

OpenTHC Documentation

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OpenTHC is the only seed to sale solution that provides a fluid system to make your farm, processing facility or testing laboratory maintain full compliance with US DOJ "Guidance Regarding Marijuana Enforcement" (aka: "the Cole memo") and your State regulatory compliance system.

As a web-based application OpenTHC is accessible from any device that can access the internet - computers, tablets, phones. We support a wide range of scanner and printer hardware as well. See <https://openthc.com/hardware>

We offer a 15 day free trial before billing for our subscription based services. Annual and referral discounts are available.

This introduction video for OpenTHC shows the basic processes for

- Dashboard
- Plants
- Creating Clones
- Harvesting
- Curing
- Inventory Lot Creation
- Inventory Conversion
- Manifest Creation
- Label Designer

Please Note: the video is using a Training interface which has limited ability for QA data.

▶ <https://app.openthc.com/pub/training/Introduction.webm> (video)

Introduction

Chapter 1. State Traceability

OpenTHC provides a direct, real-time connection to your State provided inventory tracking system in Alaska, California, Colorado, Hawaii, Nevada, New Mexico, Oregon, Washington - and we continue to expand.

If your region does not have a government system, well, things will be a whole lot easier. Our system works all the same.

Chapter 2. Web Application Overview

OpenTHC is just a plain old Web-Application - this means that things like multiple views, link sharing. Hovering a mouse over buttons or icons will show a tip on what can be accomplished. Additionally, there are help icons we've added next to fields and there are page-specific help videos.

Also, right-clicking (or shift-click) can open details in new tabs or new windows allowing you to view multiple items at a time.

Chapter 3. Authentication

Sign in visiting <https://app.openthc.com/auth/open>. Simply enter your username and password.

Each of your employees can have their own account for both auditing and security purposes.

3.1. Password Reset

If you forgot your password you may reset it, visit <https://app.openthc.com/auth/open> and click the **Reset Password** button. Simply enter the email address you need to reset the password for and follow the prompts.

Chapter 4. Dashboard

4.1. The Main Menu

Navigating the application starts with the Main Menu on the left side, search in the center and a secondary Page Menu available on the right and side. The Gears Menu opens the settings.

[menu zero] | <https://app.openthc.com/manual/menu-zero.png>

The currently highlighted item here is the Dashboard. Each of the Plants, Inventory or Sales items will be highlighted when using those sections of the application. The Search box allows you to find anything in the application and can be accessed quickly with the "hot key" '/.

The second level menu, pae specific appears directly below, on the right and side and changes based on the active section of the application. Section specific controls appear here.

4.2. Dashboard

The Dashboard provides an overview of your entire operation. Indications of how many plants are active, how many are drying, scheduled for harvest or other active states. A breakdown of Strain counts is also displayed.

Chapter 5. Workflow

The Workflow interface provides a task-oriented guide for the system. Many of the standard processes are formed into wizards which are easy to step through.

The Workflow section is split into four sections, **Crops**, **Harvest**, **Process**, **Sales**

In each of these sections, simply choose the button for the process you want to start.

Chapter 6. Product

A **Product** is an item, defined by the business operator as a container for an Inventory Lot. These items represent a common name and package type for a group of materials. Each of these Products is effectively an internal **SKU** for your company.

Each combination of product **name** and **package type** will have it's own product.



The types of products, and those specific product type names, will be defined by your regulatory agency.

6.1. Bulk Products

For Bulk inventory, which includes source materials such as seeds or clones and also raw flower/trim/shake, one creates only a few products. For example, all of these product names are reasonable definitions could be use. Each company will define their own unique products.

- Bulk Wet Flower
- Bulk Dry Flower
- Flower Grade A
- Flower Grade B
- Trim

6.2. Packaged Products

Retail packaged products will include a bit more detail in their definition, to include the packaging details.

