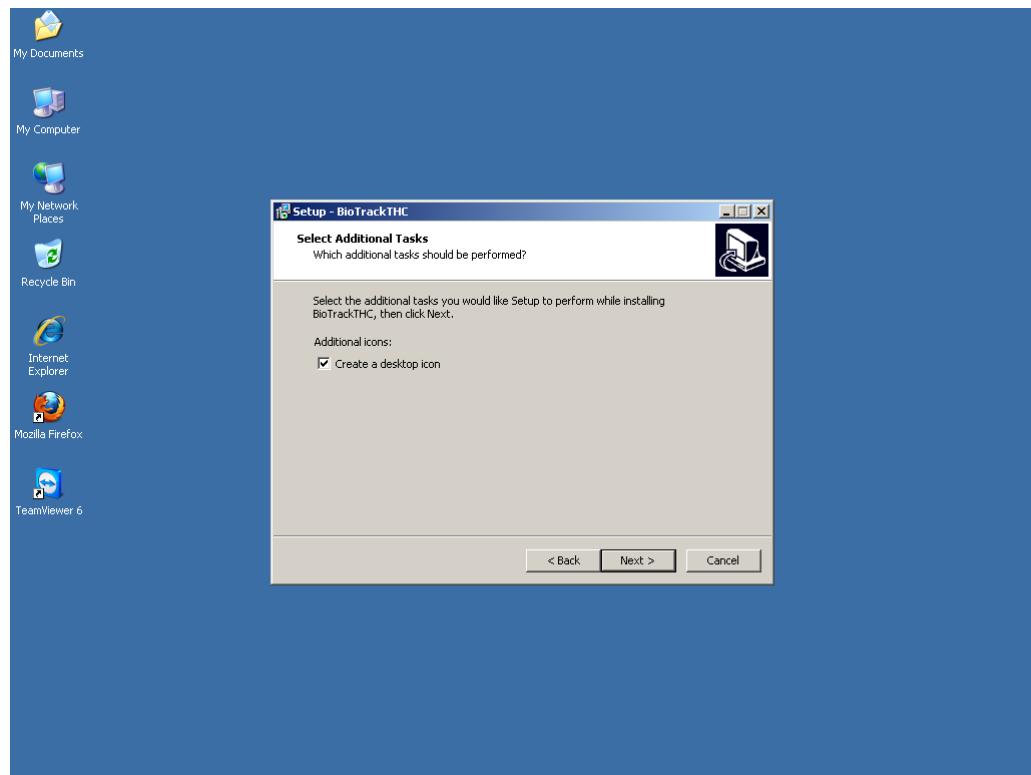
Installation Directory

It is recommended to keep the default installation directory and click Next.



Start Menu Folder

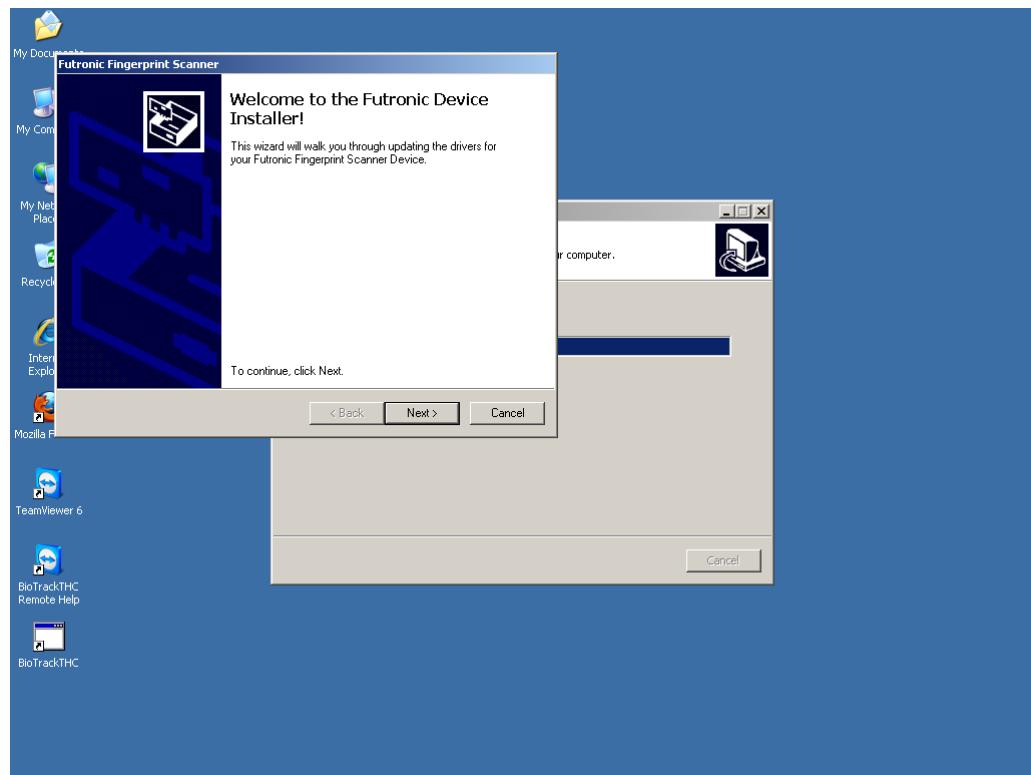
It is recommended to keep the default Start Menu folder and click Next.



Setup continued

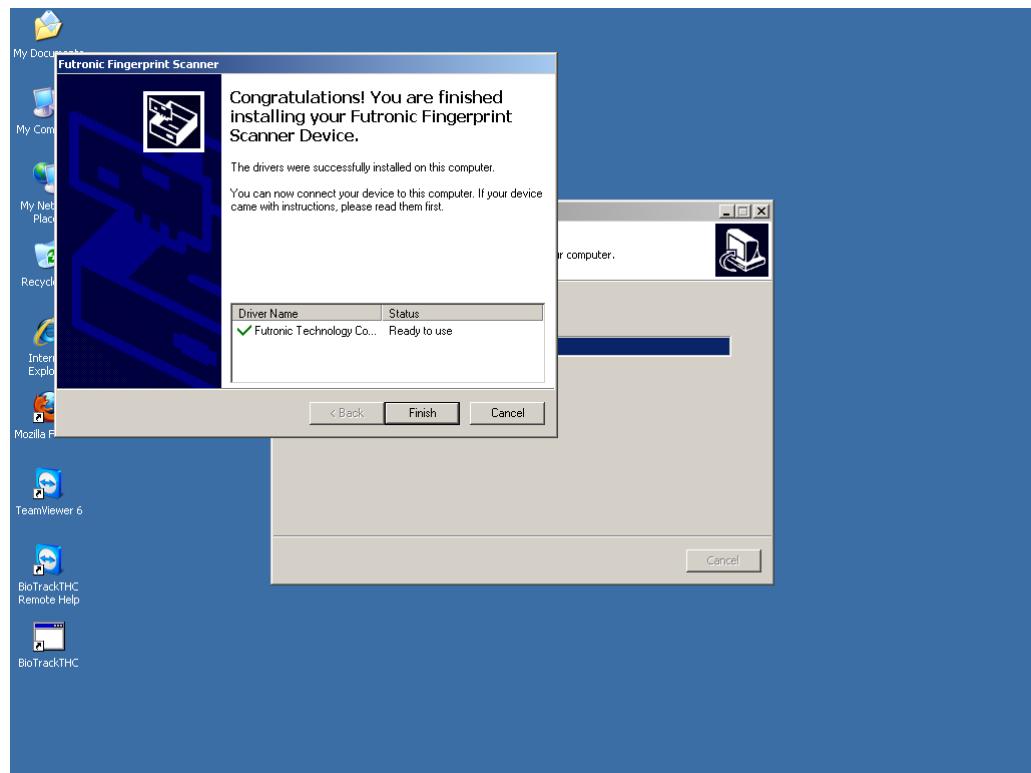
The setup will now prompt to create a desktop icon, it is recommended to keep the default and click Next.





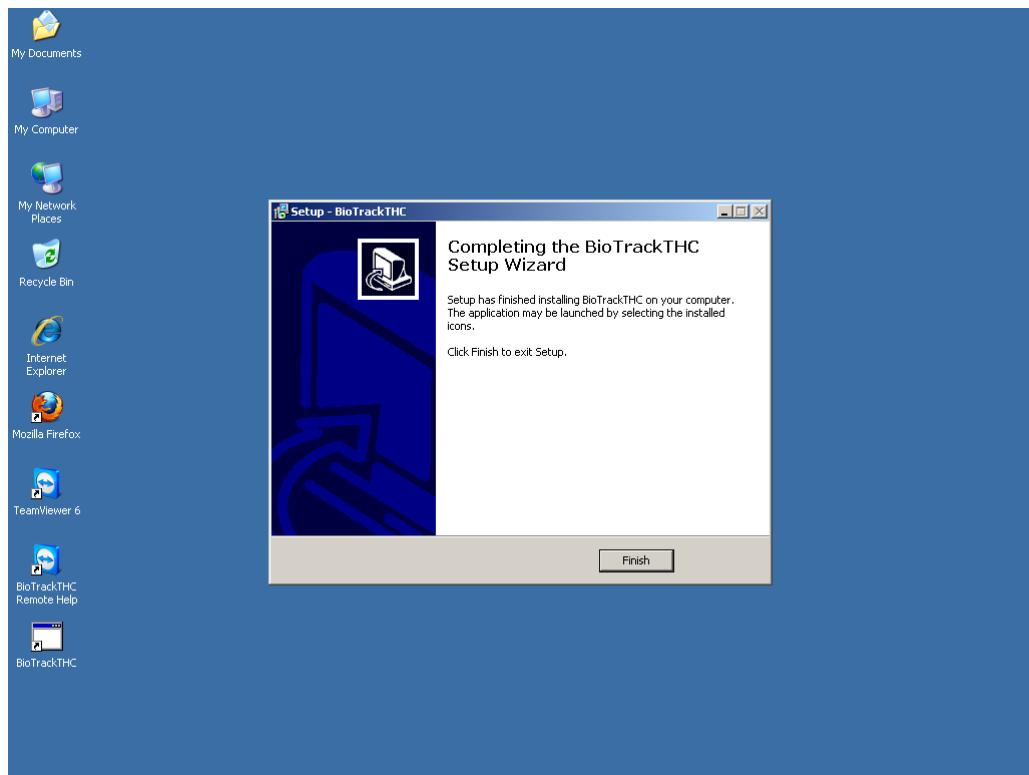
Finger Scanner Device Installation

The finger scanner installation will now prompt to install the finger scanner software. You may click Next to proceed.



Finger scanner installation complete

Once the finger scanner drivers have installed, click Finish to proceed.



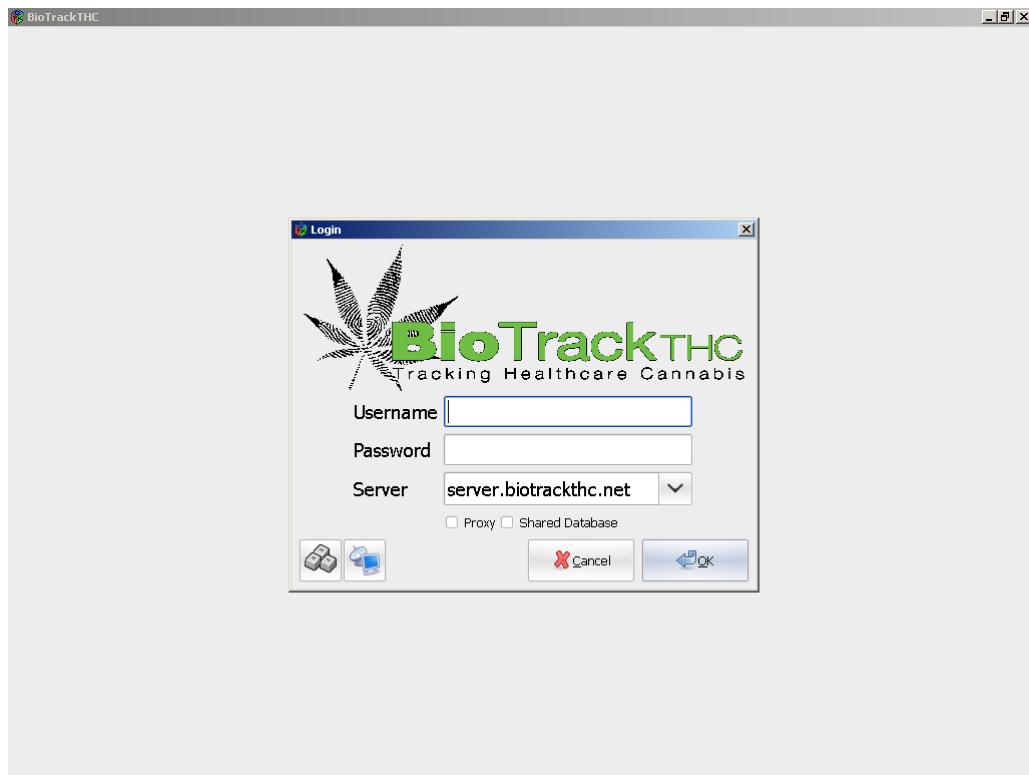
Setup Complete

The BioTrackTHC Setup has now been completed and you may click Finish.

Client Settings

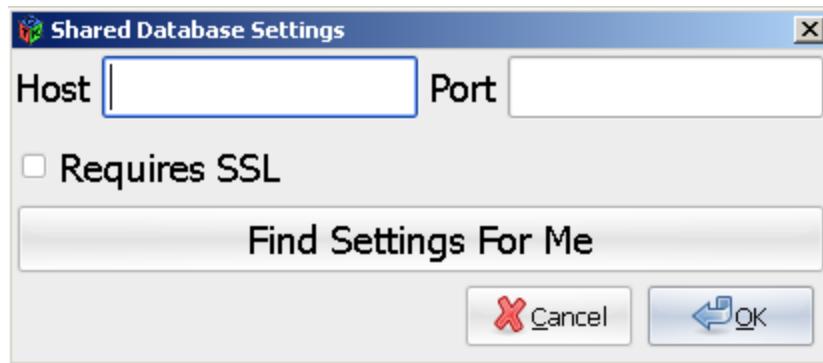
Now that the client has been successfully setup, it's time to initiate the first connection. If the terminal requires a finger scanner, please connect it now. It may take a moment for Windows to initialize the device. If the device was connected before the setup was run, a reboot will be necessary.

To begin, navigate to the Desktop and double click on the item named BioTrackTHC. This will bring up the BioTrackTHC login screen:



BioTrackTHC login screen

First, we will need to complete the one-time process of pointing the client to the local server. That can be accomplished by clicking on the checkbox named Shared Database. Once clicked, the system will ask for a Host, Port, and a checkbox that reads Requires SSL.



If the server is on the local network (or on the same machine), which is the most common setup, you may click on Find Settings For Me and the software will attempt to locate the server on your network. This process may take a few minutes, so please be patient.

If the client cannot locate the server and it is on the same network, then it is possible that a firewall or antivirus is blocking the connection, either on the client or the server. In this case, you will need to contact your network administrator for further help.

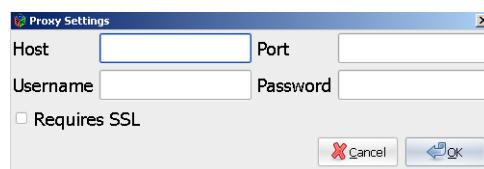
Once suitable connection settings have been found, click OK to save these settings. You will not need to enter them again.

Next, you will need to enter the initial login information to connect to your database. By default, the username will be `postgres`. The password will be what was chosen earlier during the Server Setup process. If the terminal requires a finger scan, you may scan a finger after entering the username and password. For the initial user, the system will accept whatever finger is scanned on the first login, but will require that finger for access thereafter.

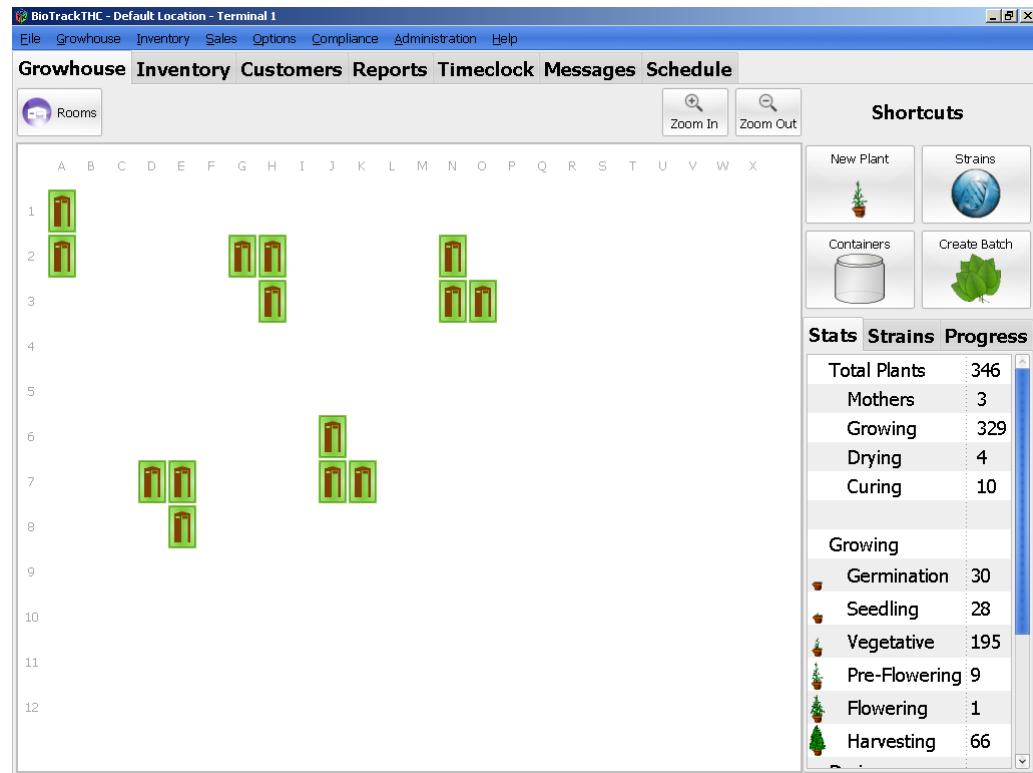
The initial connection will take a few moments as it populates the database, so please be patient. Upon a successful connection, you will see the screen on the following page.

Once an initial login has been made for a specific user, that user may now access the training mode. The Server drop-down on the login screen will, by default, connect to `server.biotechthc.net`. A second option, however, is `trainingserver.biotechthc.net`. Connecting to the training server will allow a user to perform many functions and test out many of the system functions without affecting live data.

If your network requires a proxy, you may click on the Proxy checkbox to bring up the following screen:

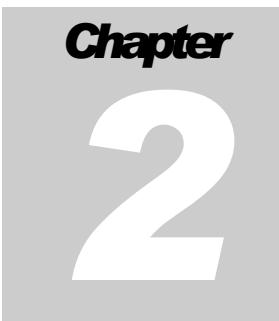


From here, you can enter the Host IP address, Port, Username and Password to the proxy. Additionally, if the proxy requires the use of SSL, you'll want to check off the Requires SSL checkbox. Once finished, click OK to save the Proxy settings. Once entered, you may now go ahead and login.



BioTrackTHC

Congratulations! The system has now been fully setup and you are ready to move to the next chapter which details configuring your new BioTrackTHC system.



Chapter 2: Configuration

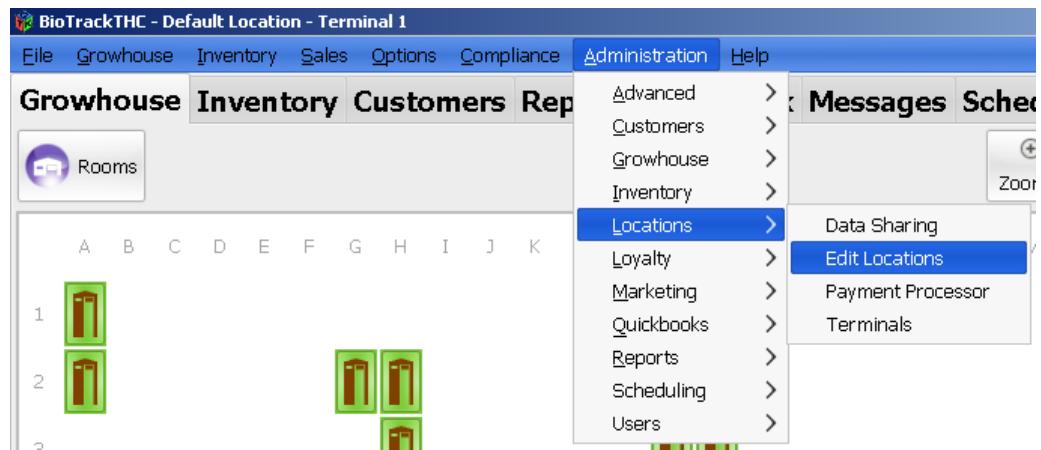
In this chapter, you'll learn how to:

- ✓ Configure the location mode
- ✓ Add new locations, update location details
- ✓ Add new users, configure permissions and update existing users
- ✓ Configure your finger scanner settings
- ✓ Configure your barcode scanner, receipt printer and label printer
- ✓ Configure your integrated scale
- ✓ ...and much, much more!

Location Modes

Now that you are connected to your BioTrackTHC system, it's time to configure it. First and foremost, you'll want to select the location mode you'll be using for the first location that has been created, by default.

BioTrackTHC allows you to create an unlimited number of locations that each have their own inventory, permissions, etc. Each location can be setup as either be a Growhouse, a Dispensary or a Combination. A Growhouse location will possess all of the tabs except for the Customers tab, as no customer sales are assumed from a Growhouse. A Dispensary location will not have the Growhouse tab, as no growing is assumed. A Combination location inherently possesses all tabs. This is the location type for the first location, by default and should be changed as, in practice; most centers will want to differentiate their inventories. To change the mode of our initial location, we're going to navigate to the Toolbar and click on Administration, Locations, Edit Locations, as seen below:



Which will bring up the following screen:

The screenshot shows the 'Locations' configuration dialog box. On the left, there is an 'Instructions' section containing text about creating new locations. On the right, there are several input fields for defining a location:

	Existing Locations	Default Location
Type	Combination	<input type="button" value="▼"/>
Name	Default Location	<input type="button" value="▼"/>
Address 1	1111 Address Way	<input type="button" value="▼"/>
Address 2	<input type="text"/>	<input type="button" value="▼"/>
City	Denver	<input type="button" value="▼"/>
State	CO	<input type="button" value="▼"/>
Zip	80203	<input type="button" value="▼"/>
Phone	333-444-5555	<input type="button" value="▼"/>
Fax	555-666-7777	<input type="button" value="▼"/>
Website	<input type="text"/>	<input type="button" value="▼"/>
License Number	1234	<input type="button" value="▼"/>

At the bottom of the dialog box, there are four buttons: 'New', 'Save', 'Delete', and 'Close'.

Updating a Location

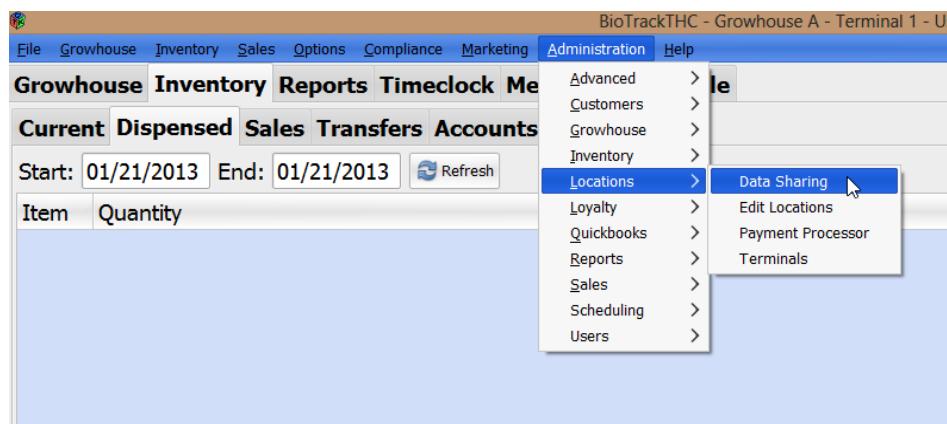
As you can see, the Default Location is, by default, set to a Combination type. To modify a location, simply click on the drop-down arrow next to the Existing Locations entry box. Once a location has been selected, you can then change the type, and other details including renaming the location to a name of your choosing, the address, city, state, zip, phone and fax, website and state license number, if applicable. The address, city, state, zip, phone and fax will all appear on any receipts that are tendered for the location (if it is a retail location). Also, for certain jurisdictions (e.g. Colorado), this data is also required for compliance features, detailed in a [later chapter](#).

Adding a New Location

Adding a new location is just as easy. Simply click the New button on the Locations screen. Once clicked, the fields will reset and you can start by entering a new name for the location. Next, select the type of location (e.g. Combination, Dispensary or Growhouse). These are the two minimum fields that must be entered for a new location, the rest can be entered later, if necessary. Once you are satisfied, simply click Save to save the new location.

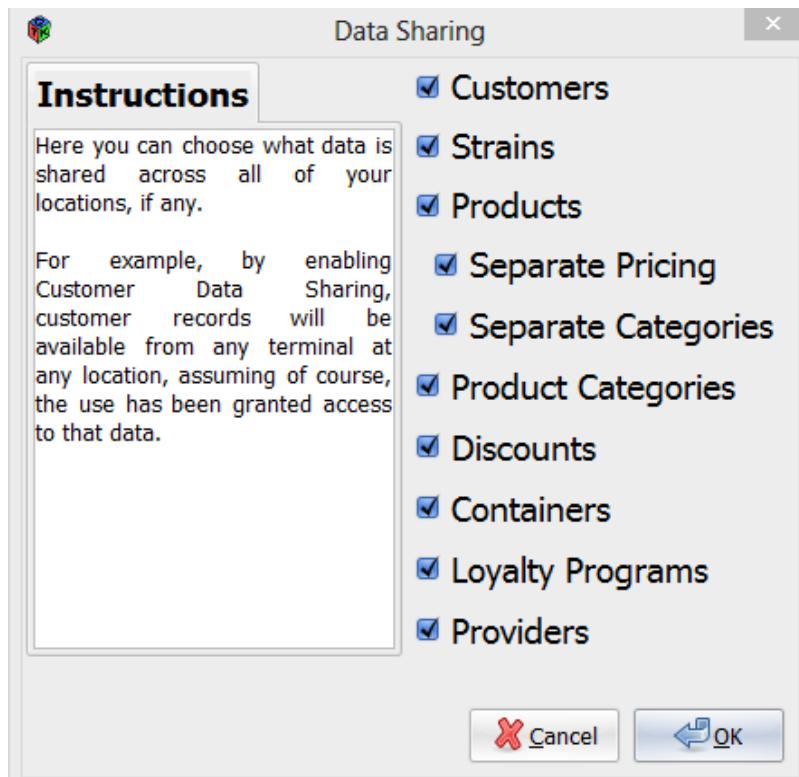
Deleting a Location

To delete a location, simply select it as you did previously from the Existing Locations drop-down. Next, click on the Delete button. The system will prompt for confirmation. Once confirmed, the location will be deleted. You may need to restart the program for the deletion to take effect.



Location Data Sharing

Locations are generally separate and distinct data sets. However, the system can be configured to share certain things across multiple locations for ease of use. You may access the Location Data Sharing by clicking on Administration, Locations, Data Sharing.



The Data Sharing screen allows you to check off which data sets, if any, are shared across locations, including: Customers, Strains, Products, with the potential for allowing each location to set their own pricing and categories for the shared products, Product Categories, Discounts, Containers and Loyalty Programs.

Customers will still be assigned to their own unique locations, but they will be searchable and usable across any and all locations, if enabled.

Strains will allow a Dispensary and Growhouse to keep their strain names the same, if enabled.

Products sharing can be exceptionally useful if there are multiple dispensaries connected to the system. Separate Pricing and Separate Categories will allow you to set separate pricing and product categories for the products, if you wish. Otherwise, the shared products will share the same pricing and categories.

Product category sharing is necessary if you will be sharing products; otherwise it allows various locations to share common category names.

Discounts allow multiple locations to share discount buttons, which are discussed later.

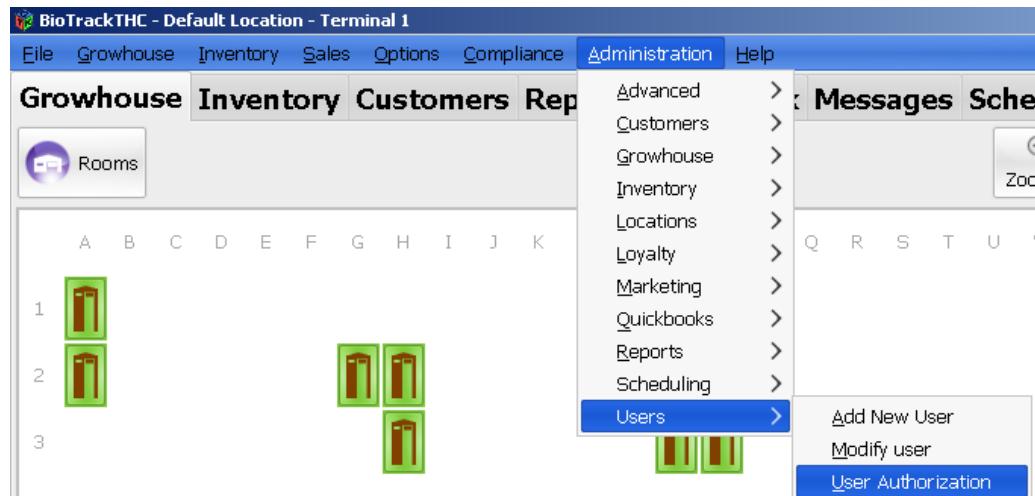
Containers are used in various parts of the program for ease of use and are also discussed later.

Loyalty programs can also be shared and are automatic discounts that are applied to customers who visit or purchase regularly, they, too, are discussed later.

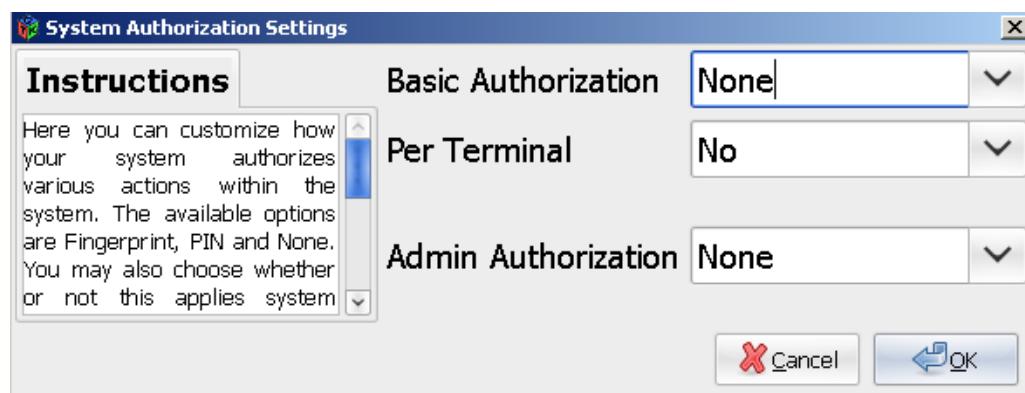
The general rule of thumb is to share as much as possible, and only to use separate product pricing and categories when you have locations with different pricing structures.

User Authorization

Users are authenticated, by default, using finger scanning (hence the Bio in BioTrackTHC). This can be configured, to require other methods, however. To get to this screen, navigate to the Toolbar and click on Administration, Users, User Authorization, as shown below:



That will then present the System Authorization Settings screen:



Basic authorization can be set to None, Fingerprint or PIN. By default it is set to Fingerprint. Basic authorization is the authorization that is prompted for during certain

operations, e.g. customer sale, inventory transfer, etc. Requiring a finger scan will ensure that, in cases where multiple users have access to a terminal once logged in, the sale or other important action will be logged under the user who actually performed the action, instead of simply knowing who was logged in at the time. PIN authentication can be used, instead, to prompt the user for a 4 digit (or greater) PIN for every major transaction, as another way to ensure accountability. Finally, None will allow a center to simply rely on the currently logged in user for storing accountability information. Though not the most secure, it is certainly the fastest.

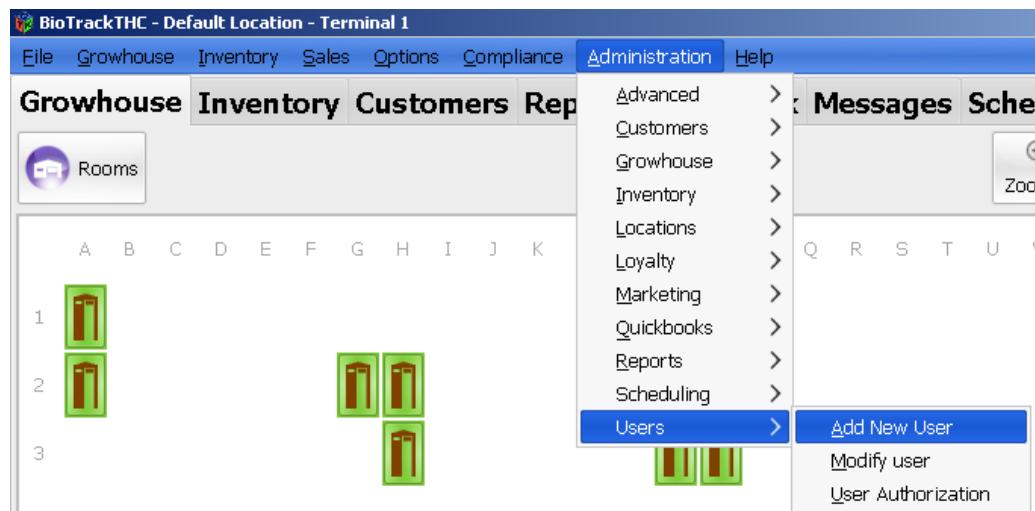
The Per Terminal setting will allow you to toggle these authentication settings, per terminal. After toggling this setting to Yes, there will be a new authentication option on the Terminals setup screen, discussed [later in the chapter](#). This will allow a center to require additional authentication for certain terminals (e.g. sales), but not for others (e.g. growhouse).

The Admin Authorization is in place as a way to bypass permissions when needed. For example, a user may not have permission to offer a discount above a certain amount and in trying to do so, the system will normally prompt for a finger scan from a user who does possess the permission. PIN can also be selected for this option, or, None, which will simply allow such a transaction to occur.

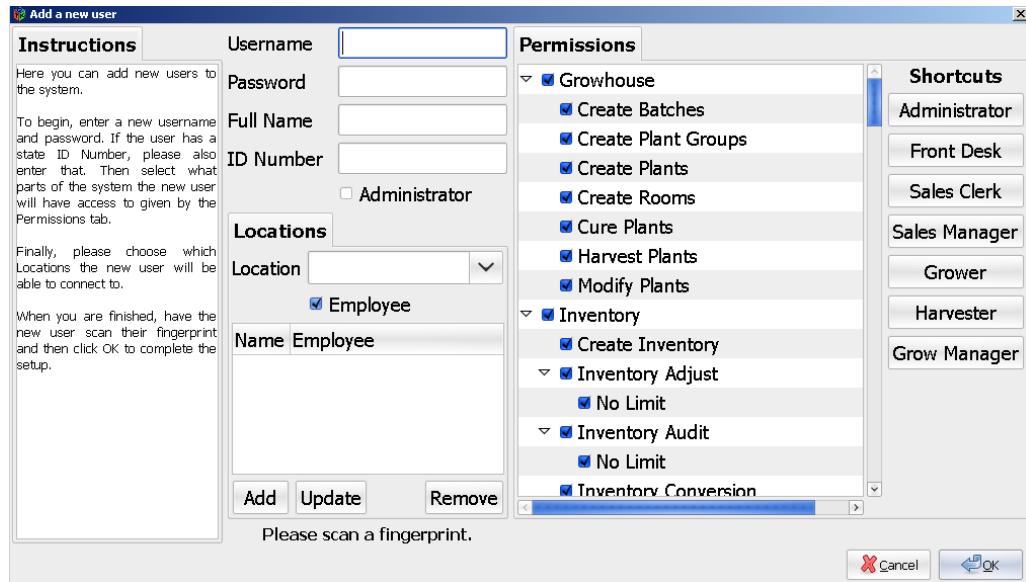
It is recommended to leave Admin Authorization to Fingerprint or to change it to PIN.

Adding a New User

New users can be added via the Toolbar by clicking on Administration, then clicking on the Users category, then clicking on Add New User.



That will bring up the following screen:



New User Screen

To begin, first select a proper username for the new user and enter it into the Username field. Next, enter a password into the Password field. For certain reports, you will also want to enter a real name for the user into the Full Name box. ID Number is optional and is used for certain jurisdictions (e.g. Colorado) where a user is assigned a state identification number. The Administrator checkbox allows a user to be defined with special permissions including adding new users, locations, etc.; in other words it should be granted with caution. To the right, there is a tab named Permissions. This tab allows you to configure precise controls over what actions a user may take, what they can view, and also what reports they may or may not run, per location. There are several shortcuts to the right of the permissions tab that may be used to quickly select common options for pre-defined roles.

To begin defining a set of permissions, first click on the Location drop-down to the left and select the location for which you would like to set the permissions. Then adjust for the appropriate settings to the right. Certain options that provide the ability for a limit (e.g. Inventory Adjust), will pop-up with a prompt for a limit in grams (e.g. 5). There are easily over a hundred options that control everything from which screens the user may access to which reports they may run.

The Employee checkbox is relevant for certain jurisdictions (e.g. Colorado), where employees must be reported. For other jurisdictions, it has no relevance. Once a set of permissions has been configured for a location, click on Add on the left hand side under the Locations tab to add the Location to the access list. If there are additional locations the user should be granted access to you may also select them from the Location drop-down.

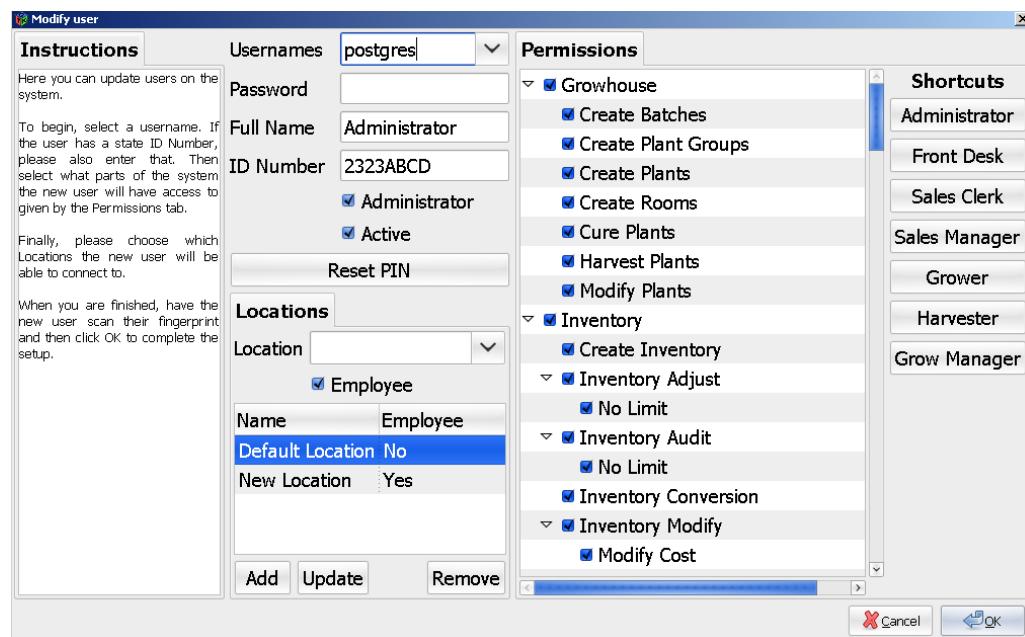
If a mistake was made on the permissions, you may highlight a location once it has been added to the location list, make any changes, then click Update. Once a location has been highlighted, you may also click Remove to remove it from the location access list.

If the system is set to fingerprint authentication, you will now need to scan the new user's finger. If the system's authentication has been set to either PIN or None, there will be one additional field named PIN. Even if the authentication has been set to None, a user is required to select a PIN in case the admin authentication has been set.

Finally, click OK to proceed to save the new user.

Modifying Existing Users

Existing users can be modified via the Toolbar by clicking on Administration, then clicking on the Users category, then clicking on Modify User. That will bring up the following screen:



Modify User Screen

To begin, first select a user from the Usernames drop-down menu. To reset the user's password, you will need to enter a new one into the Password field, otherwise leave it blank. If you need to remove a user, simply uncheck the box that says Active. The Administrator toggle will enable or disable the user's ability to access the Administrative functions.

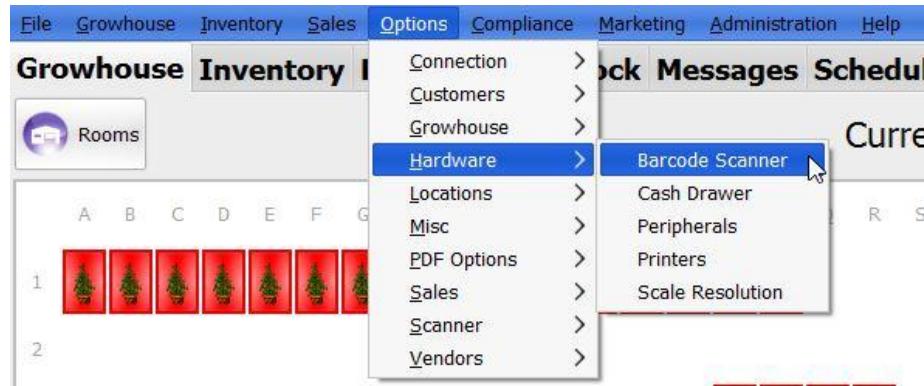
If you are using fingerprint authentication, there will be a button named Reset Fingerprint that will prompt the user for a new scan. Otherwise, the button will read as

Reset PIN (as shown above). Clicking on this will then allow the user to reset their PIN.

To the left and below is the locations access list. Clicking on a location will highlight that location's permissions (the Default Location is highlighted in the example above). To the right, you may now re-configure the user's permissions. Once the changes have been made, you must click on Update to temporarily save the changes. Locations may be added or removed in exactly the same manner as the Add User screen. To save the changes for a user, you must click OK. The system will then confirm that the changes were successful. If you are adding new features to the currently logged in user you must restart the program for the changes to take effect.

Barcode Scanner Configuration

The barcode scanner configuration can be found by navigating to the Toolbar and clicking on Options, Misc, Barcode Scanner, as seen below:



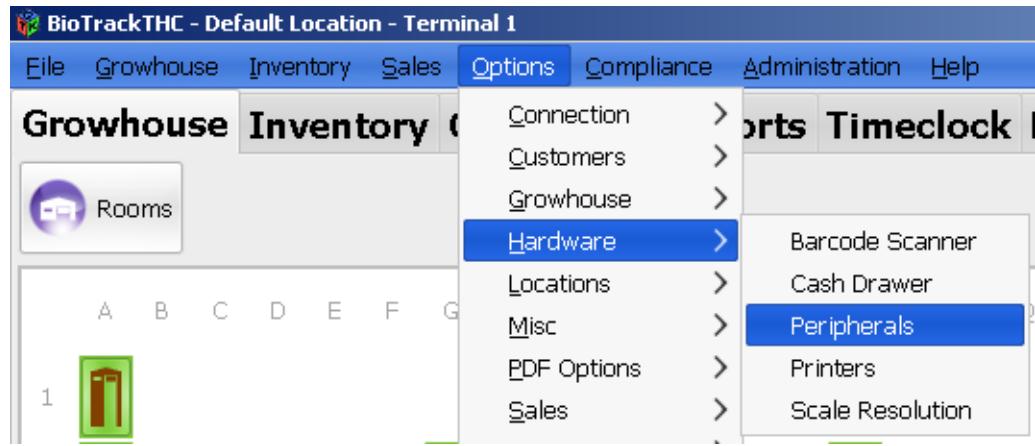
There is only one option available on the barcode configuration screen. The option named Return is designed to alert BioTrackTHC whether or not your barcode scanner sends a carriage return after every barcode scan. By default, most barcode scanners do send a return and as such, this option is on by default.



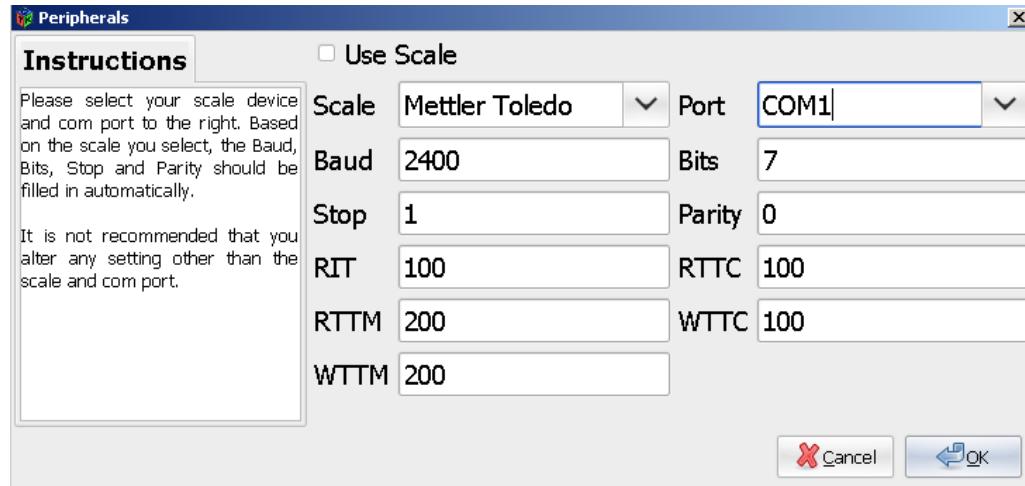
If you scan barcodes and notice that it only scans one barcode and then stops, but otherwise seems functional, you may want to toggle this option on or off and try again.

Integrated Scale Configuration

If you possess a scale that has either a USB connection (or a serial connection with a serial to USB converter), you may integrate it into BioTrackTHC to automatically pull scale readings in real-time. To begin with integration, first connect the USB to the computer. Once connected, click on Options, Hardware, Peripherals:



Which will present the following screen:



Checking or unchecking Use Scale will enable this feature. There is a shortcut on every screen that uses the scale to do this on-the-fly, as well. In any case, to begin first select from the drop-down the type of scale you are connecting. The system currently supports the following scales: A&D EK and FX series, Mettler Toledo JL/GL series, Ohaus Gold Series, Ohaus Scout Pro and the Ohaus Adventurer Pro. Next, you'll want to select the COM port the device is on. The drop-down should have a list of

active ports. If there is only one port in the drop-down list, this should be the one that you want. If there are multiple ports or, for whatever reason, no ports are shown, then you'll want to open the Windows Device Manager to determine the port number. To do so, go to the Windows Control Panel, and double click on System. Next, click on the Hardware tab and click on Device Manager. Once the Device Manager is open, you will be looking for the category named Ports, expand it to reveal something similar to the following:



You will be looking for a port that refers to either Serial to USB or similar. The port number will be on the right in parenthesis (e.g. COM1). Once this has been obtained, select or enter it on the Peripherals screen under Port. The baud, bits, stop and parity are set the normal default for the respective scale. However, your scale could be configured differently, in which case it will require physical access to the scale native interface. The fields RIT, RTTC, RTTM, WTTC and WTTM are low level timeout commands and should not be altered by anyone who does not understand COM settings. For such a person, the suggested range for these values is between 100 and 400.

Once configured, click OK to save your settings. You may then test to see if the settings were successful by clicking on the Containers button. You don't need to know how to use the screen just yet, but it will have a scale window at the top of the screen. You will notice the scale window by the buttons that read: Gram Mode, Ounce Mode, and Zero Scale. Another button will either be named Integrated Mode or Manual Mode. The scale mode can be toggled back and forth between the two modes by simply clicking the button. If the scale is working, the area at the top will show the current weight that is displaying physically on the scale. If you selected the wrong port, the area will most likely be red with the words "No Scale Detected". If the screen is completely white, this indicates the port was correct but the scale is not outputting any data.

Sometimes a scale will not respond to the automated data initiating routines (in other words, no configuration required). In such a case, you will need to physically configure your scale to output data. Here are links to the various scale manuals:

A&D EK series: http://www.andononline.com/uploads/documents/EKW-i_IM.pdf

A&D FX series: http://www.andononline.com/uploads/documents/FX-i_IM.pdf

Mettler Toledo JL/GL: [JL-G-L-BA-e-11781164.pdf](http://www.mt.com/resourcecenter/manuals/jlgl_e11781164.pdf)

Ohaus Gold Series: [D0B8BA33-A999-42FD-8775-3721B3F3E8C8.pdf](http://www.ohaus.com/resourcecenter/manuals/d0b8ba33-a999-42fd-8775-3721b3f3e8c8.pdf)

Ohaus Adventurer Pro: [80251161.pdf](#)

Ohaus Scout Pro: [71160417.pdf](#)

Once consulting the respective manual, you will want to follow the guide to enable constant serial output. Some scales will only allow interval output rather than constant (e.g. Gold Series); that will work just fine.

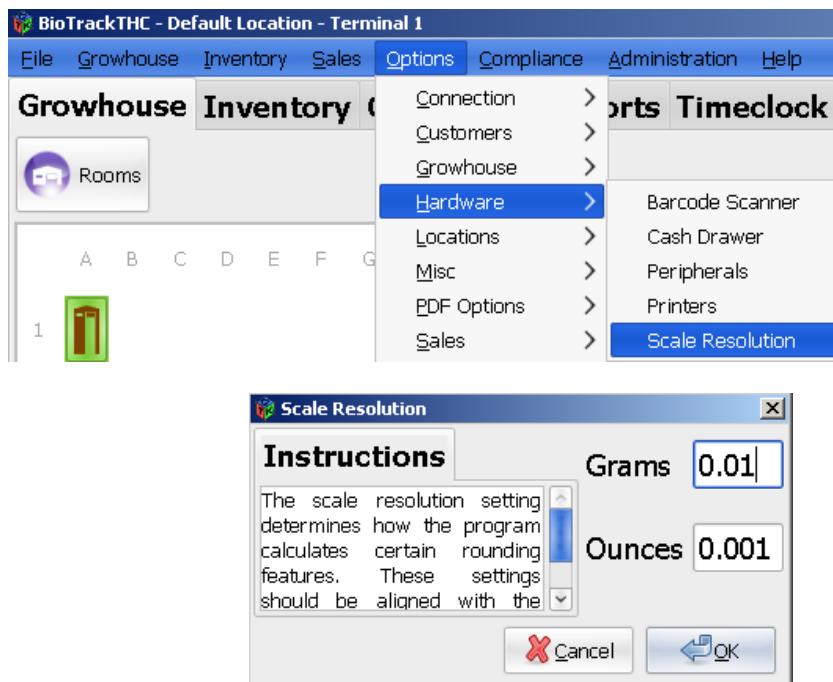
Additionally, you'll want to consult the manual to view the baud rate settings. They need to match the settings in the program. You can choose to either change the settings on the Peripherals page to match what is already set in the scale, or vice versa and set the scale's baud rate settings to match the BioTrackTHC default.

Once the settings match up, you will now see real-time data output to the New Inventory (and other screens that contain scale input).

Please keep in mind that an integrated scale is not necessary for the operation of BioTrackTHC. By default, the system is configured for manual mode and can be kept in this mode for all operations, if necessary.

Scale Resolution

By default, whether in manual weighing mode or integrated weighing mode, the system has a display resolution of 0.01 grams and 0.001 ounces. This can be increased or decreased by modifying the Scale Resolution by navigating to the Toolbar and clicking on Options, Hardware, Scale Resolution.

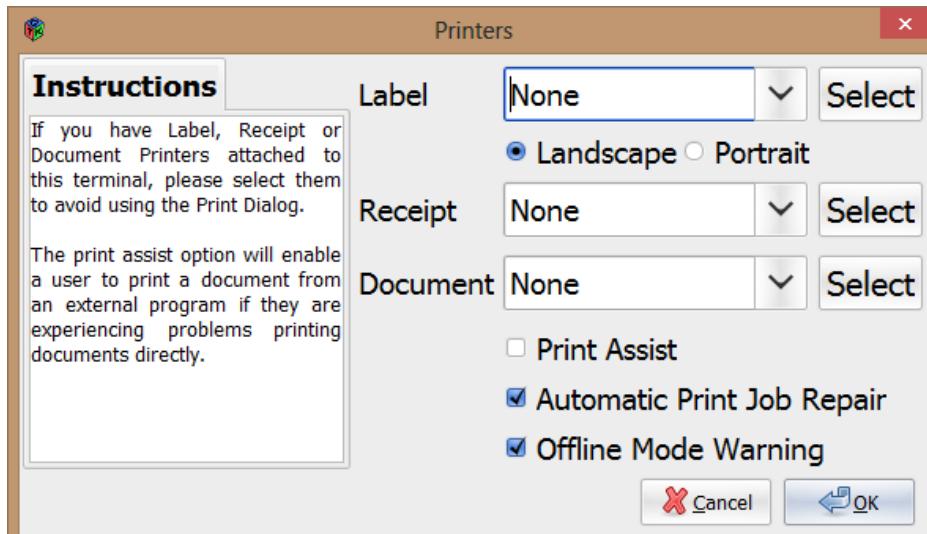


The number must end in a 1 and it is recommended to keep the defaults.

Configuring Printers

BioTrackTHC can be configured to print to various mediums, including label printers, receipt printers and document printers. To begin, click on Options, Hardware, Printers.

Once opened, you'll be presented with the Printers pop-up selection screen.

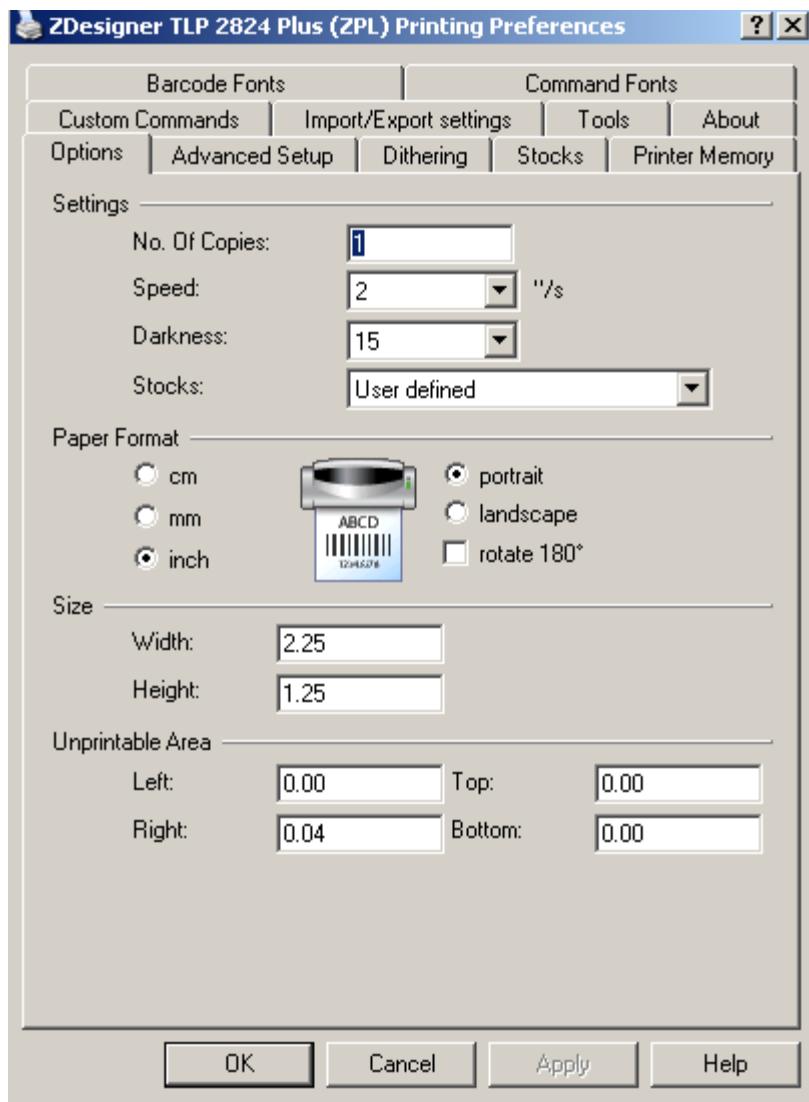


To begin, ensure that the drivers for the respective printers are installed. BioTrackTHC is configured by default for the Zebra TLP2824 Plus, but can be configured to any label printer. The latest Zebra drivers can be found at <http://www.zebra.com/us/en/support-downloads/desktop/tlp-2824.html>. Also, make sure the label printer is set as your default printer.

Label Printer

If you have the TLP 2824 Plus, or another printer (e.g. DYMO), you'll want to click on the Select button to the right of the Label drop-down. This will pop up a printer dialog where you will then be able to select the label printer; simply click Print to complete the selection. This will cause the printer to automatically send label prints to the printer without a dialog selection box. **If you own the LP 2824 or the TLP 2824 (Not the Plus model), do NOT select a printer. There is a firmware bug in these models that will cause it to feed an extra label every print if the dialog box does not popup.** However, if the label printer has been set as the default printer, only one additional step is required for a label print where the user simply clicks Print on the Windows Print Dialog.

If you haven't already done so, you will want to configure your label printer's label size. The following demonstrates what this screen will look like for Zebra printers:



This screen can be reached by navigating to the Windows Start Menu, then click on either Printers and Faxes or Control Panel. If you click on the Control Panel first, then look for Printers and Faxes. Once you are viewing all of your Printers, you'll then want to right click on the label printer and click on Printing Preferences. The normal label size for Zebra printers is 2.25 width by 1.25 height. Next, you'll want to click on Advanced Setup and ensure your printer is performing Thermal Transfer if you printer has a ribbon and Thermal Direct if it does not. Finally, you'll want to click on the Tools tab and then click Send which will calibrate the media with the correct label size.

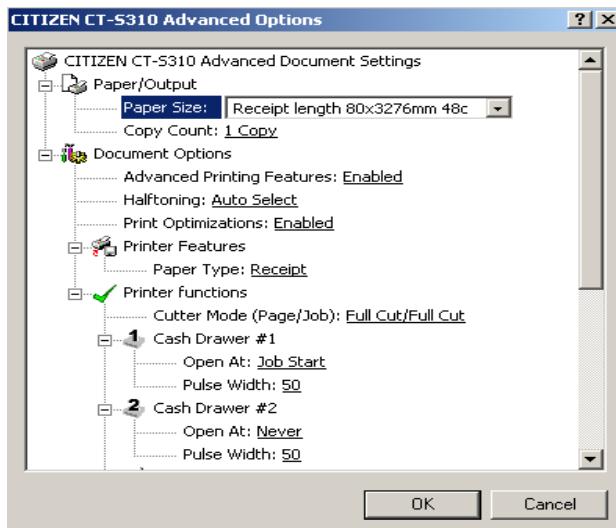
If you own a non-Zebra printer and are experiencing issues with their drivers, you will need to consult your vendor for help in setting up those settings.

The final setting available for the label printer is forcing either Landscape or Portrait mode. Leaving it at Landscape mode will most likely be what you want; but if the label is printing sideways, switching this option may just fix the problem.

Receipt Printer

The receipt printer that is recommended for BioTrackTHC system is the Citizen CT-S310, however BioTrackTHC will work with virtually any printer. The receipt printers do not generally require any additional setup beyond the installation of the drivers; the Citizen drivers can be found here if you do not already have them: [CT-S310 Software Setup.exe](#). If you have a receipt printer other than Citizen, you will need to consult your receipt printer vendor's website for those drivers.

The one thing you may wish to configure is the automatic cash drawer pop with the printer. The following instructions are for the Citizen CT-S310, but they should be similar with other printers. To begin, navigate to the Windows Start Menu, then click on either Printers and Faxes or Control Panel. If you click on the Control Panel first, then look for Printers and Faxes. Once you are viewing all of your Printers, you'll then want to right click on the label printer and click on Printing Preferences. Then, click on the Advanced button which will bring up the followings screen:



Near the bottom, you'll notice the items Cash Drawer #1 and Cash Drawer #2. Make sure that Cash Drawer #1 is set to Job Start. You may also set the Job Start on Cash Drawer #2 if #1 is not working.

If this does not work, or your receipt printer doesn't support a shortcut method for popping the cash drawer, you can manually configure a pop code for it [later in the chapter](#).

Document Printer

The system can, of course, be used to print out scanned documents once they are in the system. If you wish to streamline the process of selecting the document printer when printing such documents, you may do so at this time. There is an additional option named Print Assist for the document printer. In rare cases, a printer could experience an issue printing directly from BioTrackTHC. In such a case, checking the

Print Assist checkbox will automatically export such a document and launch the native windows program for printing.

Printer Reset

Occasionally, you may experience difficulty printing. When attempting to print, a printer may seem unresponsive no matter how many times the Print command is selected.

A common cause for this situation is that the print queue for a particular printer has too many printing tasks and has locked up, thus causing the printer to become unresponsive.

To get the printer responding quickly again, simply go to the Help menu and select Printer Reset.



This will send a command to the printer to clear out the queue so that printer may operate again. Once this is done, you should be able to print as usual again.

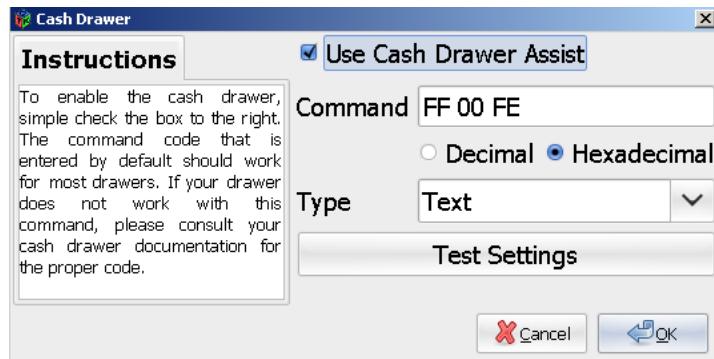
Cash Drawer

Configuring your cash drawer may not be necessary as many printers possess the capability to pop the drawer natively, as was described in the receipt printer configuration. If your printer does not have this ability, it can be configured manually now by navigating to the Toolbar and clicking on Options, Hardware, Cash Drawer:



This will open the Cash Drawer manual configuration screen. You will need to locate your receipt printer manual for the pop code. Some machines will typically use a simple code like 06 or 07. If you cannot locate your manual, a very useful website that indexes many common printers is at: <http://keyhut.com/popopen.htm>. For example, it lists the Citizen CT-S310 as using the following code: 27 112 0 50 250. You'll notice on the

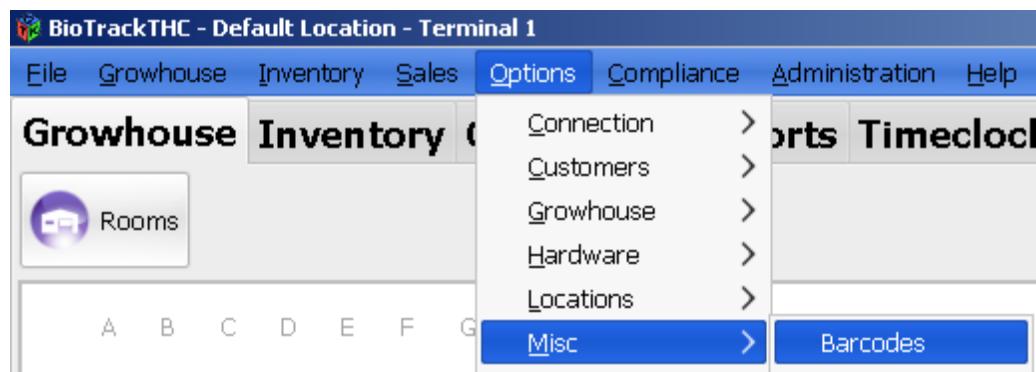
following screenshot that you will also have the option of selecting Decimal or Hexadecimal. In the CT-S310 code, because it consists only of numbers, we will need to click on the Decimal option. If the code had been given in a different format, e.g. 1B 70 00 32 FA, then we would have selected the Hexadecimal option (which, along with numbers 0-9, also includes the letters A-F). Next, the type can either be Text or Raw, and this refers to the transmission method the printer prefers. It is recommended, at this point, to simply try clicking on Test Settings with the Text type. If that fails to pop the cash drawer, simply click on Raw and try again.



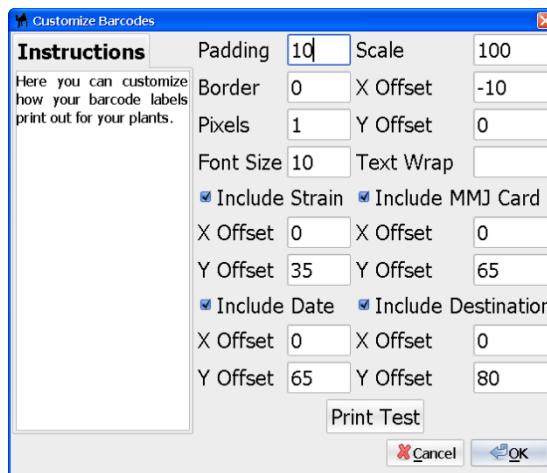
Once Test Settings pops the drawer successfully, make sure that Use Cash Drawer Assist has been checked for automatic pop upon a sale. If your printer supports the previously described process of configuration through the printer drivers directly, you will probably not want to check the Use Cash Drawer Assist box. That would, essentially, send two pop commands to the drawer. While harmless, it is unnecessary. Locating your manual pop command and entering it here may still be desired even if your printer configuration handles it automatically because you will gain the ability to pop the cash drawer through the system at will, which is actually described in a later chapter.

Barcode Customization

Barcodes are used in the system for tracking plants, inventory and also to tag products. To begin customizing your barcodes, navigate to the Toolbar by clicking on Options, Misc, Barcodes:



Which will bring up the following screen:



Please note that on a Dispensary Location, the checkbox that reads “Include MMJ Card” would instead read ‘Include Price’.

The padding, scale, border and pixels should **ALWAYS** remain at their default settings. The default offsets have been setup for the Zebra label printers, but can easily be configured for different label printers.

The first X and Y offsets control where the barcode prints on the label. The smaller the X offset, the more the barcode will move to the left. Offsets can be negative as most printers will include a margin space to the left; creating a negative offset can correct for this. The Y offset controls how far up or down on the page the barcode will appear. The smaller the number, the closer to the top it will appear. This offset can be negative, as well. Moving offsets too far negative can move the barcode off of the printable page, so please be aware of this when setting up the offsets.

The font size determines the size of any and all text that appears on the label, anywhere from size 6-10 is recommended.

The Text Wrap field is optional, but can be set to a specified number of characters to begin a wrap around for the name of a strain or product on a barcode. This can be useful if you have extremely long strain names.

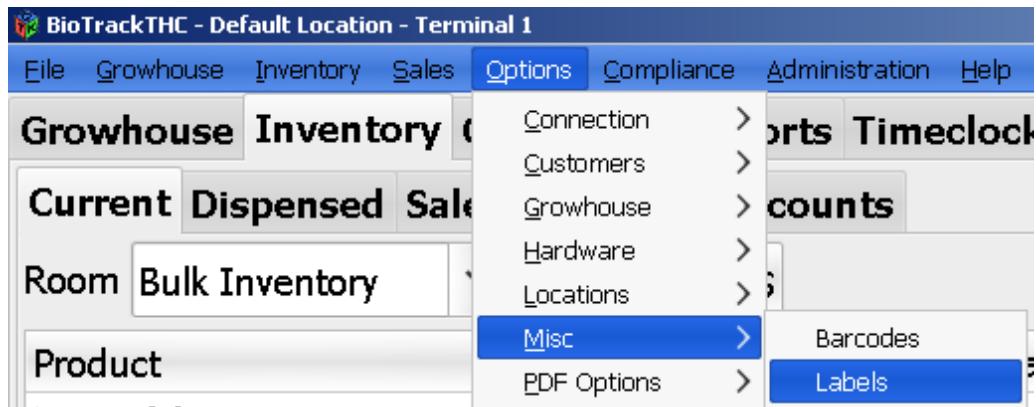
Checkboxes can then be enabled or disabled for including the Strain, Date, MMJ Card (or Price) and Destination. The X and Y offsets for each item can also be configured individually with the same rules previously discussed.

If the default settings do not work for you, the key is to try a new offset, click Print Test and then compare and contrast the new settings. You may need to go through a few labels to find the setting that is just right, but once you have the correct offsets you can use them on any other computers with the same label printer.

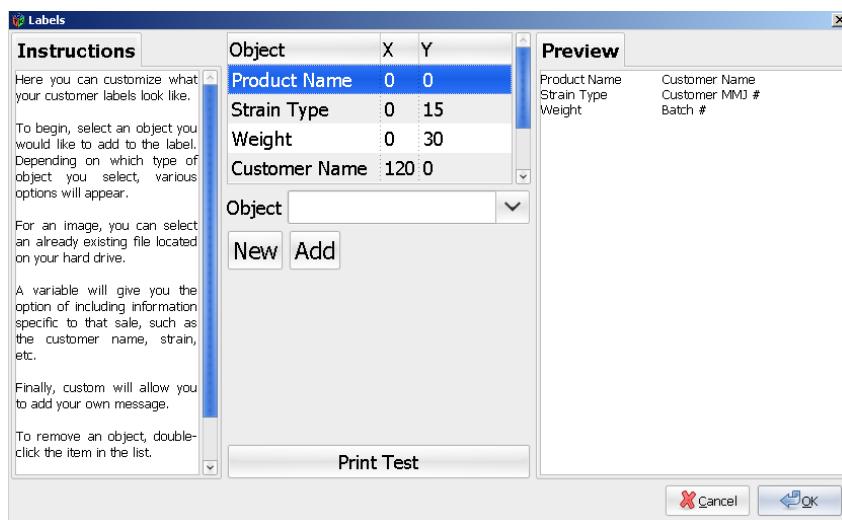
Once you have found the right settings, click OK to save your settings.

Customer Label Customization

To customize your customer labels, navigate to the Toolbar, then click on Options, Misc, Labels:



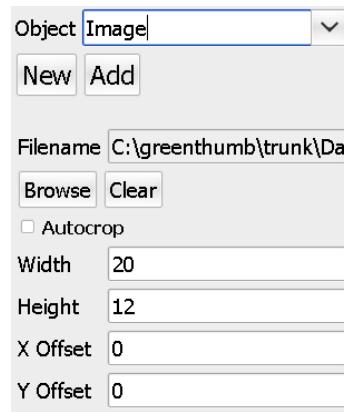
The following screen will then appear:



The defaults are not optimized for any label printer in particular as it's recommended that a center customize their customer labels with their logo, etc.

