



LEAF

DATA SYSTEMS

POWERED BY MJ FREEWAY

DRAFT

Leaf Data Systems
State of Washington
User Manual v 0.6
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UI Business Workflows

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Producer Facility Workflow Steps and Related API Calls

Business Process	Sub Processes	UI Component	Related API Calls	Description
Manage Users	Set Up Users Modify Users Inactivate Users Change Status/Privileges Set/Reset MFA	Menu: Users Option: Add	user (get) user (create) user (update)	User profiles give authorized individuals access to licensee facility data.
Manage Areas	Add area Assign Global ID Name Area Assign External ID Assign Area Type	Menu: Data Entry/Areas Option: Add	area (create)	Areas represent physical locations at licensed facilities where plants and inventory will be located.
	Modify area Edit Name Edit/Add External ID Reassign Area Type Delete Area	Menu: Data Entry/Areas Option: Modify (pencil)	area (get) area (update)	
Manage Strains	Add Strain Assign Global ID Name Strain Assign External ID	Menu: Data Entry/Strains Option: Add	strain (create)	Strains must be created for all strains of plants or strain-specific products that will be present at a licensed facility.
	Modify Strain Edit Name Edit/Add External ID Delete strain	Menu: Data Entry/Strains Option: Modify (pencil)	strain (get) strain (update)	

Business Process	Sub Processes	UI Component	Related API Calls	Description
Manage Inventory Items	Add Inventory Item Name Inventory Item Assign Type of Inventory Item Assign External ID Enter Description Enter Ingredients Enter Storage Instructions Enter Net Weight Enter Contents Enter Serving Size Set "Used Butane" flag Enter UOM Enter Cost of Goods Enter Value Enter Number of Servings Enter Infused Weight	Menu: Data Entry/Inventory Items Option: Add	inventory_type (create)	Inventory items represent the concept of the products that will exist at a facility.
	Edit Inventory Item Edit Inventory Item Name Reassign Type of Inventory Item Reassign External ID Edit Description Edit Ingredients Edit Storage Instructions Edit Net Weight Edit Contents Edit Serving Size Set /Reset "Used Butane" flag Edit UOM Edit Cost of Goods Edit Value Edit Number of Servings Edit Infused Weight Delete Inventory Item	Menu: Data Entry/Inventory Items Option: Modify (pencil)	inventory_type (get) inventory_type (update)	