- Bagged Bud, 3.5 g
- Loose Trim, 28 g
- Big Bag, 1 oz
- Black Cherry Soda, 12oz
- Rainbow Gummies - Sativa, 10g
- Rainbow Gummies - Sativa, 1 x 1 g

6.2.1. Flavor and Package Type

Each flavor, or product name and package type combination will need it's own Product. For example, four different flavors of packaged hard candy, in three different package types (a 1, 10 and 20 serving) this would create 12 products

- Apple Candy - Single, 1 g
- Apple Candy - 10 pack, 10 * 1g

- Apple Candy - 20 pack, 20 * 1g
- Banana Candy - Single, 1 g
- Banana Candy - 10 pack, 10 * 1g
- Banana Candy - 20 pack, 20 * 1g
- Cherry Candy - Single, 1 g
- Cherry Candy - 10 pack, 10 * 1g
- Cherry Candy - 20 pack, 20 * 1g
- Dragon Fruit Candy - Single, 1 g
- Dragon Fruit Candy - 10 pack, 10 * 1g
- Dragon Fruit Candy - 20 pack, 20 * 1g

Chapter 7. Plants

When managing your grow operation your time will be spent in the Plants section.

[plant icons] | https://gitlab.com/openthc/app/-/wikis/man/image/plant_icons.png

The New link will allow you to create new Plants from your available Inventory of Seeds, Clones, Tissue or Mature Plants. The Drying menu shows a list of all Plants in their drying stage. Harvests provides a list of historical harvest data and Waste is for entering any ad-hoc/daily waste weights.

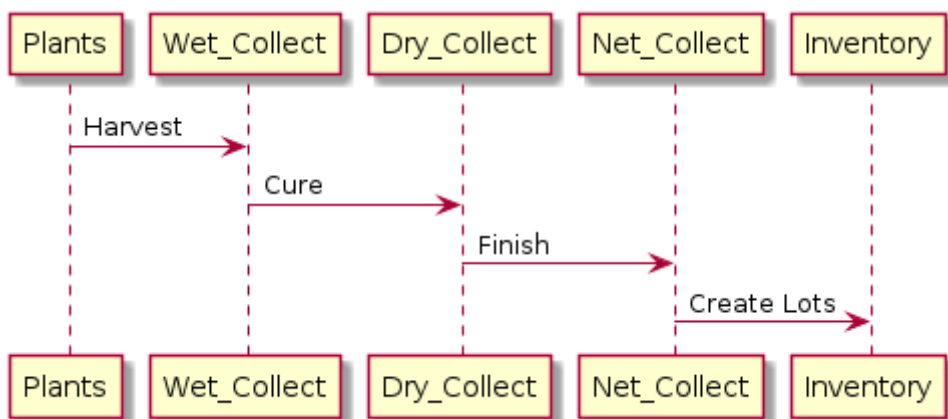
All active trees are shown by default - you can filter and sort. The Venus icon indicates mothers. Plants that are actively growing have green leaves; scheduled for harvest have orange leaves and plants that are drying have brown leaves. The trash bin indicates if this item is scheduled for destruction (blue, with timer), ready for destruction (red) or destroyed and remove (black).

7.1. Growing

During the grow cycle there is not much in terms of track-and-trace that need to be done. When moving the plants from Section to Section you will need to keep that information updated

7.2. Collecting Materials Overview

One or more Plants are selected to collect "Wet" materials of different types. This grouping of plants, a "Harvest Batch", then has "Dry" weights entered. And finally, the *Harvest Batch* is then **Finished** and the Inventory Lots are created.



7.2.1. Collect Wet / Harvesting

Select one or more plants of the **same Strain** and select the Harvest button. When harvesting weights for Wet Flower, Wet Other (aka: Trim) and Wet Waste can be entered. A Wet Flower weight is required. Wet Other and Wet Waste are optional.



These classifications of products are determined by the farmer and are used by the system for determining what is permitted for processing. For example, Other Material cannot be packaged for retail sales.

