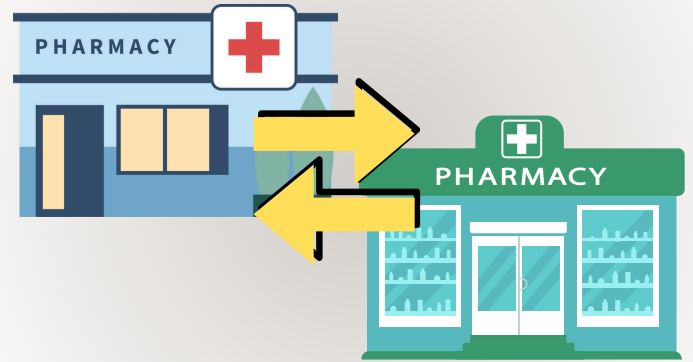


Creating A Transaction

Lending & borrowing is not allowed under DSCSA. A transfer of ownership must occur which includes the products DSCSA data. InfiniTrak provides simple tools to create incoming & outgoing transactions.



TYPES OF TRANSACTIONS

There are two types of transactions:

Incoming transactions can be used when the pharmacy receives product without electronic data such as pharmacy to pharmacy or from a supplier portal when the pharmacy wants to keep all the data in a single location.

Outgoing transactions are used to send product from your pharmacy to another entity that is not commonly held such as a neighboring pharmacy.

For the most part, creating the transactions are similar. There are a few differences which are noted.

All transactions must include Transaction Information & a Transaction Statement.

Transaction Information consists of shipping and product details such as address, NDC, description, and more.

Transaction Statement is a written attestation stating the Trading Partner is transferring ownership of the product and has complied with all DSCSA regulations.

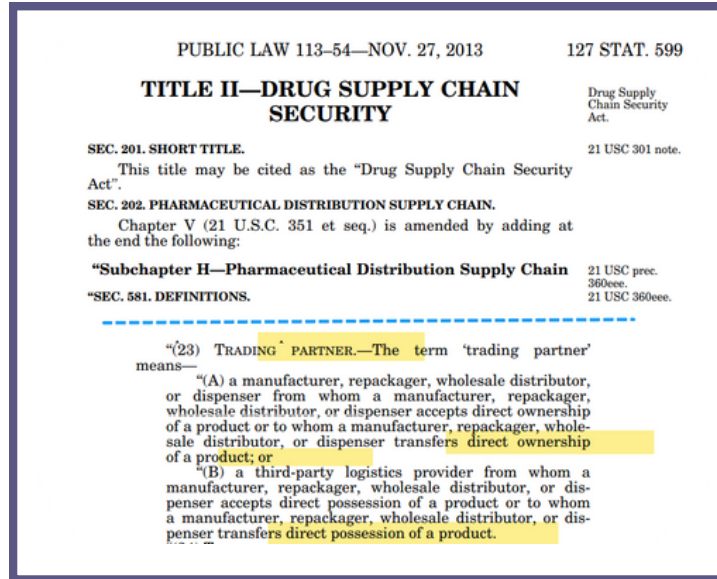
When both pharmacies are on the InfiniTrak platform, the data transfer is seamless.

Check out the Video Tutorial



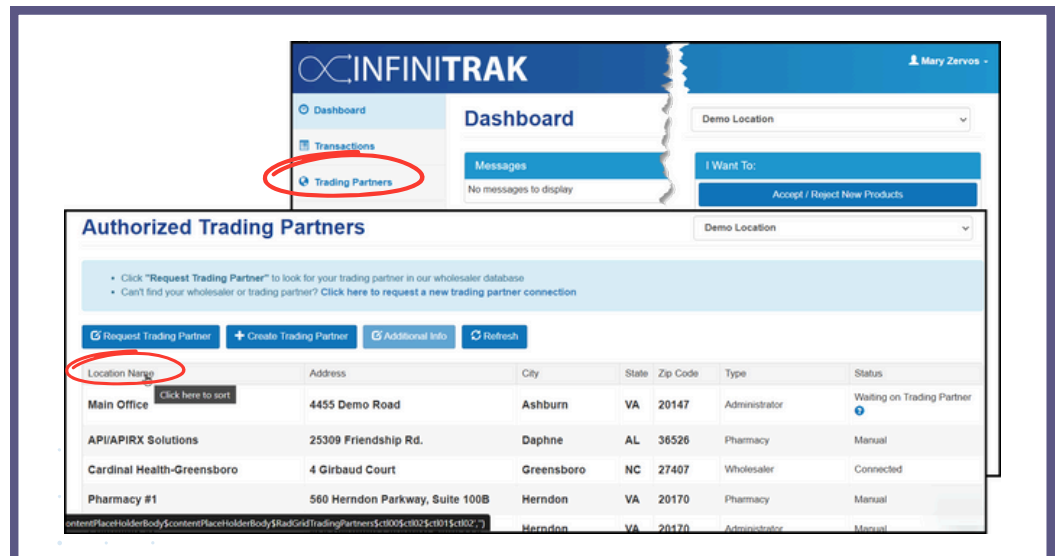
IDENTIFYING A TRADING PARTNER

According to the FDA and the Drug Supply Chain Security Act, a Trading Partner is any entity within the supply chain that exchanges ownership of a product (FDA.gov).