Business Process	Sub Processes	UI Component	Related API Calls	Description
Propagation	Add Batch(es) Assign External ID Assign Type of Batch Assign Source Assign Propagation Source Set Number of plants in Batch Enter Planted Date Assign Area Assign Plant Stage Assign Strain	Menu: Data Entry/Batches Option: Add	batch (create)	Batch types include plant, harvest, and extraction. For plant propagation, groups of plants of the same strain can be created simultaneously by creating a plant batch.
	Add Batch(es) Edit External ID Edit Type of Batch Edit Source Edit Propagation Source Edit Number of plants in Batch Edit Planted Date Change Area Edit Plant Stage Edit Strain Delete Batch	Menu: Data Entry/Batches Option: Modify (pencil)	batch (get) batch (update) batch (delete)	Plant batches can be modified as a group when they shift stage or location throughout their life cycle.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Propagation (cont.)	Edit External ID Edit Batch ID Edit Plant Stage Modify Area Edit Propagation Source Edit Created Date Edit Est Harvested Date Designate if Mother Plant Designate if Initial Inventory Edit Group Name Edit Additives Edit Pesticides Edit Nutrients Edit Notes	Menu: Data Entry Plants Option: Modify (pencil)	plant (get) plant (update)	Individual plants or groups of plants that are not in the same batch can be modified through the 'plant' record as they shift stage or location throughout their life cycle.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Living Plant Processes	Select included Children Batch(es) Assign External ID Set Type Assign Area Designate Source Set Propagation Source Select Strain Set Plant Stage Enter Planted Date Enter Est Harvest Date	Menu: Data Entry Batches Option: Modify (pencil)	batch (get) batch (update)	Plant batches can be modified as a group when they shift stage or location throughout their life cycle.
	Edit External ID Edit Batch ID Edit Plant Stage Modify Area Edit Propagation Source Edit Created Date Edit Est Harvested Date Designate if Mother Plant Designate if Initial Inventory Edit Group Name Edit Additives Edit Pesticides Edit Nutrients Edit Notes	Menu: Data Entry Plants Option: check box + Modify icon (pencil)	plant (get) plant (update)	Individual plants or groups of plants that are not in the same batch can be modified through the 'plant' record as they shift stage or location throughout their life cycle.
	Identify Source Select Plant Set Disposal Date Select Inventory Type Select Phase Select Reason (for disposal) Enter Method Info Enter External ID Attach Disposal Certificate	Menu: Data Entry Plants Option: select box + Dispose icon (wrench/screwdriver)	disposal (create)	Disposal of plants during their life cycle are documented by creating a disposal record with the appropriate reason code.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Harvest Process	Assign Area Enter Original Wet Weight Enter Flower Dry Weight Enter Other Material Dry Weight Set UOM Select Harvest Batch (to add to) Enter Waste Amt. Select Included plant(s)	Menu: Data Entry Batches Option: Harvest icon (tree)	harvest_batch (create)	To harvest a group of plants of the same strain and record the wet weight of the batch, create a harvest batch.
Post-Harvest Processes	Enter Cured Batch Weight	Menu: Data Entry Batches Option: Cure Icon (circle)	batch (get) batch (update)	The cure weight of the harvest batch represents the total dried weight of the combined flower and trim.
	Enter Additives Enter Final Cure Weight Create Flower/Other Material Lots	Menu: Data Entry Batches Option: Finish Icon (Checkmark)	batch (get) batch (update) inventory (create)	Inventory lots are created from harvest batches by designating the amount of final cure weight being packaged.
	Enter waste amount	Menu: Data Entry Batches Option: Waste Icon (Garbage Can)	batch (get) batch (update)	Waste can be entered throughout the course of the post-harvest processes and is associated with the harvest batch that it was generated from.
	Delete a Batch	Menu: Data Entry Batches Option: Delete (X symbol)	batch (delete)	Batches entered in error may be deleted from the system.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Disposal	Select Source (Batch/Plant/Inventory) Select respective Global id for the Batch/Plant/Inventory Set Disposal Date Set Inventory Type Set Plant Phase Set Reason for Disposal Describe Method of Disposal Set External ID Attach Disposal Certificate	Menu: Data Entry Disposals Option: Add	disposal (create)	Disposal records can be created for plants, batches, and inventory lots.
	Edit Source (Batch/Plant/Inventory) Edit respective Global id for the Batch/Plant/Inventory Edit Disposal Date Edit Inventory Type Edit Plant Phase Edit Reason for Disposal Edit Method of Disposal Edit External ID Attach different Disposal Certificate	Menu: Data Entry Disposals Option: Modify icon (pencil)	disposal (get) disposal (modify)	Disposal records may be modified to reflect any change to data that has been already entered.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Creation	Set External ID Check as Initial Inventory Check as Medically Compliant Select Batch Id Select Packaged Type Select Inventory Type Designate Area Set Expiration Date Enter Quantity Enter Net Weight (GM) Enter UOM Describe Additives Enter Cost of Goods Sold Enter Value	Menu: Data Entry Lots Option: Add	inventory (create)	Use the 'inventory' data element for physical inventory that exists at the licensed facility. First, create inventory lots from a harvest batch.
	Edit External ID Check as Initial Inventory Check as Medically Compliant Edit Batch Id Edit Packaged Type Edit Inventory Type Designate Area Edit Expiration Date Edit Quantity Edit Net Weight (GM) Enter UOM Edit Additives Edit Cost of Goods Sold Edit Value	Menu: Data Entry Lots Option: Modify icon (pencil)	inventory (get) inventory (update)	Inventory lot attributes (other than the quantity) can be modified through the 'inventory' record.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Management	Delete Lot	Menu: Data Entry Lots Option: Delete (X symbol)	inventory (delete)	Inventory lot records created in error may be deleted.
	Set External ID Select Lot ID Set Quantity Describe Reason for Adjustment Select User making Adjustment Enter Adjusted Date Enter Memo info	Menu: Data Entry Inventory Adjustments Option: Add	inventory_adjustment (create)	'Inventory adjustments' are used to modify the quantity of an inventory lot with an assigned 'reason code'.
	Enter QTY moved to new Lot (splitting lots)	Menu: Data Entry/Lots Option: Split Selected Lot	inventory (get) inventory (modify) inventory (create)	Lots can be split by decrementing the original lot where inventory is coming from, then creating a new lot that is associated to the same batch.
	Select input(s) and quantit(ies) Set External ID Select Inventory Type Indicate if Medically compliant Set Area Select UOM Enter Qty Enter Waste amount Enter Start Date Enter End Date Enter Expiration Date Describe Additives Product Not Altered Attestation	Menu: Data Entry Inventory Conversion	inventory (get) inventory (modify) inventory (create)	This occurs when a grower converts bulk flower into pre-packaged flower. The input inventory should be decremented, then the output inventory must be created.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Transfers	Set External ID Select Destination Licensee Select Destination User Select Driver Enter Est. Departure Enter Est. Arrival Date Enter Transferred Date Enter Stops Enter Vehicle Description Enter Vehicle License Plate Attach Image of Manifest Enter Route Designate Type of Transfer (Plant/Inventory) Add Lot(s) to Manifest including: Lot Number QTY Designate if Sample Designate if Non-mandatory Sample	Menu: Data Entry Inventory Transfers Option: Add Inventory Transfers	inventory_transfer (create)	'Inventory transfers' that are being created are saved with an 'open' status pending transfer.

