

Bulletin Number: MN_IB_0028	Distribution Date: 10/10/2024	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Transfers Best Practices	
Reason: To outline best practices for creating and receiving Transfer Manifests.		

Greetings,

To ensure accuracy and efficiency with Transfers, we are providing best practice guidance around system functionality to help reduce preventable errors that may result in locked product and time required for Metrc Support case resolution.

Please read on for additional information.

Outgoing Transfers

When creating a Transfer Manifest in Metrc, it is important to double check each package that is being added to the manifest. Some common errors made when creating a transfer manifest include:

- Incorrect package placed on manifest
- Incorrect package quantity
- Incorrect wholesale price
- Incorrect item name or category
- Packages physically left off transfer manifest

The example below highlights a few key areas on the manifest that the list above references – **see Figure 1**.

1. Destination	MN - Manufacturer	Destination Phone No.	555-555-5558
Destination License Number	M0001	Date and Approx. Time of Departure	9/18/2024 12:26 PM
Address of Destination	34 Twin Ln Minneapolis, MN 55101	Date and Approx. Time of Arrival	9/18/2024 1:26 PM
		Date/Time Received	
		Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.)	
Route to be Traveled Down the street and around the corner.			
1. Outbound Transporter	MN - Cultivator	No Layover Scheduled	
Transporter License Number	C0001		
Address of Transporter	1 Vikings Ave Minneapolis, MN 55101		
Contact Phone No. for Inquiries: 1-234-567-8900			
Name of Person Transporting	Roger Higgins	Employee ID of Driver	X00420
State Driver's License No.	BR549	Signature of Person Transporting	
Make, Model, License Plate No.	Chevy Van Go B4IGO	Leg of Layover Trip	
1. Package Shipped	Production Batch No.	Item Name	Quantity
1A4FF01000000CC000000113 Lab Test: TestPassed		Uncanna Blue (Bud/Flower - 0345)	Shp: 200 g
Item Details	Strain: Blue Wgt: 3.5 g		

Figure 1: Transfer Manifest

Prior to leaving the originating facility, it is beneficial to ensure:

- Packages are created properly – correct item, quantity, package tag numbers.
- The price listed on the transfer, if applicable, is correct.
- The correct packages are listed on the transfer and are all physically packed/present.
- There are no sales associated with any of the included packages.
 - If a sale has been completed for a package and the sale needs to be edited but the package has been transferred, the ability to edit the sale would not be available.
 - Packages with sales should never be transferred out of the facility that completed the sale. If the remaining product in a package needs to be transferred, the remaining quantity should be repackaged onto a new package tag and the new package should be transferred to the other facility.

Reminder: Once packages are placed on a transfer manifest, they will no longer be visible within the Active Packages grid in Metrc. To view which packages are on a Manifest, or ones that have previously been transferred, refer to the “In Transit” or the “Transferred” tab of the Packages grid – **see Figure 2.**

The difference between the two tabs are as follows:

- **In Transit** - This tab displays the package(s) that are currently on a transfer manifest and have not been received by the receiving facility.
- **Transferred:** This tab displays the package(s) that have been transferred out of the facility and are currently in the inventory of another licensed facility.

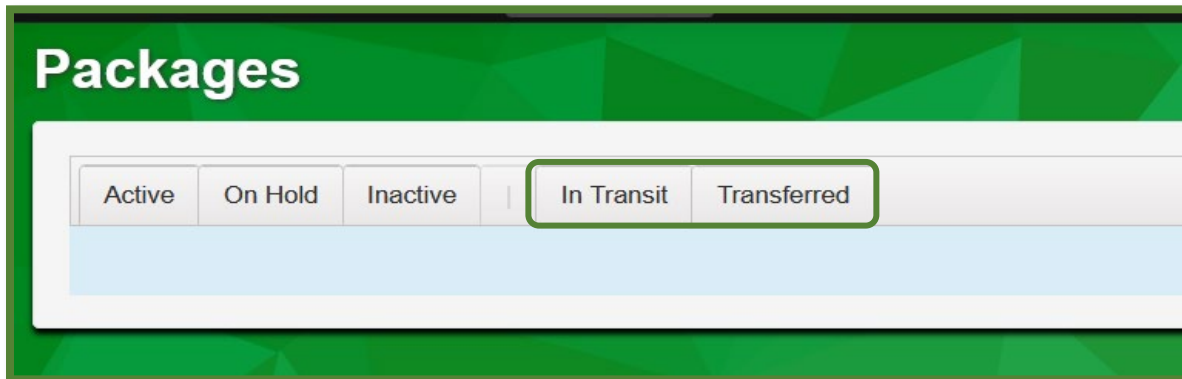


Figure 2: In Transit and Transferred Tab in the Packages Grid

Available Transfer Types

Below is a list of transfer types that are available to use when creating a licensed transfer within Metrc:

- **Affiliated Transfer:** Used when transferring to an affiliated business under the same ownership.
- **Lab Transfer:** Used when transferring a test sample to a Testing Facility.
- **Unaffiliated Transfer:** Used when transferring to a license outside of the same ownership.
- **Waste Transfer:** Used when transferring waste to the waste facility.

Transfer Templates

Transfer templates are a great option for those who transfer to the same licenses regularly. Here, transfer templates can be created and saved for transfers to a specific license.

To create a Transfer Template, access the Transfers area on the navigational toolbar and select the Templates option from the drop down. Once on the Licensed Transfers Templates grid, select the New Template button – **see Figure 3.**

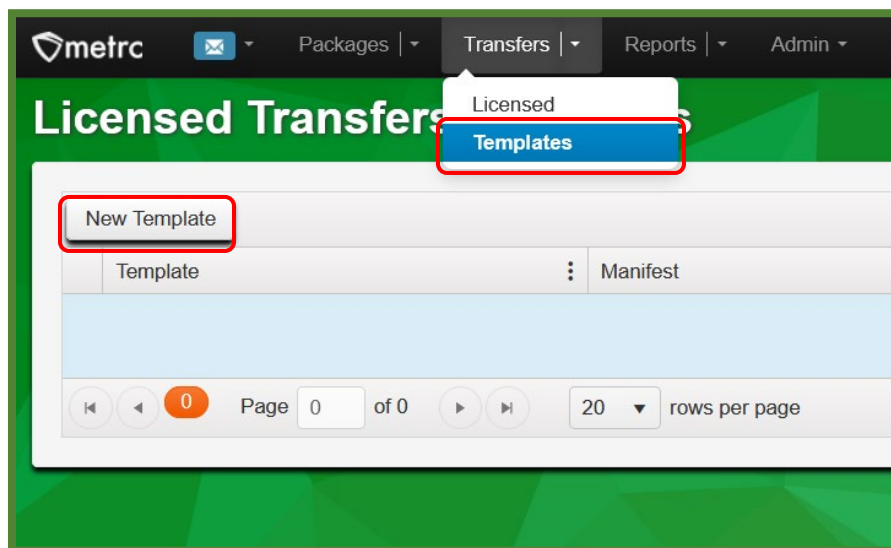


Figure 3: Transfer Templates

The Transfer Template should be completed with the license number, planned route, type of transfer, and driver information filled in, for use when needed. When using a preexisting transfer template, only the packages and ETD (“Estimated Time of Delivery”) and ETA (“Estimated Time of Arrival”) need to be completed. Multiple templates can be created and edited as needed.

Please note: Creating and editing transfer templates is available through the Metrc API, but creating the transfer will need to be completed within the Metrc system.

Vehicle/Driver Data & Quick Entry

Metrc is constantly working to increase efficiency and ease of use within the system. There are two ways to access functionality:

1. Ability to save commonly used transporter information

The ability to save commonly used transportation vehicles and drivers’ information is helpful so that this information does not need to be manually entered each time a transfer manifest is created.

To add drivers or vehicles, access the Admin area on the navigational toolbar, select the Transporters option from the drop down, then click the Drivers or Vehicles tab – see **Figure 4**.