Weights entered for Wet items can be assigned into Dry items during the Curing stage. Details for Whole Plant or Partial plant harvest and inventory type assignment are detailed below.

The next step will show a list of the selected plants and a form to enter the Wet materials. The Wet Flower is a required field, some data must be entered. Wet Other materials would need to be weighed again and adjusted for a Dry weight. Wet Waste should be quarantined and destroyed.

If you are making multiple collections choose **Save & Reflower** otherwise choose **Save & Complete**.

7.2.2. Collect Wet / Whole Plant Harvest

In this scenario just chop the whole plant down, remove obvious waste and then weigh the entire plant. This is the Wet Flower, enter zero for Wet Other and whatever amount is necessary for Wet Waste. Then choose Save & Complete

7.2.3. Collect Wet / Partial Harvest

When making multiple collections enter Wet Flower and Wet Waste accordingly and use Save & Reflower.



Partial Harvest is not possible with LeafData systems in Pennsylvania or Washington

7.2.4. Collect Wet / Material Type - Harvesting Flower vs Other

The Wet weights entered are treated as a maximum reference for your Dry weights. However, it's acceptable to enter only Wet Flower and then when entering Dry weights enter a small amount of Dry Flower and put the bulk of the weight into Dry Other. Keeping in mind that Other materials must be processed into an Intermediate stage product before becoming Packaged goods.

7.2.5. Collect Dry / Curing

Select one or more plants, that have brown leaf icons next to them, then choose the Cure button. Or you can visit the Drying page from the Plants page and use the filters to select the group of Plants to cure.

[plant collect dry] | <https://app.openthc.com/manual/plant-collect-dry.png>

On the Cure page enter the amount of Dry Flower, Dry Other and Dry Waste. You can also select a room to move these items directly into and automatically schedule this Waste for destruction. The Dry Flower field is required, the other fields are optional.

The resulting Flower and Other Materials become Inventory and must be combined into Lots for further processing.

- Cure & Collect Additional will save these dry weights and allow you to add additional dry weights in the future
- Cure & Complete will save these dry weights and finalize the curing process. No additional

weights will be allowed

- Modify Wet Yield will use the weights entered and process them as updated wet weights.

7.2.6. Collect Dry / Curing for Extraction

If you are curing and want to make Other Material lots for processing into hash, keif or oils. Enter a small amount for Flower and the bulk of the materials would be classified as Other. This would allow you to make large Lots (15lb) for conversion or sale to a processor.

7.3. Plants to Seeds/Clones to Plants

The Regulatory system is a closed loop: Plants create other source materials: Clones and Seeds. Plants that are used for these sources are considered "Mother" plants.

Select one or more Plants from the Plants in Cultivation list and choose the More option then select Clone.

[plant clone] | <https://app.openthc.com/manual/plant-clone.png>

Seeds & Clones to Plants

Selling Plants & Clones To sell plants they must be converted into Inventory as Mature Plant which are then transferred on a Manifest.

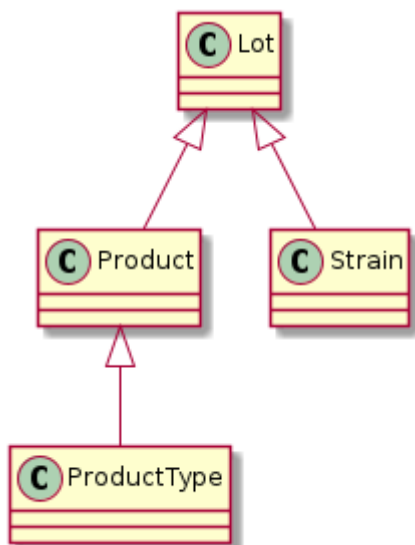
Select one or more Plants, choose Convert which will process them into Inventory. Select those Mature Plant items and then Transfer.

To sell existing Clones, simply select those inventory items and choose Transfer. If you need to make new clones for sale then first select the Plants and choose Clone. This will create the new Clone inventory for you.