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

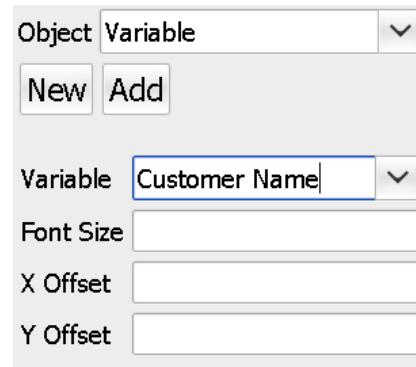
The image type, when clicked, will look like the following:



To add a new image, first click on the Browse button. This will popup a window asking you to select the image you'd like to add. Once selected, the system will automatically pull the width and the height. In most cases, it's a good idea to check off Autocrop to maximize the actual image that shows on the label. The width and the height that appear may be too big if the original image is extremely large. You can compensate by changing the values that appear. It is recommended that you lower them proportionally; for example, if your original image has a width of 800 and an original height of 600, you might consider minimizing each by a factor of 10 so that it appears as 80 by 60. The X and Y offsets control where the image will appear on the label, with a 0 X offset adjusting all the way to the left and a 0 Y offset adjusting all the way to the top. Once you have selected an image and are ready to add it, simply click the Add button and it will appear on the Preview area to the right.

Once an item has been added to the Object list, you may edit it by double clicking on it. This will automatically remove it from the Object list and enter the previously saved parameters. Thus, to delete an item, all you'll need to do is double click on it and then click New.

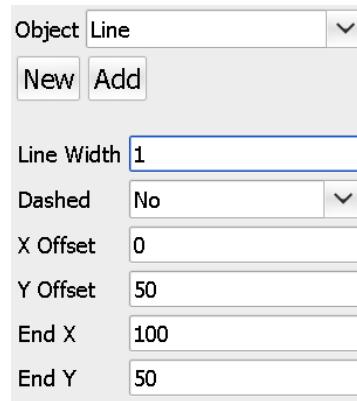
The next Object type is named Variable. As the name implies, this sets up the label such that this field will be different for every customer.



The Variables that you can choose from include: Customer Name, Product Name, Strain Type (Indica/Sativa), Weight (or Quantity), Customer MMJ #, Batch #, Date

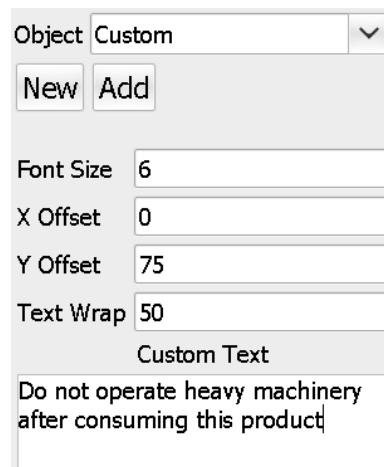
and License # (Where applicable). The font size should be at least 6 to be legible, but can be bigger if you wish. The X and Y offsets will determine how far from the left and top, respectively, the variables appears on the label. Once the placement and font size have been selected, click Add to add 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 change it as necessary.

Lines can also be added to your label, as well. They can be horizontal, vertical or even slanted. Here is a screenshot of what the line customization looks like:



The above settings will create a line that starts from the very left hand side (X at 0) and moves 100 units to the right (End X at 100), it also starts at 50 units down (Y at 50) and ends at 50 units down (End Y at 50); in other words, a straight horizontal line. The line width can be increased by any whole number value. The line can also be created dashed by changing the No to a Yes in the Dashed drop-down. Once again, trial and error works best for determining where you want your line(s) on the label and how they actually look.

The final object that can be added is called Custom. As the name implies, it allows you to enter Custom text that is the same on every label:

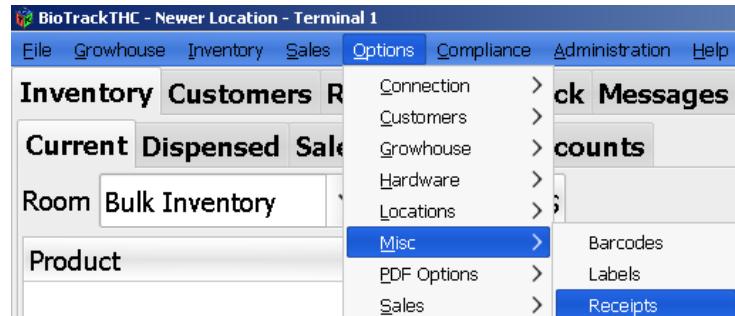


The font size determines the size of the characters that are placed on the label. A minimum of size 6 is recommended. The X and Y offsets determine where the text begins. It will then span from there to the right and down as your settings dictate. The Text Wrap option determines how many characters maximum per line. In the example above, after 50 characters the text would then continue on the next line below. Next, enter your custom message in the Custom Text field. Once you are satisfied, click Add and view it on the Preview label to the right.

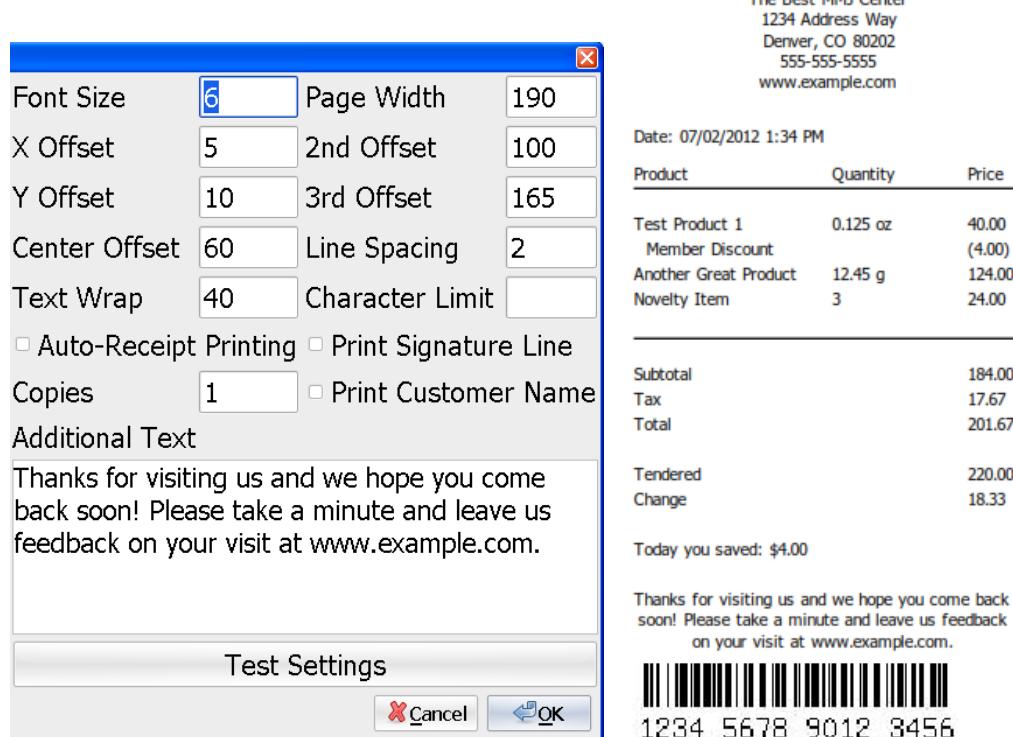
Once you think you have got a good looking label, click on Print Test to see it on your physical labels. With some printers, you may find they leave an excessive amount of margin space to the left. If you find this to be the case, simply double click through your items in the Object list, move each of their X offsets to a lower number (negative, perhaps?) and then click Print Test. With a little trial and error, you will eventually get to the perfect looking label!

Receipt Customization

The default settings for the receipt printer are setup for the Citizen CT-S310 printer. These default settings will actually also work for most other receipt printers, too. However, if you find these settings do not work for your printer, or you wish to add a custom message, you'll want to pull up the receipt customization screen. To do so, navigate to the Toolbar and then click on Options, Misc, Receipts, as shown in the following screenshot:



This will then bring up the Receipt Customization screen:



The font size determines how big the text appears on the receipt. A minimum of size 6 font is recommended for legibility. A receipt is essentially divided into four segments. A left offset, a second left offset, a third left offset, and a center offset.

The first X offset (denoted by X Offset) is where the left most text of the receipt appears, such as the Product Names.

The second left offset (denoted by 2nd Offset) is where the Quantity field is placed.

The third left offset (denoted by 3rd Offset) is where the Price field appears.

The center offset determines where the center information at the top appears.

The Page width helps the system determine where the barcode should be placed in relation to the entire page. For the most part, you should not need to adjust this field.

The Line spacing determines how much space is in-between each item's data. A minimum of 2 is recommended.

The Additional Text field allows you to enter a custom message that will appear at the bottom of the receipt.

The Text Wrap determines how many characters in the Additional Text field should be in each line before the text wraps to the next line. If your Page Width is 190, for example, a number of 40 is recommended for this field.

The Character Limit field is optional and allows you to limit the number of characters that appear for a given product name (if, for example, you have extremely long product names).

The Print Signature checkbox will cause the printed receipt to print a signature line for the customer to sign on.

The Print Customer Name will print the customer's name on the receipt, if enabled.

The final checkbox, Auto-Receipt Printing, is an option that allows your system to automatically print a receipt every time a customer sale is made. If this option is unchecked, a box will instead appear after a sale allowing a salesperson to print a receipt, if the customer so chooses.

The Copies entry box is only relevant when Auto-Receipt Printing is enabled and will automatically print the number of copies entered.

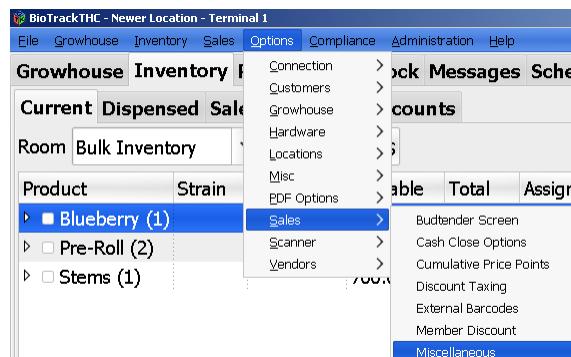
When you believe you have adjusted the receipt settings accordingly, click Test Settings to see what they will actually look like when physically printed. This peripheral will not require as much trial and error as the label printers as most receipt printers are fairly similar in page size and offsets. Once you have entered the correct settings, click OK to save them.

Miscellaneous Configuration

There are a few more miscellaneous configuration options you'll want to look into before proceeding and they are detailed below.

Setting Your Physical Location

You can adjust your Country and State (or Province) in BioTrackTHC to customize a few minor features within the system. They are mostly relevant to the sales subsystem, but it does affect a few other minor options, as well, so we will cover how to change this now. To begin, navigate to the Toolbar and click on Options, Sales, Miscellaneous:



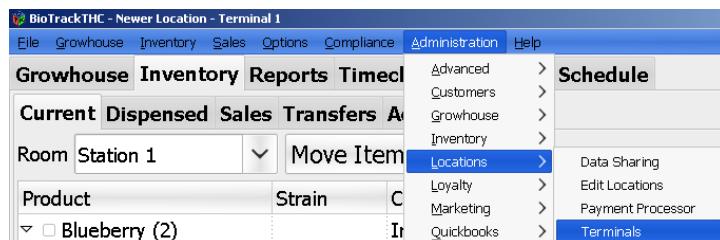
This will bring up the following configuration page:



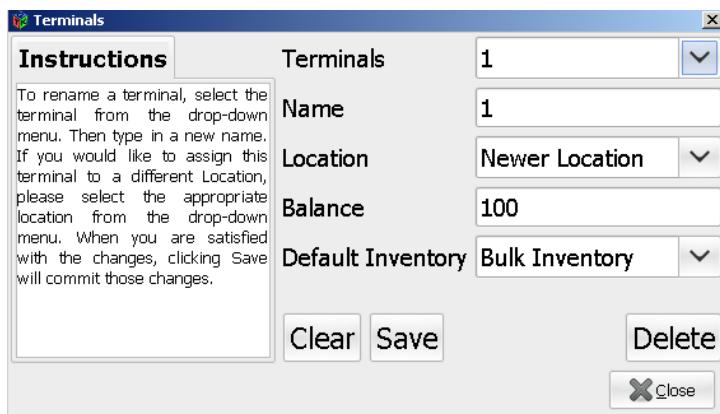
The other options will be discussed in Chapter 5. For now, you'll want to select your Country and State from the drop-downs seen above. Once you have selected the correct locality, click OK to save the changes. To see the changes you will need to reload the program.

Setting up a Terminal's Location

You may have noticed in our screenshots, and perhaps on your own screen, the very top of the screen will list your current location and your Terminal. By default, every new terminal that connects to the system is assigned a new number. You can associate an actual name with each terminal to make it easier to recognize which terminal is which. In addition, you can also choose the default location a terminal logs into. To begin, navigate to the Toolbar and click on Administration, Locations, Terminals:



This will display the Terminals screen:



In the screen above, we have already clicked into the Terminals drop-down and selected Terminal number 1. Once selected, we can assign a name (instead of just a number) to it, such as POS1, for example. The Location drop-down can be used to decide which location, by default, anyone using that terminal logs in to. So, 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 here. Otherwise, once they login, they'll need to switch locations every time and can sometimes lead to confusion. The Balance field will be relevant and explained more in detail in [Chapter 5](#) as it relates to the default amount of cash on hand this terminal should normally possess. For non-cash bearing terminals, this field will be set to 0. The Default Inventory is explained more in [Chapter 4](#) and it allows you to associate a default Inventory Room with a terminal.

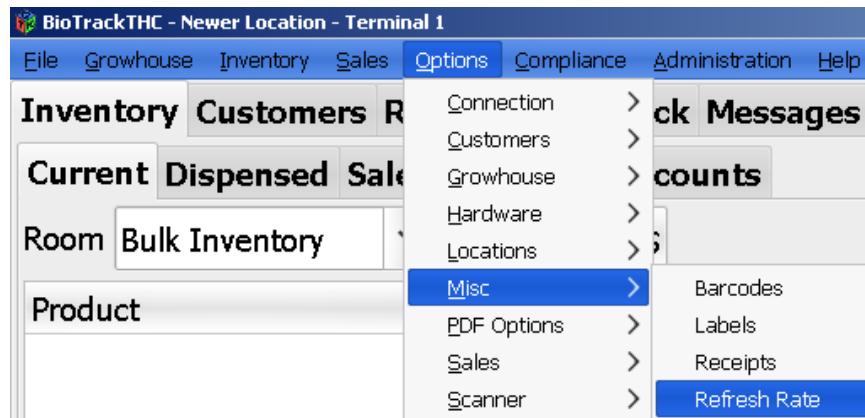
If you have set User Authorization Per Terminal to Yes, you will see one additional drop-down on this screen called Authorization. It will have the standard choices of: Fingerprint, PIN and None. This allows you to decide, for a specific terminal, what authentication method, if any, users on this terminal should be required to use. Again, that drop-down will only appear if you have set User Authorization Per Terminal on, otherwise, you will not see it and it will not be relevant for you.

Once you have made any changes to a Terminal, simply click Save to complete those changes. Please note that any changes to a terminal will not be visible until that terminal logs off and logs back on.

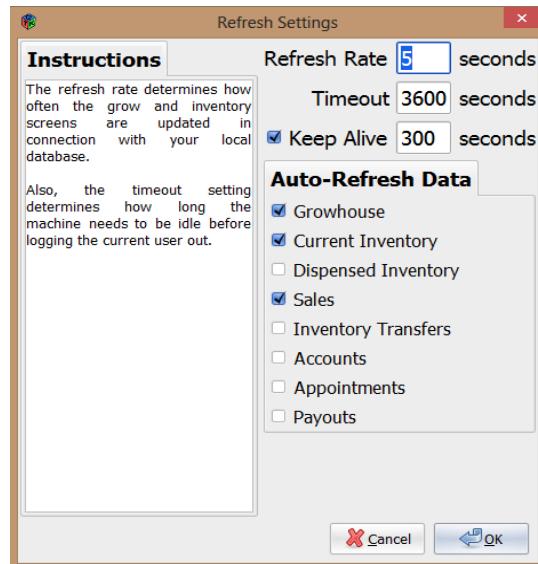
If a terminal no longer exists, you can also select it from the Terminals drop-down and simply click the Delete button, removing the terminal from the system.

Refresh Rate

Many of the data sets are set to refresh in the background at a set rate. These settings can be configured by navigating to the Toolbar and clicking on Options, Misc, Refresh Rate.



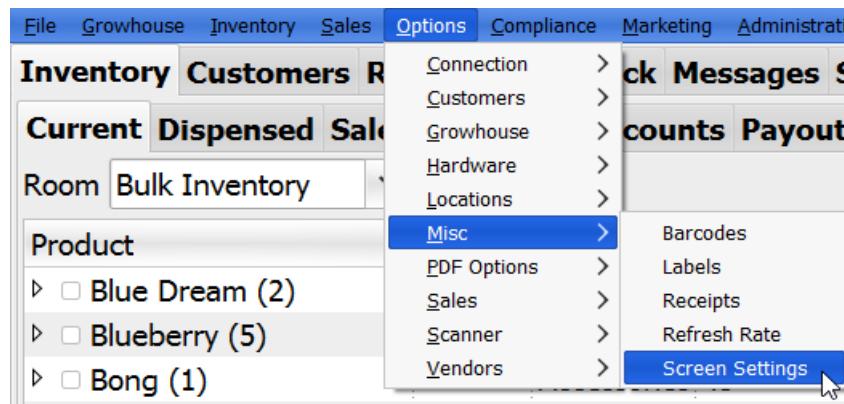
Which will bring up the following screen:



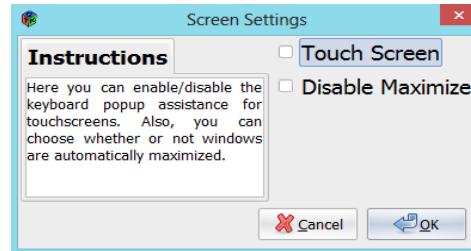
The Refresh Rate controls how often the system connects to the database in the background and refreshes various data sets, including plant data (on the Growhouse), inventory data and customer check-in data (on the Dispensary), among other things. The Timeout determines how long the system should automatically logout after inactivity at the terminal. The Keep Alive function is useful for remote connections or network connections that tend to be aggressive in killing idle connections. It's recommended for general purpose to leave the defaults selected for all of these options.

Touch Screen

Many of the sales screens are built-in with touch screen ease and capabilities. For the login screen, however, the system can enable the ability to use an on-screen keyboard. This can be enabled one of two ways. The first is to navigate to the Toolbar and click on



You can then enable or disable this feature by checking or unchecking the Enabled box, then clicking OK to save the choice.



The other way to enable or disable this feature is from the login screen, the following screen shot will demonstrate that it can be easily enabled or disabled by clicking (or touching) the keyboard icon on the bottom left hand side of your login screen.



After the on-screen keyboard is enabled, it will no longer appear as a button (it will now be a flat keyboard icon) and you will now notice that clicking (or touching the screen) on an entry box pulls up the following:



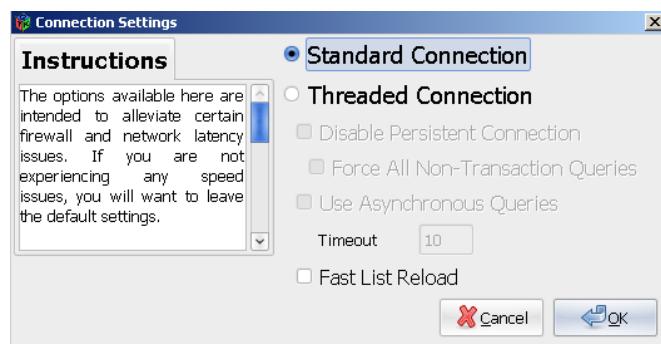
The feature can then easily be turned off by clicking the keyboard icon once again. It will then appear as a button once more as an indicator that it is not turned on.

Connection Settings

There are low-level settings that can be configured with your database connection. The defaults should work for most centers, but are described here if you are experiencing connection issues. To begin, navigate to the Toolbar and click on Options, Connection, Settings:



This will bring up the Connection Settings screen:



The main option here is the choice between a Standard Connection and a Threaded Connection. Some centers may have high latency connections and the Standard Connection, which is the default, may seem to cause the BioTrackTHC interface to produce a Windows not responding signal. If this is a common occurrence, you can try switching to a Threaded Connection which will process database queries in a separate

thread and ensure the system never appears locked up. There are additional options in relation to the Threaded Connection, such as Disabling a Persistent Connection with the option to Force a reconnect for All Non-Transaction Queries and the option to use Asynchronous Queries. If you are experimenting with a Threaded Connection, it is highly recommended you do not enable any of the additional sub-options. These are available mostly for diagnostic purposes and will slow down your connection if enabled on an otherwise working connection.

The Fast List Reload is an option that, if enabled, will cause certain data sets (e.g. Products), to load the entire dataset on the first connection to the system, but on subsequent additions or changes to the data set, the system will only reload the text data and bypass reloading of images. This can be extremely useful in an environment where many Products have images associated with them. For example, when a user adds a new product to the system, it reloads the entire data set in case any other users have also added products, to ensure data consistency. However, once a system has been entirely setup, it is fairly unnecessary to reload the images every time. Enabling Fast List Reload will speed that process up by only selecting text data. If you log out of the system, or switch locations, the entire data set (with images), will be reloaded, so this is not a permanent action but, rather, is designed to speed up the process of adding many new products at once. When in doubt, try enabling it and see if produces a noticeable speed increase.

The connection settings can also be accessed from the login screen by clicking on the small satellite icon in the bottom left hand corner of the login screen. It has been highlighted in red on the following screenshot.



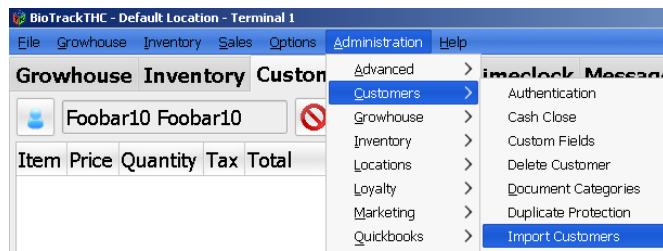
Clicking on this icon will bring up the same exact Connection Settings screen previously seen. Once you have finished updating your Connection Settings, click OK to save the settings.

There are many more configuration options to the system; but the ones covered in this section should be enough to get you started. You will find the additional configuration

options detailed in their respective sections (e.g. Inventory options in the chapter on Inventory) as they will make much more sense in context.

Importing Customers

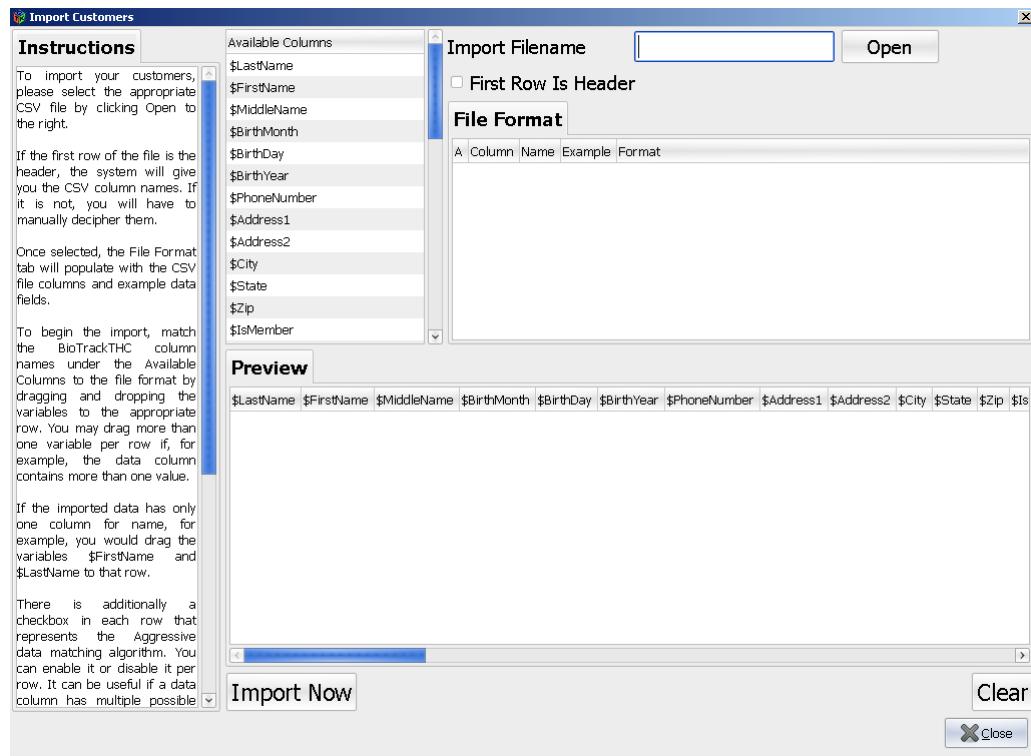
If you were previously using another electronic point of sale system and would like to import your previous customers, you may do so through the Import Customers screen. Navigate to the Toolbar and click on Administration, Customers, Import Customers:



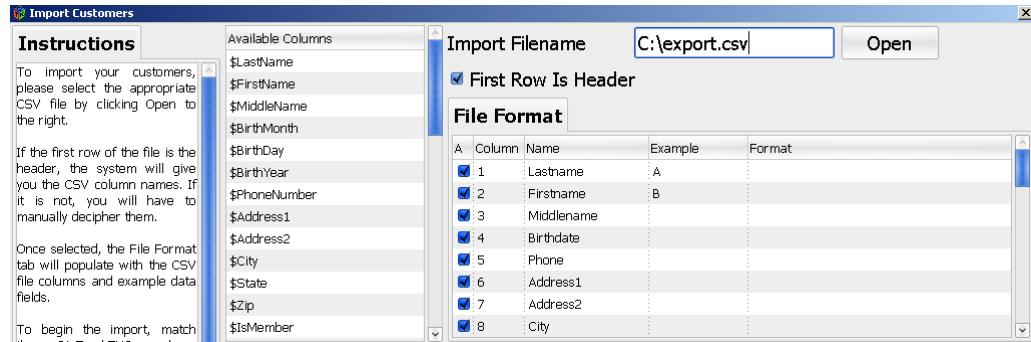
To use the Customer Import you will need to first export your current data in either a comma separated values format (csv) or a tab delimited format (txt). Tab delimited is the recommended export method if you have a choice in the matter.

Once you have exported the data, make sure it is located on the computer you will be performing the import on.

The import screen will look similar to the following:



To begin, click on the Open button. This will open the file dialog and allow you to locate the file on your computer. Once you have opened it, the screen will now appear similar to this:

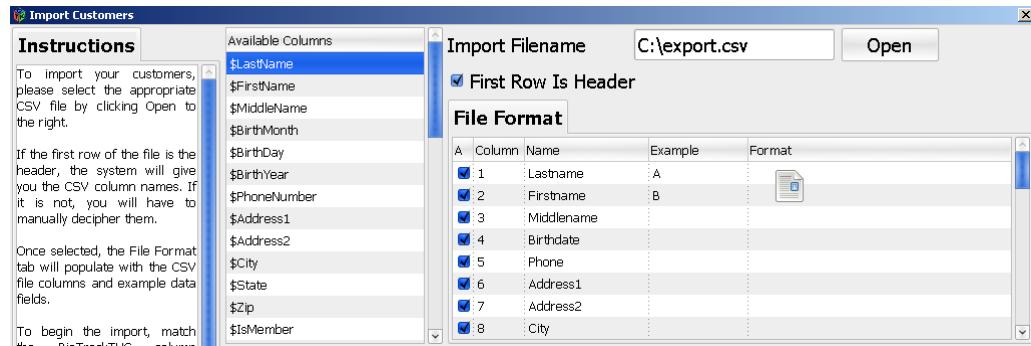


The system will attempt to detect whether or not the first row is a header. It will check the box if it thinks that it is. If it incorrectly detects this, you can check or uncheck the box as necessary.

You'll notice in the File Format tab five columns: A, Column, Name, Example and Format. The A column stands for approximate and its use will be explained shortly. The Column will tell you which column number, starting at 1, each field represents. The Name will represent the name of the field if the file has a header row, otherwise it will simply represent an example of the data contained therein. The Example will represent the first row of actual data if the file has a header, otherwise it will simply

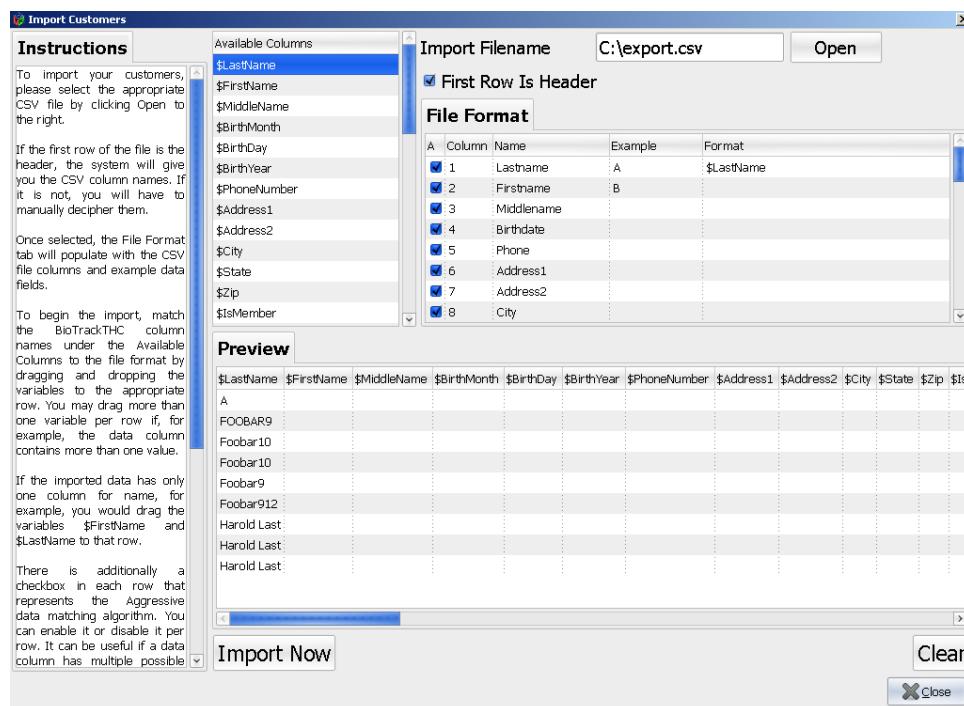
represent the second row of sample data. The Format column is where we are going to define for the system how each field relates to the BioTrackTHC available fields.

This is where the Available Columns, as seen in the previous screenshot, come into play. This list will contain all of the fields that you can import into BioTrackTHC.



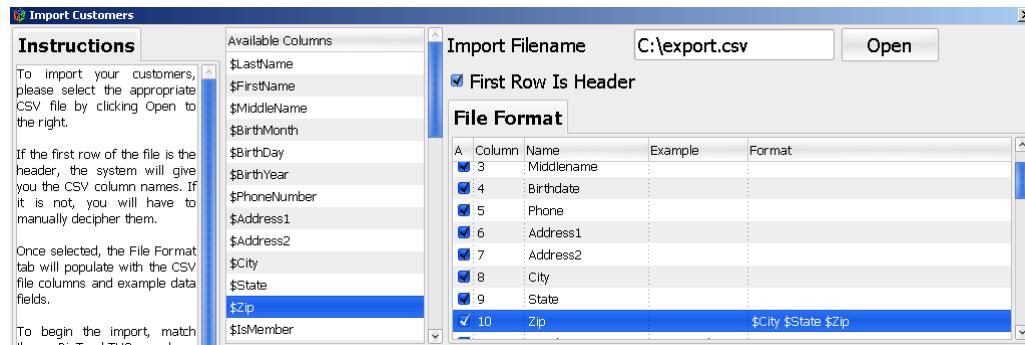
To begin an import, let's start with an easy field. We begin by clicking on the \$LastName row and then dragging and dropping it into the Format column in the first row, as seen above.

This will then populate the screen as seen here:



You'll also notice that the Preview tab is now (partially) populated. As you select fields to import, it will give you a preview of ten rows and how that data will actually import into BioTrackTHC. Because we have only selected the LastName column, that is all that currently shows up in the Preview.

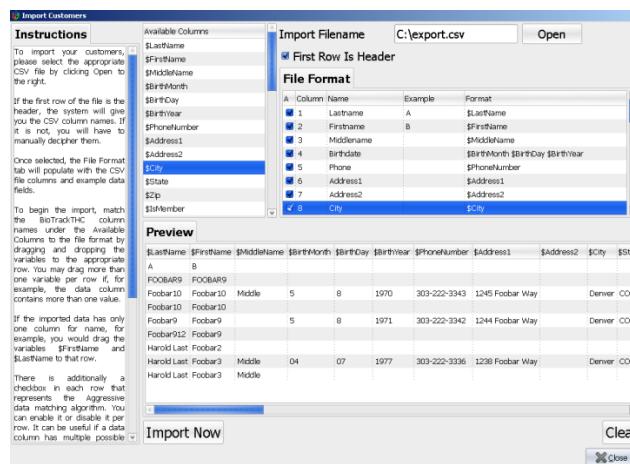
If one of your fields has multiple BioTrackTHC columns in it, you can drag and drop multiple BioTrackTHC columns onto one field. For example, let's say that one of your fields is called Zip, but in reality, it contains the City, State and Zip:



We have dragged \$City, \$State and \$Zip as a result. This is also where the A checkbox comes into play. If your field has similar, but not exact data, you'll want to make sure the checkbox is enabled. For example, let's say that one customer has the field "City, ST 00000" but another has "City ST 00000" without the comma, leaving the A checked will catch both flawlessly. In other words, it helps in situations where your data might not be as controlled as it should be.

If there are fields that your data contains but that we don't currently track, you can use the \$CustomField0 through \$CustomField9 fields to store that data in the system. The use of custom fields will be explained later in the book. For now, if you're importing data, just know that up to 10 fields are available to store that additional data.

Once you have selected all of the fields that you wish to import, your screen should look similar to this:



As you can see, the Preview looks pretty accurate. Before continuing, you'll want to look over the Preview one last time and make sure the way the system will be performing the import is, in fact, accurate.

Once you click the Import Now button, you will be asked to confirm that you want to do the import. If you click Yes, the system will then begin the import. If you have many records, please be patient as the import could take a while. As the system performs the import, it will inform you of its progress:



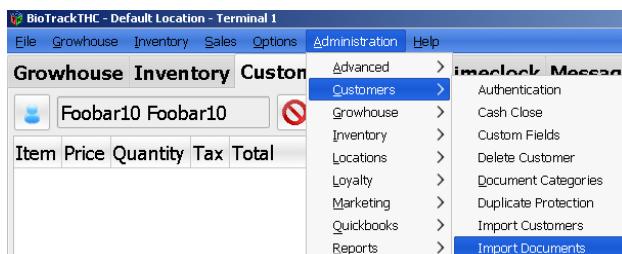
Once the import completes, you'll receive this popup:



Congratulations, the import was successful! If you assigned any of the custom fields, you will need to reload the program for those custom fields to appear.

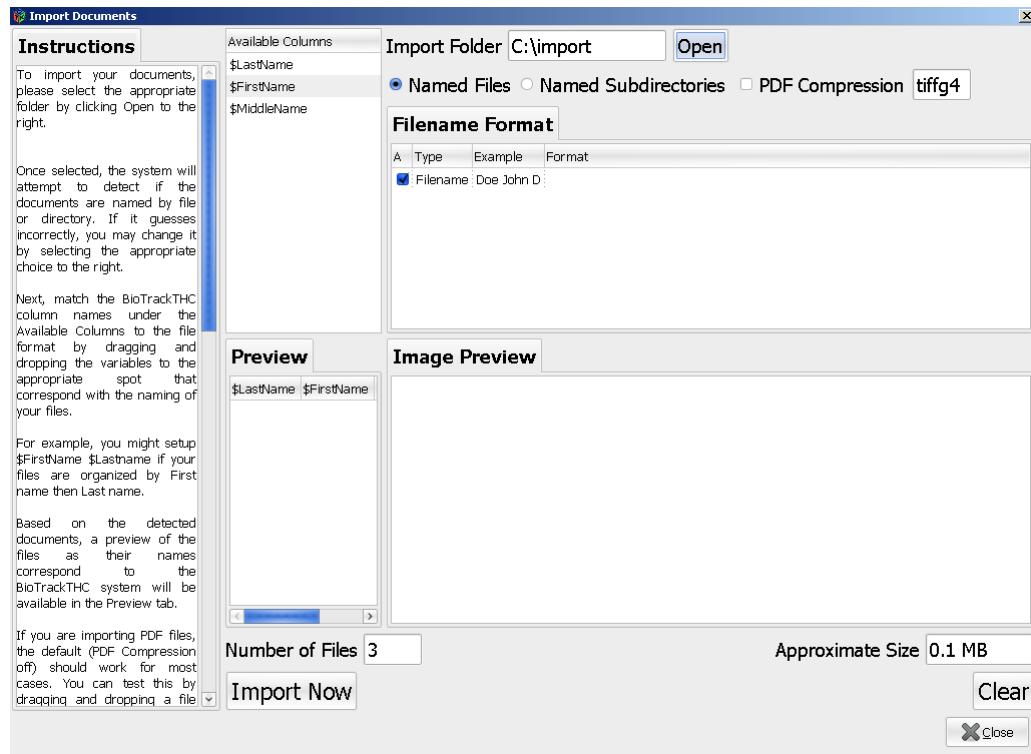
Importing Documents

If you were previously storing your documents electronically and would like to import those, you may do so through the Import Documents screen. Navigate to the Toolbar and click on Administration, Customers, Import Documents:



The Import Documents screen can be used to import documents in either image or pdf format that are stored on the computer you are performing the import from. The system supports two methods of importing documents to the correct customer's file. The first method requires each of your documents to contain the customer's first and last name (and, potentially middle name or initial is also helpful). The second method requires each customer to have their own folder whereby the folder can contain any number of images or pdf files named in any fashion. In this manner, the system knows

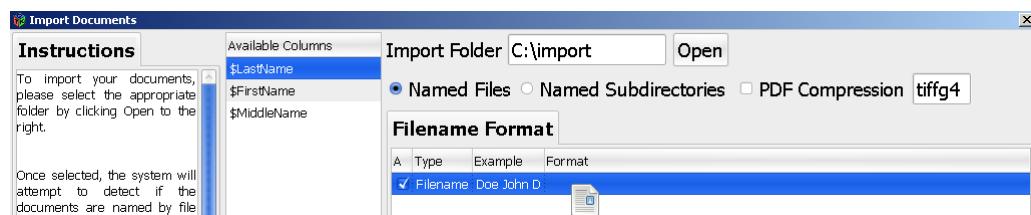
that any files underneath said folder will belong to the customer for which the folder is named.



To begin, first click on the Open button to select the folder where your files are stored. The system will attempt to automatically detect whether you are using Named Files or Named Subdirectories.

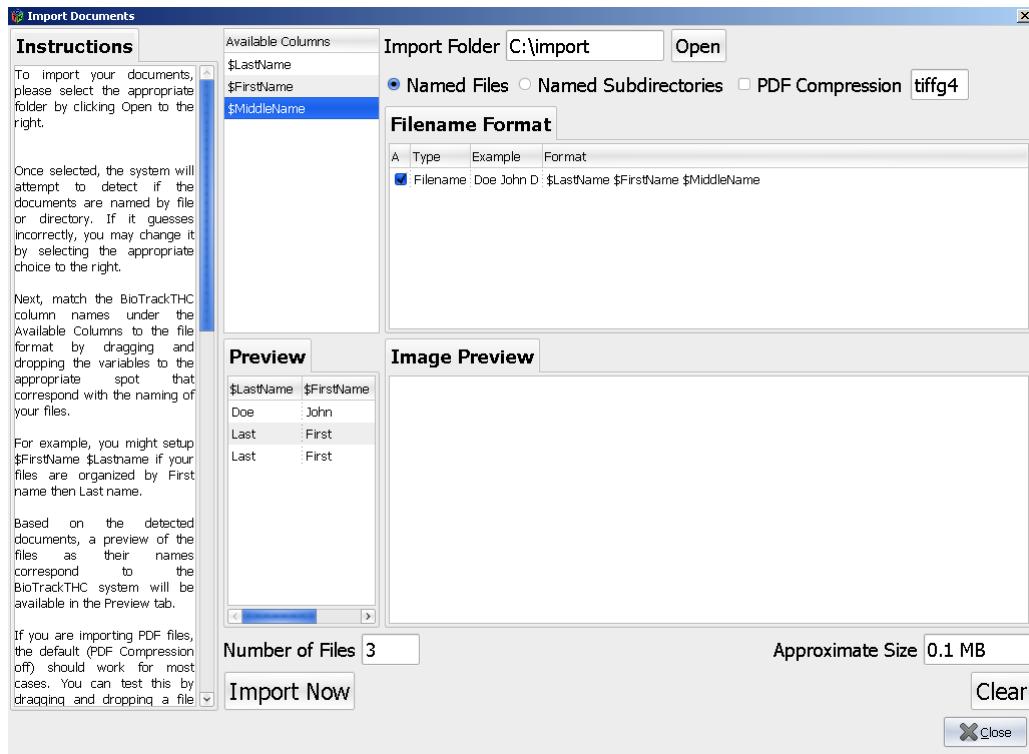
Once loaded, the system will display an example of the filenames in the Filename Format tab. In a similar method to the Import Customers screen, you'll want to drag and drop columns from the Available Columns onto the Format column to indicate to the system the format as it corresponds to the BioTrackTHC columns.

For example, the file that is displaying above is “Doe John D” which tells us that the format should be “Last First Middle”.



You can see in the image above that we begin by dragging \$LastName over to the Format column. Then, we proceed by dragging \$FirstName and then \$MiddleName.

Once we have completed the format to our satisfaction, your screen should look similar to the following:

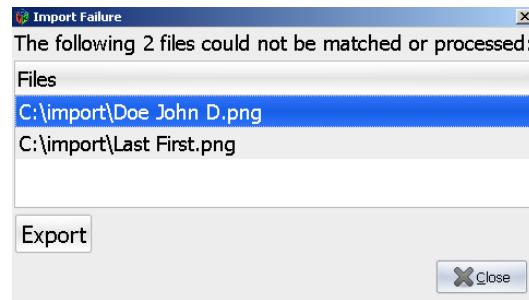


As you can see in the Preview tab, the system is matching up the first and last names of our files. In addition, if you scroll to the right in that window, you should see the middle names matching up, too.

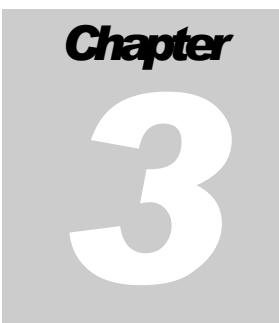
The Number of Files entry box will tell you how many files are detected in the directory and the Approximate Size tells you how much space the images will take up in the database.

The Image Preview can be used to ensure the images you are importing will import correctly. Open up a Windows Explorer window and try dragging and dropping an image to the window. For most image formats this is completely unnecessary, however, if your documents are stored in PDF format this is a recommended step. The reason being that some document scanners will apply compression formats before creating a PDF. You may have noticed a PDF Compression checkbox at the top of the screen; if dragging and dropping the PDF file does not preview the image correctly, you should try checking the box and drag and drop it again. The default compression method entered, tifffg4, is there because it is a popular (fax) compression method that some document scanners will use when creating PDF files. If this still does not work, you may need to consult your scanner's documentation regarding how it creates PDF files and try a different compression method.

When you have set the correct settings, click on the Import Now button to begin the process. After it has completed, you may receive the following window:



The system will do its best to match the names up to customers already in the system. If it cannot find a match, or, if it finds more than one match, it will not perform the import and instead will generate a list of non-matched files (as seen above) and allow you to Export that list and manually upload the files that weren't matched to the correct customer file.



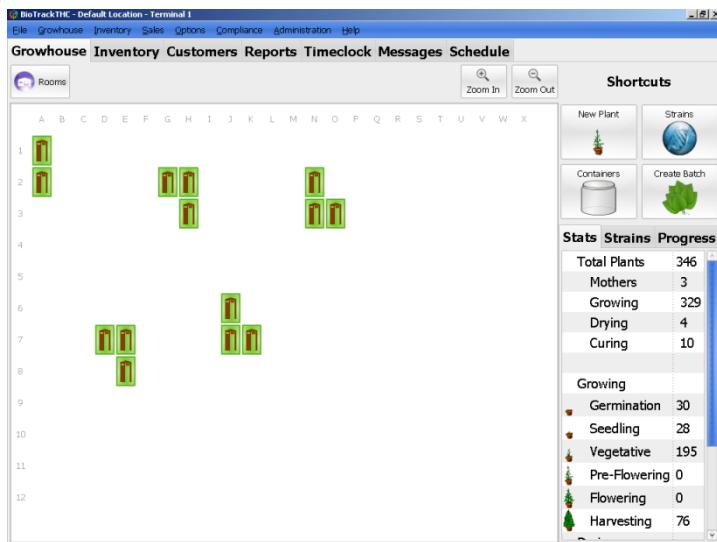
Chapter 3: Growhouse

In this chapter, you'll learn how to:

- ✓ Create new strains
- ✓ Create new plants
- ✓ Streamline the system to match your growhouse business logic
- ✓ Create new rooms and much, much more!

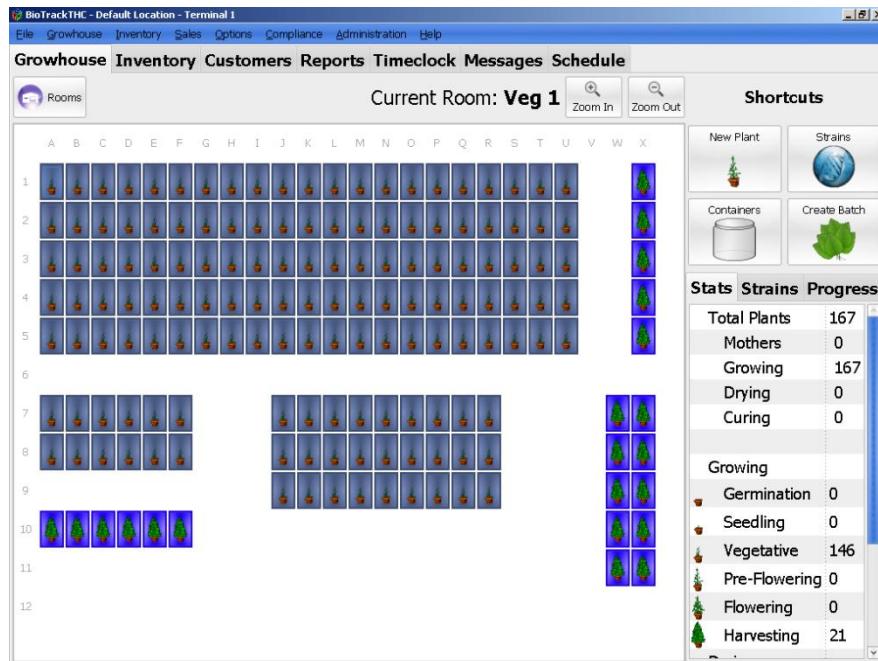
Growhouse Overview

Before we get into any specifics, let's first go over some basics on the Growhouse tab. Once you have logged in, you will see a screen similar to the following:

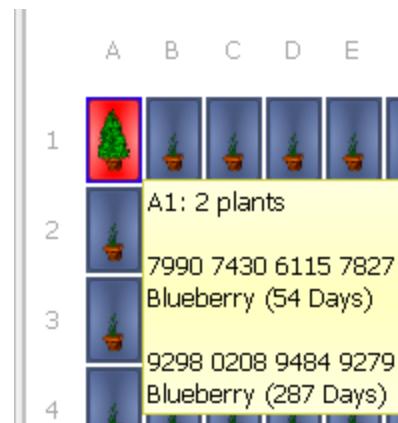


The Growhouse tab is divided into sections. At first glance, you'll notice the main section on the left hand side with a grid system divided into rows and columns. Each icon represents a room in your growhouse. You can add as many rooms to the system as you wish. Once you enter a room by clicking on it, the system will then display on

the grid all of the plants that have been placed into that room as shown in the screenshot below:



Every icon represented above represents a plant. Plants can also be stacked into one grid location, if the user so chooses. Hovering over a room will show the name of the room, likewise, hovering over a plant will show the barcode number of the plant, the strain and the number of days it has been in the room. In a stacked plant scenario, the following would appear, showing the information on multiple plants at once:



The Rooms button in the top left corner of the screen can be used at any time to return the user to the main rooms screen. The Zoom In and Zoom Out buttons allow a user to zoom in or out on the grid to see. If the user is not on the rooms screen and is instead looking at a specific room, the text to the left of the Zoom In and Zoom Out buttons will indicate the current room the user is in.

Plants can be moved from one grid location to another in the graphical view by simply dragging and dropping the plant to another grid location on the screen.

Hovering over a plant will also, if the plant is part of a group, highlight any additional plants that are also part of the same group (Plant Groups are explained in greater detail [later in the chapter](#)).

The Stats Tab

You'll also notice the Stats Tab to the bottom right on the main Growhouse screen. This tab allows a user to view, at a glance, basic stats about the growhouse.

Stats		Strains	Progress
Total Plants	346		
Mothers	3		
Growing	329		
Drying	4		
Curing	10		
Growing			
Germination	30		
Seedling	28		
Vegetative	194		
Pre-Flowering	0		
Flowering	0		
Harvesting	77		

The Stats Tab includes basic growhouse information, including: The number of mothers, the number of plants in the growing phase, the number of plants that are drying and the number of plants that are curing. The system further breaks down these stats to include how many are in each specific phase, e.g. how many are in Veg and how many are in Flower.

Please note that as you click into specific rooms, this tab will instead display the stats specific to that room ONLY.

Stats		Strains	Progress
122	White Widow		
117	Blueberry		
50	BTG		
45	Raspberry		
1	Blue Dream		
1	AK47		
▼ 167 Veg 1			
87	White Widow		
78	Blueberry		
1	Raspberry		
1	AK47		
▼ 31 Mother Room 1			

The Strains Tab breaks down the various strains in the grow. Initially, it gives a listing of the total number of each strain sorted numerically from most plants to least. Further down, you can see a room by room breakdown of how many are in each room.

Once again, if you click into a specific room, this data will only show the counts for that specific room.

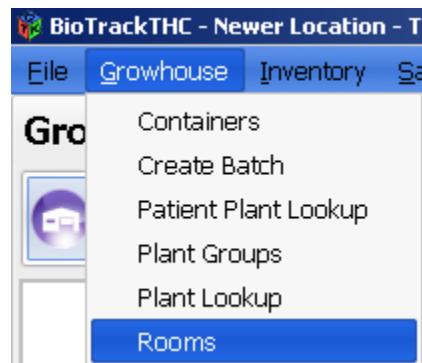
	Stats	Strains	Progress
▼	Veg 1		
▼	AK47		
1	20 days		
▼	Blueberry		
6	391 days		
3	331 days		
7	321 days		
8	297 days		
5	287 days		
7	285 days		
8	284 days		
4	245 days		
7	237 days		
1	217 days		

The final tab is called the Progress Tab. This tab breaks down the strain list even further by grouping plants not only by strain but by how long they have been in their respective rooms.

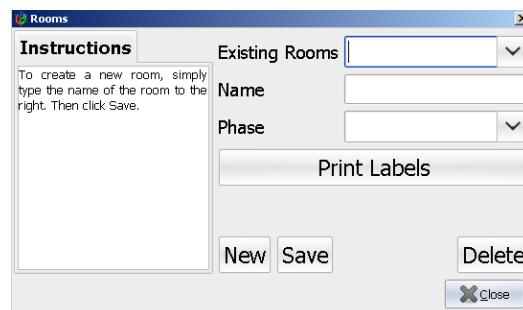
Again, if you have entered a specific room these numbers will only represent the plants in that specific room.

Rooms

Now that you have a basic understanding of the growhouse layout, we're going to begin covering the concept of rooms. By default, the growhouse will start with one room aptly named Default. To change the names of rooms or add new rooms, we'll need to access the Rooms popup. To do that, navigate to the Toolbar and click on Growhouse, then click on Rooms, as seen below:



This will then bring up the Rooms screen:



Creating a New Room

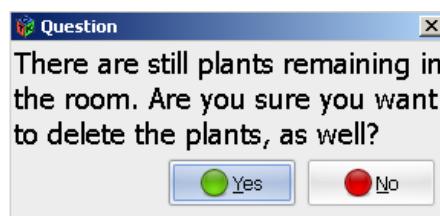
To create a new room, first click on the New button. Next, enter the name of the new room in the Name text box, e.g. Veg 1. The next field, Phase, is optional, but can be quite useful. This drop-down allows you to associate a room with a specific plant phase. In other words, if the room will only contain plants in the Vegetative phase, you would select Vegetative. By selecting this now, it will ensure that any plants moved into the room are automatically updated to the selected phase. There will be more information later in the chapter on [plant phases](#); for now, if you separate your rooms by phase, you'll want to select one now. If not, you can leave the Phase dropdown blank. Once you click the Save button the new room will now be saved and appear on the Rooms screen.

Modifying an Existing Room

The Existing Rooms drop-down can be used to access existing rooms. When first setting up your grow, you'll probably want to rename the Default room. To rename an existing room, click on the Existing Rooms drop-down and select the room you'd like to modify. Once selected, the name will appear in the Name entry box. Also, if the room has a phase associated with it; that too will appear in the Phase drop-down. At this point, you may now change the name or the Phase. Once you have finished making any changes, click on the Save button. To clear any changes made, click on the Clear button.

Deleting a Room

If you have created a room and find that that room is no longer needed, you can of course remove it from your growhouse. To do so, click on the room from the Existing Rooms drop-down. Once selected, click on the Delete button. The system will then prompt for confirmation that you do, in fact, wish to delete the room. If there are still plants in the room, the following will appear:

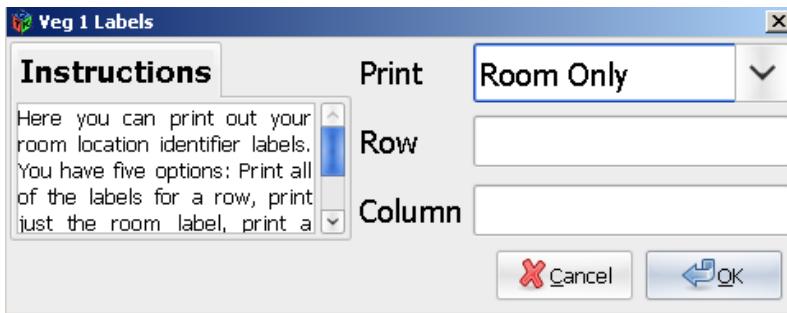


If you select Yes, any remaining plants that are in the room will also be deleted.

Printing Room Labels

The system was designed for the use of barcoding to help automate many of the processes within the system. Every plant is assigned a barcode, which easily allows a user to lookup a specific plant. In addition, however, every room can also have a barcode. This can automate the process of moving plants from one room to another. For example, if a user scans a plant barcode, then scans a room barcode, the system will then automatically move the scanned plant into the room that was scanned. The

room printing capabilities extend beyond simply printing room barcodes, however. The following screenshot demonstrates the label printing screen:



The Print drop-down is selected to Room Only, by default, which will print out a single barcode for a room, as described above. The additional options are: All Labels, Row, Column, Row and Column. As you may have previously noticed, the plant grid is setup with rows and columns.

All Labels will print out each grid location for that room; that is, if you have a 10x10 grid defined, all 100 labels for that room will print out starting with A1, A2, etc.

Selecting Row will allow you to print out all of the labels in one specific row, which you will need to enter into the Row text field. For example, if you entered 2 into the Row text field, the system would print out the labels A2, B2, C2, etc.

Selecting Column will allow you to print out all of the labels in one specific column. Thus, you will need to enter a letter into the Column text field. For example, you could enter the letter C to print all of the grid locations starting with C, e.g. C1, C2, C3, etc. The Column selection has one additional feature; if you enter a column letter, and also enter a range in the row field, you can choose to print out only specific grid locations in that column. For example, if you entered C into the column field and enter 2-5 into the Row text field, the system would then print out grid locations C2, C3, C4 and C5.

Finally, if you select the Row and Column option, this will allow you to print out ONE specific grid location. Thus, entering 7 into the Row field and D into the Column field, the system will print out the D7 grid location.

Generally, a center will only need to print out room labels once, when the system is first being setup. Many centers simply choose to print the Room Only labels. This allows a center to track their numbers and strain counts for each room with the ease of use of a barcode.

Other centers, however, will choose to print out the entire grid. This would allow a center to create an exact, digital representation of what their grow actually looks like. Such a center would choose to place the grid identifiers in a location near each plant. Thus, to move a plant, a user would first scan the plant, but instead of scanning the room barcode itself, a user would instead scan the grid identifier. So, if a user had

printed out the grid location A2 in their Veg room, by scanning a plant and then scanning that identifier, the plant would automatically move to the A2 grid location in the Veg room.

Using this method, a user could also easily stack plants, as well. For example, some centers prefer each plant icon to represent a table, with each table containing multiple plants. In such a scenario, a user would scan a plant, scan the grid location, and then do the same to the next plant until all of the desired plants were moved to the one grid location.

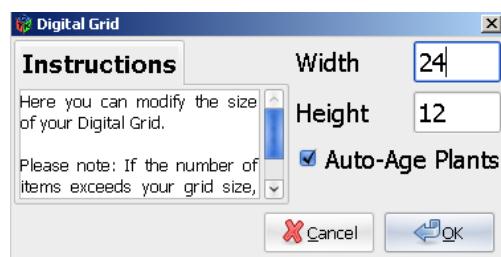
BioTrackTHC was designed to be extremely flexible; so you'll want to use discretion and determine the best method for barcode room printing based on how your grow is setup and how precise you would like to track your plants.

Configuring the Digital Grid Size

Now that we have discussed rooms and how they operate, it will be useful to discuss how to modify the size of the digital grid. By default, the system creates a 10 by 10 grid. But this can easily be changed by navigating to the Toolbar, then clicking on Options, Growhouse, Digital Grow Grid:



Which will bring up the following screen:



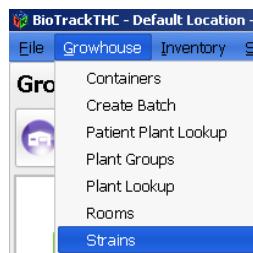
The width determines the number of columns in the grid. In this case, we have 24, so the grid will extend all the way to the letter X. The height controls the number of rows, in this case we have set the system to 12. The maximum size is 99 by 99. Although it might be tempting to simply enter the maximum size; that is most certainly **NOT** recommended. The more glyphs (grid locations) that need to be drawn to the screen, the more graphics processing power is required every time the screen is refreshed. On conventional computers, anything above 25 by 25 is considered quite CPU intensive. Keep in mind that if the number of plants exceeds the grid size, the system will automatically extend the grid and place them beyond the grid. On machines with

limited CPU resources, the other option is changing the view mode from the Graphical View (the default), to List View mode, which is described [later in the chapter](#).

The Auto-Age Plants option allows your plants to age automatically, according to a schedule you can determine, on a strain by strain basis, as described [later in the chapter](#). If disabled, the plant will only age when changed manually, or, when moved to a room that has been associated with a specific Phase. It is worth noting that a manual move or change will override the automatic mechanism.

Strains

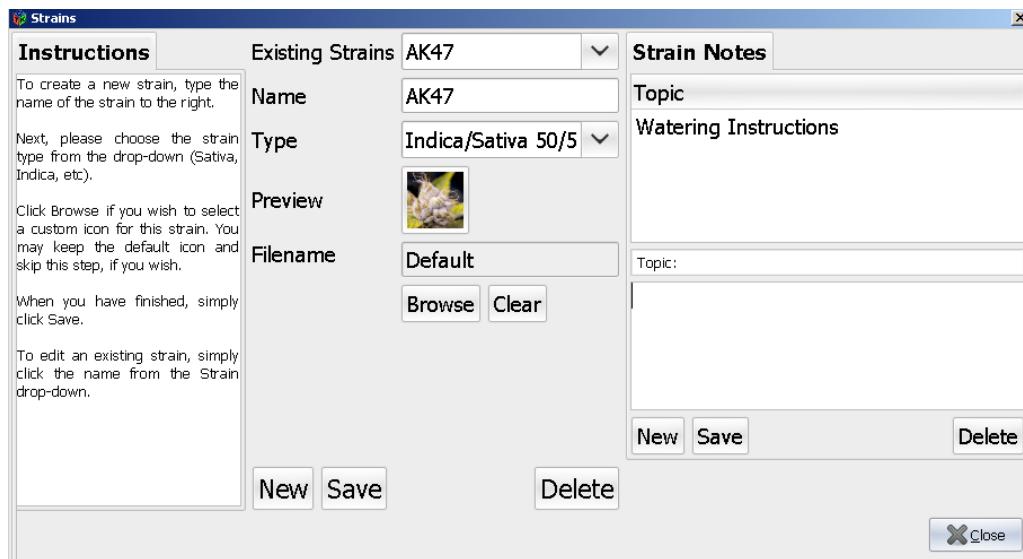
The next component of the growhouse are strains. Every plant must be assigned to a specific strain and they play a part later with regard to the dispensary, as well. To add new strains, navigate to the Toolbar and click on Growhouse, then click on Strains.



The Strains may also be accessed by simply clicking on the Strains button on the right hand side of the screen:



Once clicked, the Strains screen will appear:



Creating a New Strain

To create a new strain, first click on the New button. Next, enter a name for the new strain into the Name entry box. Next, you'll want to choose a Type from the Type drop-down, where the choices are: Indica, Sativa, Indica x Sativa (Indica dominant), Sativa x Indica (Sativa dominant) and Indica/Sativa 50/50. After selecting a Type, you may, optionally, also associate an image with the strain. To do this, click on the Browse button, navigate to where the image is stored on your drive and click Open. As this data is NOT linked to the sales end, most users do not choose to upload an image.

So, essentially creating a new strain is as easy as typing in a Name and selecting a Type. Once you have done so, simply click Save to save the new strain.

Modifying an Existing Strain

To modify an existing strain, click on the Existing Strains drop-down. After selecting a strain, the current Name and Type will be displayed. You may update either of these fields by changing the text in the Name field or the Type from the drop-down. After you have made the changes, simply click the Save button.

Deleting a Strain

To delete a strain, simply click on the Existing Strains drop-down. After selecting a strain, click on the Delete button. The system will then ask you to confirm this decision. After confirmation, the strain will no longer exist in the Existing Strains drop-down. Please note that any plants of the deleted strain that already exist in the system will retain their strain data.

Strain Notes

You may have noticed the Strain Notes tab in the Strains pop-up screen on the right side of the screen. Once a strain has been created in the system, you can add notes specific to that strain. These notes can be anything from what light, watering or nutrient schedule works best for the strain to ailments the strain is good for. That's

because the Strain Notes serve a dual purpose in the system. The Strain Notes are useful for growers to keep track of their growing tips, but, are also useful for indexing information to give to the sales clerks when dealing with customers. This will be discussed in a later chapter, for now, it's important to know the role the Strain Notes serve for growers. As we progress through this chapter and into later chapters, you'll see that, for convenience, there are many places to view and update Strain Notes.

Strain Notes are denoted by Topics and the body of the topic. To add a new strain note, click on the New button in the Strain Notes tab. Next, enter your note into the text box. Once the note has been completed, click into the Topic text box and type in a short description that described what the note is about. In the previous screenshot, we added a strain note with the Topic of Watering Instructions that could offer detailed instructions on a water cycle optimized for the selected strain. Once you have complete the note, click the Save button.

To view a note, simply click on the note Topic in the Topic listbox. This will then display the note with the note topic in the boxes below.

To update a note, click on it as you would to view the note. Next, you may now either modify the text in the Topic textbox (if you wish to update the name of the topic), or you may simply change the body of the note. When you have completed the changes, click Save to finish the modification. Clicking on the Clear button will undo any changes that have been made.

To delete a note, click on it as you would to view the note. Next, click on the Delete button. The system will then prompt you to confirm the action. Clicking Yes will then delete the strain note from the system.

Creating a New Plant

Now that we've gone through the Growhouse basics, it's time to get started by adding some new plants into the system. To get to the New Plant screen, make sure you're on the Growhouse tab. Next, look for the icon that says new Plant; it will look like the following:



Once clicked, you will be presented with the New Plant screen, as seen on the following screenshot.



This screen is basically your go-to place for adding new plants into the system.

The first field is called Source. This drop-down allows you to select whether the new plant(s) are from seed or from clone. By default, the Clone source is automatically selected.

The second field is the Strain. Every plant must have a strain and the Strain drop-down is a list of all the Strains you have added to the system.

The next field is Quantity. The number 1 is entered by default, but you may create up to 250 plants at one time.

The fourth field is Group. By default, a new plant or set of plants are not grouped together. If you wish to group the plants together, the next option besides No Group is Create Group. This will create a new group that will automatically take on the name of the strain and the date of creation. As you create groups, you will notice that within this drop-down, besides the No Group and Create Group selections, existing groups will also be a choice. This allows you to associate new plants with an existing group, if you wish. Grouping plants is useful if, for example, you have a number of plants of the same strain that you intend to keep on the same sort of cycle. Specifically, as detailed shortly in the chapter, you can keep notes on individual plants or, if they are part of a group, you can create one note that applies to all of them.

The fifth field is called Birthdate. By default, this will be the current date. However, if you click on the date a calendar will appear, allowing you to change the date. Many growers will only put cloned plants into the system after they have determined viability. As such, this allows you to put the accurate birthdate.



Simply double click on a day to set the date, or single click on a day and click the OK button.

The Room drop-down allows you to select the room you wish to create the new plant(s) in. By default, it will select whatever room you are currently in.

The Destination drop-down is optional and only applies to specific jurisdictions (e.g. Colorado) where a plant must be associated with a customer. This allows you to pull a customer from a specific dispensary location. If you only have one dispensary location, it will be automatically selected. Otherwise, if there are multiple dispensary locations within the system, you could select another location. Please note, this listbox will only populate with locations that have the Location Type set to Dispensary; Growhouse and Combination locations will not appear. The Destination selection operates on a best-effort basis, that is, if there are insufficient customers to choose from at one dispensary location, but others are available at a different Dispensary location, the system will assign the plants accordingly to ensure that every plant is always associated.

The Parent box allows you to tell the system, if this plant is from clone, the mother plant it was cloned from. This can be extremely valuable information as, detailed in a later chapter, there is a report that can calculate which of your mother plants is producing the best yielding offspring. The easiest way to select the mother is by simply scanning the barcode of the mother plant. Alternately, if you click on the Parent button, you can type the 16-digit barcode manually, as seen here:

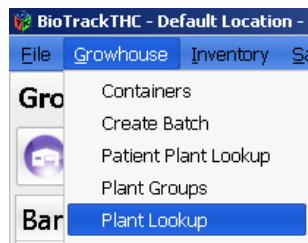


Finally, if the plant(s) you are adding to the system are, in fact, mother plants, you can check the box that says Mother Plant. In the Graphical View, mother plants will display with their icons upside down, for easy differentiation.

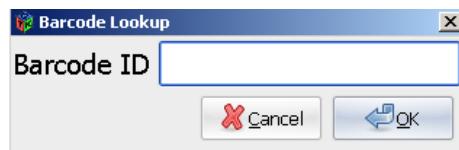
Once you are ready to create your plant(s), click on the OK button. After adding the plants to the system, the system will then attempt to print out barcodes for each individual plant. If you have previously associated a label printer; they will print automatically. If you have not, the system will now prompt you to select the printer you would like to print them to. If you choose not to print them, or if the computer you are creating the plants on does not have access to a label printer, don't worry as they can always be printed later.

Looking up a Plant

Your system has plants in the system and you know how to navigate yourself around the Growhouse. Now what? Well, now it's time to do something with those plants! For starters, let's do a simple plant lookup. The easiest way is to simply scan a plant's barcode. If you don't have access to the barcode, you can do a manual lookup by navigating to the Toolbar and clicking on Growhouse, then clicking on Plant Lookup:



Once the Plant Lookup screen appears, you may then type in a plant's 16-digit barcode number. You may type it with, or without, spaces.



After looking up a plant, you'll see the following screen:

Strain	AK47	Phase	Vegetative
Room	Veg 1	Birthdate	06/12/2012
Location	K2	In Room	21 days
Barcode	0472 6605 4742 5991		
<input type="button" value="Transfer"/> <input type="button" value="Print"/> <input type="button" value="Remove"/> <input type="checkbox" value="Mother Plant"/>			
Notes Strain Notes			
<input type="radio"/> Individual Note <input checked="" type="radio"/> Group Note			
<input type="button" value="New"/> <input type="button" value="Save"/>			
<input type="button" value="Reminder"/> <input type="checkbox" value="On"/> <input type="checkbox" value="Off"/>		<input type="button" value="Patient"/>	
<input type="button" value="Cancel"/> <input type="button" value="OK"/>			

The Strain drop-down will list the strain of the selected plant. In the case of a mistake when the plant was created, you can change the Strain here by simply clicking on the Strain drop-down and selecting the appropriate strain.

The Phase lists the current phase the plant is in, e.g. Vegetative, Flower, etc. This can be manually updated by simply selecting another Phase from the drop-down. If your plants are set to auto-age and you find many plants in a room in a later phase than they should be, you may want to consider turning off auto-aging, or, adjust the phase lengths for your strains (this will be described in detail, [later in the chapter](#)).

The Room drop-down lists the current room of the plant. If you're looking for an easy to move the plant from one room to another, without using room barcodes, you can simply select the new room from the drop-down to move the plant.

The Birthdate textbox lists the birthdate as set when the plant was created. This box does not currently allow the user to modify the birthdate after creation, but this may change in a future version.

The Location lists the grid location of the plant in the current room. Besides dragging and dropping, you can also use this textbox to simply type in the new grid location (e.g. change from K2 to L1).

In Room will tell you how long the plant has been in the current room. This can be used for the grower to determine how much longer the plant should be in the room before moving it.

The Barcode, of course, shows a visual image of the barcode of the current plant.

The Group lists the current group the plant is associated with, if any. If it is not associated with a group, you may select Create Group to create a new plant grouping from which you will later be able to add more plants to. Or, if you'd like to add it to an already existing group, simply select from the drop-down the group you'd like to associate it with.

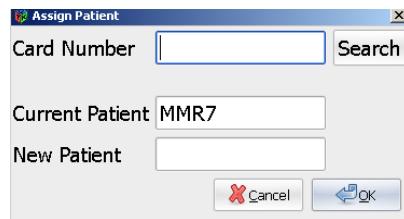
The Mother Plant checkbox allows you to set or unset whether or not the selected plant should be considered a Mother.

The Reminder button allows you to set a reminder on a plant for a later date and time. For example, if you have a grower that works Monday through Friday, and wants the weekend personnel to handle something with a specific plant, you could set a reminder such that the plant icon will flash once the reminder has gone off. The details of such a reminder could be set as a note (described shortly).



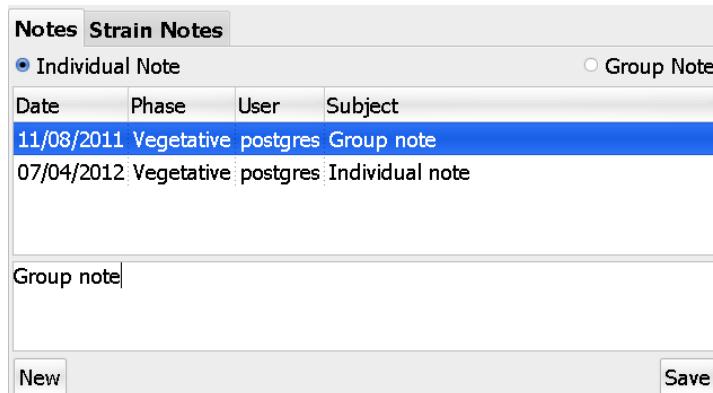
Once a reminder has been set, you can unset it by simply clicking on the Off button.

