



PLNTRK POS

& Manage Store User Guide

Complete operating handbook for store owners, managers, inventory teams, compliance staff,
and budtenders

MANAGE STORE	POS OPERATIONS	CHECKLISTS + REFERENCE
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Edition 1.0 | Source snapshot: ScottBorchert/PLNTRK main @ 037fbbea | July 16, 2026

Operational documentation - not legal, tax, or regulatory advice. Configure the platform for your jurisdiction and store policies.

1

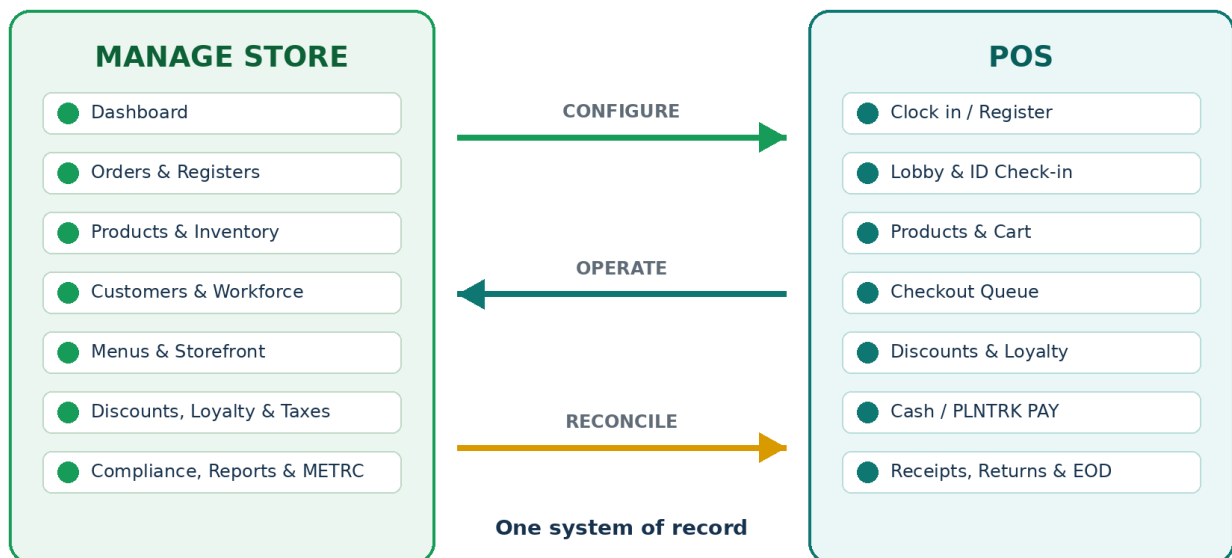
About this guide

Audience, scope, and how the two PLNTRK workspaces fit together.

This handbook explains the complete operating experience for the current PLNTRK store application: the Manage Store administration workspace and the customer-facing point-of-sale workspace used by store employees. It is written for people operating the software, not for developers.

NOTE

Source-derived edition: The workflows and labels in this guide were documented from the current ScottBorchert/PLNTRK main branch at commit 037fbbea. Store branding, enabled integrations, available data, and access permissions can change what an individual user sees.



Manage Store configures the business; POS executes the retail workflow; both feed the same orders, inventory, customer, compliance, and reporting records.

Store owners and administrators

Use Manage Store to configure products, inventory, employees, permissions, discounts, loyalty, taxes, compliance, menus, reports, storefront settings, registers, and integrations.

Managers and shift leads

Oversee registers, workforce, queue health, overrides, returns, closing, exceptions, and end-of-day reconciliation. Access depends on the account and current permission setup.

Budtenders and cashiers

Use POS to clock in, check in customers, build carts, queue orders, collect payment, send receipts, and assist with product questions.

Inventory and compliance staff

Maintain product/variant data, receive and adjust inventory, resolve reservations, monitor purchase limits, review audit history, and reconcile METRC.

CHECK

Current access model: In the reviewed build, Manage Store and Workforce controllers are owner-role protected, while POS requires an authenticated user and employee context. Your deployed configuration may add or refine role-based access.

Source note: Store.App/Views/Shared/_Layout.cshtml; Store.App/Views/Shared/_LayoutStorePos.cshtml; Store.App/Controllers/ManageStoreController.cs; Store.App/Controllers/StorePosController.cs.

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Contents and quick paths

Use the headings in Word navigation or the following map to jump to the workflow you need.

Guide area	What it covers
Part I - Getting Started	Navigation, account access, opening checklist, themes, mobile operation.
Part II - Manage Store	Dashboard, orders, registers, products, inventory, customers, employees, workforce, menus, discounts, loyalty, taxes, compliance, reports, pages, settings, custom domains, and METRC.
Part III - POS Operations	Time clock, register, lobby, ID verification, customer profile, product search, cart, queue, checkout, payments, receipts, returns, overrides, and end-of-day.
Part IV - Reference	Opening/closing checklists, troubleshooting, role matrix, terminology, and source map.

Frequently used paths

Task	Path
Start a shift	POS > employee menu > Clock In, then POS > Register.
Check in a customer	POS > Lobby > Check In Customer.
Start a sale	POS > Lobby > customer > Start Sale, or resume an open cart.
Checkout	POS > Checkout queue > select order.
Find an order	POS > Orders or Manage Store > Orders.
Create a product	Manage Store > Products > add/edit product.
Receive inventory	Manage Store > Products > product inventory.
Create a promotion	Manage Store > Discounts or Loyalty.
Review the day	POS > End of Day and Manage Store > Reports.
Close a drawer	POS > Register > Close Register.

INFO

Screenshots: This guide uses stable workflow diagrams and labeled paths instead of store-specific screenshots. That keeps it readable when branding, themes, menu content, or data change.

I

Getting Started

Understand the two workspaces, navigation, mobile controls, and the safest way to begin a shift.

3

Workspace navigation

Desktop, mobile, themes, and context switching.

PATH Manage Store navigation | Home | Orders | Products | Customers | Workforce | Menus | Reports | Taxes | Discounts | Loyalty | Pages | Docs | Settings

- Use Manage Store for configuration, oversight, reporting, and store administration.
- The desktop header and mobile off-canvas menu expose the same primary modules.
- Use the theme control to switch light/dark display when available. The choice is presentation only; it does not change data.
- Store branding and logo are loaded from the active store record.
- Use the POS link or mobile navigation to move into the retail workflow without changing the active store.