Business Process	Sub Processes	UI Component	Related API Calls	Description
	Enter Driver Set Est Departure Datetime Set Est Arrival Datetime Enter Transferred Date Describe Stops Enter Vehicle Description Enter License Plate Enter Route Enter Notes	Menu: Data Entry Inventory Transfers Option: Transporter Icon (pencil) (Changing a Transfer status to 'In Transit')	inventory_transfer_in_transit (create)	If the Transporter information is not provided at the time the inventory transfer is created, It will be saved in a partial "ready for pickup" state. It can be edited later (by either the sending or receiving licensee) to include this information at which point a notification email will be sent. Once a transfer is leaving the sending facility, it can be designated as 'in transit' with this call.
	Enter Received QTY Designate Area Confirm Strain	Menu: Reports/Inventory Transfers/Receive Option: Receiving Icon (gear)	receive_transfer (create)	To receive an inventory transfer from another licensee, use the 'receive_transfer' call to confirm the precise quantity of each item being received.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Sales	Set External ID Select Area Select Status Select Type of Sale Set Sold Date Select lot(s) Enter Qty Enter Discount Enter Tax	Menu: Data Entry/Sales Option: Add	sale (create)	Sale records for wholesale transactions may be recorded as a sale of type "wholesale".
	Edit External ID Edit Area Edit Status Edit Type of Sale Edit Sold Date Edit lot(s) Edit Qty Edit Discount Edit Tax	Menu: Data Entry/Sales Option: Modify Icon (pencil)	sale (modify)-coming soon!	Sale records may be modified once they have been created. A voided sale should be modified to a sale type of "void".

Processor Facility Workflow Steps and Related API Calls

Business Process	Sub Processes	UI Component	Related API Calls	Description
Manage Users	Set Up Users Modify Users Inactivate Users Change Status/Privileges Set/Reset MFA	Menu: Users Option: Add	user (get) user (create) user (update)	User profiles give authorized individuals access to licensee facility data.
Manage Areas	Add area Assign Global ID Name Area Assign External ID Assign Area Type	Menu: Data Entry/Areas Option: Add	area (create)	Areas represent physical locations at licensed facilities where plants and inventory will be located.
	Modify area Edit Name Edit/Add External ID Reassign Area Type Delete Area	Menu: Data Entry/Areas Option: Modify (pencil)	area (get) area (update)	
Manage Strains	Add Strain Assign Global ID Name Strain Assign External ID	Menu: Data Entry/Strains Option: Add	strain (create)	Strains must be created for all strains of plants or strain-specific products that will be present at a licensed facility.
	Modify Strain Edit Name Edit/Add External ID Delete strain	Menu: Data Entry/Strains Option: Modify (pencil)	strain (get) strain (update)	

Business Process	Sub Processes	UI Component	Related API Calls	Description
Manage Inventory Items	Add Inventory Item Name Inventory Item Assign Type of Inventory Item Assign External ID Enter Description Enter Ingredients Enter Storage Instructions Enter Net Weight Enter Contents Enter Serving Size Set "Used Butane" flag Enter UOM Enter Cost of Goods Enter Value Enter Number of Servings Enter Infused Weight	Menu: Data Entry/Inventory Items Option: Add	inventory_type (create)	Inventory items represent the concept of the products that will exist at a facility.
	Edit Inventory Item Edit Inventory Item Name Reassign Type of Inventory Item Reassign External ID Edit Description Edit Ingredients Edit Storage Instructions Edit Net Weight Edit Contents Edit Serving Size Set /Reset "Used Butane" flag Edit UOM Edit Cost of Goods Edit Value Edit Number of Servings Edit Infused Weight Delete Inventory Item	Menu: Data Entry/Inventory Items Option: Modify (pencil)	inventory_type (get) inventory_type (update)	

