



STORE MANAGEMENT USER GUIDE

Purchasing & Receiving

How to manage vendors, purchase orders, deliveries, inventory batches, and METRC-linked receiving in PLNTRK Store.

Audience: Store owners, managers, inventory staff, and receiving staff

PLNTRK Store Management | August 2026

PLNTRK | Purchasing operations made traceable from order through inventory receipt.

1. What Purchasing does

The Purchasing area gives your store one place to track who you buy from, what you ordered, what has arrived, and how each delivery becomes inventory. It is designed to keep the operational record of a purchase order separate from the inventory package record while linking the two when a receipt is posted.

1 Vendor Create or select the supplier.	2 Purchase Order Add products, quantities and costs.	3 Order Set the PO to Ordered.	4 Receive Record full or partial delivery.	5 Inventory Create or link the correct package/batch.
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PATH	Where to find it In Store Management, open Purchasing from the left navigation. The Purchasing dashboard links to Vendors, Purchase Orders, and Receiving.
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Dashboard at a glance

The Purchasing dashboard summarizes current activity and shows recent purchase orders. The four summary values are:

Metric	What it tells you
Active vendors	How many supplier records are currently active.
Open purchase orders	POs that are still in an active ordering or receiving stage.
Awaiting receipt	Orders that are ready for receiving work.
Open PO value	The current value of open purchase orders based on ordered quantities and unit costs.

2. Vendors

Create a vendor before building a purchase order. Vendor records are used as the supplier identity on the PO and can also hold compliance-related supplier information.

Vendor fields

Field	Use
Name	Required supplier name shown throughout Purchasing.
METRC license number	Supplier license information when applicable.
Contact / Email / Phone	Primary purchasing or receiving contact.
Address	Supplier mailing or business address.
Notes	Internal purchasing notes.
Active vendor	Controls whether the vendor is available for normal purchasing use.

Create or edit a vendor

1. Open Purchasing > Vendors.
2. Choose Add Vendor, or Edit beside an existing vendor.
3. Enter the vendor details. Name is required.
4. Add the METRC license number when it is useful for your purchasing/compliance workflow.
5. Select Save vendor.

TIP

Recommended practice

Keep duplicate vendors out of the system. Update an existing supplier record when contact information changes instead of creating a second version.

3. Purchase Orders

A purchase order (PO) is the operational record of what your store intends to receive. PLNTRK assigns the PO number after the first save, using the format PO-000001, PO-000002, and so on.

PO statuses

Status	Meaning	Receiving behavior
Draft	Still being prepared.	Cannot be received.
Ordered	Released to the vendor / ready for delivery.	Appears in Receiving.
Partially Received	At least one line has been received, but the PO is not complete.	Appears in Receiving until complete.
Received	All ordered quantities have been received.	No further receiving is allowed.
Cancelled	PO will not be fulfilled.	Cannot be received.

RULE

Status protection

Once receiving starts, the PO cannot be moved back to Draft or cancelled. Receiving statuses are calculated automatically from actual receipts.

Create a purchase order

6. Open Purchasing > Purchase Orders and choose New Purchase Order.
7. Select the vendor.
8. Set the status to Draft while preparing the PO. Change it to Ordered when it is ready for receiving.
9. Enter Ordered date and Expected date as needed.
10. Add PO lines. Each line can be a manual/non-inventory item, bulk inventory product, or sellable product variant.
11. Enter the ordered quantity, unit cost, and unit of measure.
12. Save the purchase order.

Choosing the correct line type

Line type	When to use it	Inventory result
Manual / non-inventory	Freight, service fees, supplies you do not want tracked as inventory, or other PO costs.	Receipt is recorded, but no InventoryBatch is created.
Bulk inventory	Unpackaged or bulk product inventory that is not tied to a sellable variant.	Can create or link a bulk inventory batch using the selected physical unit.
Sellable variant	A retail-ready product variant / SKU.	Tracked as whole sellable units (Each) when new local inventory is created.

Editing a PO after receiving starts

PLNTRK protects data that already has receiving history. A line that has received quantity cannot be removed, and its product, variant, or unit of measure cannot be changed. You may still adjust allowed PO information as long as it does not invalidate an existing receipt.

- The ordered quantity cannot be reduced below the quantity already received.
- Received lines remain locked to the same product/variant/unit identity.
- The PO status becomes receipt-driven once any line has received inventory.

4. Receiving

The Receiving screen shows purchase orders that are in Ordered or Partially Received status. You can receive a whole PO over one delivery or post multiple partial receipts over time.

Standard receiving steps

13. Open Purchasing > Receiving.
14. Choose Receive for the correct PO.
15. Find the delivered line item.
16. Enter the quantity received and the actual unit cost.
17. For inventory items, choose whether to link an existing inventory package/batch or create a new one.
18. Add receiving notes when helpful.
19. Post the receipt. PLNTRK updates the line quantity received and recalculates the PO status.

TIP

Partial deliveries are supported

If the vendor ships less than the ordered amount, receive only what arrived. The PO becomes Partially Received and remains in the Receiving list until all lines are complete.