PATH POS navigation | Home | Lobby | Checkout | Customers | Products | Register | Orders

- POS is optimized for fast transaction work and includes a full-screen option, responsive mobile menu, shift status, clock actions, and the active register workflow.
- The employee menu exposes clock in/out and break actions. Shift summaries may show hours, sales, orders, and tasks.
- On mobile, the menu also provides Workforce and Manage Store links when the account is allowed to use them.
- Always verify the store name and active register before accepting payment.

CHECK

Store context: PLNTRK builds store-aware URLs using either the store slug or verified custom domain. Avoid copying a URL from one store into another store session.

Source note: Store.App/Views/Shared/_Layout.cshtml and Store.App/Views/Shared/_LayoutStorePos.cshtml.

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Opening a shift

Recommended sequence before serving the first customer.

1

Sign in and verify the store. Confirm the store name, logo, and location context shown in the header.

2

Clock in. Use the POS employee menu or Workforce time clock. End an old break/shift first if the system reports an active entry.

3	Open or select a register. Enter the register name and opening cash, or select an existing open register for this workstation.
4	Review operational alerts. Check waiting customers, low inventory, open carts, queued orders, payment exceptions, and unfinished tasks.
5	Verify sellable inventory. Confirm high-volume SKUs are in stock, package assignments are correct, and any METRC sync requirement is current.
6	Confirm checkout readiness. Test receipt printer/browser printing, customer email access, and PLNTRK PAY configuration if used.
7	Publish or verify menus. Confirm the active print/display menu reflects current products, prices, and stock handling.

Opening checklist

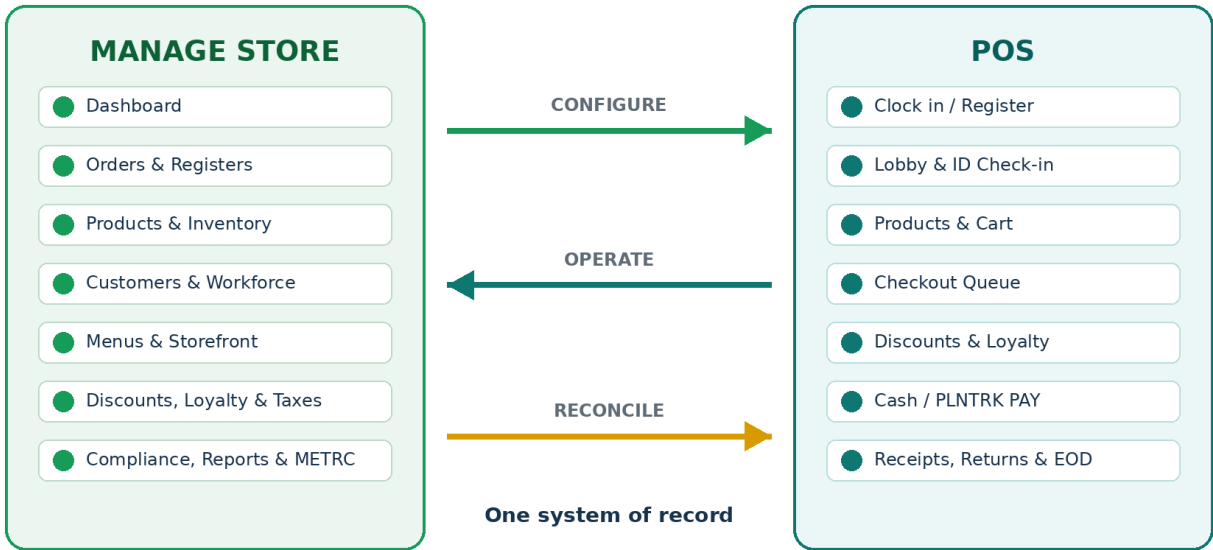
☐ Correct store is active	☐ High-priority tasks reviewed
☐ Employee is clocked in	☐ Low-stock alerts reviewed
☐ Register is open and selected	☐ Published menu checked
☐ Opening cash has been recorded	☐ Receipt workflow checked
☐ No unresolved pending bank payment	☐ METRC status reviewed when enabled

IMPORTANT	One workstation, one active register: The selected register is stored in the workstation session. If more than one register is open, explicitly select the drawer that belongs to that workstation.
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II

Manage Store

Configure the retail business, maintain data, oversee staff and inventory, and review performance.



5

Dashboard

Your operational summary and starting point.

PATH Manage Store > Home

- Review total orders, items sold, gross sales, weekly sales, and seven-day daily performance.
- Use recent purchases to open transaction details and verify customer, product, amount, and payment context.
- Review top products by revenue to guide replenishment and menu placement.
- Watch low-inventory alerts for variants that enforce inventory and are at or below the low-stock threshold.
- Confirm whether METRC is enabled and whether the API key/license configuration is complete.

Morning use

Scan low inventory, recent transactions, sales trend, and METRC readiness before opening.

Manager use

Compare weekly performance, identify product velocity, and investigate unusual orders.

Inventory use

Open flagged products and correct quantities, package links, or sellable variant setup.

End-of-day use

Use the dashboard as a high-level cross-check, then use formal POS closeout and reports for reconciliation.

INFO

Dashboard totals: The dashboard is an operational summary. Use Reports and register closeouts for date-controlled reconciliation and CSV exports.

Source note: ManageStoreController.Index builds weekly sales, recent purchases, top products, low inventory, and METRC readiness.

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Orders and transaction review

Search, filter, investigate, and reconcile sales records.

PATH Manage Store > Orders

- Use search, date filters, sort controls, page size, and list/grid views to find transactions.
- Each order shows customer, status, payment method, total, created date, and order identity.
- Open Order Details for line items, customer information, totals, payment context, notes, and the METRC sales receipt sync state when enabled.
- Use the POS order page for receipt actions, returns/exchanges, manager overrides, or operational follow-up.
- Use Cancelled Orders to review cancellation reason, payment references, inventory commitment, and whether reservations were released.