Business Process	Sub Processes	UI Component	Related API Calls	Description
Disposal	Select Source (Batch/Plant/Inventory) Select respective Global id for the Batch/Plant/Inventory Set Disposal Date Set Inventory Type Set Plant Phase Set Reason for Disposal Describe Method of Disposal Set External ID Attach Disposal Certificate	Menu: Data Entry Disposals Option: Add	disposal (create)	Disposal records can be created for plants, batches, and inventory lots.
	Edit Source (Batch/Plant/Inventory) Edit respective Global id for the Batch/Plant/Inventory Edit Disposal Date Set Inventory Type Edit Plant Phase Edit Reason for Disposal Modify Method of Disposal Edit External ID Attach different Disposal Certificate	Menu: Data Entry Disposals Option: Modify icon (pencil)	disposal (get) disposal (modify)	Disposal records may be modified to reflect any change to data that has been already entered.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Creation	Set External ID Check as Initial Inventory Check as Medically Compliant Select Batch Id Select Packaged Type Select Inventory Type Designate Area Set Expiration Date Enter Quantity Enter Net Weight (GM) Enter UOM Describe Additives Enter Cost of Goods Sold Enter Value	Menu: Data Entry Lots Option: Add	inventory (create)	Use the 'inventory' data element for physical inventory that exists at the licensed facility. First, create inventory lots from a harvest batch.
	Edit External ID Check as Initial Inventory Check as Medically Compliant Edit Batch Id Edit Packaged Type Edit Inventory Type Modify Area Edit Expiration Date Edit Quantity Edit Net Weight (GM) Edit UOM Edit Additives Edit Cost of Goods Sold Edit Value	Menu: Data Entry Lots Option: Modify icon (pencil)	inventory (get) inventory (update)	Inventory lot attributes (other than the quantity) can be modified through the 'inventory' record.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Management	Delete Lot	Menu: Data Entry/Lots Option: Delete (X symbol)	inventory (delete)	Inventory lots can be deleted if they were created in error.
	Set External ID Select Lot ID Set Quantity Describe Reason for Adjustment Select User making Adjustment Enter Adjusted Date Enter Memo info	Menu: Data Entry /Inventory Adjustments Option: Add	inventory_adjustment (create)	'Inventory adjustments' are used to modify the quantity of an inventory lot with an assigned 'reason code'.
	Enter QTY moved to new Lot	Menu: Data Entry/Lots Option: Split Selected Lot	inventory (get) inventory (modify) inventory (create)	Lots can be split by decrementing the original lot where inventory is coming from, then creating a new lot that is associated to the same batch.
	Select input(s) and quantit(ies) Set External ID Select Inventory Type Indicate if Medically compliant Set Area Select UOM Enter Qty Enter Waste amount Enter Start Date Enter End Date Enter Expiration Date Describe Additives Product Not Altered Attestation	Menu: Data Entry Inventory Conversion	inventory (get) inventory (modify) inventory (create)	This occurs when a processor converts bulk flower into intermediate products.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Production Run	Select Children Batch(es) Set External ID Select Type Select Area Select Source Select Propagation Source Enter Packaged Date Enter Expiration Date	Menu: Production Run Option: Add	batch (create)	Production runs are a batch that consists of multiple harvest batches being combined.
	Select Children Batch(es) Set External ID Select Type Select Area Select Source Select Propagation Source Enter Packaged Date Enter Expiration Date	Menu: Production Run Option: Modify Icon (pencil)	batch (get) batch (modify)	Production runs may be modified to reflect changes in their area or status.
	Delete Production Run	Menu: Production Run Option: Delete Icon (X)	batch (delete)	Production run records may be deleted if they are entered in error.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Transfers	Set External ID Select Destination Licensee Select Destination User Select Transporter (driver) Enter Est. Departure Enter Est. Arrival Date Enter Transferred Date Enter Stops Enter Vehicle Description Enter Vehicle License Plate Attach Image of Manifest Enter Route Designate Type of Transfer (Plant/Inventory) Add Lot(s) to Manifest including: Lot Number QTY Designate if Sample Designate if Non-mandatory Sample	Menu: Data Entry Inventory Transfers Option: Add Inventory Transfers	inventory_transfer (create)	'Inventory transfers' that are being created are saved with an 'open' status pending transfer.
	Enter Transporter (driver) Set Est Departure Datetime Set Est Arrival Datetime Enter Transferred Date Describe Stops Enter Vehicle Description Enter License Plate Enter Route Enter Notes	Menu: Data Entry Inventory Transfers Option: Transporter Icon (pencil) (Changing a Transfer status to 'In Transit')	inventory_transfer_in_transit (create)	If the Transporter information is not provided at the time the inventory transfer is created, It will be saved in a partial "ready for pickup" state. It can be edited later to include this information at which point a notification email will be sent. Once a transfer is leaving the sending facility, it can be designated as 'in transit' with this call.