If you are selling recently matured Clones as Plants then you may need to take Plants, create Clones then convert the Clones to Plants and finally those Plants to Mature Plants in inventory which can then be sold.

Chapter 8. Inventory

Inventory represents your flower, plant materials, oils, keif and other intermediate materials as well as packaged goods ready for delivery to retailers.



Inventory are all items that are non-farm items. Mature Plants for Sale, Seeds, Clones and Plant Tissue. There are source-stage Flower and Other Material that must be combined to Lots, then intermediate-stage products such as Hash, Keif and Oils and finally packaged-stage products (Usable MJ, Extract for Inhalation) that are ready for distribution to a Retailer.

When viewing the main Inventory screen a selection of filters will be available at the top. Use these to filter and sort the items on the screen.

[lot filter] | <https://app.openthc.com/manual/lot-filter.png>

One or more Inventory items can be selected which provides controls for printing labels, creating lots, sub-lotting, creating samples, adjusting and converting these inventory items.

8.1. Creating Lots

After a Harvest and Cure the system creates Flower and Other Material items that must be combined into Lots for further processing. Lots must be created from identical strains and inventory types, eg: OG Kush/Flower. Select one or more items and choose **Create Lot**. Then you will be able to enter the amounts from each source to use for creating this Lot. Flower Lots have a maximum weight of 5lb and Other Lots have a maximum weight of 15lb.

If you have selected source material that is over the weight limit the **Auto-Allocate** button will appear. Using the feature WeedTraQR will automatically allocate all these source materials into large lots and creating an even distribution on the remainders so we don't end up with very small lots.

This example shows a distribution from five source items into three lots. One is the full size and two and three are a balance from the remaining product.

8.2. Adjusting

Adjusting the quantity of weight based or packaged products can be access using the Adjust button from either the list or item view.

Adjusting the quantity of Intermediate products (Flower Lot, Hash, etc) adjusts the weight on hand, best to use grams. End products have their unit quantity adjusted.

When adjusting a reason must be provided, this is an opportunity to record details about the process and create an audit trail. More information is better. Most likely the Adjustment Type will be either Inventory Audit or Correction - select the best option that describes the reason for the adjustment.

8.2.1. Adjusting Usable

Adjusting Usable is a tricky situation. When Adjusting Usable the system is actually using a weight based changed to adjust the quantity of items on hand. Starting with 10 x 1g packaged items and using Adjust Usable to 0.5g the result will be 20 x 0.5g items.

Additionally, Adjust Usable can only be used to modify weights resulting in whole number quantities, 1 to 0.5 for example. Modifying 0.54 to read 0.25 or correcting 0.63 to 0.50 requires some advanced steps. First locate the multiple of the values to adjust to, adjust the quantity to this value, adjust usable to the correct weight and then adjust quantity back to the original value. For example, adjusting 0.63 usable to 0.50g usable.

1. Adjust Quantity from \$Original_Value to $3150 (63 * 50)$
2. Adjust Usable from 0.63 to 0.50 - Making Quantity 3969
3. Adjust Quantity back to \$Original_Value

8.3. Sub-Lot / Split

From created inventory (Intermediate or Packaged) sub-lotting, or splitting, the inventory is possible. For example cutting a large collection of oil into two (for some reason) or for selecting 20 of your 200 packaged 2g bags; or 10 of 100 vape cartridges. Simply select the Inventory item you want to split and choose **Split**. The form will default to cutting the product in half. Just adjust this to the amount to use for the new Lot and press **Split** again.

8.4. Finish Lot

During processing and packaging steps not all the materials from a Flower Lot are consumed. This remaining weight should be either **Finished** or **Destroyed** depending on the regulations.

Destroying a Lot is a process where the remaining materials are logged as Waste, possibly put into Quarantine and then Confirmed.

Finishing a Lot is a process where the Lot is zeroed out and closed, possibly with a note indicating

where any remaining material went.