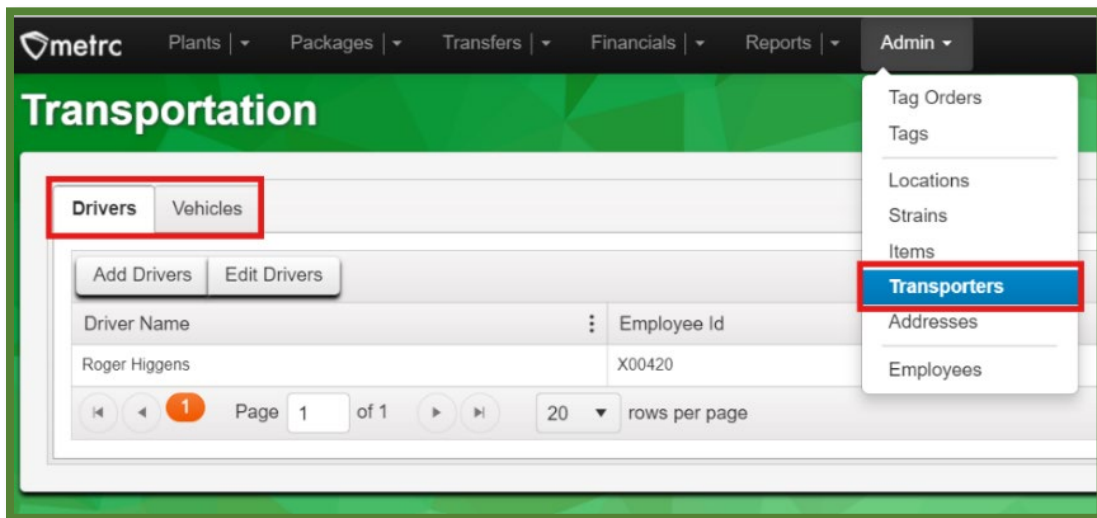


Figure 4: Driver and Vehicle Data Entry

2. Quick Entry and CSV Upload

Additional efficiencies for creating transfer manifests include the use of the Quick Entry and CSV Upload features.

- **Quick Entry** - This feature allows for a barcode scanner to be used to add packages to a manifest in Metrc. More information regarding this functionality can be found in [Minnesota Bulletin 13](#). When using this feature, be sure that the Quick Entry is toggled “On” for the manifest. If it reads as “Off”, simply click the “Off” button so that it toggles to “On” – **see Figure 5**.