	Enter Received QTY Designate Area Confirm Strain	Menu: Reports/Inventory Transfers/Receive Option: Receiving Icon (gear)	receive_transfer	To receive an inventory transfer from another licensee, use the 'receive_transfer' call to confirm the precise quantity of each item being received.

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Business Process	Sub Processes	UI Component	Related API Calls	Description
Sales	Set External ID Select Area Select Status Select Type of Sale Set Sold Date Select lot(s) Enter Qty Enter Discount Enter Tax	Menu: Data Entry/Sales Option: Add	sale (create)	Sale records for wholesale transactions may be recorded as a sale of type "wholesale".
	Edit External ID Edit Area Edit Status Edit Type of Sale Edit Sold Date Edit lot(s) Edit Qty Edit Discount Edit Tax	Menu: Data Entry/Sales Option: Modify Icon (pencil)	sale (get) sale (modify)—coming soon!	Sale records may be modified once they have been created. A voided sale should be modified to a sale type of "void".

Retail Facility Workflow Steps and Related API Calls

Business Process	Sub Processes	UI Component	Related API Calls	Description
Manage Users	Set Up Users Modify Users Inactivate Users Change Status/Privileges Set/Reset MFA	Menu: Users Option: Add	user (get) user (create) user (update)	User profiles give authorized individuals access to licensee facility data.
Manage Areas	Add area Assign Global ID Name Area Assign External ID Assign Area Type	Menu: Data Entry/Areas Option: Add	area (create)	Areas represent physical locations at licensed facilities where plants and inventory will be located.
	Modify area Edit Name Edit/Add External ID Reassign Area Type Delete Area	Menu: Data Entry/Areas Option: Modify (pencil)	area (get) area (update)	
Manage Strains	Add Strain Assign Global ID Name Strain Assign External ID	Menu: Data Entry/Strains Option: Add	strain (create)	Strains must be created for all strains of plants or strain-specific products that will be present at a licensed facility.
	Modify Strain Edit Name Edit/Add External ID Delete strain	Menu: Data Entry/Strains Option: Modify (pencil)	strain (get) strain (update)	

Business Process	Sub Processes	UI Component	Related API Calls	Description
Manage Inventory Items	Add Inventory Item Name Inventory Item Assign Type of Inventory Item Assign External ID Enter Description Enter Ingredients Enter Storage Instructions Enter Net Weight Enter Contents Enter Serving Size Set "Used Butane" flag Enter UOM Enter Cost of Goods Enter Value Enter Number of Servings Enter Infused Weight	Menu: Data Entry/Inventory Items Option: Add	inventory_type (create)	Inventory items represent the concept of the products that will exist at a facility.
	Edit Inventory Item Edit Inventory Item Name Reassign Type of Inventory Item Reassign External ID Edit Description Edit Ingredients Edit Storage Instructions Edit Net Weight Edit Contents Edit Serving Size Set /Reset "Used Butane" flag Edit UOM Edit Cost of Goods Edit Value Edit Number of Servings Edit Infused Weight Delete Inventory Item	Menu: Data Entry/Inventory Items Option: Modify (pencil)	inventory_type (get) inventory_type (update)	