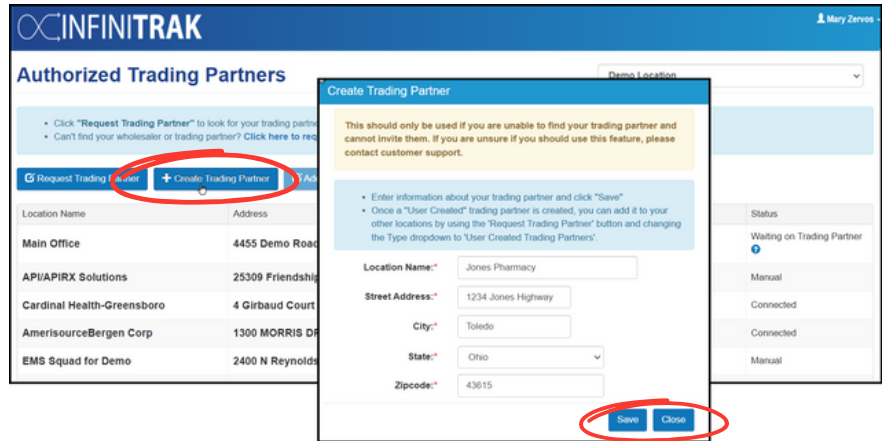
LOCATE OR CREATE THE TRADING PARTNER

- 1 The first step to create a transaction is to check the pharmacy’s list of Authorized Trading Partners. From the Dashboard, select ‘Trading Partners’.
- 2 Search the list of Trading Partners to locate the entity. To make the search easier, click on the table headers to alphabetize the list by name, address, and so forth.



③ If the Trading Partner is not listed, the user can add it –

For **Outgoing Transactions** – Only use the '+Create Trading Partner' button. These are typically not system to system connections.



Authorized Trading Partners

Click "Request Trading Partner" to look for your trading partner.
Can't find your wholesaler or trading partner? Click here to request support.

Location Name	Address
Main Office	4455 Demo Road
API/PIRX Solutions	25309 Friendship
Cardinal Health-Greensboro	4 Girbaud Court
AmerisourceBergen Corp	1300 MORRIS DR
EMS Squad for Demo	2400 N Reynolds

Create Trading Partner

This should only be used if you are unable to find your trading partner and cannot invite them. If you are unsure if you should use this feature, please contact customer support.

Enter information about your trading partner and click "Save".
Once a "User Created" trading partner is created, you can add it to your other locations by using the "Request Trading Partner" button and changing the Type dropdown to "User Created Trading Partners".

Location Name: Jones Pharmacy
Street Address: 1234 Jones Highway
City: Toledo
State: Ohio
Zipcode: 43615

Save Close

For steps on how to Request a Trading Partner Connection, [click HERE](#)

