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Info from Mike Oconnor about needs that they have for tracking their items through sub phases, sub locations, & sub groups.

Adilas Modifications New PO Type & Batch-tracking

Our Industry

In the Cannabis business, we grow the plant(s), harvest and process them – all while keeping track of all the derivative products that come from the plant. Because we produce a consumable product, all consumer items must trace back to the original group of plants.

In our industry, everything revolves around a plant strain. To us, a “Blue Dream” plant has different characteristics of an “Acapulco Gold”. They are rarely (but sometimes) combined.

I describe the process as similar to a lumber company – where trees are grown, harvested and brought to the lumber mill where they are turned into various derivative products – 2x4s, plywood, etc. (even the sawdust is turned into wood pellets and fiber board). In a lumber company, the pinewood is generally not combined with redwood or cedar, but is kept separate because of their unique properties and value.

This is different from a typical manufacturing process where many parts are combined into subassemblies, which are then combined into a finished product – like a car. Our process takes the car and reduces it to special parts and subassemblies – more like a chop shop, where the parts are worth more than the whole.

Software needs:

Adilas’ main record is the PO (purchase order, production order). Items and their inventory quantity go into the PO and are tracked by the PO location. Adilas cleverly separates the plant inventory from the gram inventory with the request vs. received quantity – solving the change in Unit of Measure. You have single vendor POs and mixed vendor POs. You have a Special PO that allows us to adjust inventory. There is a PO that operates outside inventory like a quote.

This system works fine until derivative products (items) start to go in different processing directions. When the plant is broken down into flower, trim, shake and kief – each of these items is final bulk product for other processes. Unfortunately, the PO locks these derivative items to the same location. The only way to avoid this is to create new POs (Rebatch) for each product and transfer the inventory out of the original PO and into new POs.

Linking them with the SubPO in a flexgrid entry does retain traceback to the source PO, but it is cumbersome and totally dependent upon manual intervention to keep it accurate. From a management reporting perspective, it is more than a challenge to reassemble the path of the original plant group. This is now being done piecemeal in Excel.

Proposed solution:

We would like a special PO that allows the user to modify the location for each item. Just this modification would allow an item like Trim, to be in Location:Extract, while the remaining Flower can be in Location:Cure.

If possible, we would like the Invoice (Transfer Invoice or Customer Invoice) to have the same capability of invoicing out items from multiple locations. We can then easily move inventory from multiple locations without having to create a separate invoice for each location. Imagine that we have edibles from the kitchen, concentrates from the extraction room, flower packaged from cure. At the moment, we cannot create a single invoice for all the products being shipped to a dispensary. We must now create an invoice by each location. While location is important for inventory reconciliation, the invoice should not be restricted to moving or selling items by location (nor should the PO).

Other changes to consider:

If you really want to further improve the system for the cannabis industry, we would like the option of creating a PO (let's call it a Master PO), that starts with a plant group, is harvested, turned into bulk derivatives (flower, trim, shake, kief) and then allows these derivatives to be broken down (Internal Builds) in a way that intimately ties the Internal Builds to the MasterPO.

We see this happening in the following way: A breakdown checkbox next to each Item that when checked, automatically creates another SubPO (but a PO that truly is subordinate to the mainPO (maybe has the mainPO# as part of its number). The Main PO portion is automatically filled in with the MainPO info, the checked item and its quantity is automatically entered in the SubPO and the Batch# field of this and all other items in this SubPO would be automatically filled in with the MainPO#. The items created from this SubPO would have a barcode that is a combination of the MasterPO and the Item barcode.

Note: You have a Duplicate PO function that could be modified to include more info.

Why do we want this? We grow batches of "Blue Dream". We want to know at the customer level that the 1g Blue Dream being sold today is not the same 1g Blue Dream we sold them last month. If the dispensary happens to have both batches in the store at the same time, we would like it to have two separate scan codes. We need a batch tracking mechanism of sorts.

Asking for the moon:

To really, really make our lives simpler, if the breakdown (Internal Build) was smart enough to know which items can be created from a bulk derivative, it would automatically populate the remaining items for that build. The user would simply enter the quantities to those items and the breakdown would be complete.

Note: You have most of this created in the Recipe/Build Player.

As an example: "Blue Dream – Flower" is broken down into the following:

0.7g pre-roll
1g Dram
1.75g Dram
3g Dram
7g Dram

Rather than having to search through literally thousands of items to bring them to the Internal Build - if they just appeared with zero quantities, the Adilas user would just enter the quantities and the Internal Build is complete. This assumes that Adilas knows the derivative items are associated with the correct strain "Blue Dream" and not "Acapulco Gold". This may require a rethinking of the Item records.

Note: To some extent, you do some of this with Sub-Item inventory, except the sub-items are created on-the-fly and don't have their own unique weight or unique price/cost. They do have unique barcodes.

So, another table may need to be created with StrainName as the key field (main item) and all the sub-items tie to this field (with their own unique barcode). The goal would be to incorporate some logic (or hierarchy) within Adilas so it better understood the cannabis components and how they interact with each other.

We noodled this around when considering if we should move to your sub-item inventory system. In the end, we concluded that while sub-item inventory might streamline our process in a few places, it would not really help with the larger issues and might create new problems that we are currently not yet aware of.