

Initial Inventory Upload (Post-Contingency Process)

All licensees are expected to either manually create or upload records into Leaf Data Systems that represent their current on-hand inventory lots.

Prior to uploading (or creating via UI) the initial inventory records, certain administrative data must be created so that the system is able to accept all of the customizable attributes that will be assigned to (plant and) inventory lot records. Following are the templates necessary for the upload of administrative data, as well as batch and inventory lot records. ***NOTE: If you retrieve the csv templates from the "API Test" page, not all of the generated columns are necessary for WA data uploads. Columns not included in the 'Field Descriptions' below are NOT APPLICABLE in Washington. Please, leave these fields blank. Required fields are denoted with an asterisk (*).***

Use the templates provided to create the csv files for data upload. The appropriate fields have been highlighted to guide you in completion of this information. Be sure to save the spreadsheet as a "csv-type" file before attempting to upload the data.

A landing page for Initial Inventory uploads has been created to aid with the traceability post-contingency processes. To upload the csv files created, navigate to 'Data Entry→Import Manager'. Click the 'add' button relative to the record you are trying to upload, and then select the csv file you have saved.

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CSV Templates

Areas

Areas represent physical locations at licensed facilities where plants and inventory will be located. The types of areas are 'quarantine' or 'non-quarantine'. Areas with a 'quarantine' designation are for circumstances such as waste/destruction hold periods, QA quarantine periods, or transfer hold periods.

Areas: Template

	A	B	C	D	E	F	G	H
1	name	type						
2								
3								
4								
5								
6								
7								

Areas: Field Descriptions

NAME	TYPE	DESCRIPTION
*Column A: 'name'	free-form text	The name of the area
*Column B: 'type'	enumerated value	The type of the area (selections include 'quarantine' or 'non-quarantine')

Strains

Strains represent specific sub-species of cannabis and are an attribute that can be designated to batches of inventory. For "intermediate_end_product" type batches, items that are not strain-specific will not require a strain designation.

Strains: Template

	A	B	C	D	E	F	G	H
1	external_id	name						
2								
3								
4								
5								
6								
7								

Strains: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
*Column B: 'name'	free-form text	The name of the strain

Inventory Types

Inventory Types are the different types of product that will be on hand at a facility, not actual physical inventory. Since inventory types represents a virtual bucket for what inventory lots will be in a facility, inventory types should be created before inventory lots. Also, certain "types" allow for a selection of "intermediate_type" in the UI you can see this with the dropdowns for *category* and *sub-category*.

Inventory Types: Template

	A	B	C	D	E	F
1	external_id	name	type	intermediate_type	uom	
2						
3						

Inventory Types: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
*Column B: 'name'	free-form text	The name of the inventory type
*Column C: 'type'	enumerated value	The primary category of the inventory ('end_product' is the only viable selection for a Retailer facility)
*Column D: 'intermediate_type'	enumerated value	The sub-category of the inventory (selections available are based on the primary category entered, and include the following: for 'end_product', associated values are 'liquid_edible', 'solid_edible', 'concentrate_for_inhalation', 'topical', 'infused_mix', 'packaged_marijuana_mix', 'sample_jar', 'usable_marijuana', 'capsules', 'tinctures', 'transdermal_patches', or 'suppository')
*Column E: 'uom'	enumerated value	The unit of measure associated with the inventory type (selections available are 'ea' for inventory that is tracked by its piece count, or 'gm' for inventory that is tracked by its weight in grams. All end products should have a uom of 'ea')

Batches

The only batch type present at a Retailer facility is an intermediate/end product batch.

'Intermediate/end product' batches are batches that consist of multiple harvest batches being combined, for example, combining two different strains to make a blended concentrate product.

Batches: Template

	A	B	C	D	E
1	external_id	type	packaged_completed_at	global_strain_id	global_area_id
2					
3					
4					
5					
6					

Batches: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
*Column B: 'type'	enumerated value	The type of the batch (the only select relevant for a Retailer facility is 'extraction', which is the backend term for an 'intermediate/end product' batch)
Column C: 'packaged_completed_at'	datetime	Enter the date/time the product was packaged
Column D: 'global_strain_id'	global ID	The global ID of the strain associated with the batch (The strain global ID can be found by navigating to 'Data Entry→Strains')
*Column E: 'global_area_id'	global ID	The global ID of the area where the batch is located (The area global ID can be found by navigating to 'Data Entry→Areas')

Inventory

Inventory lots are the physical inventory that exists at a facility.

Inventory lots can be split into smaller lots with the relationship to the parent lot remaining intact and traceable.

Inventory lots that represent inventory types of End Products are related to batches of type "intermediate_end_product" (called 'extraction' on the backend, for upload purposes).

Inventory: Template

	A	B	C	D	E	F	G	H	I	J	K
1	external_id	is_initial_inventory	inventory_created_at	medically_compliant	qty	uom	global_batch_id	global_area_id	global_strain_id	global_inventory_type_id	legacy_id
2											
3											
4											
5											

Inventory: Field Descriptions

NAME	TYPE	DESCRIPTION
Column A: 'external_id'	free-form text	Can be populated with any data (i.e. an abbreviation, secondary naming convention, etc.) as desired by the licensee
Column B: 'is_initial_inventory'	boolean value	Enter '1' if the inventory lot is initial inventory
Column C: 'inventory_created_at'	datetime	Enter the date/time the inventory lot was created
Column D: 'medically_compliant'	boolean value	Enter '1' if the inventory has been designated as being medically compliant, and '0' if it has not
*Column E: 'qty'	integer	Enter the integer piece count of the quantity on hand
Column F: 'uom'	enumerated value	Enter 'ea' for all end products since the inventory structure is a piece count
*Column G: 'global_batch_id'	global ID	The global ID of the batch associated with the inventory (The batch global ID can be found by navigating to 'Data Entry→Batches')
*Column H: 'global_area_id'	global ID	The global ID of the area where the inventory is located (The area global ID can be found by navigating to 'Data Entry→Areas')
*Column I: 'global_strain_id'	global ID	The global ID of the strain associated with the batch (The strain global ID can be found by navigating to 'Data Entry→Strains')

*Column J: 'global_inventory_type_id'	global ID	The global ID of the inventory type associated with the inventory (The inventory global ID can be found by navigating to 'Data Entry → Inventory Types')
*Column K: 'legacy_id'	free-form text	The contingency/old traceability ID associated with the inventory lot, if the lot is designated as initial inventory