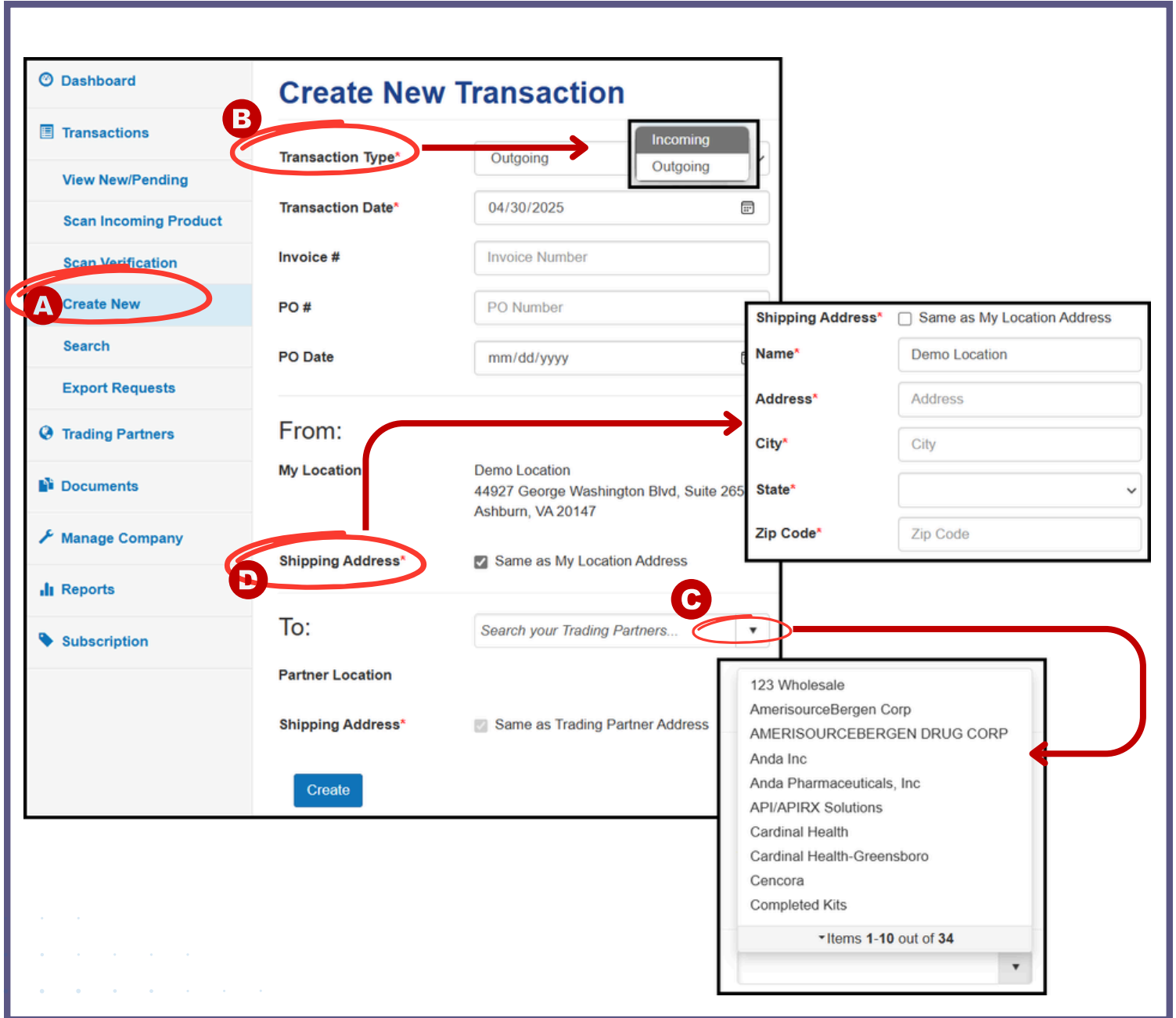
For **Incoming Transactions** – From a pharmacy or portal, use the '+Create Trading Partner' button. If the incoming transaction is from a new supplier that has not been connected yet, use the '+Request Trading Partner' button. This will send our team a notice to establish this connection for future transactions.

CREATE THE TRANSACTION

Now that the Trading Partner has been located, create the transaction.

- ① From the dashboard, select 'Transactions' then 'Create New'.
- ② Select the 'Transaction Type' – 'Incoming' or 'Outgoing'. Enter the PO & invoice numbers and the PO date.
- ③ Scroll down to the address section:
 - Incoming Transaction** – the 'To' is your pharmacy's information and the 'From' is the Trading Partner who sent the product.
 - Outgoing Transaction** – the 'To' is the Trading Partner receiving the product and the 'From' is your pharmacy's information.

If the 'Seller' or 'Buyer' address is different from the 'Ship to' or 'Ship From' you can uncheck the 'Shipping Address' and enter the correct shipping address.