The Patient button with text entry box is relevant only to certain jurisdictions (e.g. Colorado). It will display the MMJ Card of the customer with whom the plant has been associated. If you wish to change the customer the plant is associated with, click on the Patient button and it will produce the following screen:



To re-assign, simply type in the MMJ Card number in the Card Number text field and click Search. If a successful match is found for your search, their card number will populate in the New Patient text box. The re-assignment is not final until you click the OK button.

The Notes tab allows you to add notes to a specific plant, or group of plants:



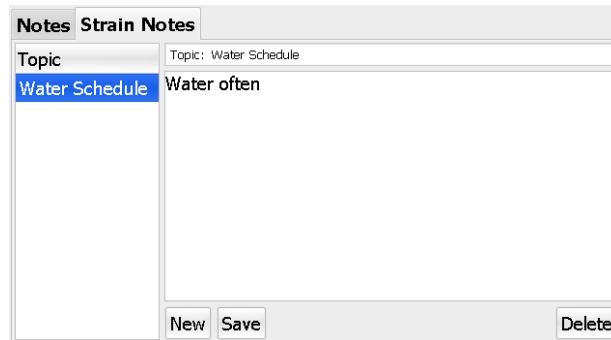
When opening a plant, it will automatically highlight the newest note. The note list includes the date of the note, the phase of the plant when the note was created, the user who created the note and the subject of the note; which is just in fact the first few words of the note.

To create a new note, first click on the New button. Next, type the note out. If the plant is part of a group and you want to apply this note to all of the similar plants in the group, make sure you select the Group Note radio button. If it is part of a group and you wish to enter the note just for this single plant, be sure to click on Individual Note. If the plant is not part of a group, Individual Note will automatically be selected for you. Finally, once you click Save the note will be saved and will appear in the listbox.

To update a note, simply click on the note you would like to update and update the text in the text box. After you have made the necessary changes, click Save.

Keep in mind that any notes added to a plant will follow it through to inventory when it gets to a dispensary. Because the system tracks everything from seed to sale, you'll always be able to go back and look at an item's history. For example, if you receive exceptionally good feedback from a customer regarding an item, you can go back to see if a grower did something different with the water cycle, light cycle, etc.

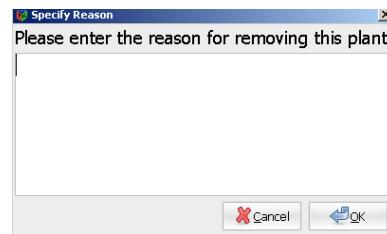
As you can see, the Strain Notes are nearly identical to what you've seen on the Strains screen, with just a slightly different layout:



This allows you to easily add Strain Notes as you're dealing with plants of the same strain.

The Print button will simply allow you to print out another copy of the plant's barcode should you so need to.

The Remove button will allow you to remove the plant from your growhouse in the case of an issue with the plant. It will first ask for confirmation. Once confirmed, the system will prompt the user for a reason to remove the plant.



After entering a reason and clicking OK, the plant will be removed from the system.

The Transfer button is used when you wish to transfer a plant as a sellable clone to your dispensary. Once clicked, the following screen will appear:

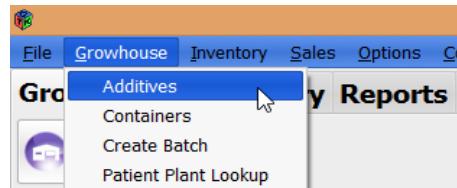


At this point, you may scan the barcodes on additional plants if you wish to transfer multiple plants at once. After scanning, click OK to move the plants into inventory. Once they are in your inventory, you can then transfer them from your growhouse to your dispensary (the actual inventory transfer process is covered in the [following chapter](#)).

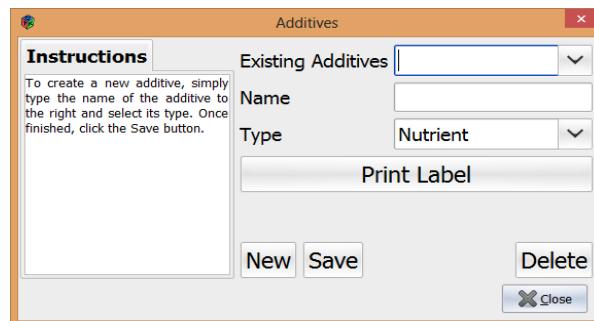
The Harvest button (or Cure button, depending on whether the selected plant is growing or drying) can be used to convert the select plant into its next stage. For a plant that is in the growing process, this allows you to collect certain derivatives (e.g. fan leaf) and record a wet weight. For a plant in the drying process, it allows you to also collect certain derivatives (e.g. kief), and take a dry weight. Also, once a plant moves from dry to cure, it is moved out of the plant grid and into the growhouse's inventory.

Additives

Any additives, such as MiracleGrow, that you use for your plants can be added to your system by opening the Growhouse menu, and clicking on Additives.



You will then see the following pop-up screen:



In this screen you will input the name of the additive and whether it is a nutrient or a pesticide from the drop-down menu. When you are finished, clicking the Save button will complete the process.

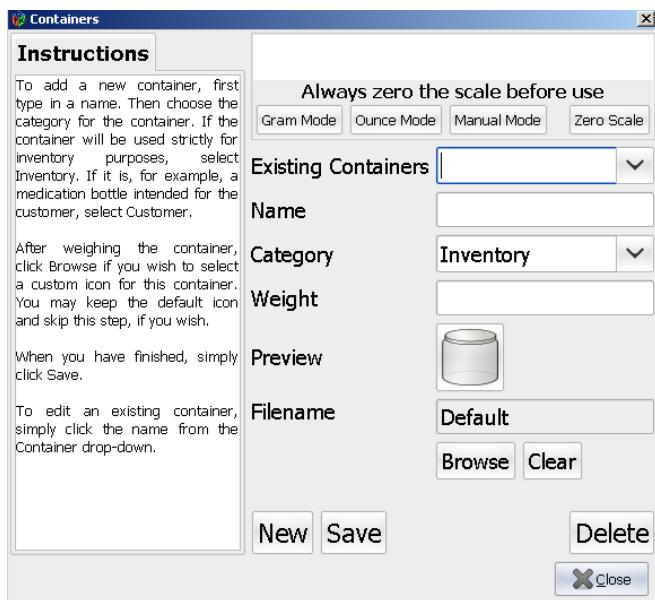
Your existing additives will also be available from this screen from the Existing Additives drop-down menu at the top. Selecting an additive and pressing the Print Label button will print the barcode label associated with the additive.

Containers

Before we delve into the Harvest and Cure process, a brief look at Containers is in order. The system has the ability to store the weights of various containers you may use regularly. This can help save time and reduce potential errors when you re-use the same containers over and over again by not requiring your users to re-tare (zero out) the scale every time. You can access the Containers screen in multiple ways. The first way is by navigating to the Toolbar and then clicking on Growhouse, Containers. Also, you can simply click on the Containers button:



Which will then show the Containers pop-up screen:



Creating a New Container

To create a new container, first click on the New button. Next, enter a name for the new container into the Name entry box. Next, you'll want to choose a Category from the Category drop-down, where the choices are either Inventory or Customer. Leaving the default Inventory should be fine for most cases. If you'd like, you may, optionally, also associate an image with the container. To do this, click on the Browse button, navigate to where the image is stored on your drive and click Open. Finally, you must weigh the container. If you are using an integrated scale, simply place the empty container on the scale. If you are not using an integrated scale, first weigh the container. Next, click in the Weight textbox. This will then popup the following window:



By default, Gram Mode will be selected, so any units typed will be considered to be in grams. By clicking on the Ounce mode, for example, the weighed item would then be considered in ounces. Thus, to continue, simply type in a weight and hit OK.

Finally, once a weight is being displayed, either through integrated or manual mode, click Save to add the new container.

Modifying an Existing Container

To modify an existing container, click on the Existing Containers drop-down. After selecting a container, the current Name and Category will be displayed. If you are using an integrated scale, the old weight will no longer appear and will be waiting for you to place a new weight on the scale. If you are in manual mode, the old weight will be displayed. If you wish to modify the weight in manual mode, click into the Weight textbox and then enter the new weight, as described above. After you have made the necessary changes, simply click the Save button.

Deleting a Container

To delete a container, simply click on the Existing Containers drop-down. After selecting a container, click on the Delete button. The system will then ask you to confirm this decision. After confirmation, the container will no longer exist in the Existing Containers drop-down.

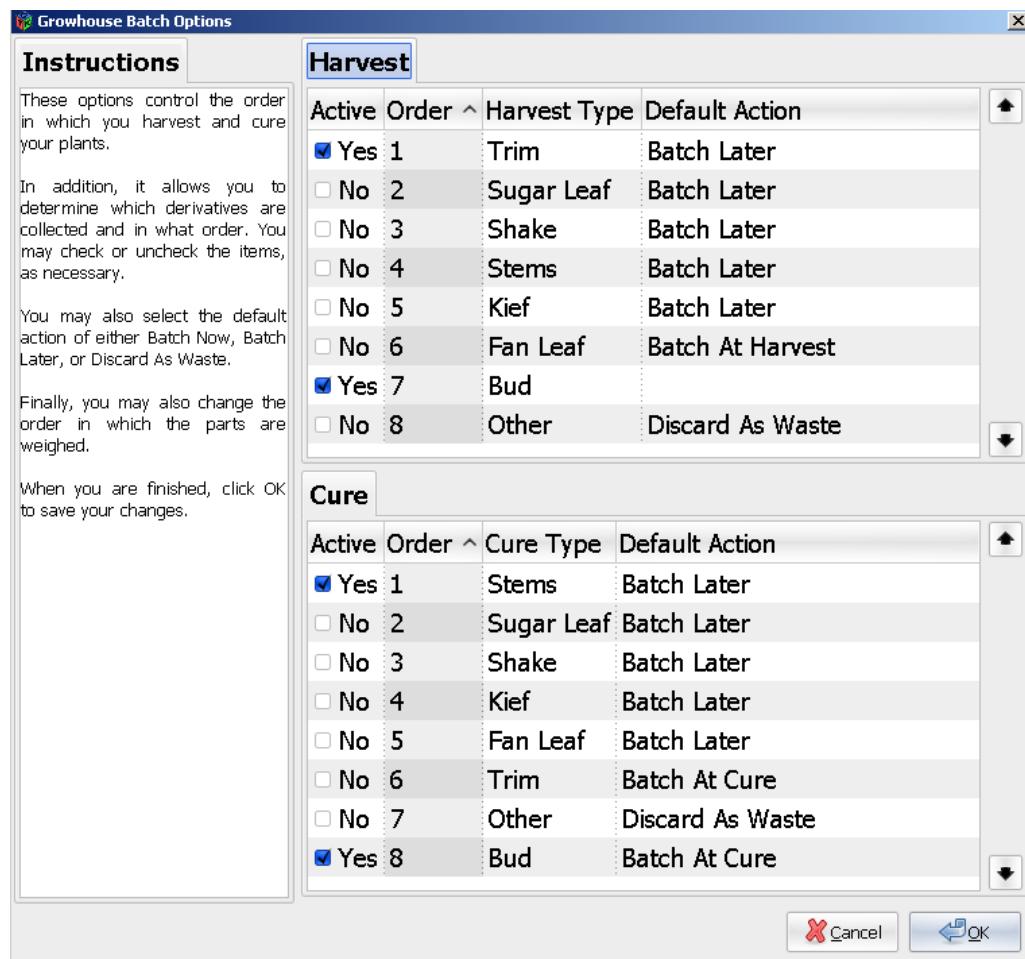
The Growhouse Batch Process Options

The final step in getting underway in the Harvest and Cure process is to actually customize how it is you would like to perform these processes within the system. The system can be configured to collect only the data that you require.

Let's have a look at the Batch Process Options screen by navigating to the Toolbar and click on Options, Growhouse, Batch Options:



Which will present this screen:



As you can see, there are many derivatives you can enable or disable as part of the Harvest and Cure processes. The Harvest process occurs when a plant has reached its maturity and is ready to be cut and dried. During this process, different centers will do it in different ways. For example, a center may choose to simply take the wet weight of the entire plant. Others may opt instead to trim the plant, then take the wet weight. If this is the case, they can also record the weight of the trim. At this point in the Harvest process, there are the following derivatives available: Trim, Sugar Leaf, Shake, Stems, Kief, Fan Leaf, Bud and Other. The only required item is Bud (taken as wet weight). You can then check off any additional items that you wish to collect.

The Default Action determines on the Harvest and Cure screens what is selected by default among the following three actions: Batch Later, Batch At Harvest and Discard As Waste. These options can always be changed on-the-fly during the actual process (as described shortly), but for now it's good to set them to what will most likely be chosen every time. Batch At Harvest will create a new barcode for the collected item. For example, let's say you chose to collect Stems and Trim as two separate items during the Harvest process. At this point, selecting Batch At Harvest would create a new barcode for the Stems and a new barcode for the Trim, while the plant would retain its original barcode. This allows you to track the new items wherever they may be destined for. For example, some centers will then wholesale out the stems and trim, while others will convert their Stems or Trim to hash oil or other derivatives. This allows the system to continue tracking items from seed to sale. The Batch Later option still allows you to track from seed to sale, but in a more generalized manner. That is, let's say you are harvesting 10 plants of the same strain. Instead of creating a new barcode for each batch of Stems, it will allow you to select at a later time (after all plants have been trimmed) the entire set of Stems and then create one barcode for the set. Discard As Waste will allow you to simply make a record of the weights of any items you are discarding. Though this is not normally useful, some jurisdictions may require you to note such weights.



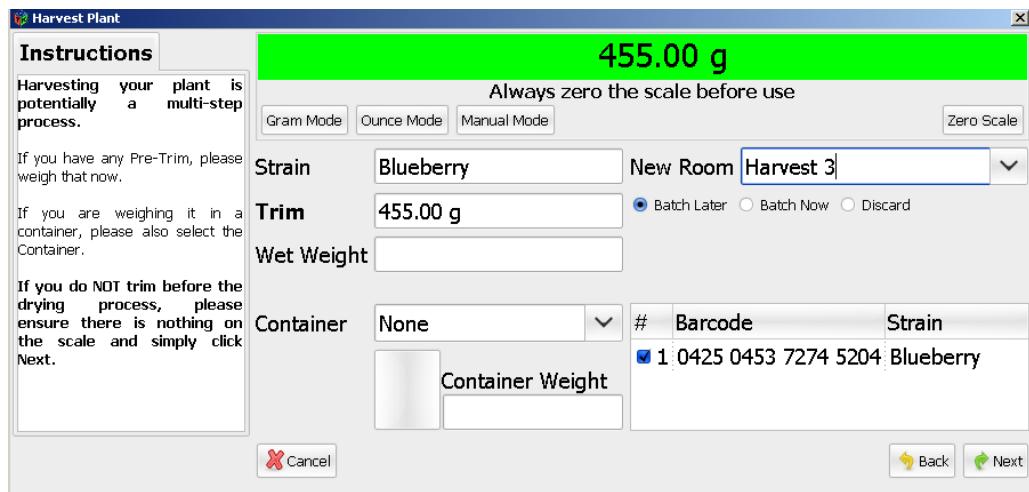
By highlighting an item, and then clicking on the Up or Down buttons: , you can move an item up or down for the order that your trimmers will be entering the data. For example, if you want them to enter Trim first and then the wet weight (Bud), simply move the Trim all the way to the top.

To get a better handle on these options, you may wish to come back to this after exploring the actual Harvest process in action; which is described next.

The Harvest Process

To begin the harvest process, first lookup a plant by either scanning its barcode or using the manual lookup method described earlier. Next, click on the Harvest button that looks like this:

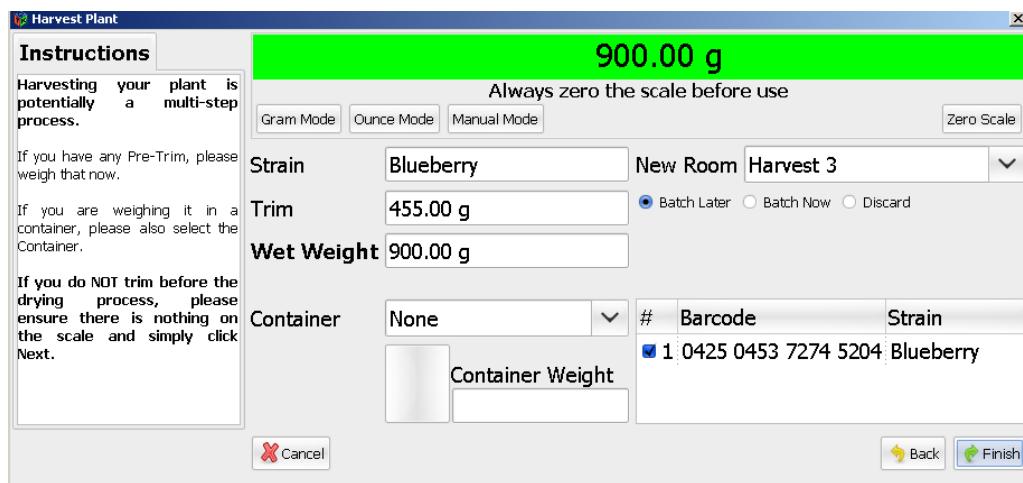




Because we setup our Harvest Batch Process Options to only require Trim and Bud (wet weight), these are the only options that show in the above screenshot. If we had selected other items, such as Stems, etc., they would have appeared here, as well. The first item (in this case, Trim) will be waiting for a weight to be entered. If you are using integrated scale mode, simply place the collected item on the scale. If you are using manual mode, click into the Trim textbox and then type in the weight. If the item in question does not have a weight for this particular Harvest, you may simply click Next. If you are weighing the item and using a pre-defined container, you may select that now from the Container drop-down. Once selected, you'll notice that the displayed weight is different from what you either enter or see displayed on the integrated scale. That's because the system will automatically subtract whatever the saved container weight is without further interaction.

To the right, you can select the New Room you would like to move the plant for the drying process. You can choose to leave it in the room it's already in and move it at a later time, as well, if you wish.

You may also notice the Batch Later, Batch Now and Discard options to the right of the various items you are collecting. They will be, by default, whatever was set in the Batch Process Options screen. But, you can change them on-the-fly as necessary. In the example above, we have set the Trim to Batch Later, so we will need to actually perform a Create Batch operation later. For now, we enter a weight for the Trim. In this case, we are weighing at 455 grams. To get to the next item, we must click the Next button, whether we are in Integrated or Manual weighing mode. If you are in manual mode and attempt to click into a different box and simply enter a weight, be aware that this won't work and the system will simply enter the weight into whatever item is currently active. The only way to enter the next weight is to click the Next button.



After clicking Next, we are going to enter a Bud (Wet Weight) of 900 grams. As you can see, because this is the final item we are being asked to account for, the Next button has changed to the Finished button. If we decide that we need to change the previously entered Trim weight, we can click the Back button. If at any time we decide we do not wish to proceed with the Harvest process, you can click the Cancel button.

Otherwise, you'll want to click Finish. Depending on what authentication method has been setup, the system will prompt for either a finger scan, PIN or simply allow you to proceed.

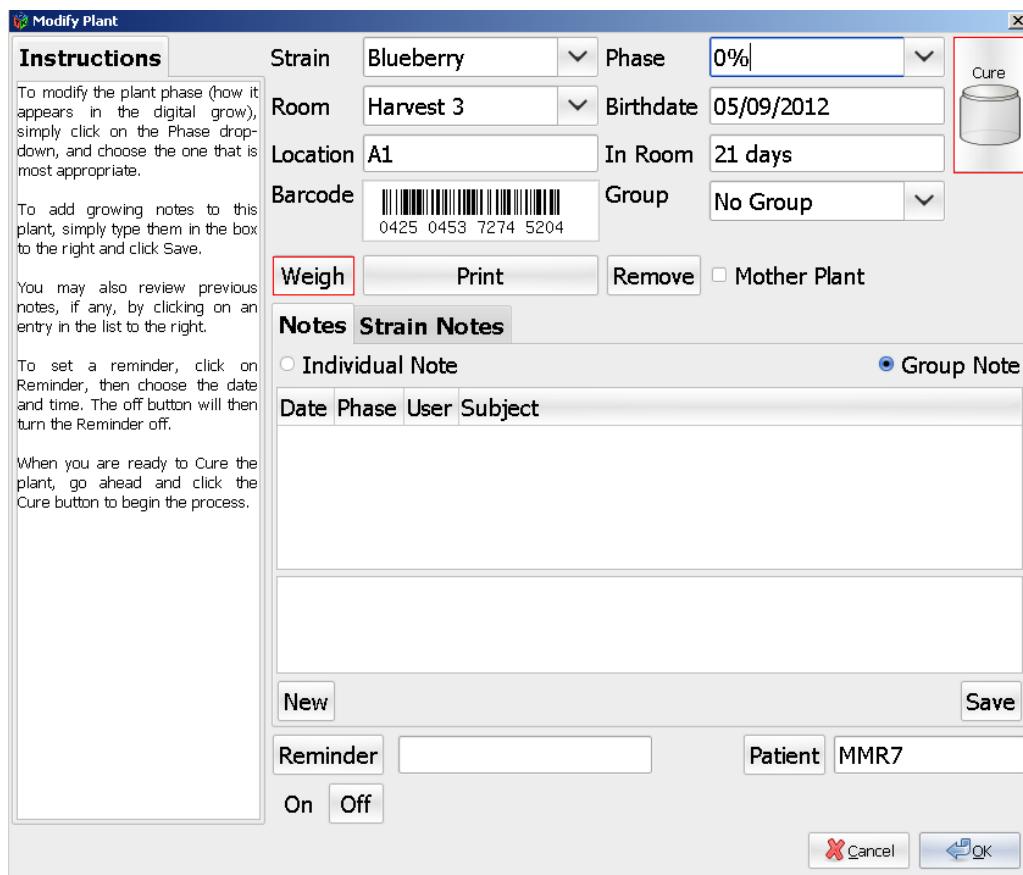
If we had, in this example, set the system to Batch Now, after clicking Finish a new barcode would be printed and our new Trim item would be sitting in our Current Inventory. In the [next chapter](#), we will cover in depth what happens to an item once it's considered Inventory.

Once successful, the Harvest window will disappear and the plant icon will now show that it has been moved into the Drying process. In addition, if you chose to move the plant to a New Room, it will no longer be displayed in the current room.

Before we proceed to the next topic, there is one last point that should be covered. You may have noticed a listbox with the columns of: #, Barcode and Strain. The plant that was selected will be input into this box by default. The system allows you to scan more plants during this process. In other words, if you harvest 5 strains at a single time and only record the total weight, you'll want to scan those barcodes now. By doing this, the system will split the recorded weight evenly among the 5 plants, for record keeping purposes (e.g. if the total was 900 grams, each plant would have a recorded weight of 180 grams) and the system will also record that these 5 plants have been “banded” together. So, once you move into the Cure process, simply scanning only one of the 5 barcodes will bring up the rest. Once again, you will only want to utilize this feature if you are not taking individual wet weights and are simply batching before the plants even go to dry.

The Cure Process

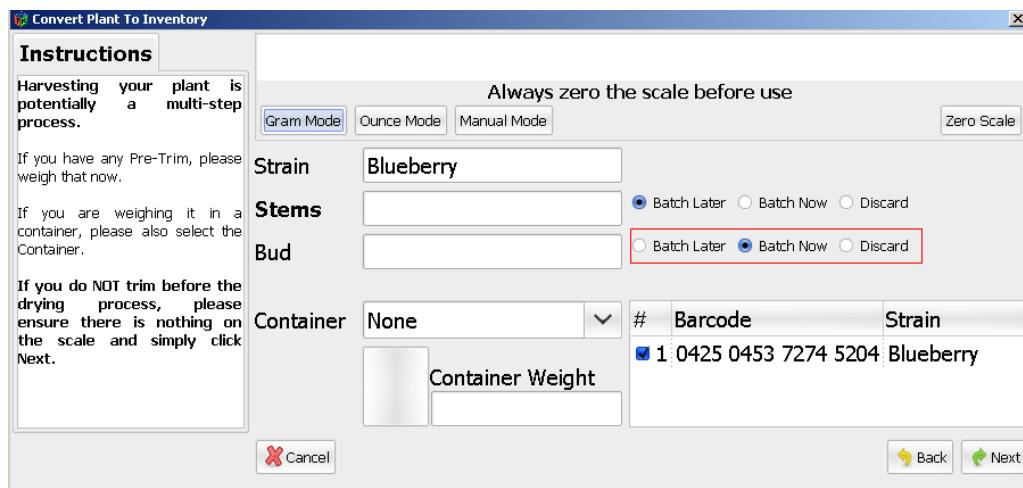
To begin the cure process, first lookup a plant by either scanning its barcode or using the manual plant lookup, as described previously. Please note that only a plant that has gone through the Harvest process can go through the Cure process. Once the plant has been located, the following pop-up screen will appear:



This is almost identical to the screen that appears when you lookup a growing plant. There are three differences, with the two important ones highlighted in red. The first change, not highlighted in red, is the Phase. You'll notice that it's a percentage instead of a term (e.g. Vegetative). If automatic aging has been turned on, this percentage follows the schedule setup for the strain. Most centers usually just look at the number of days the item has been in the room.

The first new button is called Weigh. This allows you to take intermediate weights on the drying plant and record them in the plant's chain of custody. Some centers utilize this to monitor the weight changes in the plant as it progresses from wet to dry.

The Cure button is the final difference, and it simply initiates the Cure process screen:



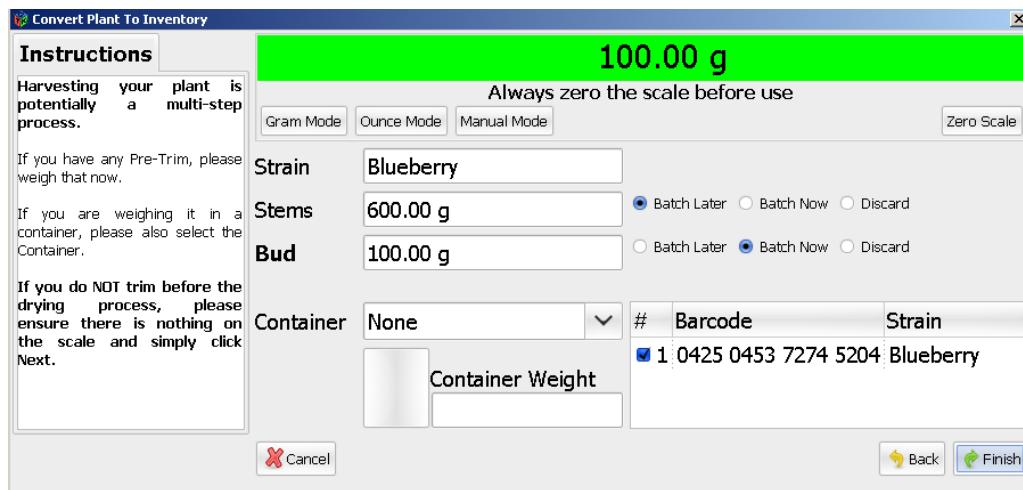
You'll once again notice that this screen is almost identical to the Harvest process screen. The New Room option is no longer there (as we are moving the plant into inventory), and the only major difference has been highlighted in red. For our setup, we have chosen to only collect Stems and Bud during the Cure process. As was discussed previously in the Batch Process Options, we can collect any of the following on this screen: Trim, Sugar Leaf, Shake, Stems, Kief, Fan Leaf, Bud and Other.

The red highlighted difference shows that we now have the option to Batch Later or Batch Now for the collected Bud. Previously, when we were recorded the wet weight, we did not have this option as the Bud was not considered inventory just yet (it still had to dry). Now that the Bud will be ready for transfer and sale, we must decide how it will be batched.

If we Batch Later, as was discussed during the Harvest process, we can use the Create Batch screen later to create an item collected from many different Bud items. Or, we can choose to Batch Now and receive a new barcode for the collected Bud. Please note that the system does NOT use the old plant barcode since the system differentiates between barcodes assigned to plants and barcodes assigned to sellable inventory.

If you Harvested multiple plants at once earlier in the process they will also appear in the bottom right hand box. You can also scan additional barcodes to add them to the listbox. If you do not wish to collect data from one of the barcodes that appears there or if you accidentally scanned the wrong barcode, simply unchecking the box will tell the system not to mark that barcode as completed.

In this example, we will enter the Stems weight and click Next. Then, we will enter the Bud weight:

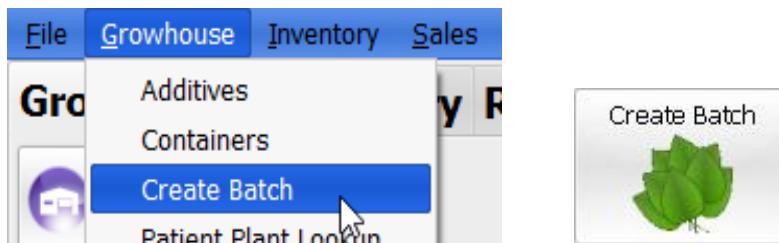


Finally, click on Finish to complete the Cure process. If any of your derivatives (e.g. Stems, Bud, etc.) were set to Batch Now, they will now be in your Current Inventory. Bud items in the inventory are considered to be in the Curing process until they are transferred to a Dispensary location.

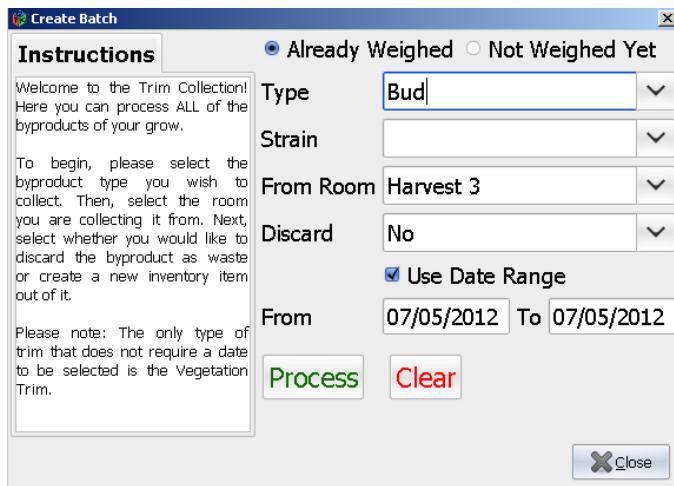
Creating Batches

There are two ways to create batches. The first way is to create a unified barcode for items that have already been accounted for through the Harvest and Cure process, but for which were set as Batch Later. The second way to create a batch is to create an item from previously unweighed data. That is to say, if you have trim simply lying around on the ground after a number of plants are Harvested or Cured, and would like to either account for the weight and discard the trim or would like to assign a barcode to it, you can do it through this screen, as well.

You can find the Create Batch screen by navigating to the Toolbar and clicking on Growhouse, Create Batch or simply click on the Create Batch icon:



Once clicked, you'll see the screenshot displayed on the following page:



Items already weighed

First, we'll cover how to create a batch for items that you have already weighed and accounted for, but were set to Batch Later either through the Harvest or Cure processes.

Make sure the Already Weighed radio button is set (it is by default). Next, select the Type of item you wish to collect. The available choices are: Bud, Fan Leaf, Kief, Other, Shake, Stems, Sugar Leaf and Trim.

Once you have selected a Type, you may now, optionally, select a Strain. This can be useful if you are creating a strain specific batch and do not wish to accidentally select other strains that have been Batched Later.

The From Room drop-down is also optional. It will only allow you to display only plants that were Harvested or Cured from a specific room. This can be useful if you have many plants that were Batched Later and are still waiting to be assigned a barcode.

The Discard drop-down is set to No by default. If there are certain derivatives that were Batched Later, and instead, you meant to simply Discard them as waste, this drop-down will allow you to do so. In most instances, you will want to keep this set to No.

The Use Date Range checkbox and accompanying date range allows you to select only those plants that were Batched Later between the accompanying days. If you have many plants outstanding, setting this can make finding the right plants you wish to batch that much easier. It is set to today's date by default. Unchecking this will show you ALL items outstanding that match your search, regardless of when they were Batched Later.

When you have set the parameters you are looking for, click on the Process button. If, for whatever reason, there are no outstanding matches for your search, you will receive the following error message:



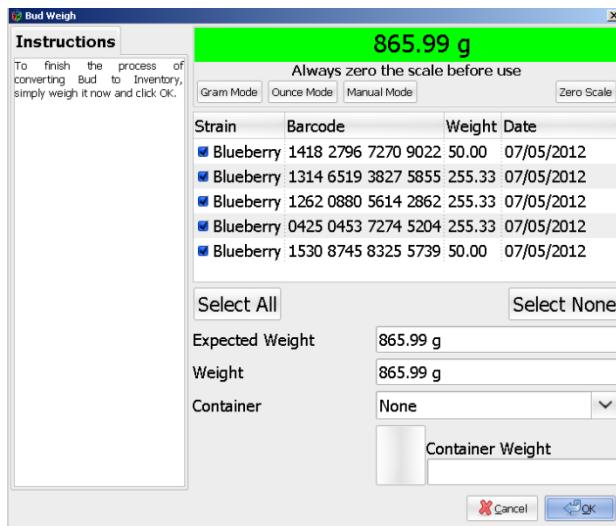
If this occurs, you may wish to remove some of the restrictions on your search (e.g. remove the Use Date Range option, remove the Room, remove the Strain, etc.). If there is still nothing showing up, and you are sure that the plants you are looking for were Batched Later, then this means that another user has already accounted for them. You may wish to check your Current Inventory (as discussed in the [next chapter](#)) to locate what it is you are looking for.

For example, we are going to run a search on Bud that has been Batched Later sometime within the last day and only matches the strain Blueberry.

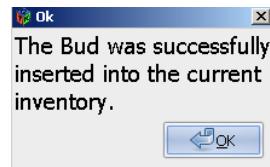
Strain	Barcode	Weight	Date
<input checked="" type="checkbox"/> Blueberry	1418 2796 7270 9022	50.00	07/05/2012
<input checked="" type="checkbox"/> Blueberry	1314 6519 3827 5855	255.33	07/05/2012
<input checked="" type="checkbox"/> Blueberry	1262 0880 5614 2862	255.33	07/05/2012
<input checked="" type="checkbox"/> Blueberry	0425 0453 7274 5204	255.33	07/05/2012
<input checked="" type="checkbox"/> Blueberry	1530 8745 8325 5739	50.00	07/05/2012

As you can see, we have 5 outstanding Blueberry plants that were Batched Later but still have not been accounted for. The system will add up the individual weights of the plants selected and give you a total Expected Weight. You can choose to uncheck certain plants if you are only collecting from some of them. The Select All>Select None buttons allow you to easily select or unselect all of the items, if there are a lot of plants displayed.

At this point, using an integrated scale you can weigh the selected items as one. Many centers, even if they are using an integrated scale, will choose to switch over to Manual Mode and simply enter the Expected Weight. This screen was designed to allow you to enter a more exact weight, taking into account any moisture loss since the individual weights were taken. That being said, many centers will simply allow the system to take this into account when they transfer it to the dispensary and take the weight difference then.



Now that we've entered a weight, click OK to complete the process. Once completed, you'll receive a confirmation:



If you so desire, you can then click onto the Inventory tab, check off the new inventory item and print the barcode.

Items not weighed yet

Now it's time to cover the other capability of the Create Batch screen, which is to create batches out of items that have not been weighed yet. Out of the available Types in the Type drop-down Bud is the only item that cannot be collected. This is because the only way to account for Bud weight is through the Cure process.

Most centers will utilize this process for times when they have collected numerous amounts of various Stems, Shake, etc. from a room and cannot pinpoint it to any particular plant, but wish to account for it. This feature will allow such a center to accomplish that and, furthermore, attach the seed to sale tracking to any plants currently in the room.

Another known use is for jurisdictions where a center must report weights of non-medicated derivatives (e.g. Vegetation Trim) and track them back to the original plants.



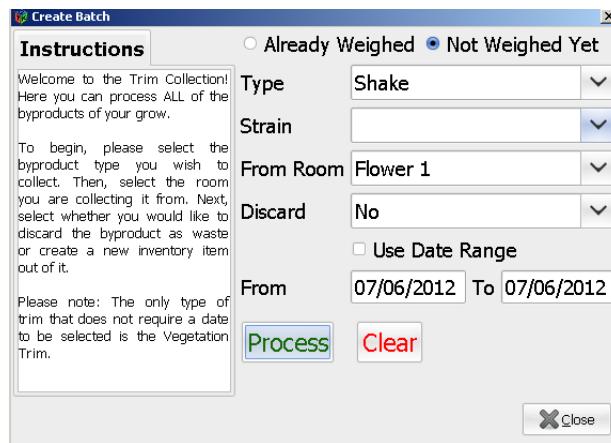
So, to begin, First we'll select the Not Weighed Yet radio button.

Next, you may select the Type. In this example, we'll use Shake.

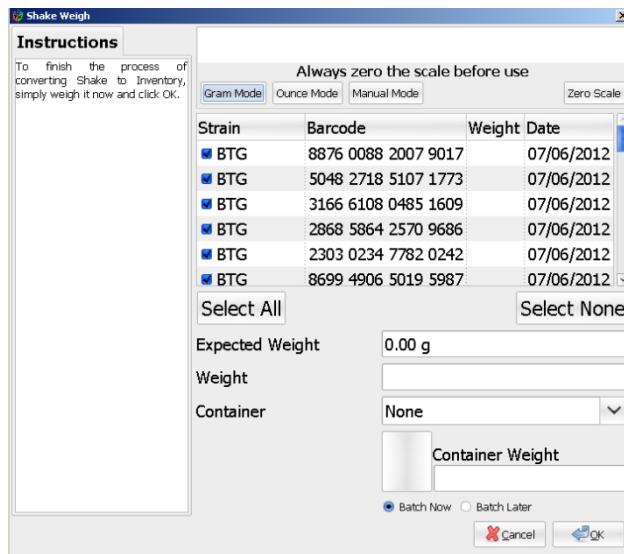
We'll leave the Strain blank because we want to set the collection as being from all plants in the room.

Now we'll select the Room, in this case it's named Flower 1.

The date range is actually irrelevant for items that have not been weighed yet, so you can either leave it checked or not; it makes no difference.



Once we click Process, we'll see a screen very similar to the Already Weighed batch collection screen:



There are two main differences. The first is that the Expected Weight is 0. In other words, there is nothing the new weight is being compared against.

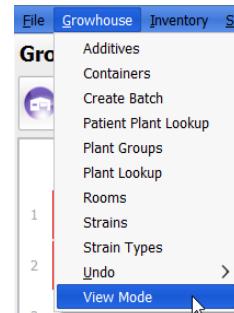
The second difference is near the bottom where you have two options: Batch Now and Batch Later. Batch Now is selected by default and is most likely the option you'll

want to select every time. This will immediately create a new barcode for the item; in this case for our collected Shake. However, you do have the option to Batch Later, thus requiring you to, at a later point, use the previous already weighed method to create a barcode.

Once you have entered the weight simply click OK to finish the process.

Growhouse View Mode

Now that we've covered an A-Z walkthrough of the grow process, it's time to introduce you to some shortcuts and additional features of the Growhouse. You've noticed throughout our growhouse introduction the graphical interface that allows you to view your plants in a manner consistent with what it looks like physically. However, this method is not always the most efficient for every operation. To switch the growhouse to List View mode simply navigate to the Toolbar and click on Growhouse, View Mode:



In this mode, here's what the room view will now look like:

Rooms	
Room	Location
Veg 1	A1
Veg 3	A2
Flower 1	G2
Flower 2	H2
Clone Room 1	N2
Flower 3	H3
Clone Room 2	N3
Clone Room 3	O3
Harvest 1	J6
Mother Room 1	D7
Mother Room 2	E7
Harvest 2	J7
Harvest 3	K7
Mother Room 3	E8

Details Move Print Harvest/Cure Transfer Clone Reassign Remove Select All

To enter a room, simply double click on the room you would like to enter. Or, you may also highlight the room and click on the Details button.

Once inside of a room, the screen will now look like:

Rooms								Current Room: Veg 1		
Barcode	Strain	Phase	Birthdate	Time in Room	Column	Row	Group			
■ 0472 6605 4742 5991 AK47		Harvesting 06/12/2012 52 days		K	2					
□ 1332 2282 1474 1207 AK47		Vegetative 08/03/2012 0 days		A	6					
□ 2758 4338 5590 4752 AK47		Vegetative 08/03/2012 0 days		P	5					
□ 4233 7590 7617 8230 AK47		Vegetative 08/03/2012 0 days		C	6					
□ 7736 9804 4430 4588 AK47		Vegetative 08/03/2012 0 days		D	6					
□ 8105 3895 0387 4344 AK47		Vegetative 08/03/2012 0 days		B	6					
□ 3076 2115 4487 3055 Blueberry		Vegetative 09/19/2011 319 days		G	4		Blueberry 09/19/2011			

Details Move Print Harvest/Cure Transfer Clone Reassign Remove Select All

The room list view has the following columns: Barcode, Strain, Phase, Birthdate, Time in Room, Column, Row, Group, Mother, Patient, Destination and Reminder. By clicking on the column name you can sort the list according to your wishes. For example, by sorting first by the Row, then clicking on Column, the list will be listed in a manner similar as you might see it visually. Thus, the List View will allow a user to quickly and easily view detailed data about their plants without the need to run a report. In addition, you will notice that List View is much faster when switching back and forth between rooms; so it can be extremely useful when completing multiple operations.

The Details button is another way to do a simple Plant Lookup. You may also double-click on an item to achieve the same effect, as well.

The Move button allows you to move one or more plants from one room to another all at once, without the need to scan a barcode. Once you have checked off the plants you wish to move and click the Move button, the following screen will appear:



First, you will want to select the new room you wish to move the plants to from the Room drop-down. Once you have selected a room, then you must decide if you would like the system to assign a new grid location to the plants, based on grid space availability or whether you would like them to be in the same exact spot in the new room. In most cases you will want to leave this checked. Click OK to proceed with the move.

The Print button allows you to print one or more plant barcodes at once by simply checking off the barcodes you wish to print.

The Harvest/Cure button can help streamline the process of selecting multiple plants at once for the Harvest or Cure process. For example, through the Graphical View, you would need to scan the barcode of one plant, click on Harvest, then scan the

additional barcodes of plants you wished to also Harvest at the same time. This button allows you to simply check off the plants you wish to group without scanning any barcodes. The same can be said of the Cure process. However, users should be cautious when selecting multiple plants that are already in the Drying process. If a grouping was already done with the Harvest process, selecting one and only one of those plants in the group will automatically populate the rest. But, if a user selects more than one plant to Cure, the system will disregard any previous grouping and thus allow the user to override that grouping.

The Transfer Clone button also streamlines the process of transferring plants that are intended to be sold to customers as clones without requiring barcode scanning. Simply check off the plants you would like to transfer and then click the Transfer button. When the Transfer screen appears, click OK to proceed.

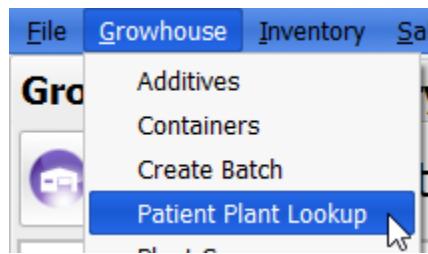
The Reassign button allows you to reassign the customer associated with multiple plants at. The system will prompt you to (optionally) select the location you would like to pull the customer assignments from. If left blank, the system will simply choose available customers at random. If there are no customers with available plant limits at a chosen location, the system will fallback to additional locations.

The Remove button allows you to remove multiple plants at a time. Check off the plants you wish to remove and, after confirmation and stating a reason for the removal, the plants will be removed from the system.

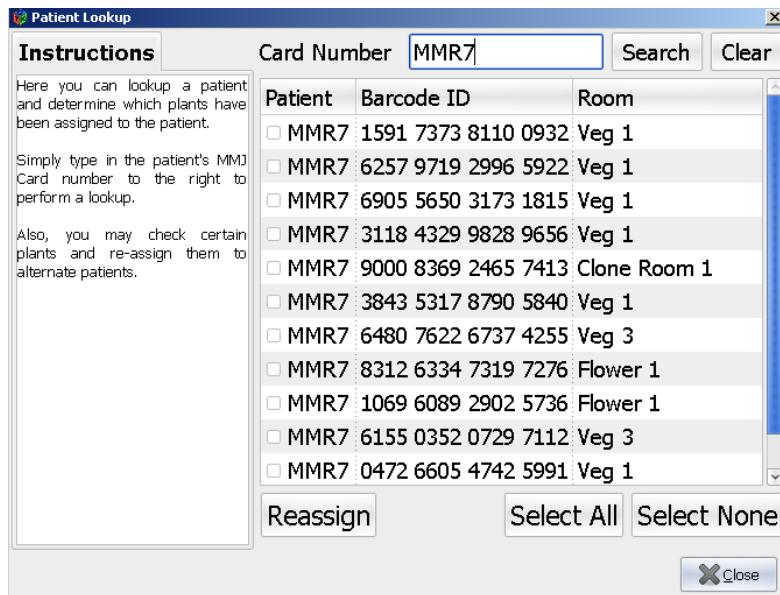
The Select All button will allow you to select all of the plants in a specific room. Once clicked, the button will change to the Select None button, which will then uncheck all of the plants on the screen.

Lookup a Specific Customer's Plants

To lookup a specific customer's plants, navigate to the Toolbar and click on Growhouse, Patient Plant Lookup, as seen in the following screenshot:



Which will present the following screen:



In the example above, we have already completed a search for a specific MMJ Card number. On this screen, we can not only see a specific customer's plants but we can, if necessary, reassign them as well. If you would like to reassign plants, simply check the plants you wish to reassign (or click Select All to reassign all of them), and click the Reassign button. The system will then prompt for a confirmation similar to the following:



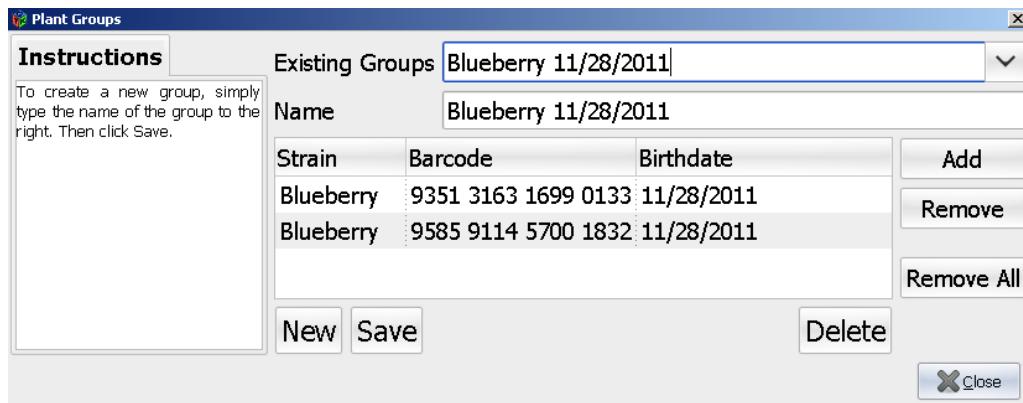
Clicking Yes will then reassign the selected plants to customer's who have not exceeded their plant count.

Plant Groups

The subject of plant groups has been discussed previously in the chapter both when [creating new plants](#) and also when [looking up an existing plant](#). There is also a way to manually add plants to an existing group, create a new group, and view the plants already in an existing group. To begin, navigate to the Toolbar and click on Growhouse, Plant Groups:



This will then bring up the Plant Groups screen:



Creating a New Plant Group

To begin, first click the New button. Next, you'll want to type in a name for the new group. Now, click on the Add button and type in the 16 digit barcode of the plant you'd like to add to the group. You may then continue to add more plants until you have added the plants you wish to the group. If you have mistakenly added a plant, you may highlight it and click the Remove button. Once you are satisfied, simply click Save to create the new plant group.

Modifying an Existing Plant Group

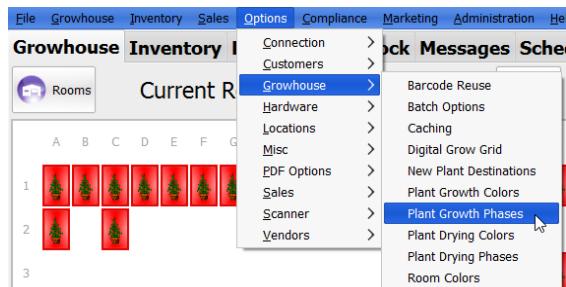
To modify an Existing Plant Group, simply click on the Existing Groups drop-down and select the group you wish to modify. Next, you may now add additional plants by clicking Add or you may also remove plants from the group by simply highlighting them and clicking on the Remove button. Click Save to complete the changes.

Deleting a Plant Group

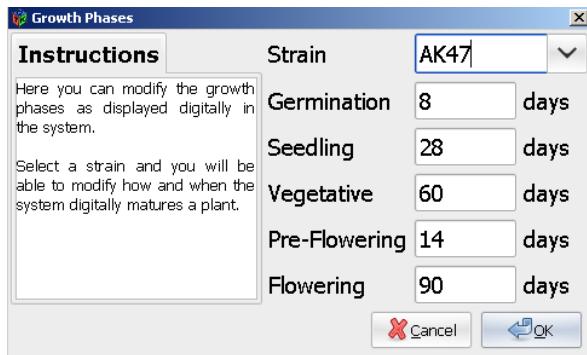
To delete a Plant Group, simply click on the Existing Groups drop-down and select the group you wish to delete. Then, click the Delete button. The system will, of course, ask for confirmation. Once confirmed, any plants within the group will still exist, however, they will no longer be grouped together.

Plant Phases

A plant will automatically change Phases as defined by the Plant Growth Phases options, if auto-aging has been turned on. To modify a strain's Growth Phase, navigate to the Toolbar and click on Options, Growhouse, Plant Growth Phases.

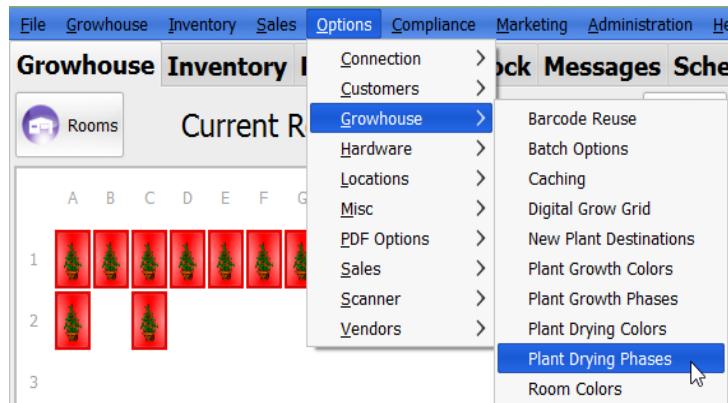


This will bring up the Plant Growth Phases screen:



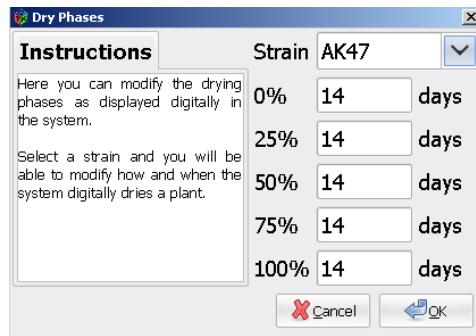
Every strain, when created, will receive the above default aging schedule. This can easily be changed above by first selecting a Strain from the Strain drop-down. Next, you'll notice a number of days next to each phase. This is the length of time a plant must be in that phase before it automatically progresses to the next phase. In the example above, a plant will stay in the Seedling phase for 28 days before it automatically progresses to the Vegetative phase. After you have made the necessary changes to the specific Strain's aging schedule, click OK to save any changes.

The Plant Drying Phases can be modified via the Toolbar, Options, Growhouse, Plant Drying Phases:



This will then present the Plant Drying Phases which, like the Growth Phases, have a default value set whenever a new Strain is added. The phases for drying, however, go by a percentage completion, from 0 to 100. Each 25% interval is assigned a number of days until that phase change. The phase changes are denoted in the Graphical View Mode by different colors, which may be configured.

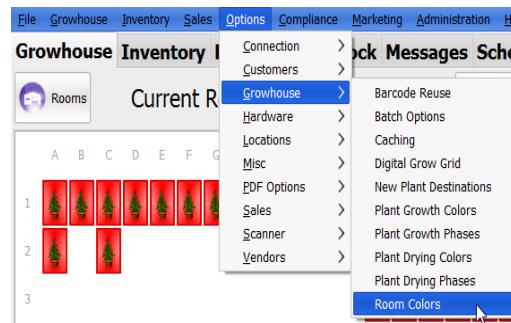
Here is what the Plant Drying Phases screen will look like:



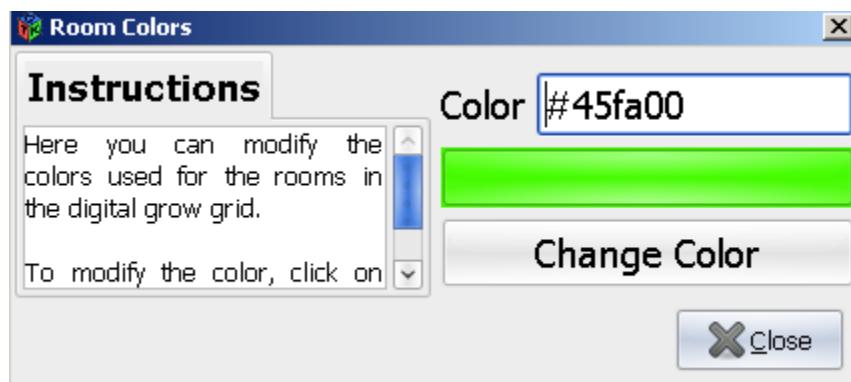
Simply make the changes to the drying schedule that you wish, and click OK to save the changes.

Colors

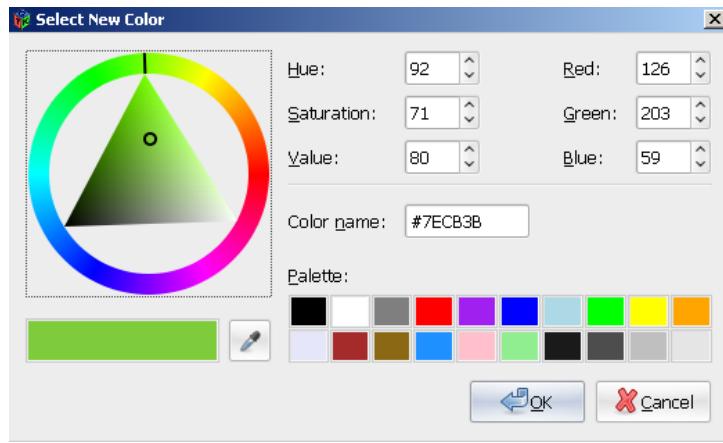
In the Graphical View Mode, the plant colors, drying colors and room colors can be configured to your liking. To begin, let's start with configuring the Room colors. You may do this by navigating to the Toolbar, then clicking on Options, Growhouse, Room Colors:



Which will bring up the following screen:

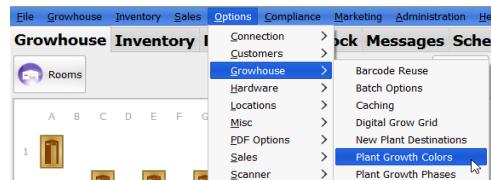


The system uses a hexadecimal color code to determine the color (and is previewed in the color bar seen above). As most (sane!) people don't have color codes memorized, you'll want to change the code by clicking on the Change Color button to display the color selector:

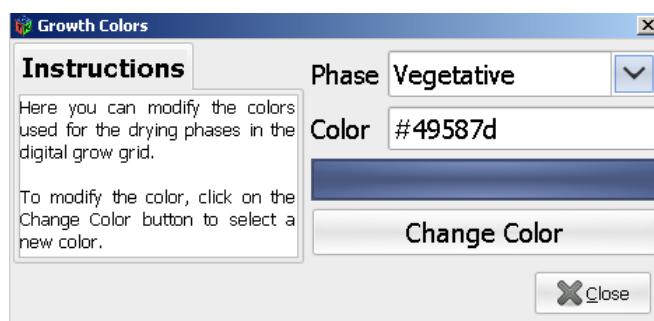


By moving the dial around, you can select different colors on the spectrum. You can then move the circle inside of the triangle to select different hues of the color. Or, you can select from common colors stored in the Palette. Once you've selected the color you like, click OK to save the new color. The newly saved color code will appear in the Color box and you may close the window if you are satisfied with the new color. Otherwise, click on the Change Color button to try again.

To change the Plant Growth colors, navigate to the Toolbar and click on Options, Growhouse, Plant Growth Colors:

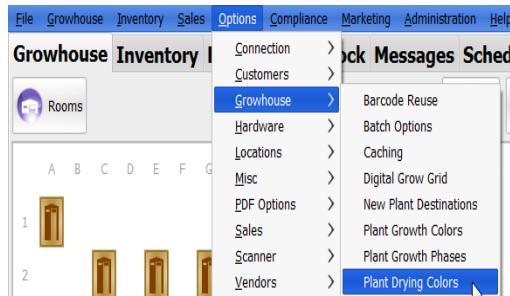


You'll notice the Growth Colors screen is very similar to the Room Colors screen:

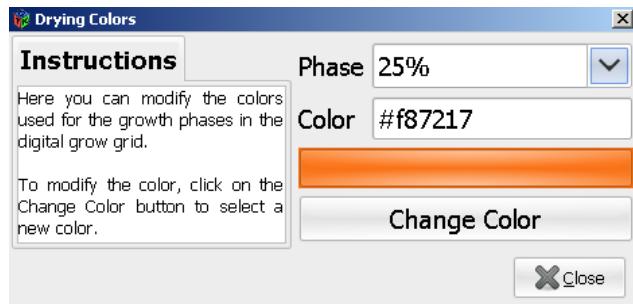


The main difference is that you can select a specific Phase from the Phase drop-down. In the example above, we have clicked on the Vegetative Phase. To modify the color, simply click on the Change Color button and you will once again be presented with the Color Selector, as seen above. Once you have found the right color, click OK. The new color will then display and take effect immediately. You may then select other Phases and change their colors, if you wish.

The final color change you can make relates to the Plant Drying Phases, and can be found by navigating to the Toolbar and clicking on Options, Growhouse, Plant Drying Colors:



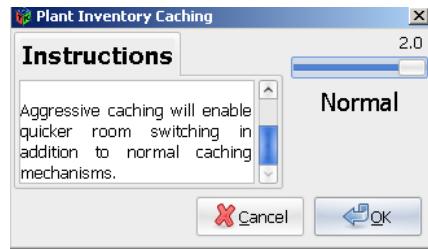
This will bring up the Plant Drying Colors screen:



Just like the Plant Growing Colors screen, you may select a specific percentage phase from the Phase drop-down and then click the Change Color button to modify the color of plants in that specific percentage phase of the drying process. Select the color you want to use from the Color Selector screen and then click OK to save the new color. You may then, once again, select different phases if you wish and modify them, as well.

Caching

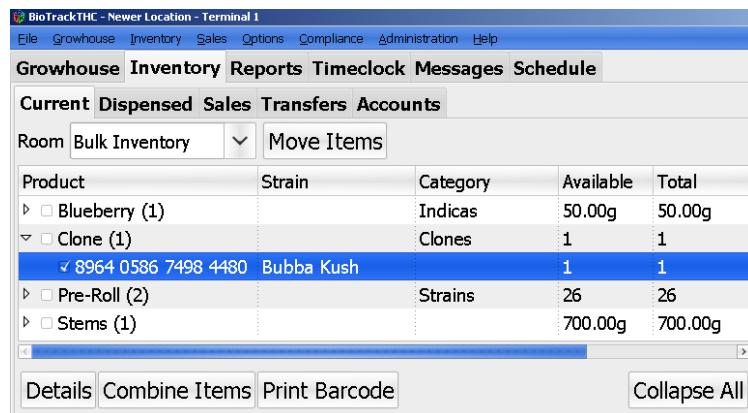
The growhouse system utilizes a set of caching features to make lookups and room switching much faster, no matter what your connection speed. It is turned on by default, but can be minimized or eliminated all together. Though there are relatively few cases where a user would want to turn off caching, the system offers the ability to do so. If a center has multiple terminals modifying the same exact plants at the same exact time, this would be such a case where a user would want the most up to the second data. The reason this is a relatively rare case is that the system refreshes data in the background at a set interval (15 seconds by default), so in every practical case the system is displaying the most up to date data. All of this being said, if a user wishes to minimize or disable the caching, they may navigate to the Toolbar and clicking on Growhouse, Caching. This will then bring up the Plant Caching screen:



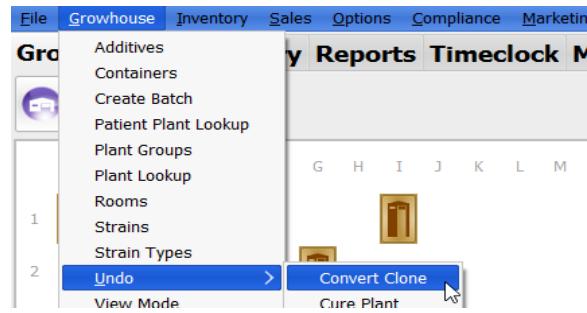
To change the setting, simply slide the bar either to the left. There are three settings: Normal (2), Minimal (1), and Disabled (0). Again, keeping the setting at Normal is highly recommended. However, Minimal can also be quite useful for simply speeding up general lookups without caching the more vital data. Disabled, of course, will cause the system to perform a full database lookup every time an action is taken. On a fast network connection this may still be fairly negligible. So, if you are experiencing caching issues, you may want to try toggling different states. Once you have selected the setting you wish to use, click OK to save the change. This setting is on a terminal by terminal basis, so such a change might need to be made on all terminals if you wish the setting to be the same across all terminals.

Un-transferring a Clone

Mistakes can sometimes happen. For example, if you accidentally transferred a plant to your inventory using the Transfer button, as described earlier, you can undo this action and return the plant back into your growhouse. To do so, navigate to the Inventory screen as shown below:



A full description of the Inventory screen and all of its uses will be thoroughly described in the [next chapter](#). For now, you'll simply want to know how to locate a plant that was transferred to your inventory as a Clone. As can be seen above, we have both located the clone and selected it by checking the box to the left. Once all of the clones you wish to un-convert have been selected, navigate to the Toolbar and click on Growhouse, Undo, Convert Clone as seen in the following screenshot:



Once you have clicked this, a confirmation box will appear:



After clicking Yes, you'll then find the plants in their original locations in the Growhouse.

Chapter

4

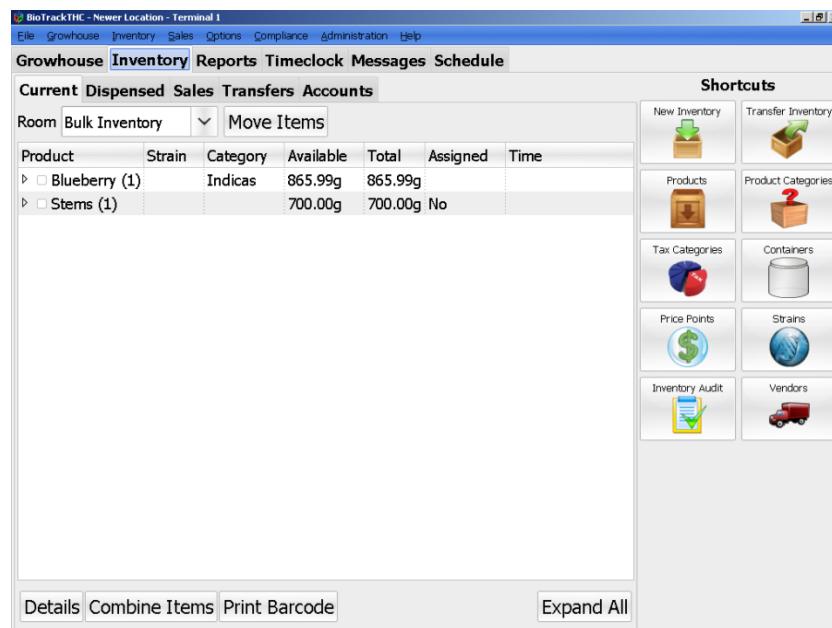
Chapter 4: Inventory

In this chapter, you'll learn how to:

- ✓ View and update your inventory
- ✓ Create new inventory
- ✓ Transfer and receive wholesale purchases and sales
- ✓ Create new products, categories and set prices
- ✓ Run inventory audits and much, much more!

Inventory Basics

The Inventory tab is useful for both Growhouse locations and Dispensary locations. For Growhouses, it contains any inventory that is curing and for Dispensaries it contains all of the product they have on hand. Because each location has its own data sets, the inventory a Growhouse sees will be different from the inventory a connected Dispensary sees. The inventory tab will look like the following:



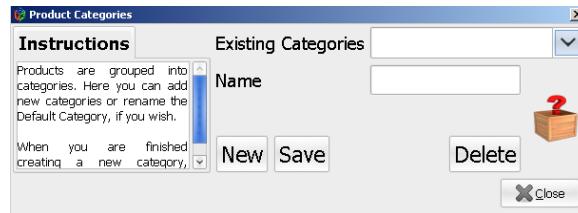
The Inventory tab has 5 sub-tabs. Current, Dispensed, Sales, Transfers and Accounts. In this chapter we will cover the Current, Transfers and Accounts sub-tabs; the Dispensed and Sales sub-tabs will be saved for a following chapter. Before we get into the nitty gritty of the Inventory system, it's first necessary to introduce you to some more basic system components as they relate to the Inventory system and the Sales system (which will receive more in-depth coverage next chapter).

Product Categories

Every product must be placed within a product category. To view and edit product categories, navigate to the Inventory tab and then click on the Product Categories button:



This will then bring up the Product Categories screen:



Creating a New Product Category

To create a new Product Category, first click on the New button. Next, type in a name for the new Product Category (e.g. Edibles). Once you have finished typing the name, click the Save button.

Modifying an Existing Product Category

To modify an Existing Product Category, click on the Existing Categories drop-down to select from all categories or click into the Existing Categories textbox and begin typing the category you are looking for. The system will popup any matches as you type; simply click on the correct one. This will then populate the Name textbox. You may now change the name. Once you have completed making your changes, click the Save button to save the new category name.

Deleting a Product Category

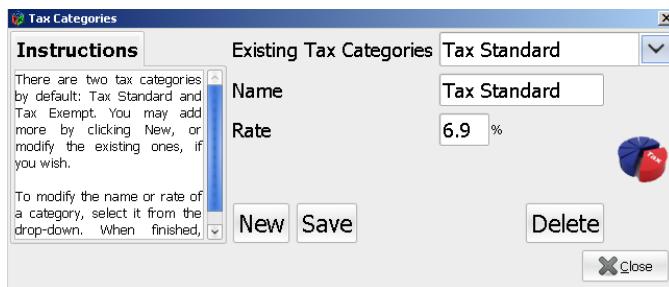
To delete a Product Category, select it from the Existing Categories drop-down. Then, click on the Delete button. The system will prompt for confirmation and, once confirmed, the Product Category will no longer be available.

Tax Categories

The system possesses the capability for you to define as many different tax categories as you like. By default, the system has two already defined: Tax Standard and Tax Exempt. These are used for both wholesale and retail transactions. Most centers will simply want to use these pre-defined categories and just change the percentage amounts that are associated with them. To start, navigate to the Inventory tab and click on the Tax Categories button:



Once clicked, the following screen will appear:



Modifying an Existing Tax Category

To modify an Existing Tax Category, select the category you wish to modify from the drop-down. In the example above, we are modifying the Tax Standard category. Most likely, you'll just want to change the rate to whatever your tax rate is in your locality. The default is 6.9, but you can change this to any decimal amount. You can, of course, change the name as well, but it's recommended to keep the default names. Click the Save button when you have set the correct tax rate.

Creating a new Tax Category

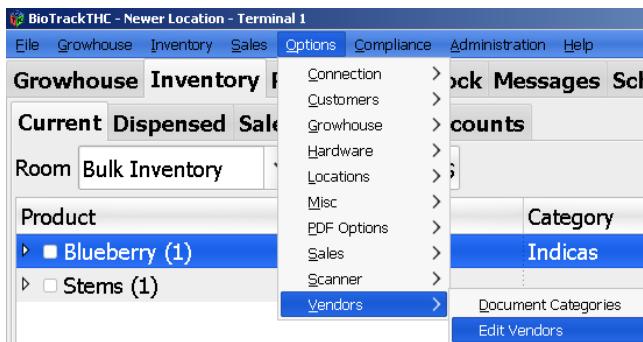
In most situations, you should not need to create additional tax categories. But, in the event that you do, you may do so by first clicking the New button. Next, type in a name for the Tax Category. Finally, type in a rate, for example, 7.45. Once you click the Save button the new tax category will be available.

Deleting a Tax Category

Again, in most situations, you should not need to delete a tax category. But, in the event that you do, you may do so by clicking on the category from the Existing Tax Categories drop-down. Once the correct category is selected, click on the Delete button to remove the tax category from the system.

Vendors

Vendors in the system are entities outside of your own locations that you can either wholesale to or make wholesale purchases from. You can also associate specific products with vendors to expedite the wholesale process when making new purchases. To begin, navigate to the Toolbar, then click on Options, Vendors, Edit Vendors:



Or simply click on the Vendors icon:



This will bring up the Vendors screen:

The 'Vendors' screen has two main sections. On the left, there is an 'Instructions' box containing text about creating a new vendor, followed by input fields for 'Name', 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'Phone', 'Fax', and 'License Number'. At the bottom are 'New', 'Save', and 'Delete' buttons. On the right, there is a 'Documents' section with 'Open', 'Scan', 'Scan ADF', 'Print', 'Export', 'Upload', and 'Clear' buttons. It includes a 'Files' list with 'New' and a 'Title:' input field, and a preview area with 'Zoom In', 'Pop-Out', 'Zoom Out', and a 'Close' button.

Creating a New Vendor

To create a new Vendor, click on the New button. The name field is the only mandatory field for a new vendor. The address, city, state, zip, phone, fax and license number are necessary for certain jurisdictions (e.g. Colorado) where the vendor may later be used for certain compliance procedures. Even if you are not required to keep this information in your jurisdiction, you may still wish to do so. Once you have entered the necessary data, click the Save button to save the new vendor.

Modifying an Existing Vendor

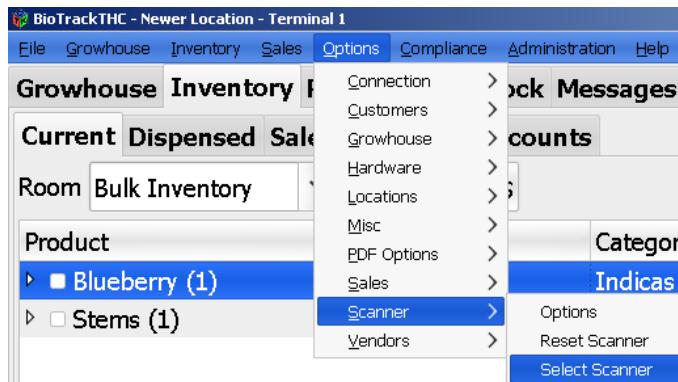
To modify an existing vendor, click on the Vendor from the Existing Vendors drop-down. Once selected, you may now change the Name, address, etc. When you have finished making any changes just click the Save button to update the system.