Chapter 9. Conversions

9.1. Converting

Select a bunch of Inventory items then choose Convert.

9.1.1. Caviar Joints

Convert the Flower Lot to Mix and send it for QA. Then select this Mix and the Hash or Keif (or other) that you want to combine. Input the correct weights for the Source materials and Output materials and click convert.

Chapter 10. Samples

Chapter 11. Lot Samples

11.1. Samples for Employees

Samples for Employees can be made from Flower Lot, Intermediate or Packaged products.

11.2. Samples for Prospects / Clients

Samples for retailers must be taken from Packaged products such as Usable Marijuana or Extract for Inhalation or Edibles. Once you have these packaged items simply select the Sample button to create a sample for a specific Employee or Vendor.

EG: If you have 100 count of 1g bags, use Sample to take 1 bag to Retailer.

If your products are not fully packaged (eg Flower Lots) then convert a small amount into Usable Marijuana and make samples from that.

EG: If you have 500g of Flower Lot, convert 3g into 3 count 1g bags, then take

Sample from there. It is also possible to create multiple Vendor Samples at one time. Simply select some Packaged type products and press Sample. Then add the Vendors to the list.

image

=== Samples for Vendors / Education This is a similar case to the standard Vendor samples as above. Except in this case the item will be sent in a bulk-lot and the Vendor is responsible for allocating to their respective Employees.

For Retailers as an example: Convert 5g of Flower Lot into 10 x 0.5g packages of Usable Marijuana. Then select the new Usable Marijuana and use Sample to send all these items to the selected Vendor.

Chapter 12. Quality Assurance

WeedTraQR has a tight integration with a Laboratory Data Sharing Portal at <https://lab.openthc.org/> This portal allows you to merge in your State supplied data, with Laboratory supplied data—including COAs. Each QA Result registered with this portal will be linkable, sharable with retailers and other down-stream providers as well as consumers.

- Simple Links for Down-Stream Businesses
- Embedable via QR Code

12.1. Connecting to the QA Portal

- Navigate to **Inventory** ⇒ **QA** ⇒ **Share**
- Click **Connect to QA Portal**

Once you have connected to the portal it will take a few seconds to collect your data from your State agency. Then you will be able to check results, review information, share with clients and get any necessary QR code links.

Chapter 13. Transfer

The Transfer Manifest process provides documentation of products both sent and received by your operation

13.1. Create

Delivering Product / Transfer Manifest Select a bunch of Inventory items; then select the Transfer button.

Delivery Quarantine The Delivery Quarantine period (24h) starts when the manifest is created. It does not matter when the product was created, or moved to your quarantine Section.

Receiving Product Receiving a Manifest can be access from Inventory → Transfer Inbound. A list of pending transfers as well as pending returns will be displayed

13.2. Incoming

13.2.1. Receiving Plants

When plants are received they will be visible on the 'Mature Plants' section of your Inventory. These items must be changed into Plants and issue a new ID to become part of your farm. Select the items, choose Plant and enter the quantity that will be moving onto the farm.

13.2.2. Receiving Product Returns / Voids

Receiving a Manifest from the Manifest section, Inbound. A list of pending transfers as well as pending returns will be displayed. Simply scroll to find the Manifest you are taking returns from and click the Manifest ID. Then enter the updated prices of the goods sold and press Process Returns

13.3. Void

13.3.1. Voiding an Item, a Stop or Entire Manifest

Once a Manifest has been created and before it is Confirmed & Released there is the option to void out individual items, entire stops or the entire manifest. To begin click the 'Void Manifest' button.

On the screen that appears there are red buttons with trash bins in them. There are buttons associated with the item, the stop and at the bottom a button for the entire manifest. Clicking the button will void out the respective item, stop or full manifest.

Be very careful. Voiding a Manifest is not a process that can be undone. A new Manifest would have to be created (see Copy Manifest) and the quarantine period would be reset!