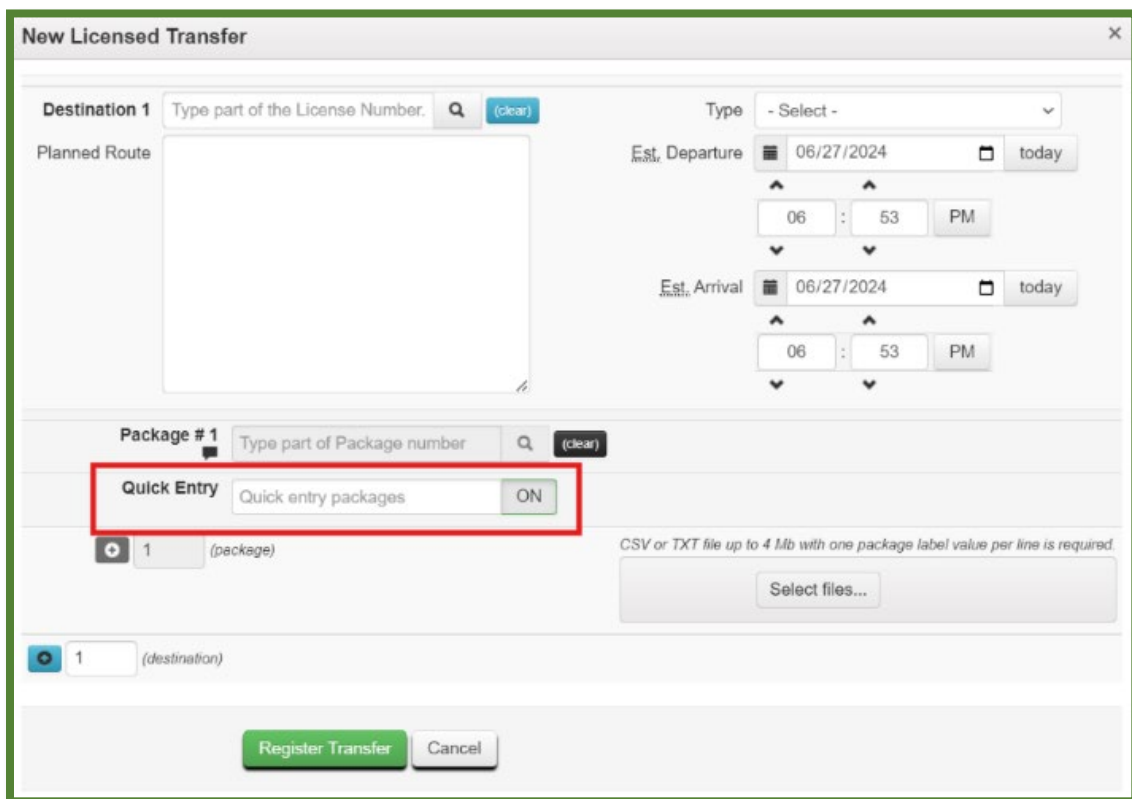
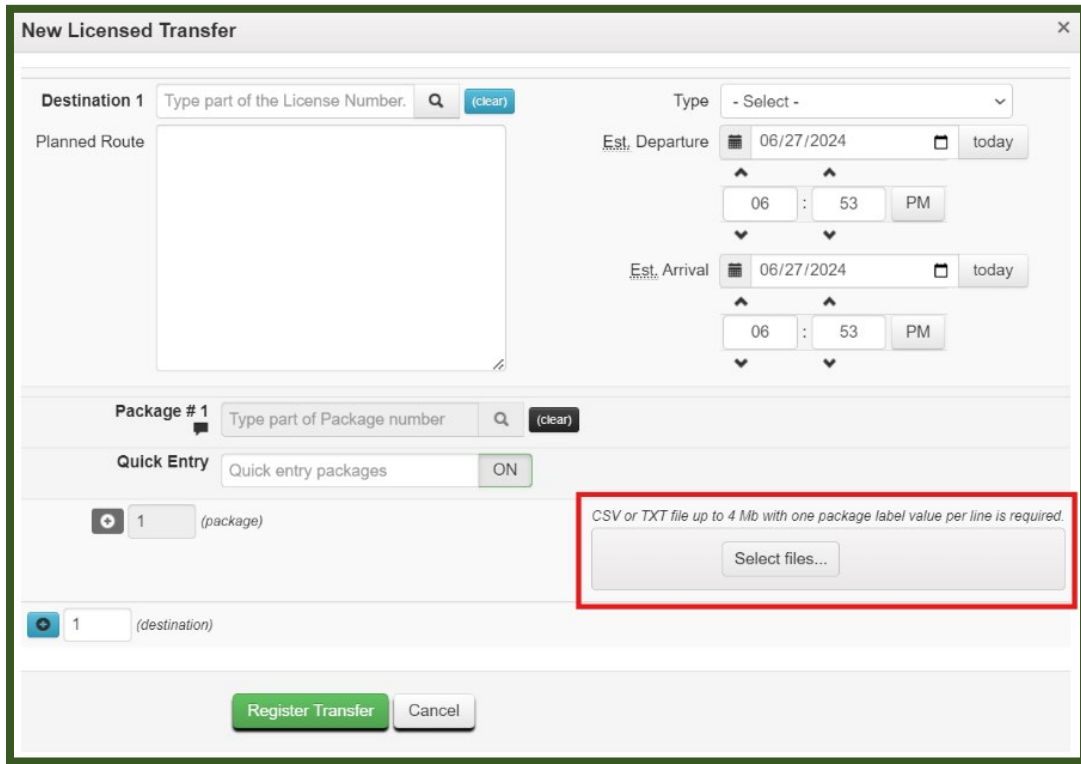


Figure 5: Quick Entry functionality

- **CSV Upload** - This functionality offers the ability to upload a simple CSV file to add packages to the manifest, as well as the package weight and price for wholesale manifests – see **Figure 6**.



The screenshot shows a web form titled "New Licensed Transfer". It includes several input fields: "Destination 1" with a search icon and a "(clear)" button; "Planned Route" as a large empty text area; "Type" as a dropdown menu; "Est. Departure" and "Est. Arrival" as date and time pickers, both set to "06/27/2024" at "06:53 PM"; "Package # 1" with a search icon and a "(clear)" button; "Quick Entry" with a text input and an "ON" button; a file upload field with a plus icon, the number "1", and the text "(package)"; and a "destination" field with a plus icon and the number "1". A red box highlights the file upload area, which contains the text "CSV or TXT file up to 4 Mb with one package label value per line is required." and a "Select files..." button. At the bottom, there are "Register Transfer" and "Cancel" buttons.

Figure 6: CSV Upload to add packages to a transfer manifest

Receiving Transfers

When accepting a transfer in Metrc, some commonly observed errors include:

- Issues relating to the originating manifest that went unnoticed or ignored.
- Receiving different quantities than what was shipped.
- Receiving transfers in Metrc when intending to reject the transfer.