Deleting a Vendor

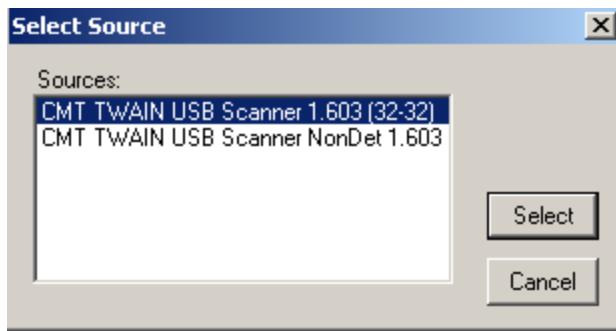
To delete a vendor, click on the Vendor from the Existing Vendors drop-down. Once you have selected the vendor you wish to delete, simply click the Delete button to remove the vendor from the system. Be aware, this will also delete any documents that have been scanned for a vendor, as well.

Vendor Document Scanning

You may have noticed the ability to upload documents within the Vendors popup. Document uploading does not require a scanner to be connected to the computer for use, but it does make things a whole lot easier. To begin, a user will first need to associate a TWAIN compliant scanner with BioTrackTHC. Most scanners produced today are TWAIN compliant, so there is little need to worry about compatibility.

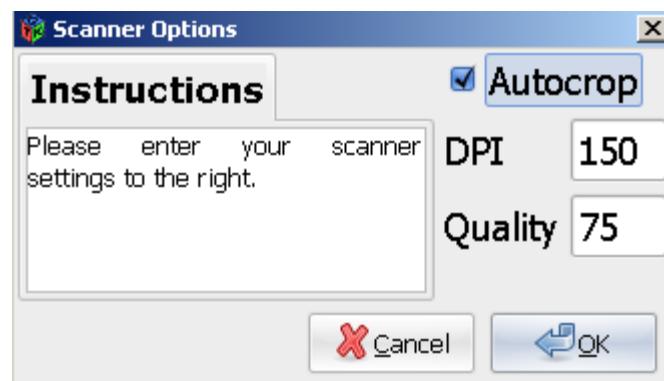


The first step in associating the scanner is to navigate to the Toolbar and click on Options, Scanner, Select Scanner.

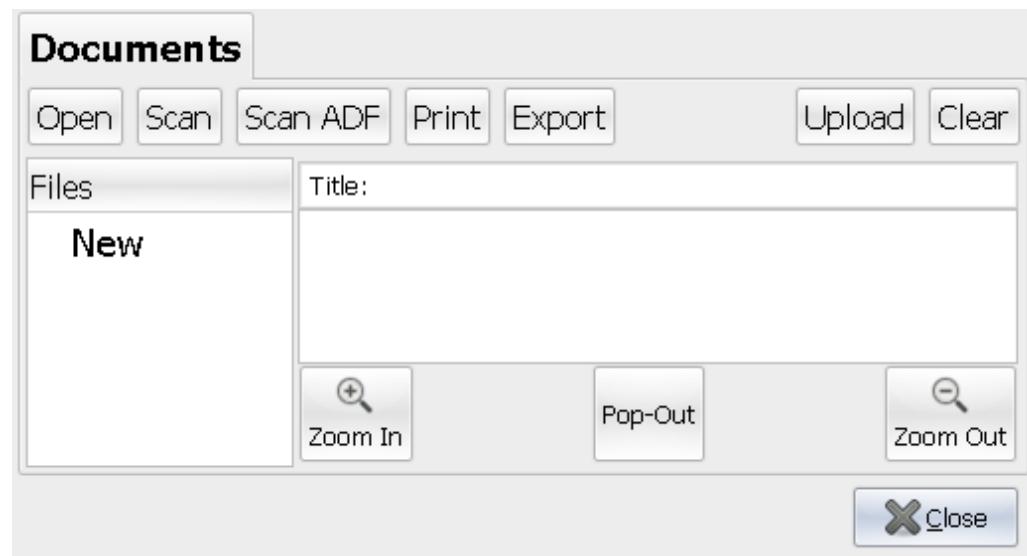


Most scanners will have two interfaces, but there may be more if multiple scanners or printers with scanning capabilities are connected. If two interfaces are shown above and one of them includes the word WIA that is the one you will want to select.

If for whatever reason there is an issue with the TWAIN interface, you can try to resolve it by navigating to the Toolbar and clicking on Options, Misc, Scanner, Reset Scanner.



By navigating the Toolbar and clicking on Options, Scanner, Options; scanning options including the DPI, quality and autocrop features can be configured. It is recommended to keep the default settings.



Initiating a scan

Once a scanner has been setup, initiating a scan is as easy as clicking on the Scan button. The system will then initiate the TWAIN system and populate the scan area with the image. If your scanner supports Automatic Document Feeder with a document feeder, you may click on Scan ADF to scan multiple documents at once.

By default, scanned documents will be given generic names. A user can change the name of a document by clicking into the Title entry box, making the necessary changes, and hitting the Enter key.

Once all of the images have been scanned, a user must click on the Upload button to upload the documents into the system. If a user does not wish to upload the documents, they may click on the Clear button and it will not upload them.

Upon upload of a file, a user may highlight the document to display it. Once displayed, a user may also use the Print button to print a copy out. Also, if at any point the document is no longer needed a user may right click on a document and click on the Delete option.

After an image has been uploaded, a user may also use the Zoom In and Zoom Out image features which allow a user to enhance the image into greater detail.

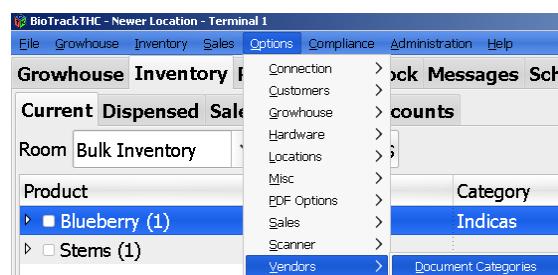
The Pop-Out button will maximize the document tab onto the screen for maximum viewing size of uploaded documents. Once maximized, a user only needs to click on Pop-Out again to restore the document tab to its original place and size.

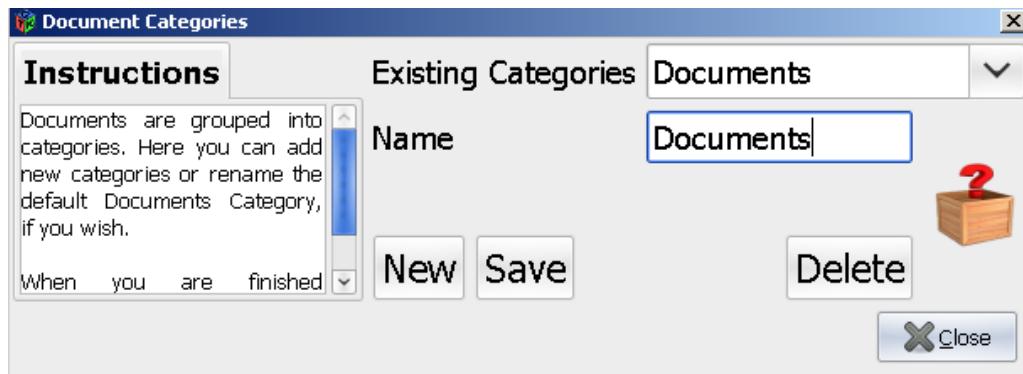
Non-scanned documents

Documents that already exist on the computer, or that were acquired through another method, can also be uploaded by clicking on the Open button. This will prompt the user to select the file from local filesystem. Once selected, it will appear in the scan area.

Vendor Document Categories

Documents are organized into categories and the available document categories will appear as tabs in the document scanning window. By default, one category will exist named Documents. The name of this category can be modified and other categories added by navigating to the Toolbar and clicking on Options, Vendors, Document Categories.





Create new vendor document category

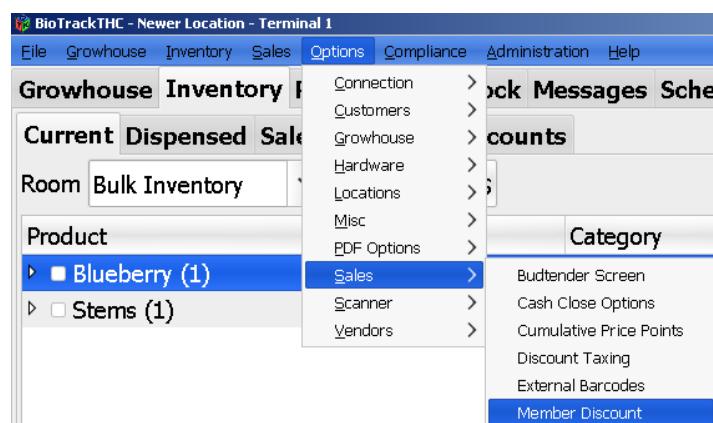
To create a new document category, first click on New. This will clear out the selected document category and move the cursor to the Name entry box. Now, simply type in the name of the new vendor document category. Once you have finished, click Save. The category has now been saved and once the system is restarted the new category will appear in the document scanning area.

Update existing vendor document category

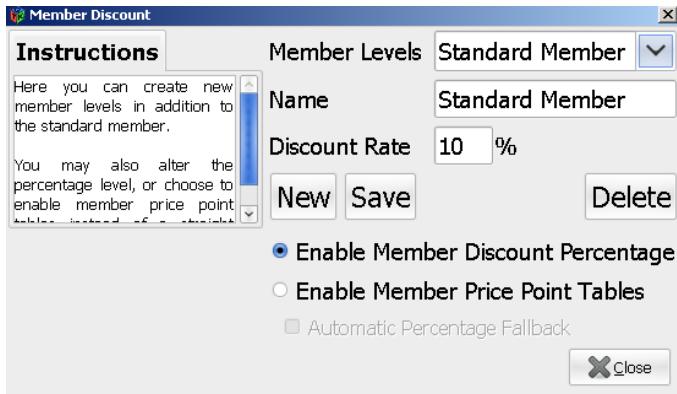
To update an existing vendor document category, click on the down arrow to the right of the Existing Categories drop-down. This will display a list of existing categories. Once you have selected a category, its name will appear in the Name entry box. You may now modify the text in the Name entry box and, once satisfied, click Save. Once a category has been selected, you may also delete it by clicking on the Delete button. Deleting a category will make any documents already uploaded into said category inaccessible, so please be sure to use caution when deleting a vendor document category.

Member Discount

The Member Discount can be configured to allow a center multiple ways to define how members receive discounts, if at all. To customize the Member Discount, navigate to the Toolbar and click on Options, Sales, Member Discount:



Once clicked, the Member Discount options will appear:



The system uses Member Levels to allow you to define either percentage discounts or different pricing tiers for customers assigned to the member level.

You'll also see two radiobutton choices: Enable Member Discount Percentage and Enable Member Price Point Tables. The Percentage is the system default and, if a customer has been set to the specified Member Level, will automatically discount a percentage off of an eligible product. The Tables, on the other hand, will allow you to setup additional tiers per product. Every product must have a Non-Member price point table (discussed next); selecting Enable Member Price Point Tables will allow additional tables to be created. For example, if a non-member purchases an item at 1 for \$13, but a member only pays \$10, you'll probably want to enable the member discount this way.

The Automatic Percentage Fallback can only be activated if you decide to use Member Price Point Tables. This allows your system to fallback to a percentage discount on an eligible product if and only if a separate member price point table has not been defined on a product. This allows a hybrid system of sorts if you offer discount percentages on some items (e.g. Edibles), but offer different tiers for others (e.g. Bud).

Your choice between using Tables or a Percentage will be saved once you click the Close button.

To modify an existing member level, simply click on the Member Levels drop-down and select the member level you wish to modify. You can change the Name, or modify the Discount Rate %. Once you have made your modifications, you may click the Save button to save the changes.

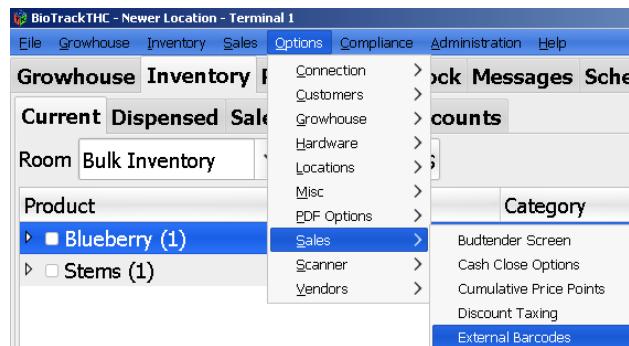
To delete a member level, click on the Member Levels drop-down and select the member level you wish to delete. Then click the Delete button to remove the member level from the system.

You may also add new member levels, if you wish. To create a new Member Level, first click the New button. Next, enter a name or the new member level, for example,

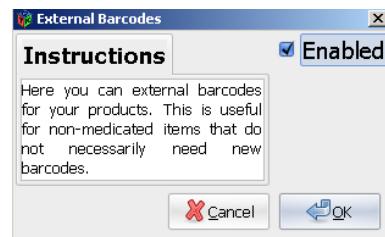
you could name the level VIP. Now, enter a discount rate for the member level. If you plan on using Price Point Tables, you can simply enter 0. Click the Save button to save the new Member Level.

External Barcodes

The final configuration step before we touch on Products is the concept of External Barcodes. If your center sells many non-medicated items or other such products that already have a UPC barcode attached, you can enable the system to recognize these instead of printing out new ones. To enable or disable, navigate to the Toolbar and click on Options, Sales, External Barcodes.



The External Barcodes screen is fairly straightforward:



Simply check or uncheck the Enabled box and click OK to save the setting. Once this option is modified, you'll need to reconnect for the changes to take effect.

Products

The Products setup can be found on both the Inventory and Customers tabs by looking for the Products button:



The actual Products screen will look like the following:

Instructions

Here you can add a new product. If applicable, please select the strain. Then enter a name for the product. If you wish to change the category or the tax category, you may also do so at this time. Additionally, you may add an icon or keep the default.

If this item will be eligible for a member discount, please check the box to the right.

To add a price to this inventory item, please add an entry to the price point table. The price point table allows you to automatically adjust the price on a sliding scale or apply it only at fixed price point. To add a price, simply click Add and follow the prompts.

Existing Products Blueberry

Strain Blueberry

Type Bud

Name Blueberry

Category Indicas

Tax Category Tax Standard

Icon Preview (Icon of a download arrow)

Filename Default

Vendor My Wellness Centre

Cost Per Unit 5.00

External Barcode 3863 5850 9493

Options Description

- Requires Inventory Medicated
- Requires Weighing
- Member Discount

Price Point Table

Level	Non-Member
Amount	Price
1.00 g	\$10

Buttons

- Add
- Modify
- Remove
- Generate
- Print
- New
- Save
- Delete
- Close

Creating a New Product

To begin, first click the New button. This will clear all of the existing fields and allow you to begin creating your new product.

The Strain drop-down will allow you to select the Strain, if applicable, of the product. If the product you are creating does not have a Strain, you may leave this field blank. Selecting a Strain will automatically populate the Name field with the same name.

The Type field helps the system automatically associate products when they are transferred in from the Growhouse. The types available are: Bud, Clone, Kief and Shake. This field is optional, but setting it, if applicable, is advised.

The Name field is the name that will be displayed for the Product. If you selected a Strain, the Name field will be automatically populated with the Strain name. However, you can change this to anything you wish.

The Category field determines, of course, under what category on the sales screen the product appears in. Before saving a product, it MUST be associated with a category.

The Tax Category determines how much tax will be charged will sales are made for this product. By default, you can choose from the Tax Exempt and Tax Standard categories. Most products will most likely be set to Tax Standard.

The Browse button allows you to locate on your computer an image icon which can be used to display an image of the product on the sales screen for easy product identification for the salesclerk. Once selected, the Icon Preview will display what the image will look like. Clicking on the Clear button will clear the icon. You do not need to associate an icon if you do not wish to.

The Vendor drop-down allows you to associate a specific product with a vendor. If you only obtain this product from one specific vendor, this can save you time when performing wholesale purchases. If you do not, or don't wish to associate the product at this time, you can leave this field blank.

The Cost Per Unit field is optional, but can be very useful when running reports. By default, the system will calculate costs as determined when wholesale purchases are made based on the number of items purchased and the total cost when purchased. However, if the Cost Per Unit field has been set on a Product, this will override any calculated costs and set them statically, to the number you enter here. Entering this field is generally a good idea if the cost of a product is mostly the same every time. If you have an estimated cost on certain items (e.g. Bud), this can also be useful in determining ROI. If you don't know the cost, or don't want to enter it now, simply leave this field blank.

The External Barcode field will only appear if you have enabled [External Barcodes](#). If you have, the system will allow you to click into this field and then scan the UPC of the item. Alternatively, the system can also generate a product barcode for you by simply clicking the Generate button. Clicking the Print button will then print out a barcode for the newly generated code. An inventory barcode tracks only to a single batch. If you choose to print a Product barcode (or already have an existing UPC), the system will use that to look for any batches that are available and prompt for which batch is being drawn from, if there are more than one available. In other words, unless you do already have a UPC on the product, you'll probably want to stick to using the Inventory barcodes.

The Options tab contains four options: Requires Inventory, Requires Weighing, Medicated and Member Discount. Setting or unsetting these is very important and affect how the system deals with each product.

The Requires Inventory checkbox determines whether the product requires inventory to be sold. For example, various strains of Bud would require inventory. However, a massage therapy session would not. If an item has been set as not requiring inventory, it will allow unlimited sales of an item and will not attempt to withdraw from inventory.

The Requires Weighing checkbox determines whether, for sales purposes, the system shows the weighing screen or whether it simply prompts for a quantity. You'll want to uncheck the Requires Weighing checkbox for items such as edibles or non-medicated items.

The Medicated checkbox tells the system whether or not the product contains marijuana that should be counted against a customer's purchase limit. If unchecked, the product page will also allow you to enter a Usable amount, or how much medication is in each unit. For example, an edible might contain 100 mg, or 0.1 grams.

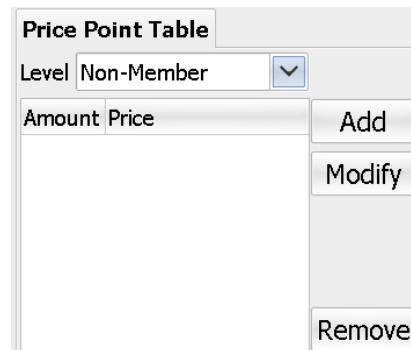


The Member Discount checkbox will allow you to include (by default) or exclude a product from the member discount. For example, if two customers, one member and one non-member, both purchase the same product that has Member Discount unchecked, they would both be purchasing it at the non-member price.

The Description tab is optional and allows you to add a general description for the product.



The Price Point Table allows you to create pricing tiers for your products. Let's walk through an example of how to set one up. We'll start with a blank table:



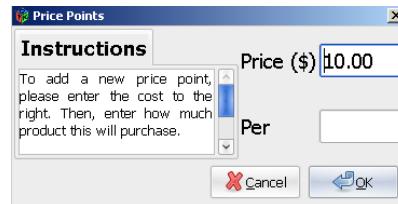
Now, click the Add button:



The system is now prompting for a price and a quantity. First, let's click into the Price (\$) field. That will bring up the following popup:



Now, either type in an amount or click on the numeric pad. Let's put in 10.00 and hit the OK button.



Now, click into the Per textbox. This is the number or quantity of the product that can be bought for the \$10.00 we entered.



Because the product we are configuring is weighable, we can enter a weight. If the product were not weighable, we would see the same type of popup without the weight choices. In any case, let's go ahead and simply leave it in Gram Mode and enter 1.

Now that we've entered our weight of 1, click OK and our screen will now look like the following:



Once we click OK, our price point table now looks like:

Price Point Table	
Amount	Price
1.00 g	\$10.00

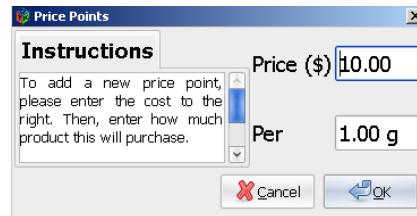
So we are selling 1 gram for \$10. Let's say we want to add another price point, for example, 3.5 grams for \$30. So click the Add button again. This time, for the price, we'll enter 30. For the weight, let's enter 3.5. Now, our price point table will look like:

Price Point Table	
Amount	Price
1.00 g	\$10.00
3.50 g	\$30

By creating a price point table, you can tell the system to offer the customer price breaks, the more they purchase. To finish the example, we'll add a few more:

Price Point Table	
Amount	Price
1.00 g	\$10.00
3.50 g	\$30
7.00 g	\$50
14.00 g	\$90
28.00 g	\$170

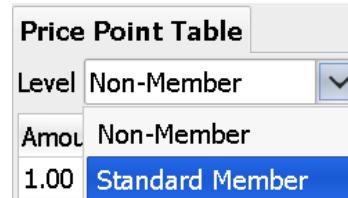
As you can see, there is no limit to the number of price points you may add. To change a price point you have already added, simply highlight the price point and click the Modify button. The system will re-populate the settings, for example, if we choose to modify the 1 gram price:



You can also remove a price point by highlighting it and clicking on the Remove button.

If your system uses a Percentage based member discount, it will automatically discount based on this table. For example, if your member discount is 10%, a member would automatically get 1 gram for \$9, 3.5 grams for \$27, etc. and so on.

If, however, your system uses separate member price point tables, you can configure those now, as well. For example, if we click on the Level drop-down:



By clicking on the Standard Member, the table will now be blank. But don't worry, by clicking back to Non-Member you'll see the price point table we just created. The system can keep separate sets of tables for each member level. Now, once we have selected the Standard Member level, we can simply repeat the process and add another price point table that is specific to members. Here's one we have put together for this example:

Price Point Table	
Level	Standard Member
Amount	Price
1.00 g	\$8
4.00 g	\$30
8.00 g	\$50
16.00 g	\$90
30.00 g	\$170

As you can see, it does not need to fall on the same amount or on the same price scheme. You will see this price point system actually in action in the next chapter. For now, it's enough to know how to assemble these tables.

It's worth noting, by the way, that a price point table for a non-medicated or edible like product can be as simple as one price point, for example, 1 for \$5.

If doing this for each and every product sounds tedious, you can relax because there is a shortcut method to set default tables per category that will be explained later in the chapter. Also, if you are a Growhouse location, keep in mind you can create a product without saving a price to it. However, you will, obviously, not be able to make any sales from that product until a price is added.

In any case, once you have entered all of the necessary fields, click the Save button to save the new product.

Modifying an Existing Product

The Existing Products drop-down will contain all of your existing products, selecting one will populate all of the product fields with that product's saved information. At that point, you can modify any and all information you need to including price point table information. When you have made your changes, simply click the Save button to save the information.

Deleting a Product

Select the product you wish to delete from the Existing Products drop-down. Once selected, click on the Delete button. The system will then prompt for confirmation and, once confirmed, the product will be deleted.

Current Inventory

Now that you have an understanding of many of the components relevant to both the Inventory system and, later, to the sales system, let's delve into the heart of the Inventory tab. The Current Inventory will display all of the inventory that is currently available for a location. If this is a Growhouse location, this will most likely be any Bud that is drying, Stems that have been collected for wholesale, etc. For a Dispensary location, this will be any products waiting to be sold including Bud, edibles, non-medicated items, etc.

The columns in the Current Inventory include: Product, Strain, Category, Available, Total, Assigned and Time. By clicking on the Expand All button in the bottom right hand corner, we can also see slightly more information about our inventory:

Current Dispensed Sales Transfers Accounts						
Room	Bulk Inventory	▼	Move Items			
uct	Strain	Category	Available	Total	Assigned	Time
Blueberry (1)		Indicas	865.99g	865.99g		
<input type="checkbox"/> 7840 4381 9856 1898	Blueberry		865.99g	865.99g		0 day
Stems (1)			700.00g	700.00g	No	
<input type="checkbox"/> 1972 8161 1238 6844	Blueberry		700.00g	700.00g	No	249 d

[Details](#) [Combine Items](#) [Print Barcode](#) [Collapse All](#)

As you can see, the number in parenthesis next to each product lists how many available batches there are; in this case each of our items only possesses one batch. They are denoted by the unique 16 digit barcode numbers.

The available and total amounts will always match unless you create Inventory Rooms, as discussed later in the chapter. The Assigned column will tell you whether or not the Inventory item has been assigned to a product. On a Growhouse inventory location, many times this will be denoted by the No value and is actually of no relevance to a Growhouse. For a Dispensary, however, this will tell a sales clerk whether the inventory is actually available for sale. In other words, an inventory item cannot be sold unless it is associated with a Product. Products will be covered later in the chapter, but for now it's only necessary to know that that the available values for the Assigned column are: Partially and No; anything that is blank means that it is, in fact, assigned. When you have not clicked the Expand All button, the batches are folded into groups. If the Assigned column reads No it means the batches are not assigned whereas if it reads Partially it means that only some of the inventory items are not assigned.

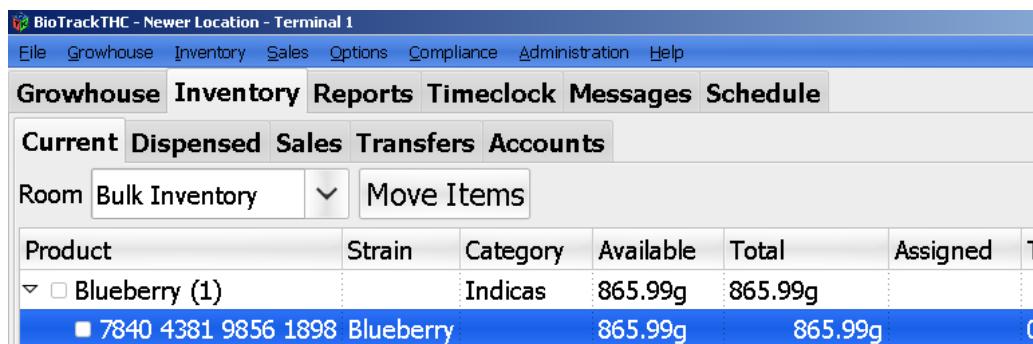
The Time column will tell the user how long the inventory item has been in the Current Inventory.

Clicking on a column will sort the Current Inventory by that column. So, one could choose to sort the inventory by Product, Category, etc.

Checking off individual items and clicking on the Print Barcode button will re-print the selected barcodes.

Inventory Details

Once an item is in your Current Inventory, you can now lookup the details on that specific item. You may do this one of a number of ways. The first is to simply scan the barcode of the item while on the Inventory tab. The second way is to highlight the inventory item, as shown below and either double click on the item or click on Details after highlighting the item:



Product	Strain	Category	Available	Total	Assigned
Blueberry (1)	Indicas	865.99g	865.99g		0
7840 4381 9856 1898 Blueberry		865.99g	865.99g		0

The third way to lookup an inventory item is to navigate to the Toolbar, then click on Inventory, Inventory Lookup:



Once the Inventory lookup appears, simply type in the barcode as shown above. The Inventory Details screen will no popup as seen in the following screenshot:

The screenshot shows the 'Inventory Details' window. At the top, there's a header bar with tabs for 'Inventory Details', 'Strain', 'Notes', 'Custody', 'Sales History', and 'Plants'. The 'Notes' tab is active. Below the header, there are several input fields and dropdowns:

- Barcode:** 7840 4381 9856 1898
- Product:** Blueberry
- Type:** Bud
- Strain:** Blueberry
- Available:** 30.547 oz (865.99 g)
- Total:** 30.547 oz (865.99 g)
- Cost:** (empty field)

Below these fields are several buttons: Print, Adjust, Convert, Transfer, and a large 'Notes' section.

Notes Section:

Date	Phase	User	Subject
08/16/2011	Vegetative	postgres	This is the a group...
09/09/2011	Vegetative	postgres	Group note
09/21/2011	Vegetative	postgres	These plants need...

Below the notes table is a text area containing the message: "These plants need more nutrients". At the bottom of the window are buttons for New, Save, Cancel, and OK.

The Barcode field lists, of course, the current barcode of the inventory item.

The Type can be any one of the Types previously discussed in Chapter 3 that were available to collect, including: Bud, Clone, Fan Leaf, Kief, Other, Shake, Stems, Sugar Leaf Trim and Vegetation Trim. For the most part, the user does not need to modify this field. The system will input this automatically. For example, when a batch of Stems is collected on the growhouse, the new inventory item is automatically typed as Stems. Or, when a plant is transferred into inventory as a clone, it is set as the Clone type. The reason for this is very simple; as will be discussed later in the chapter, once you create products in the system, it will automatically attempt to match newly added inventory to an existing product. So let's say, for example, you have two products for sale. One is a Blueberry Clone and the other is Blueberry Bud. So, when a batch of bud is collected with the strain type Blueberry, the system will automatically know which product to assign it to.

The Strain drop-down lists the Strain of the inventory item, if and only if it does in fact have a strain. Some items, such as edibles or non-medicated items will have this field blank. Other items, depending on how they were created, may list in this field the actual product name. This serves as a sort-of backup in case the product is accidentally assigned incorrectly.

The Available and Total fields will list in both ounces and grams the amount of the item remaining. If the item is non-weighable (e.g. edibles or joints), it will simply list the quantity remaining.

The Product drop-down is where the inventory item can be assigned to a Product. If the Product field is blank, you can simply assign it to a Product by either clicking on the drop-down to display all products or you may also begin typing the name of the product you are looking for and the system will list any matches.

The checkboxes “This item is medicated” and “This item requires weighing” determine how the system views and displays the inventory item. Most of the time the system will handle this for you when the inventory is created; but you can always change them here. If the item is medicated, the system will count its sale against certain limits. If the item requires weighing, the system will allow you to use the integrated scale whereas if it doesn’t the system will simply prompt for a quantity. Here is an example of an item that is medicated, but not weighable:

The screenshot shows the 'Inventory Details' window with the following data:

Barcode	3083 7582 7747 0556	Product	Pre-Roll
Type	Shake	<input checked="" type="checkbox"/> This item is medicated	
Strain	Pre-Roll	<input type="checkbox"/> This item requires weighing	
Available	10	Usable	1.00 g
Total	10	Cost	

The 'Instructions' tab contains notes about the item being a Shake Pre-Roll.

In such a case, you'll also notice an additional field named Usable. This field records the amount of usable product per unit. In the example above, each Pre-Roll item contains 1 gram of shake. This can be configured manually when creating products or the system can calculate it for you when converting inventory, which is covered later in the chapter.

The Cost field is the original amount the item in whole was purchased for. This value will be entered automatically when a wholesale purchase occurs and assists the system when calculating costs in the reporting system. Most of the time, you will not want to modify this value from the value given to it by the system.

The Print button will print out the barcode of the selected inventory item.

The Notes tab allows you to record notes on this specific inventory item. You'll notice in the first example, there were plants notes already populated. This is because the seed to sale tracking maintains the notes from the original plant(s); even though the inventory has a new barcode. It will differentiate between notes that were created while the inventory was still a plant and new notes since it was considered inventory.

The following screenshot demonstrates a new note being added:

Notes	Strain Notes	Custody	Sales History	Plants
Date	Phase	User	Subject	
08/16/2011	Vegetative	postgres	This is the a group...	
09/09/2011	Vegetative	postgres	Group note	
09/21/2011	Vegetative	postgres	These plants need...	
07/07/2012	Inventory	postgres	Inventory note	
Inventory note				
New		Save		

As was described in Chapter 3, to add a new note simply click the New button, type your note and then click Save. You can update any notes created during Inventory; but any notes that exist from when the item was a plant cannot be changed. For non-medicated items or items that did not come from a plant will not have any previous notes attached to them.

The Strain Notes have been previously described in Chapter 3, but for a refresher, the screen looks like this:

Notes	Strain Notes	Custody	Sales History	Plants
Topic	Topic: Ailments			
Ailments	Good for what ails ya! :)			
Cycle				
	New	Save	Delete	

The Custody tab will show you the entire chain of custody on the inventory item detailing who handled the inventory every time it moved, when and what it weighed:

Notes	Strain Notes	Custody	Sales History	Plants
Company	User	Stage	Weight	Date
My Dispensary	postgres	Inventory	865.99g	07/05/2012 11:37 PM
My Dispensary	postgres	Inventory	865.99g	07/06/2012 10:35 PM
My Dispensary	postgres	Inventory	865.99g	07/06/2012 10:37 PM

The Sales History tab will detail any and all people who have purchased from this specific inventory item:

Notes	Strain	Notes	Custody	Sales History	Plants
Customer				Quantity Sold By Date	
Foobar9	Foobar9	12 1.00 g	postgres	10/31/2011 5:22 PM	
Foobar9	Foobar9	12 1.00 g	postgres	10/31/2011 5:22 PM	
Foobar9	Foobar9	12 1.50 g	postgres	11/28/2011 4:34 PM	
Foobar9	Foobar9	12 3.00 g	postgres	11/28/2011 4:34 PM	
B A		12 5.00 g	postgres	12/01/2011 3:44 AM	
B A		12 2.00 g	Administrator	12/01/2011 3:45 AM	
Foobar9	Foobar9	12 2.00 g	Administrator	12/03/2011 10:08 PM	
Foobar9	Foobar9	12 5.00 g	Administrator	12/16/2011 11:32 PM	
P A		12 2.00 g	postgres	12/18/2011 12:27 AM	

This can be useful in a number of ways. For example, if a specific customer informs you that their previous purchase was the best they've ever had, you could then track it back to the specific batch and check the notes, all the way back to the plant, to see if your growers used a different nutrient cycle, water cycle, etc.

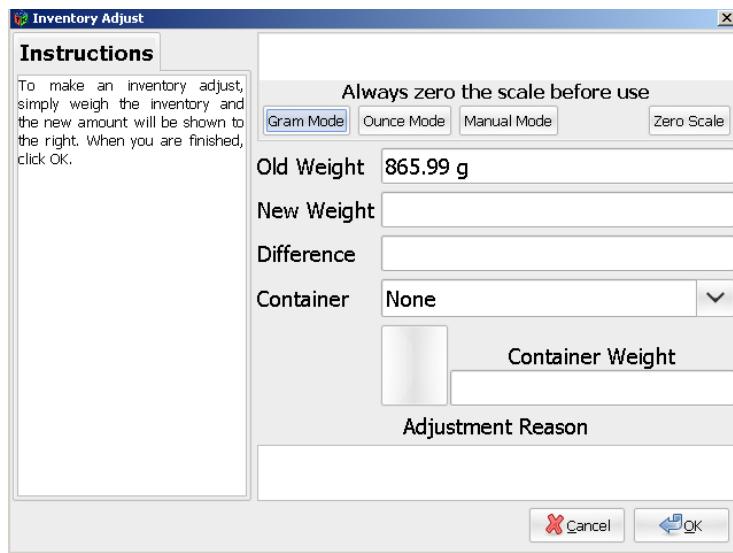
The Plants tab will detail any and all plants that the item was created from, if it was derived from plant(s) within the system. It will then also display what MMJ Card numbers those resulting plants were associated with:

Notes	Strain	Notes	Custody	Sales History	Plants
	Strain	ID		Patient	
	Blueberry	1262 0880 5614 2862		MMR25	
	Blueberry	1530 8745 8325 5739	35		
	Blueberry	1314 6519 3827 5855		MMR123456	
	Blueberry	1418 2796 7270 9022		MMR3	
	Blueberry	0425 0453 7274 5204		MMR7	

Inventory Adjust

You'll notice on the Inventory Details pop-up a button that reads Adjust. This allows you to adjust an inventory item's quantity on an item by item basis. In general, most of the time you'll set your inventory right through the Inventory Audit process (covered later in the chapter). There are, however, times where you may need to make a one-off correction.

Once the Adjust button has been clicked, you'll see the following popup:



Using the integrated scale, simply weigh the item and the weight will appear in the New Weight textbox. In addition, the system will display what the difference is. Or, in Manual Mode, click into the New Weight textbox and enter in the new weight.

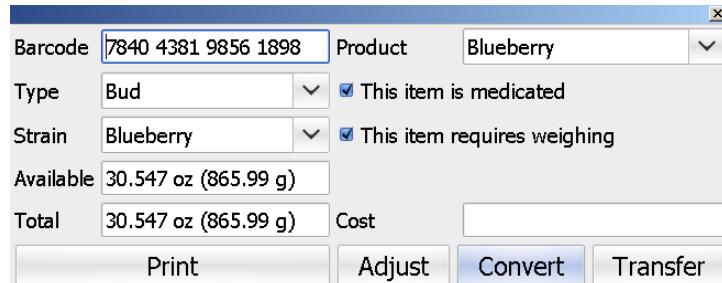


Next, enter a reason for the adjustment. Finally, click the OK button to make the adjustment. If your system requires authorization, it will prompt for that now. Otherwise, the adjustment will be made and a database record will be created of the adjustment.

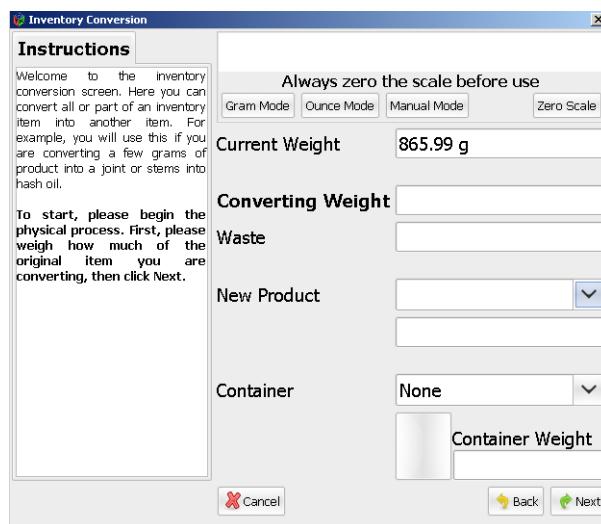
Inventory Conversion

You can use the system to convert one type of an item to another. For example, if you are converting a batch of Stems to hash oil, you can do so through the system. Or, if you are converting Bud to pre-rolled joints, you can also do that within the system.

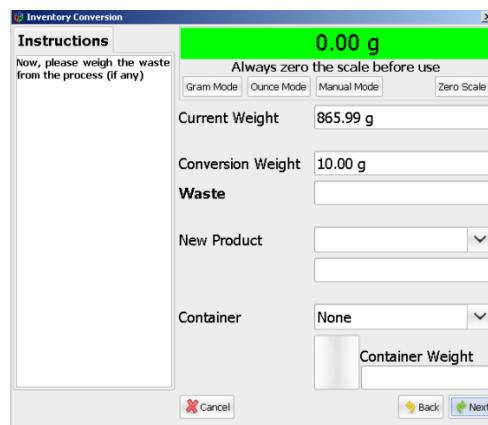
This allows you to have a bona-fide audit trail of what went where and maintain seed to sale tracking, even through derivatives such as hash oil. As an example, let's do an easy Bud to Pre-Roll conversion. We'll start with our Blueberry:



First, we'll click on the Convert button:

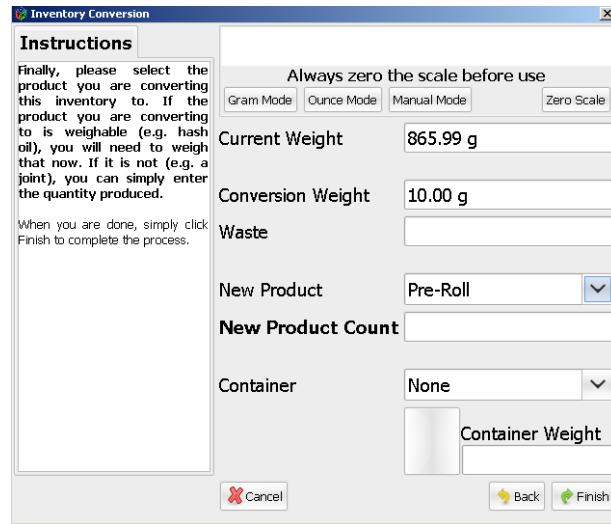


Next, we'll enter in the conversion weight. This can be done by either placing on your integrated scale the amount of product you wish to convert or, using the Manual Mode, click into the Converting Weight textbox and enter the weight you are converting. In this case, let's convert 10 grams.

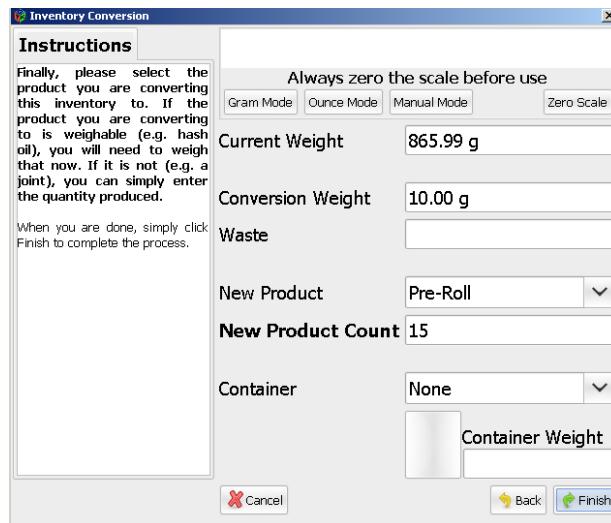


Now that we've entered 10 grams, click the Next button. Since there is no waste during this particular conversion process, we'll simply enter 0 for the Waste and click Next.

It's now time to select the product from the New Product drop-down. In this case, we're going to select our Pre-Roll product:



Because we are converting the 10 grams to a non-weighable product the system now asks us to enter a count, or quantity of the new product that were created from the process. In this case, we'll click into the Count box and enter that 15 were created.



Finally, click Finish to complete the process. The system will now deduct 10 grams from the original product and create a new barcode in the process for our new inventory; in this case the Pre-Roll product. At this point, the system will prompt you as to whether or not you would like to print the new barcode:

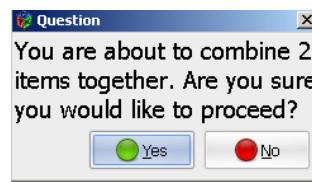


Because the system knows that 10 grams of product was used to create 15 of our pre-roll product, the system will automatically set a usable amount equal to 0.67 grams per item.

Combining Inventory

There may come a time when you want to combine many barcodes into one. This is not a practice that is recommended, but, there is a way to accomplish the task. Simply check off the items you wish to combine on the Current Inventory screen and click on the Combine Items button:

Once clicked, the system will prompt for confirmation:



Once combined, the new inventory will have a new barcode. This ensures that, even if multiple items are combined, the seed to sale tracking is still maintained through to the new item.

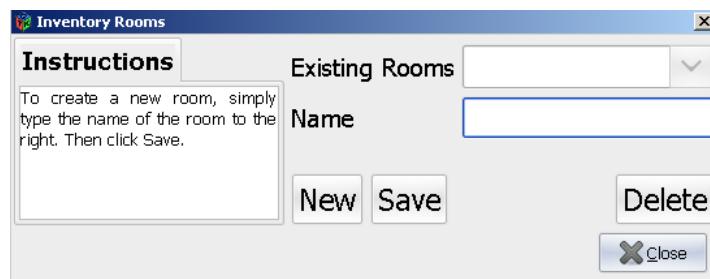
Inventory Rooms

Similar to the Growhouse, you can setup Rooms for your Inventory, as well. This can be useful in instances where you have separate inventory for each salesclerk. Or, if you have an on-site safe where you store bulk inventory, you could setup such a room to swap inventory in and out of. In other words, you can assign a

terminal to a specific inventory room (as discussed later) and that salesclerk can only sell out of the available amount allotted to their terminal. Also, if they run an inventory audit, the system will only expect them to have the amount(s) they have been allotted, rather than everything that is on-hand in the entire store. The system starts with one main inventory room named Bulk Inventory and you can create more from there. To do so, navigate to the Toolbar and click on Inventory, Rooms:



That will bring up the Inventory Rooms screen:



Creating a New Inventory Room

To create a new Inventory Room, first click on the New button. Next, type in a name for the new room. For our example, we are going to use the name Station 1. Finally, click the Save button.

Modifying an Existing Inventory Room

Simply click on the Existing Rooms drop-down and select the room you would like to change the name of. Once you have made the necessary changes, click Save to finalize them.

Deleting an Inventory Room

Click on the Existing Rooms drop-down and select the room you would like to delete. Once it has been activated, simply click the Delete button to remove it from the system. Any outstanding inventory in the room will be moved into the Bulk Inventory.

Creating New Inventory

New inventory can be created when either making a wholesale purchase or when importing already existing inventory when first setting up your system. This function is not necessary when importing inventory that you yourself have produced from your growhouse, which will be covered shortly under

the Transferring Inventory heading. So, to begin, let's click on the New Inventory button:



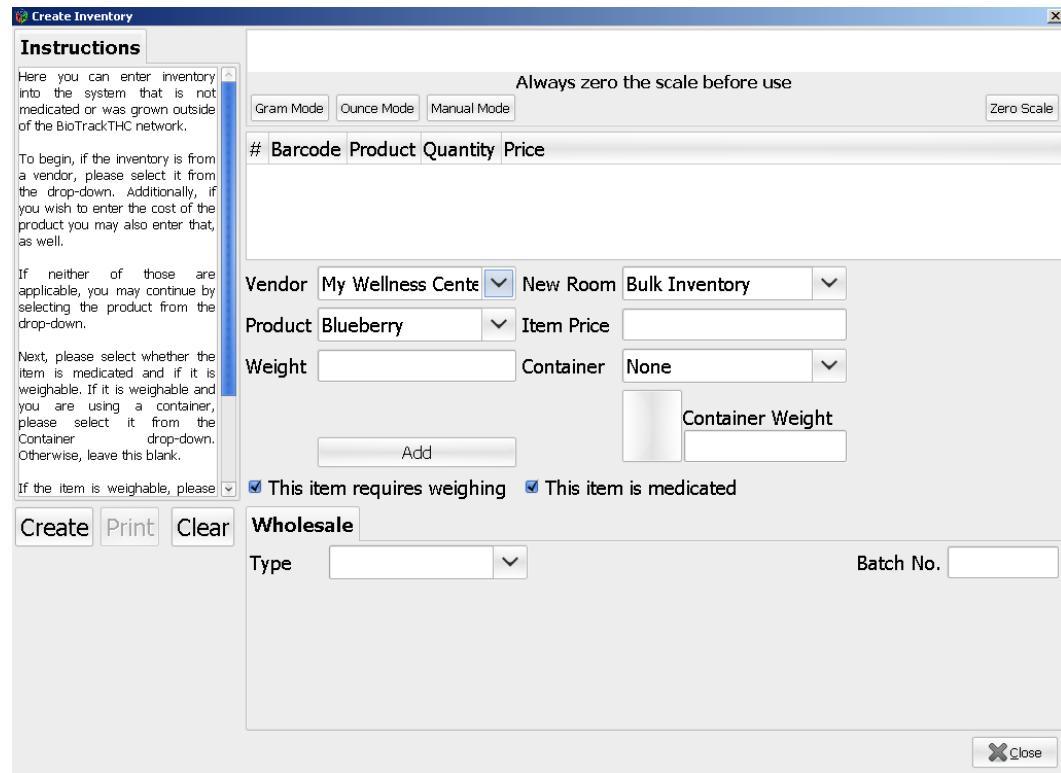
Which will present the Create Inventory screen:

The first thing we'll need to do is select the Product from the drop-down that we want to add to inventory. In the following example, we will first select the Blueberry product.

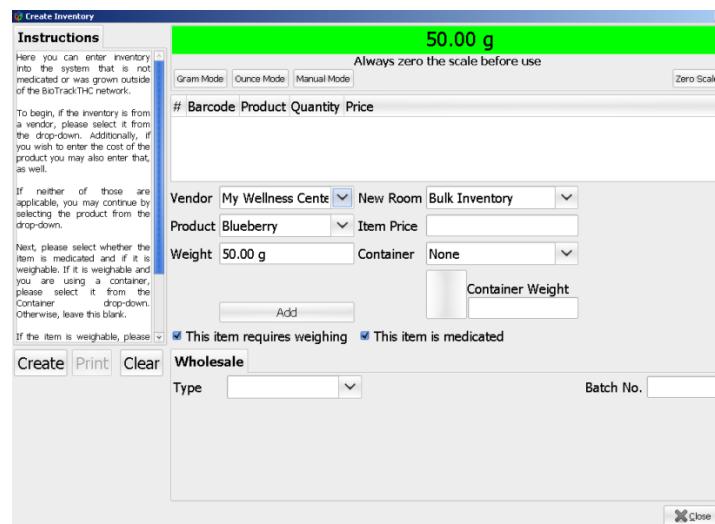
You'll see in the following screenshot that, because the Product was already associated with the "My Wellness Center" vendor, the system automatically populated it in the Vendor drop-down.

If the product is not associated with a vendor, and you are entering a wholesale purchase, you'll next want to select the Vendor from the drop-down. As we move further through the example, you'll see that you can create multiple inventory items at once. However, you may only do so from one vendor at a time. So if you need to add three wholesale purchases from three different vendors, they will need to be done one at a time.

Also, please note that although the Vendor field is optional, the only time you'll want to leave it blank is when initially adding existing inventory when setting up your system. From there on out, you'll mostly want to select a Vendor and input the wholesale purchase information.



Next, we'll need to enter the quantity, or Weight of the item. For this example, we'll put in 50 grams. This can be accomplished either through Integrated Mode by placing the item on your scale or through Manual Mode by clicking into the Weight textbox and entering the amount.



At this point, we need to know if this is a Purchase or a Trade. For example, if we were paying the vendor \$200.00 for the 50 grams, we would click into the Item Price entry box and enter 200.00. If it's a trade, we can leave this blank and simply click Add. Since for this example, we are doing a purchase, we'll go ahead and enter 200.00 in the Item Price and click Add.

The screenshot shows the 'Create Inventory' window with the following details:

- Instructions:** A sidebar with instructions for entering inventory.
- Header:** Shows '0.00 g' and 'Always zero the scale before use'.
- Table:** A grid for entering items with columns: #, Barcode, Product, Quantity, and Price. One row is present with ID #1, Product 'Blueberry', Quantity '50.00 g', and Price '200.00'.
- Vendor:** Set to 'My Wellness Centr'.
- Product:** Set to 'Blueberry'.
- Item Price:** Set to '200.00'.
- Weight:** Blank.
- Container:** Set to 'None'.
- Add:** A button to add more items.
- Checkboxes:** 'This item requires weighing' (unchecked) and 'This item is medicated' (checked).
- Wholesale:** Fields for Type and Batch No.
- Buttons:** Create, Print, Clear, Close.

Now, let's add one more Product, specifically a non-weighable one:

The screenshot shows the 'Create Inventory' window with the following details:

- Instructions:** A sidebar with instructions for entering inventory.
- Header:** Shows '0.00 g' and 'Always zero the scale before use'.
- Table:** A grid for entering items with columns: #, Barcode, Product, Quantity, and Price. One row is present with ID #1, Product 'Blueberry', Quantity '50.00 g', and Price '200.00'.
- Vendor:** Set to 'My Wellness Centr'.
- Product:** Set to 'Pre-Roll'.
- Quantity:** Blank.
- Usable:** Set to '1.00 g'.
- Add:** A button to add more items.
- Checkboxes:** 'This item requires weighing' (unchecked) and 'This item is medicated' (checked).
- Wholesale:** Fields for Type and Batch No.
- Buttons:** Create, Print, Clear, Close.

This time, the system automatically populates the Usable field because it was already set for the product itself. Had it not been set, we would have needed to enter it now. So, like the previous product, let's enter a quantity, in this case 10. Also, let's put the total Item Price at \$5.00. Now, click the Add button to add it to the list.

So, now our list looks like this:

#	Barcode	Product	Quantity	Price
<input checked="" type="checkbox"/> 1		Blueberry	50.00 g	200.00
<input checked="" type="checkbox"/> 2		Pre-Roll	10	5.00

Now, navigate to the Wholesale tab and click on the Type drop-down. There are two choices: Purchase and Trade. If you select Trade, no further action is required. However, if you select Purchase, the following additional text boxes will appear:

The screenshot shows the 'Wholesale' tab of a software interface. The 'Type' dropdown is set to 'Purchase'. The 'Method' dropdown is set to 'Paid' with the value '205.00'. The 'Tax' dropdown is set to 'Tax Exempt'. At the bottom, there are three summary fields: 'Subtotal' (205.00), 'Tax' (0.00), and 'Total' (205.00). A 'Batch No.' field is also present.

The Method drop-down requires you to choose whether you are paying the vendor with Cash, Credit or Check. The Paid textbox will automatically be filled with the total. This can be changed to a partial amount or 0, for example, if you are going to pay at a later point. For now, we'll keep it set at 205.00.

The Tax drop-down allows you to set whether or not tax should be paid on the purchase. By default, the system will set the purchase to Tax Exempt.

Finally, if the entity you are purchasing your items from has a specific batch number that you would like to associate with the purchase, you may do so by entering that number in the Batch No. field. In most cases, you will simply leave this blank.

Now that we've added our products, click the Create button to complete the wholesale purchase and issue new barcodes.

The screenshot shows the 'Create Inventory' window. On the left, there's an 'Instruction' panel with detailed steps for adding inventory. The main area displays a table of items: Blueberry (Barcode 1 0150 3990 8492 1249, Price 200.00) and Pre-Roll (Barcode 2 2338 8848 7374 8387, Price 5.00). Below the table, there are dropdowns for 'Vendor' (My Wellness Cente), 'Product' (New Room), and 'Quantity' (Usable). The 'Wholesale' tab is selected, showing 'Type' set to 'Purchase', 'Method' set to 'Cash' (Paid 205.00), and 'Tax' set to 'Tax Exempt'. Summary fields at the bottom show Subtotal, Tax, and Total all at 205.00. A 'Close' button is at the bottom right.

You'll now notice that each item has its own unique barcode. Also, the Print button is now clickable. Simply click the Print button to print out the checked products.

At this point, you can click Clear if you'd like to start a new purchase.

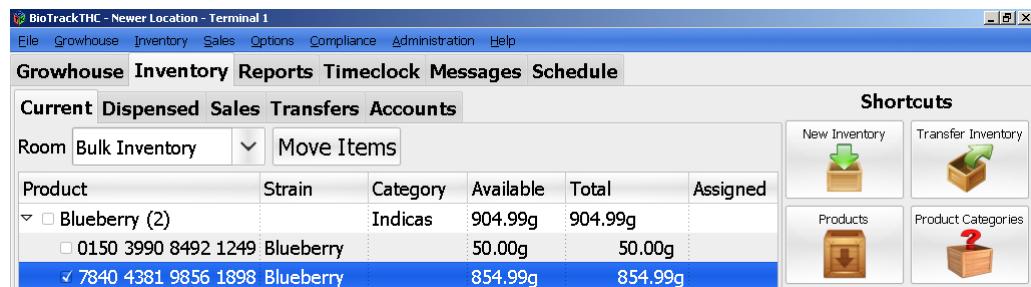
One drop-down that was not discussed in our example was the New Room drop-down. If you have created inventory rooms and you want these new inventory items to be inserted into a specific room right away, instead of being placed into Bulk Inventory, you can select this (before they are added) and this will streamline the process for you.

Transferring Inventory

The inventory transfer screen can be used for transferring inventory from one location to another (e.g. Growhouse to Dispensary), a wholesale sale to a vendor, or it can even be used to perform a wholesale purchase with another vendor selling items that already have a BioTrackTHC barcode attached.

Location Transfer Outbound

The first transfer scenario we will cover is an outbound transfer intended for another location, e.g. from your Growhouse to one of your Dispensary(s). The easiest way to begin this process is to navigate to your Current Inventory and click the checkbox on any items you wish to transfer:

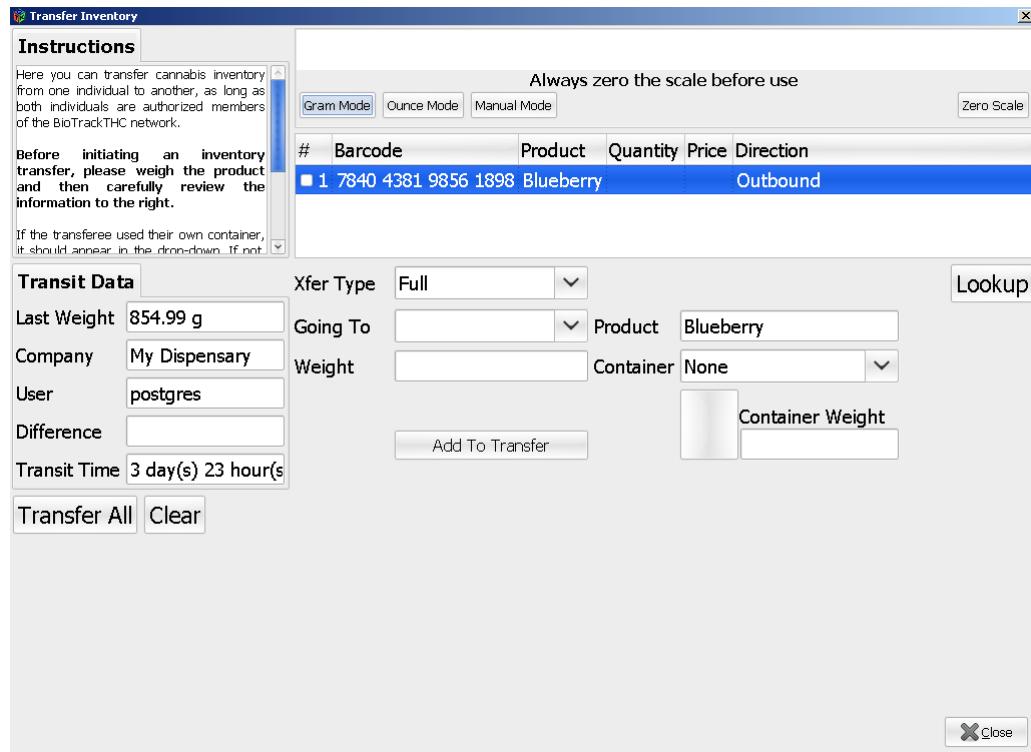


Next, click the Transfer Inventory button:



This will automatically populate the Inventory Transfer screen with the selected items. Another way to initiate a transfer is by looking up a specific item either by scanning the barcode or by highlighting the item on the Current Inventory screen and clicking on the Details button. Next, you'll want to click the Transfer button and this, too, will initiate an Inventory Transfer.

These shortcuts methods are by no means the only way to initiate a transfer. Here's a glimpse at the Inventory Transfer screen:



Once this screen is up, you can simply scan the barcodes of the items you wish to transfer out and they will populate as you scan them. Or, you can also click the Lookup button on the right hand side and type the barcodes in manually.

Once you have highlighted, scanned or otherwise initiated a transfer on a number of items, they will appear in the top listbox. It will list the Barcode, Product and Direction. The Quantity field will be up to you to populate as we go and the Price field, for now, is irrelevant (as that concerns wholesale, discussed shortly).

The left tab shows the Transit Data which will give you an idea of how much the item last weighed, who last weighed it and when it was last weighed.

Now, onto the main aspect of the location transfer. You will need to enter a quantity for each item you are transferring. This can be done by using either the Integrated Mode with your scale or the Manual Mode. For non-weighable items you will simply need to enter the quantity.

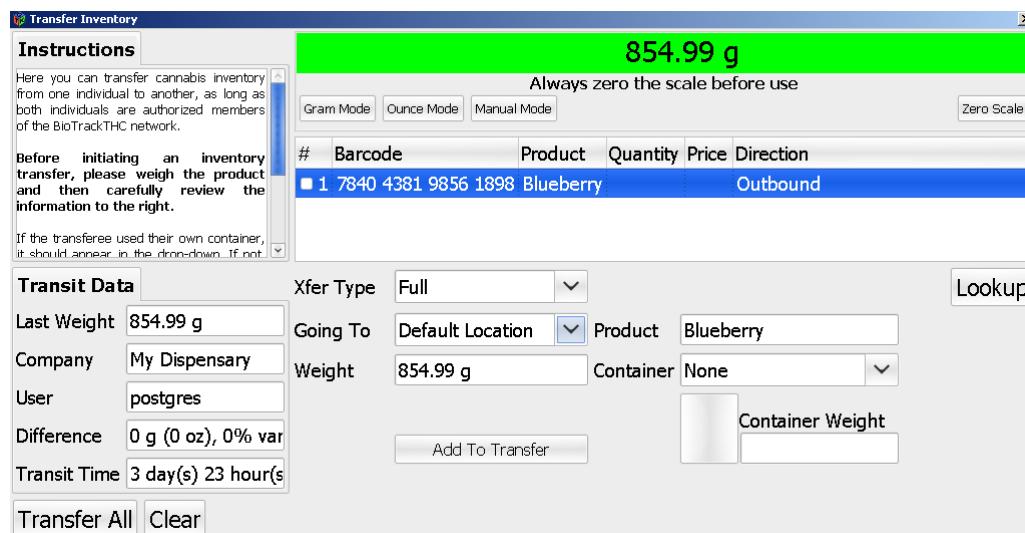
The Xfer Type drop-down offers you two options: Full and Partial. By default, Full will be selected. Let's say that, for example, you have 500 grams of Bud, but you are only transferring 250 grams to your Dispensary location. In such a case, you will want to do a Partial transfer. This will remove the 250 grams from your Growhouse inventory and create a new barcode for the Partial amount that can then be printed and attached to

the partial batch or printed later at the Dispensary. A Full transfer will completely remove the item from your inventory, even if you enter an amount less than what is available. That is, if 500 grams is available, but you perform a Full transfer for 499 grams, the item will be assumed to be completely gone. So if this is not what you intend for such a transfer, click Partial.

The Going To drop-down will contain a list of any additional Locations in the system and a list of all your Vendors. They will be listed in that order for convenience. For now, we are only concerned with additional locations.

The Weight field is, of course, where you will enter the weight that is being transferred out.

For our example, the screen will now look like this:



As we enter the weight, the Transit Data will tell us what variance there is from the last weight, if any.

At this point, we can now click on Add To Transfer and, assuming this is our only item to transfer, we may then click on Transfer All. That's all there is to a location transfer, if you had multiple items the system would have automatically highlighted your next item in the list requiring a weight and so on and so forth. Of note is that you can only transfer items to one location at a time, so if you have two items going to two different locations, you would need to do a Transfer All for the first item and then do another transfer for the second.

You'll receive this upon successful completion of the transfer:



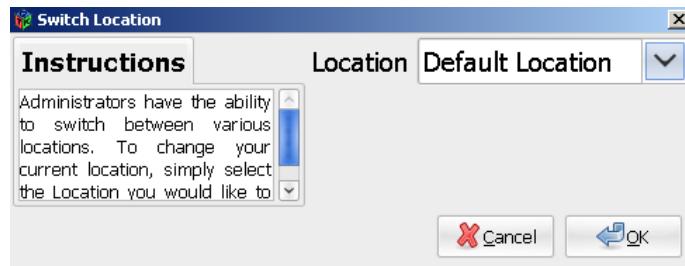
Location Transfer Inbound

Now that we've transferred our inventory out, we're going to switch locations and transfer it into the new location. There is an option that allows you to perform location transfers in one step instead of two and will be discussed later in the chapter, for now let's go ahead and show you how to perform in an inbound location transfer.

To begin, let's do a location switch to the location our previous inventory was transferred to. To switch locations, navigate to the Toolbar and click on Options, Locations, Switch Locations:



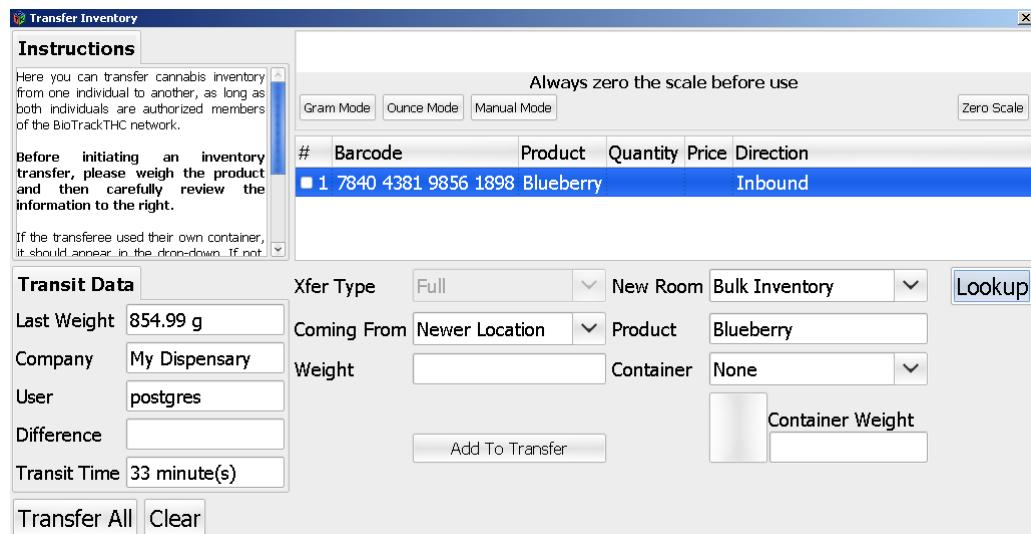
Which will then prompt you to select a new location, in this case we'll select the one we transferred our items to:



Now that we've switched locations, let's navigate to the Inventory tab and click on the Transfer Inventory button:



This will present the familiar Inventory Transfer screen. You can now either scan the barcodes of the items or click on the Lookup button and enter the barcodes manually.



When transferring the items in, you'll notice the Xfer Type is greyed out; this is because an inbound transfer will always be Full.

The Coming From location will automatically be populated with the location the item was transferred from so there is no need to change this.

The New Room drop-down allows you to select where the new inventory will be placed. By default, it will go into your Bulk Inventory, but you can choose to immediately move it into a different room if you have enabled additional inventory rooms.

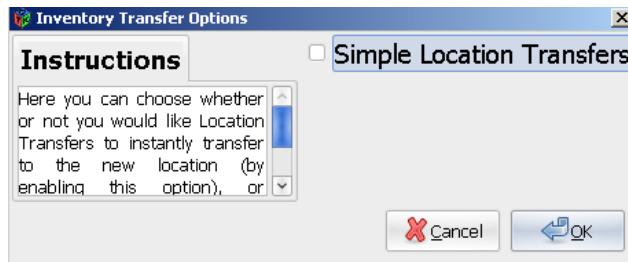
Barring that, to complete the transfer we only need to weigh the item and click Add To Transfer. Once we have done that for all of our incoming items, we can click the Transfer button to complete the inbound transfer. Once again, when completed we'll see the following confirmation screen:



Simple Location Transfers

You may decide that a two-step location transfer is unnecessary, perhaps because your Growhouse and Dispensary are at the same physical location. If this is the case, you can setup your system to enable Simple Location Transfers by navigating to the Toolbar and clicking on Administration, Inventory, Transfers:

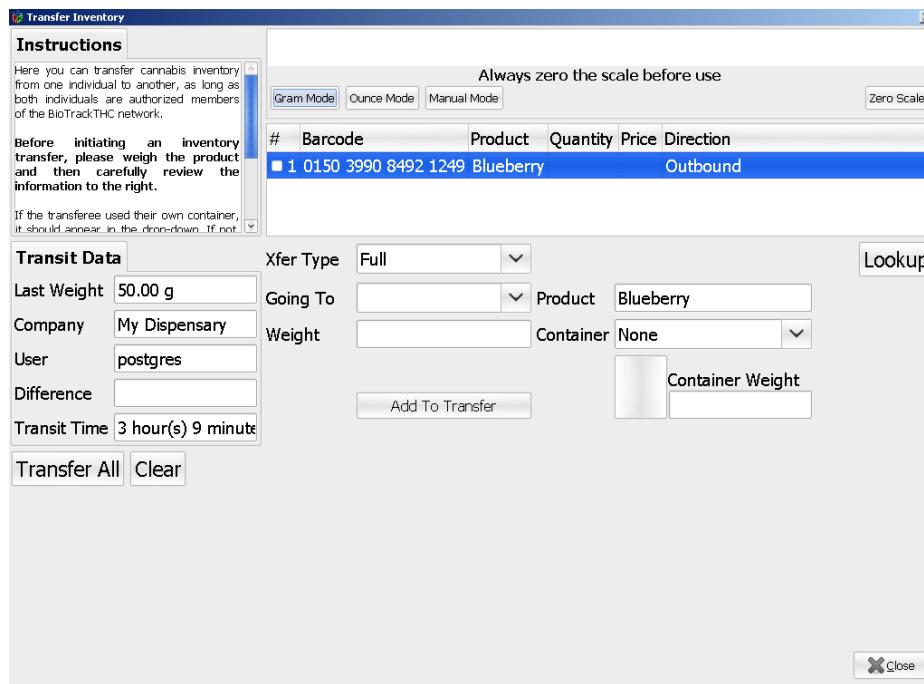




Checking the option will enable Simple Location Transfers system wide, so all locations will be governed by this option. If enabled, an outbound location transfer will then automatically transfer it back into the destination so that nothing need be done on the destination location's end.

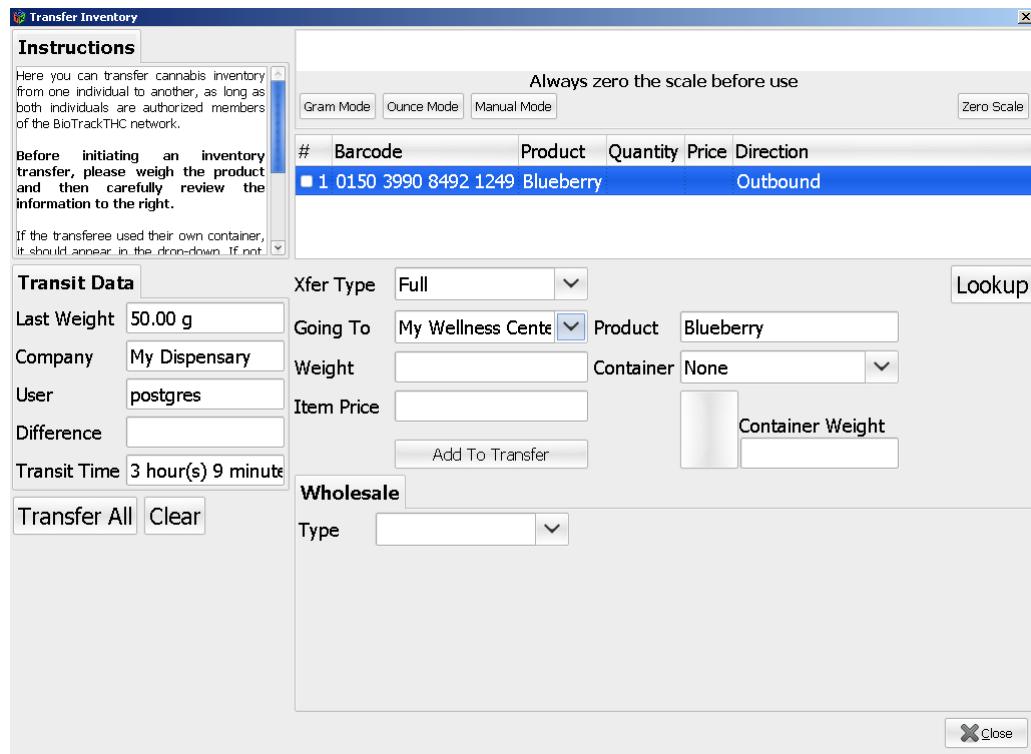
Wholesale Transfer Outbound

To begin a wholesale outbound transfer, that is a sale to a vendor, we'll first need to select what items we want to sell. We can select the inventory items we wish to sell through the same methods as an outbound location transfer. That is, either by checking off the items on the Current Inventory screen and then clicking the Transfer Inventory button or by clicking the Transfer button on a single item's Inventory Details. Or, we can also simply click the Transfer Inventory button and begin scanning the barcodes to be sold.