Status	Operational meaning	Recommended action
Created	Order record exists but is not yet completed.	Review before payment; do not treat as revenue.
Queued	Cart is ready for checkout.	Open from POS Checkout queue and collect payment.
Paid	Payment and sale finalization succeeded.	Issue receipt; review only unless return/void workflow applies.
Fulfilled	Completed fulfillment state.	Use approved return workflow for post-sale changes.
Cancelled	Sale did not complete or was voided.	Verify reservations released and review reason/audit history.

IMPORTANT

Do not edit history by hand: Paid or fulfilled orders should be handled through the approved return, exchange, or void workflow so inventory, loyalty, compliance, and audit records stay aligned.

7

Registers and cash oversight

Open drawers, active sessions, cash activity, and closeout history.

PATH Manage Store > Registers (advanced link) | POS > Register

- Manage Store lists open registers and recent closed sessions with opening cash, expected cash, counted cash, and over/short.
- Open a new register from POS. The store setting Max Open Registers controls how many drawers can be open at once.
- POS Register shows cash sales and drawer movements for the selected session.

- Use Pay In, Pay Out, Drop, Safe Drop, or Adjustment only with a clear reason and store policy approval.
- Closing calculates expected cash from opening cash, paid cash sales, and recorded movements, then stores counted cash and the over/short amount.

Movement	Effect on expected cash	Typical use
Pay In	Increases expected cash	Add approved cash to drawer.
Pay Out	Decreases expected cash	Approved petty cash or expense.
Drop	Decreases drawer cash	Remove excess cash during shift.
Safe Drop	Decreases drawer cash	Move funds to secure storage.
Adjustment	Currently treated as an increase	Correct documented discrepancy; verify policy before use.

CHECK

Register selection: Cash checkout is blocked until an open register is selected for the workstation. A bank payment can still be initiated, but keep register assignment consistent for reporting.

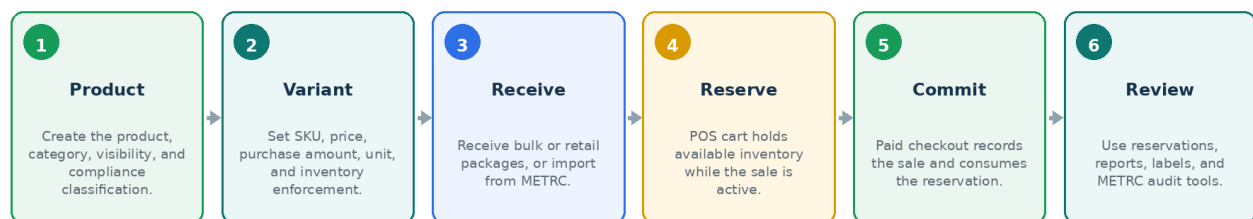
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Products, categories, variants, and images

Create the sellable catalog used by both Manage Store and POS.

PATH Manage Store > Products > Add Product / Edit Product

Inventory lifecycle



Product and variant setup defines what can be sold; inventory batches and reservations determine what is actually available.

Level	Key fields	Why it matters
Product	Name, description, category, brand, manufacturer/vendor, strain, cannabis type, lineage, effects, flavors.	Controls product discovery, display, compliance classification, and customer-facing content.
Flags	Staff pick, featured, new, visible online, medical only, menu sort order.	Controls merchandising and availability in public/menu contexts.
Variant	Name, SKU, price, sort order, inventory enforcement.	Defines the exact sellable unit selected in POS.

Level	Key fields	Why it matters
Compliance quantity	Purchase category, purchase amount, unit of measure.	Feeds purchase-limit calculations and package conversion.
Images	Upload, reorder, choose primary image, delete.	Used in product management, menus, storefront, and POS detail views.

1

Choose or create a category. Category influences browsing and default cannabis purchase category mapping.

2

Enter product details. Use clear factual language and avoid unsupported medical claims.

3

Add at least one variant. Provide a unique, scannable SKU, price, and inventory policy.

4

Set compliance purchase amount. For example, grams of flower or milligrams of edible THC represented by one unit.

5

Add images. Save the product first when using AI image generation; review generated content before publishing.

6

Save and verify. Open the product in POS to confirm price, variant, inventory, and customer-facing details.

CHECK

AI assistance: AI can draft product descriptions and images, and POS Budtender Copilot can explain product context. Staff remain responsible for accuracy, compliance, and avoiding medical claims.

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Inventory operations

Receive, convert, adjust, reserve, label, and troubleshoot inventory.

PATH Manage Store > Products > Product Inventory | **advanced: Inventory Reservations**

- Receive bulk inventory with package identifier, quantity, unit, source, dates, METRC package ID, and notes.
- Receive retail packages against a sellable variant after its purchase amount and unit are configured.
- Create sellable inventory from a bulk batch by selecting the source, variant, package count, and quantity per package.
- Adjust a batch only with a non-zero quantity change and a clear reason. Auditing can record the action.
- POS cart additions create reservations so another sale cannot consume held units.
- Use Inventory Reservations to search active, released, completed, or attention-needed holds. Release only when the linked cart/order is genuinely abandoned or invalid.

- Use the Label Center to print product/variant labels with optional product name, SKU, price, border, and selected label size.

Problem	What to inspect	Safe next step
Product shows out of stock	Variant inventory enforcement, active batches, quantity remaining, active reservations.	Correct receipt/adjustment data or release only a verified stale reservation.
Barcode/scan does not find item	Package identifier, variant SKU, barcode image, active product/variant state.	Correct the identifier and reprint label.
Cannot receive retail packages	Variant purchase amount/unit or product/variant mismatch.	Complete compliance quantity setup first.
Reservation needs attention	Expired hold, missing cart/order link, cancelled order, inactive batch, quantity mismatch.	Review source record; use admin release with a documented reason.
Inventory differs from METRC	License/API setup, sync date range, package IDs, latest run errors.	Run controlled sync and review request logs before adjusting local inventory.

IMPORTANT

Reservation safety: Releasing a paid order reservation is blocked. Use the return or void workflow instead of manipulating committed inventory.

10**Customers**

Profiles, verification history, visits, spend, and operational status.

PATH Manage Store > Customers | POS > Customers

- Manage Store provides the customer directory and detail view for contact information, order count, lifetime value, and order history.
- POS Customers adds operational information: age, latest identification, expiration status, blocked status/reason, last verification, active check-in, order count, and spend.
- Use Check In on an existing profile to avoid duplicate records when identity matches.
- Use customer notes for relevant store-operational context. Avoid unnecessary sensitive information.
- Blocking a customer prevents a new sale and displays the block reason to staff.