Business Process	Sub Processes	UI Component	Related API Calls	Description
Disposal	Select Source (Batch/Plant/Inventory) Select respective Global id for the Batch/Plant/Inventory Set Disposal Date Set Inventory Type Set Plant Phase Set Reason for Disposal Describe Method of Disposal Set External ID Attach Disposal Certificate	Menu: Data Entry/Disposals Option: Add	disposal (create)	Disposal records can be created for plants, batches, and inventory lots.
	Edit Source (Batch/Plant/Inventory) Edit respective Global id for the Batch/Plant/Inventory Edit Disposal Date Edit Inventory Type Edit Plant Phase Edit Reason for Disposal Edit Method of Disposal Edit External ID Attach different Disposal Certificate	Menu: Data Entry/Disposals Option: Modify icon (pencil)	disposal (get) disposal (modify)	Disposal records may be modified to reflect any change to data that has been already entered.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Creation	Set External ID Check as Initial Inventory Check as Medically Compliant Select Batch Id Select Packaged Type Select Inventory Type Designate Area Set Expiration Date Enter Quantity Enter Net Weight (GM) Enter UOM Describe Additives Enter Cost of Goods Sold Enter Value	Menu: Data Entry Lots Option: Add	inventory (create)	Use the 'inventory' data element for physical inventory that exists at the licensed facility. First, create inventory lots from a harvest batch.
	Edit External ID Check as Initial Inventory Check as Medically Compliant Edit Batch Id Edit Packaged Type Edit Inventory Type Modify Area Edit Expiration Date Edit Quantity Edit Net Weight (GM) Edit UOM Edit Additives Edit Cost of Goods Sold Edit Value	Menu: Data Entry Lots Option: Modify icon (pencil)	inventory (get) inventory (update)	Inventory lot attributes (other than the quantity) can be modified through the 'inventory' record.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Management	Delete Lot	Menu: Data Entry Lots Option: Delete (X symbol)	inventory (delete)	Inventory lots may be deleted if they are entered in error.
	Set External ID Select Lot ID Set Quantity Describe Reason for Adjustment Select User making Adjustment Enter Adjusted Date Enter Memo info	Menu: Data Entry Inventory Adjustments Option: Add	inventory_adjustment (create)	'Inventory adjustments' are used to modify the quantity of an inventory lot with an assigned 'reason code'.
	Enter QTY moved to new Lot	Menu: Data Entry/Lots Option: Split Selected Lot	inventory (get) inventory (modify) inventory (create)	Lots can be split by decrementing the original lot where inventory is coming from, then creating a new lot that is associated to the same batch.
	Select input(s) and quantit(ies) Set External ID Select Inventory Type Indicate if Medically compliant Set Area Select UOM Enter Qty Enter Waste amount Enter Start Date Enter End Date Enter Expiration Date Describe Additives Product Not Altered Attestation	Menu: Data Entry Inventory Conversion	inventory (get) inventory (modify) inventory (create)	This occurs when a dispensary converts bulk flower into pre-packaged flower.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Transfers	Set External ID Select Destination Licensee Select Destination User Select Transporter (driver) Enter Est. Departure Enter Est. Arrival Date Enter Transferred Date Enter Stops Enter Vehicle Description Enter Vehicle License Plate Attach Image of Manifest Enter Route Designate Type of Transfer (Plant/Inventory) Add Lot(s) to Manifest including: Lot Number QTY Designate if Sample Designate if Non-mandatory Sample	Menu: Data Entry Inventory Transfers Option: Add Inventory Transfers	inventory_transfer (create)	'Inventory transfers' that are being created are saved with an 'open' status pending transfer.
	Enter Transporter (driver) Set Est Departure Datetime Set Est Arrival Datetime Enter Transferred Date Describe Stops Enter Vehicle Description Enter License Plate Enter Route Enter Notes	Menu: Data Entry Inventory Transfers Option: Transporter Icon (pencil) (Changing a Transfer status to 'In Transit')	inventory_transfer_in_transit (create)	If the Transporter information is not provided at the time the inventory transfer is created, It will be saved in a partial "ready for pickup" state. It can be edited later to include this information at which point a notification email will be sent. Once a transfer is leaving the sending facility, it can be designated as 'in transit' with this call.

	Enter Received QTY Designate Area Confirm Strain	Menu: Reports/Inventory Transfers/Receive Option: Receiving Icon (gear)	receive_transfer	To receive an inventory transfer from another licensee, use the 'receive_transfer' call to confirm the precise quantity of each item being received.
	Enter Transporter (driver) Set Est Departure Datetime Set Est Arrival Datetime Enter Transferred Date Describe Stops Enter Vehicle Description Enter License Plate Enter Route Enter Notes	Menu: Data Entry Inventory Transfers Option: Transporter Icon (pencil) (Changing a Transfer status to 'In Transit')	inventory_transfer_in_transit (create)	If the Transporter information is not provided at the time the inventory transfer is created, it will be saved in a partial "ready for pickup" state. It can be edited later to include this information at which point a notification email will be sent. Once a transfer is leaving the sending facility, it can be designated as 'in transit' with this call.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Sales	Set External ID Select Area Select Status Select Type of Sale Set Sold Date Select lot(s) Enter Qty Enter Discount Enter Tax	Menu: Data Entry/Sales Option: Add	sale (add)	Sales to customers are logged by creating a sale record. This record can be designated as a type of "retail_medical" or "retail_recreational"
	Edit External ID Edit Area Edit Status Edit Type of Sale Edit Sold Date Edit lot(s) Edit Qty Edit Discount Edit Tax	Menu: Data Entry/Sales Option: Modify Icon (pencil)	sale (get) sale (modify)—coming soon!	Sale records may be modified to correct details of the transaction. A sale that should be deleted would be assigned a transaction type of "void".