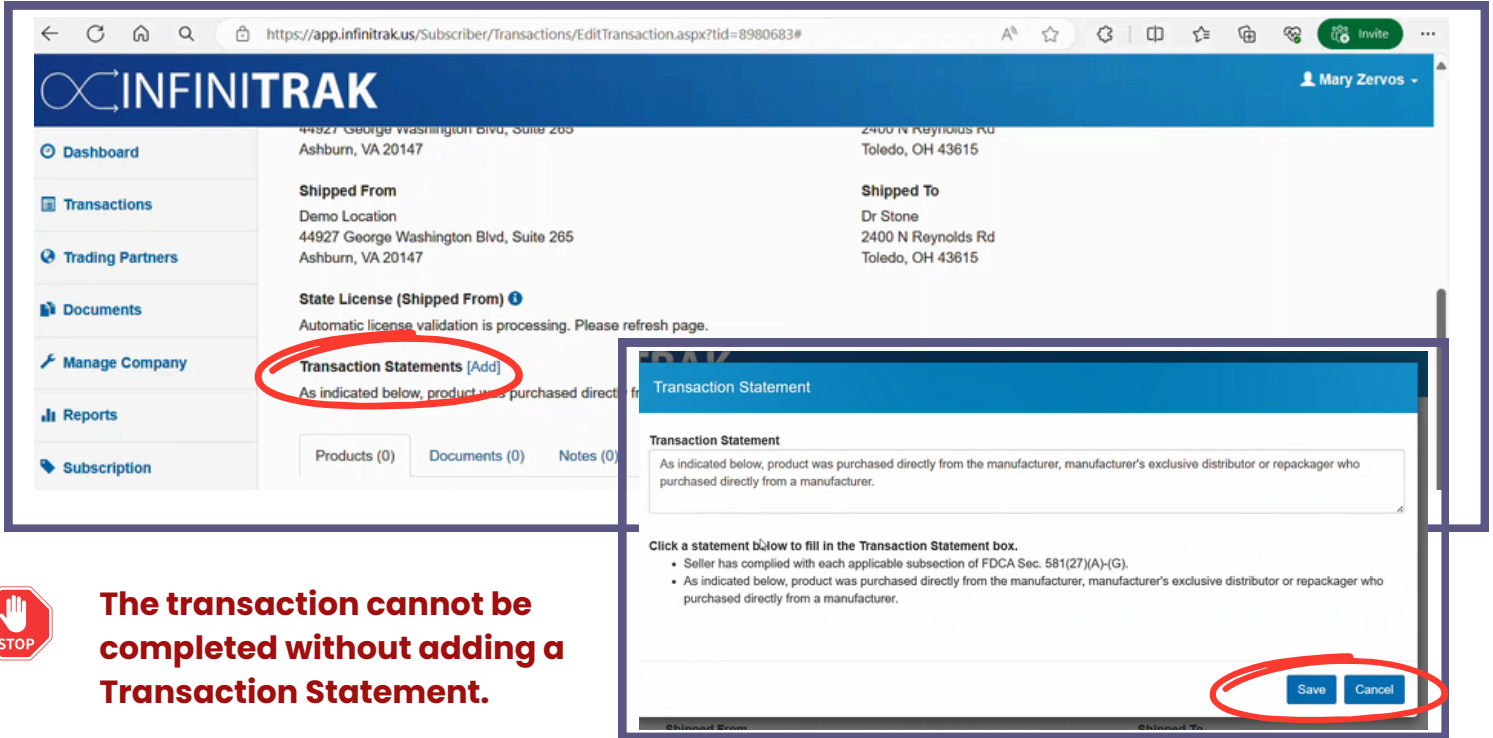
The screenshot shows the 'Create New Transaction' form. Annotations highlight key features:

- A**: 'Create New' button in the left sidebar.
- B**: 'Transaction Type*' dropdown menu, currently set to 'Incoming'.
- C**: 'To:' dropdown menu for selecting a trading partner.
- D**: 'Shipping Address*' checkbox, which is checked.

The form includes the following fields and sections:

- Transaction Type***: Incoming (selected), Outgoing.
- Transaction Date***: 04/30/2025.
- Invoice #**: Invoice Number.
- PO #**: PO Number.
- PO Date**: mm/dd/yyyy.
- From:**
 - My Location**: Demo Location, 44927 George Washington Blvd, Suite 265, Ashburn, VA 20147.
 - Shipping Address***: ☒ Same as My Location Address.
- To:**
 - Partner Location**: Search your Trading Partners...
 - Shipping Address***: ☒ Same as Trading Partner Address.
- Shipping Address*** (popup form):
 - ☐ Same as My Location Address
 - Name***: Demo Location
 - Address***: Address
 - City***: City
 - State***: [Dropdown]
 - Zip Code***: Zip Code
- Trading Partner List** (popup):
 - 123 Wholesale
 - AmerisourceBergen Corp
 - AMERISOURCEBERGEN DRUG CORP
 - Anda Inc
 - Anda Pharmaceuticals, Inc
 - API/APIRX Solutions
 - Cardinal Health
 - Cardinal Health-Greensboro
 - Cencora
 - Completed Kits
 - Items 1-10 out of 34

- 4 Select 'Create' to go to the Transaction Details page. Next, add the Transaction Statement. In the middle of the page, select 'Add' then choose a Transaction Statement or type one in the box and select 'Save'.



Transaction Statement

As indicated below, product was purchased directly from the manufacturer, manufacturer's exclusive distributor or repackager who purchased directly from a manufacturer.

Click a statement below to fill in the Transaction Statement box.

- Seller has complied with each applicable subsection of FDCA Sec. 581(27)(A)-(G).
- As indicated below, product was purchased directly from the manufacturer, manufacturer's exclusive distributor or repackager who purchased directly from a manufacturer.

Save **Cancel**



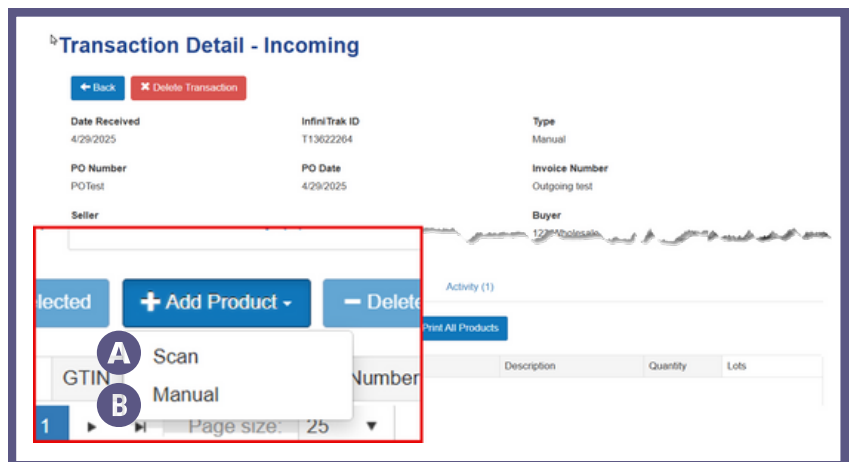
The transaction cannot be completed without adding a Transaction Statement.