In the following example, we are going to sell 50 grams to the My Wellness Center vendor by first selecting the vendor from the Going To drop-down.

Once we select the vendor, you'll notice that the Wholesale tab appears at the bottom of the screen:



Next, we'll want to weigh out the item(s) we are selling either by using the Integrated Scale or clicking into the Weight textbox and using the Manual Mode. Once we have entered a weight, we'll then want to enter an Item Price. If this transfer is a Trade and not a sale, you can simply leave the Item Price blank.

Now, click Add To Transfer. If there are additional items, for each you'll want to add the weights and, if a sale, the item's total price.

Having finished adding all of your items to the transfer, now you'll want to select the Type: Sale or Trade. If you are simply performing a Trade, you can click Transfer All after selecting the Trade type and your transfer is now complete.

For our example, we are performing a Sale, and are selling 50 grams for \$200.00, so the following will appear:

Wholesale	
Type	Sale
Method	Paid 200.00
Tax	Tax Exempt
Subtotal	200.00
Tax	0.00
Total	200.00

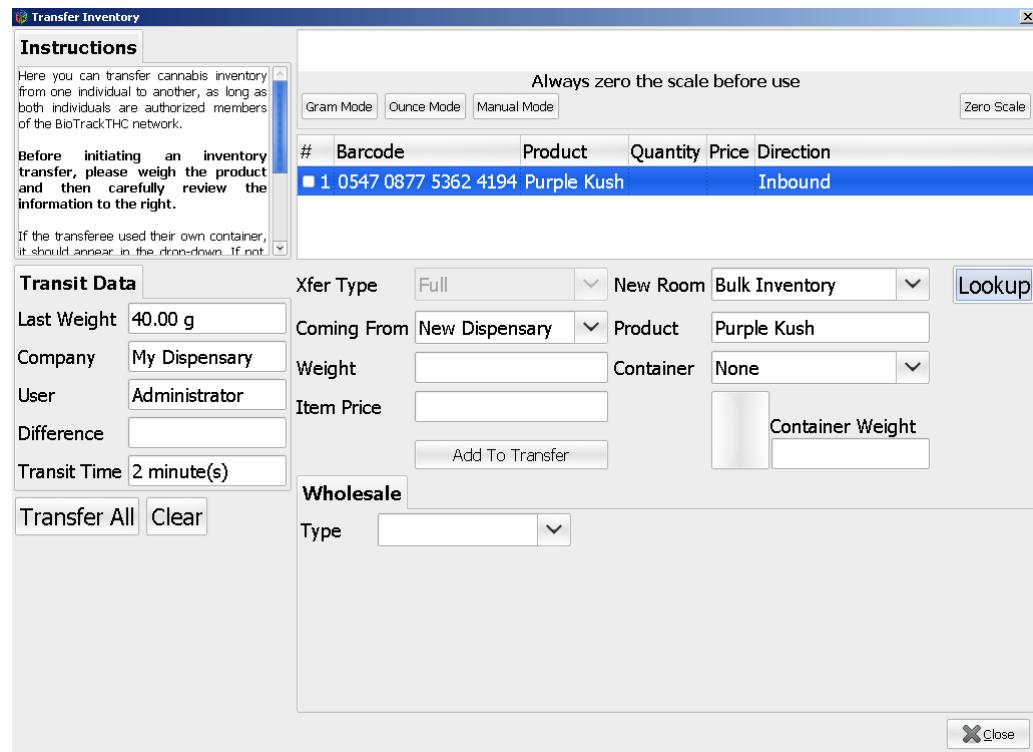
The Method drop-down allows you to select the method of payment from the vendor: Cash, Credit or Check. The Paid textbox allows you to enter how much the vendor is paying up front for the sale. It will be populated, by default, with the full amount due. If the vendor is paying less than that up-front, you'll want to change that now. The Tax drop-down will be set to Tax Exempt, by default, but can be changed to your local tax rate if you wish.

Once you have selected the payment method and modified the Paid amount, if at all, you can now click the Transfer All button to complete the transaction.

Wholesale Transfer Inbound

A normal wholesale purchase can be initiated from the New Inventory screen. However, if vendor you are purchasing from is also using BioTrackTHC and the items you are purchasing has our standard 16 digit barcodes attached, you can choose to import those directly rather than create new barcodes. Ultimately, either way will work fine, so if you prefer the New Inventory method of wholesale purchasing you can use that. Otherwise, here's an explanation of how to use the Inventory Transfer screen for a wholesale purchase when they have BioTrackTHC barcodes attached.

First, scan the barcode(s) of the item(s) you are purchasing:



Once scanned, the system will contact the central BioTrackTHC server which maintains limited information on the barcodes, namely the strain and last weight. At this point, you can now verify the weight either by using the Integrated Mode on your scale or by clicking into the Weight textbox and using Manual Mode. Next, enter the

Item Price. Now click Add To Transfer and continue that process for any additional items.

If this is a Trade, simply select that from the Wholesale Type drop-down and then click the Transfer All button.

If this is a Purchase, select that from the Type drop-down:

The screenshot shows the 'Transfer Inventory' window. At the top right, it displays '40.00 g' and 'Always zero the scale before use'. Below this is a table with one row showing a transfer entry: # 1, Barcode 0547 0877 5362 4194, Product Purple Kush, Quantity 40.00 g, Price 150.00, and Direction Inbound. To the left of the table is a 'Instructions' panel with text about transferring cannabis inventory between individuals authorized on the BioTrackTHC network, and a note to scan the barcode of the item to be transferred. Below the table are sections for 'Transit Data' (Last Weight, Company, User, Difference, Transit Time), 'Xfer Type' (set to 'Full'), 'Coming From' (New Dispensary), 'Product' (dropdown), 'Weight' (40.00 g), 'Container' (dropdown), 'Item Price' (150.00), 'Container Weight' (dropdown), and 'Add To Transfer' button. Further down are 'Wholesale' settings: Type (Purchase), Method (dropdown), Paid (150.00), Tax (Tax Exempt), and Subtotal (150.00). At the bottom right are 'Close' and 'Transfer All' buttons, and a 'Clear' button at the bottom left.

Now, we need to select the method we are using to pay for the purchase: Cash, Credit or Check. Next, we can edit the Paid field to reflect how much we are paying up front, if anything at all. By default, it will be the full amount, but this can be changed to anything including 0.

The system will select Tax Exempt for the purchase, by default, but this too can be changed to the local tax rate.

Once all fields have been completed, you may click Transfer All to complete the transaction. At that point, the barcodes will now be entered in your system and are now fully accessible.

Compliance

This section is currently relevant to the state of Colorado only; all other jurisdictions may continue on to the next section. For those of you in Colorado where the state requires certain forms to be filed in real-time,

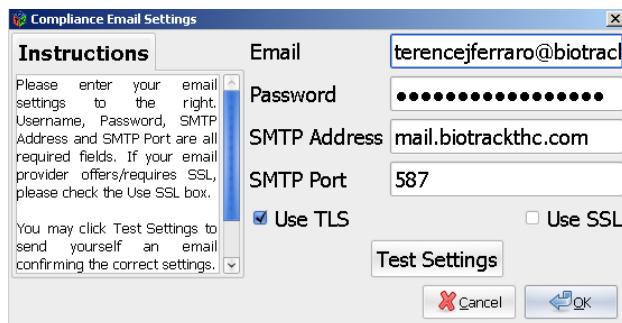
specifically for deliveries and transportation, the system can help you to automate the process.

Email Settings

To begin you'll first need to correctly setup your email settings. To do so, navigate to the Toolbar and click on Compliance, Email Settings:



If you do not have the Compliance drop-down, this means that your locality has not been set correctly. You'll want to navigate to the Toolbar, then click on Options, Sales, Miscellaneous and make sure that the Country is set to the United States and your state is set to Colorado. You'll then need to restart the program for the changes to take effect.



To begin, you'll need to have an email provider that supports SMTP (most do). The Email field should be your full email address, e.g. youremail@gmail.com. Next you'll put your password into the Password field. The SMTP address is the address that your email goes through. For example, gmail uses smtp.gmail.com and yahoo uses smtp.mail.yahoo.com. The SMTP port can usually be found in the same place where you find the address. Gmail, for example, uses port 587 while Yahoo uses 465. The next checkboxes are Use TLS and Use SSL. You can either have both checked, Use TLS checked or Use SSL checked. In other words, it's one, the other or none at all. Gmail uses TLS, while Yahoo uses SSL. When in doubt, contact your email provider and they should be able to provide you with the proper SMTP settings.

Assuming that everything has not been input, click on the Test Settings button and the system will use those settings to send a blank email from yourself to yourself with a blank excel file attached. If you received the file then congratulations as the settings were setup successfully and you can click OK to save them. If they were not or you receive an error after clicking Test Settings, you'll need to verify your email address and password and try again. Or, if you're confident those are correct, contact your email provider to confirm the SMTP settings.

OPC License Sharing

Some centers will have one OPC license that is relevant for both their Growhouse and Dispensary. Others, however, will have a separate OPC license for the Growhouse. You may wish to do enable this option if you have one Growhouse that grows for multiple Dispensary locations. If you recall, every location should have their information set including name, address and license number when setting up locations. If you have not done so, please refer to the beginning of Chapter 2 to complete that process.

To toggle this option, navigate to the Toolbar, then click on Compliance, Manifest Settings.



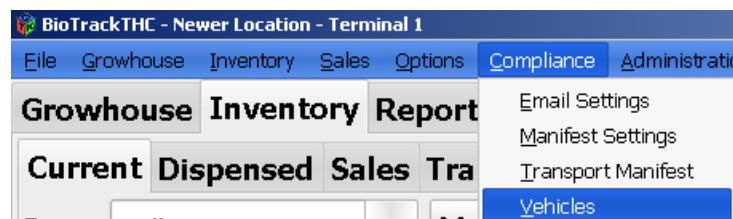
The option is a simple checkbox which can be toggled on or off:



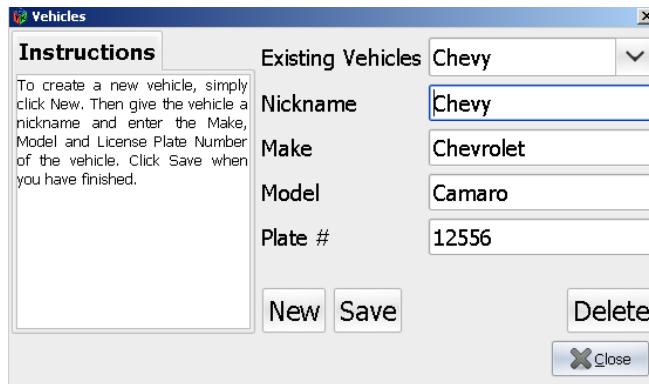
Once you have toggled the option, simply click OK to save your settings.

Vehicles

The next configuration step necessary before we get into the actual Transport Manifest is configuring in the system any vehicles you will be using for transport. Navigate to the Toolbar and click on Compliance, Vehicles:



This will present the Vehicles configuration screen as seen in the next screenshot:



To add a new Vehicle, first click the New button. Next, you'll want to enter a Nickname for the vehicle that will appear to you when selecting it. In the example above, we have used a Nickname of Chevy. Next, enter the Make of the vehicle, in the example that is Chevrolet. Now, enter the Model of the vehicle, in our case we went with Camaro. Finally, enter the Plate # of the car. Once you have entered all of these fields, you may click Save to store the Vehicle.

To modify an Existing Vehicle, click the Existing Vehicles drop-down and select the vehicle you would like to modify. Next, modify any and all fields you wish to change, including the Nickname. Click Save to complete any changes.

To delete a vehicle, click the Existing Vehicles drop-down and select the vehicle you would like to delete. Then click the Delete button. The system will then prompt for confirmation and, once confirmed, the vehicle will no longer be available.

Transport Manifest

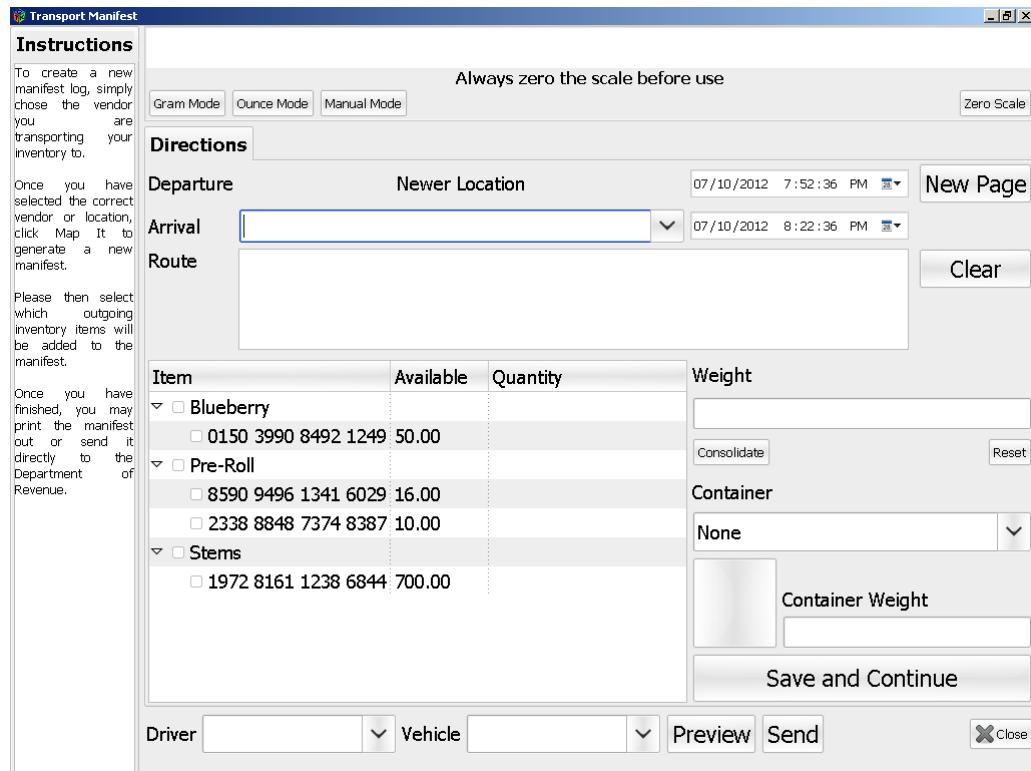
Before we delve into the Transport Manifest, make sure you have input the badge or license numbers of any of your employees that will be transporting products. Please see [Chapter 2](#) for details on entering this data when creating or modifying users.

To open the Transport Manifest, navigate to the Toolbar and click on Compliance, Transport Manifest:



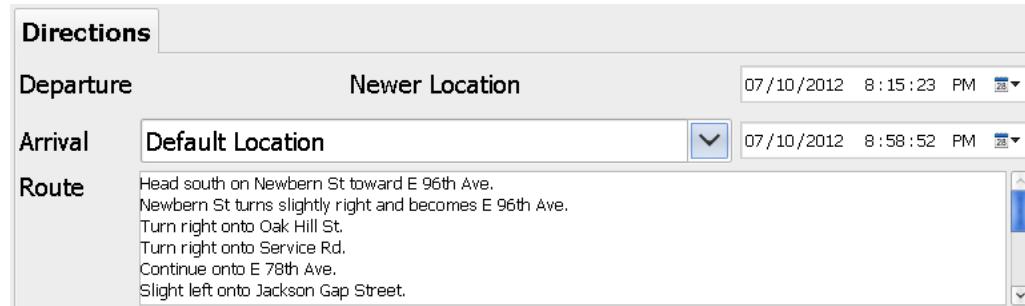
This will then bring up the Transport Manifest screen. You will need to be at the location from which you will be sending the items from. For example, if you are filing a manifest from your Growhouse to your Dispensary, you would need to be set to the Growhouse location. If you were filing a manifest to an outside vendor you would

need to be on your Dispensary location. Here is what the Transport Manifest screen will look like:



The Departure lists your current location, that is, where the inventory will be coming from initially. To the right will be displayed the current date and time. You can change this to a later time if you will not actually be doing the delivery right now.

The Arrival drop-down allows you to select where this delivery will be going. It will, first, show all of the additional locations that are stored in your system and will then list all of the vendors in the system. Once an Arrival location has been selected, the system will display the driving directions in the Route textbox. If this is the first time you have sent an item from the selected location, the system will automatically route a course using Google Maps:



Once this has been mapped, you can now make modifications to directions as you see fit and any modifications will be saved for future use. You'll also notice the system will update the estimated time it should take from start to finish.

Now you'll want to select the inventory items and quantities that will be travelling from point A (Departure) to point B (Arrival).

Item	Available	Quantity	Weight
Blueberry			25.00 g
0150 3990 8492 1249	50.00		
Pre-Roll			
8590 9496 1341 6029	16.00		
2338 8848 7374 8387	10.00		
Stems			
1972 8161 1238 6844	700.00		
			<input type="button" value="Consolidate"/> <input type="button" value="Reset"/>
			<input type="button" value="Container"/> <input type="button" value="None"/>
			<input type="button" value="Container Weight"/>
			<input type="button" value="Save and Continue"/>

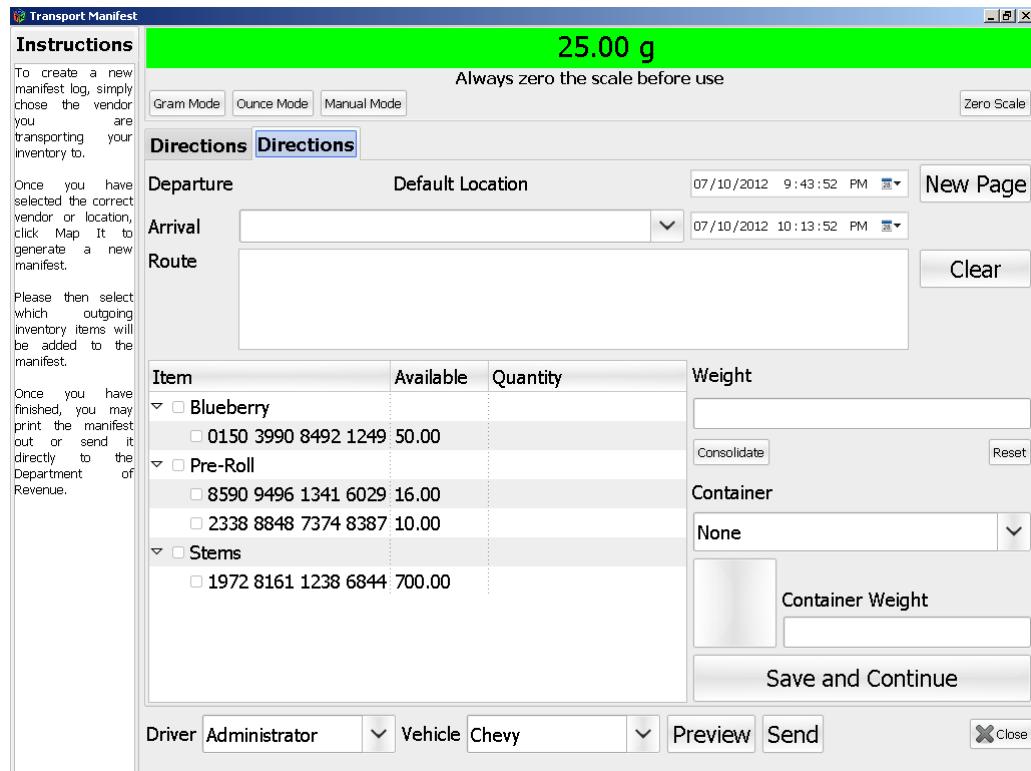
You can add items to the manifest by highlighting a specific barcode, as shown above. Next, if the item is weighable you may use the Integrated Mode on your scale or the Manual Mode by clicking into the Weight box. Once you have set the quantity, click the Save and Continue button to save the quantity for that item and continue onto the next.

Item	Available	Quantity	Count
Blueberry			5
0150 3990 8492 1249	50.00	25.00	
Pre-Roll			
8590 9496 1341 6029	16.00		
2338 8848 7374 8387	10.00		
Stems			
1972 8161 1238 6844	700.00		
			<input type="button" value="Consolidate"/> <input type="button" value="Reset"/>
			<input type="button" value="Container"/> <input type="button" value="None"/>
			<input type="button" value="Container Weight"/>
			<input type="button" value="Save and Continue"/>

For a non-weighable item, simply click into the Count textbox and enter the number of items that will be sent. An item has only been added to the manifest once it has been checked off, as seen above. Once you have selected and weighed all of the items for shipment, you will then need to select both the Driver and the Vehicle from their respective drop-downs.

If there are multiple stops on your trip, you can click on the New Page button to add an additional destination. Once clicked, you'll now notice the ability to select items

once again and to send them to a new Arrival point from the previous Arrival point. For example:



The first page sent items from the New Location to the Default Location. Thus, on our second page, the Default Location is the Departure point from which we can send additional items to other locations or vendors. This second page follows the same process as the first page, including selecting the Arrival point, modifying directions, if necessary and selecting the items for transport.

The system supports up to 3 stops. Once you have added all of your stops and selected all of your items, you can click Preview to generate the Excel spreadsheet that will be sent to the MMED. You must have a program capable of opening xls files on the computer generating the manifest for the Preview button to work.

If you are otherwise satisfied, clicking the Send button will send the manifest to the MMED and also send a copy to your email address (for send confirmation).

Inventory Transfer Shortcut

After filing a manifest, the system will have a record on hand of items that were scheduled for transportation. As such, you can utilize a shortcut in the system for the actual inventory transfer. If you navigate to the Inventory Transfer screen and lookup one of the items that was on the manifest, the system will automatically populate the screen with any and all additional items with quantities and the destination already populated. If it is a simple location transfer, you can simply click Transfer All to

complete the transfer. If the transfer is a wholesale sale, you'll want to go through each item and add the wholesale purchase information as you would a normal wholesale transaction. But in such a case, it does save you the trouble of entering weights and quantities.

In either case, if the amount being transferring is less than the total on-hand, the system will automatically set the transfer to partial for you. This can, however, be changed if necessary.

Reviewing Inventory Transfers

Once an inventory transfer or wholesale transaction has been processed, you can review these via the Transfers tab under the main Inventory tab, as seen below:

Time	Strain	Direction	User	Quantity	Vendor
07/09/2012 11:40 PM	Blueberry	Outbound	postgres	854.99 g	Default Location
07/09/2012 10:27 PM	Blueberry	Inbound	postgres	50.00 g	My Wellness Center 20
07/09/2012 10:27 PM	Purple Kush	Inbound	postgres	10	My Wellness Center 5

This tab will show general information on your transfers, including the: Time of the transfer, Strain, Direction, User who performed the transfer, Quantity, Vendor or Location the item was transferred to, Price where applicable, Full or Partial transfer indicator and Batch #.

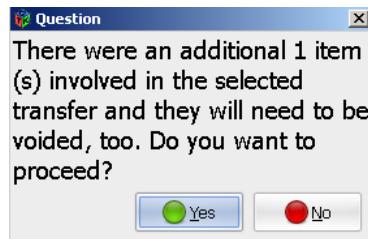
You can use the Print Barcode button at the bottom of the screen to re-print, as necessary, the barcode of any item transferred. This can be very useful when an item is Partially transferred out (and thus receives a new barcode for the partial amount), but the barcode was not printed out at the time of transfer.

The Start and End dates allow you to go back in time and look at transfers on previous days. By default, the dates will be set to the current date. Clicking into one of the boxes will popup a calendar that allows you to select any date range.

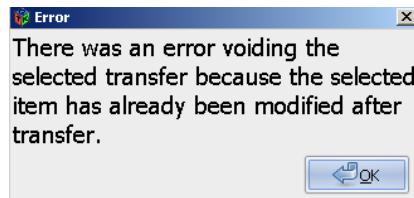
Voiding a Transfer

Once a transfer or wholesale transaction has been made, it may sometimes be necessary to cancel due to a mistake in the original transaction. To do so, simply highlight the transfer as seen in the previous screenshot at click on the Void Transfer button. There are limitations to the ability of a transaction to be voided, specifically, if the inventory item has been modified after transfer; the transfer can no longer be voided.

For example, if we attempt to cancel a previous wholesale transaction that was a sale containing two items and attempt to cancel the transfer of one of these items, we will see the following question:



If we attempt to cancel a transfer that has already been modified in some way, we will receive the following:



If you have performed a location to location transfer (e.g. Growhouse to Dispensary) and are not using Simple Location Transfers, you may run into the previous error if the receiving location has already transferred the item into their inventory. However, if no additional changes have been made, you can still void the transfer. But you'll need to do it in two steps (just as the transfer itself was made in two steps). First, switch to the receiving location:

You will then receive the following confirmation upon a successful void:



Now, you can switch back to the origin location and void the transfer on that end:

Time	Strain	Direction	User	Quantity	Vendor
07/09/2012 11:40 PM	Blueberry	Outbound	postgres	854.99 g	Default Location

Once again, if you have enabled Simple Location Transfers, this will be unnecessary and can be accomplished in one step.

Accounts Receivable and Payable

As you make wholesale purchases and sales, you may only pay or receive partial amounts with the rest due at a later point in time. The system can show you all of these and more on the Accounts tab under the main Inventory tab, as seen below:

Account	Date	Outstanding	Total	Age
My Wellness Center	07/10/2012	120.00	220.00	0 Day(s)
Blueberry (200.00 g)			220.00	

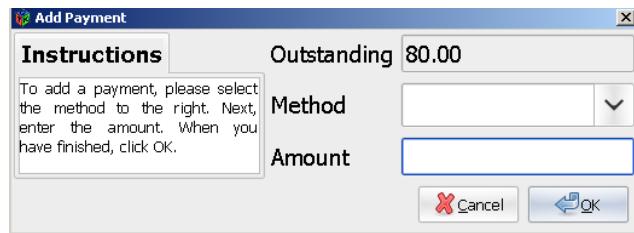
The Accounts drop-down allows you to select from either Receivable or Payable. The Age drop-down allows you to select the age of the accounts with the available options including: 30 Days, 60 days, 90 Days, 120 Days, 6 Months, 1 Year and All.

The list itself will show the vendor with whom the account is with, the date of the purchase or sale, how much of the original balance is still outstanding, the total amount of the original transaction and the age of the account. Additionally, if you click the Expand All button in the bottom right hand corner of the screen it will expand all of the accounts to include a list of all of the items that were in the wholesale transaction.

If at any time you wish to filter by vendor, that is, to only review the outstanding transactions for a specific vendor, you can do so in the Reporting section, described in a [later chapter](#).

Paying Out

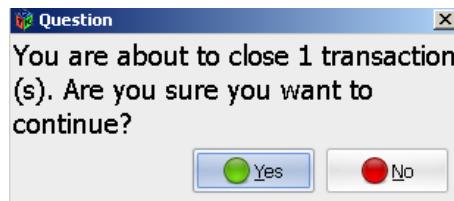
You may have noticed the checkboxes next to the transactions. If at any time you need to add a payment to an outstanding account, you can check the account you want to add a payment to and click the Pay Out button. You may only check one item at a time for this function. Once selected, you'll see the following screen:



It will show the outstanding balance on this particular transaction and ask for you to enter the method of payment, with options of Cash, Credit or Check and also the amount. The amount does not need to be the full amount; it can be a partial payment with the system updating the total still remaining outstanding.

Closing Out

If you can no longer collect on a transaction or want to remove a debt that you owe, you can do so by checking off the transactions you'd like to close out (with no limit unlike the Pay Out option) and click the Close Out button. You will then receive the following confirmation:



Inventory Audits

In the course of doing business, you will want to occasionally perform inventory audits to confirm or adjust what's showing in your inventory and what you actually have on hand. [Previously](#) in the chapter we covered how to adjust one item, now we will discuss how to perform an Inventory Audit which will allow you to audit and adjust a portion or all of your on-hand inventory. To begin, let's navigate to the Inventory tab, next you'll want to click on the Inventory Audit icon:



This will present the Inventory Audit screen:

Item	Original	New	Difference
Blueberry	4412 7807 1141 2103 40.00		
	0150 3990 8492 1249 50.00		
Clone	8964 0586 7498 4480 1.00		
Pre-Roll	8590 9496 1341 6029 16.00		
	2338 8848 7374 8387 10.00		

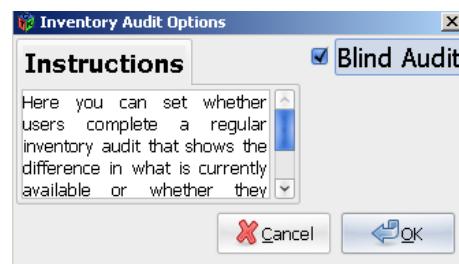
The radio button at the top that reads Bulk Inventory is the current inventory room we are in (and thus auditing). If you have created additional Inventory Rooms and were in one of those, that room would appear as well and only show you the inventory in that room (we'll show an example of this at the end of this section).

The list will show all of the Items in your inventory with the Original (current) weight, the New weight (once counted) and the difference in weights. If you wish for your employees to run a blind audit, that is, not be able to see the original weights or the

difference, you may enable (or disable) this by navigating to the Toolbar and clicking on Administration, Inventory, Audits:



Which will present the Inventory Audit configuration screen:



Simply checking the box and clicking OK will enable the Blind Audit. Please note that if the user logged into the terminal is an Administrator this toggle will have no effect and the Audit will not be blind.

The Accounted For textbox will show, as you progress, how many items you have counted and saved. Conversely, the Remaining textbox will alert you as to how many items have yet to be accounted for.

To the right, the system will display information about an inventory item as it is highlighted, including the name and the barcode. The New Weight textbox will populate with the weight on the scale if you are using Integrated Mode, otherwise you will need to click into the box if you are using Manual Mode.

You may also notice the Consolidate and Reset buttons right below the New Weight box. These allow you to weigh certain items that are spread between multiple containers or items that exceed the weight threshold of your scale. In other words, let's say your system says there is 800 grams of an item outstanding, but your scale only goes up to 600 grams. You could place an initial weight on the scale, click the Consolidate button, then put the additional amount on the scale. The system will automatically add them up for you and display the combined amount in the New Weight textbox. If you need to undo this and start the weighing over from scratch, click the Reset button.

The Zero button is a shortcut to zero out an item if there is no longer any of the item in inventory. Once an item is highlighted, simply click the Zero button to do so.

The Container drop-down will, of course, allow you to select an existing container that the item is being weighed in. On the dispensary side of things, this can get a little tricky

due to the fact that non-medical grade containers (which are a lot cheaper than the medical grade ones) can vary by a couple grams even among the same model exact type of container. Because of this, the system has been setup such that if you happen to enter a container weight on-the-fly (by clicking into the Container Weight textbox) and audit the inventory, the system will remember this on-the-fly container weight and re-apply it by default on the next audit. This can speed up the process of an audit considerably if you do not pre-define the containers. You can simply weigh the container once for an inventory item and you will not need to weigh it again for an inventory audit until the expiration of that specific inventory barcode (and thus re-use of the container for a different barcode).

Finally, you'll notice the Notes tab. This allows you to take, on an item by item basis, notes as to why there is a difference, if any.

To make more sense of this, let's walk through an example. First, we'll select our first item, which should be 40 grams, but we will only weigh out 39 grams and make a note about the reason why it lost some weight:

Item	Original	New	Difference
Blueberry	4412 7807 1141 2103 40.00	39.00	-1.00
Clone	8964 0586 7498 4480 1.00		
Pre-Roll	8590 9496 1341 6029 16.00		
	2338 8848 7374 8387 10.00		

Instructions
Here you can run an inventory audit on all of your current inventory.
To select an item, simply click on the item to the right, or scan the barcode on the item.
Once selected, please weigh the item. If your item is contained within multiple containers, you may weigh each in turn by clicking the consolidate button.
Additionally, if you are using a container, you may select it to the right. For the purpose of the inventory audit, the container weight will be saved for your next audit of that particular item.
After weighing the item, click Save and Continue to move on to the next item.
Once you have accounted for all items, simply click OK to complete the audit.

39.00 g
Always zero the scale before use

Gram Mode Ounce Mode Manual Mode Zero Scale

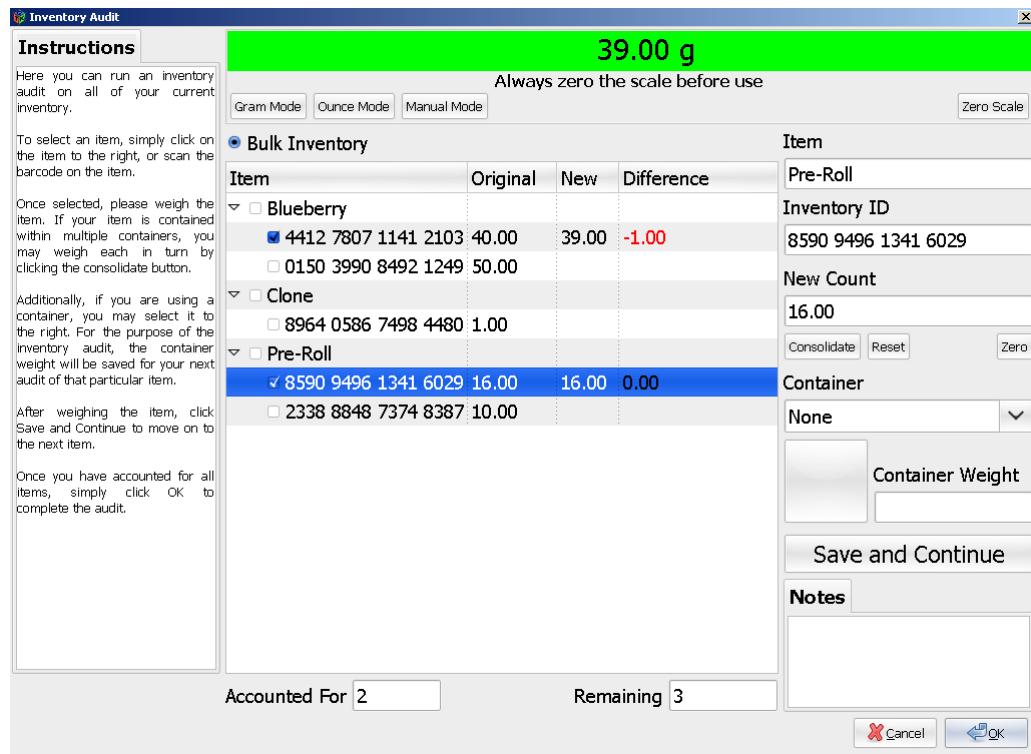
Item: Blueberry
Inventory ID: 4412 7807 1141 2103
New Weight: 39.00 g
Container: None
Container Weight:
Save and Continue
Notes: Water loss

Accounted For: 1 Remaining: 4

Cancel OK

We have also hit the Save and Continue button, which will put a check mark next to the item, add it to our Accounted For count and decrement the Remaining count.

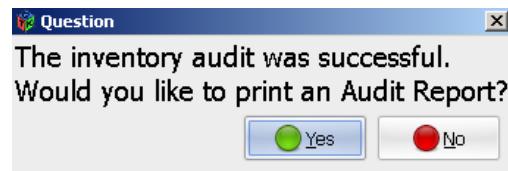
Next, let's select one of our non-weighable items. Whether using the integrated scale or not, we'll need to click into the Count box and enter the number of items that are present:



After hitting Save and Continue, this too will be saved and the difference, if any, will be shown.

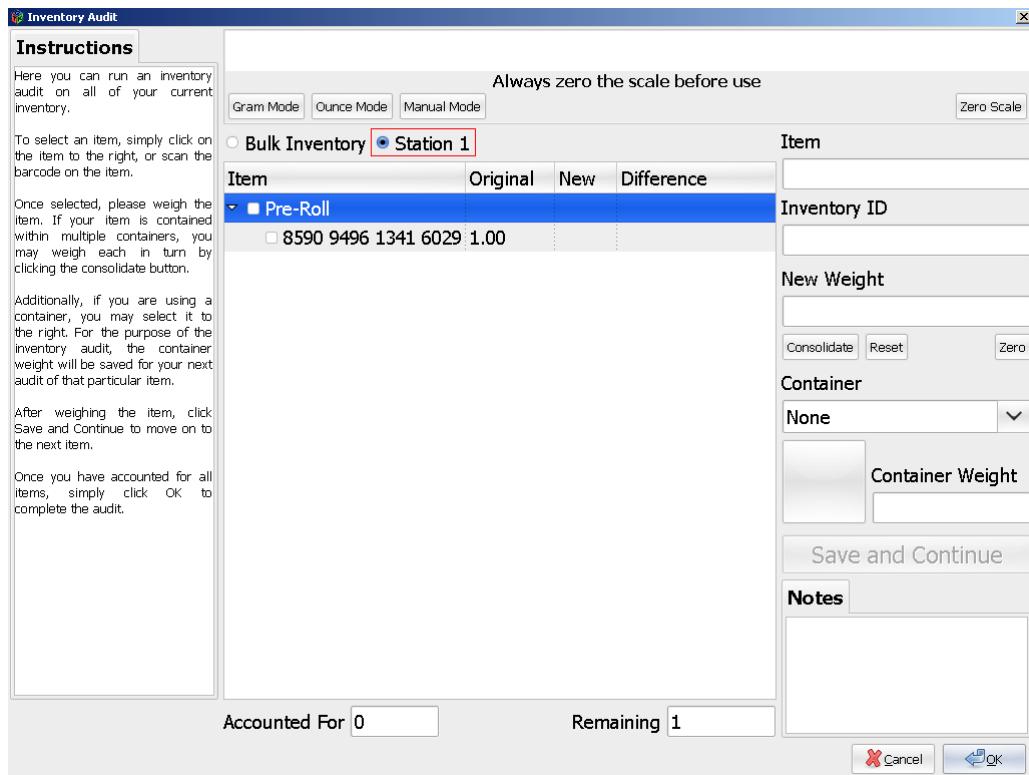
Another way to highlight an item, by the way, is to simply scan its barcode. You do not need to audit every single item in an inventory audit, but the resulting report will reflect how many items were audited and how many were not.

Once you have compared and audited all of the items you wish to audit you may click OK to complete the audit. Once completed, you'll receive the following popup:



This allows the user to print out an audit confirmation for their own records. However, keep in mind this report can be run and printed at any later point in time, as well.

If the audit was performed while in a specific inventory room, you'll notice that the audit will only show those items that are in that particular room with their respective quantities, as shown in the following screenshot:



The room can easily be switched back to Bulk Inventory if that was what the user actually intended to audit.

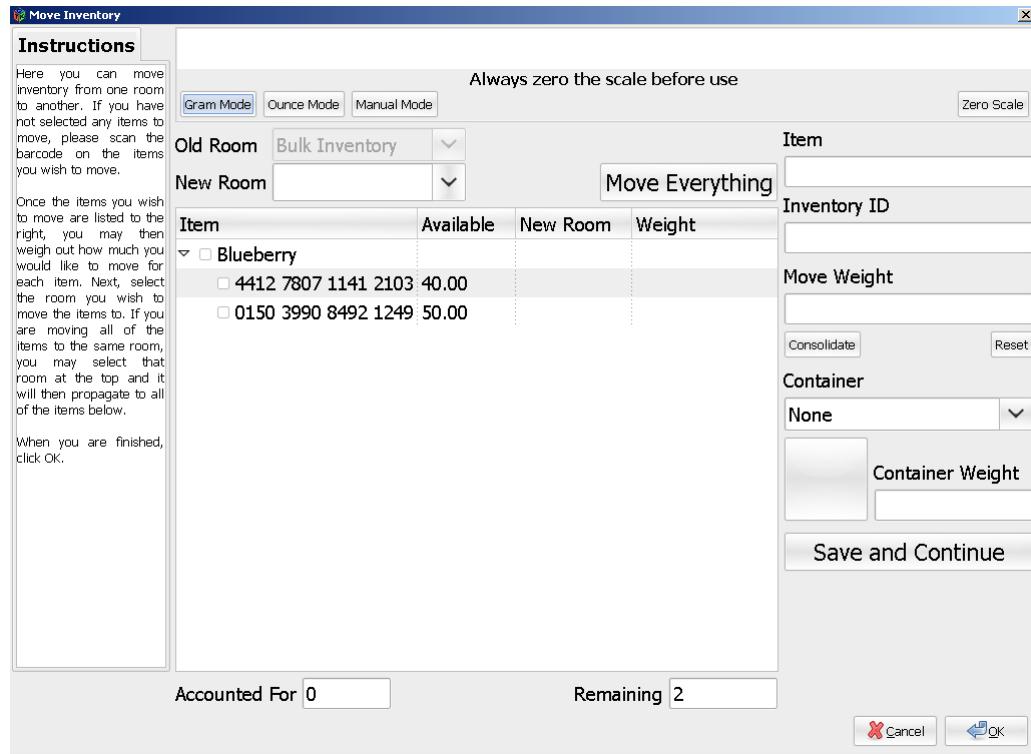
Moving Inventory Between Rooms

We have discussed the concept of Inventory Rooms at multiple points [throughout the chapter](#). First, we covered how to create them. Next, we talked about importing new transfers into a specific room instead of into the Bulk Inventory. And, in the last section, we talked about auditing a specific Inventory Room as opposed to the Bulk Inventory as a whole. Now, we'll cover how to move inventory back and forth between the Bulk Inventory, various rooms and more.

The easiest way to move items from one room to another is to navigate to the Current Inventory tab and check off any items you wish to move. Next, click on the Move Items button, as seen below:

Growhouse Inventory Reports Timeclock Messages Schedule						
Current		Dispensed	Sales	Transfers	Accounts	
Room	Bulk Inventory	Move Items				
Product	Strain	Category	Available	Total	Assigned	
▀ <input type="checkbox"/> Blueberry (2)		Indicas	90.00g	90.00g		
✓ 4412 7807 1141 2103 Blueberry			40.00g	40.00g		
✓ 0150 3990 8492 1249 Blueberry			50.00g	50.00g		

This will then bring up the Move Inventory screen, as seen below:



This screen should look somewhat familiar; its use is almost identical to the inventory audit. You'll notice, however, the only items that show up are the ones that we have checked off. We can add more items by closing this screen and checking more off, or, we can also simply scan the barcodes of additional items we wish to move. In fact, you can use this screen by simply clicking on the Move Items button without checking any items off and add items purely by scanning the barcodes; it's entirely up to you as to which method is easier.

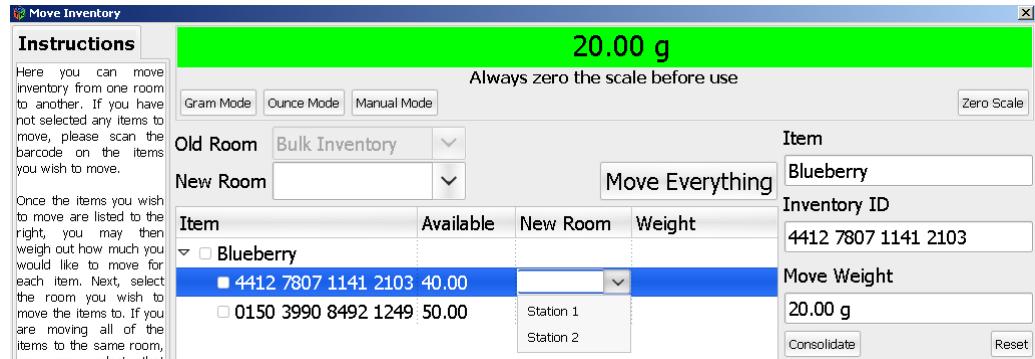
The area to the right will display, once a specific item has been highlighted, the item's name and barcode. Once highlighted, you can then input, either via your scale's Integrated Mode or through Manual Mode the weight or quantity of the item you wish to move to a new room. This can of course be the full amount or any partial amount therein.

The Move Everything button is a shortcut method that will automatically set the full quantity/amount for every item that is listed.

The New Room drop-down allows you to select for all items which room you would like to move the items to. This is actually just a shortcut method, as you can set different rooms on a line by line basis.

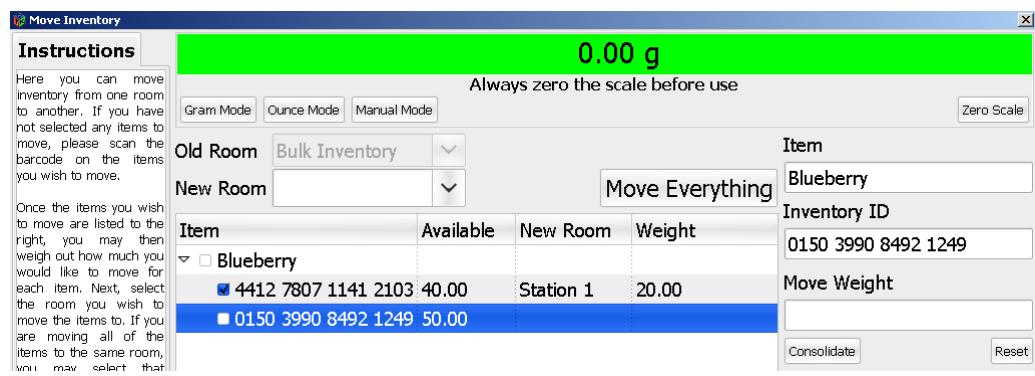
The Accounted For and Remaining textboxes will alert you as to how many items you have selected to move and how many from the list are still waiting for you to select a New Room or quantity for.

A small demonstration should show how to use screen. First, we'll highlight our 40 grams of Blueberry and enter a weight of 20 grams on the scale. Next, we're going to double-click on the New Room column in that row. This will bring up the following for us:

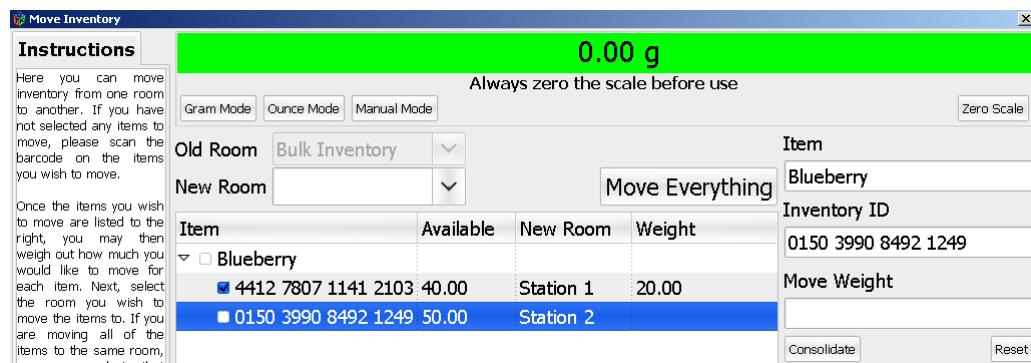


As mentioned earlier, we could have simply selected a room from the New Room drop-down at the top of the screen and this would have set that room for ALL of our items, but for this demonstration we will show sending two items to two different rooms.

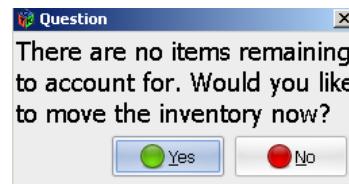
So, I will click on Station 1 from the drop-down and then hit the Enter key to save my room choice. Next, let's click the Save and Continue button in the bottom right hand corner to save our weight value and move onto the next item. Now our screen will look like this:



With the second item highlighted, we're going to now enter a weight of 10 grams to move to our second Inventory Room called Station 2. First we'll double click on the new Room column in our highlighted row to bring up the room drop-down. Next, we'll select the Station 2 room from the drop-down and hit enter. The screen will now look like the following:



Let's go ahead and enter our weight of 10 grams now and then click Save and Continue:



The system detects that there are no additional items to account for and asks if we'd like to go ahead and move them now. If there are additional barcodes you want to scan you can click No and then proceed. Otherwise, simply click Yes to move the items.

After we have moved our inventory, we are going to switch to the Station 1 room by clicking on the Room drop-down and selecting Station 1. Our inventory now looks like this:

BioTrackTHC - Newer Location - Terminal 1						
File Growhouse Inventory Sales Options Compliance Administration Help						
Growhouse Inventory Reports Timeclock Messages Schedule						
Current	Dispensed	Sales	Transfers	Accounts		
Room	Station 1		Move Items			
Product	Strain	Category	Available	Total	Assigned	
► <input checked="" type="checkbox"/> Blueberry (2)		Indicas	20.00g	90.00g		
► <input type="checkbox"/> Clone (1)		Clones	0	1		
► <input type="checkbox"/> Pre-Roll (2)		Strains	1	26		

The system knows that, at this terminal, we have 20 grams of Blueberry available, but a total of 90 grams available total at the location. You can control which Inventory Room a terminal logs into by default by referring to the section titled [Setting up a Terminal's Location](#) in Chapter 2. This can be used to bind certain users only to the inventory they have designated at their station and require an administrator with the proper permissions to make transfers, as necessary. Or if a user has permission to

switch back and forth; it can simply be an additional measure to ensure inventory compliance.

Price Points

Setting prices on products can be a very time consuming process if you happen to have many prices or if your prices change often. This can be streamlined using the Price Points shortcut, found on the Inventory tab and denoted by the following icon:

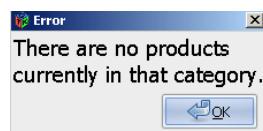


Which will bring up the Price Points screen:

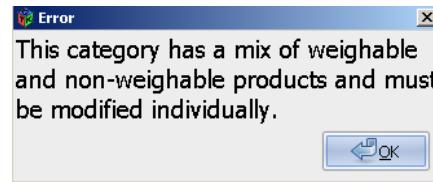


This screen will allow you to set price points per category and, if you so choose, update all of the products current in a category.

To begin, select a Category from the drop-down. In the example above, we have selected the Indicas category. After we have selected a Category, the system will check the category to ensure there is at least one active product within the category. If there is not, you will receive the following error:



Additionally, the system will also check the types of products within a category. All of the products must be similar in terms of weighing, that is, if a category contains both products that are weighable and products that are non-weighable, this shortcut cannot be used (because they use different types of price points):



Once we have selected an eligible category, we can then begin building a price point table. For a primer on creating price point tables, please refer to the [Products section](#) detailed earlier in the chapter. In our screenshot example, we have created a very simple example that charges \$38 for 1 gram. We could, of course, add many additional price points to this table, but for now let's keep it simple.

If we click on the Save button, the category will now have a default price point table set. Once this has been saved, you will see when adding new products, simply selecting that category will automatically populate the default price point table:

Amount	Price
1.00 g	\$38

We can still, of course, make individual modifications to each product's price point table, but this certainly makes adding new products a lot easier!

If you'd like to change the price of many items at once for a category, instead of clicking the Save button go ahead and click the Save and Apply button. This will not

only save the new price point table as the default for that category, but will update every product that already exists within the category. This can also be a big time saver when many product prices need to be updated all at once.

Chapter

5

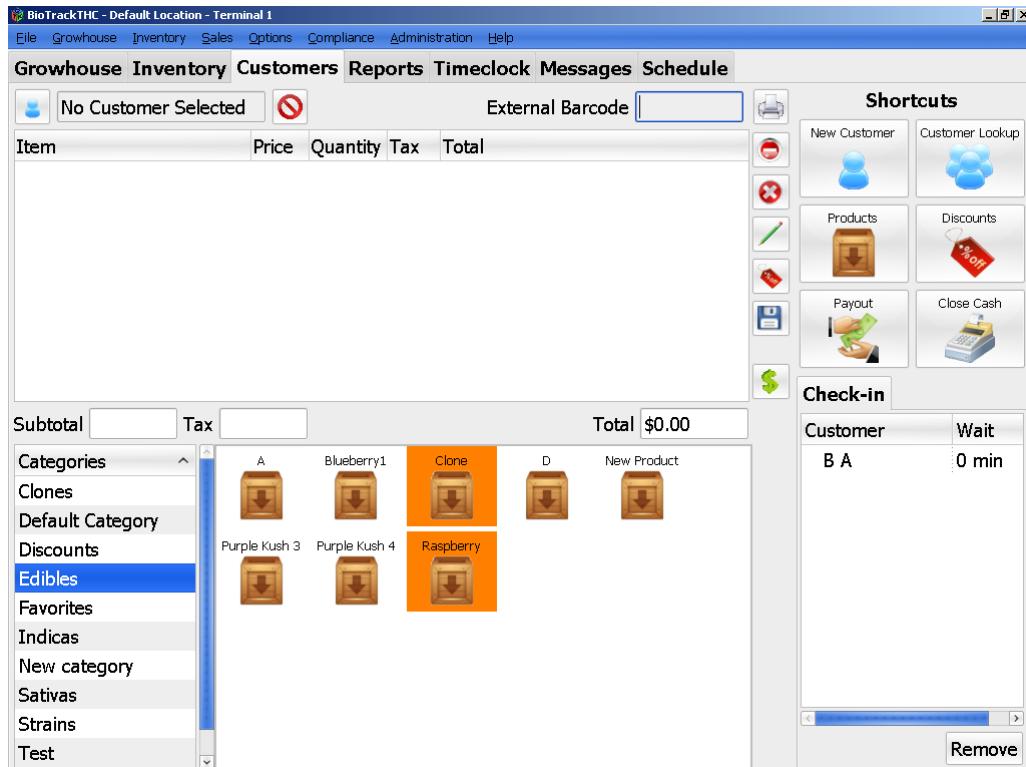
Chapter 5: Customers

In this chapter, you'll learn how to:

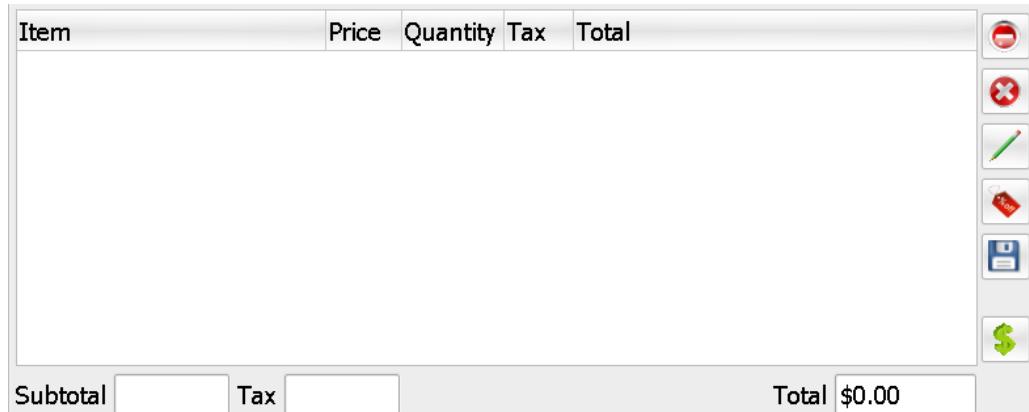
- ✓ Enter new customers into the system
- ✓ Check customers in
- ✓ Scan and Upload Documents
- ✓ Make a Sale

The Basics

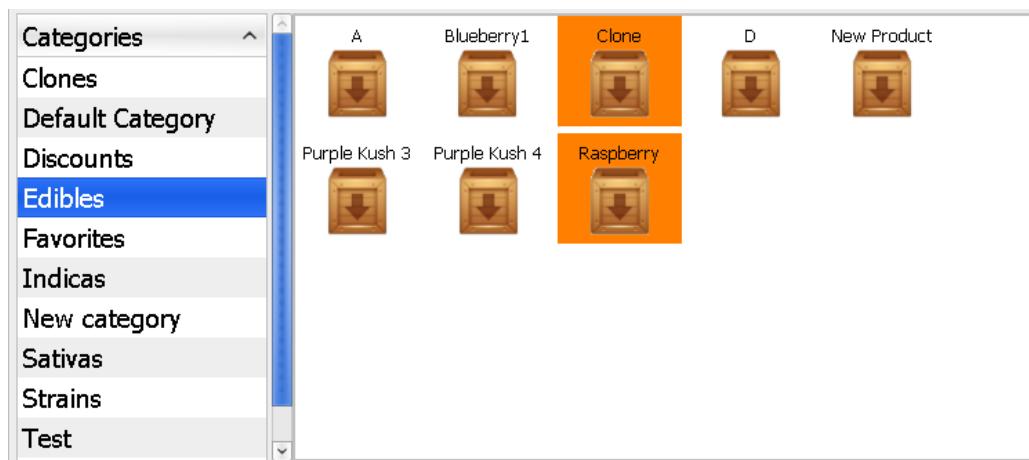
The Customers tab can be used by front desk attendants who need to check customers in and sales clerks alike. Once the Customers tab has been clicked, you should see something similar to the following:



The top left corner of the screen will list the name of the currently selected customer. If no customer is currently selected the textbox will read “No Customer Selected”. The main area denoted here:



As a purchase is being processed, this area will display the sale as items are being added to a customer’s ticket. It will also show any discounts as they are applied, as well.



The bottom area, shown above, lists all of your available product categories on the left hand side. Clicking on a category will display all of the products available to the right. This screen and configuration options for it will be described later in the chapter.

Check-in	
Customer	Wait
B A	30 min

Remove

The Check-in tab will show any customers at the current location that have been checked-in and will also list how long they’ve been checked-in for. Clicking on a customer in the Check-in tab will make them the active customer. Clicking Remove will remove them from the check-in queue.

Adding New Customers

New customers can be added a number of ways through BioTrackTHC. First, we'll cover the manual method and go from there. To begin, navigate to the Customers tab and click on the New Customer shortcut button:



This will then present the Customer Lookup screen, seen partially below:

 A screenshot of a software application window titled "Customers". At the top left, there is a checked checkbox labeled "New Customer". Below it is a search bar with the placeholder "Search" and a "Search" button. Underneath the search bar is a navigation bar with four tabs: "Basic Info" (which is highlighted in blue), "More Info", "Marketing", and "Custom". The main area contains several input fields for customer information. The "Basic Info" section includes fields for Last Name ("Foobar10"), First Name ("Foobar10"), Middle Name ("Middle"), Phone Number ("303-222-3343"), Birthday ("5 / 8 / 1970"), Email ("me11@myisp.com"), Cell Phone Number ("555-555-5555"), Carrier ("ATT"), MMJ Card Number ("MMR1"), Exp Date ("10 / 15 / 2011"), DL # ("F0000000000000000"), Exp Date ("01 / 2015"), Referral Method ("Friend"), Member Status ("Non-Member"), Discount Rate, and Since Date ("7 / 1 / 2011").

Basic Info

This tab contains basic customer information including the customer's name, phone number, email address, cell phone number with carrier, MMJ card number with expiration, driver's license number with expiration, referral method (if any), member status, discount rate override (if any), and how long they've been a customer.

The Cell with Carrier can be used to utilize the Marketing features within the system (discussed in a later chapter) to send text messages to your customers. The Carrier is required because every cell phone carrier has an email-to-sms gateway and the system takes advantage of this to enable the sending of text messages for free.

The Referral method is a drop-down that is automatically populated with new Referral methods as you enter them. In other words, if you type in Whitepages as the referral method in this textbox, it will now be a choice in the drop-down for future customers. This makes it easy to re-use the same referrals over and over again.

The Discount will automatically be populated if and when you are using a percentage based discounts for members. You can, however, override on a customer-by-customer basis with a different percentage.

For Canada, the MMJ Card is often used as the membership number for your center.

More Info

This tab contains additional customer information including the customer's address, city, state (or province) and zip code (or postal code).

Address	1245 Foobar Way	Apt/Suite	
City	Denver	State	CO
Plants	6		
Location	Default Locati	<input type="checkbox"/> Tax Exempt	
Limit			

If you are in a jurisdiction that tracks plant counts to customers, you will also see a plant count textbox (that defaults to 6).

The Location drop-down will default to the current location, but if you have multiple dispensary locations on one system you can switch this to whatever location you need to.

The Limit allows you to define a purchase limit on a customer-by-customer basis. There are global limits that can be set (discussed later in the chapter), but this customer defined one will allow you to override the global limit. This can be useful if, for example, your jurisdiction has a 2 ounce daily limit, but a certain customer is allowed to purchase more with doctor approval.

The Tax Exempt checkbox allows you to define a customer as always being exempt from taxes.

If you are in certain jurisdictions (e.g. Canada), you will also see these additional fields:

MMAR	
Caregiver	
Doctor	

For those jurisdictions (e.g. Canada), these fields allow you to enter the customer's MMAR number, if they possess one. You may also enter the name of their Caregiver. The Doctor drop-down will contain a list of Doctors you have added to the system. To add, modify or remove the doctors stored in the system, simply click on the Doctor button.

Marketing

This tab contains information pertaining to the marketing system (explained in detail later). Specifically, it will include the number of visits the customer has had and the amount of money they have spent to date. Also, if the points based loyalty system is enabled, it will display how many points the customer has remaining. It will also allow the user to select or unselect whether the customer is opted-in to Email or SMS marketing within the system. Also, if you possess a smart card enabled finger reader, you can use the Create Loyalty Card button to create a swipe-able card for the customer to scan.

Number of Visits	59
Spent to Date	\$2740.95
Points Remaining	2641

Email Opt-In
 Text Messaging Opt-In

Create Loyalty Card

Custom

This tab may not necessarily be visible on your system:

New Customer

Basic Info More Info Marketing Custom

Friendly: Not Friendly Favorite: Edibles

The system allows you to create up to 10 custom fields to store information that we do not necessarily store currently. Creating these will be explained in greater detail [later in the chapter](#).

Purchase History

Item	Quantity
10/07/2011	
Blueberry	1.00 g
08/31/2011	
A	4.00

Print Ticket **Print History**

The Purchase History tab will display the customer's entire purchase history including items purchased and quantities. If you would like to re-print a specific ticket for a customer, simply highlight an item and click the Print Ticket button.

You can also print the customer's entire purchase history to a regular printer (as opposed to the print ticket which would print to your receipt printer) by simply clicking the Print History button.

Notes

Purchase History Notes			
Date	User	Priority	Message
07/12/2012	postgres	Normal	Normal note
07/12/2012	postgres	Popup	Very Important Note!
<input type="text"/> <input type="button" value="Priority"/> <input type="button" value="Normal"/> <input type="button" value="New"/> <input type="button" value="Save"/> <input type="button" value="Delete"/>			

Notes can be added to a customer from the above screen. To add a new note, first click the New button. Next, type in your note in the textbox seen above. Finally, you'll want to select a Priority. The options are: Normal, Important and Popup. Important and Popup notes will appear in bold. An Important note will cause the Notes tab to flash red and, if the customer is checked-in, their name will also flash. A Popup message will, as the name implies, automatically popup a screen with the note on it when the customer is selected by the user, as seen below:



Once you have selected the Priority, you may click the Save button to save the note. Highlighting a note will show you the entire message in its entirety (instead of just the first few words as shown in the list). Once highlighted, you can make changes to the note and click Save to complete those changes. Or, you may also click the Delete button to remove the note from the system.

Inserting

Once all of the necessary information has been input, a user simply needs to click on the Insert or Update button. To clear information and start a new customer, a user may click on the Clear button.

Another way to begin the process of inserting a new customer is to simply swipe their driver's license, if you have a magstripe reader attached to the computer. This will pull some of the basic information stored on the card and insert it into the appropriate fields. Once the customer is already in the system, scanning the driver's license will automatically look them up and automatically check them in, as well.

After inserting your customer, you can check them in by clicking on the Check-in button. This will then propagate the customer on the check-in screen of every terminal that is also at your location. So, for example, if a customer is checked-in at a front desk terminal, a sales clerk can simply click on their name in the check-in queue to begin a sale.

Modifying Existing Customers

Existing customers can be looked up a number of ways. The first way is to click on the Customer Lookup icon:



Once you are looking at the Customer screen, you'll notice this at the top:



In the search textbox, you can type a last name, first name, last name comma first name (Last, First), phone number or email address. You can also simply hit the Enter key to display a list of all customers. Here's what a search for the name Last yields for our example:

ID #	Name	DOB	Phone
699-504-DE36	Last, Foobar4 M	5/8/1976	303-222-
A3F-7D6-AB0B	Last, Foobar1	//	
BF6-0F8-0CA9	Last, Foobar4	//	
5B0-5A9-4ABE	Last, Foobar4	//	333-444-
148-A57-BACE	Last, Foobar2 Harold	//	
1C3-449-CFFF	Last, First Middle	//	
2AB-170-1632	Last, Foobar	//	
607-2CA-A416	Last, Foobar8 T	//	
D51-8A6-F0B9	Last, Foobar1	//	
6F4-3C7-03E0	Last, Foobar1	02/05/1979	303-222-
863-314-182E	Last, Foobar M	01/04/1980	303-222-
B0E-681-1A62	Last, Foobar2 Harold	03/06/1978	303-222-
C73-BC4-D6AC	Last, Foobar M	01/01/1964	303-444-
9CB-E9C-16C2	Last, Foobar8 T	5/8/1972	303-222-
C6F-FA7-D9AC	Lastyyy, Foobaryyy	//	

You can then double click on the person you actually wish to display.

Scanning a customer's driver's license, once it has been entered, is another (easier) way of looking up a customer. It will also automatically check them in, so no additional click is required.

If you have entered a customer's MMJ card number and your state or jurisdiction uses barcodes for the card number, you can simply scan the barcode while on the main customer screen:

External Barcode

If you don't see this on your main Customers tab, this is because you have not enabled [External Barcodes](#) and you will need to reference the previous chapter on how to enable these. Please keep in mind that use of this search method is, of course, optional.

If you are using smart cards via the loyalty system (as described later in the chapter), that is yet another way to lookup a customer.

Once a customer has been looked up, a user may edit any of the customer's details, as necessary. After any and all changes have been made, a user must click on the Update button to save the changes.

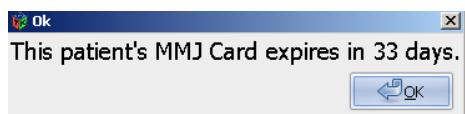
The system will automatically check-in a customer when they are first entered into the system and, additionally, every time a customer is looked up through automated means, e.g. driver's license swipe. A manual check-in can be easily initiated by simply clicking on the Check-in button once a customer has been looked up.

Check-in	
Customer	Wait
B A	242 min
Foobar10 F	0 min
Remove	

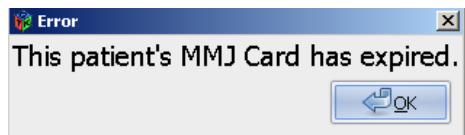
If a customer has already been checked-in at another terminal, they can simply be looked up on the current terminal by clicking on the name in the tab pictured to the left.

Clicking on Remove in the Check-in tab after selecting a customer will remove the customer from the check-in

Once you click on an existing customer through the check-in, you may notice popup windows from any notes that have been setup as a popup, without actually opening the Customer lookup screen. In addition, if you have entered specific MMJ Card information, including an expiration date, the system will inform you when that date has reached 60 days or less:



Or if it has already expired:



Removing Customers

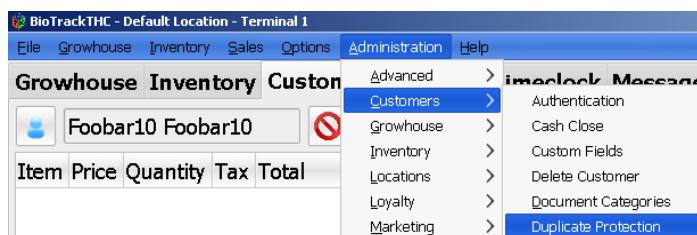
Eventually it may be necessary to remove duplicate customers from the system. Although the system contains advanced fuzzy matching capabilities that attempts to ensure upon every new customer inserted that no other similar sounding customers already exist, human error can always factor in. If there is a need to remove a duplicate customer file, simply lookup the customer file to be removed and navigate to the Toolbar to Administration, Customers, Delete Customer.



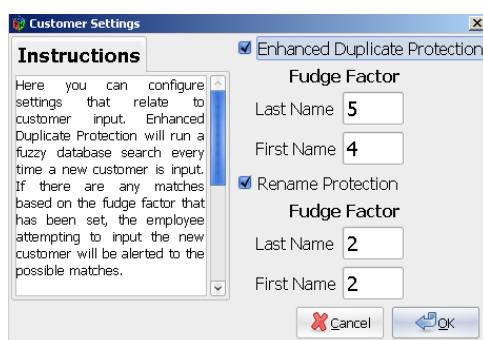
Upon confirmation of this action, the customer file in question will no longer be accessible through the system.

Duplicate Protection

You can modify the settings that are in place to prevent mistakes when entering or modifying customers. Navigate to the Toolbar and click on Administration, Customers, Duplicate Protection:



Which will bring up the following configuration screen:

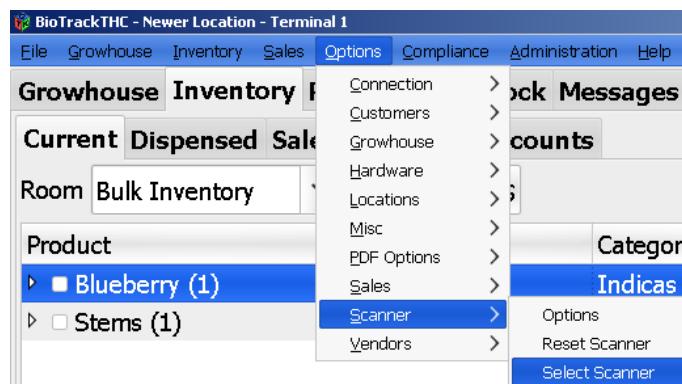


The Enhanced Duplicate Protection can be enabled or disabled as necessary. If disabled, the system will not try to prevent duplicate customer files from being created. If enabled, you can adjust the fudge factor for both the last name and first name, as necessary. Each factor must be a number 0 or greater. The greater the number, the more aggressive the protection will be. Keep in mind, you don't want the system to be too aggressive as your users will receive a large number of false positives. For example, let's assume the factor for the last name was set to 2 and the factor for the first name was set to 2. If a user enters a customer with the name: First Last, then attempts to enter another customer named: Firstt Lastt, the system would catch this because there is only a one character difference between both the first and last names. It would not catch, for example, Firstttt Lastttt, because there are four character differences in the first and last name. It's recommended to keep this option active and at the default values.

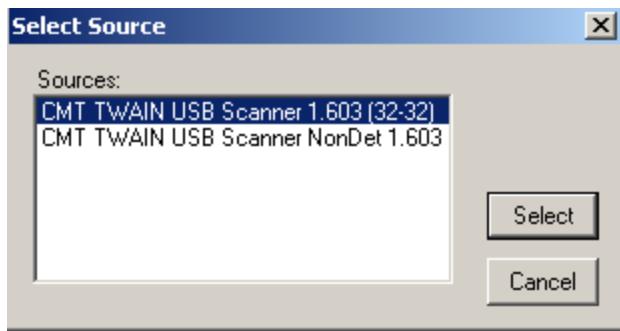
The Rename Protection, if enabled, will ensure that if a user is modifying a customer's file and accidentally clears their information, without realizing they need to actually hit the Clear button and start modifying a new customer, that the user receives a warning. This is an extremely rare event for a user to be able to accomplish, but it can happen. So it is also recommended to keep this active, as well.