INFO

Identity handling: The current service stores hashes and last-four values for identification fields rather than exposing full ID numbers in customer lists. Follow store privacy policy when entering notes or scan data.

11**Employees, permissions, and Workforce**

Team access, time clock, tasks, certifications, attendance, and audit reporting.

PATH Manage Store > Workforce | Manage Store > Permission Groups

- Create employees with email, name, password, optional PIN, status, permission group, and force-PIN-change setting.
- Edit status, permission group, and security settings; suspend, reactivate, deactivate, or reset password/PIN as policy allows.
- Permission groups organize named permission keys into reusable roles.
- Workforce Dashboard summarizes team operations. Employees shows live clock status, sales, hours, and activity.
- Time Clock supports clock in/out and breaks. Attendance tracks exceptions such as late arrivals, no-shows, missed breaks, and related notes.
- Tasks support opening, closing, restocking, inventory, compliance, cleaning, and register follow-ups.
- Certifications track required training, issue/expiration dates, certificate numbers, and notes.
- Workforce Reports and Audit Reports support labor, sales, tasks, certifications, approvals, security events, and sensitive-change review.

Operational area	Examples	Manager habit
Access	Permission groups, employee status, password/PIN.	Review immediately after role changes or separation.
Time	Clock entries, breaks, daily labor.	Resolve missed punches before payroll/reporting.
Performance	Employee sales, hours, tasks.	Use context; do not evaluate only by gross sales.
Compliance	Certifications and attendance events.	Review expiring requirements weekly.
Audit	Price, inventory, discount, return, register, override, login/security events.	Filter by date, employee, category, action, or search term.

CHECK

Current build note: Employee profile notes are currently presented as a scaffolded action in the reviewed controller. Do not assume a note is persisted unless your deployed version confirms it.

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Dispensary menus

Build print, online, lobby, and display menus from active inventory.

PATH Manage Store > Menus

1

Create or edit a menu. Set name, description, header/footer notes, and visual settings.

2

Select catalog items. Choose product variants and optionally override display name, category, description, featured status, and sort order.

3

Set visibility options. Choose whether to include out-of-stock items and show prices, cannabinoids, and images.

4	Publish. Published print links are publicly available; digital display preview can be used for in-store screens.
5	Distribute. Use print URL, display URL, QR code, or generated PDF.
6	Maintain. Update items, pricing, and inventory handling whenever the active catalog changes.
Print menu Customer-friendly printable page with QR support and optional PDF download.	Digital display Large-screen layout for lobby or sales floor displays.
POS menu access POS can open print and display menus without leaving the retail workflow.	Management preview Preview visual settings before publishing and verify public URLs.
CHECK	Out-of-stock products: Decide intentionally whether the menu should hide or show unavailable items. The setting does not create inventory; POS availability still follows variant inventory rules.

13	Discounts Create reusable checkout promotions with eligibility and usage rules.
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PATH Manage Store > Discounts

Rule	Available configuration	POS effect
Value	Percentage or fixed amount; optional maximum cap.	Calculated against eligible order lines.
Threshold	Minimum eligible subtotal.	Rejected if eligible merchandise is below threshold.
Schedule	Active flag, start date, end date.	Only currently active rules appear for checkout.
Code	Optional code and Require Code flag.	Budtender enters code; comparison is case-insensitive.
Scope	Entire order, selected categories, or selected products.	Only matching lines contribute to the discount.
Customer	Everyone, new, returning, medical, or adult-use.	Validated against customer history/check-in.
Limits	Total uses and per-customer uses.	Paid/fulfilled prior uses consume the limit.

1	Create the rule. Use a recognizable internal name and accurate customer-facing code if applicable.
2	Set scope and eligibility. Select the exact products/categories and customer group.
3	Set dates and limits. Use zero only when you intend no limit.
4	Save and test. Build a controlled POS order that qualifies and one that should fail.
5	Apply at checkout. Select the rule, enter code when required, and confirm the new total and tax lines.
6	Audit exceptions. Use manager override and audit reporting when store policy requires approval.
CHECK	One selected discount: The current order snapshot stores one named discount amount. Do not promise stacking behavior unless your deployed version has explicitly implemented it.
14	Loyalty program Configure earning and redemption for saved customers.

PATH Manage Store > Loyalty

Setting	Meaning
Program name	Customer-facing/internal name for the store rewards program.
Active	Enables the program for earning and redemption.
Points per dollar	Points earned for each eligible dollar.
Point value	Dollar value of one point when redeemed.
Minimum redemption	Minimum number of points required for a redemption.
Maximum points per order	Optional cap; zero means no configured cap.
Earn on tax	Adds tax to the earning base when enabled.
Earn on discounted amount	Uses the post-discount merchandise amount when enabled.

- Only a saved customer can redeem points.
- At checkout, enter the requested points and apply the redemption before completing payment.
- The service limits redemption by available balance, configured maximum, minimum redemption, and eligible order value.

- Points are deducted and earned only when the order is finalized as paid; the order and receipt record redeemed/earned amounts.
- The loyalty ledger prevents the same paid order from posting loyalty twice.

TIP

Customer communication: Program values vary by store. Train staff to explain the current points value, minimum, exclusions, and whether tax/discounted amounts earn points.

15**Taxes**

Build the rules that recalculate at checkout and appear on receipts.

PATH Manage Store > Taxes

Setting	Options / use
Calculation type	Percentage or fixed amount.
Scope	All items, cannabis only, non-cannabis only, or purchase category.
Customer group	Everyone, adult-use only, or medical only.
Compound	Calculates after previously accumulated taxes.
Include previous taxes in base	Adds earlier taxes to the taxable amount.
Sort order	Controls calculation sequence.
Reporting code	Reference value for accounting/filing support.
Active	Only active rules calculate.

- Use Seed Defaults only as a starting point and verify every rate and scope with qualified tax/compliance guidance.
- Order taxes are recalculated when checkout opens and after discounts or loyalty changes.
- The receipt shows tax lines and store-configured compliance footer/warning text.
- Use the Tax Report for date-based totals and CSV export.

IMPORTANT

Tax responsibility: PLNTRK applies configured rules; it does not determine which rules are legally correct for your store. Validate rates, exemptions, customer groups, and compounding with qualified advisors.