ADDING THE PRODUCT INFORMATION

- 1 Scroll down to the Product section:

Incoming Transaction –

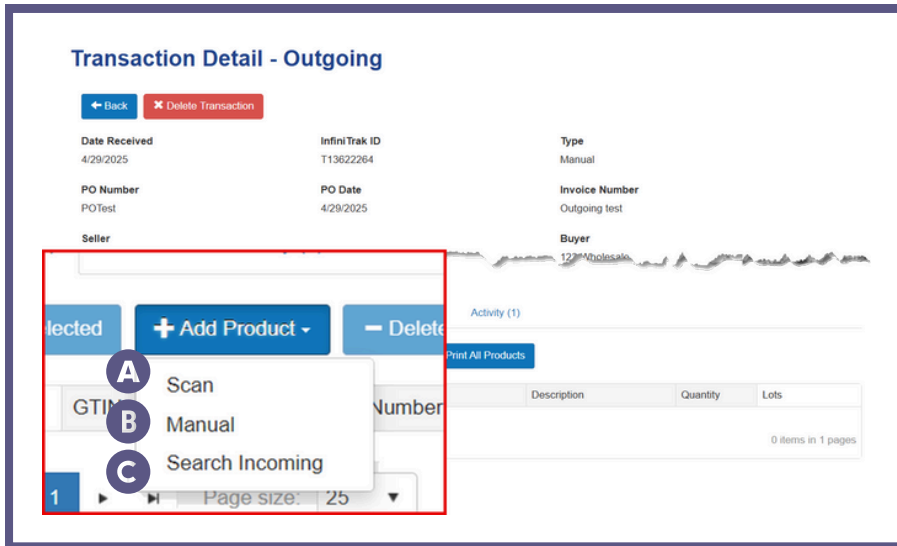
There are 2 options to add product to an incoming transaction – Scan and Manual. Select the '+Add Product' button and choose from the drop-down list.