Document Scanning

You may have noticed the ability to upload documents within the Customer popup. Document uploading does not require a scanner to be connected to the computer for use, but it does make things a whole lot easier. To begin, a user will first need to associate a TWAIN compliant scanner with BioTrackTHC. Most scanners produced today are TWAIN compliant, so there is little need to worry about compatibility.

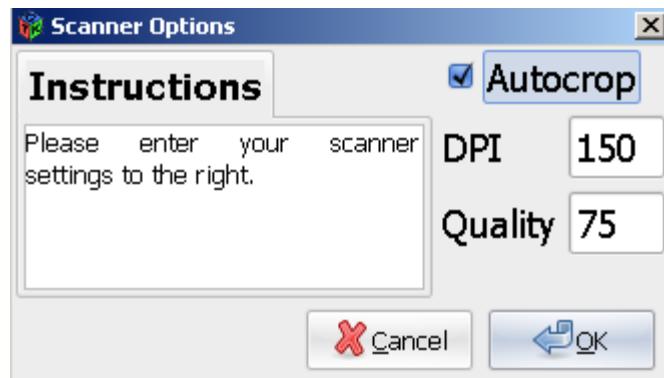


The first step in associating the scanner is to navigate to the Toolbar and click on Options, Scanner, Select Scanner.

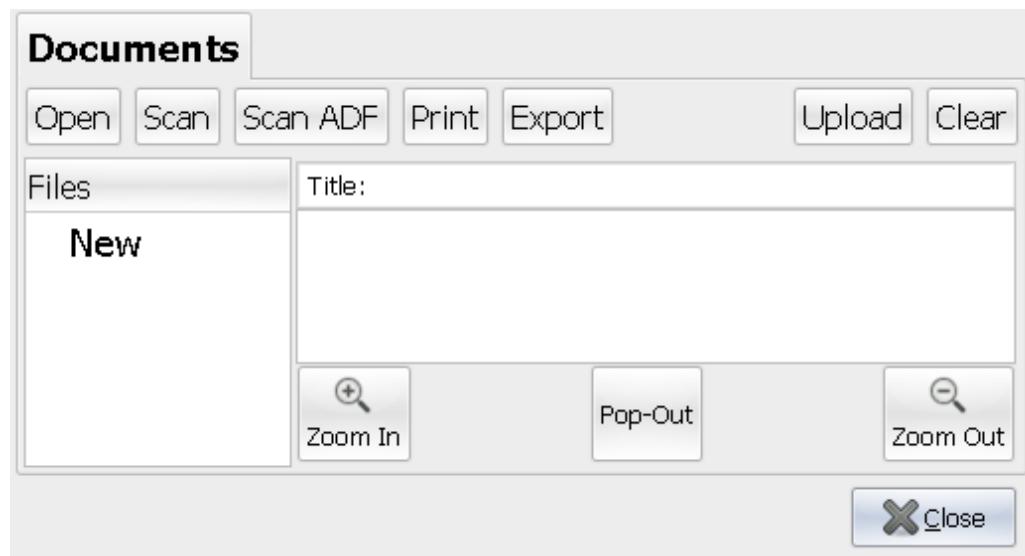


Most scanners will have two interfaces, but there may be more if multiple scanners or printers with scanning capabilities are connected. If two interfaces are shown above and one of them includes the word WIA that is the one you will want to select.

If for whatever reason there is an issue with the TWAIN interface, you can try to resolve it by navigating to the Toolbar and clicking on Options, Misc, Scanner, Reset Scanner.



By navigating the Toolbar and clicking on Options, Scanner, Options; scanning options including the DPI, quality and autocrop features can be configured. It is recommended to keep the default settings.



Initiating a scan

Once a scanner has been setup, initiating a scan is as easy as clicking on the Scan button. The system will then initiate the TWAIN system and populate the scan area with the image. If your scanner supports Automatic Document Feeder with a document feeder, you may click on Scan ADF to scan multiple documents at once.

By default, scanned documents will be given generic names. A user can change the name of a document by clicking into the Title entry box, making the necessary changes, and hitting the Enter key.

Once all of the images have been scanned, a user must click on the Upload button to upload the documents into the system. If a user does not wish to upload the documents, they may click on the Clear button and it will not upload them.

Upon upload of a file, a user may highlight the document to display it. Once displayed, a user may also use the Print button to print a copy out. Also, if at any point the document is no longer needed a user may right click on a document and click on the Delete option.

After an image has been uploaded, a user may also use the Zoom In and Zoom Out image features which allow a user to enhance the image into greater detail.

The Pop-Out button will maximize the document tab onto the screen for maximum viewing size of uploaded documents. Once maximized, a user only needs to click on Pop-Out again to restore the document tab to its original place and size.

Non-scanned documents

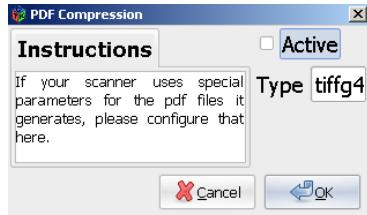
Documents that already exist on the computer, or that were acquired through another method, can also be uploaded by clicking on the Open button. This will prompt the user to select the file from local filesystem. Once selected, it will appear in the scan area.

PDF Options

If you are using a scanner that is producing PDF files that you are, subsequently, importing either by using the Open button or dragging and dropping them into the system, you may need to enable an option if your scanner uses a special type of compression. The necessity of this will be obvious if you do use PDFs and the images are not appearing correctly. You can enable this by navigating to the Toolbar and clicking on Options, PDF Options, Compression:



You'll now see the following screen:



By simply clicking Active and saving this choice by clicking OK, you will enable the system to decode one of the more popular compression methods tiffg4. If this still does not help, you may need to consult your scanner's documentation and determine which compression method it uses and enter that into the Type field. For more details, please see the [Import Documents](#) section in Chapter 2.

Document Categories

Documents are organized into categories and the available document categories will appear as tabs in the document scanning window. By default, one category will exist named Documents. The name of this category can be modified and other categories added by navigating to the Toolbar and clicking on Options, Vendors, Document Categories.

Create new document category

To create a new document category, first click on New. This will clear out the selected document category and move the cursor to the Name entry box. Now, simply type in the name of the new document category. Once you have finished, click Save. The category has now been saved and once the system is restarted the new category will appear in the document scanning area.

Update existing document category

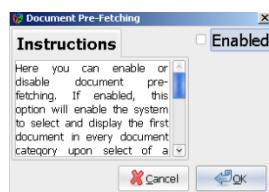
To update an existing document category, click on the down arrow to the right of the Existing Categories drop-down. This will display a list of existing categories. Once you have selected a category, its name will appear in the Name entry box. You may now modify the text in the Name entry box and, once satisfied, click Save. Once a category has been selected, you may also delete it by clicking on the Delete button. Deleting a category will make any documents already uploaded into said category inaccessible, so please be sure to use caution when deleting a document category.

Options

You can set the system to automatically pre-fetch the first document in every category when a customer is loaded for quicker viewing of recent documents. This can, however, slow down the process of loading a customer if you are on a remote connection. As such, this feature is disabled by default, but can be enabled on a terminal by terminal basis by navigating to the Toolbar and clicking on Options, Customers, Document Pre-Fetching:



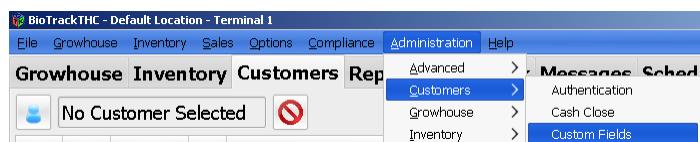
Which will bring up the following screen:



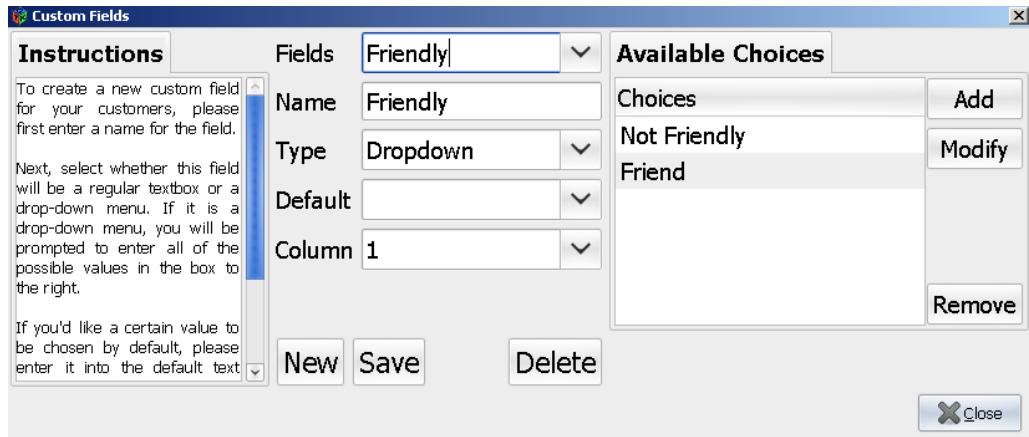
If you wish to enable the option, simply click on the Enabled checkbox and click OK to save your setting. You can always return here later and turn it off if you decide it's not for you.

Custom Fields

As was mentioned in both the [Import Customers](#) configuration section and [earlier in the chapter](#), the system allows you to create up to 10 custom fields to store any data that you wish to collect on your customers that our system does not currently store. If you imported your customers from another system and utilized the custom fields the system will already have some created for you. To begin reviewing how to create or modify existing Custom Fields, let's first navigate to the Toolbar and click on Administration, Customers, Custom Fields:



This will present the Custom Fields screen:



Creating a Custom Field

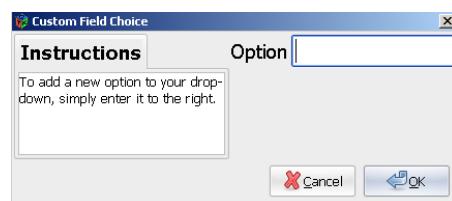
To begin, first click the New button. Next, select a Name that will be displayed to your users for this custom field.

The Type drop-down will offer you two choices: Textbox and Dropdown. Selecting Textbox will allow your users to enter any value they wish for this field, whereas Dropdown will allow you to add values to the Available Choices tab to the right and force your users to select from several pre-defined values.

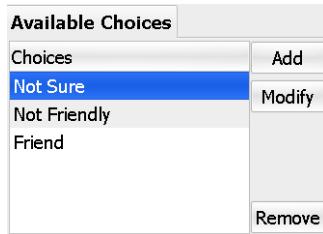
The Default box will allow you to type in a default value if your Type has been set to Textbox. Otherwise, it will allow you to select one of your Available Choices. This is optional and you do not need to set a Default value.

The Column number determines where on your screen the custom field will appear, with values ranging from 1 to 10. You can't, obviously, have two custom fields set as the same column number. When you click the New button to add a custom field the system will automatically detect the next available column number available for you.

If you have decided to use a Dropdown, you'll notice the available choices to the right can be added or removed from. To add a new option to the Available Choices, click on the Add button which will present the following popup:



All that this screen requires is for you to type in what you would like the option to appear as to the user. So, if we type in the Option as: Not Sure, our available choices will now look like:



By clicking on an already existing choice and clicking the Modify button, we can make any changes necessary to that choice.

Or, you could also click the Remove button to remove a choice from the Available Choices.

Once you have created a Custom Field to your satisfaction, you can click on the Save button to save the new field. You will need to reload your program to see the changes on the Customer lookup screen.

Modifying an Existing Custom Field

To modify an existing Custom Field, select it from the Fields drop-down at the top of the screen. Once selected, the system will populate all of the information about that Custom Field. You can easily change the Type of Custom Field, the Name of the field or the Available Choices (if the field is set to Dropdown). Once you have completed any changes, simply click the Save button to update the Custom Field. Once again, you will need to reload your program to see the changes on the Customer lookup screen.

Deleting a Custom Field

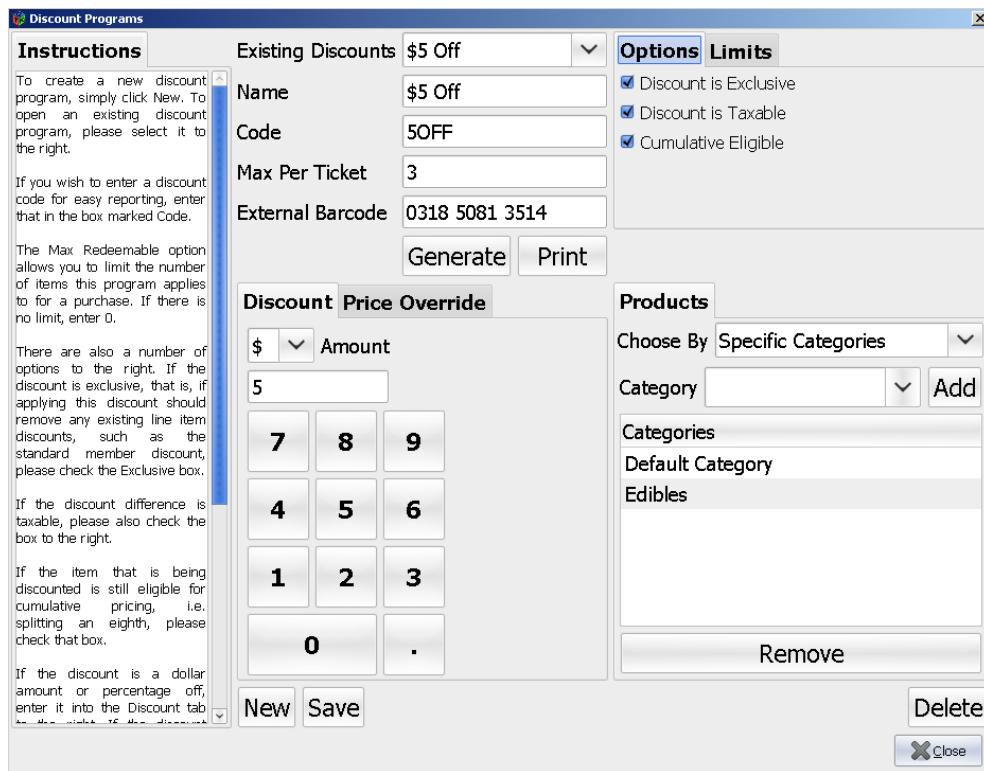
To delete a Custom Field, select it from the Fields drop-down at the top of the screen. Next, simply click the Delete button and the system will remove that Custom Field from your system. To see the changes on the Customer lookup screen, you will, of course, need to reload your program.

Discounts

Now that we've covered how to create and lookup customers; it's time to delve into the sales process. To begin, we're going to show you how to create discounts that can be used to offer discounts to your customers and track those discounts throughout the sales process. Once we cover the discount concept, we'll then dive into making an actual sale. To begin, let's navigate to the Customers tab and then click on the Discounts button:



This will bring up the Discount Programs screen:



Creating a Discount Button

To create a new discount you'll want to click the New button, think of a name and enter it into the Name textbox. This is what your sales clerks will use to identify the discount, so it should be meaningful.

The Code should be entered next and this will be a helpful shorthand in the reporting system and should be unique. In our example above, we have used the code 5OFF for our \$5 Off discount.

The Max Per Ticket is a number that can limit the number of times this discount may be used for a single ticket. For example, if we set this number to 1, they purchase two items and the salesclerk attempts to apply the discount to each item; it will only work for the first item.

The External Barcode can be used (if [External Barcodes](#) have been enabled) to print out a barcode for the discount. This can be useful for a salesclerk as, instead of navigating to the discount on their screen, they can simply scan the barcode to apply it to the ticket. Clicking Generate will generate a random 12 digit barcode that can then be printed using the Print button.

The Options tab, to the right, includes three sub-items that appear as checkboxes, they include: Discount is Exclusive, Discount is Taxable and Cumulative Eligible.

Discount is Exclusive will remove any other discounts that have been applied to an item if this discount is used. For example, if an item has a standard 10% member discount and a \$20 exclusive discount is applied to such an item, the 10% discount would be removed.

Discount is Taxable will apply tax to the entire original amount of the purchase amount. For example, if an item originally costs \$20 and the discount applied is a \$5 discount to bring the subtotal to \$15; a 10% tax on this purchase would come to \$2.00 instead of \$1.50.

Cumulative Eligible sets whether the discount can apply to items which have been added cumulatively. The concept of cumulative items will be explained in greater depth in the next section, but for now an example will do: If various items in the same category can be mixed and matched to get a better deal, i.e. 1 for 20, 2 for 30, 3 for 40 and you want the discount to be applicable in such instances, you'll want to keep Cumulative Eligible checked.

The Limits tab contains a checkbox and looks like the following:



The Limit option allows you to limit the number of times a specific customer may redeem a coupon code. If enabled, you can set the limit to X number of times per any of the following: Day(s), Week(s), Month(s), Year(s), Lifetime. In the example above, we limit the use of this coupon to 3 times a calendar month.

The Discount tab allows you to set either a static amount or percentage off by simply selecting the \$ or % from the drop-down:

You'll then want to put the dollar amount or percentage into the entry box seen above.

The Price Override tab allows you to offer a variable discount:

Discount Price Override		
Amount	Price	
1.00 g	\$4	Add
3.50 g	\$10	Modify
Remove		

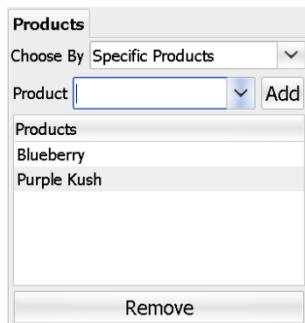
In fact, if you recall creating a Price Point Table for a product; this is exactly the same! You can create a sliding schedule as a discount button by using this method. Using the Add button allows you to add new amounts as shown above, for example, 1 for \$4. If the discount is intended for non-weighable products (e.g. edibles) and you see the grams appear in the box above, don't worry as the system will know when applying the discount that it is non-weighable. Using the Price Override is common in the following situation: Let's say you normally have a price point table that offers \$10/gram, \$30/3.5 grams, \$50/7 grams, \$100/14 grams, \$190/28 grams but you decide to create a discount button using the Price Override to run a Friday special that instead offers a similar price schedule but \$150/28 grams. Thus, the Price Override gives you that capability without changing all of your prices for just one day and then changing them back. Also, by using the Discount Program system, your reports will inform you of how many customers are redeeming the discounts which can be useful for tracking advertising, etc.

Please keep in mind a discount can either be defined as a Price Override or a static Discount amount/percentage; that is, both cannot be set.

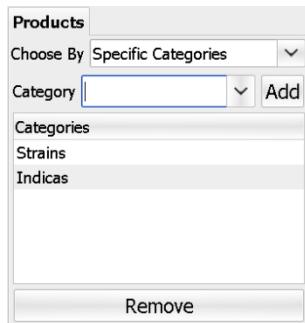
The Products tab allows you to define specific subsets of Products that the discount can only be applied to. There are four options for doing so: Product Attributes, Specific Products, Specific Categories, All Items.

Products	
Choose By	Product Attributes
<input checked="" type="checkbox"/>	Products that require Weighing
<input checked="" type="checkbox"/>	Products that are Medicated

Limiting by Product Attributes can be useful if you only want the discount applied to non-weighable items (e.g. edibles), but all of your items that you want to be eligible are not in the same category. Or, you could set it so that only items that are medicated and weighable (e.g. Bud) are eligible by checking both boxes, as seen above.



Specific Products, as the name implies, allows you to specify the specific products for which the discount can only be applied against. Simply select a Product from the drop-down and click the Add button to add it to the list. If you wish to remove a product from the list simply highlight it and click the Remove button.



Specific Categories follow a similar pattern as the Specific Products choice. You can limit the application of the discount to specific categories that are specified by selecting the Category from the drop-down and clicking the Add button. Removing them after they have been added is as easy as selecting the category and clicking the Remove button.

The final choice is All Items and, as the name implies, places no restrictions on what product(s) the discount may apply to and instead relies on the salesclerk's judgment.

Once you have completed the discount to your satisfaction, click on the Save button to add it to the database.

Modifying an Existing Discount Button

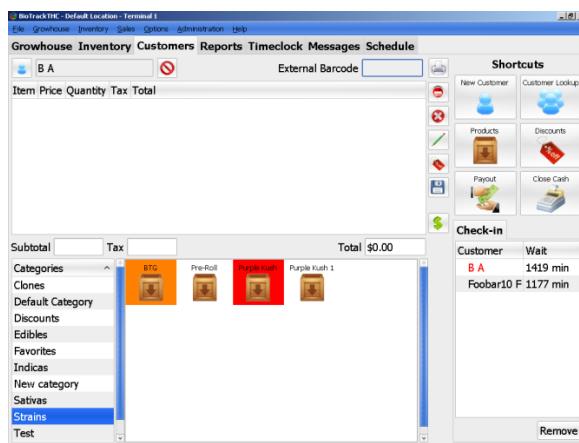
Modifying an Existing Discount begins by selecting the Discount you would like to change from the Existing Discounts drop-down at the top of the screen. Once clicked, the system will populate the current discount options on the screen. At this point, you can change discount limits, the actual discount amount, what products the discount can apply to and more. Simply make the changes to the discount you'd like to make and click the Save button. You will receive a confirmation that the discount was updated successfully.

Deleting a Discount Button

Deleting a Discount begins by selecting the Discount you would like to delete from the Existing Discounts drop-down at the top of the screen. Once clicked, the system will populate the discount on the screen. If you are sure you want to delete the discount from the system, click the Delete button. The system will ask for delete confirmation and, once approved, the discount will be removed from the system.

Making a Sale

We briefly touched on the sales screen earlier in the chapter. Now it's time to get more in-depth and follow through the process of making a sale. We're going to begin this process by making the customer B A that is already in our check-in queue the active customer by selecting them:



Adding a Weighable Item

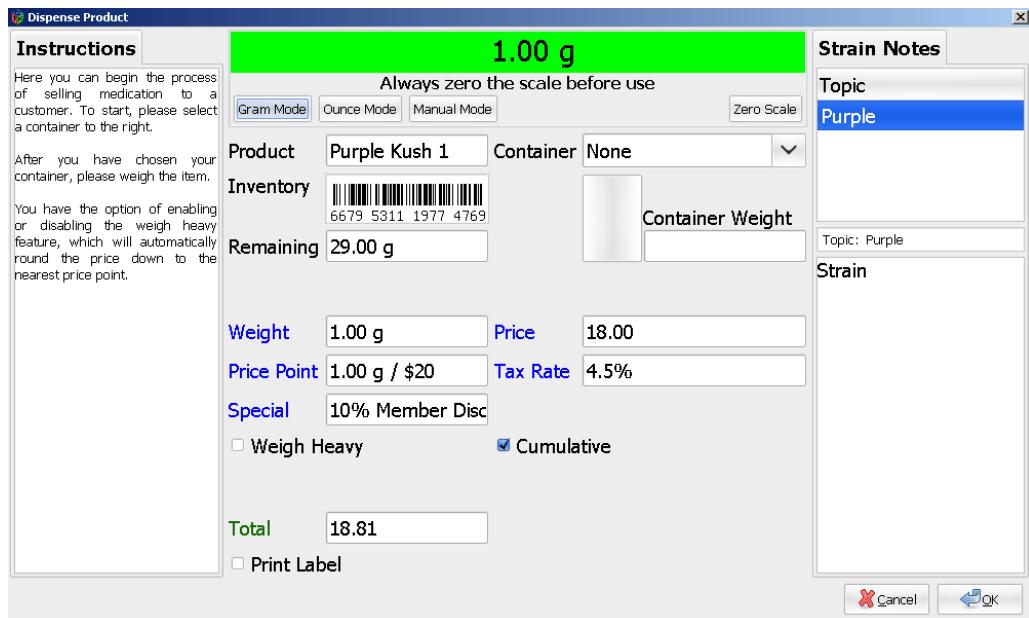
Next, we're going to click on our Strains category. As you can see, there are four products currently in that category. The one highlighted in orange indicates that that specific product is running low on inventory. The product in red indicates that product is currently out of inventory. There are options that are explained in the next section that can control how you view products, out of inventory products, etc.

Let's go ahead and select our Purple Kush 1 product by clicking on it.



Because there are multiple inventory items available for dispensing from this product, the system requires us to select which one we are dispensing from. If we had simply scanned the barcode of one of these inventory items, we could have bypassed this screen as the system would automatically know the product and barcode to pull from.

Once clicked, because the product we have chosen is a weighable item, we'll see the Budtender screen as shown below:



The Product will display the current Product you are selling.

The Inventory will display the specific barcode that you are dispensing from.

The Remaining textbox will list, after the current amount is deducted, how much of the product is remaining to sell. In this example, we've already placed one gram on the scale, so from the original 30 grams, 29 is left to sell.

The Weight textbox is where our current sale weight is displayed. This can be entered by using your scale's Integrated Mode or through the Manual Mode by simply clicking into the Weight textbox.

The Price textbox displays the current price for the weight purchased based on your Price Point Table.

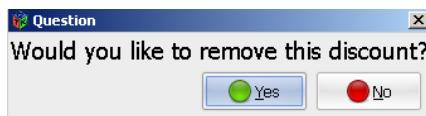
The Price Point textbox will display the current price point the customer is purchasing the product at. In the example, they are only purchasing a gram, so they are buying at our gram price. For example:

Weight	3.00 g	Price	27.00
Price Point	3.00 g / \$30	Tax Rate	4.5%

We have increased our purchase weight to 3 grams. As such, according to the price point table we created, they are now eligible for our 3 gram/\$30 price. The system automatically calculates this for the salesclerk, so no math is necessary on their part.

The Tax Rate textbox will display the tax that will be charged to the product. This could be the tax associated with the product, or, if for example the customer has been set as tax exempt, it could be a specific override they have been granted.

The Special textbox will list any discounts that will be applied to the product. In this example, we are using our member discount in percentage mode. If you are using different price point tables for your members, you will not see anything in this box. As you can see, the percentage is automatically applied on this screen so the salesclerk can know exactly what the cost will be, including the discount. By clicking into the box when a discount is already present there, the system will ask you this:



At which point you could remove the special, if necessary. Also, if the Special textbox is blank, by clicking into it you'll now see the following screen:

Discount

Instructions
To apply a discount, please select whether the discount is a straight amount, or a percentage. Then enter the corresponding number in the text box. When you have finished, please click OK.

Discounting: 30.00

Amount

Discount is Taxable

Line Item Discount

7	8	9
4	5	6
1	2	3
0	.	

Discount Reason

Cancel **OK**

This is the Instant Discount popup. You will see this popup again on the main sales screen. As you can see, it can also be activated right on the Budtender screen. The system allows you to specify a dollar amount or percentage from the drop-down and then by entering the number in the textbox. You can also select whether or not the Discount is Taxable (which determines if tax is taken against the original price or the after discount price). Finally, under the Discount Reason you can enter a reason for the instant discount that will be saved for reporting purposes. Please keep in mind that there are permissions which can limit or restrict a salesclerk's ability to perform instant discounts, how much they can be done for and more. There is also an option (discussed shortly) that can require a user to enter a discount reason every time an instant discount is used.

The Cumulative checkbox can be used if this product purchase will be combined with others to get a discounted rate. For example, let's say you offer an ounce for \$200 and a customer may mix and match from any of your strains. So, the customer decides to only purchase an eighth from 8 different strains; in other words they want to split the ounce. By checking the cumulative checkbox, it will inform the system to look for other items that are also set to cumulative and offer the combined weight price. In the following example, we add two items with the cumulative box checked:

Item	Price	Quantity	Tax	Total
▼ Purple Kush 1	10.00	1.00 g	4.5%	9.40
10% Member Discount (1.00)				
▼ Purple Kush 1	20.00	2.00 g	4.5%	18.81
10% Member Discount (2.00)				

Because each item was set cumulative, we receive the 3 gram price for both, proportionately.

The Weigh Heavy checkbox allows you to mark down an item that goes slightly over your price point, but where you want to charge the lower price. For example, here's before weighing heavy:

Weight	1.10 g	Price	19.80
Price Point	1.00 g / \$20	Tax Rate	4.5%
Special	10% Member Disc		
<input type="checkbox"/> Weigh Heavy	<input checked="" type="checkbox"/> Cumulative		

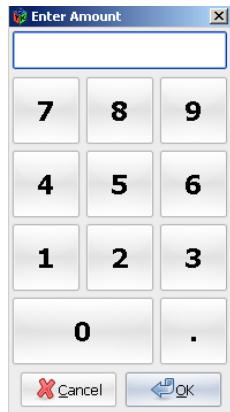
And after:

Weight	1.10 g	Price	18.00
Price Point	1.00 g / \$20	Tax Rate	4.5%
Special	10% Member Disc		
<input checked="" type="checkbox"/> Weigh Heavy	<input checked="" type="checkbox"/> Cumulative		

As you can see, the system knocked the purchase price down to the 1 gram price. The system will still withdrawal the full amount from inventory (in this example 1.1 grams), but only charge the 1 gram price.

The Weigh Heavy toggle can be configured to either drop down to the nearest price point or the nearest gram. In our example, we are using the nearest gram feature. You can read more about which method works best for you please review the Weigh Heavy option toggle that is explained later in the chapter.

The Total textbox will list the total cost of the product at the current weight. By clicking into the total box, you will popup the following:



This allows you to enter an amount, say \$40 where the system (in Integrated scale Mode) will then inform you of how much the customer can purchase, including any discounts:



Or, if you are in Manual scale Mode, the system will simply fill in the values for you:

Weight	7.65 g	Price	38.25
Price Point	7.20 g / \$40	Tax Rate	4.5%
Special	10% Member Disc		
<input type="checkbox"/> Weigh Heavy	<input checked="" type="checkbox"/> Cumulative		
Total	39.97		

As you can see, it attempted to get as close to \$40 as possible. This can be useful if a customer visits and wishes to purchase as much as they can with what they have on hand (in our example, \$40).

The Print Label checkbox controls whether or not a customer label is printed after the item is added to the ticket. Most centers will label items as they are purchased and this checkbox helps facilitate that. By default, this is checked automatically. However, there is a set of options discussed later in the chapter that can set it not to be checked by default.

You may have also noticed on the right side of our original screenshot the Strain Notes. This, too, can be shown or turned off by an option discussed later. Turning the option to display it on will allow the salesclerk to view any notes on the specific Strain of the product they are selling, e.g. the ailments it's good for, when it should be taken, etc.

For the purpose of our example, let's just go ahead and add 1 gram to our ticket and click the OK button. Our ticket will now look like this:

Item	Price	Quantity	Tax	Total
▼ Purple Kush 1	20.00	1.00 g	4.5%	18.81
10% Member Discount (2.00)				

Subtotal	\$18.00	Tax	\$0.81	Total	\$18.81
----------	---------	-----	--------	-------	---------

As you can see, the Subtotal, Tax, and Total fields will keep a running tally as we add or subtract items from the ticket.

Adding a Non-Weighable Item

Now we're going to add a non-weighable item; in this case, one of our Pre-Roll items. After clicking on the product, we'll be looking at the following screen:



By default, the Quantity field will be set to 1. You can click into the box to enter a different amount, if you wish. The cumulative checkbox works in the manner as it does for the weighable items. It will search for other non-weighable items that have been set to cumulative if they are mixing and matching items that have some sort of special price point table setup (e.g. 1 for \$5, 2 for \$7, etc.). The Print Label checkbox, if checked, will print a customer label after the item is added to the ticket.

To continue with this example, we will click OK to add 1 Pre-Roll to our ticket. Now our ticket will look like the following:

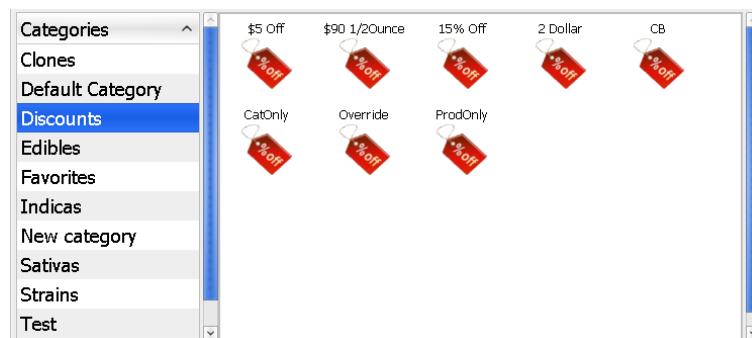
The screenshot shows a POS system interface with a ticket summary. The ticket details are as follows:

Item	Price	Quantity	Tax	Total
Purple Kush 1	20.00	1.00 g	4.5%	18.81
10% Member Discount (2.00)				
Pre-Roll	5.00	1	4.5%	4.70
10% Member Discount (0.50)				

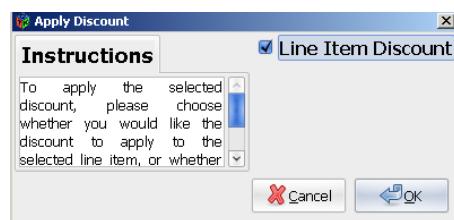
Below the ticket summary, there are buttons for Subtotal (\$22.50), Tax (\$1.01), and Total (\$23.51). To the right of the ticket area is a vertical toolbar with icons for printer, cancel, delete, edit, receipt, save, and cash.

Adding a Discount

Now, let's go ahead and add our \$5 discount to one of the items, specifically, we're going to add it to the Purple Kush 1 purchase. So, first, let's highlight the Purple Kush 1 line item. Then, let's navigate to our Categories on the bottom left hand corner of the screen and click on the Discounts.



This special “category” will list all of our currently active discounts. Next, we'll click on the \$5 Off button which will bring up the confirmation screen:



If we had not selected a line item, the system would have automatically assumed that the discount should be applied to the entire ticket. Likewise, on this screen, unchecking the Line Item Discount checkbox will apply the discount to the entire ticket. 99 times out of 100 you're going to want to apply discounts line item. So do make sure that you select an item before clicking on the discount button.

After we click OK to add the discount, our ticket now looks like the following:

External Barcode				
Item	Price	Quantity	Tax	Total
Purple Kush 1	20.00	1.00 g	4.5%	15.90
\$5 Off	(5.00)			
Pre-Roll	5.00	1	4.5%	4.70
10% Member Discount (0.50)				
Subtotal	\$19.50		Tax	\$1.10
				Total \$20.60

As you can see, because our \$5 Off discount was set to exclusive, it removed the 10% Member Discount and replaced it with our \$5 discount.

Shortcuts

You may have also noticed that there are a number of shortcut buttons to the right of the ticket. If at any time we've made a mistake, we can correct that mistake by left clicking (or on a touch screen, simply highlighting) the item we wish to remove and then clicking on this button:



Or, if we want to clear the ticket entirely, we would use this button:



We can edit an item by either double clicking on it or by simply highlighting it and clicking this button:



If you find that a discount is necessary but there is no currently defined discount button, you can use the instant discount feature by clicking on this button:



This will present the Instant Discount screen, that was [discussed earlier](#) when adding a weighable item. The same rules apply for an Instant Discount as a Discount Button; most of the time you'll want to highlight the item to be discounted before clicking on it.



This button will allow you to save the current customer's ticket for a later point in time. It will not only save the ticket but remove them as the active customer so that you can then move onto the next customer. Many centers will also use this as a pre-order feature where they prepare the ticket for a customer who has already called in and simply have the order prepared and the ticket ready for check-out. The ticket will reappear as soon as the customer is looked up once more.



The Print button will re-print (or print for the first time if you chose not to print) the label of the selected item. So, if we selected our Purple Kush 1 line item and clicked on the Print button that customer label would be sent to our label printer.



Finally, the dollar sign button will bring you to the payment screen which will, depending on your locality, look like one of the following:

A screenshot of a payment interface for the United States. It features a numeric keypad on the left with buttons for 7, 8, 9, 4, 5, 6, 1, 2, 3, 0, and ., along with 'Clear' and 'Tendered' buttons. To the right is a 'Remaining' amount of 20.60. Below the keypad are buttons for Cash, Credit, Check, Gift Card, and Account. At the bottom are Done, Cancel, Exact Change, and Total Due: 20.60 buttons. Below these are icons for US currency bills and coins.

United States

A screenshot of a payment interface for Canada. The layout is identical to the US version, featuring a numeric keypad, a 'Remaining' amount of 20.60, and buttons for Cash, Credit, Check, Gift Card, and Account. At the bottom are Done, Cancel, Exact Change, and Total Due: 20.60 buttons. Below these are icons for Canadian currency bills and coins.

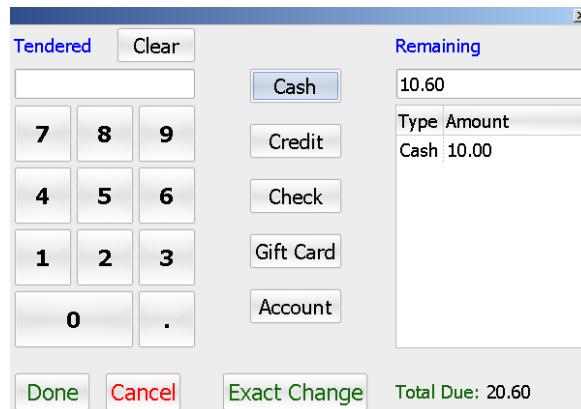
Canada

Payment Processing

You can add a payment to the ticket a number of ways. The first way is to use the keypad to the left (preferable for touch screens) to enter the exact amount of the

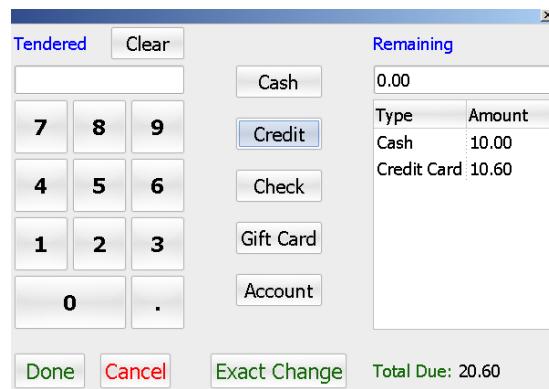
payment. These numbers will then appear in the Tendered textbox. You may also simply use the keyboard to type in an amount, as well. The dollar and coin icons at the bottom of the screen can also be used to accumulate the amount. So, for example, if you click on a 5 and two 1's the Tendered textbox will read as 7.00.

You can also add multiple payments. For example, if the customer pays with \$10.00 cash you would enter 10.00 into the system then click the Cash button:



As you can see, the system will add it to the payment list and update the amount that is still outstanding. If you happen to make a mistake, simply double clicking on the payment (or double tapping on a touch screen) will remove it from the payment list.

Now, at this point, let's say the customer is choosing to pay the rest on a credit card. We can either punch in 10.60 and click the Credit button:

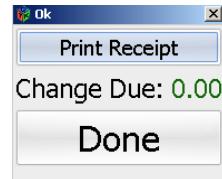


Or, we can simply hit the Credit button without entering an amount and it will automatically add the remaining balance and close the ticket. By doing it the manual way as mentioned above, you'll still need to click the Done button to proceed.

You don't need to have multiple payment methods to use the shortcut method, either. If the customer was paying the entire bill on credit; simply clicking the Credit button would have processed the entire amount outstanding. Or, if the customer was paying with cash and they gave the salesclerk exact change; clicking the Exact Change button

would perform the same function for Cash. Any of the other buttons will require you to enter an amount.

Once you have entered the payment amount(s) and they are processed via the automated means mentioned above or by clicking the Done button, the system will (if you have enabled the setting) automatically print a receipt and present the following screen:



Clicking on the Print Receipt button will allow you to print additional copies of the receipt, if you wish.

The Change Due will inform the salesclerk of the change due to the customer, if any. Once you have finished, you may click the Done button to return to the main sales screen. You will notice that the customer is no longer active and has been removed from the check-in queue automatically, as well.

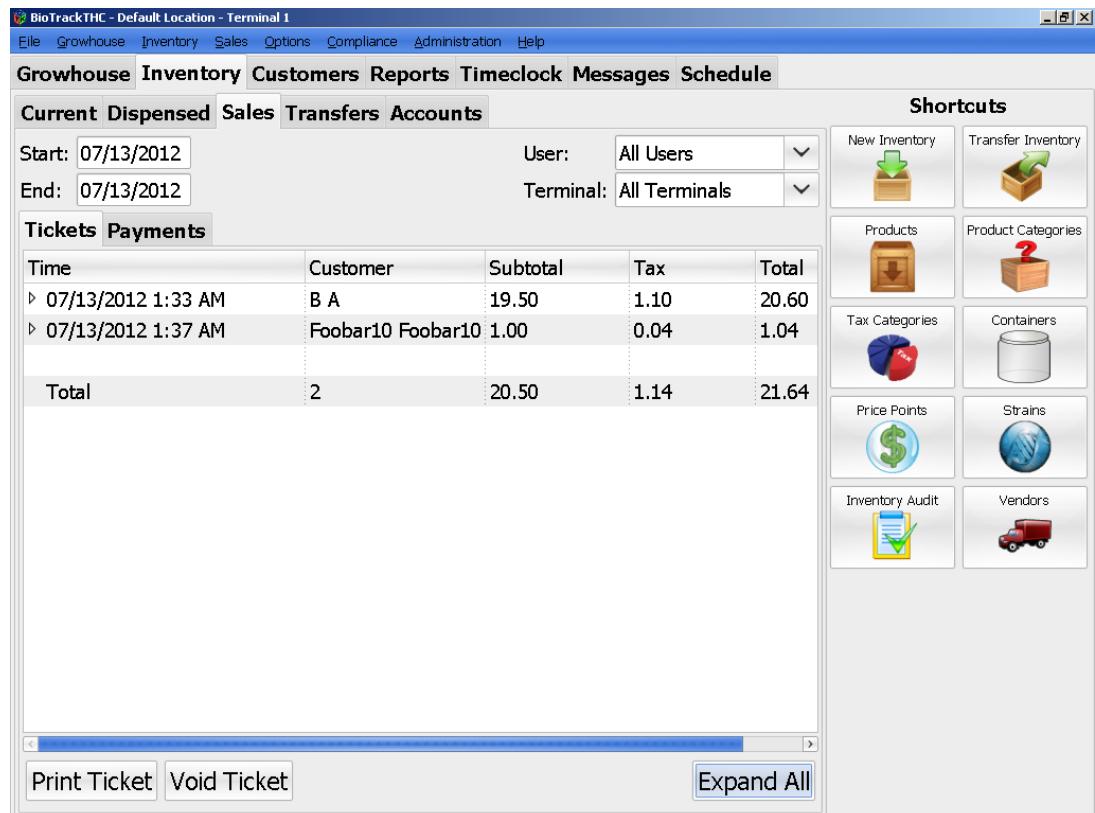
Cash Drawer

As described in Chapter 2, your [receipt printer](#) or [manual cash drawer code](#) should already be set to automatically pop your cash drawer upon the completion of a sale. Additionally, however, if you have set the manual cash drawer code you can also pop the drawer manually at any time by navigating to the Toolbar and clicking Sales, Pop Cash Drawer:



Reviewing Sales

Once a sale has been made, you may find yourself wanting to review today's (or any day's) sales. To do so, we're going to navigate to the Inventory tab, and then click on the Sales sub-tab as seen in the following screenshot:



By default, the Sales tab will display all of the current day's transactions. The Start and End date textboxes control this and you can change the date (or date range) by clicking into the textbox and selecting the new date from the calendar popup.

The User drop-down allows you to filter the sales for the selected time period by the salesclerk who made the sale.

The Terminal drop-down allows you to filter the sales for the selected time period by the terminal where the sale was made.

The Tickets tab will display a summary of all of the tickets for the selected time period. By default, it will simply show the date and time of the transaction, the customer who made the purchase, the subtotal, tax and total of the purchase.

Start: 07/13/2012	User: All Users			
End: 07/13/2012	Terminal: All Terminals			
Tickets	Payments			
me	Customer			
07/13/2012 1:33 AM				
Item	Quantity	Price	Tax	Total
▼ Purple Kush 1	1.00g	20.00	4.5%	1
\$5 Off		(5.00)		
▼ Pre-Roll	1.00	5.00	4.5%	4
10% Member Discount		(0.50)		
07/13/2012 1:37 AM				
Foobar10	Foobar10	1.00	0.04	1.04
Item	Quantity	Price	Tax	Total
Purple Kush 3	1.00	1.00	4.5%	1
Total	2	20.50	1.14	21.64

Print Ticket **Void Ticket** **Collapse All**

As seen above, by clicking on the Expand All button we can look at full details of each customer's purchase including the specific items, quantities and individual prices including discounts.

Reprint a Receipt

By highlighting a specific ticket you can easily re-print the receipt for a customer by clicking on the Print Ticket button.

Voiding a Sale

You can also highlight a specific ticket on the Tickets screen and void it by simply clicking on the Void Ticket button. The system will prompt you for a reason:



If you find yourself unable to void a ticket because of insufficient permissions, you may need to contact your administrator or a manager to complete the void. Also, note that once a sale is voided, an audit record is created of the voided ticket.

Refunding a Sale

To refund a sale, you can either scan the barcode on the customer's receipt while on the Customers tab or you can navigate to the Payments sub-tab:

Payments			
Time	Customer	Method	Amount
07/13/2012 1:33 AM	B A	Credit Card	10.60
07/13/2012 1:33 AM	B A	Cash	10.00
		Total	Credit Card 10.60
		Total	Cash 10.00

Refund Modify

Next, highlight the payment associated with a sale that you wish to refund and click the Refund button:

Refund

Instructions		Items					
		Product	Quantity	Price	Tax	Total	Restock
<small>To process a refund, please select the items the customer is returning to the right. If you wish to restock any of the items, please check the box under the heading Restock.</small>		<input type="checkbox"/> Pre-Roll	1	4.50	0.20	4.70	<input type="checkbox"/> No
		<input type="checkbox"/> Purple Kush	1.00	15.00	0.90	15.90	<input type="checkbox"/> No
<small>The total amount of the refund will appear in the Total box below.</small>							
<small>The refund method will also appear in the dropdown to the right if there were multiple payment methods for the sale, you may select which method you would like to return the selected items to.</small>							
<small>When you are ready to process the refund, please click OK.</small>							
Payments							
Method	Amount						
Cash	10.00						
Credit Card	10.60						
Total							
		Method: <input type="button" value="Cash"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>					

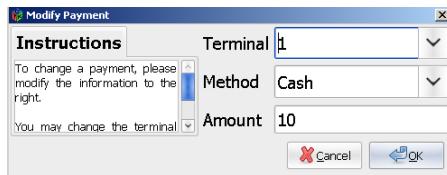
By checking off items, the refund price will automatically appear in the Total textbox. After checking an item, you have the option to restock in into your inventory by checking the box in the Restock column, which will then change from a No to a Yes.

The method drop-down allows you to select how the customer will be refunded, up to the amount they originally used for that method. For example, if in the above example where two payment methods we decided to refund the entire ticket, leaving the method to Cash will tell the system to refund the original \$10 and put the rest back onto Credit.

Once you have selected the items you wish to refund click the OK button to proceed.

Modifying a Payment

You may find that, during the course of business, a payment method was accidentally set as cash instead of credit or vice versa. To modify this, click on the payment you wish to correct and then click on the Modify button. For example, if we click on the \$10 cash payment shown in the previous example:

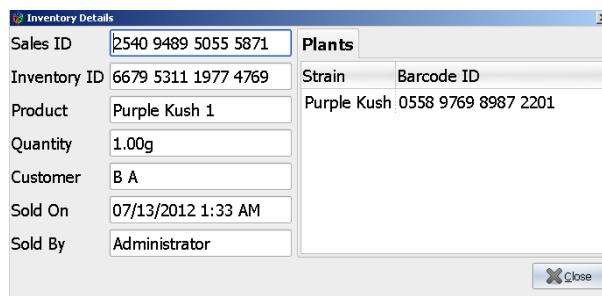


As you can see, simply selecting a new Method in the drop-down allows us to change the payment method (Cash, Credit, etc.). But, in addition, we can also alter the amount by entering a different value. Or, if we wanted the sale to reflect the sale on a different Terminal we could click on the Terminal drop-down and modify that, as well. Once you have made the necessary modifications, click the OK button to proceed with the changes.

Reviewing Quantities

Item	Quantity
Pre-Roll	1.00
Purple Kush 1	1.00g

The Dispensed tab can be used to view at a glance the quantity of items that have been sold throughout a selected time period (by default, the current day). The date range can be changed simply by clicking into the Start or End textboxes and selecting the appropriate date from the calendar. By clicking the Expand All button you can also see a list of the customers who purchased the item and how much. After expanding, you can double click on the specific purchase amount or highlight it and click the Details button. This will bring up a screen similar to the following:



It will display various details about the purchase including the receipt barcode (Sales ID), the Inventory ID of the item they purchased from, the Product's name and quantity purchased, the name of the customer who purchased it, the sales clerk that made the sale and the exact date and time of the sale. In addition, if the item was

derived from a plant (or plants); the system will display a list of those plants to the right.

Sales Options

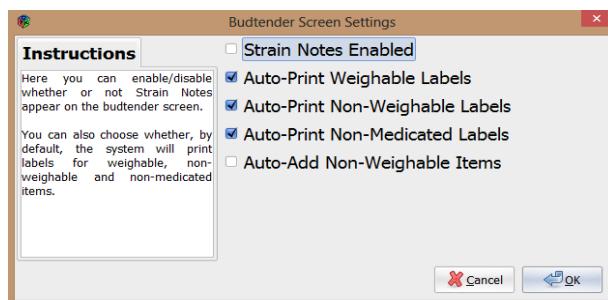
The Sales screen can be customized in a number of ways and miscellaneous configuration options control how sales are handled.

Budtender Screen

To begin customizing the Budtender Screen, navigate to the Toolbar and click on Options, Sales, Budtender Screen:



The Budtender Screen Settings will look like the following:



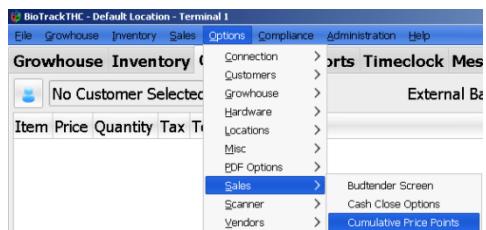
Enabling or disabling the Strain Notes will show or hide the Strain Notes on the weigh screen when a salesclerk is weighing out a product.

You can also control whether Weighable (e.g. Bud), Non-Weighable (e.g. Edibles) and Non-Medicated (e.g. Pipe) products automatically get a customer label printed when they are added to the sales ticket.

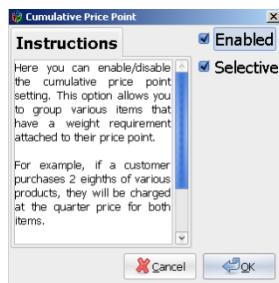
Clicking OK will save the settings and, keep in mind, these settings can be set on a terminal by terminal basis.

Cumulative Price Points

As explained [earlier](#) in the chapter, weighable products can be added up cumulatively to allow a customer to mix and match items. We can customize this behavior to a degree by navigating to the Toolbar and clicking on Options, Sales, Cumulative Price Points:



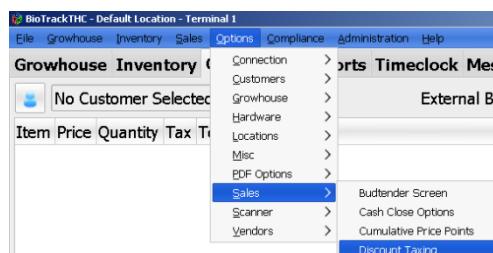
Which presents the Cumulative Price Point Settings screen:



The Enabled option determines whether or not the Cumulative checkbox is checked, by default, when making a sale. Regardless of this setting, it can still be enabled or disabled as necessary by the salesclerk. The Selective checkbox sets your sales system up such that it only allows Cumulative to affect items which have the same price point. In other words, a \$10/gram item could not be cumulative applied with an \$8/gram item.

Discount Taxing

Taxes will, by default, be set to only withdrawal from the after discount total unless otherwise set by a discount button. For example, this means that for a \$20 sale with a \$5 discount, a 10% tax would come to \$1.50 if discount taxing was disabled. If this option were enabled, the tax would come to \$2.00 instead. To enable or disable this setting, navigate to the Toolbar and click on Options, Sales, Discount Taxing:

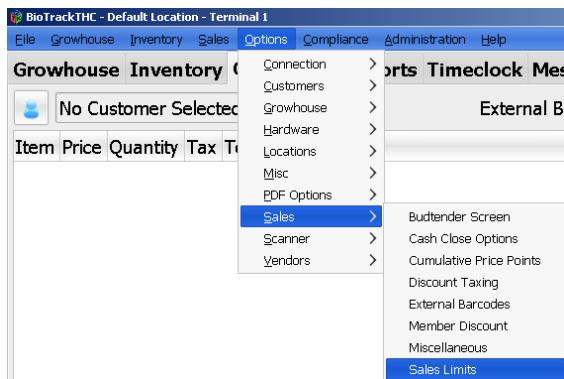


You can simply enable or disable this by checking the Enabled box and clicking OK:

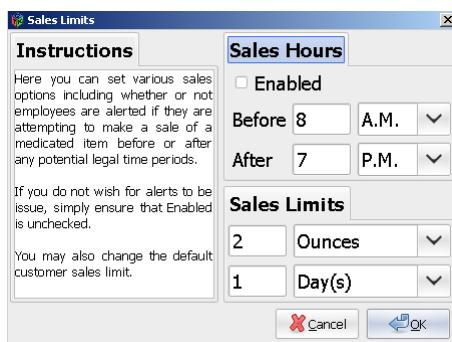


Sales Limits

The system can be configured to limit your sales clerks to limit the time and total amount customers can purchase. To begin, navigate to the Toolbar and click on Options, Sales, Sales Limits:



The Sales Limits screen will look like the following:



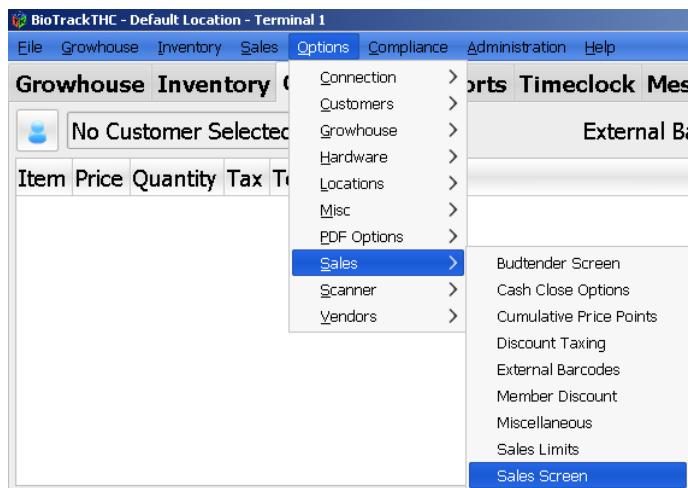
By clicking the Enabled checkbox under the Sales Hours tab, you can warn your salesclerks if they attempt to make a sale before or after the hours you designate.

The Sales Limits tab allows you to limit a customer to purchase to a certain amount over a certain number of days. In the example above, we have set a limit of 2 ounces per day. You can change that, as necessary by entering your own limit (e.g. 2 ounces per 14 days).

Simply click the OK button to save your changes.

List View

The system uses an icon view by default, but, this can be configured and changed. To begin, navigate to the Toolbar and click on Options, Sales, Sales Screen:



The Sales Screen Settings will look like this:

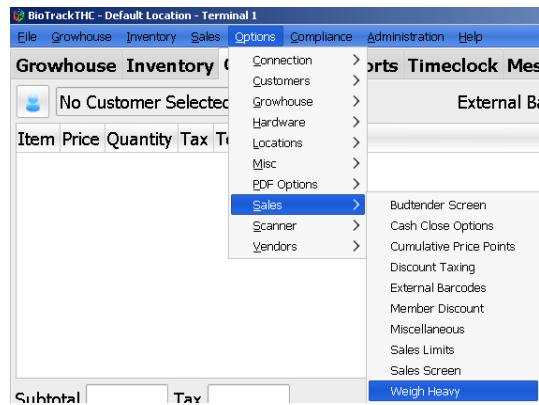


These can be configured on a terminal by terminal basis. You can change the number of icons that appear, per row, by entering a new number in the Per Row textbox. Or, you can switch the system to List View and simply view a list of products instead of icons. Once you have made any changes, click OK to save them. If you are switching view formats, you'll need to reload the program. Here's a preview of what List View would look like:

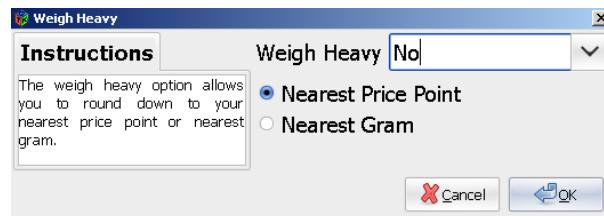
Categories	Product	Remaining
Default Category	Blueberry	22.00g
Discounts	Blueberry Shake	19.95g
Edibles	White Widow	32.00g
Favorites		
Indicas		
New category		
Sativas		
Strains		
Test		
Tinctures		

Weigh Heavy

You can configure how your terminal weighs heavy by navigating to the Toolbar and clicking on Options, Sales, Weigh Heavy:



The Weigh Heavy options screen will look like this:

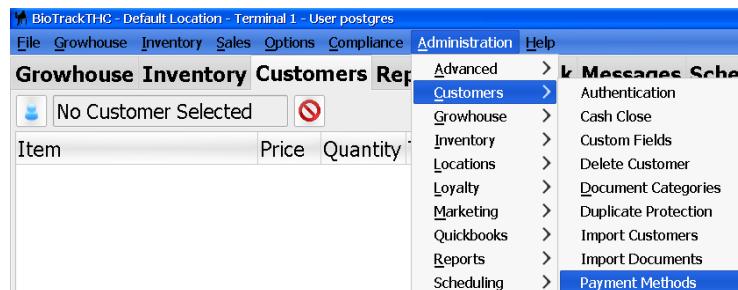


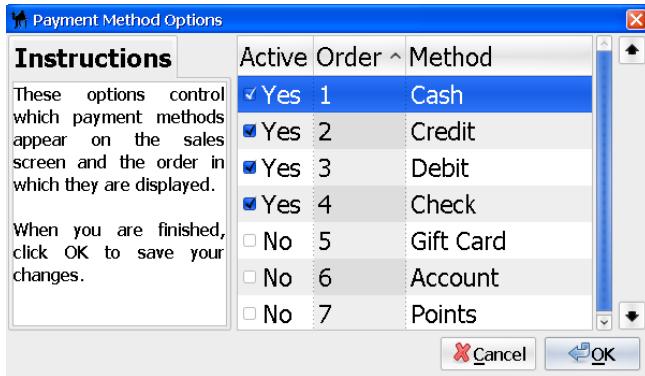
The Weigh Heavy drop-down determines whether weigh heavy is turned on by default for the terminal. Most centers will want to keep this set to No and allow their sales clerks to use it only as necessary.

The Weigh Heavy option can be set to round either to the Nearest Price Point or the Nearest Gram. For example, let's say a price point has been setup as 3.5 grams for \$40. If a customer purchases 4.2 grams and the salesclerk chooses to weigh heavy, one of two things can happen: If your system is set to Nearest Price Point the purchase will be rounded down to the 3.5 gram price of \$40 whereas if your system has been set to Nearest Gram the purchase would be rounded down to a 4.0 gram price, or approximately \$45. Most centers will set this option to Nearest Gram, but, depending on how your price points are configured you may want the Nearest Price Point.

Payment Options

You can configure the payment options that appear on the payment screen which was covered [previously](#) in the chapter. You can configure the Payment Options by navigating the Toolbar and clicking on Administration, Customers, Payment Methods:

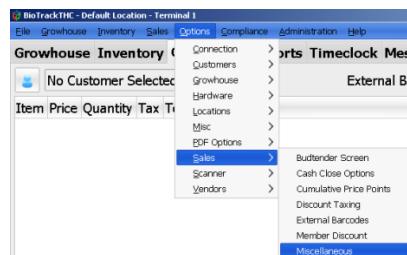




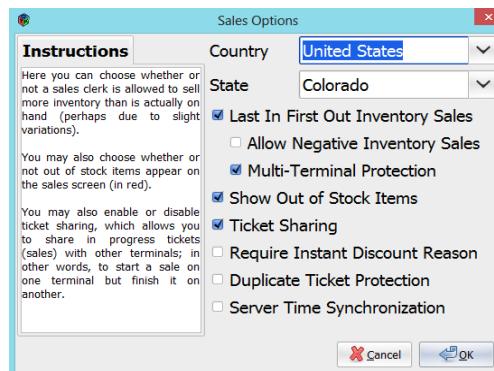
The two options that are mandatory are Cash and Credit. You can enable or disable additional payment options by clicking on the checkbox in the Active column. If the payment option is active it will have a check next to it and will read Yes. You can also re-arrange the order the options appear on the screen by highlighting an option (for example, Cash as shown above) and clicking on the up or down arrows to the right of the screen. Once you have completed any changes, click on the OK button to save them. These options are per location, so you may configure different payment methods for different locations.

Miscellaneous

There are a few miscellaneous sales options that are important to consider; a few of which were already covered in an [earlier section](#). We will cover the rest of those options now by navigating to the Toolbar and clicking on Options, Sales, Miscellaneous:



The Miscellaneous Sales Options screen will then popup:



The reasons and benefits for setting your correct Country and State were previously covered in [Chapter 2](#).

The Allow Negative Inventory Sales option allows you to go over what the system is reporting in your inventory. Use of this option is not recommended, but some centers do enable it for cases where the reported weight may be off by very minor amounts (+/- 0.1 gram) and simply want the ease of use in such a case.

The Show Out of Stock Items option will display in red (for Icon View mode) if a product currently has no inventory in stock. If this option is disabled, products that are out of inventory will not be displayed on the sales screen for a salesclerk.

The Ticket Sharing option allows a ticket to be shared between terminals. That is, it allows a salesclerk that is handling a sale on one terminal that, for whatever reason, needs to hand off the sale to another salesclerk on another terminal. It does so by simply tying their ticket data to the check-in queue. So once another salesclerk clicks on the customer in the check-in queue, their existing ticket already created will simply appear. Use of this option is recommended.

The Require Instant Discount Reason option is recommended and it ensures that when a salesclerk offers a customer an instant discount (that is, does not use one that has already been pre-defined with a coupon code, etc.) must provide the system with a reason as to why they are offering the discount. This reason is then later accessible through the reporting system.

Duplicate Ticket Protection is an option that can help prevent multiple salesclerks from accidentally processing the same ticket. When a sale is made, the system will perform a check to ensure an identical order by the same customer has not already been processed on the same day. Use of this option is recommended in most cases.

Server Time Synchronization will automatically synchronize the time on the terminal to the time provided by the National Institute of Standards and Technology (the official U.S. time).

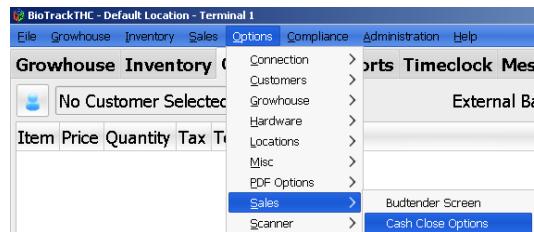
These options are on a terminal by terminal basis. Once you are finished making changes simply click OK to save them.

Tracking Your Cash

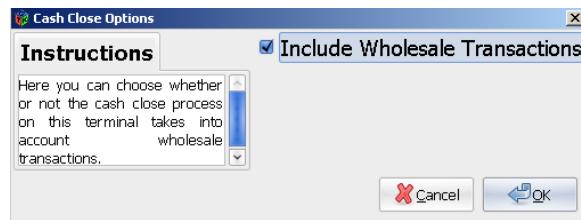
Cash transactions are linked to the terminal they were made from. So, sales on one terminal will track separately from another terminal allowing both terminals to have separate cash drawers. The system also has the capability to track wholesale transactions to a specific terminal, as well.

Include Wholesale Transactions

To include wholesale transactions, navigate to the Toolbar and click on Options, Sales, Cash Close Options:



The options screen is fairly straightforward:



Simply enable or disable this option as necessary to include wholesale transactions against your cash closing procedures. Once you have made your changes click OK to save them.

Payouts

If, during the course of the day, money is drawn from a register for office supplies, paper, pens, etc., you can make a note of this in the system so that it knows to expect a lesser amount when closing out the cash. You may do this by navigating to the Customers tab and clicking on the Payout button:



The use of the Payout screen should be pretty straightforward. The system will prompt you to enter an amount to be withdrawn and a reason for the withdrawal. The system will automatically apply the Payout against the current terminal. Once this information has been input simply click the OK button to proceed.

Cash Close

Once the end of day has been reached, you can close out the cash for that day. To begin, navigate to the Customers tab and click on the Cash Close button:



Here is an example of a Cash Close:

Time	Customer	Amount
03/07/2012 4:14 PM	FOOBAR9 FOOBAR9	13.44
03/07/2012 4:16 PM	A B	26.87
03/07/2012 5:41 PM	FOOBAR9 FOOBAR9	33.59
03/07/2012 5:41 PM	A B	20.16
03/07/2012 5:45 PM	A B	47.02
03/07/2012 7:15 PM	A B	40.31

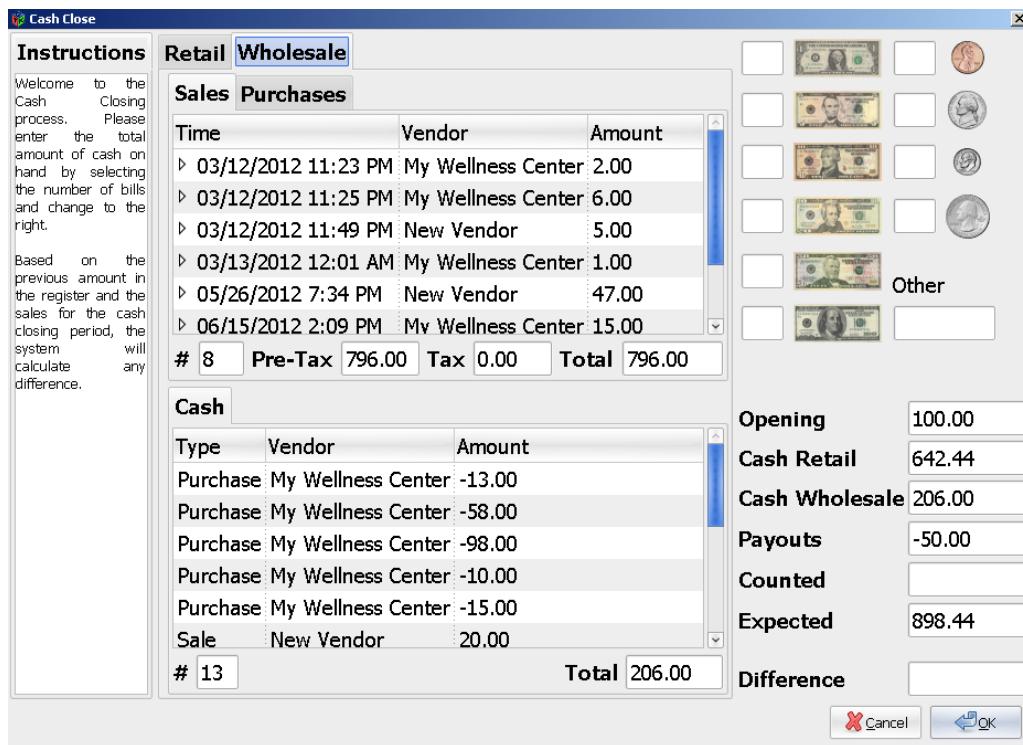
Customer	Amount
FOOBAR9 FOOBAR9	13.44
A B	26.87
A B	47.02
A B	62.70
A B	62.70
A B	41.06

At the top of the screen are two tabs: Retail and Wholesale. If you have not enabled the option to include Wholesale transactions you will not see this tab.

The Retail tab will have a number of sub-tabs; the first of which being the Sales tab. This tab will display all of the sales tickets since the cash was last closed. It will display the date and time, customer and amounts of the transactions. Clicking on the arrow will expand a transaction and display the individual items that were purchased. It will list at the bottom of the tab the number of transactions, pre-tax, tax and total amounts.

The second set of tabs will display all of the payment methods received. Each tab will then display the customers and amounts of the payments received. At the bottom of each tab it will list the total number of payments received and the total amount.

If Wholesale has been enabled then clicking on the Wholesale tab will show something similar to the following:



As you can see, for Wholesale, it will track both Sales and Purchases. Just as it does for Retail, the number of transactions and totals are tracked. And, as was also seen with Retail, it will list all of the payment methods in a second set of tabs with the transaction totals and amounts.

These views offer a way to reconcile any differences in the cash on hand and what the system is expecting.

The dollar bills and coins are where the salesclerk will enter the total number of each amount counted. You can simply enter a total number in each field or you can also click the button represented by the amount (e.g. clicking on the dollar bill) and the system will add 1 of that amount to the total count. That is, clicking on the dollar bill five times will then show a 5 next to the dollar bill. You can also enter a total amount of Other bills or coins collected. For example, you could enter 4 into the Other box if two 2 dollar bills were collected.

As you can see to the right, the system will show you a tally of the Opening amount. This default opening balance can be set or modified on the Terminals screen as referenced in the Terminals screen configuration in [Chapter 2](#).

The Cash Retail (and potentially Cash Wholesale) will list the total receipts in cash.

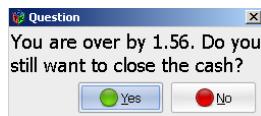
The Payouts will subtract payouts, if any were processed.

Counted will tabulate the total from all of the bills and coins that were entered in the boxes above.

The Expected box will list the cash on hand that she be there taking into account the Opening + Retail (+ Wholesale if enabled) – Payouts.

The Difference textbox will tell the salesclerk how much over or under (if they are at all) based on how much was Expected – how much was counted.

After counting, a salesclerk can click the OK button to complete the cash close procedure. If they are over or under, the system will confirm their decision like so:

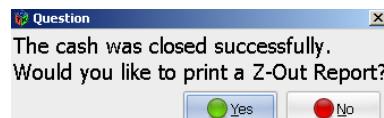


Once a user clicks OK, the system will prompt for the deposit amount:



If a cash close has a total cash on hand of 900.00 with an opening balance of 100.00, the system will attempt to match the deposit so that it leaves exactly the original opening balance. That is, it helps the salesclerk ensure the original balance is returned to the opening balance. A salesclerk can override this, however, by simply entering a different deposit amount. For example, if we changed the deposit amount above to 850.00, the opening balance for the next day would be 50.00.

After selecting the deposit amount and clicking OK, the system will process the cash close and prompt the user to print Z-Out Report:



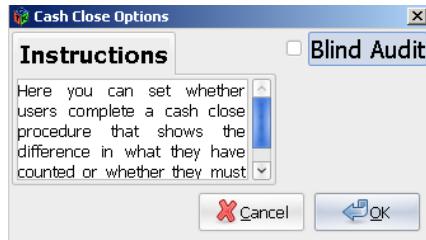
If the user chooses to press Yes, a Z-Out Report will be printed. If they do not choose to print a report right now, it can always be printed at a later point through the Reports tab.

