

Flourish Implementation Guide

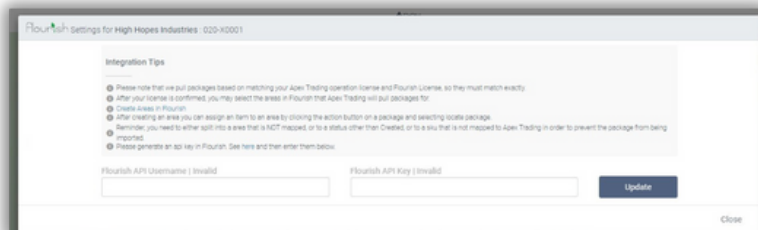
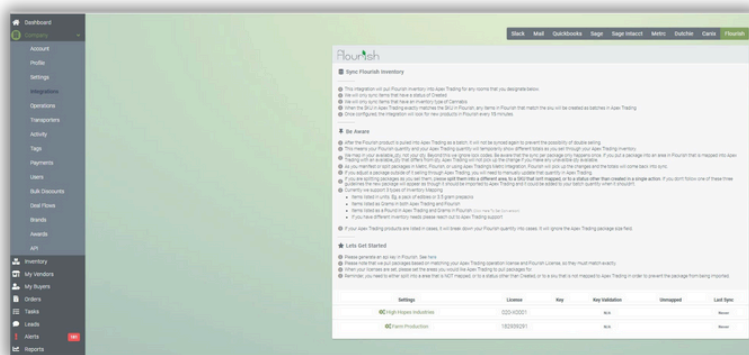
Step 1: Setting Up Flourish

- **Rooms:** If you don't already, make sure you have a specific room(s) where all wholesale packages/inventory will be moved to within Flourish. Once your room is created, move wholesale packages into it.
- **Products:** Bind the Flourish Product with the associated Apex Trading product by inputting the same SKU for each
- **API Key:** Within the Integration section of Flourish, create an API Key. This is the key you will copy and input into Apex.

Step 2: Connecting Flourish to Apex Trading

Operation Keys: Within Flourish, generate an external API Key via this link - [Flourish API Code Generator](#)

Once you receive the key(s), go to COMPANY -> INTEGRATIONS -> Flourish. Then, click on your facility name, input the key, and click "update."



- Next, select the room(s) that you want to pull inventory from Flourish into Apex Trading.

The screenshot shows the 'Flourish Settings for Cultivation 1 : C11-0001157-LIC' window. It includes an 'Integration Tips' section with five numbered instructions. Below this, there are input fields for 'Flourish API Username | Valid' (660c370f62eaf0037237996) and 'Flourish API Key | Valid' (c167fde37909fd47c5e8). A status message indicates 'Facility Matched to Operation License'. The 'Associated Areas' section shows 'Shelf 1' and 'Shelf 2' with a '+ Add' button and a 'Cancel' button. At the bottom, a sync status bar shows 'Last Sync 07/01/24, 12:15 PM' and a 'Sync Inventory' button.

Step 3: Connecting Flourish Inventory to Apex Trading Inventory

- **Inputting the Flourish SKU:** Now that we've determined the rooms and statuses, it's time to bind inventory. Go into your inventory within Apex Trading and click the edit for each product you want to bind to Flourish. On the first page, input the Flourish Product SKU and click save. Please note that the SKU must match exactly to the SKU in Flourish.

The screenshot shows the 'Editing Product: Test Cartridge' window. It has two tabs: 'Product Details' and 'Batches'. The 'Product Details' tab is active, showing various input fields for product information. A red box highlights the 'SKU' field, which contains the value 'VAPE-C-10'. Other fields include 'Product Name', 'Category', 'Default Price', 'Cartridge Type', 'Cultivar', 'Additives', 'Predominant Cannabinoid', 'Ingredients Document', 'Product Description', 'Internal Notes', 'Buyer Types', and 'Upload Product Images'. The 'Batches' tab is also visible, showing a 'Batch' field.