Laboratory Workflow Steps and Related API Calls

Business Process	Sub Processes	UI Component	Related API Calls	Description
Manage Users	Set Up Users Modify Users Inactivate Users Change Status/Privileges Set/Reset MFA	Menu: Users Option: Add	user (get) user (create) user (update)	User profiles give authorized individuals access to licensee facility data.
Manage Areas	Add area Assign Global ID Name Area Assign External ID Assign Area Type	Menu: Data Entry/Areas Option: Add	area (create)	Areas represent physical locations at licensed facilities where plants and inventory will be located.
	Modify area Edit Name Edit/Add External ID Reassign Area Type Delete Area	Menu: Data Entry/Areas Option: Modify (pencil)	area (get) area (update)	
Manage Strains	Add Strain Assign Global ID Name Strain Assign External ID	Menu: Data Entry/Strains Option: Add	strain (create)	Strains must be created for all strains of plants or strain-specific products that will be present at a licensed facility.
	Modify Strain Edit Name Edit/Add External ID Delete strain	Menu: Data Entry/Strains Option: Modify (pencil)	strain (get) strain (update)	

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Creation	Set External ID Check as Initial Inventory Check as Medically Compliant Select Batch Id Select Packaged Type Select Inventory Type Designate Area Set Expiration Date Enter Quantity Enter Net Weight (GM) Enter UOM Describe Additives Enter Cost of Goods Sold Enter Value	Menu: Data Entry Lots Option: Add	inventory (create)	Use the 'inventory' data element for physical inventory that exists at the licensed facility. First, create inventory lots from a harvest batch.
	Edit External ID Check as Initial Inventory Check as Medically Compliant Edit Batch Id Edit Packaged Type Edit Inventory Type Designate Area Edit Expiration Date Edit Quantity E Edit Net Weight (GM) Enter UOM Edit Additives Edit Cost of Goods Sold Edit Value	Menu: Data Entry Lots Option: Modify icon (pencil)	inventory (get) inventory (update)	Inventory lot attributes (other than the quantity) can be modified through the 'inventory' record.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Management	Delete Lot	Menu: Data Entry Lots Option: Delete (X symbol)	inventory (delete)	Inventory lots may be deleted if they are entered in error.
	Set External ID Select Lot ID Set Quantity Describe Reason for Adjustment Select User making Adjustment Enter Adjusted Date Enter Memo info	Menu: Data Entry Inventory Adjustments Option: Add	inventory_adjustment (create)	'Inventory adjustments' are used to modify the quantity of an inventory lot with an assigned 'reason code'.
	Enter QTY moved to new Lot	Menu: Data Entry/Lots Option: Split Selected Lot	inventory (get) inventory (modify) inventory (create)	Lots can be split by decrementing the original lot where inventory is coming from, then creating a new lot that is associated to the same batch.
	Select input(s) and quantit(ies) Set External ID Select Inventory Type Indicate if Medically compliant Set Area Select UOM Enter Qty Enter Waste amount Enter Start Date Enter End Date Enter Expiration Date Describe Additives Product Not Altered Attestation	Menu: Data Entry Inventory Conversion	inventory (get) inventory (modify) inventory (create)	This occurs when a retailer converts bulk flower into pre-packaged flower.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Disposal	Select Source (Batch/Plant/Inventory) Select respective Global id for the Batch/Plant/Inventory Set Disposal Date Set Inventory Type Set Plant Phase Set Reason for Disposal Describe Method of Disposal Set External ID Attach Disposal Certificate	Menu: Data Entry Disposals Option: Add	disposal (create)	Disposal records can be created for plants, batches, and inventory lots.
	Edit Source (Batch/Plant/Inventory) Edit respective Global id for the Batch/Plant/Inventory Edit Disposal Date Edit Inventory Type Edit Plant Phase Edit Reason for Disposal Edit Method of Disposal Edit External ID Attach different Disposal Certificate	Menu: Data Entry Disposals Option: Modify icon (pencil)	disposal (get) disposal (modify)	Disposal records may be modified to reflect any change to data that has been already entered.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Laboratory Results	Select Inventory Type of Sample Select Lab Technician Enter Tested Date Enter External ID Attach Lab Results PDF Set Foreign Matter Passed/Failed Set Testing Status Enter Moisture Content Percent Enter Herbicides PPM Enter Growth Regulators PPM Enter THC % Enter Notes	Menu: Data Entry/Lots Option: Lab Results Icon (beaker)	lab_result (create) lab_result (modify)	Lab result records can be generated using this call. Lab results can be documented all at once, or by section using the “modify” call.
Laboratory Results Cont. (Pesticides)	Enter Pesticide Testing Status Enter ABAMECTIN PPM Enter ACEQUINOCYL PPM Enter BIFENAZATE PPM Enter BIFENTRIN PPM Enter CAPTAN PPM Enter CYFLUTHRIN PPM Enter DIMETHOMORPH PPM Enter ETOXAZOLE PPM Enter FENHEXAMID PPM Enter FLONICAMID PPM Enter FLUDIOXONIL PPM Enter IMIDACLOPRID PPM Enter MYCLOBUTANIL PPM Enter PCNB PPM Enter PIPERONYL BUTOXIDE PPM Enter PYRETHRIN PPM Enter SPINETORAM PPM Enter SPINOSAD PPM Enter SPIROTETRAMET PPM Enter THIAMETHOXAM PPM Enter TRIFLOXYSTROBIN PPM		lab_result (create)	Lab result records can be generated using this call. Lab results can be documented all at once, or by section using the “modify” call.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Laboratory Results Cont. (Cannabinoids)	Enter Cannabinoid Testing Status Enter D9 THCA results Enter D9 THC results Enter CBD results Enter CBDA results Enter CBN results Enter D8 THC results Enter THCV results Enter CBDV results Enter CBG results Enter CBGA results Enter CBC results		lab_result (create)	Lab result records can be generated using this call. Lab results can be documented all at once, or by section using the “modify” call.
Laboratory Results Cont. (Microbial)	Enter Microbial Testing Status Enter Total Viable Plate Count Enter Total Yeast Mold results Enter Total Coliform results Enter Bile Tolerant results Enter Pathogenic E Coli results Enter Salmonella results		lab_result (create)	Lab result records can be generated using this call. Lab results can be documented all at once, or by section using the “modify” call.
Laboratory Results Cont. (Mycotoxins)	Enter Mycotoxin Testing Status Enter AFLATOXINS PPB Enter OCHRATOXIN PPB		lab_result (create)	Lab result records can be generated using this call. Lab results can be documented all at once, or by section using the “modify” call.
Laboratory Results Cont. (Heavy Metals)	Enter Heavy Metal Testing Status Enter ARSENIC PPM Enter CADMIUM PPB Enter LEAD PPB Enter MERCURY PPB		lab_result (create)	Lab result records can be generated using this call. Lab results can be documented all at once, or by section using the “modify” call.