Blind Audit

An administrator can configure the Cash Close procedure to be blind, that is, it will not report to the salesclerk how much total on hand they should have nor will it inform them of any difference in the total they count. Some centers will utilize this feature as a sort of checks and balances for their employees. To enable (or disable), navigate to the Toolbar and click on Administration, Customers, Cash Close:



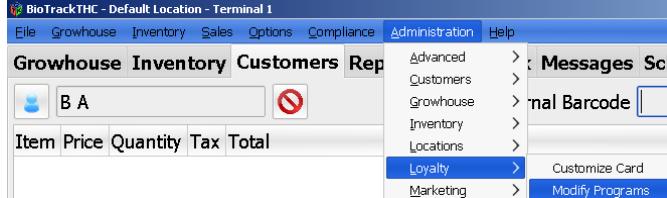
Simply check the Blind Audit checkbox to enable this feature:



When you have made your choice, click OK to save your settings.

Loyalty Programs

Loyalty Programs can be setup to automatically reward your members who either visit often or spend a certain amount of money at your center. To begin customizing these programs, navigate to the Toolbar and click on Administration, Loyalty, Modify Programs:



This will present the Loyalty Programs screen:

This is a configuration dialog box for a loyalty program named 'Amount2k'. The 'Existing Programs' dropdown shows 'Amount2k'. The main settings include:

- Name:** Amount2k, **Code:** AMT2K
- Based On:** Amount Spent, **Frequency:** Recurring
- Amount:** 2000.00, **Max Redeemable:** 0
- Discount is Taxable:** Unchecked
- Cumulative Eligible:** Unchecked
- Members Only:** Checked

The 'Discount' tab shows a numeric keypad with values 1 through 9, 0, and a decimal point. The 'Price Override' tab shows a dropdown menu set to 'All Items'.

At the bottom are 'New', 'Save', 'Delete', and 'Close' buttons.

Creating a New Loyalty Program

If you've previously setup a discount; this screen should look very similar in nature. To begin, let's click on the New button.

Next, we'll enter the Name field which determines what will display when the discount is applied.

The Code should be a shorthand name that will appear in reports.

The Based On drop-down can be one of two things: Amount Spent and Number of Visits. In other words, automatic discounts can be configured based on how often a customer visits or on an amount they spend.

The Frequency can either be One-Time, or Recurring. In the example above, Recurring would set the loyalty program to happen every 2000 dollars spent, e.g. when they spend \$2000, \$4000, \$6000, etc.

The Amount field will contain the amount the customer will need to spend or the number of visits.

The Max Redeemable field can limit the number of items on their qualifying purchase that are eligible for the discount. A value of 0 sets no limit.

Discount is Taxable will apply tax to the entire original amount of the purchase amount. For example, if an item originally costs \$20 and the discount applied is a \$5 discount to bring the subtotal to \$15; a 10% tax on this purchase would come to \$2.00 instead of \$1.50.

Cumulative Eligible sets whether the discount can apply to items which have been added cumulatively. The concept of cumulative items will be explained in greater depth in the next section, but for now an example will do: If various items in the same category can be mixed and matched to get a better deal, i.e. 1 for 20, 2 for 30, 3 for 40 and you want the discount to be applicable in such instances, you'll want to keep Cumulative Eligible checked.

Members Only will allow you to set the Loyalty Program up such that only customers who are registered members will be eligible for the discount.

The Discount tab allows you to set either a static amount or percentage off by simply selecting the \$ or % from the drop-down:

The form is a numeric keypad with a title bar 'Discount Price Override'. It includes a dropdown menu with options '\$', '%', and a separator line. Below the dropdown is a numeric keypad with digits 8, 9, 4, 5, 6, 1, 2, 3, 0, and a decimal point (.).

You'll then want to put the dollar amount or percentage into the entry box seen above.

The Price Override tab allows you to offer a variable discount:

Discount Price Override	
Amount	Price
1.00 g	\$4
3.50 g	\$10
Add	
Modify	
Remove	

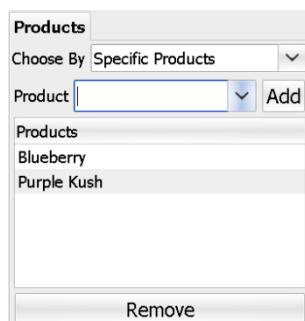
In fact, if you recall creating a Price Point Table for a product; this is exactly the same! You can create a sliding schedule as a discount button by using this method. Using the Add button allows you to add new amounts as shown above, for example, 1 for \$4. If the discount is intended for non-weighable products (e.g. edibles) and you see the grams appear in the box above, don't worry as the system will know when applying the discount that it is non-weighable. Using the Price Override is common in the following situation: Let's say you normally have a price point table that offers \$10/gram, \$30/3.5 grams, \$50/7 grams, \$100/14 grams, \$190/28 grams but you decide to create a discount button using the Price Override to run a Friday special that instead offers a similar price schedule but \$150/28 grams. Thus, the Price Override gives you that capability without changing all of your prices for just one day and then changing them back. Also, by using the Discount Program system, your reports will inform you of how many customers are redeeming the discounts which can be useful for tracking advertising, etc.

Please keep in mind a discount can either be defined as a Price Override or a static Discount amount/percentage; that is, both cannot be set.

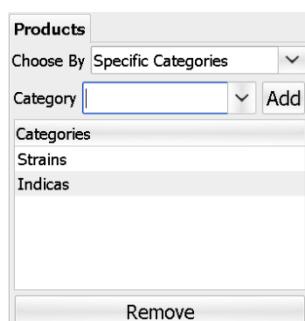
The Products tab allows you to define specific subsets of Products that the discount can only be applied to. There are four options for doing so: Product Attributes, Specific Products, Specific Categories, All Items.



Limiting by Product Attributes can be useful if you only want the discount applied to non-weighable items (e.g. edibles), but all of your items that you want to be eligible are not in the same category. Or, you could set it so that only items that are medicated and weighable (e.g. Bud) are eligible by checking both boxes, as seen above.



Specific Products, as the name implies, allows you to specify the specific products for which the discount can only be applied against. Simply select a Product from the drop-down and click the Add button to add it to the list. If you wish to remove a product from the list simply highlight it and click the Remove button.



Specific Categories follow a similar pattern as the Specific Products choice. You can limit the application of the discount to specific categories that are specified by selecting the Category from the drop-down and clicking the Add button. Removing them after they have been added is as easy as selecting the category and clicking the Remove button.

The final choice is All Items and, as the name implies, places no restrictions on what product(s) the discount may apply to.

Once you have completed setting up the loyalty program to your satisfaction, click on the Save button to add it to the database.

Modifying an Existing Loyalty Program

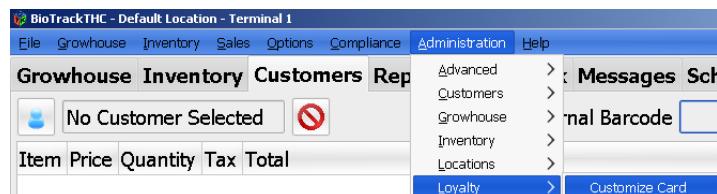
Modifying an Existing Loyalty Program begins by selecting the Program you would like to change from the Existing Programs drop-down at the top of the screen. Once clicked, the system will populate the current discount options on the screen. At this point, you can change loyalty program's limits, the actual discount amount, what products the program can apply to and more. Simply make the changes to the program you'd like to make and click the Save button. You will receive a confirmation that the loyalty program was updated successfully.

Deleting a Loyalty Program

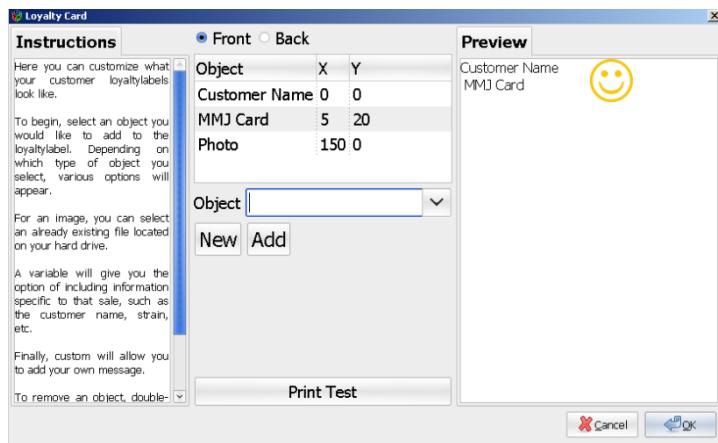
Deleting a Loyalty Program begins by selecting the Program you would like to delete from the Existing Programs drop-down at the top of the screen. Once clicked, the system will populate the discount on the screen. If you are sure you want to delete the program from the system, click the Delete button. The system will ask for delete confirmation and, once approved, the loyalty program will be removed from the system.

Card Customization

As was discussed [previously](#) in the chapter, you can create loyalty cards for your customers, if you wish. To begin the creation and customization of those cards, navigate to the Toolbar and click on Administration, Loyalty, Customize Card:



Which will present the following screen:

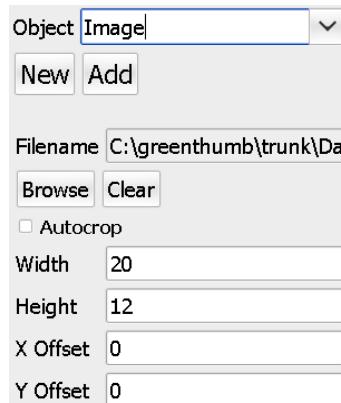


The Loyalty Card Customization should look very similar to the setup required for regular customer labels as discussed in [Chapter 2](#).

The Front and Back radio buttons allow you to setup two different sides to the card. You can switch back and forth between the two while creating the card as necessary.

The basics of the label setup are broken up into five object types: Images, Variables, Lines, Custom text and Document.

The Image type, when clicked, will look like the following:

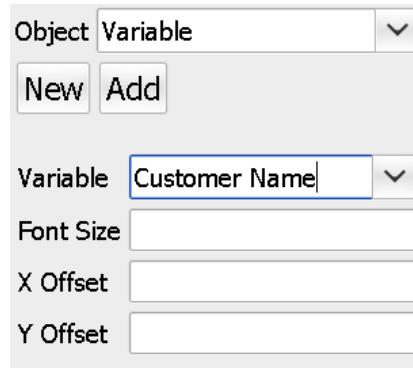


To add a new image, first click on the Browse button. This will popup a window asking you to select the image you'd like to add. Once selected, the system will automatically pull the width and the height. In most cases, it's a good idea to check off Autocrop to maximize the actual image that shows on the label. The width and the height that appear may be too big if the original image is extremely large. You can compensate by changing the values that appear. It is recommended that you lower them proportionally; for example, if your original image has a width of 800 and an original height of 600, you might consider minimizing each by a factor of 10 so that it appears as 80 by 60. The X and Y offsets control where the image will appear on the label, with a 0 X offset adjusting all the way to the left and a 0 Y offset adjusting all the way to the

top. Once you have selected an image and are ready to add it, simply click the Add button and it will appear on the Preview area to the right.

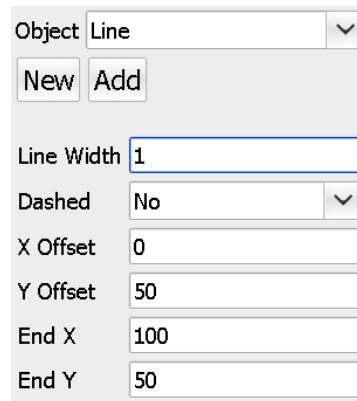
Once an item has been added to the Object list, you may edit it by double clicking on it. This will automatically remove it from the Object list and enter the previously saved parameters. Thus, to delete an item, all you'll need to do is double click on it and then click New.

The next Object type is named Variable. As the name implies, this sets up the label such that this field will be different for every customer.



The Variables that you can choose from include: Customer Name, Member Since, ID Number and MMJ Card.. The font size should be at least 6 to be legible, but can be bigger if you wish. The X and Y offsets will determine how far from the left and top, respectively, the variables appears on the label. 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 change it as necessary.

Lines can also be added to your label, as well. They can be horizontal, vertical or even slanted. Here is a screenshot of what the line customization looks like:



The above settings will create a line that starts from the very left hand side (X at 0) and moves 100 units to the right (End X at 100), it also starts at 50 units down (Y at 50) and ends at 50 units down (End Y at 50); in other words, a straight horizontal line. The

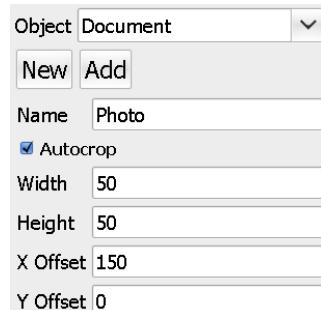
line width can be increased by any whole number value. The line can also be created dashed by changing the No to a Yes in the Dashed drop-down. Once again, trial and error works best for determining where you want your line(s) on the label and how they actually look.

The next object that can be added is called Custom. As the name implies, it allows you to enter Custom text that is the same on every label:



The font size determines the size of the characters that are placed on the label. A minimum of size 6 is recommended. The X and Y offsets determine where the text begins. It will then span from there to the right and down as your settings dictate. The Text Wrap option determines how many characters maximum per line. In the example above, after 50 characters the text would then continue on the next line below. Next, enter your custom message in the Custom Text field. Once you are satisfied, click Add and view it on the Preview label to the right.

The final Object available is named Document. Here is an example of what it looks like:



As you can see, the parameters are similar to that of an Image. The main difference, however, is that instead of selecting a static image that is the same for every card, you are instead selecting a variable image pulled from each customer individually. The Name field determines the actual document that is pulled from each customer's file. It

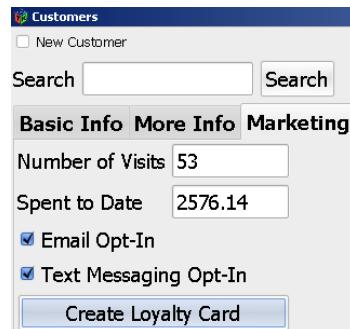
must match the same document name for each customer. For example, above we have entered a Name of photo. So, when inserting new customers and uploading their pictures, we would make sure the document name of that file is Photo for each customer.

The Autocrop option is recommended to be checked in most cases. The Width, height, X Offset and Y Offset setup are exactly the same as that of the Image Object type. You can try various sizes and offsets as necessary and, after clicking Add, try clicking on the Print Test to get an idea of what it will look like in production.

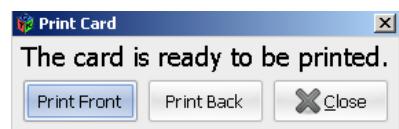
Once you think you have got a good looking label, click on Print Test to see it on your physical card. With some printers, you may find they leave an excessive amount of margin space to the left. If you find this to be the case, simply double click through your items in the Object list, move each of their X offsets to a lower number (negative, perhaps?) and then click Print Test. With a little trial and error, you will eventually get to the perfect looking card!

When you have finished modifying your card, click the OK button to save the changes.

To begin the actual production of cards, lookup a customer and navigate to the Marketing tab:



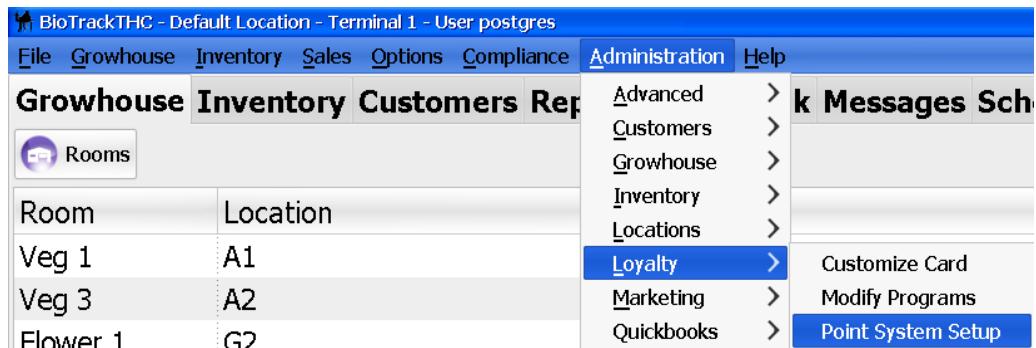
Clicking on the Create Loyalty Card button will then present the following choices:



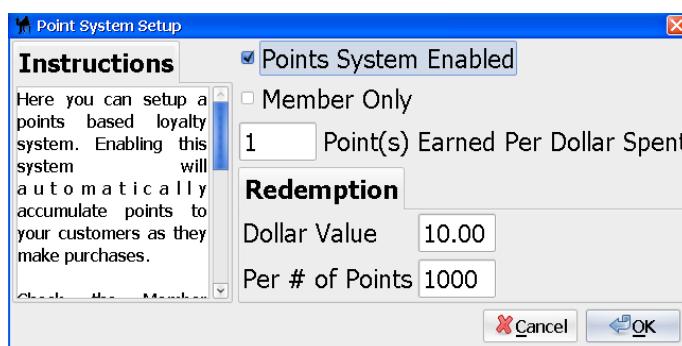
Clicking on the Print Front button will, of course, print the front of the card as defined in the Card Customization. Clicking on the Print Back button will, likewise, print the back of the card. You may then click the Close button when you are finished.

Loyalty Points

An alternative to the Loyalty Programs is the points based system. The points based system can be enabled and configured by navigating to the Toolbar and clicking on Administration, Loyalty, Point System Setup, as shown below:



This will display the Point System Setup screen:



Checking or unchecking the Points System Enabled checkbox will enable or disable the points system.

The Member Only checkbox will set points to only accumulate when a customer has been designated as a member.

You can enter the number of points that are earned per dollar spent. The default is set to 1, but this can be a number greater than 1 or it can also be a decimal value (0.5, for example).

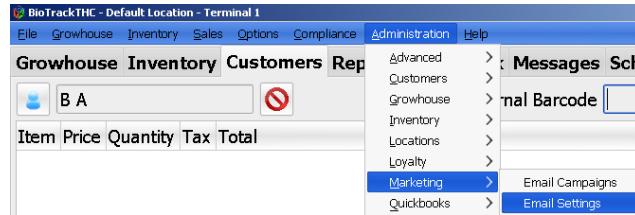
The Redemption tab will allow you to set a number of points threshold and how much monetary value those points are worth. In the example above, 1000 points earned are worth a \$10 dollar discount.

Clicking on the OK button will save any changes to the loyalty point system. Keep in mind the loyalty point system is based on location, so if you have multiple dispensary locations and wish to use the point system you will need to configure this properly for each location. This, of course, allows you to either toggle it the same or differently, per location.

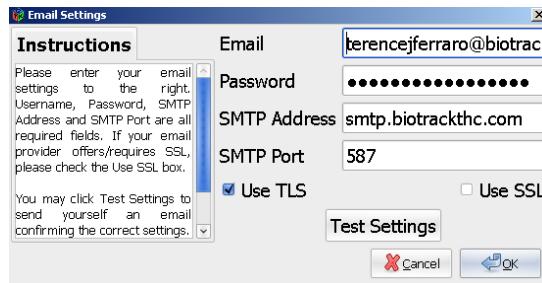
Marketing

The system has built-in capabilities to market specials, discounts, etc. to your existing customer base either through text message or email. It does this by To begin, you'll

first need to configure your Email Settings by navigating to the Toolbar and clicking on Administration, Marketing, Email Settings:



Which will bring up the Email Settings configuration screen:



Email Settings

To begin, you'll need to have an email provider that supports SMTP (most do). The Email field should be your full email address, e.g. youremail@gmail.com. Next you'll put your password into the Password field. The SMTP address is the address that your email goes through. For example, gmail uses smtp.gmail.com and yahoo uses smtp.mail.yahoo.com. The SMTP port can usually be found in the same place where you find the address. Gmail, for example, uses port 587 while Yahoo uses 465. The next checkboxes are Use TLS and Use SSL. You can either have both checked, Use TLS checked or Use SSL checked. In other words, it's one, the other or none at all. Gmail uses TLS, while Yahoo uses SSL. When in doubt, contact your email provider and they should be able to provide you with the proper SMTP settings.

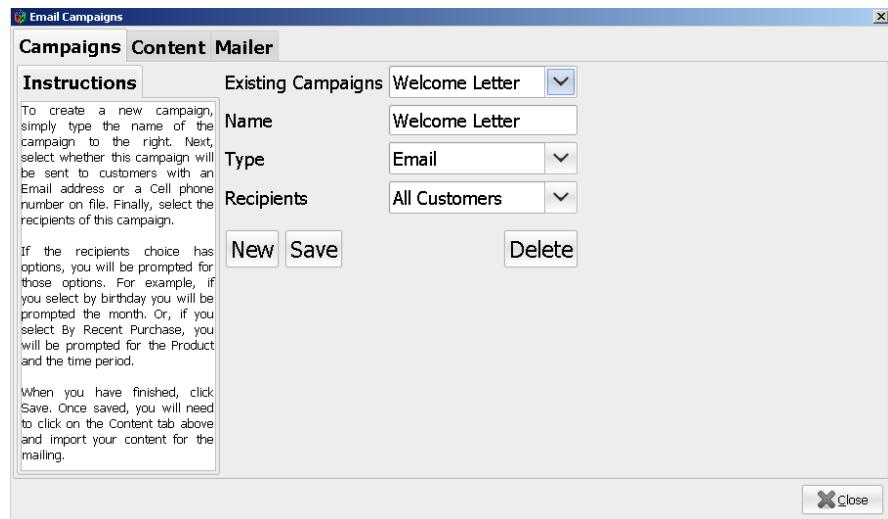
Assuming that everything has not been input, click on the Test Settings button and the system will use those settings to send a blank email from yourself to yourself. If you received the email then congratulations as the settings were setup successfully and you can click OK to save them. If they were not or you receive an error after clicking Test Settings, you'll need to verify your email address and password and try again. Or, if you're confident those are correct, contact your email provider to confirm the SMTP settings.

Campaigns

To begin setting up a Campaign, navigate to the Toolbar and click on Administration, Marketing, Email Campaigns:



This will then present the main Campaigns screen:



There are three main tabs on this screen: Campaigns, Content and Mailer. The Campaigns tab is where you will setup the basic parameters of a campaign determining what customers will receive the mailing. The Content tab will define what actually gets sent to your customers. Finally, the Mailer tab is where you can actually send out the mailing.

To begin creating a new Campaign, first click the New button. Next, select a meaningful name for the campaign. In the example above we have named ours Welcome Letter. The next parameter is Type and it has two options: Email and SMS. The Recipients determines who the campaign will be sent to, with the following choices: All Customers, By Birthday, By MMJ Card Expiration, By License Expiration, By Recent Purchase and by No Activity.

When selecting either By Birthday, MMJ Card Expiration or License Expiration, the system will also ask you to select a month:

Recipients	By Birthday
Month	July

When selecting by Recent Purchase, the system will ask you for when in the last X number of days the purchase should have been made. Also, optionally, you can select a specific Product.

Recipients	By Recent Purchas	<input type="button" value="▼"/>
Past X Days	30	
Product	Blueberry	<input type="button" value="▼"/>

The option of No Activity allows you to select customers who have not made a purchase in the last X number of days:

Recipients	No Activity	<input type="button" value="▼"/>
Past X Days	30	

Once you have decided who you would like to send this campaign to, click the Save button to save the campaign. If you need to modify the campaign, you can always select it from the Existing Campaigns drop-down, make the necessary modifications, and click Save again to change the campaign. Or, by selecting an Existing Campaign and then clicking the Delete button, the system will remove the campaign.

Once the basic parameters of a campaign have been defined, you'll want to click over to the Content tab:

The screenshot shows the 'Email Campaigns' application window with the 'Content' tab selected. The interface is divided into several sections:

- Instructions:** A text area containing instructions: "Please select a campaign to begin editing the content."
- Campaign:** A dropdown menu set to "Welcome Letter".
- Delivery Options:** Radio buttons for "Send HTML and Text Versions" (selected), "Send HTML Version Only", and "Send Text Version Only".
- From:** An input field containing "test@biotrackhc.com".
- Subject:** An input field containing "Welcome to our list!"
- Variables:** A list of variables: \$firstname, \$middlename, \$lastname, \$visits, \$amountspent.
- HTML Version:** A code editor containing the following HTML:


```
<html>
<body>
Hey $firstname,
```

Thanks for joining our mailing list!

```
</body>
</html>
```
- Text Version:** A code editor containing the following text:


```
Hey $firstname,
```

Thanks for joining our mailing list!
- Buttons:** "Save Changes" and "Discard Changes" at the bottom.
- Close Button:** A "Close" button in the bottom right corner.

Selecting a Campaign from the drop-down at the top of the screen will activate that campaign's content, if any has been added thus far, and display it. Or if no content has been added yet, you will now be able to add some.

First, you'll want to select whether HTML or Text is sent. If this is an Email campaign, it's recommended you leave the setting set to "Send HTML and Text Versions". If this is an SMS (text message) campaign, you'll probably want to select "Send Text Version Only".

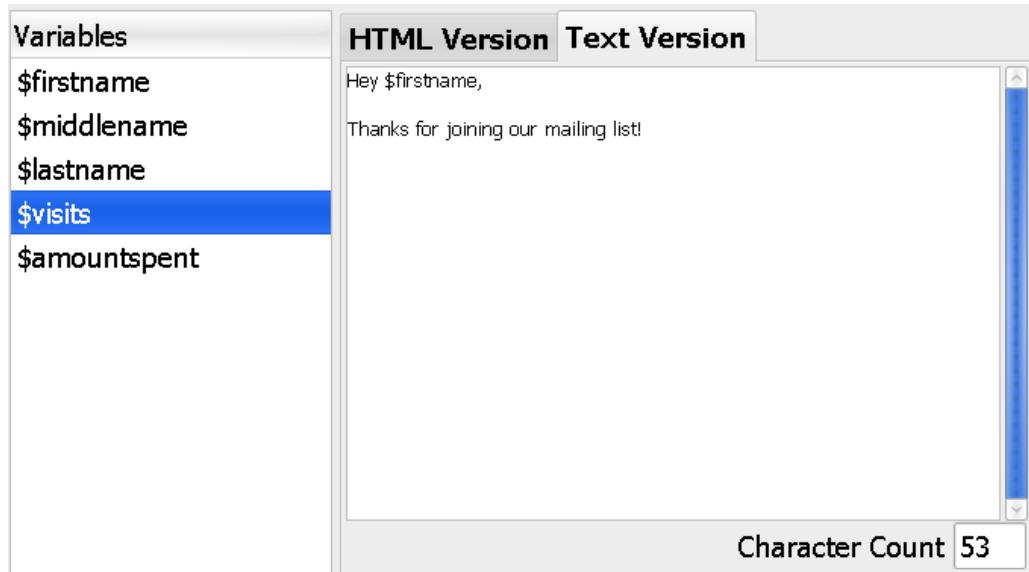
The From address should be the address that was set previously in the Email Settings. But, you could, if you so choose, make it a little more personable. For example, instead of just "test@biotrackthc.com" we could use "Testing <test@biotrackthc.com>".

The Subject should be a brief description of the email or SMS message.

The HTML Version and Text Version tabs allow you to define the content of the email or text message. The HTML version should (but does not necessarily need to) contain HTML code and the text version should only contain basic text. To generate HTML code you could use something like Microsoft Word to design the email, export to HTML (e.g. http://www.ehow.com/how_6228_convert-microsoft-word.html) and then copy and paste the code into BioTrackTHC.

You may have also noticed the Variables column with the following entries: \$firstname, \$middlename, \$lastname, \$visits and \$amountspent. These will allow you to dynamically insert content into the text message or email. For example, your email could address the customer specifically by their first name: "Thanks for your continued business John, as a way of thanking you...". To you, however, the content would read: "Thanks for your continued business \$firstname, as a way of thanking you...". Every customer would then have their first name in the email this way. To insert a variable, simply place your cursor where you would like it to be inserted and double click on the variable you would like. Technically, you could write it out yourself, but the double-click method is recommended to prevent an accidental misspelling.

The Text Version tab has one additional feature:

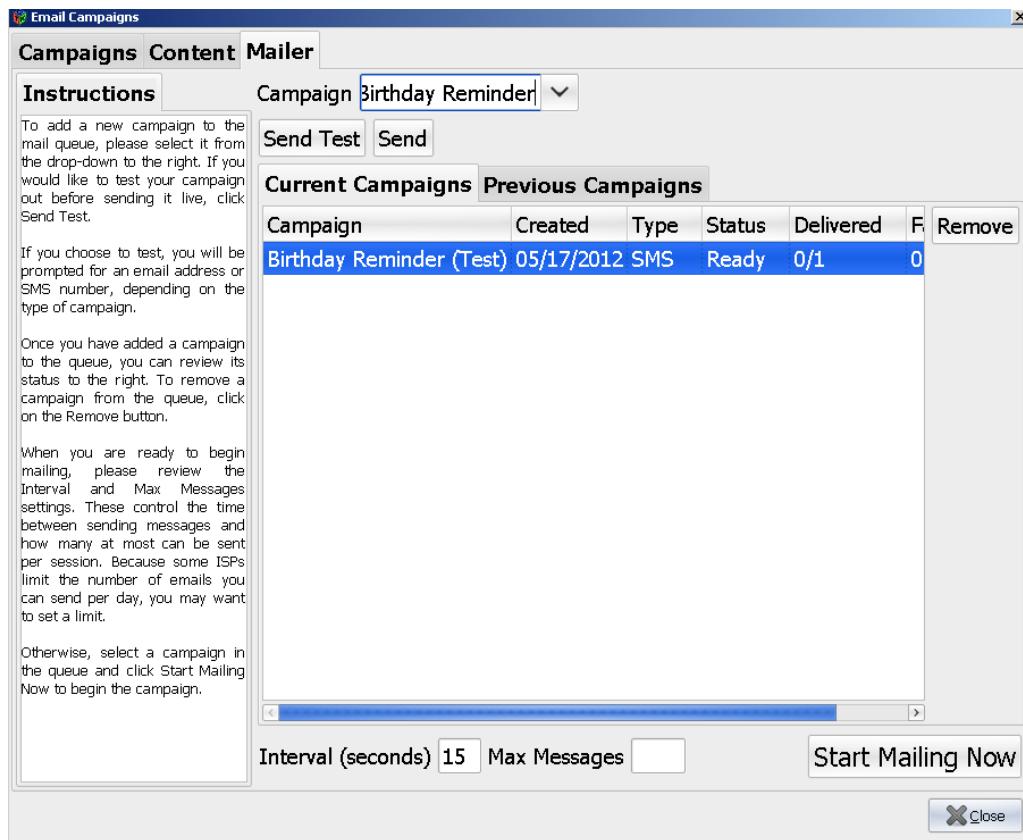


The Character Count will count the number of characters in your text version as you type them. If you are composing an Email Campaign, this field is irrelevant and you can ignore it. If, however, this is an SMS campaign, it can help you stay under the 160 character limit that most cell phone carriers impose.

You may, as you proceed through this screen, click the Save Changes button at any time to save the settings. Clicking on Discard Changes will revert the settings to the last saved version.

The Mailer tab is the next and final tab on the Campaigns popup screen. This tab will allow you to begin the testing and sending of your email or text message campaign. Please keep in mind that while a campaign is being sent, the program will be otherwise unavailable. So you may wish to perform this on a terminal that is not normally used for sales, etc.

Here's a screenshot of what the Mailer tab will look like:



The first thing you'll want to do is select the Campaign from the drop-down. Before sending a campaign out to your customers, you'll probably want to send a test first. To do so, click on the Send Test button. If your campaign is an SMS (text message) campaign, you'll see the following:



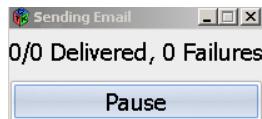
Simply enter your cell phone number and select your Carrier from the drop-down menu. Your test will then be added to the Current Campaigns list.

If the campaign is an Email campaign, you'll see the following:



Now that the test has been added to the Current Campaigns, you'll see it in the list that shows when the campaign was scheduled, the type and status of the campaign, how

many have been delivered, how many messages are remaining to be sent and how many delivery failures there have been. You'll now want to highlight the test campaign that we've added and click on Start Mailing Now. This will begin the process of sending our (one) test email or text message:



The progress bar will list deliveries as they are being processed. You can pause a campaign at any time by clicking on the Pause button. It can then be continued at a later time by highlighting it and, once again, clicking on the Start Mailing Now button.

You can also remove a campaign from your active campaign list by highlighting it and clicking on the Remove button.

You may have also noticed the Interval (seconds) and Max Messages textboxes at the bottom of your screen. The Interval controls how often an email or text message is sent out; that is, in our example above if a message is sent out the system will pause for 15 seconds until it sends the next one and so on. It's usually a good idea to leave this at 15 seconds as many ISPs will throttle or block your emails if you send too many at once.

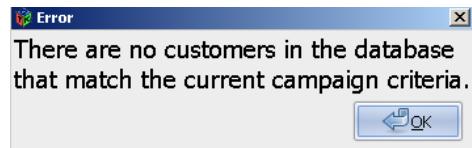
The Max Messages allows you to set the maximum number of messages that may be sent at one time. Some ISPs will limit the number of emails that may be sent in a single day (Gmail, for example, will limit you to 100 messages per day). You can enable this by entering a number in the Max Messages field. The system will then automatically pause a campaign after it hits that limit at which point you could continue sending the next day. Ideally, you will be using a non-free email service (e.g. if you own your own domain, sending from that email address) so that you don't have to worry about exceeding any limits. If you don't, however, be aware of this option as exceeding such a limit will result in a bunch of returned-to-sender emails and anything beyond your limit will not be received.

The Previous Campaigns tab will list your campaigns that have already completed:

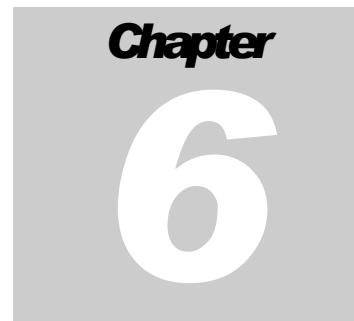
Current Campaigns Previous Campaigns					
Campaign	Created	Type	Status	Delivered	Failure
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	Email	Completed	1/1	0
Birthday Reminder (Test)	07/15/2012	SMS	Aborted	0/1	0
Birthday Reminder (Test)	05/17/2012	SMS	Aborted	0/1	0
Birthday Reminder (Test)	03/06/2012	SMS	Completed	1/1	0
Birthday Reminder (Test)	03/06/2012	SMS	Completed	1/1	0
Birthday Reminder (Test)	02/07/2012	SMS	Completed	1/1	0
Birthday Reminder (Test)	02/07/2012	SMS	Completed	0/1	1
Welcome Letter	11/28/2011	Email	Aborted	0/10	0

After sending a successful Test, you'll want to check your email (or cell phone) and review the results. In a test, if your content included any variables (e.g. \$firstname), the system will pull one of your customers at random and insert their information, instead, into the test. In this way, you can confirm exactly how it will appear to your customers.

At some point, after clicking the Send button, you may run into this:



If you receive this error, you may need to revise your campaign settings on the Campaign tab to be less restrictive. In the case of an SMS campaign, you may want to ensure your employees are selecting the cell phone carrier of a customer in addition to their cell phone number.



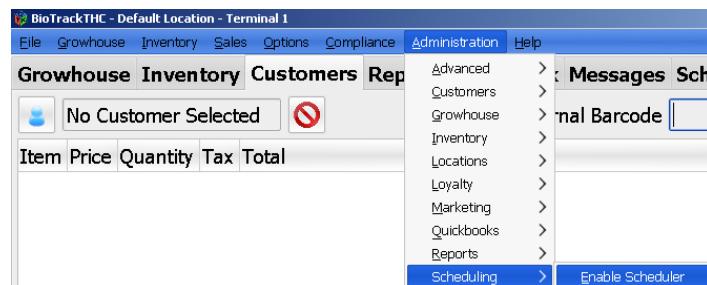
Chapter 6: Appointments

In this chapter, you'll learn how to:

- ✓ Enable or disable the scheduler
- ✓ Setup a detailed schedule for a provider
- ✓ Review a provider's schedule
- ✓ Review a specific customer's appointments
- ✓ Create or modify a new appointment

Enabling the Scheduler

The appointment scheduler allows you to schedule and track appointments directly from BioTrackTHC. This can be useful if your center provides additional services such as massage therapy, etc. To enable the scheduler, navigate to the Toolbar and click on Administration, Scheduling, Enable Scheduler:

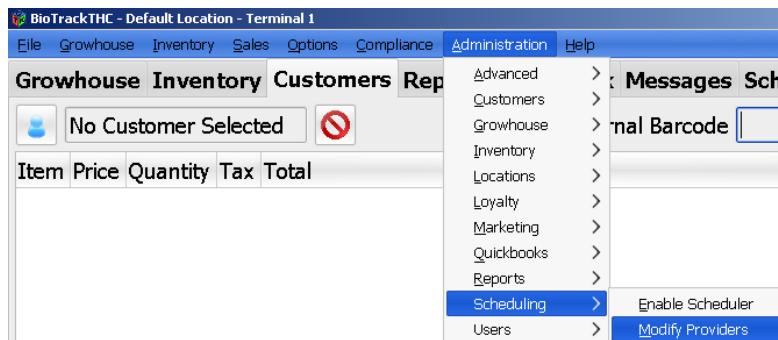


Enabling (or disabling) the Scheduler is as easy as clicking on the checkbox and clicking the OK button. Once saved, you will need to restart the program to see the Scheduler tab.



Providers

Providers are the backbone of the scheduler. You create and modify providers to then setup and insert appointment times into their respective schedule. To begin setting up Providers, navigate to the Toolbar and click on Administration, Scheduler, Modify Providers:



Which will bring up the Providers screen:

The 'Providers' dialog box is displayed. On the left, there is an 'Instructions' section with text explaining how to add or modify providers. The right side contains form fields for 'First', 'Middle', 'Address', 'City', 'State', 'Zip', and 'Phone'. Below these are 'Schedule' settings for 'Weekday' (Monday), 'Interval' (15), 'Day Start' (9:00 AM), 'Day End' (5:00 PM), 'Lunch Start' (12:00 PM), and 'Lunch End' (1:00 PM). Buttons for 'Add Workday' and 'Remove Workday' are available. A 'Work Week' section shows a grid of workdays with columns for Day, Day Start, Day End, Lunch Start, and Lunch End. The grid data is as follows:

Day	Day Start	Day End	Lunch Start	Lunch End
Monday	09:00 AM	05:00 PM	12:00 PM	01:00 PM
Tuesday	09:00 AM	05:00 PM	12:00 PM	01:00 PM
Wednesday	09:00 AM	05:00 PM	12:00 PM	01:00 PM
Thursday	09:00 AM	05:00 PM	12:00 PM	01:00 PM

At the bottom are buttons for 'New', 'Save', 'Delete', and 'Close'.

Adding a New Provider

To begin the process of adding a new provider, first click on the New button. Next, enter a First and Last name for the new provider. The rest of the information, including Address, Phone, etc. is completely optional and at your discretion to enter. Once you have entered that information, it's time to actually setup the schedule.

To begin that process, first navigate to the Schedule tab. To add a new day, simply select the weekday from the drop-down, Monday, for example. Next, select an interval for the specified provider. By default, this will be 15 minutes, but it can be set to any valid number.

The day start portion will decide when a schedule should begin for a provider, while the day end portion will decide when a schedule should end.

The Lunch Start and Lunch End will decide when to block off a provider's schedule due to lunch.

If a user does not wish to block off a certain time for lunch for a provider, they can simply choose a lunch time that falls outside of the provider's Day Start and Day End times. This will effectively ensure that there are no schedule gaps.

The user may then click on Add Workday to add the selected day and times to the provider's potential schedule. After adding a day, the system will automatically select the next possible day from the drop-down and leave the times the same, for ease of use in adding additional days.

If a user wishes to remove a day from the schedule, or to modify a day, simply click on the day in the Work Week tab and click on Remove Workday. This will remove it from the list and into the drop-down. At this point, a user may click OK to save the changes, or re-add the day with new start or end parameters.

Once all of the information has been entered including a schedule, you may click the Save button to save the new provider. You will need to restart the program in order to see the new provider on the Scheduler.

Modifying an Existing Provider

Providers can easily be modified by first selecting them from the Existing Providers drop-down. Once selected, you can change any of the information necessary including modifying their Schedule as described above. Once changes are made, if any, click the Save button to proceed and accept the changes.

Deleting a Provider

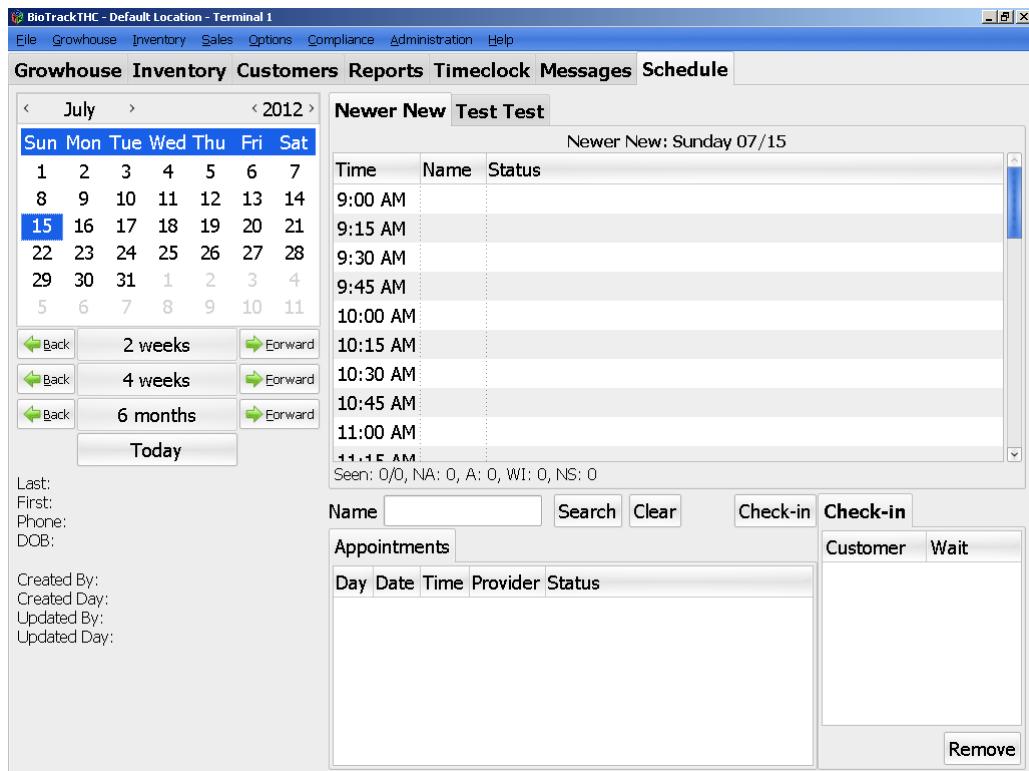
Providers can easily be deleted by first selecting them from the Existing Providers drop-down. Once selected, click the Delete button to remove the provider from the system. You will need to restart the program to no longer see their tab on the Scheduler.

Viewing a Provider Schedule

Once a provider has setup their schedule, it can be viewed on the Scheduler tab. The Scheduler tab will show any and all providers that have been inserted into the system. If a provider's schedule has not been setup yet, it will show up the default 9 A.M. to 5 P.M., with a lunch hour from 12 P.M. to 1 P.M.

The appointment schedule is laid out with a calendar on the left hand side. The calendar allows a user to quickly navigate to different days. There are also shortcuts below the calendar that allow a user to move back or forward at intervals of two weeks, four weeks and six months at the click of a button. A user may return to the current day at any time by clicking on the Today button.

On the right side of the screen is a list of providers, each with their own tab. You can switch between provider schedules by simply clicking on the tab of the provider who you wish to view. The schedule has three columns; one showing the time of the appointment, the second showing the name of the customer the appointment is for and the third is the status of the appointment. The following screen shows what the appointment screen looks like:



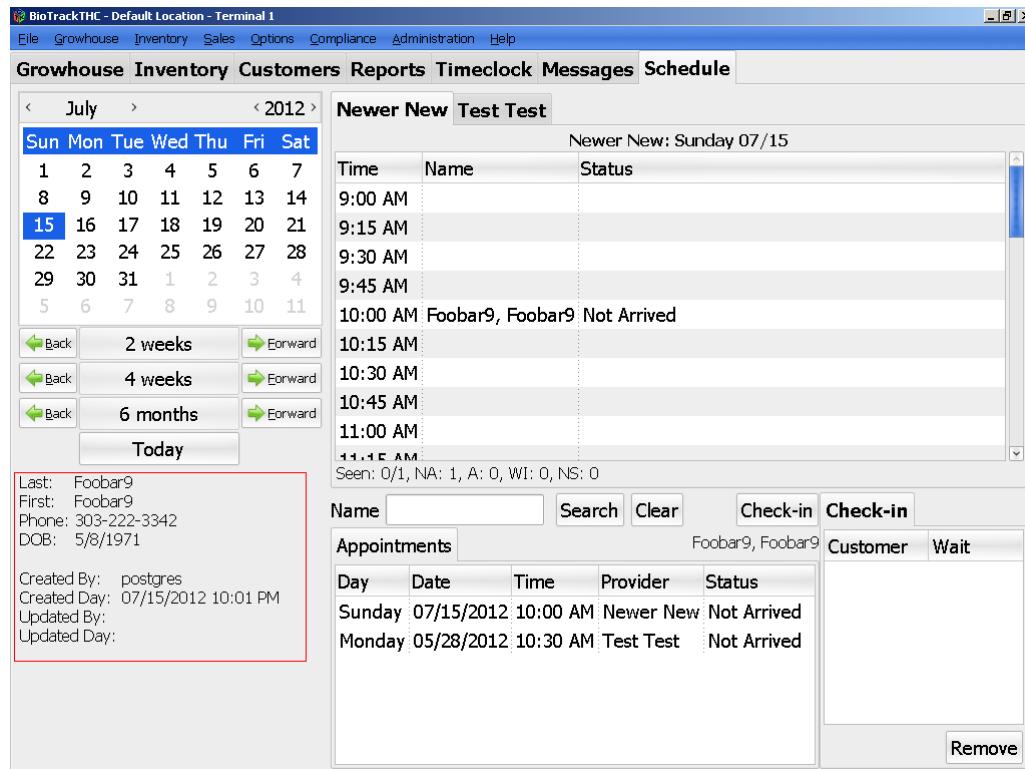
In the bottom portion of the screen is where a user may look up an individual's entire appointment history. It shows the time and date of the appointment, which provider the appointment is with and the status of the appointment.

The appointment screen also includes the check-in functionality in an identical manner as the Customers screen to easily allow a user to click over to different customers that have already been checked in.

When the mouse cursor is moved over an active appointment, the area in the bottom left of the screen will populate with that name, phone number and birthdate of the customer. This allows a user to easily highlight and call customers without having to individually lookup said customers. This is highlighted in the following screenshot.

One additional item of note, also seen in the following screenshot, is a key at the bottom of each provider's schedule that, in the following example, shows: "Seen: 0/1, NA: 1, A: 0, WI: 0, NS: 0, NP: 0". This key indicates an at-a-glance view of the status of the various appointments on a given day. Seen totals the number of customers who arrived on their expected schedule, customers who arrived early and walk-ins; in other words, the total number of customers that have been seen. NA stands for Not Arrived and indicates customers who have an appointment on the schedule day but have not arrived. A stands for Arrived and indicates customers who had an appointment, have arrived and checked-in. WI stands for Walk-In and indicates a customers who was inserted as an arrival but did not have an appointment. NS indicates how many No Shows are on the schedule, in other words customers who had an appointment but,

for whatever reason, did not show up. NP stands for New Patient and will indicate how many customers arrived on a given day but have never had an appointment before.



To review a specific customer's appointments a user may do so through any of the convention means, e.g. driver's license swipe, clicking into the Name entry box and typing a partial name or clicking on an already checked-in customer in the Check-in tab.

Once a customer has been looked up, the screen will appear similar to the following:

Appointments				
Name	Search	Clear	Check-in	Foobar9, Foobar9
				Foobar9, Foobar9
Day	Date	Time	Provider	Status
Sunday	07/15/2012	10:00 AM	Newer New	Not Arrived
Monday	05/28/2012	10:30 AM	Test Test	Not Arrived

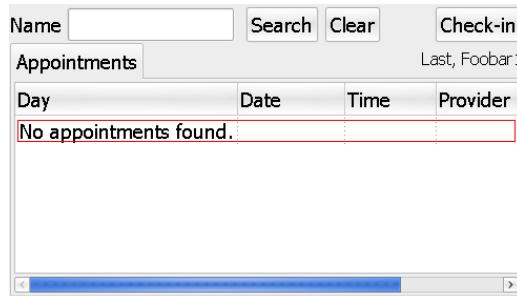
Creating A New Appointment

Creating a new appointment can be accomplished through two ways. The first, and, most common way is through the drag and drop system. The second method involves a little more typing, but both are equally effective.

The easy way

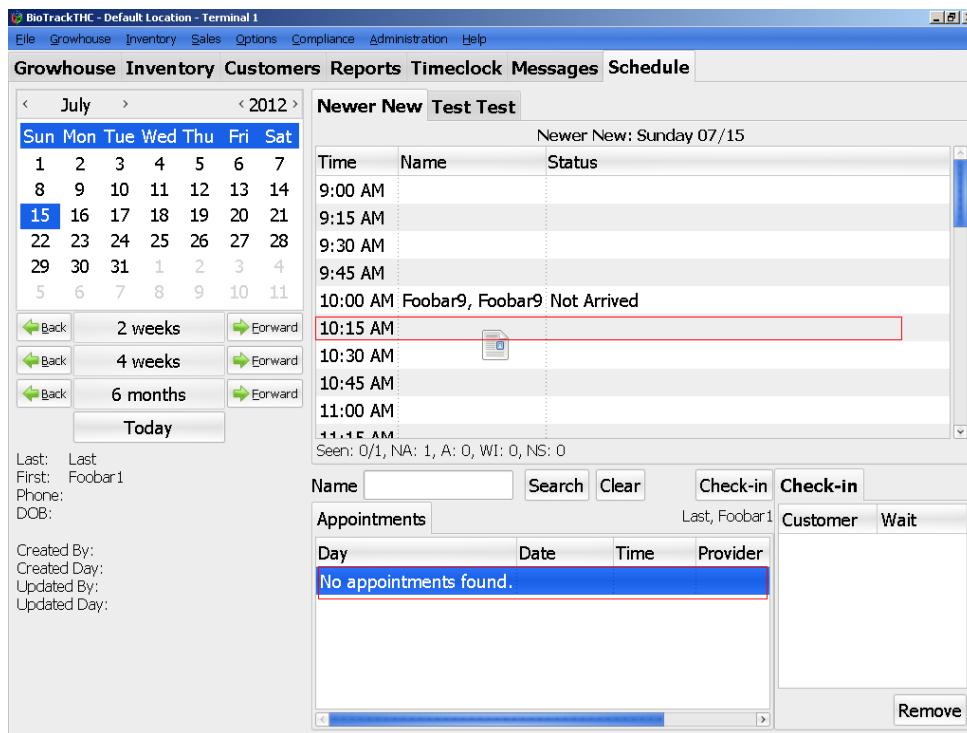
The easiest way to add a new appointment is through the drag and drop interface. To begin, first lookup a customer. Once a customer is active in the bottom Appointments tab, we can add a new appointment for the selected customer a number of ways.

First, navigate to the day you wish to add the appointment for. Next, left click on the appointment time you wish to assign and hold down the mouse button. Then, drag the mouse cursor down to the bottom Appointments window where the customer's appointment history is listed. Then, let go of the cursor over one of the customer's already existing appointments or, if the customer has no appointments yet, there will be a row that reads "No appointments found", as seen below:

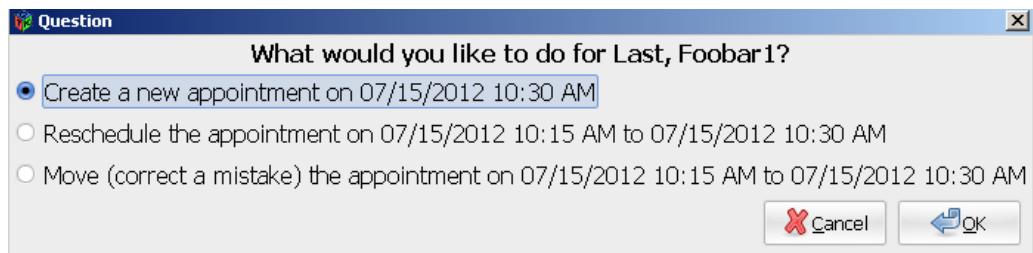


Once dropped, the new appointment time will appear in the customer's personal Appointments list and will also appear on the provider's schedule.

Another way to drag and drop is to drag from an already existing appointment (or the line "No appointments found") to the provider's scheduled time, as can be seen in the following screen:

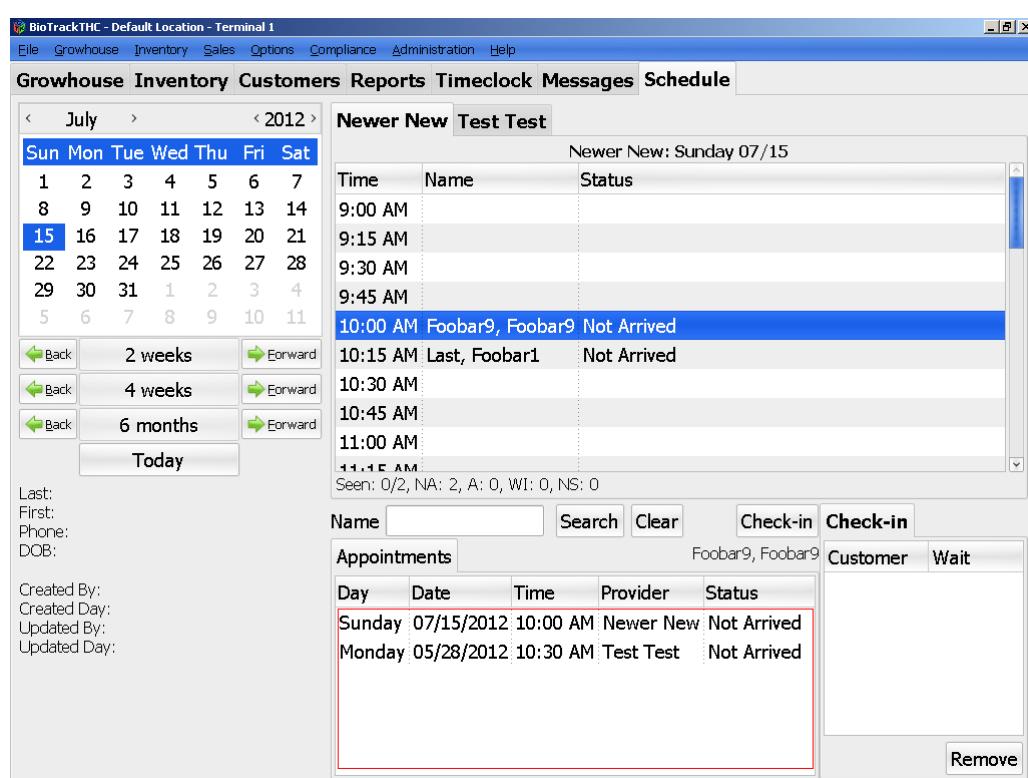
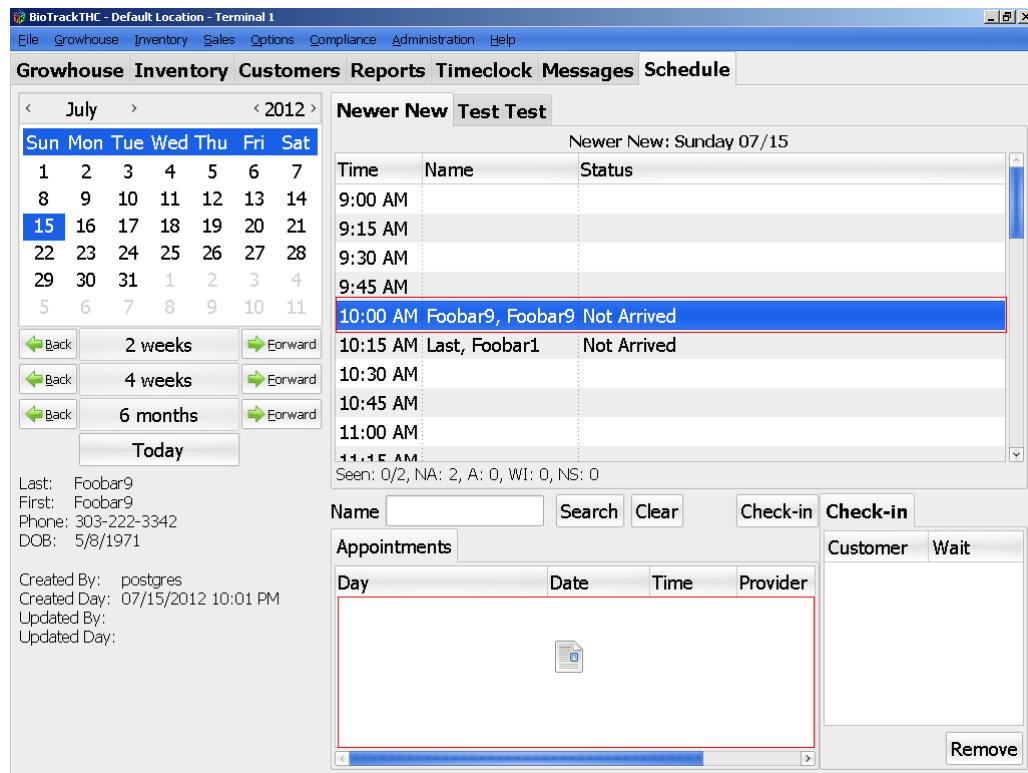


If the drag and drop has been done from an existing appointment, the following screen will appear:

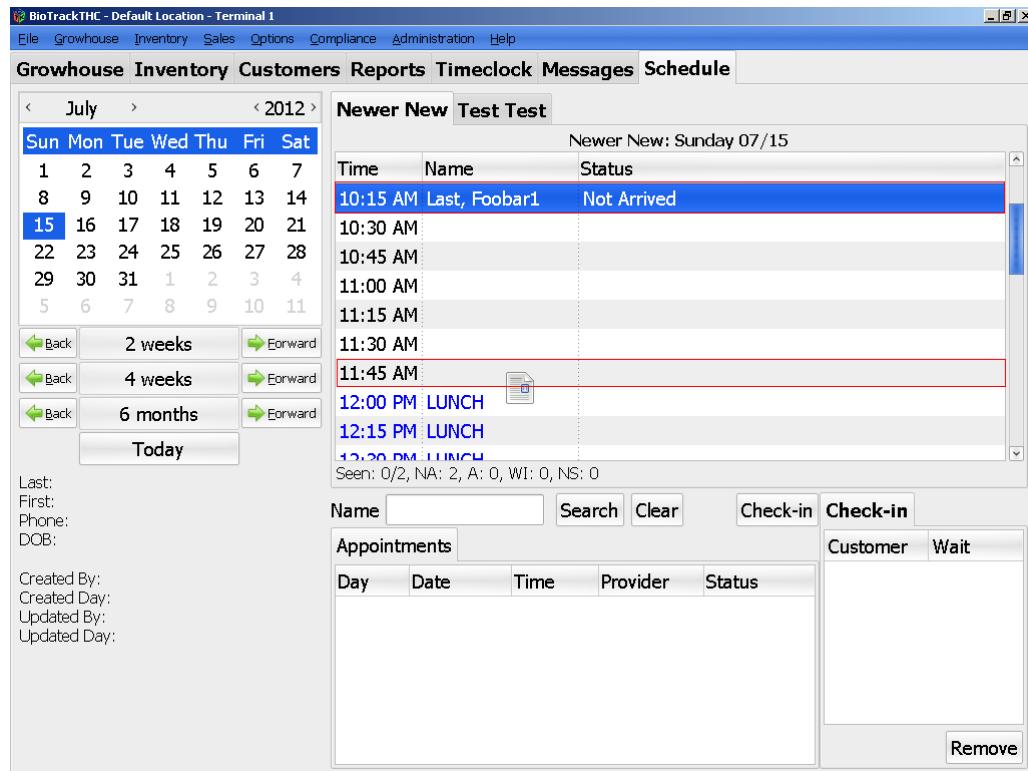


This then allows you to create a new appointment by simply clicking OK. This also allows you to, however, reschedule an appointment or simply correct a mistake. Rescheduling has the same effect as correcting a mistake except that, for reporting purposes, rescheduling keeps a tally of the number of times a customer has rescheduled whereas correcting a mistake does not produce such a corresponding record.

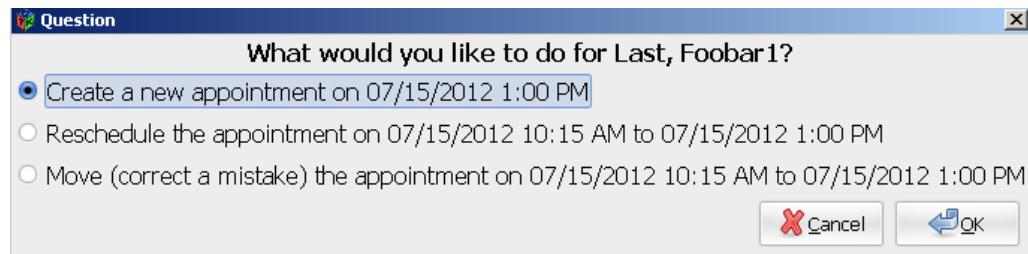
The drag and drop interface can also be used in other ways, as well. For example, if a user is viewing a schedule and wishes to look at a specific customer's appointments they can simply drag and drop the customer's already existing appointment to the bottom Appointments window and the system will automatically lookup that specific customer and load their personal appointment history. The following two screenshots demonstrate this capability.



Drag and drops can also be done within the same day of the provider's schedule, for example:



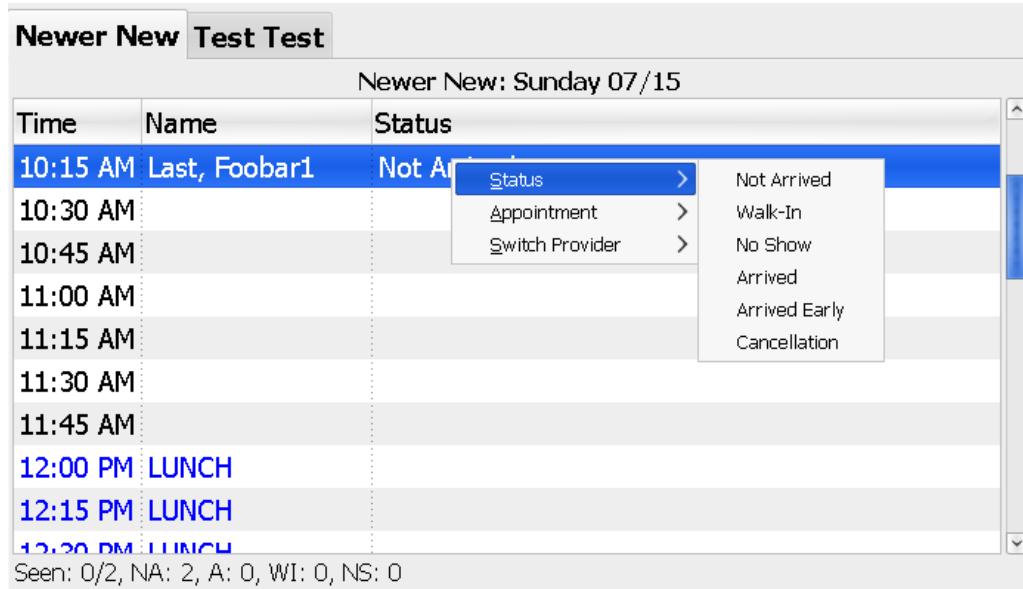
The drag begins on the customer's original appointment and ends on a time during the same day that you would like to move it to. This will present a familiar popup:



This, once again, allows you to simply create another appointment for the selected customer, or to reschedule the appointment, or to correct a mistake.

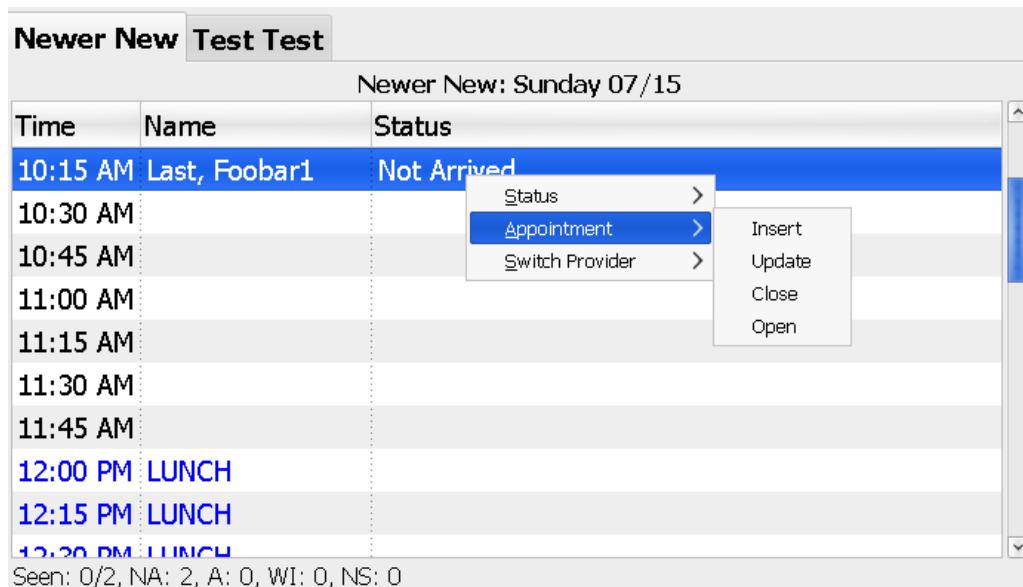
Before we get to creating appointments without the drag and drop interface, let's cover a few more shortcuts.

Right clicking on an existing appointment will bring the following screen up:

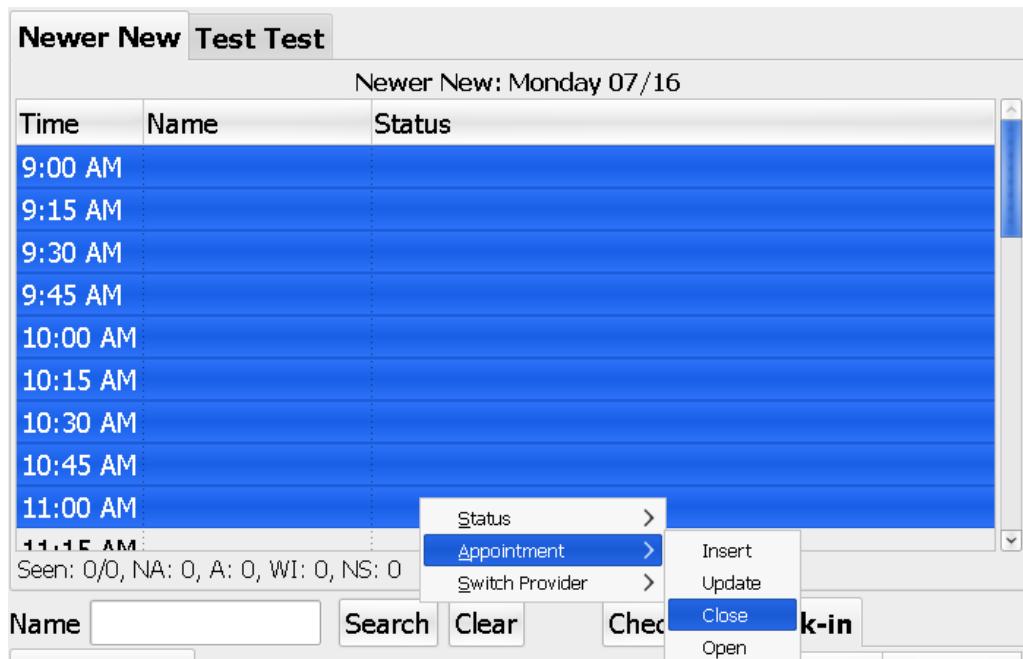


The first right click category named Status allows you to quickly change an appointment's status by simply clicking on the new desired status. Clicking on the Arrived Early status will modify the appointment's set time to the current time. For example, if a customer was scheduled for 10 A.M. on a given day, and they arrive at 9 A.M. and the user clicks on Arrived Early at 9 A.M., the system will move the appointment to 9 A.M., but make a note in the system that their original appointment time was, in fact, 10 A.M.

The second right click category is named Appointment. It allows a user to Insert or Update (the manual way, covered next) an appointment. It also allows a user to mark certain appointments times Closed or, if the appointment time is already closed, to Open it back up.

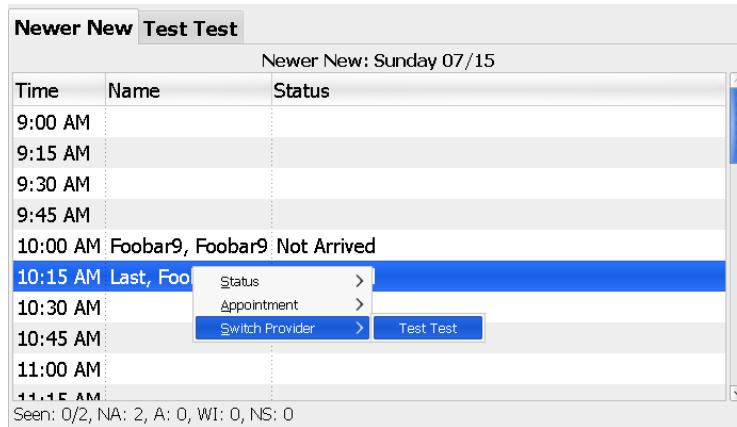


Closing off appointment times can be useful if the provider will not be present on a day in the future that they normally would be and to ensure another staff member does not accidentally book an appointment on just such a day. For this use, multiple times can be selected at once by selecting the first appointment time by **left clicking** on it so that it is highlighted. Next, press and hold the **shift key** down. Finally, **right click** on the final time to be closed off. As long as the shift key is held, you may also click on the right scrollbar and move it down so that the last item in the list is the one that you click on. The other way to trigger this is to simply press the **down key** after pressing and holding down the **shift key**. This will then move the window to the bottom appointment and you can, once again, **right click** on the final appointment to see the screen shown below.



If the screen is filled with appointments that have been closed off, the same exact method can be used to re-open them.

The final right click category is named Switch Provider. This category will list all additional providers, other than the one whose schedule is currently listed. Clicking on one of the other providers will then move the selected customer's appointment to the provider select at the exact same date and time that they were scheduled for previously. If there is only one provider in the system this category will be blank. The following screenshot shows an example of what it will look like:



The manual way

Now that we've covered the easiest way to modify appointments in the system we're going to cover the more hands on way to change appointments. First, start by double clicking on a blank appointment time. That will bring up the following popup:

Setup Appointment

Insert Update Name Search

Name Provider Newer New

Date / / Time : AM

Walk-in?