16**Compliance Center**

Age/ID rules, purchase limits, inventory safeguards, audit controls, and receipt language.

PATH Manage Store > Settings > Compliance Center

Area	Examples
Customer verification	Adult-use and medical minimum age, require ID every visit, reject expired ID, allow caregivers.
Purchase limits	Adult-use, medical, and caregiver limits for flower grams, concentrate grams, and edible THC milligrams.
Inventory safeguards	Prevent negative inventory and require package assignment.
Audit controls	Inventory adjustments, price changes, discount changes, and refunds.
Receipt language	Required warning text and custom receipt footer.
METRC context	Displays whether METRC is enabled and supports related reports/sync review.

- Check-in rejects or flags customers based on blocked status, date of birth, ID expiration, visit type, and configured ages.
- POS customer detail compares current daily purchase totals with program-specific limits.
- Checkout validates the pending order against purchase limits before cash or bank payment finalizes.
- Paid orders update the customer purchase ledger and daily totals.
- Audit-enabled actions capture before/after data, actor, IP, and user-agent context.

TIP

Use configuration, not memory: When regulations or store policies change, update the Compliance Center and tax rules first. Do not rely on verbal workarounds at checkout.

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Reports

Sales, products, taxes, compliance, inventory, workforce, and audit exports.

PATH Manage Store > Reports | Workforce > Reports / Audit Reports

Report	Use it for
Sales Summary	Daily orders, items, gross sales, discounts, tax, net sales, and payment-method breakdown.
Product Performance	SKU-level units, order count, revenue, and average unit price.
Tax Report	Gross/taxable sales, tax collected, and effective rate.
Compliance Sales	Cannabis purchase-category totals and reconciliation support.
Compliance Inventory	Active packages, METRC IDs, source, quantities, expiration risk, and missing package IDs.
Workforce Reports	Labor hours, employee sales, attendance, tasks, training, and certifications.
Audit Reports	Security/access events, approvals, manager overrides, and sensitive operational changes.

- Choose an explicit start and end date. If reversed, the system normalizes the range.
- Use Download CSV for analysis or accounting handoff.
- Reconcile reports to the POS End-of-Day page and register sessions, especially when returns or late postings exist.
- Use report data as an operational source, then follow your accounting and regulatory record-retention process.

18

Store pages, branding, settings, and custom domain

Control the storefront identity and public content.

PATH Manage Store > Pages | Manage Store > Settings | Settings > Custom Domain

Store Info Store name, slug, phone, address, description, notification email, and support contact.	Branding Primary/secondary colors, text/hero colors, logo, header image, and theme.
Shipping & Social Default shipping method, customer toggle, and social links when e-commerce options are enabled.	METRC Store license number and user API key; key is masked when displayed.
Pages Create/publish storefront pages with section-based content and optional AI drafting.	Custom Domain Check availability, start Cloudflare setup, publish DNS records, refresh status, or clear setup.

1

Save core store information. Confirm name, slug, address, contact details, and notification email.

2

Apply branding. Upload current logo/header and test light/dark readability.

3

Review commerce options. Set default fulfillment/shipping behavior only if the storefront uses it.

4

Create pages. Use clear slugs, publish intentionally, and review AI-generated content.

5

Connect a domain. Enter only a hostname, add the displayed DNS records, then check status until hostname and SSL are active.

6

Test public URLs. Open storefront, menu print/display, support links, and contact information in a private browser.

CHECK

Slug and domain changes: Changing a slug or custom domain affects links used by customers, staff, menus, QR codes, and bookmarks. Plan and test the change before advertising it.

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METRC and advanced integrations

Inventory sync, sales-receipt audit, and the sandbox seed-to-sale workflow.

PATH Manage Store > Settings > METRC | advanced METRC Inventory / Sync Runs / Receipt Sync / Workflow

- Configure the store METRC license and API key. Vendor key configuration is deployment-level.
- Run inventory sync with a controlled last-modified date range. Review warnings and request-level logs instead of repeatedly retrying blindly.
- Open a sync run to review status, request count, successes/failures, endpoint, duration, record count, and archived JSON downloads.
- Paid POS orders can queue METRC sales receipt reporting. Order Details links to the receipt sync record and allows an approved retry when integration is enabled.
- The advanced 22-step sandbox workflow covers cultivation preparation, package creation, facility transfer, retail receiving, inventory import, test sale, and verification. It is an integration/test tool, not a normal budtender workflow.

IMPORTANT

Credentials: Treat API keys as secrets. Use the masked display, do not paste keys into tickets or screenshots, and rotate compromised credentials.

CHECK

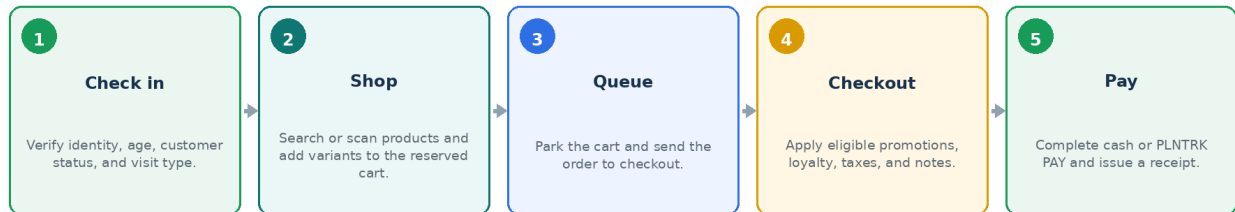
Advanced workflow: Run the sandbox workflow only with qualified METRC/integration staff. Each step carries IDs and package labels into later requests, and some endpoints/bodies may require jurisdiction-specific adjustments.

III

POS Operations

Run the customer visit from clock-in and identity verification through payment, receipt, and closeout.

Standard customer sale



20

POS home, time clock, and register

Establish employee and drawer context before selling.

PATH POS > Home | employee menu | POS > Register

- POS Home summarizes waiting customers, blocked/refused activity, low inventory, paid order count, gross sales, cash collected, open carts, and low-stock items.
- Clock In, Clock Out, Start Break, and End Break are available from the employee menu and post directly to Workforce records.
- Open or select the register assigned to the workstation. When only one register is open, PLNTRK can select it automatically.
- Register activity combines cash sales and drawer movements in time order.
- Use the full-screen and theme controls for the workstation environment without affecting business data.