To prevent these types of errors, the following is recommended:

- All packages should be thoroughly inspected and weighed/counted prior to the transport driver departing the facility.
- If possible, leverage another employee to dually verify accuracy prior to accepting transfers.
- Always receive the transfer in Metrc prior to the transporter leaving the facility. This will ensure that, should any issues be found, the packages can be rejected both physically and in Metrc without delay.
- As soon as a new transfer manifest is generated in Metrc, that manifest is visible to the destination license.
 - It is strongly recommended that the destination license view this manifest data in Metrc and confirm that everything looks correct.
 - **Please note:** This does not remove the need to check the physical product upon arrival, however, it does allow for some mistakes to be corrected prior to shipping, such as testing errors, item errors, or electronic quantity issues.
- Ensure accuracy of Lab Testing – **see Figures 7 and 8 below.**
 - When viewing the “Lab Test Batches” tab within the package details, please check that only lab test batches appropriate for that package category are present. For example, a package of concentrates should not have Lab Test Batch data for Raw Plant Material. If the Test Batch data is not correct, the package should be rejected so that it can be returned physically to the shipper and in Metrc so it can be corrected by the sending facility.

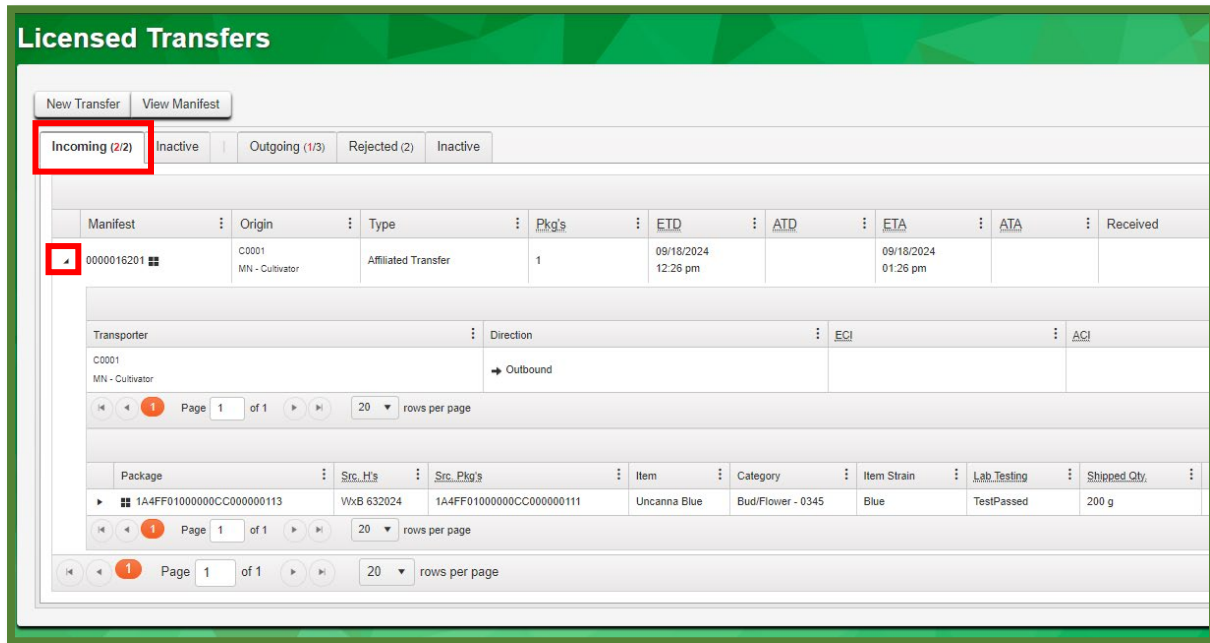


Figure 7: Navigate to a Specific Package on an Incoming Transfer Manifest

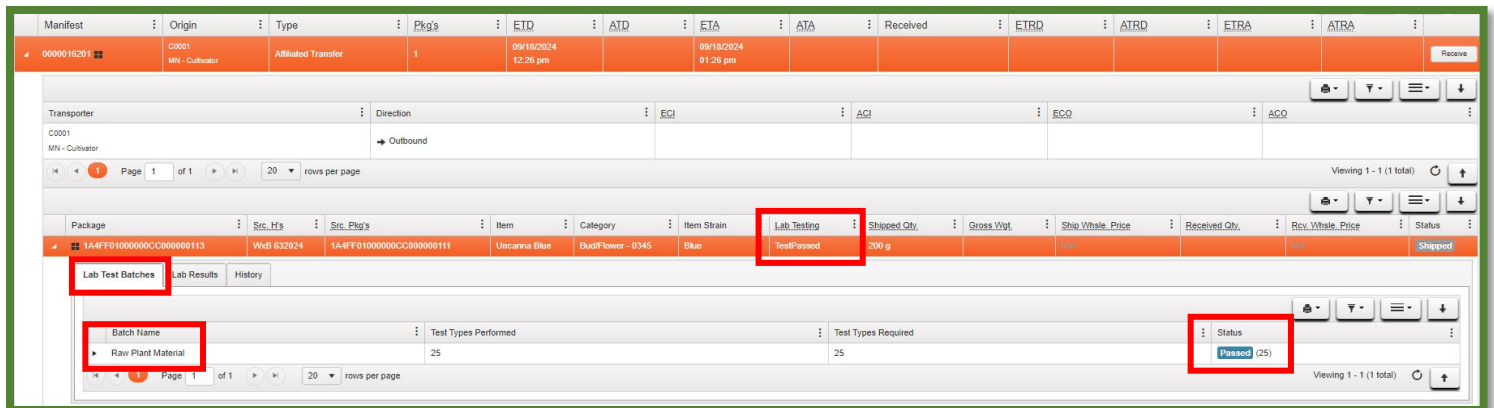


Figure 8: View Test Results of a Package on the Incoming Transfer Manifest

Packages should not be received at a quantity different than was shipped. If there is a difference in quantity of a package, that package should be rejected so that it can be returned, corrected, and reshipped. When a package is received with a quantity different than when it was shipped, that additional product does not go back to the origin license's inventory.

When rejecting a transfer, remember to check the “Reject” box to the right of the Shipped Qty. package being rejected before clicking the Receive button on the transfer – see **Figure 9**. There is no way to undo the accidental acceptance of a package.

Manifest	0000016201	Transfer Type	Affiliated Transfer
Origin Lic. No.	C0001	Origin Name	MN - Cultivator
Main Phone No.	555-555-5555	Mobile Phone No.	