13.4. Outgoing Plants

13.4.1. Selling Plants

Plants that are currently 'Growing on the Farm' (Plants page) must be converted into Inventory. Select the Plants, then choose 'Convert'. Then select these converted Inventory Mature Plants and press Transfer. Fill out the Manifest and move the inventory to a Quarantine Section.

13.5. Returns

Returns / Rejections If the receiving party does not accept the item they must either reject (entering zero amount) the item, or receive and then issue a return manifest. More frequently this process is handled as a rejection. Rejected items are visible on the Manifest page, in the lower section.

Historical inbound manifests are available on the Transfers

Incoming page.

Sales Register For retailers or dispensaries the primary interfaces is the Sales Register. This allows priced inventory items to be scanned or selected, summed, taxed and sold to the consumer or patient.

13.6. Process Flow

Here's a diagram showing the flow of materials from Origin to Target

Chapter 14. Transfer Tricks

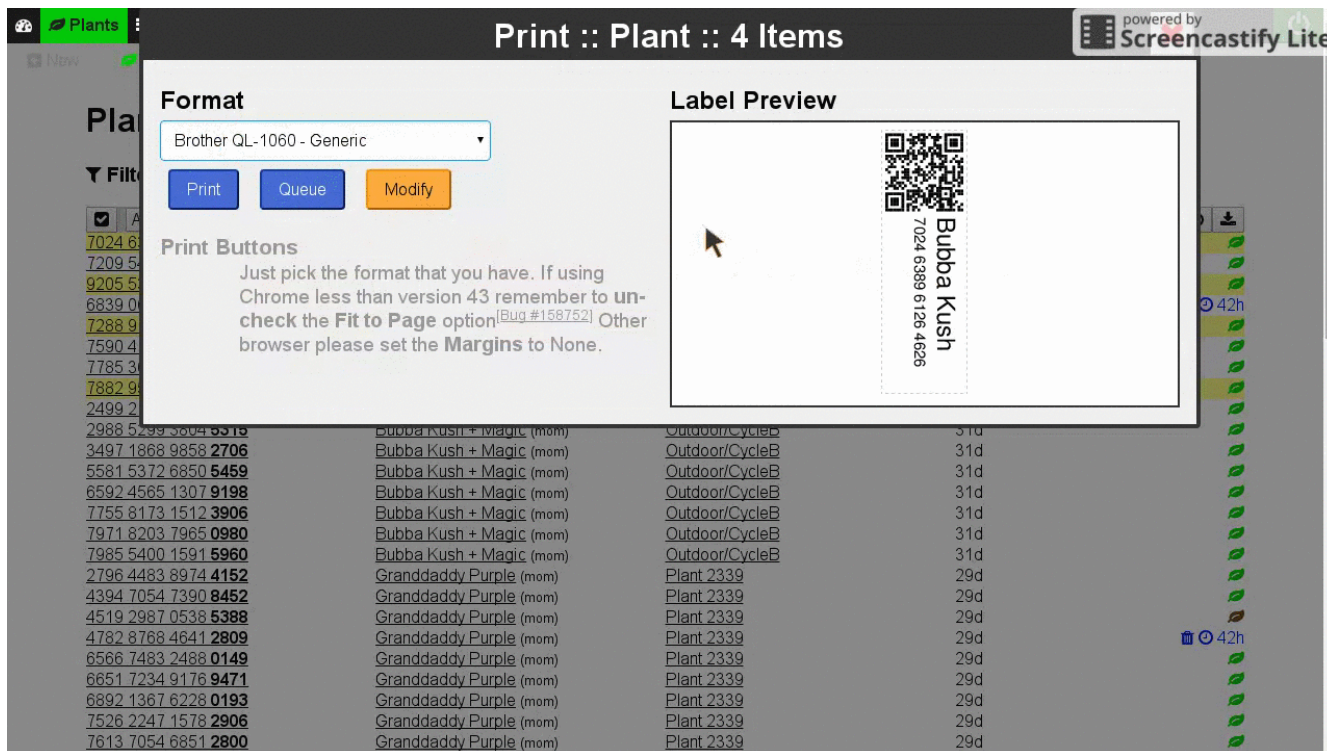
Here is a diagram of the process for reselling original material from Supply License A branded as Supply License B to Retail License C.