IMPORTANT

Before cash checkout: A selected open register is mandatory for cash. If checkout says no register is open, use the provided register link, then return to the order.

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Lobby and customer check-in

Verify the customer and create the active visit.

PATH POS > Lobby > Check In Customer

1	Scan or enter identity details. Provide date of birth; enter expiration date, jurisdiction, ID type/number, names, and scan value as available.
2	Select visit type. Mark medical or caregiver only when verified and allowed by store policy.
3	Review the customer record. PLNTRK creates or updates the profile and identification record.
4	Run verification. The system evaluates blocked status, expired ID policy, caregiver policy, and minimum age.
5	Handle failures. A failed verification does not create an active lobby check-in. Explain the store decision and use the documented refused/manual-review process.
6	Complete check-in. A passed customer appears in the Lobby with Waiting status.

Lobby status	Meaning	Next action
Waiting	Verified customer is waiting to shop.	Open customer and start sale.
In Progress	Customer has an active shopping session/cart.	Resume products or cart.
Ready for Checkout	Cart was parked/queued.	Open from Checkout queue.
Refused	Visit failed or was manually refused.	Do not start sale; retain reason per policy.
Cancelled	Visit was closed without sale.	New visit is required for another sale.
Completed	Paid sale finished.	Use order/receipt history for follow-up.

CHECK	Date of birth required: The current check-in flow requires a date of birth before it can create an active visit.
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22	Customer detail and purchase limits Make the sale decision before adding products.
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PATH POS > Lobby > customer card

- Review age, identification, blocked status/reason, visit status, notes, and medical/caregiver state.
- Review today's flower grams, concentrate grams, and edible THC milligrams against the configured program limits.
- Near-limit and over-limit states help staff recognize risk before checkout.
- Start Sale moves an eligible waiting visit to In Progress and opens the product catalog.
- Cancel closes the visit. Refused records a refusal reason and returns to the lobby.

IMPORTANT

Hard stops: A blocked customer, closed/refused visit, underage adult-use customer, or over-limit condition can prevent the sale. Do not bypass the check by creating an unrelated customer record.

23

Product search and Budtender Copilot

Find sellable variants and give responsible product assistance.

PATH POS > Products | active sale > Add Products

- Search by product name, variant, SKU, or available supported identifier.
- A package-identifier scan can resolve directly to the related product; otherwise normal product search runs.
- Use category and sort controls to narrow the catalog.
- Variant availability reflects active inventory and reservations when inventory enforcement is enabled.
- Open product detail for description, images, variants, pricing, and inventory context.
- Budtender Copilot can explain lab context, suggest responsible selling language, compare fit, or answer a question using product and optional customer-history context.

CHECK

Responsible assistance: Copilot prompts explicitly avoid medical claims and invented lab values. Treat the response as staff assistance, verify product facts, and never promise treatment, cure, prevention, or diagnosis.

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Cart, reservations, parking, and checkout queue

Build the order without losing inventory control.

- Adding a variant increases the customer cart quantity and reserves inventory for a limited period.
- Updating quantity adjusts the reservation; removing an item releases its cart reservation.
- Park Cart or Queue Cart creates a queued order, transfers reservations from cart rows to order items, marks the check-in Ready for Checkout, clears the cart, and sends the order to the checkout line.
- Open carts remain visible in the Lobby with item count, total, last activity, and Resume link.
- Continue Shopping can restore an eligible queued order to the cart, move reservations back, cancel the old queued order, and return the visit to In Progress.

Action	Use it when	Result
Resume cart	Customer returns before checkout.	Same customer cart reopens with reserved items.
Park / Queue	Shopping is finished or another cashier will collect payment.	Queued order appears in Checkout.
Continue shopping	Queued order needs additional products.	Old queued order is cancelled and items return to cart.
Cancel order	Sale will not proceed.	Order cancels and reservations release when allowed.

IMPORTANT

Pending payment lock: A queued order with a pending bank payment must be completed or cancelled before it can return to shopping.

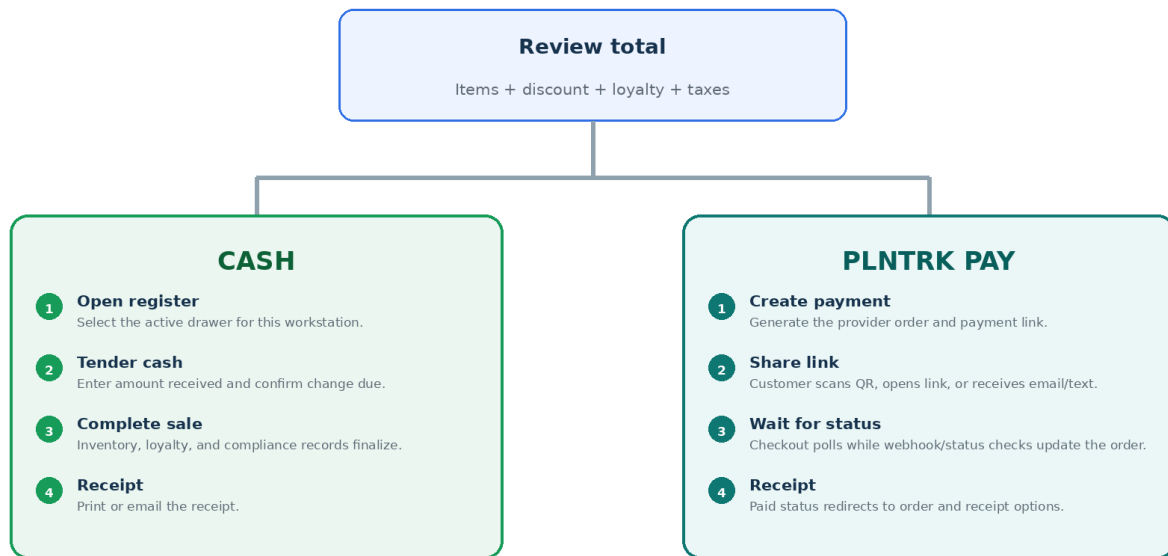
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Checkout overview

Confirm the customer, order, promotions, tax, notes, and payment method.

PATH POS > Checkout > select queued order

Checkout payment paths



Both paths end in the same paid order, inventory commitment, loyalty finalization, and reporting flow.