Transporter Lic. No.	C0001	Transporter Name	MN - Cultivator
Phone No. for Questions	1-234-567-8900		
Employee ID	X00420	Vehicle Make	Chevy
Driver's Name	Roger Higgins	Vehicle Model	Van Go
Driver's Lic. No.	BR549	License Plate	B41GO
Package # 1	1A4FF01000000CC000000113	Item	Uncanna Blue
Location	Type part of the Location name...	Shipped Qty.	200 g <input type="checkbox"/> Reject
		Receive Qty.	150 Grams

Receive Transfer Cancel

Figure 9: Reject checkbox and Received Quantity field

Please note: Should an error be noticed on the manifest prior to receiving but after the product has left the origin facility, it is strongly recommended to reject the incorrect package(s) as opposed to having the manifest edited. If a transfer manifest is being edited and received at the same time, the product will no longer exist in either the origin or destination license.

Once a Transfer Manifest is received in Metrc, the PDF of the transfer (found by clicking the View Manifest button within the incoming and/or outgoing Transfers grids in Metrc) will update to a status of accepted packages (highlighted in green) or rejected packages (highlighted in pink) – see **Figures 10 and 11**.

1. Package Rejected	Production Batch No.	Item Name	Quantity
1A4FF0100000071000000023 Lab Test: NotRequired		White Widow Moms (Wet Whole Plants (each))	Shp: 3 ea GWT: 2.0000 g
Item Details		Strain: White Widow	
Reject Reason: Tampered Package		Rejection Note: No thank you	

Figure 10: Received package on PDF copy of manifest

1. Package Accepted	Production Batch No.	Item Name	Quantity
1A4FF0300000068000000053 Lab Test: TestPassed		Ford's Fire (Buds)	Shp: 98 g Rcv: 98.0000 g GWT: 48.0000 g
Item Details		Strain: Ford's Fire	
Source Harvest		Ford's Fire 04.22.24 HB	

Figure 11: Rejected package on PDF copy of manifest

Please note: When a package is rejected, the driver’s copy of the manifest should be notated as such, and the product returned to the origin facility with the driver. When the product is physically returned to the origin facility, that facility should bring the product back into their inventory by navigating to the Rejected tab in the Transfers area to receive that product back into their license – see **Figure 12**.

Figure 12: Receiving a Rejected Transfer

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 [Support.Metrc.com](https://support.metrc.com), 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 [Metrc Learn](#).

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.