Transaction Detail - Incoming

+ Add Product **- Delete**

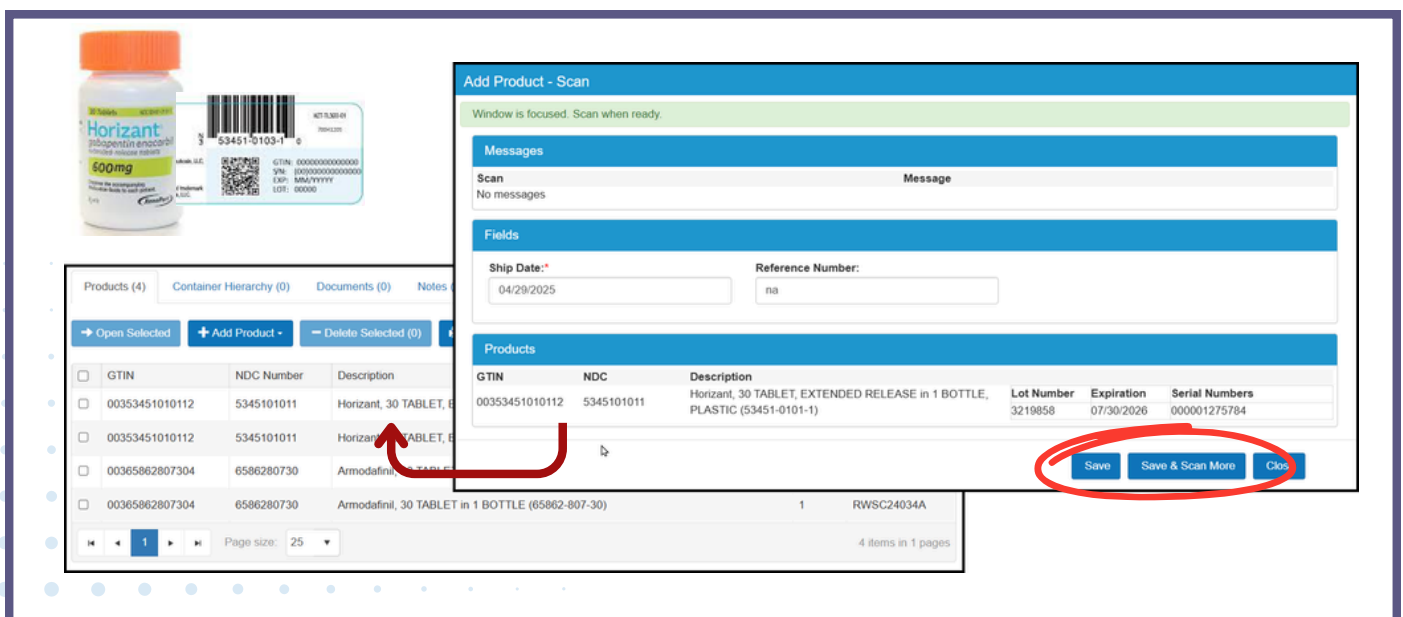
Scan **Manual**



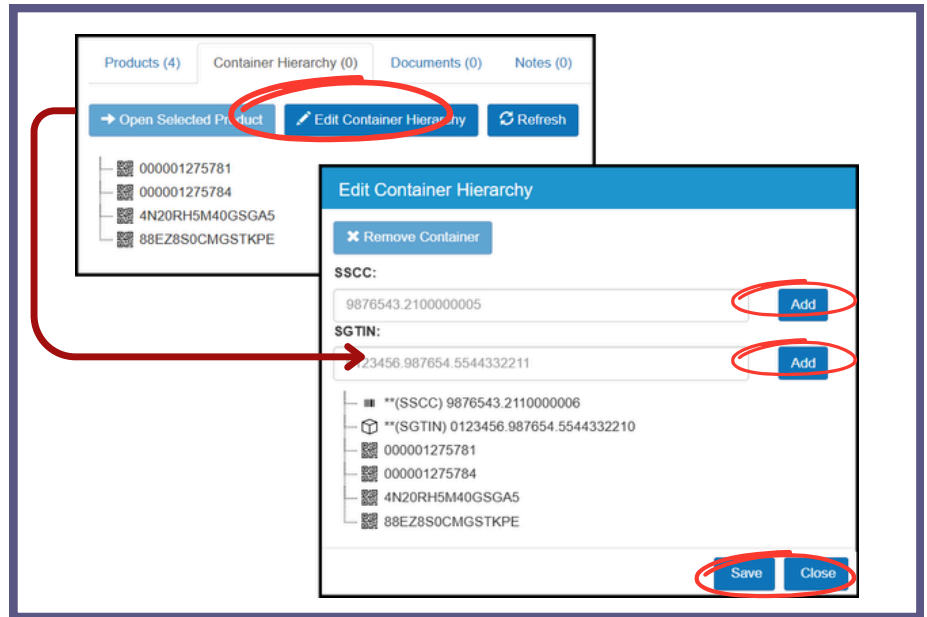
Outgoing Transaction -

There are 3 options to add product to an outgoing transaction - Scan, Manual, and Search Incoming. Select the '+Add Product' button and choose from the drop-down list.

- A** Using 'Scan' to add product allows the user to scan the individual product to add the information to the transaction. With the cursor on the 'Add Product - Scan' screen, scan the 2D barcode on the product. Enter the ship date. If that is the only one to add, select 'Save' otherwise add consecutive products by using 'Save & Scan More'.



Scanning populates all the product information into the product detail page, including GTIN and serial number. The user can also add a ssc or sgtin for container hierarchy if applicable. This typically only applies to wholesalers sending totes of products and is not used by dispensers.



Products (4) Container Hierarchy (0) Documents (0) Notes (0)