Chapter 15. Label Designer

The label designer allows you to create your own label layout. These can be printed on single labels from desktop label printers, sheets of labels from a laser printer or even high-gloss pre-printed packaging labels.

The Label Designer provides a drag-and-drop type layout where you will add data-fields, symbols, fixed-text or macros.



15.1. Data Fields

- QR Code - Just the Item Identifier
- QR App Link - A full hyperlink to the item is embedded in the QR Code
- QR COA Link - A full hyperlink to the item lab results and COA is embedded in the QR Code.

15.2. Text Fields

Text fields allow you to fill in either Fixed-Text or Macro-Text. These fields are single-line only, we do not support automatic word-wrapping[0]

A Fixed-Text field creates a single line of text and always display the same information.

15.3. Text Macros

A Macro-Text field creates a single line of text and you will be prompted for it's information on-print. A Macro is effectively a placeholder.

15.3.1. Word-Wrapping

Word-Wrapping is a fairly complex problem and in many cases when it works as defined it does not work as expected. If a Strain Name or other text began to magically wrap when you didn't expect it and could be different between what is on screen and what is printed.

Chapter 16. Report Engine

The Advanced Reporting Engine allows clients to build their own dashboards of interesting data.

1. Navigate to Reports
2. Choose Advanced Reporting Engine
3. Connect

The advanced reporting engine has a lot of features and can be overwhelming. We offer a one-on-one training session to help you out.

Chapter 17. Advanced

Chapter 18. QuickBooks

WeedTraQR integrates with QuickBooks Online.

Under the Settings

Accounting :: QuickBooks item you will be prompted to **Connect to QuickBooks Online**. Clicking that button will route you through the process with QuickBooks to authorize WeedTraQR.

WeedTraQR does not automatically export all of the data to QuickBooks. This process is done on a per-transfer basis using the Export function.

During the export process you will select/map information from WeedTraQR to QuickBooks. Choose the Client, Export Type (either Invoice or Sales Receipt) and Items, mapping WeedTraQR data to QuickBooks.

Chapter 19. Configuration Settings

19.1. Section

▶ https://app.openthc.com/pub/training/Company_Room.webm (video)

Section Create/Review/Delete

19.2. Vehicle

▶ https://app.openthc.com/pub/training/Company_Vehicle.webm (video)

/Vehicle Edit/Delete

Chapter 20. QuickBooks

The Quickbooks Online Export feature allows user to export Transfer Manifests into Quickbooks.

Incoming Manifests can be exported as either a Invoice, or a Sales Receipt.

Outgoing Manifests can be exported as an Expense.

20.1. Export Incoming Manifest

Incoming Manifests can be exported as Quickbooks Expenses by clicking on the "Export to Quickbooks" button on the Incoming Manifest's page. The user may be asked to sign-in and authorize the OpenTHC app. With an authorized connection to Quickbooks, the user will be given the export workform to fill out.

The Payee is the populated from QuickBooks' *Customers*. QuickBooks Customers can be found on QuickBooks from the Dashboard in Sales > Customers.

The Account must match the Payment Method's type. For instance, only Credit Card accounts may process Credit Card payments. QuickBooks Accounts can be found on QuickBooks from the Dashboard in Accounting > Chart of Accounts.

The Inventory/Service Account refers to the QuickBooks Product, and is intended to link the products in traceability in your accounting software. Inventory/Service Accounts can be found in the QuickBooks from the Dashboard in Sales > Products and Services.

The "Attach Transfer Data Spreadsheet" options will attach the Manifest as a raw CSV object to the QuickBooks Expense document, and will be available for download in QuickBooks.