

Bulletin Number: CA-IB-2024-003	Distribution Date: 10/23/2024	Effective Date: 10/22/2024						
Contact Point: Metrc Support	Contact Point: Metrc Support Subject: Optional Invoice Number on Transfer Manifest							
<b>Reason:</b> To introduce a new fea Number on transfer manifests.	ture that allows licensees to op	tionally include an Invoice						

Greetings,

On 10/22/2024 Metrc was updated to allow licensees to optionally include an *Invoice Number* on transfer manifests.

This enhancement is described in detail on the following pages.



# **Optional Invoice Number on Transfer**

When creating or editing a transfer, a new optional *Invoice Number* field displays on the action window - **see Figure 1**.

New Licensed	Transfer		×
Destination 1	Type part of the License Number. <b>Q</b> (clear)	Туре	- Select -
Planned Route		Invoice Number	Enter the Invoice Number
		<u>Est.</u> Departure	■ 10/17/2024
	h	<u>Est.</u> Arrival	■ 10/17/2024

Figure 1: Invoice Number Field in New Licensed Transfer Action Window

An entry in the *Invoice Number* field is **NOT** required, but it can optionally be used by origin licensees that find it helpful to include this information on the transfer/transfer manifest.



The *Invoice Number* field can be viewed by the <u>origin</u> licensee in the manifest drill-down on the *Outgoing* tab on the *Licensed Transfers* grid - **see Figure 2**.

icensed Transfe	rs		1					
New Transfer View Manifest								
Incoming (1/1) Inactive	Dutgoing Rejected Inac	ctive						
Manifest	Destination			Stops			Pkg's	
0000157401 💋	C12-0000002-LIC (Lily's Micro Grow)			1			1	
Destinations Transporter D	etails Notes History							
Destination	InvNbr : Type :	Packages	ETD		ATR	: 1	ATA	ATA
C12-0000002-LIC Lily's Micro Grow	12345 Transfer	1	10/17/ 01:00	2024 pm			10/17/2024 )1:33 pm	
Page 1	of 1 () () 20 ()	rows per page						

Figure 2: Invoice Number Field on Outgoing Tab Drilldown

The *Invoice Number* field can be viewed by the <u>destination</u> licensee on the *Incoming* tab of the *Licensed Transfers* grid - **see Figure 3**.

sfer View N	Manifest							
g (2/5) Inac	ctive   Ou	tgoing (10/14) Rejec	ted (3) Ina	active				
anifest :	Inv. Nbr :	Origin :	Туре :	Pkg's :	ETD :	ATR :	ETA :	ATA
00157401 💋	12345	C12-2020615-LIC Cultivation Microbusiness	Transfer	1	10/17/2024 01:00 pm		10/17/2024 01:33 pm	
1 Pag	ge 1 of 1	► ► 20	<ul> <li>rows per</li> </ul>	r page				
	inifest : 0157401 Ø Pa	10157401     Page     1     of 1	(2/5)       Inactive       Outgoing (10/14)       Reject         unifest       InxNbr       Origin       :         0157401       12345       C12-2020615-LIC Cultivation Microbusiness         1       Page       1       of 1       >       20	(2/5)     Inactive     Outgoing (10/14)     Rejected (3)     Inactive       Inifest     Initial I	Inactive     Outgoing (10/14)     Rejected (3)     Inactive       Inifest     Initiation     Initiation     Initiation       Initiation     Initia	Inactive       Outgoing (10/14)       Rejected (3)       Inactive         Inifest       InvNbr       Image: Origin       Image: Type       Image: Pkg's       Image: ETD       Image: Origin         0157401       12345       C12-2020615-LIC Cultivation Microbusiness       Transfer       1       10/17/2024 01:00 pm         1       Page       1       of 1       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Page       1       of 1       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Page       1       of 1       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Page       1       of 1       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Page       1       of 1       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Page       1       of 1       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Page       1       of 1       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Image: Pkg's       Image: Pkg's       Image: Pkg's       Image: Pkg's       Image: Pkg's       Image: Pkg's         1       Image: Pkg's <td< td=""><td>(2/5)       Inactive       Outgoing (10/14)       Rejected (3)       Inactive         Inifest       Inix.Nbr       Imactive       Origin       Imactive         0157401       Imactive       Imactive       Imactive         1       12345       Imactive       Imactive         1       Page       1       Imactive       Imactive         1       Page       1       Imactive       Imactive</td><td>(12)       Inactive       Outgoing (10/14)       Rejected (3)       Inactive         Inifest       :       Inv. Nbr       :       Origin       :       Type       :       ELD       :       ATD       :       ELA       :         0157401       12345       C12-2020615-LIC Cutivation Microbusiness       Transfer       1       10/17/2024 01:00 pm       10/17/2024 01:33 pm         1       Page       1       of 1       Imactive       Imactive</td></td<>	(2/5)       Inactive       Outgoing (10/14)       Rejected (3)       Inactive         Inifest       Inix.Nbr       Imactive       Origin       Imactive         0157401       Imactive       Imactive       Imactive         1       12345       Imactive       Imactive         1       Page       1       Imactive       Imactive         1       Page       1       Imactive       Imactive	(12)       Inactive       Outgoing (10/14)       Rejected (3)       Inactive         Inifest       :       Inv. Nbr       :       Origin       :       Type       :       ELD       :       ATD       :       ELA       :         0157401       12345       C12-2020615-LIC Cutivation Microbusiness       Transfer       1       10/17/2024 01:00 pm       10/17/2024 01:33 pm         1       Page       1       of 1       Imactive       Imactive

Figure 3: Invoice Number Field on Incoming Tab



## **Invoice Number on Transfer Manifest**

The new *Invoice Number* field also displays when viewing or printing a manifest. It will be populated with a value only if the origin licensee opted to include this information when creating or editing the transfer.

An example of the new *Invoice Number* field on the transfer manifest is shown below - **see Figure 4**.

CANNABIS TRANSPORTATION MANIFEST							
All sales transactions are to be completed prior to transportation of any cannabis. The receiving entity may reject product delivered, but amount delivered must be limited to amount agreed upon in prior sales transaction.							
Manifest No.	0000157401	Date Created	10/1	7/2024 12:46 PM			
Originating Entity	Cultivation Microbusiness		Fo	r Agency Use Only			
Originating License Number	C12-2020615-LIC						
Address of Originating Entity	201 Micron Drive Suite 937 Monterey, CA 95379 County: Monterey APN: 21934930289800						
Phone No. of Originating Entity	831-818-2200						
1. Destination	Lily's Micro Grow	Destination Phone No	).	5308412700			
Invoice Number	12345						
Destination License Number	C12-0000002-LIC	Date and Approx. Time of Dep	parture	10/17/2024 1:00 PM			

Figure 4: Invoice Number on Transfer Manifest



### Metrc resources

If you have any questions, or need additional support, the following resources are available:

**Contact Metrc Support** by using the new full-service system – Service Cloud – by navigating to <u>Support.Metrc.com</u>, or from the Metrc System, click the Support area dropdown on the navigational toolbar and click support.metrc.com to redirect to the portal.

*Please note*: If accessing the portal for the first time, a username (which is established when logging in), the respective state and "Facility license number", and a valid email to set a password are required.

**Metrc Learn:** Metrc Learn was recently redesigned to offer interactive educational opportunities to enhance Metrc system users' skills and provide various training options based on experience level.

In addition, the learning system is organized into facility-specific programs made up of various courses. To login or register for an account, visit <u>Metrc Learn</u>.

Access additional resources: In the Metrc system, click on the Support area on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more from the dropdown.

Thank you for your continued partnership.