Open Selected Product Edit Container Hierarchy Refresh

000001275781
000001275784
4N20RH5M40GSGA5
88EZ8S0CMGSTKPE

Edit Container Hierarchy

Remove Container

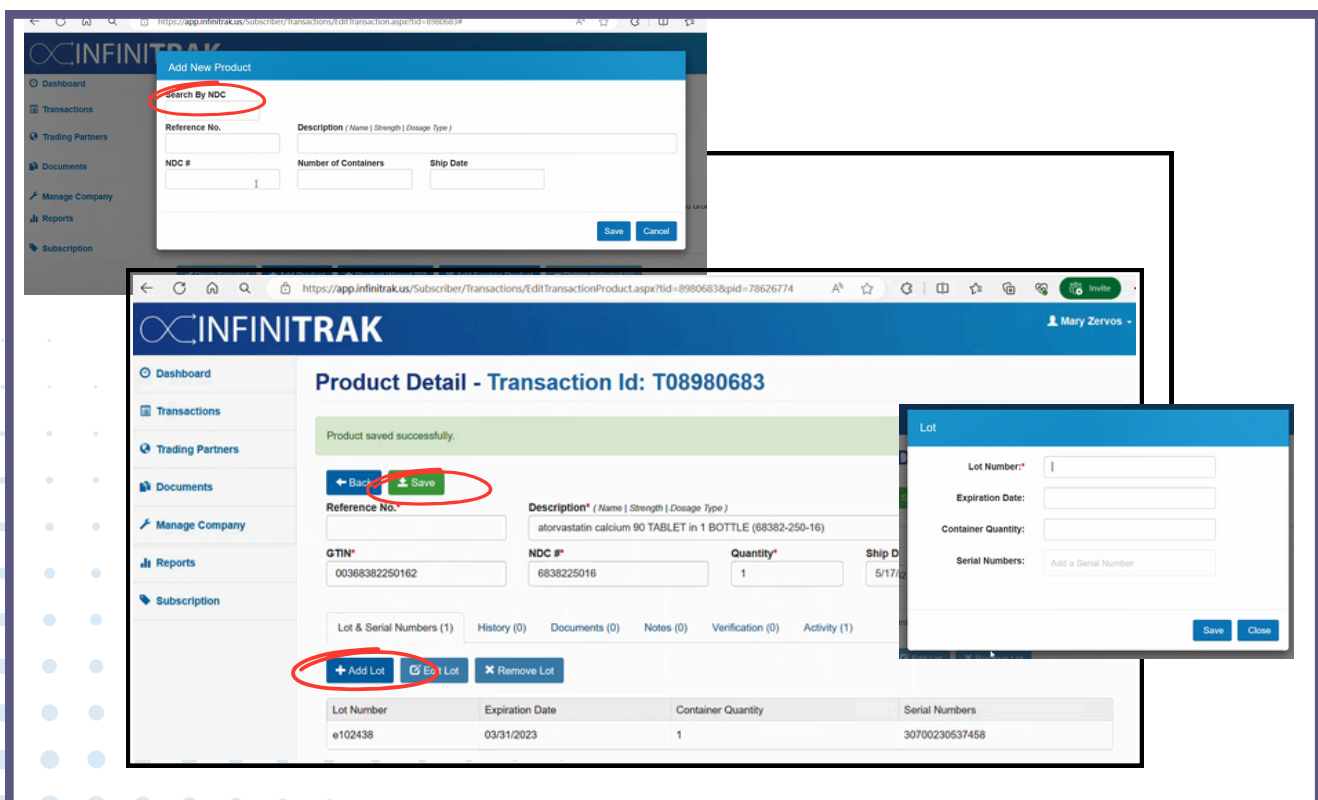
SSCC: 9876543.210000005 Add

SGTIN: 0123456.987654.5544332211 Add

*(SSCC) 9876543.210000005
*(SGTIN) 0123456.987654.5544332210
000001275781
000001275784
4N20RH5M40GSGA5
88EZ8S0CMGSTKPE

Save Close

- B** Using 'Manual' to add product requires the user type in the product details. Enter the NDC in the 'Search By NDC' box and select the correct description. Then enter the quantity and ship date before selecting 'Save & Go to Product'. From the 'Product Detail' page the user can add the GTIN, Lot, Expiration, and Serial Numbers. After each serial number, select the return key until all serial numbers have been added. When finished, select 'Save'.



Add New Product

Search By NDC

Reference No. Description (Name | Strength | Dosage Type)

NDC # Number of Containers Ship Date

Save Cancel

Product Detail - Transaction Id: T08980683

Product saved successfully.

Back Save

Reference No. Description* (Name | Strength | Dosage Type)

GTIN* NDC* Quantity* Ship Date

0036832250162 6838225016 1 5/17/2023

Lot & Serial Numbers (1) History (0) Documents (0) Notes (0) Verification (0) Activity (1)

Add Lot Edit Lot Remove Lot

Lot Number Expiration Date Container Quantity Serial Numbers

e102438 03/31/2023 1 30700230537458

Lot

Lot Number*

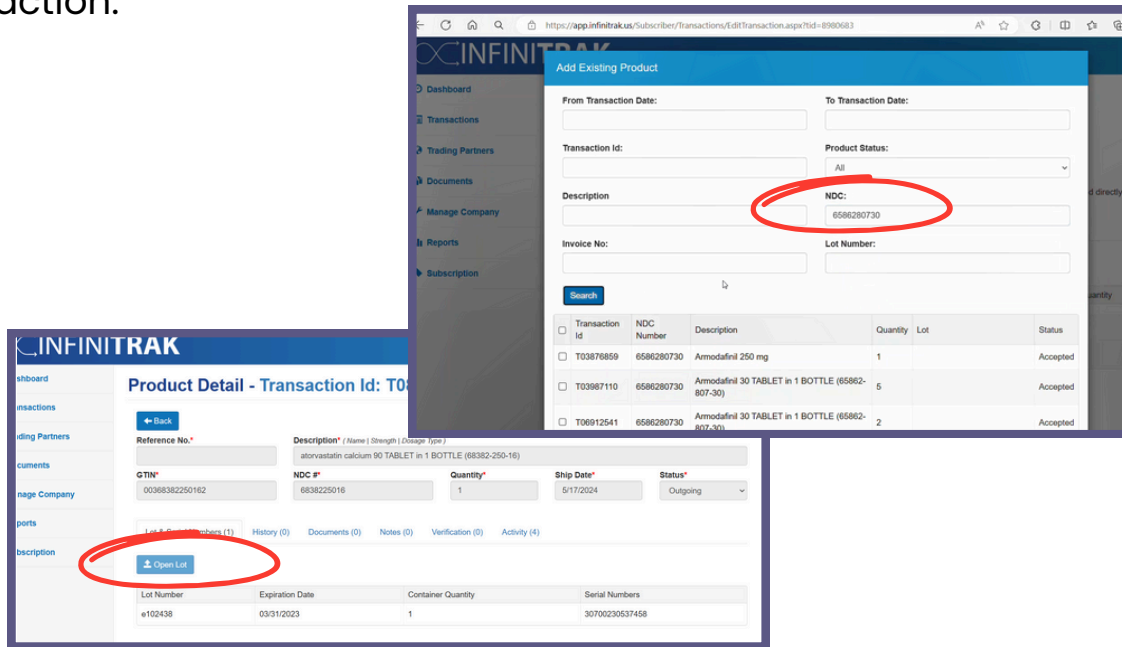
Expiration Date:

Container Quantity:

Serial Numbers: Add a Serial Number

Save Close

- C For Outgoing Transactions Only** - Use 'Search Incoming' to use data from product already in the system to populate the new transaction. Choose a parameter to search by such as NDC, select 'Search'. Locate the product and 'Add Selected' then 'Close'. Next, go to the product detail page to update the quantity. Add the serial number or delete any unused serial numbers. Save the product detail page and return to the transaction.

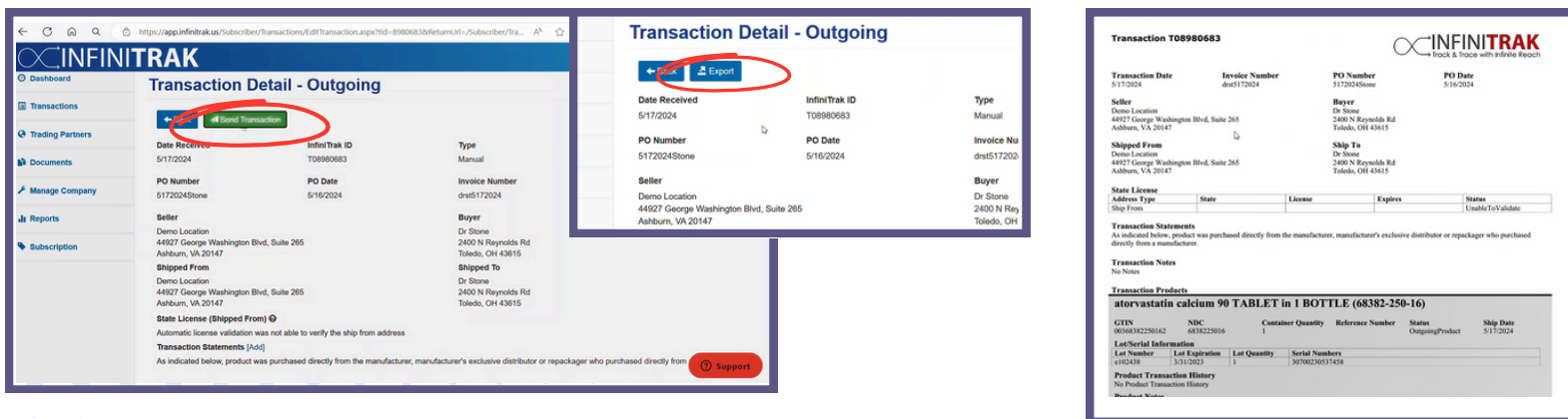


The first screenshot shows the 'Add Existing Product' dialog box. The 'NDC' field is highlighted with a red circle and contains the value '6586280730'. The 'Search' button is also visible.

The second screenshot shows the 'Product Detail - Transaction Id: T0980683' page. The 'Open Link' button is highlighted with a red circle. Below it, a table lists product details:

Lot Number	Expiration Date	Container Quantity	Serial Numbers
e102438	03/31/2023	1	30700230537458

- 3** Review the completed transaction.
- Incoming Transactions** - the pharmacy needs to accept the product and close the transaction.
- Outgoing Transactions** - If the recipient is an InfiniTrak customer, select 'Send Transaction'. Otherwise, export the transaction to print and send with the product or to send via email.



The first screenshot shows the 'Transaction Detail - Outgoing' page. The 'Send Transaction' button is highlighted with a red circle. Below it, a table lists transaction details:

Date Received	InfiniTrak ID	Type
5/17/2024	T0980683	Manual

The second screenshot shows the 'Transaction T0980683' printout. The 'Export' button is highlighted with a red circle. Below it, a table lists transaction details:

Date Received	InfiniTrak ID	Type
5/17/2024	T0980683	Manual

The third screenshot shows the 'Transaction T0980683' printout. It includes a table for 'Transaction Products' and a table for 'Transaction Products'.

GTIN	NDC	Container Quantity	Reference Number	Status	Ship Date
00368382250162	6838225016	1		Outgoing/Product	5/17/2024