5. Inventory behavior during receiving

Option A - Create a new local inventory batch

Use this when the delivery is genuinely new inventory in PLNTRK and the product/variant is not requiring a METRC package link. If you leave New package identifier blank, PLNTRK generates a unique identifier automatically.

- Bulk product lines create bulk inventory with the line unit of measure.
- Sellable variants create retail inventory tracked as Each.
- Sellable variant receiving must use whole-number quantities.
- A receive movement is written to the inventory audit trail.
- PLNTRK attempts to generate the inventory barcode after the new batch is saved.

Option B - Link an existing inventory package/batch

Use this when the physical inventory is already represented by an InventoryBatch in PLNTRK. Selecting the existing package links the purchasing receipt to that inventory record without adding the inventory quantity again.

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Avoid double counting

If inventory already exists because it was synced from METRC or created by another valid inventory workflow, select that existing package instead of creating another batch.

6. METRC-linked receiving

PLNTRK treats METRC-linked variants differently to avoid creating local inventory that does not match the compliance system. If the selected sellable variant is linked to a METRC item, Purchasing requires an existing synced METRC package.

Correct METRC workflow

Step	Action
1	Receive the incoming transfer/package in METRC using the normal METRC workflow.
2	Run the PLNTRK METRC inventory sync so the received package exists in PLNTRK.
3	Open the PLNTRK purchase order in Purchasing > Receiving.
4	Choose the synced METRC package from the package selector.
5	Record the receipt. Purchasing links the PO receipt to that package and does not increase inventory a second time.

METRC

Why this matters

METRC package inventory should be created or received through the METRC lifecycle first. Purchasing is the financial/operational receipt record; it should not invent a second local package for a METRC-linked item.

The receiving screen will disable the receive action for a METRC-linked line when no active synced METRC package is available. Finished METRC packages cannot be selected for a new receipt.

7. What happens after a receipt

Area	What PLNTRK updates
Purchase order line	Quantity Received increases by the posted receipt amount.
Purchase order status	Automatically recalculated: Partially Received or Received.
Receipt history	A StorePurchaseReceipt and receipt line are recorded with quantity, cost, notes, and package link.
Inventory	A new InventoryBatch and Receive movement are created only when the receiving action is supposed to create new local inventory.

Area	What PLNTRK updates
Existing package link	The PO receipt points to the selected package without increasing its quantity again.

8. Example: receiving a delivery

Example: your store orders 24 units of a 3.5 g flower variant at \$18.00 per unit. The vendor delivers 12 units today and 12 units next week.

When	What you do	Result
Create PO	Add the variant, quantity 24, unit cost \$18.00, then set the PO to Ordered.	PO appears in Receiving.
First delivery	Receive 12 units and create/link the correct inventory package.	PO becomes Partially Received. 12 remain.
Second delivery	Receive the remaining 12 units.	PO becomes Received.

NOTE	If this variant is METRC-linked Receive/sync the METRC package first, then link that synced package when recording the PLNTRK purchasing receipt.
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9. Best practices

- Keep POs in Draft until the order is actually ready to place or receive.
- Use Expected Date so the Receiving list is operationally useful.
- Use the correct product/variant on the PO instead of typing a freeform description when the item should become inventory.
- Use manual lines for freight and non-inventory costs.
- For METRC-linked products, never create a substitute local batch just to finish the PO. Receive in METRC, sync, then link.
- When an inventory package already exists, link it instead of creating duplicate inventory.
- Post partial receipts as deliveries arrive rather than waiting for the full PO if staff need accurate on-hand inventory.
- Add receiving notes for discrepancies, damaged product, substitutions, or unusual delivery circumstances.

10. Common messages and what they mean

Message / situation	What to do
Mark the purchase order as Ordered before receiving it.	Open the PO and change status from Draft to Ordered.
Only X remains to be received on this line.	Reduce the receipt quantity so it does not exceed the remaining ordered amount.
Sellable variant inventory is tracked as whole units.	Use an integer quantity such as 1, 2, 12 - not a fractional quantity.
This variant is linked to METRC... select the synced package.	Receive the package in METRC, sync PLNTRK inventory, then return to Receiving and select it.

Message / situation	What to do
No active synced package is available yet.	Run the METRC inventory sync after the METRC package has been received.
Selected inventory package belongs to a different product or variant.	Choose the package that matches the PO line exactly.
Finished METRC packages cannot be linked to new receipts.	Choose an active, unfinished package.
A purchase order cannot be cancelled after receiving has started.	Use the appropriate inventory return/adjustment workflow instead of cancelling the PO.

11. Quick reference checklist

Before receiving	Check
PO status is Ordered or Partially Received	[]
Correct vendor and PO	[]
Correct product / variant line	[]
Quantity matches what physically arrived	[]
Actual unit cost entered	[]
Existing package selected if inventory already exists	[]
METRC package received and synced first when required	[]
Notes entered for discrepancies	[]

SUMMARY

Operational rule of thumb

Purchasing answers “what did we order and receive?” Inventory answers “what do we have on hand?” METRC answers “what is the compliance package state?” PLNTRK links those records without counting the same inventory twice.

PLNTRK Store Management - Purchasing & Receiving

Use this guide as the operating reference for day-to-day purchasing and receiving.