Cash and PLNTRK PAY use different collection steps but converge on the same paid-order finalization flow.

Checkout review

☐ Correct customer and visit	☐ Tax lines reviewed
☐ Correct products, variants, quantities, and prices	☐ Purchase limits still allowed
☐ No blocked-customer warning	☐ Register selected for cash
☐ Discount eligibility/code verified	☐ Payment method confirmed with customer
☐ Loyalty balance and redemption confirmed	☐ Receipt destination confirmed

INFO

Totals recalculate: Checkout recalculates taxes when opened and after discount or loyalty changes. Read the final amount due after each change.

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Applying discounts and loyalty at POS

Use only promotions and points that the order qualifies for.

1

Select a discount. Choose from active rules available to the store.

2

Enter the code. Required-code discounts fail until the correct code is entered.

3

Apply. PLNTRK checks dates, minimum eligible subtotal, scope, customer group, and usage limits.

4

Review the new total. Confirm discount name/amount and updated taxes.

5

Apply loyalty. Enter points after confirming customer balance, minimum, and customer consent.

6

Review again. Confirm merchandise discount, loyalty discount, tax, and total due.

CHECK

Manager override: When store policy or the interface requires approval, request a discount override, wait for manager approval, then apply the approved request to the same order.

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Cash checkout

Complete a drawer-linked cash sale and issue the receipt.

1

Select Cash. Confirm an open register is active on the workstation.

2

Enter cash tendered. The amount must be at least the final order total.

3

Add notes if needed. Use concise operational notes; do not store unnecessary sensitive data.

4	Choose email receipt when requested. Enter and verify the email address before completing.
5	Complete sale. PLNTRK revalidates limits, commits inventory, finalizes loyalty, completes the visit, and queues METRC reporting when enabled.
6	Give change and receipt. Use the displayed change due and open the completed order.
IMPORTANT	Insufficient tender: The sale is blocked when cash tendered is below the final total. Recheck discount/loyalty changes and the amount entered.
28	PLNTRK PAY bank payment Create, share, monitor, or cancel a pending digital payment.
1	Start bank payment. PLNTRK recalculates the order, validates purchase limits, and creates the provider order.
2	Share with the customer. Use the QR code, open/copy the payment link, email the link, or text the link.
3	Wait for status. The provider webhook and POS status checks update Pending, Paid, or Failed state.
4	Do not duplicate. Do not start a second payment while the first provider order is pending.
5	Complete on Paid. POS directs staff to the paid order/receipt once payment succeeds.
6	Switch to cash only after cancellation. Cancel the pending payment, confirm the order returned to Not Started, then use cash checkout.
INFO	Customer contact: Email/text link actions require a valid address/phone and an active pending PLNTRK PAY link on the order.

IMPORTANT

Amount mismatch: If the provider amount differs from the recalculated order total, PLNTRK records an amount-mismatch status and does not mark the order paid. Escalate instead of forcing completion.

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Receipts and order history

Print, email, and review completed sales.

PATH POS > Orders > order > Receipt

- Orders can be searched, sorted, filtered by status, and opened from transaction history.
- The order view shows items, subtotal, discount, loyalty discount, taxes, total, payment method/status, notes, and provider context when applicable.
- Receipt view recalculates taxes, includes the configured warning text/footer, and supports browser printing.
- Email Receipt validates the address and sends the current order receipt.
- Receipts can show loyalty points redeemed, points earned, and the customer balance when available.
- Use Manage Store Order Details for METRC sales-receipt sync context and broader back-office review.

TIP

Do not re-ring a receipt: If the customer needs another copy, reopen the paid order and reprint/email. Do not create a duplicate sale.

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Returns, exchanges, voids, and manager overrides

Use controlled exception workflows after or before payment.

Workflow	When to use	Key controls
Return / Exchange	Paid or fulfilled order; customer returns selected units.	Choose line quantities, reason, notes, and whether to restock.
Void / Cancel	Eligible non-final order or approved void workflow.	Paid/fulfilled orders cannot use simple cancellation.
Manager Override	Refund, discount, void, or drawer exception requires approval.	Request contains type, reason, notes, order, requester; manager approves/denies.
Inventory release	Stale or invalid reservation only.	Paid inventory cannot be released; use return/void.

1

Open the original order. Verify identity, status, payment, items, and previous returns.

2

Choose the correct workflow. Return/exchange for paid items; cancel for eligible unpaid order; override when approval is required.

3	Document the reason. Use a specific operational reason and notes.
4	Select restock carefully. Restock only items that are legally and operationally eligible to return to inventory.
5	Review the outcome. Confirm refund/return record, payment status, inventory movement, order note, and audit event.
CHECK	Refund handling: The reviewed return service records the return/refund state in PLNTRK. Follow the actual payment-provider and store refund procedure required to move funds back to the customer.
31	End-of-day and closing Reconcile transactions, drawer, exceptions, and employee status.

End-of-day closeout



A clean closeout resolves exceptions before the register is closed and the employee clocks out.

- POS End of Day shows paid order count, gross sales, cash sales, digital sales, refunds, and return records for the selected business date.
- Review pending or failed payments, cancelled orders, and queued orders that should not carry forward.
- Compare cash sales and drawer movements to the physical cash count.
- Close the active register with counted cash and closing notes. Review expected cash and over/short.
- Complete closing tasks, end any break, and clock out.
- Use Manage Store Reports for formal period reporting and CSV export.

Closing checklist

☐ All completed customers marked paid/completed	☐ Cash movements documented	☐ METRC failures reviewed
☐ Pending bank payments resolved	☐ Physical drawer counted	☐ Closing tasks completed
☐ Queued orders reviewed	☐ Expected versus counted reviewed	☐ Employee clocked out
☐ Returns/refunds reviewed	☐ Register closed	☐ Reports/export retained per policy

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Checklists and Reference

Fast answers for daily operations, troubleshooting, training, and source traceability.

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Daily role checklists

Condensed procedures for common store roles.