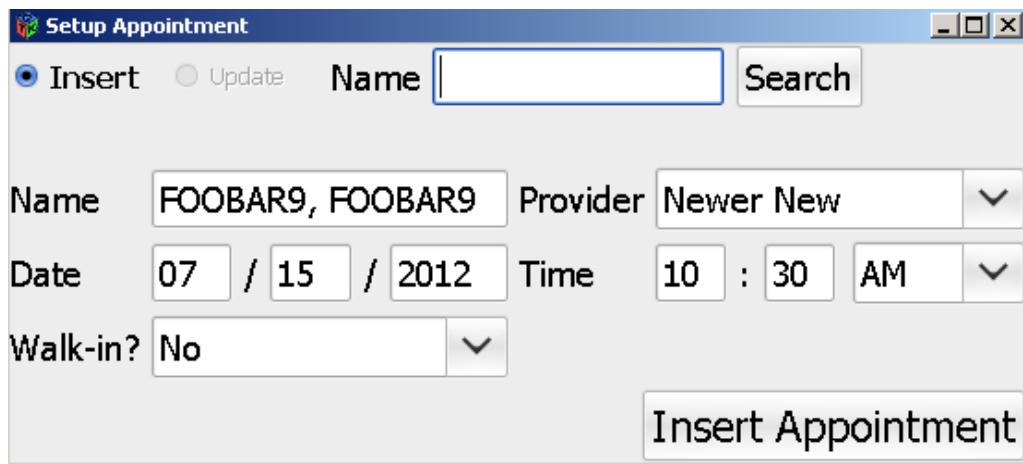
Insert Appointment

On this screen, first we'll need to select a customer. We can type in a name and click the Search button. You may use the standard methods for searching including first or last name, including a partial name. If there are multiple matches, you will be prompted to select the correct customer.

Multiple Matches Found

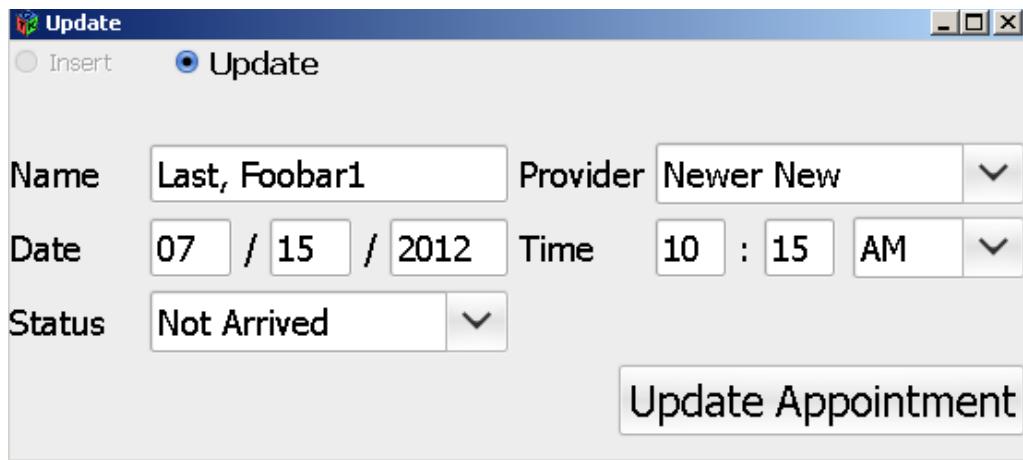
ID #	Name	DOB	Phone
233-4A9-D5AC	A, B	//	
E65-D75-95C9	FOOBAR9, FOOBAR9	//	
DF7-E1D-8BE4	Foobar10, Foobar10 Middle	5/8/1970	303-222-3343
9E6-630-ED91	Foobar10, Foobar10	//	

Now that a customer has been selected, the screen will now look like the following:

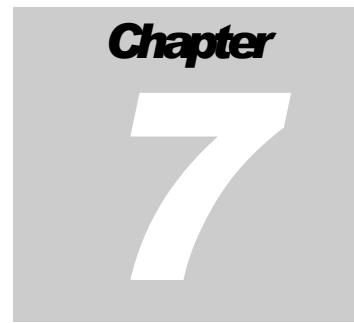


You may now simply click Insert Appointment and the appointment will be inserted. At this point, you may also edit the details, as necessary. For example, you can manually change the date, the time or the provider.

Double clicking on an existing appointment will pull up a slightly different screen:



The date and time of the appointment can now be manually changed, including the provider and the status. Once the necessary changes have been made, simply click on the Update Appointment button to complete the update and return to the appointment screen.



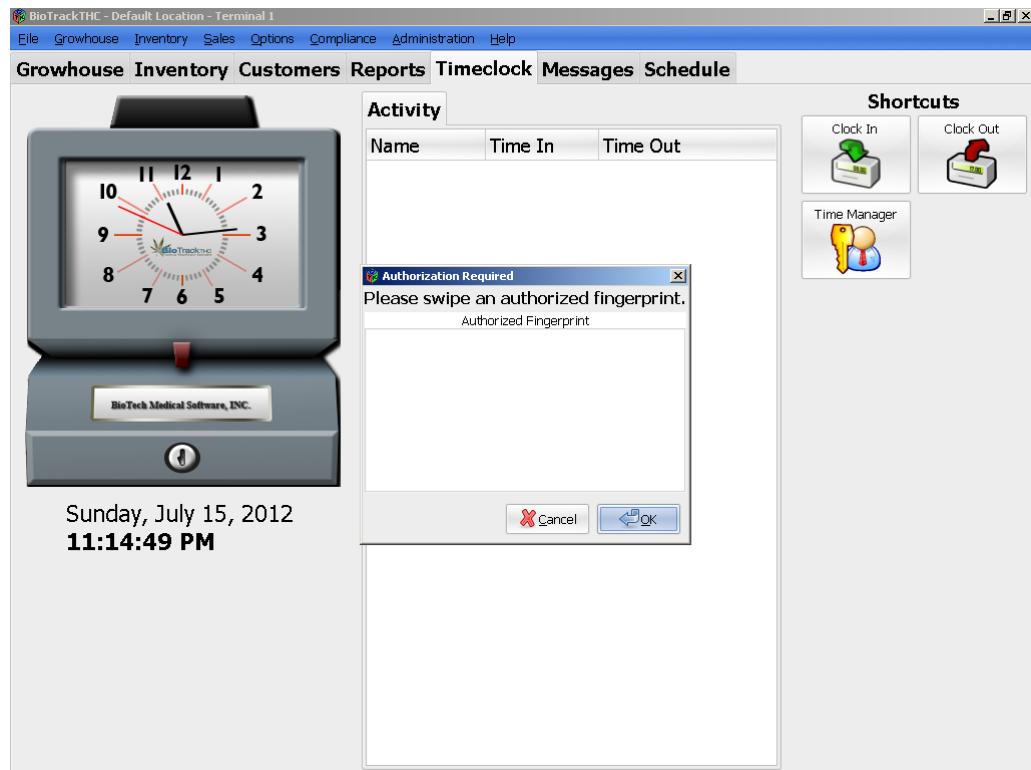
Chapter 7: Timeclock

In this chapter, you'll learn how to:

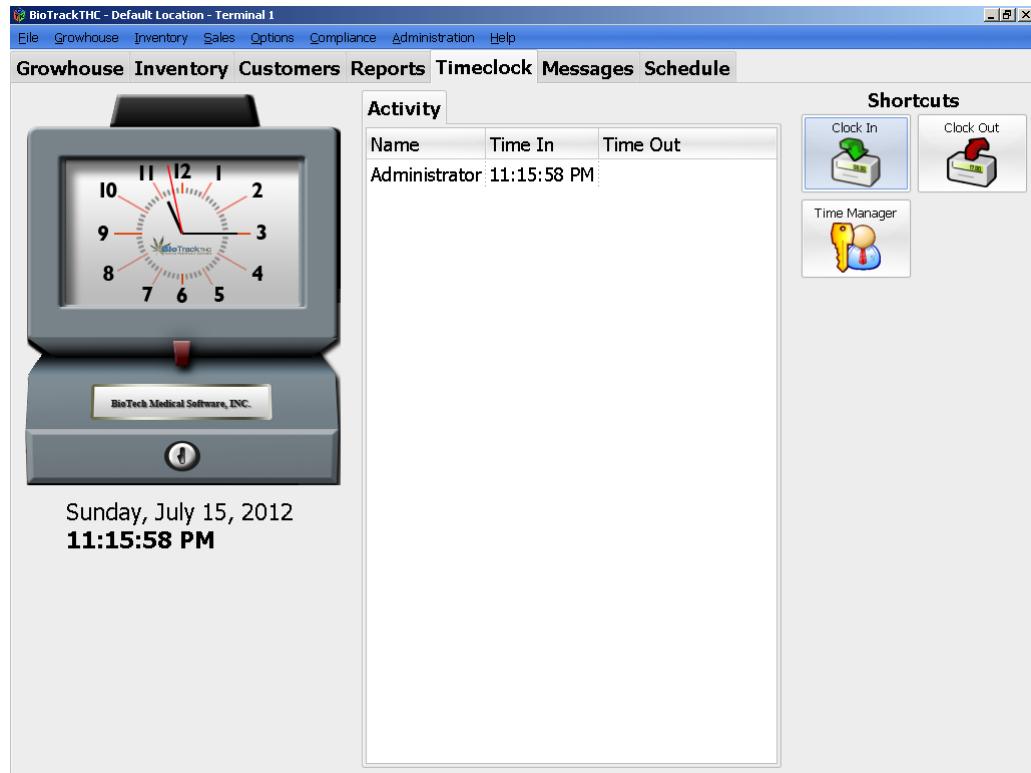
- ✓ Clock in and out
- ✓ Review recent punches
- ✓ Manage previous employee punches

Clocking In

Locking into the system is fairly straightforward. First, navigate to the Timeclock tab. Next, click on the icon that reads Clock In. It will then present a prompt for the user to scan their finger. The screen will look like the following:



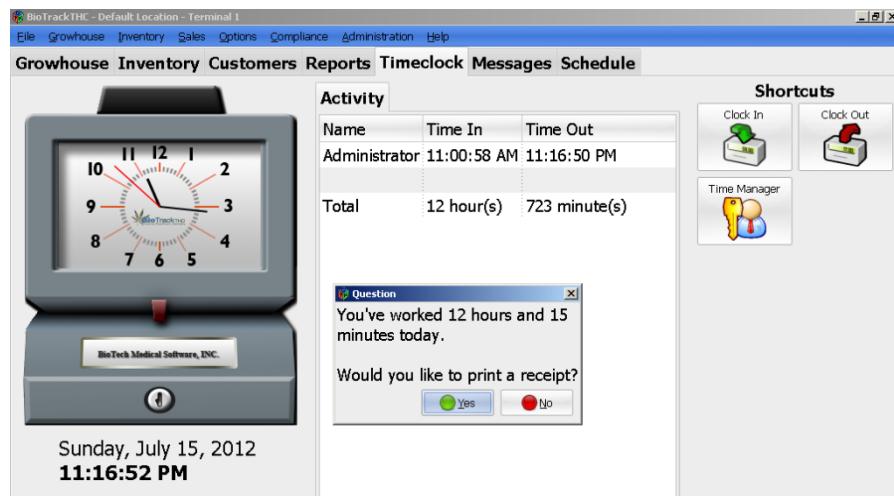
After a valid user scans their finger, they will see the following screen:



It will display that the clock in was successful and show any other recent history for the scanned user.

Clocking Out

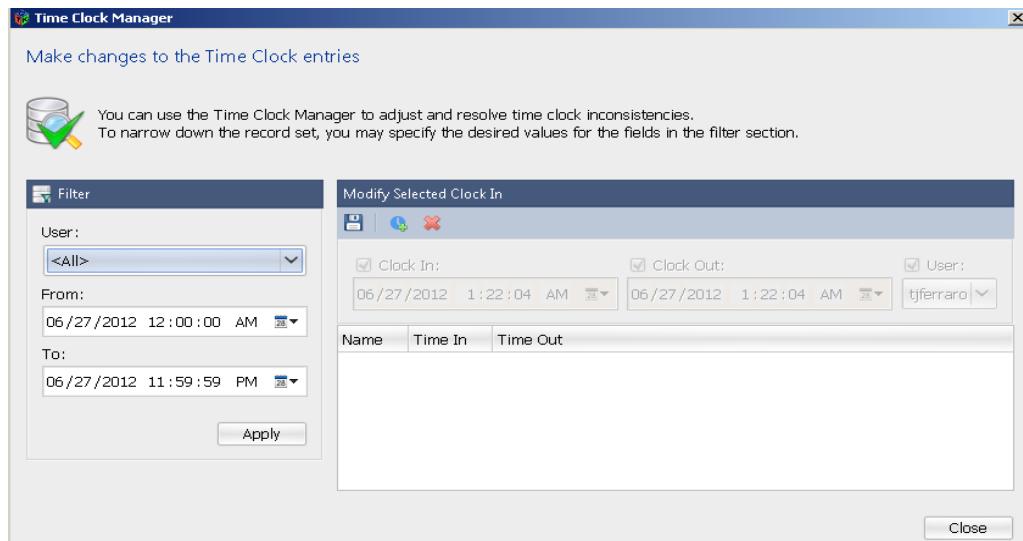
Clocking out is just as easy as clocking in. Simply click on the Clock Out button on the right side of the screen. Once again, it will prompt for a finger scan. Upon a successful clock out, the following popup will appear:



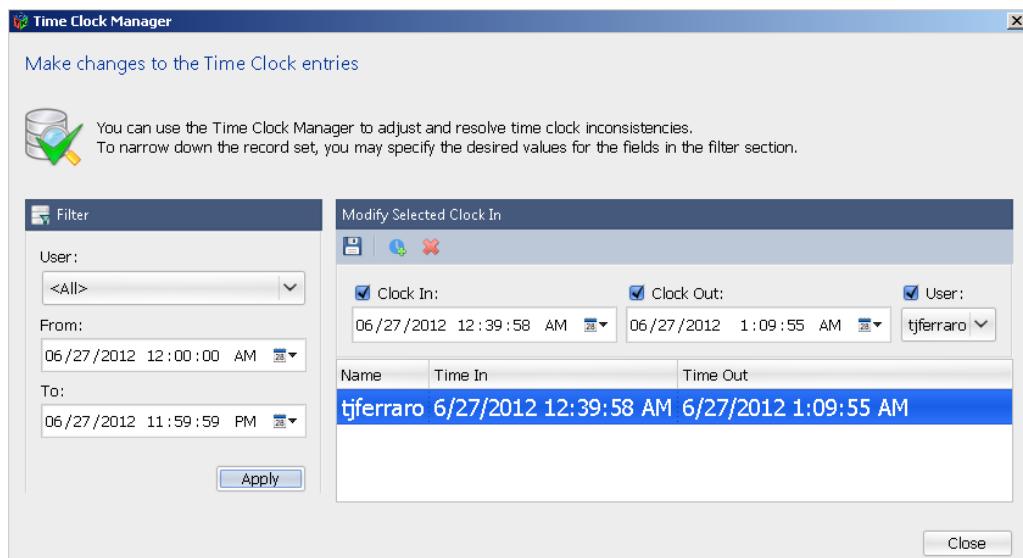
This popup allows a user to print a physical copy of any hours they have accrued for their own records. In addition, the activity tab will display any of their recent (intra-day) punches and a total of their hours at the bottom of the screen.

Time Manager

The time manager allows an administrator or any manager that has been given the proper privileges to modify, add or delete punches from the system. To reach the Time Manager click on the button to the right that says Time Manager.



The left portion of the Time Manager screen allows you to view all punches by all users, or via the User drop-down, select a specific user. In addition, the From and To fields allow you to select the time period to display the punches for. By default, it is set to show the current day.

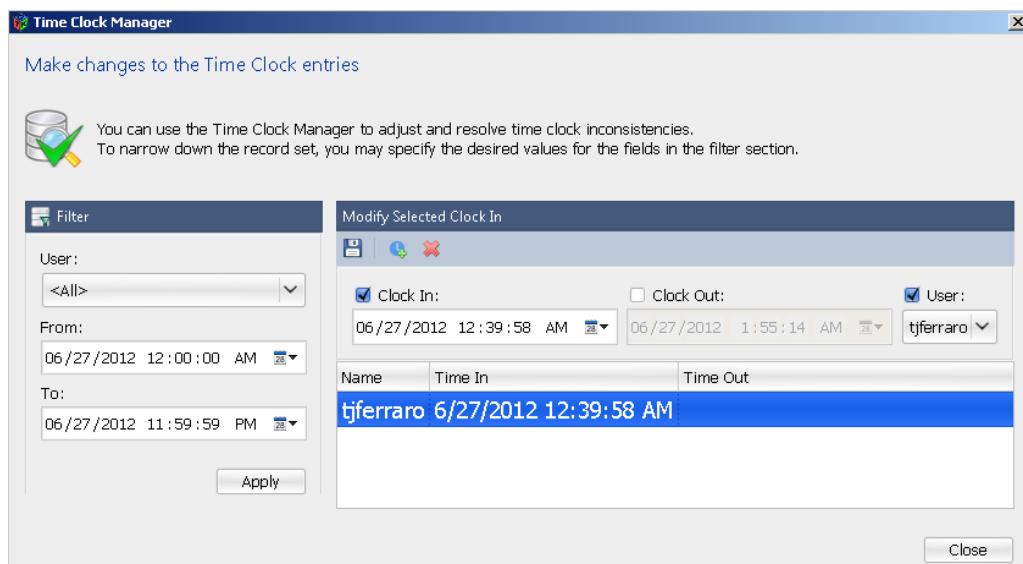


Once Apply has been clicked, the list will appear to the right. By selecting a specific punch, the Save, Copy and Delete buttons will become available. The Save icon is denoted by the small disk, the Copy icon is denoted by the small blue circle with the green plus sign and the Delete icon is denoted by the small red X.

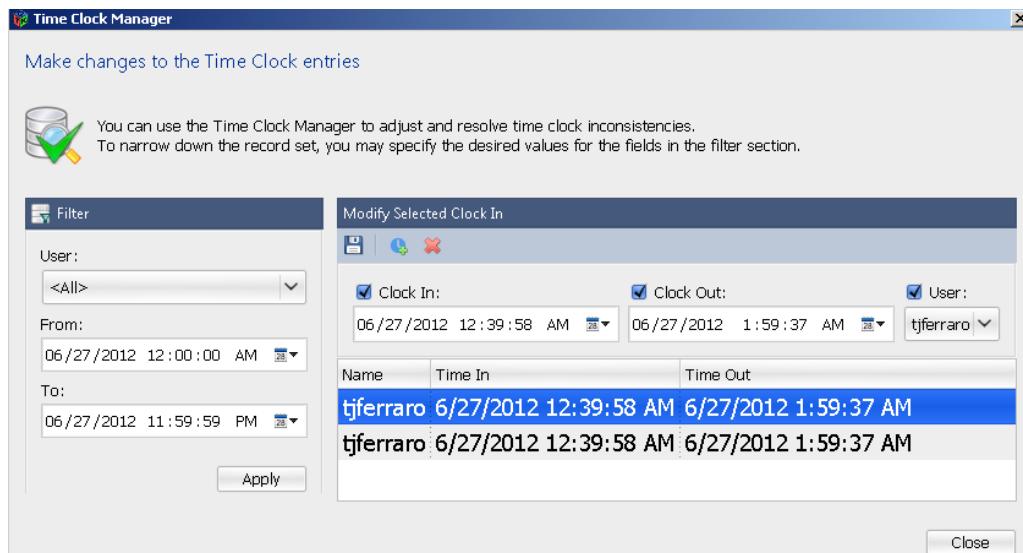
In the example above, the punch has both a clock in and clock out. You may then click on the little calendar icon to pull up a calendar to select a new date or, if you wish, simply click into the date text box and edit the date manually. If for whatever reason, the user on the punch needs to be changed, that is available as well.

Also in the example above, unchecking the Clock Out checkbox, then clicking Save, would remove the Clock Out and allow a user to scan their finger again later to complete the punch.

The following example shows a punch that has not been completed, that is it only has a clock in without a corresponding clock out. To manually complete the process we highlight the punch, then check the Clock Out checkbox. Next, enter in the date and time you wish to set the clock out to. Finally, click on the Save icon to complete the process.



In the following example, we have already highlighted an existing punch and clicked on the Copy icon. This will produce a duplicate punch which we can then highlight, as seen below.



Now the punch can be edited, as necessary, as a completely new punch.

To delete a punch, simply highlight the desired punch and click on the Delete icon.



Chapter 8: Miscellaneous

In this chapter, you'll learn how to:

- ✓ Review the Messages tab
- ✓ Instantly communicate with other users
- ✓ Use the QuickBooks Import feature

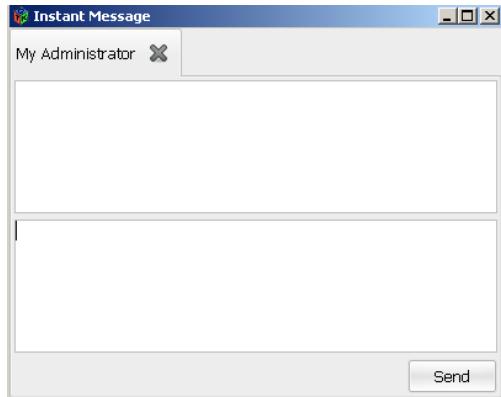
The Messages Tab

The messages tab can be used to communicate with fellow employees directly through BioTrackTHC. There are two main components: The Intra-Email system and the Instant Message system. Here is what the screen looks like:

Date	Sender	Subject	Priority
08/09/2011 2:00 AM	My Administrator	Testing	Normal
08/09/2011 2:04 AM	My Administrator	Hey!	Normal
08/09/2011 2:26 AM	My Administrator	Re: Hey!	Normal

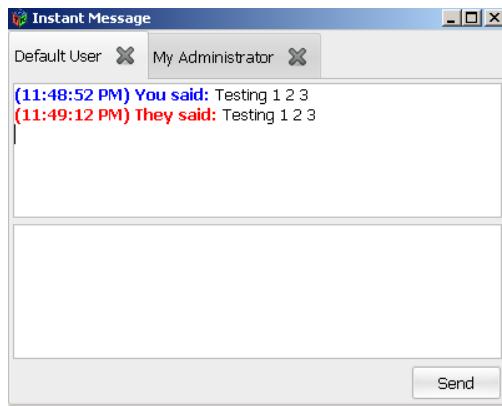
Instant Messaging

An Instant Message can be initiated by double clicking on a Contact from the Instant Contacts list to the right:



The name of the contact will appear in the tab, as shown above. Multiple conversations with different users can be initiated and will appear in the same window, but under a separate tab. Tabs can be closed by simply clicking the X next to the name.

To begin communication, type your text to send and then hit the Enter key on your keyboard or click on the Send button:

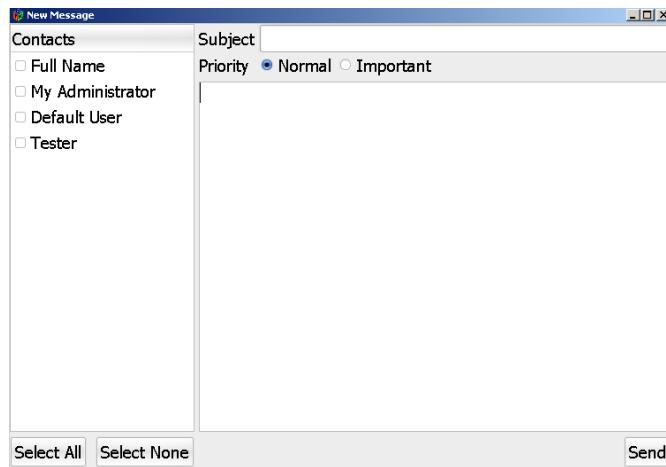


Your messages will appear in blue while their messages will appear in red. If another user initiates a conversation with you, the Instant Message window will automatically popup.

Intra-Email System

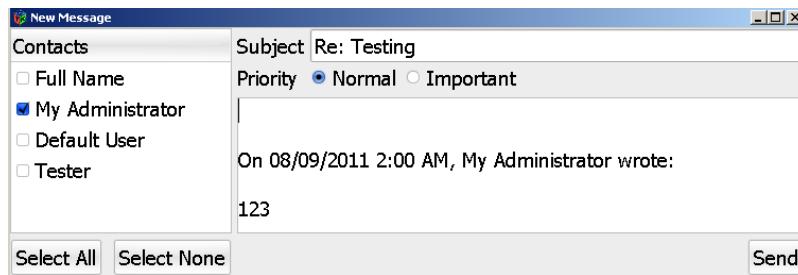
On the main Messages screen is a list of all received intra-emails from other users detailing the date of the message, who sent the message, the subject and also the priority of the message. Once a message has been highlighted, the body of the message will appear in the bottom-most pane of the screen.

To compose a new message, you'll first want to click on the New button. That will then bring up the New Message screen:



You can select the recipients from the left column named Contacts. You'll then want to enter a short Subject that describes the message. If this is a high priority message, you'll want to select Important for the Priority. Otherwise, keep it set to normal. Finally, enter your message in the main pane to the right. Once you have finished composing the message, click on the Send button to send it out.

You can reply or forward a message by simply clicking on the Reply or Forward buttons:



After clicking on the Delete button, you'll receive a confirmation:



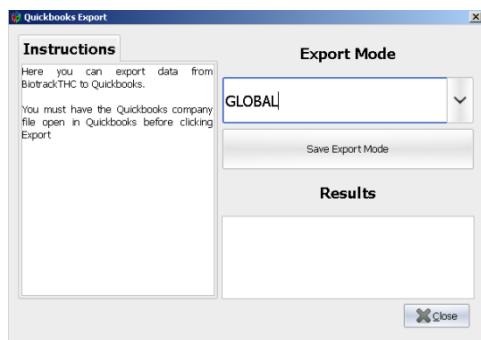
Once confirmed, the message will be removed from the user's specific message store.

QuickBooks Export

The system can be configured to export certain items into your existing QuickBooks files. Some users will do this simply by exporting selected reports from the Reporting system. As the BioTrackTHC system is advancing, this is becoming less and less of a necessity. However, it is there if you should decide to take advantage of it. In addition to that method, however, the system can also import to QuickBooks via the real-time XML over RPC interface. Utilizing this, however, will require the computer you have QuickBooks installed on to also have BioTrackTHC installed, as well. To begin, navigate to the Toolbar and click on Administration, Quickbooks, Export to Quickbooks:



The first time you open this screen, you'll see the following:

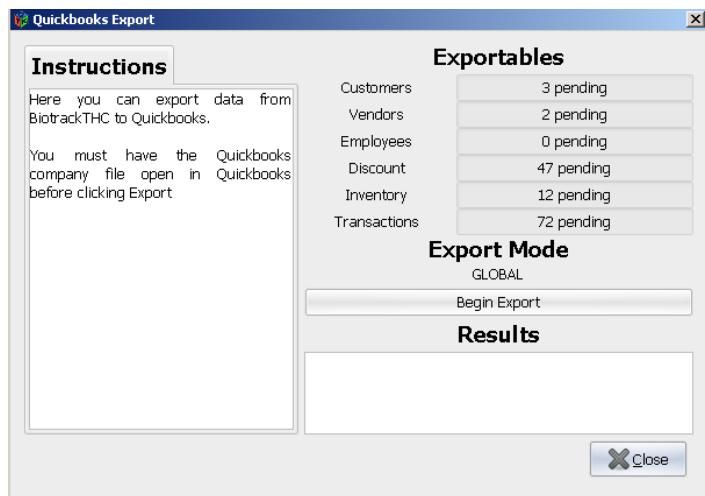


The system will prompt, only for the first time, whether you would like to use GLOBAL or SINGLE import mode. SINGLE mode will only export data on a location by location basis. GLOBAL, on the other hand, will export all of your data from all locations at one time. If you have multiple centers in your system and you already have multiple company files for each of them, you'll probably want to use SINGLE mode.

Once you have selected, click on the Save Export Mode button and click Close.

Now, go ahead and open the export again by navigating to the Toolbar and clicking on Administration, Quickbooks, Export to Quickbooks.

The system will then present a screen similar to the following:

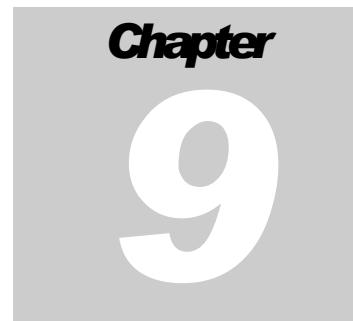


This will list all of the items that are pending export, including Customers, Vendors, Employees, Discounts, Inventory and Transactions.

Make sure your company file is open in QuickBooks and then click on the Begin Export button. The system will inform you of its progress as it proceeds. If your QuickBooks file is not open, you may receive an error like the following:



On the first run, you may need to switch over to your QuickBooks file and confirm that BioTrackTHC is allowed to access its data. If you do not confirm this, BioTrackTHC will be unable to communicate with QuickBooks.



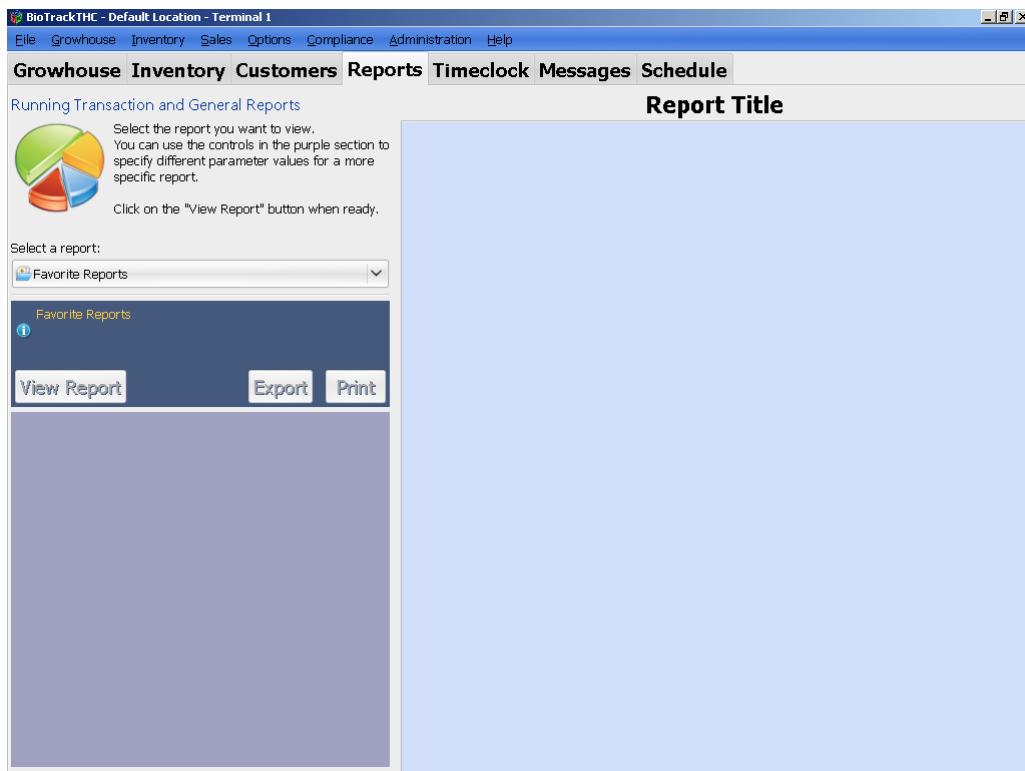
Chapter 9: Reports

In this chapter, you'll learn how to:

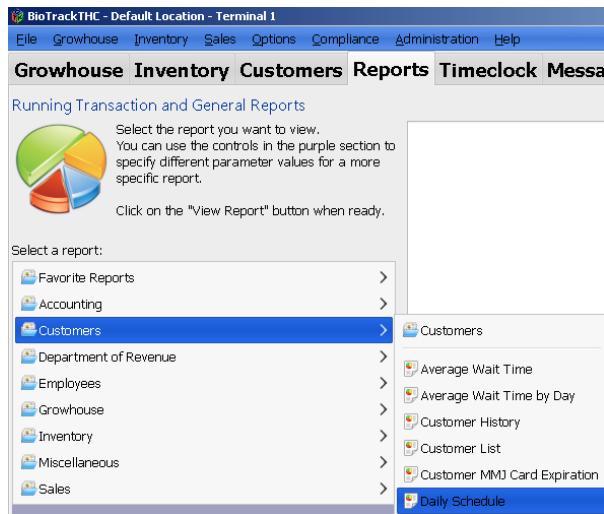
- ✓ Select and run a report
- ✓ Determine which report best suits your needs
- ✓ Set a report as a favorite
- ✓ Create new reports

Selecting a Report

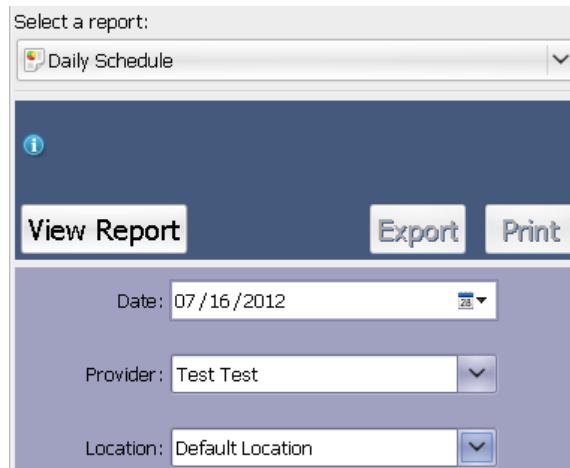
To run a report, first click on the Reports tab. The following screen will then appear. On the left side is where you may select a report from the drop-down that you wish to run. On the right is where the report data will appear.



Reports are divided into categories. In the example below, clicking into the Appointments category shows all of the reports available in that category. Clicking on the Daily Schedule report will then bring up the options for that specific report.



After clicking on the desired report, a number of options will appear.



Once all of the options have been set, click on the View Report button to run the report. If there are any errors with the options set, or if the report requires that an option be set and it is not, the system will alert you and require the parameter be set before proceeding.

When a report has been run, it will populate the text box to the right, as exemplified below:

Time	Name	Status	Phone
9:00 AM			
9:15 AM			
9:30 AM			
9:45 AM			
10:00 AM			
10:15 AM			
10:30 AM			
10:45 AM			
11:00 AM			
11:15 AM			
11:30 AM			
11:45 AM			
12:00 PM	LUNCH		
12:15 PM	LUNCH		
12:30 PM	LUNCH		
12:45 PM	LUNCH		
1:00 PM			
1:15 PM			
1:30 PM			
1:45 PM			
2:00 PM			

Now that the report has been presented, the Export and Print buttons are now available. Clicking Export will allow you to export the report data to a comma separated values file (csv) that can be opened in any spreadsheet like program (e.g. Microsoft Excel).

Clicking the Print button will automatically export and open the file into your internet browser and automatically open the Windows Print prompt. Simply click Print to then print the document.

The rest of this section is dedicated to describing all of the available reports in their respective categories, their options and uses.

Accounting

The Accounting category contains several reports that relate to the accounting system.

Accounts

The Accounts report is designed to allow you to view all of your outstanding accounts receivable and accounts payable. The first option is Age which determines which purchases or sales to show in the last X number of days. The Type drop-down allows you to select whether you are looking for Receivables or Payables. The Location drop-down allows you to select what location, if any, to limit the accounts to. The Account drop-down will list all of your vendors and allows you to select, optionally, one account in particular to only see that account's transactions.

Bad Debts

The Bad Debts report will detail any debts that you have written off or have had written off. The first available options allow you to select a date range, defined by the Start and End and are set to the current day by default. The Location can limit the debts to only a certain location in the system. The Type can be set to Receivable or Payable. The Account drop-down will list all of your vendors and allow you to limit to one specific account's bad debts.

Customers

The Customers category contains several reports that relate to your customers, their purchases, etc.

Average Wait Time

The Average Wait Time report will detail the average wait time your patients had from the moment they were checked in to the moment their batch was submitted. The available options are Start Time and End Time and are set to the current day by default. You may then modify these options to calculate the average wait time over the time period selected. Also, optionally selecting a Location will limit the customers to only a specific location.

Average Wait Time by Day

The Average Wait Time by Day report details the average wait time broken down by day of the week. The only option available is Day of Week, which includes every day Sunday through Saturday. If this option is left blank, it will show the average wait time for every day of the week. You can also select the Location, if you wish. This report does not require a time period and can calculate the average across all check-in data available.

Check-In Report

The Check-In report details all of the customers that have been checked-in including their check-in and check-out time, if they checked out, how long their visit lasted, the location and whether a sale was actually made for that visit. You can select the Start and End time to display and you may also select the Location if you wish.

Customer History

The Customer History report will give you an entire purchase history for one specific customer. You will need to enter into the Search entry box a name such as: "Last, First". Or, you can also pull up a specific customer's history by looking them up through the customer lookup and clicking on the Print History button.

Customer List

The Customer List report details the demographics of all of the customers in the database. The Location drop-down allows you to select a specific customer's location. The Member drop-down allows you to select whether you would only like to display

Members. The Referral Method option allows you to refine the selection by only showing customers who have been referred through the selected method.

Customer MMJ Card Expiration

The Customer MMJ Card Expiration report will allow you to view all of the customers whose MMJ Cards are set to expire within a certain time frame. The Location drop-down allows you to limit the customers to only one specific location. Member allows you to limit your search to only members. The Expires After and Expires Before set the time frame you would like to see; you could change Expires Before to a month from now and see all customers whose cards will expire within the next month.

Daily Schedule

The Daily Schedule report is designed to allow you to view the schedule of any provider on a given day. The available options include the Date, Provider and Location.

New Customer Demographics

The New Customer Demographics report ...

New Customers

The New Customers report will list any customers who have made their first purchase within a certain timeframe. You can change this timeframe by modifying the From and To parameters. The Location drop-down will limit the new customers to one specific location, if you wish. Finally, you can limit the customers to a specific Referral Method.

New Members

The New Members report, like the New Customers report, will list any customers who have made their first purchase within a certain timeframe. However, this also limits the list specifically to members. You can change this timeframe by modifying the From and To parameters. The Location drop-down will limit the new customers to one specific location, if you wish. Finally, you can limit the customers to a specific Referral Method.

Non-Recent Customer List

The Non-Recent Customer List will list any customers that have not visited a particular location during a certain timeframe. The Location drop-down will limit the search to a particular location. You may also further specify your results by whether or not they are a member or how they referred. The Days Since field is the number of days that have passed since a customer has been to the location; the default value is 30 (which can be changed to any amount of days you wish), thus the report will display customers that have not visited your location in one month.

Product Purchases

The Product Purchases Report shows the quantity of a product purchased by a client, how much was money was spent, and on how many tickets the purchases appear for a particular date range. The Location drop-down will limit the search to a particular

location. You may also limit the report to a specific product in the Product drop down menu. If the Product drop down menu is left blank, all products will be displayed.

Referrals

The Referrals report details all of the referral sources and the number of people they have referred. The Start Date and End Date options are available to show the number of referrals over a given time period. By default, the Start and End Date parameters will be set to the current date. You can also limit the report to a specific Location.

Top Customers

The Top Customers report will list all of your top customers within a certain timeframe controlled by the Start and End Time. You can limit to one specific Location by choosing one from the drop-down. The Last Name entry box will let you limit the scope of the customers to a specific last name.

Department of Revenue

The Department of Revenue category contains several reports that are specific to Colorado for regulatory purposes. However, any center may otherwise choose to view these reports as they do contain useful information even to those outside of Colorado.

30% Compliance Report

The 30% Compliance Report will list an amalgamation of the other Department of Revenue reports and place your totals on the standard 30% Compliance sheet. You must choose your OPC (Growhouse) Location and, if you have multiple dispensaries, a Location from the drop-down.

Daily Patient Sales Report

The Daily Patient Sales Report will list all of your customer purchases for a certain timeframe (a day, by default). You can change the Start and End dates, as necessary though. You can also set the report to one specific location through the Location drop-down. The Weighable drop-down will optionally allow you to list only weighable (e.g. Bud) or non-weighable (e.g. Edibles) items.

Employee List Report

The Employee List Report will list all of your current employees as defined in their user permissions. This can be constrained to a specific location through the Location drop-down.

Physical Inventory Sheet

The Physical Inventory Sheet will list all of a center's on hand inventory for the given time period. You must select a Year, Month and Location.

Primary Center Patient List

The Primary Center Patient List will list currently assigned and valid card members. The Location drop-down, optionally, will allow you to only pull one specific location's members.

Transfers From OPC

The Transfers From OPC report will allow you to see all of the transfers from your OPC (Growhouse) to a specific location. Begin by selecting a Location from the drop-down and then selecting the Start and End dates. You can also specify the Location that the transfers were destined for from the drop-down.

Transfers Sales and Purchases

The Transfers Sales and Purchases report will list side by side your customer sales, transfers, wholesale purchases and wholesale sales. You'll need to select the OPC (Growhouse) location, the Year, the Month and the destination Location.

Wholesale Transaction Report

The Wholesale Transaction Report will list with details, side by side, all of your wholesale purchases and sales. You must select the OPC (Growhouse) Location, the Start and End date and destination Location.

Employees

The Employees category contains several reports that relate to your employees.

Sales Stats

The Sales Stats report will detail for a specific time period the volume, averages, etc. on your employees sales. You can change the Start and End Dates to view specific time periods.

Timesheet

The Timesheet report details all of the punches for a specific employee or all employees. The options Start Date and End Date allow you to specify the time period you wish to pull from and are, by default, set to the current date. The Location drop-down will limit the punches to a specific location. The final option is Employee and allows you to select from the drop-down an employee and only pull their specific punches.

Timesheet Log

The Timesheet Log report will display the clock-in time, clock out time, location, and employee for a particular date range. The Location drop-down will limit the search to a particular location. The Employee drop-down list will allow you display the information relevant to a specific employee.

Growhouse

The Growhouse reports offer various details regarding your growhouse operations.

Mother Yields

The Mother Yields report will offer average yield values for your mother plants; that is, how much dry weight the clones off of said mother plants are producing. You can limit this report by Location or Strain, if you wish.

Plant Inventory

The Plant Inventory report will list all of the current plants in your growhouse. The Location drop-down allows you to a specific location and selecting it is recommended. The Phase allows you to only select plants that are Growing, Drying, etc. The Strain drop-down will qualify the list based on the strain. The Room drop-down can limit to plants in a specific growhouse room. The Patient textbox allows you to enter a specific MMJ Card number and only see that patient's plants. The Destination drop-down can be used to only display those plants intended for a specific dispensary.

Removed Plants

The Removed Plants report will list any plants that have been removed (deleted) from your system during the selected time period. You can modify the time period by modifying the Start Date and End Date. The Location drop-down can limit this to one specific Growhouse, if you have more than one within the system. The Strain drop-down can limit the search to one specific strain.

Strain Counts

The Strain Counts report will display the location, strain name, and the total quantity of each strain in a particular location. The Room drop-down can limit the report to a particular room.

Waste

The Waste report will list any derivatives from your Growhouse that have been discarded as waste. You can limit the report time period by the Start and End parameters. The Location drop-down will also only show waste records from a specific location.

Yields

The Yields report will list, for a selected time period, the wet and dry weights of your plants that have come out of the Growhouse. You can constrain the time period by the Start and End Times. The Strain drop-down will only list yields from a specific strain. The Location drop-down will only list yields from a specific location.

Yields Forecast

Inventory

The Inventory reports offer various details regarding your inventory past and current.

Current Inventory

The Current Inventory report will show all of your inventory current in the system. You can choose to constrain by a specific Location from the drop-down. The Room drop-down will only list the inventory in a specific Inventory Room (if you have enabled them). The Strain drop-down will allow you to only view a specific strain's inventory. The Product drop-down will limit by a specific product. The Category drop-down will constrain by the category of the inventory items. The Type drop-down can limit by specific types of inventory (e.g. Bud, Shake, etc.). The Grouping option, if set to Yes, will group products together and only show the totals whereas setting this to No will show each individual barcode.

Historical Inventory

The Historical Inventory report is almost identical to the Current Inventory report, except that it allows you to select a Date to show what the current inventory looked like on that specific date. You can choose to constrain by a specific Location from the drop-down. The Room drop-down will only list the inventory in a specific Inventory Room (if you have enabled them). The Strain drop-down will allow you to only view a specific strain's inventory. The Product drop-down will limit by a specific product. The Category drop-down will constrain by the category of the inventory items. The Type drop-down can limit by specific types of inventory (e.g. Bud, Shake, etc.). The Grouping option, if set to Yes, will group products together and only show the totals whereas setting this to No will show each individual barcode.

Inventory Adjustments

The Inventory Adjustments report will list all of your individual inventory adjustments for a time period. You can modify the time period by changing the Start and End dates. The Location drop-down allows you to only show adjustments from a specific location.

Inventory Audits

The Inventory Audits report will list all of your inventory audits for a time period with the items that were modified and the amounts. You can modify the time period by changing the Start and End dates. The Location drop-down allows you to only show adjustments from a specific location.

Inventory Conversions

The Inventory Conversions report will list any inventory conversions over a given time period. For example, when a batch of stems are converted to hash oil. You can modify the Start and End times and also the Location.

Inventory Forensics Report

The Inventory Forensics Report provides a detailed account of all inventory for a specific date range. Name, previous quantity, new quantity, date, the action taken to cause the change, and the user who initiated the action are all displayed. Utilizing the drop downs can limit the report by Location, Strain, Product, and Category.

Inventory Room Transfers

The Inventory Room Transfers report will list any inventory room transfers over a given time period between one room and another in your inventory. You may change the Start and End times and constrain to a specific Location.

Inventory Transfers

The Inventory Transfers report will list all inventory transfers, both location to location and wholesale, that have occurred over a date range defined by the Start and End Dates. The Location drop-down will only show transfers in or out of a specific location. The Direction drop-down can constrain to either Inbound or Outbound transfers. The Vendor drop-down will allow you to only display transfers to a specific vendor. The Strain drop-down will list only transfers related to a specific strain.

Products

The Products report will display a list of all of your existing products and include the following information: Name, Category, Tax Category, Location, Strain (where applicable), Member Discount, Requires Weighing, Is Medicated, Requires Inventory, Default Vendor (where applicable), Default Usable (where applicable, in the case of non-weighable items) and Cost Per Unit. The Location drop-down will only show products available in a specific location. The Strain drop-down can be selected to only show products that have been assigned to a specific strain. The Category drop-down will only display products in a specific category. The Tax Category drop-down will allow you to constrain by which items have been tax exempt and which ones have not. The Vendor drop-down can display any products that have been associated with a specific vendor. The Requires Inventory drop-down will allow you to show or hide products that require inventory or ones that do not. The Weighable drop-down can display only weighable or non-weighable products that have been input into the system. The Member Discount drop-down will allow you to display products which have or have not been set as eligible for a member discount. Finally, the Medicated drop-down will allow you to display only medicated or non-medicated products, if you wish.

Logs

These Logs detail the various changes made to the Product Categories, Products, and Strains.

Product Categories Log

The Product Categories Log details the changes made to any Product Categories, including deletion. The report lists the changes made, the employee who made the changes, and the date on which the changes occurred.

Products Log

The Products Log details the changes made to any Products, including deletion. The report lists the changes made, the employee who made the changes, and the date on which the changes occurred.

Strains Log

The Strains Log details the changes made to any Strains, including deletion. The report lists the changes made, the employee who made the changes, and the date on which the changes occurred.

Miscellaneous

There are a couple reports that don't quite relate to any category in particular so they are grouped here.

Backup Log

The Backup Log report details the success or failure of the last X number of automated database backups. The one option, named Count, is defaulted to 30 such that it will display the last 30 backup details. This is an important report as it ensures that your system is consistently being backed up properly.

Patient Ratio

The Patient Ratio report will show a summary of how many plants, inventory and members there are in the system. There are no options for this report.

Sales

There are many reports available that can display your sales data.

Best Sellers

The Best Sellers report will show which the top selling products for a time period. The Start and End Date will constrain the period to show the sales for. The Top textbox which defaults to 20, allows you to select how many products to show. The Location drop-down will only show sales for a specific location.

Best Sellers By Quantity

The Best Sellers By Quantity report will show which the top selling products by quantity for a time period. The Start and End Date will constrain the period to show

the sales for. The Top textbox which defaults to 20, allows you to select how many products to show. The Location drop-down will only show sales for a specific location.

Cash Close

The Cash Close report will show the details of any cash close procedures (including how much the till was off, etc.) for a given time period. You can modify the time period by adjusting the Start and End Dates.

Complex Sales Report

The Complex Sales Report will show significant details about your entire operation including sales, wholesale, cash close, number of new customers, etc. This report will open up into a new browser window when run. You can change the Start and End Dates to show a different time period. The Location can limit the report to one specific location.

Discount Report

The Discount Report will show a summary of all the discounts that have been used for a time period. The Start and End Date will constrain the report to only show discounts for a certain period. The Location drop-down will further constrain the discounts to ones only used at a certain location.

Discount Report By Employee

The Discount Report By Employee report will show a summary of all the discounts, by Employee, that have been used for a time period. The Start and End Date will constrain the report to only show discounts for a certain period. The Location drop-down will further constrain the discounts to ones only used at a certain location. The Employee drop-down allows you to select one employee in particular, if you wish.

Discount Report By Item

The Discount Report By Item report will show a summary of all the discounts, by Item, that have been used for a time period. In comparison to the previous reports, this one will also show the reason for a discount, if it was an Instant Discount. The Start and End Date will constrain the report to only show discounts for a certain period. The Location drop-down will further constrain the discounts to ones only used at a certain location. The Employee drop-down allows you to select one employee in particular, if you wish.

Payments

The Payments report will list a summary of all payments including method, amount, etc. The Start and End Date will constrain the report to only show discounts for a certain period. The Location drop-down can be used to only show payments at a specific location. The Customer Name drop-down offers the option to hide a customer's name and instead show their MMJ Card number. The method drop-down can be set to only show a specific payment method.

Payouts

The Payouts report will show the payouts, if any, for a given time period. It will list the amount, reason for the payout, who initiated it, etc. The Start and End parameters will control the time period to display the payouts for. The Location drop-down can be set to only show the payouts for a specific location. The Terminal drop-down can be set to only show payouts from one specific terminal.

Sales Counts By Hour

The Sales Counts By Hour report will, for a given time period, display the busiest hour (e.g. 3 PM). The Start and End parameters control the time period to take into consideration when showing the summary. The Location can further constrain the report to only take into account sales from a specific location.

Sales Counts By Weekday

The Sales Counts By Weekday report will, for a given time period, display the busiest weekday in a week (e.g. Friday). The Start and End parameters control the time period to take into consideration when showing the summary. The Location can further constrain the report to only take into account sales from a specific location.

Sales Counts By Weekday and Hour

The Sales Counts By Weekday and Hour report will, for a given time period, display the busiest weekday and hour (e.g. Friday 3PM). The Start and End parameters control the time period to take into consideration when showing the summary. The Location can further constrain the report to only take into account sales from a specific location.

Sales Demographics

The Sales Demographics report details the percentage of visitation, the amount of money spent, and the percentage by amount for Members and Non-Members based on zip code, city, and age. This report can be limited to a specific location if desired.

Sales Report

The Sales Report displays basic customer sales information, normally for a specific day, but can be set for any date combination through the Start Time and End Time. The Location drop-down can constrain the report by a specific location. The Customer Name drop-down can remove the customer's name from the report and instead show the MMJ Card number. The Tax Exempt drop-down can be set to only show taxable or only show non-taxable sales.

Sales Tickets

The Sales Tickets report is similar to the Sales Report, except instead of just listing basic sales data it also lists the items purchased, whether a manual or integrated scale was used, etc. The Start and End parameters control the dates for the data and they default to the current date. The Location drop-down can constrain the report by a specific location. The Employee drop-down allows you to select a specific employee's sales tickets. The Customer Name drop-down can remove the customer's name from the report and instead show the MMJ Card number.

Sales Trends

The Sales Trends report displays trend data based on a Sum. Options available in the Sum drop-down are Sales Totals, Sales Total by Product, Sales Total by Category, Sales Total by Inventory Type, Quantity Totals by Product, Quantity Totals by Category, and Quantity Totals by Inventory Type. The report can also be sorted by day, week, or month and be limited to a particular location.

Voided Tickets

The Voided Tickets report is identical to the Sales Tickets report, except that it will only display tickets that have been voided. The Start and End parameters control the dates for the data and they default to the current date. The Location drop-down can constrain the report by a specific location. The Employee drop-down allows you to select a specific employee's sales tickets. The Customer Name drop-down can remove the customer's name from the report and instead show the MMJ Card number.

Weigh Heavy

The Weigh Heavy report details the product and weight of transactions that were processed Weigh Heavy. The report can be further narrowed by location and employee.

Wholesale Payments

The Wholesale Payments report can potentially list sales or purchases to vendors in a similar manner to the Payments report. The Start and End parameters determine the time frame of the transactions. The Location drop-down determines what location to display the transactions for. The method drop-down allows you to only show transactions that were made with Cash, Credit, etc. The Transaction Type choice allows you to limit only to Sales or Purchases. The Vendor drop-down allows you to select only transactions that relate to a specific vendor.

Wholesale Report

The Wholesale Report is a wholesale version of the Sales Report. For a given Start and End Time, you can view the sales data related to wholesale transactions. You can constrain by Location and also select whether you would like to view Sales or Purchases.

Wholesale Tickets

The Wholesale Tickets report is a wholesale version of the Sales Tickets report which displays details on the wholesale transactions including the item details. To specify the date, you can select a specific Start and End parameter. The Location drop-down determines the location, if any, to display the tickets for. The Employee drop-down allows you to constrain to one specific employee's transactions. The Type drop-down allows you to choose whether to display Sales or Purchases.

Worst Sellers

The Worst Sellers report will show which products are not selling very well for a time period. The Start and End Date will constrain the period to show the sales for. The

Bottom textbox which defaults to 20, allows you to select how many products to show. The Location drop-down will only show sales for a specific location. The Minimum allows you to select a minimum number of sales for a product to appear on this list.

Worst Sellers By Quantity

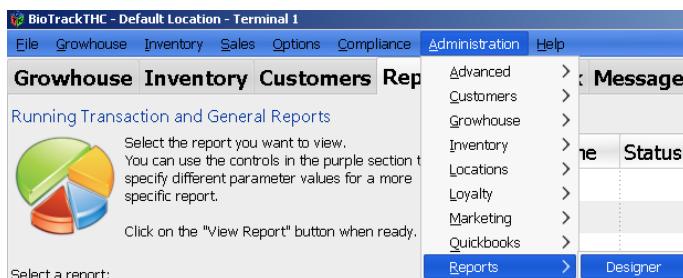
The Worst Sellers By Quantity report will show which products are not selling very well for a time period, specifically, by the quantity. The Start and End Date will constrain the period to show the sales for. The Bottom textbox which defaults to 20, allows you to select how many products to show. The Location drop-down will only show sales for a specific location.

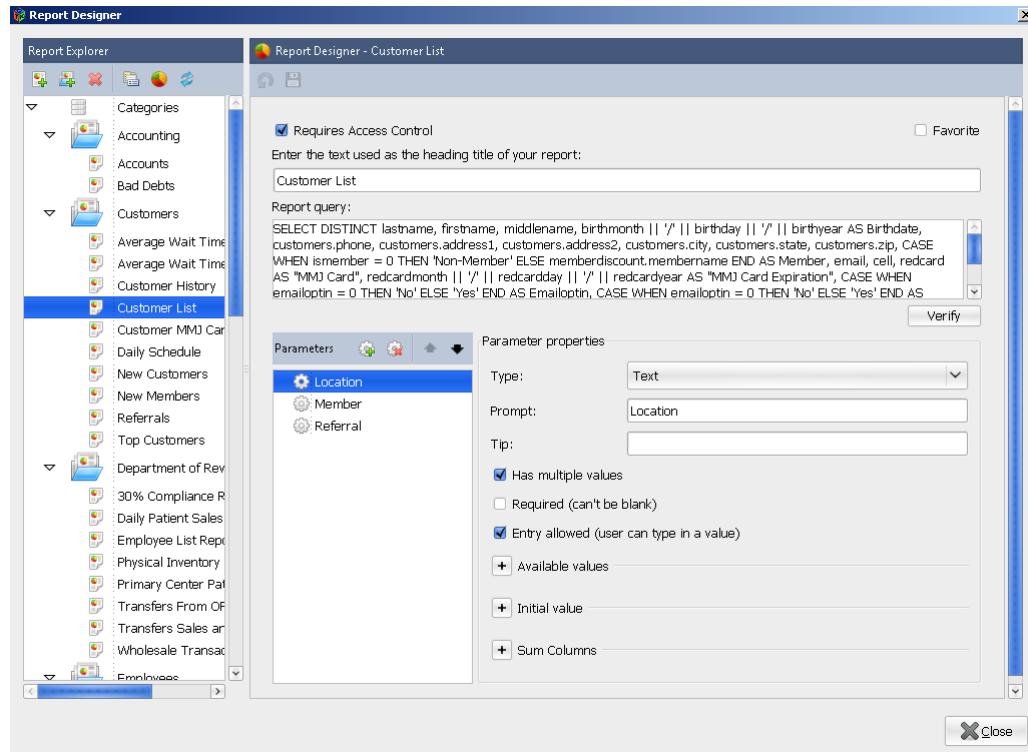
Z-Out

The Z-Out report will display a cash, sales and tax summary for a location for a given time period (normally a day). You can specify the Start and End parameters to another day or a longer time period, if you wish. This report requires you also to specify a specific Location. You can also, optionally, select a Terminal from the drop-down. When a cash close procedure is completed, this report will normally be run automatically with the specific Terminal selected.

Setting a Report as a Favorite

To set a report as a favorite report, navigate to the Toolbar, then click on Administration, Reports, Designer, as can be seen below:





Once the Report Designer interface has been clicked, the previous screen will appear. By clicking on a report name to the left, that report design will become active. In the top right corner of the screen, you'll find a checkbox named Favorite. By checking off the box and clicking on the Save disk at the top of the screen, the selected report will now be listed under the Favorite Reports category.

The Report Designer

The Report Designer allows you to modify existing reports and create new ones. It is designed primarily for users who have at least a basic knowledge of the SQL database programming language. If this does not describe you, it's probably best not to attempt creating your own report. BioTrackTHC is constantly improving and adding new reports, so if the report you're looking for is not in the system yet, it probably will be eventually.

The Report Designer is laid out with the Report Explorer on the left hand side. This lists all of the available categories and all of the available reports within those categories. The right side of the screen is where all of the available report options are displayed. The Requires Access Control checkbox ensures that, to run the selected report, a user must have been explicitly given the privileges to do so. The Favorite checkbox allows a user to set a report as a Favorite report. The heading title entry box allows you to set the name of the report that appears at the top of the screen when the report is run. The Report Query entry box allows the user to enter a dynamic SQL query in the box. The parameters allow a user to let create dynamic parameters that the user can select every

time the report is run, including a date or even dynamic data pulled directly from the database.

To create a new report category, click on the icon that is second from the left under the Report Explorer. When in doubt, hovering over an icon will explain what the icon does. When prompted, simply type in a new name and, optionally, a description.

Creating a new report can be accomplished by first clicking on a report category. Then, click on the first icon to the left under the Report Explorer named Insert Report. Type in a name for the report and, optionally, a description.

Now that the report exists, highlight it to make it the active report. You'll next want to set the heading title, which will most likely be the same as the Report Name.

Next, optionally, you may want to add parameters to the report for your users to be able to configure on the fly. To add a new parameter click on the gear icon with the green plus sign on it. The gear icon with the red X will remove the selected parameter. The up and down arrows control the order in which the parameters appear. The available types are: Date, Time, Date and Time, Yes/No, Text, Long Text, Integer, Decimal and Money. The text, datetime and integer types are the most common.

Once a type has been selected, the Text type, for example, now you will want to set the Prompt, or the name of the option that will appear to the user. The Tip entry box allows you to enter text that gives the user useful information about what the parameter actually does.

The checkbox titled Has Multiple Values should be checked if the will require a drop-down with multiple possible choices. In cases where a user needs to type a value in, or select a date, this should not be checked. The Required checkbox ensures that, if the parameter is necessary for the query, the user must select or input a value before running the report.

The entry allowed checkbox sets up the parameter such that it will allow a user to type into the parameter box. This can also be used for drop-downs, if desired.

The Available Values box can be contracted or expanded and is able to be used when the Has Multiple Values checkbox is toggled. Once active, you may select whether the available values are queried or non-queried. Non-queried values are to be entered in the following format, without, of course, including the quotation marks: “0~Sunday;1~Monday;2~Tuesday;3~Wednesday;4~Thursday;5~Friday”. The first value denotes what will be sent to the query, the ~ character separates the value, the third part determines what the user actually sees as their choices. The queried option is simply a standard SQL query, where two columns are selected, the first being the value that will ultimately be input into the report query, and the second value being what is displayed to the end user. The Initial Value box is exactly the same as the Available

Values box in look, however it only takes one value which would be the default option selected. So, for a non-queried result that could be as simple as entering 0. For a query, that could be as simple as adding a LIMIT 1 clause to the available values query.

The Sum Columns expansion is forced to be left at non-queried. It is only valid if it is set on the first parameter, or rather, the top-most one in the parameters list. It is a simple comma delimited list of columns that you wish to see totaled, or summed, at the bottom of the report. For example, to show the bottom totals of the first two columns, this would need to be input as: 1,2

Finally, the main report query must be a standard SQL statement. If there are parameters being used, they can be added to the query by prefixing the case sensitive name of the parameter with a dollar sign. For example, if a parameter was named DayofWeek, and it required a user to select a specific day of the week, you could then reference in the query: WHERE EXTRACT(DOW FROM to_timestamp(time)) = \$DayofWeek.

Server side function inputs can also be used, as long as they result in a valid SQL query. For a good reference point on creating your own reports, it's recommended that you first review some of the reports that already exist. This should help you well on your way to customizing the system to the fullest extent.



Chapter 10: Troubleshooting

In this chapter, you'll learn how to:

- ✓ Troubleshoot for yourself many of the most common issues
- ✓ Run the remote help application

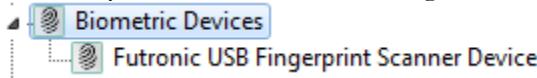
White or frozen screen when first loading program

If, when initially running BioTrackTHC, the window appears, but the login screen never shows up, and the window seems frozen, this indicates a problem with one or more of the fingerprint scanners. This can happen if, for whatever reason, they fail to initialize but do not inform the program.

1. Try unplugging the finger device(s) from the USB port and then plugging them back in.
2. If step 1 fails, try to instead plug them into different USB ports. Then reboot and try again.
3. If neither of these works, the next step is to go to the Windows Control Panel, and double click on System. Next, click on the Hardware tab and click on Device Manager. In Windows XP/Vista, you'll be looking for the following:



On Windows 7 or later, you will instead be looking to locate this:



You may need to first click the + sign on the category before the device actually shows on the screen. Next, right click on the device and click Uninstall. Next, unplug the device from the USB port and re-plug it back in. Windows will then take a moment to re-recognize the device and install the drivers. Once it has done so, reboot, and try loading the program again.

4. If the previous steps are unsuccessful, and you have another computer with a biometric scanner connected, the next step is to try swapping the finger scanners and determine if the program now loads. If this is successful, you will then want to determine if the non-working device actually works on the swapped computer. There is a good chance that it will. If it does not, then the device itself is malfunctioning and will need to be warrantied. The warranty information for the Futronic biometric scanners can be found at the end of this [chapter](#).

Barcode scanner only scans one item

If your barcode scanner is able to scan one item, or if it scans an item but does not submit the number to the system, your barcode scanner is not sending a carriage return character after scanning.

1. Most barcode scanners do by default, but some come with an instruction manual containing barcodes that can be scanned to toggle various features, including sending a carriage return. This is the preferred fix.
2. If, for whatever reason, the barcode scanner manual cannot be located, you can try toggling the system to not expect a carriage return by navigating to the BioTrackTHC Toolbar, then click on Options, Misc, Barcode Scanner. You may then uncheck the Return checkbox and the system will know not to expect a carriage return after each scan.

Unable to print

If you attempt to print a report, but nothing happens, this indicates a problem with your printer and not with BioTrackTHC. However, you'll find below some common steps that can be taken to try to remedy the problem.

1. First, look for a little printer icon in the Windows toolbar at the bottom of your screen. If you see one, double click it. There may be many jobs already pending, and one in particular could be clogging the queue up. Click on the word Printer in the top left corner of the print jobs window, and then click on Cancel All Documents. This should remove all documents from the queue. If one still remains, you will need to reboot.
2. If the printer icon is not in the bottom right hand corner of your screen, you will need to open up the print jobs window manually. Begin by going to the Start Menu, then look for Printers. If you do not see Printers, instead look for Control Panel. Once in the Control Panel, you can then get to the Printers screen by looking for Printers and Faxes. Next, double click on the printer in question and follow the same steps as above to remove all items from the print queue.
3. If there are still items remaining in the queue, and rebooting was unsuccessful, you may then need to right click on the printer in the Printers screen, click on Delete, reboot, and windows should then be able to re-add the printer upon startup without items in the queue.

4. Another item of note to check is whether or not in the print queue screen it says Offline Mode. If it does, you may simply be able to fix the problem by clicking on Printer in the Toolbar and then unchecking Use Printer Offline.
5. Making sure that the printer is actually turned on and connected to the computer is also an often overlooked fix.
6. Unplugging the printer's USB cable from the computer and then re-plugging it in can also fix such a problem.
7. Power cycling the printer itself is also a good idea and may fix the problem.
8. If none of the steps above fix the problem, you should inspect the printer directly to see if it is issuing any warnings including out of paper, paper jam, etc.

Unable to connect to your database

If you are ever presented this error, the system's built-in connection troubleshooting wizard will attempt to determine why you are unable to connect.

1. The most common reason for this error is if the computer where the server is installed on has been turned off and, as such, clients will no longer be able to connect to it.
2. Other common issues include a router or cable modem error where either one or both need to be rebooted.
3. If at least one terminal is able to connect to the server, then you can actually rule out a server error and assume that it is an error on the terminal itself. In such a case, make sure that the computer is able to connect to the network and the internet, as a failure to do so would be a clear indicator of a networking problem. Ensure that all network connections into the terminal are tight and secure.

Unable to scan

If you are unable to scan documents and you were able to previously, or if you have successfully selected the TWAIN interface as described in a previous [chapter](#), then this indicates an issue with either the scanner itself or the scanner's TWAIN drivers. Although such an issue is not directly related to BioTrackTHC, here are a couple of tips to remedy the problem.

1. Unplug the USB scanner from the computer and re-plug it back in.
2. Power cycle the scanner.
3. Reboot the computer.

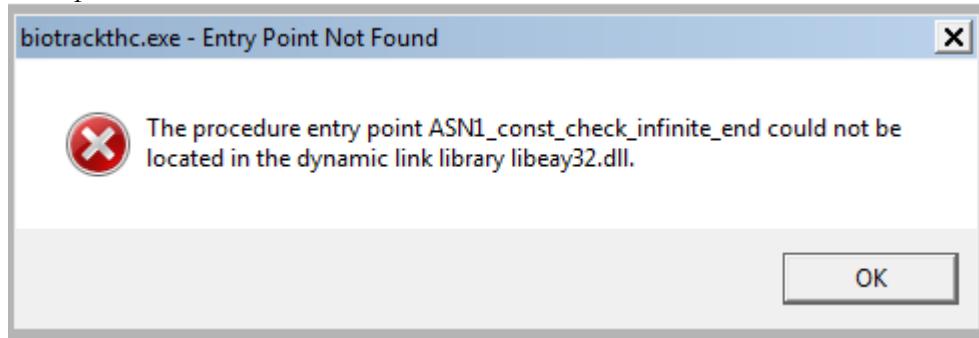
SSL Certificates

If you ever receive an error regarding SSL certificates not being found, there is an easy way to remedy the situation. On your original installation CD, you'll find a file named `sslcerts.zip`. It contains three folders: `BioTrackTHCssl`, `BioTrackTHCssl1`, `btmsissl`. There are two files named `postgresql.crt` and `postgresql.key` in the `BioTrackTHCssl` folder and they should be placed on the client terminal in the folder: `%AppData%\postgresql\`. `%AppData%` is a system

variable that will take you to the proper location regardless of the Windows version. There are three files ending in .pem in the BioTrackTHCssl1 folder and they should be placed into the BioTrackTHC directory, which is located at C:\Program Files\BTMSI\BioTrackTHC or C:\Program Files (x86)\BTMSI\BioTrackTHC. Four files ending in .crt and .key are located in the btmsissl folder and should be placed into the PostgreSQL data folder on the server, located at C:\Program Files\PostgreSQL\9.0\data or C:\Program Files (x86)\PostgreSQL\9.0\data.

Entry Point Not Found

This error will read as something to the effect of “The procedure entry point ASN1 ... could not be located in the dynamic link library ...”. It will then either refer to a file named libeay32.dll or ssleay32.dll, as shown in the example screenshot below:



This can happen if another program has been installed that (incorrectly) placed an older version of the OpenSSL libraries into a Windows system directory. In order to proceed, you will need to either remove or rename those offending files.

On Windows XP the easiest way would be to click on the Start Menu, Search, For Files or Folders. Then click on All Files or Folders, then enter libeay32.dll (or ssleay32.dll if that is the reported conflict) and click Search. This will then present you with all matching files on the system. The offending files will be located somewhere in the Windows PATH, e.g. C:\Windows, C:\Windows\System32, etc. It is recommended that instead of deleting the files you simply rename them to, e.g. libeay32.dll.bak, just in case they are needed later.

On Windows Vista/7, click on the Start Menu button, enter libeay32.dll (or ssleay32.dll if that is the reported conflict) and then click on See More Results. The click on Computer where it asks “Search again in”. As mentioned above, you will want to rename any files found in the Windows or other system path.

Be sure not to rename or remove the dll files found in the BioTrackTHC folder as these will show up in a search of the entire hard drive.

Common Mistakes

During the course of using the system, there are common mistakes that can arise. The following are a few of the most common ones with their solutions:

I've cured a plant, but it's not in my inventory

This can happen if you meant to set a plant to “Batch Now”, but instead clicked “Batch Later”. To “recover” the plant and make sure it gets moved into inventory with a new barcode you’ll want to review Chapter 3, section Creating Batches, subsection [Items already weighed](#). This section will guide you on batching plants that have been set to “Batch Later”.

My product says no inventory available, but I can see there is

If an item is in inventory, but it has not been properly assigned to a product, your sales screen will NOT report inventory as being available. That is, you could have Blueberry bud sitting in inventory, but if the Product field is empty, it will not be available for sale. Checking this is as simply as scanning the barcode (or double clicking on the inventory item) while on the Inventory screen. This will bring up the Inventory Details screen and if the Product drop-down is not assigned correctly, you can re-assign it now and save by clicking the OK button. Please see Chapter 4, section Current Inventory, subsection [Inventory Details](#) for further details on this screen.

Remote Help

If you require remote assistance, the system automatically installs TeamViewer to make this much simpler. If BioTrackTHC is already open, simply navigate to the Toolbar and click on Help, Remote Help:



If the program is not open, you should find an icon on your desktop named BioTrackTHC Remote Help. Or, if it's not there, you may also find it by navigating to the Windows Start Menu, then clicking on All Programs, then look for the BioTrackTHC folder, the Help subfolder and finally BioTrackTHC Remote Help. The Remote Help will then offer an ID number and password to give to tech support. Tech support may be reached at 800-797-4711.

Biometric Scanner Warranty

The Futronic biometric scanners come with a 1 year limited warranty. The full details of their warranty can be found at: http://www.futronic-tech.com/product_warranty.html or, they can be reached for further return information at inquiry@futronic-tech.com.