Business Process	Sub Processes	UI Component	Related API Calls	Description
Inventory Transfers	Set External ID Select Destination Licensee Select Destination User Select Transporter--driver Enter Est. Departure Enter Est. Arrival Date Enter Transferred Date Enter Stops Enter Vehicle Description Enter Vehicle License Plate Attach Image of Manifest Enter Route Designate Type of Transfer (Plant/Inventory) Add Lot(s) to Manifest including: Lot Number QTY Designate if Sample Designate if Non-mandatory Sample	Menu: Data Entry /Inventory Transfers Option: Add Inventory Transfers	inventory_transfer (create)	'Inventory transfers' that are being created are saved with an 'open' status pending transfer.
	Enter Transporter (driver) Set Est Departure Datetime Set Est Arrival Datetime Enter Transferred Date Describe Stops Enter Vehicle Description Enter License Plate Enter Route Enter Notes	Menu: Data Entry Inventory Transfers Option: Transporter Icon (pencil) (Changing a Transfer status to 'In Transit')	inventory_transfer_in_transit (create)	If the Transporter information is not provided at the time the inventory transfer is created, It will be saved in a partial "ready for pickup" state. It can be edited later to include this information at which point a notification email will be sent. Once a transfer is leaving the sending facility, it can be designated as 'in transit' with this call.

	<p>Enter Received QTY Designate Area Confirm Strain</p>	<p>Menu: Reports/Inventory Transfers/Receive Option: Receiving Icon (gear)</p>	<p>receive_transfer</p>	<p>To receive an inventory transfer from another licensee, use the 'receive_transfer' call to confirm the precise quantity of each item being received.</p>
	<p>Enter Transporter (driver) Set Est Departure Datetime Set Est Arrival Datetime Enter Transferred Date Describe Stops Enter Vehicle Description Enter License Plate Enter Route Enter Notes</p>	<p>Menu: Data Entry Inventory Transfers Option: Transporter Icon (pencil) (Changing a Transfer status to 'In Transit')</p>	<p>inventory_transfer_in_transit (create)</p>	<p>If the Transporter information is not provided at the time the inventory transfer is created, It will be saved in a partial "ready for pickup" state. It can be edited later to include this information at which point a notification email will be sent. Once a transfer is leaving the sending facility, it can be designated as 'in transit' with this call.</p>