Role	Start of shift	During shift	End of shift
Budtender / cashier	Clock in; confirm store/register; review lobby and tasks.	Verify IDs; build carts; apply approved offers; collect payment; issue receipts.	Resolve cart/order handoff; complete tasks; clock out.
Shift lead / manager	Review staff coverage, open registers, low stock, exceptions.	Approve overrides; monitor queue; handle returns; review drawer movements.	Run EOD; count/close drawers; review over/short and unresolved orders.
Inventory staff	Review low stock, reservations, METRC status, receiving plan.	Receive/convert/adjust inventory; print labels; investigate holds.	Reconcile movements; document exceptions; review sync logs.
Compliance staff	Review configuration changes, expired certs, audit alerts.	Monitor verification, limits, refunds, price/discount/inventory changes.	Review audit reports, compliance sales/inventory, METRC failures.
Store owner	Review dashboard, staffing, cash/register and alerts.	Maintain products, pricing, promotions, settings, domain, menus, reports.	Review financial/compliance reports and significant exceptions.

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Troubleshooting

Common messages, likely causes, and safe responses.

Symptom	Likely cause	Safe response
Customer cannot check in	Missing DOB; blocked profile; expired ID policy; caregiver not allowed; age below configured minimum.	Review entered identity and compliance settings. Do not create an alternate profile to bypass a failure.
Cannot start sale	Blocked customer, refused/cancelled visit, underage adult-use, or closed visit.	Open customer detail and resolve the underlying status according to policy.
Item cannot be added / out of stock	No available batch quantity, active reservation, inactive variant, or inventory enforcement.	Review product inventory and reservations; do not oversell.
Cart disappeared from lobby	It may have been parked/queued or restored to a different active visit.	Check Checkout queue, open carts, Orders, and customer visit.
Discount fails	Inactive/expired, wrong code, threshold, wrong scope/customer group, or usage limit.	Read the exact error; confirm rule and order eligibility.

Symptom	Likely cause	Safe response
Loyalty fails	No saved customer, inactive program, insufficient balance, below minimum, or zero point value.	Review customer balance and program settings.
Cash checkout blocked	No active register or tender below total.	Select/open register and re-enter tender after final total.
Bank payment stays pending	Customer has not completed, provider delay, status check issue, or provider order problem.	Refresh status; verify link/order; do not start duplicate payment. Cancel before switching to cash.
Amount mismatch	Provider amount differs from recalculated PLNTRK total.	Stop and escalate; do not mark paid manually.
Receipt email fails	Invalid email or mail service/configuration issue.	Correct address and retry from receipt/order; print if appropriate.
Cannot return/void	Wrong order status, no selected lines, quantity too high, or required override missing.	Use the correct workflow and obtain approval.
Inventory reservation stuck	Expired/orphaned hold, cancelled order, inactive batch, or quantity mismatch.	Review the reservation source and release only with a documented reason.
METRC sync fails	Missing keys/license, invalid range, endpoint error, or data mismatch.	Open the sync run and request logs; correct configuration/data before retry.
Custom domain pending	DNS record missing/incorrect or SSL/hostname still provisioning.	Copy exact DNS values, wait for propagation, then Check Domain Status.

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Role and permission quick reference

Typical responsibilities; actual access follows the deployed role/permission configuration.

Role	Typical scope
Store owner / administrator	Manage Store, Workforce, settings, products, promotions, tax/compliance, reports, integrations, employees, permissions, domains.
Store manager / shift lead	POS operations, register oversight, employee activity, overrides, returns, closeout, reports as granted.
Budtender / cashier	POS lobby, check-in, customer, products, cart, queue, checkout, payments, receipts.
Inventory specialist	Products/variants, inventory receipt/conversion/adjustment, labels, reservations, METRC inventory tools.
Compliance manager	Compliance Center, purchase limits, audits, reports, receipt language, METRC reconciliation.
Viewer / reporting user	Dashboard and reports only when configured; no operational changes.

TIP

Least privilege: Give each person only the access needed for their responsibilities, and remove or suspend access promptly when duties change.

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Glossary

Common PLNTRK terms used throughout this guide.

Term	Definition
Active register	The open drawer session selected for the current workstation.
Check-in	A verified customer visit with waiting/in-progress/checkout/completed status.
Customer profile	Saved identity/contact/notes/loyalty/history record used by POS.
Inventory batch	A quantity record tied to a package/source and optionally a sellable variant.
Inventory reservation	Temporary hold linking available inventory to a cart or order item.
METRC	External regulatory track-and-trace integration used where configured.
PLNTRK PAY	The POS bank-payment workflow currently backed by the configured GreenCard provider integration.
Purchase category	Flower, concentrate, edible, or other classification used for compliance totals.
Queued order	A parked cart converted to an order and ready for checkout.
Recordstate	Soft-state field used to keep active/deleted records without hard deletion.
Store slug	URL-safe store identifier used in store-aware paths when no custom domain is active.
Variant	The priced/SKU sellable unit under a product.

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Repository source map and edition notes

Where this guide was derived from and how to maintain it.

Source	Guide coverage
Store.App/Views/Shared/_Layout.cshtml	Manage Store desktop/mobile navigation, theme, store context.
Store.App/Views/Shared/_LayoutStorePos.cshtml	POS navigation, employee time-clock menu, full screen, mobile controls.
Store.App/Controllers/ManageStoreController.cs	Manage Store, products, inventory, settings, menus, discounts, loyalty, taxes, compliance, reports, registers, METRC, reservations.
Store.App/Controllers/StorePosController.cs	Lobby, check-in, customers, products, carts, queue, checkout, payments, receipts, returns, overrides, EOD.
Store.App/Controllers/WorkforceController.cs	Employees, time clock, attendance, tasks, certifications, workforce and audit reports.
NordicNectar.Services/StoreService.cs	Core order, cart, inventory, payment, discount, loyalty, tax, compliance, register, return, and reporting behavior.
NordicNectar.Services/IStoreService.cs	Service contract used by controllers.
NordicNectar.Data/Models/Store.cs	Store, product, order, inventory, discount, loyalty, tax, compliance, register, and related entities.
NordicNectar.Data/Enums.cs	Statuses, payment types, permissions, customer programs, scopes, and classifications.

Source	Guide coverage
Store.App/Views/ManageStore/*	User interface labels and controls for administrative modules.
Store.App/Views/StorePos/*	User interface labels and controls for the retail POS.

NOTE

Maintenance recommendation: Regenerate or review this guide when navigation, controller actions, payment providers, compliance rules, workflows, or user-facing labels materially change.

End of guide

PLNTRK POS & Manage Store User Guide - Edition 1.0