- Batch Creation:** Once you bind products to Flourish, the corresponding batches will then be created automatically in your Apex Trading inventory. Any packages with the same package id in Flourish will be combined as a single batch quantity in Apex. Every batch created through the integration will include all the potency, production dates, terpenes, and cannabinoids.

Inventory										
Columns ▾ Hide Filters Clear Filters										
Industry	Brand	Name	SKU	Category	Type	Quantity	Price	Cultivar	Potency	Status
		Test Cartridge	VAPE-C-10	Cartridge	Distillate	9988 US	\$15 US		22% - 27% THC	
Industry	Status	Name	Quantity	Price	Actions	Extraction Date	Potency	Operation		
W	On Deck (Add) (Use) (Revised)	COA/QRT-20230620-011	29 Flourish Managed	\$15			27% THC	Cultivation 1		
W	On Deck (Add) (Use) (Revised)	COA/QRT-20210911-001	9999 Flourish Managed	\$15			23% THC	Cultivation 1		

***Please note that we sync packages every 4 hours so you might need to head back to the integrations section and click on the facility name and then click Sync Inventory.*

Step 4: Connecting Buyers Records

- Within My Buyers: Each buyer location record displays the corresponding Flourish buyer record, which is automatically linked when the address and license information match between the two systems. If you need to change the association, click the intersecting arrows icon.
- Within the Flourish Integration section you will see a Buyer tab. This displays the locations that our bound between the two systems, which is automatically linked when the address and license information match. If you need to change the association, click on it and select the new location from the drop down.

Step 5 - Creating & Syncing Orders

- Once an order has been created or received, open it and head over to the details section.
- To generate the order in Flourish, click Sync to Flourish. This action will create a sales order and automatically deduct the corresponding inventory in Flourish.
- You can now continue with the manifest creation within Flourish.
- *Important Reminder* - do not sync the order into Flourish until it reaches a stage where it won't be changed.
 - Any changes done to the order in Flourish will not reflect back into Apex.
 - However, you can make changes to the order in Apex and Resync with Flourish if you need to.

A few other things you should be aware of or that we recommend:

- To ensure this process is followed, update your deal flow tasks to reflect this new process.
- Don't forget that your Inventory in Apex will auto-deduct as orders are either placed or created
- To ensure that inventory remains accurate between Flourish & Apex Trading, it's important that your team does the following:
 - Only sync orders into Flourish once an order reaches a stage where it isn't going to change
 - When packaging orders, it's critical that your fulfillment team pulls from the exact batch noted on the order and nothing else. If they pull from a different batch the inventory reflected in Apex will not match Flourish.

What happens to inventory in Apex Trading & Flourish as orders and manifests are created?

As you receive, create, or update orders within Apex, the available inventory will deduct accordingly keeping what is displayed to buyers and your team accurate. However, the quantity shown in Flourish will only be deducted once you create a manifest.

Be Aware of these Rules

- After the Flourish product is pulled into Apex as a batch, it will not be synced again to prevent the possibility of double selling. This means your Flourish quantity and your Apex Trading quantity will temporarily show different totals as you sell through your Apex Trading inventory.
- As you manifest or split packages in Metrc, Flourish or using Apex Trading's Metrc Integration, Flourish will pick up the changes & the totals will come back into sync.
- If you adjust a package outside of it selling through Apex Trading, you will need to manually update that quantity in Apex Trading.
- If you are splitting packages as you sell them, please split them into a different room or to a new package status. Splitting into the same room, even momentarily, will make it appear as a new product to Apex Trading and it could be added to your batch quantity when it shouldn't.

Currently we support 3 types of Inventory Mapping

- ✓ Items listed in units. Eg, a pack of edibles or 3.5 gram prepacks
- ✓ Items listed as Grams in both Apex Trading and Flourish
- ✓ Items listed as a Pound in Apex Trading and Grams in Flourish (Set Conversion)
- ✓ If you have different inventory needs please reach out to Apex Trading support