

Metric Experience Scenario

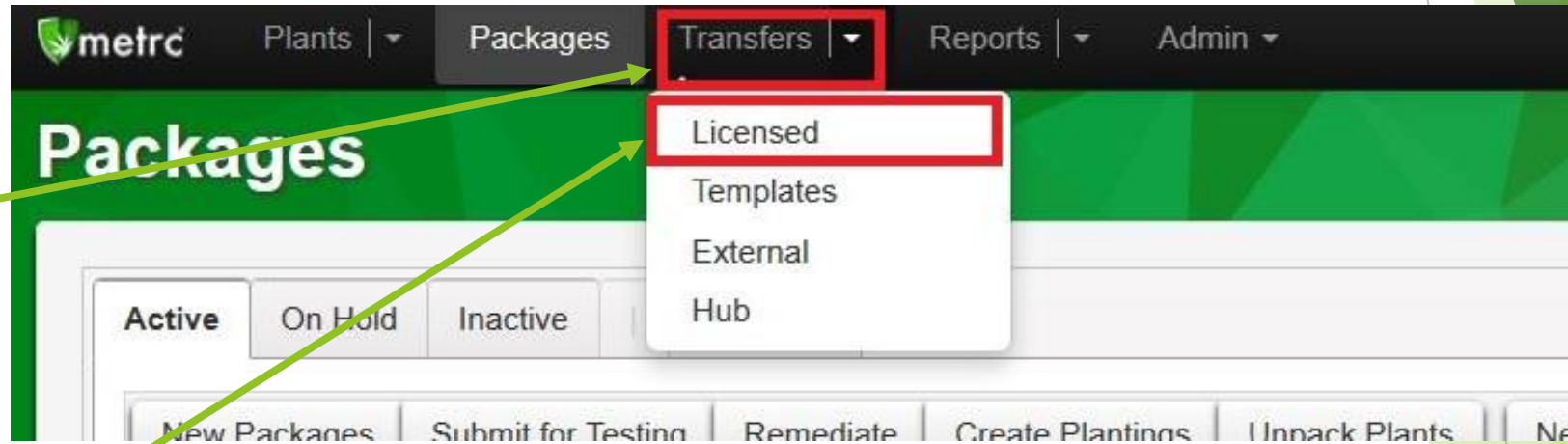
Creating A Transfer, Receiving and Rejecting Packages on a Transfer

Introduction

- ▶ Welcome to the Metrc Experience Transfers Scenario for Oregon. The goal of this scenario is to walk you through how to create an outgoing transfer manifest to another licensed facility.
- ▶ Additionally, this scenario will walk you through how to accept and reject individual packages on a manifest, and how to receive rejected packages back into your inventory once rejected.
- ▶ Note: This scenario is not a substitution for reading and understanding the applicable laws, rules, and regulations related to the legal operation of your recreational marijuana facility or facilities. Make sure that you read and understand the rules and are properly trained prior to performing any function in your facility's Metrc account.

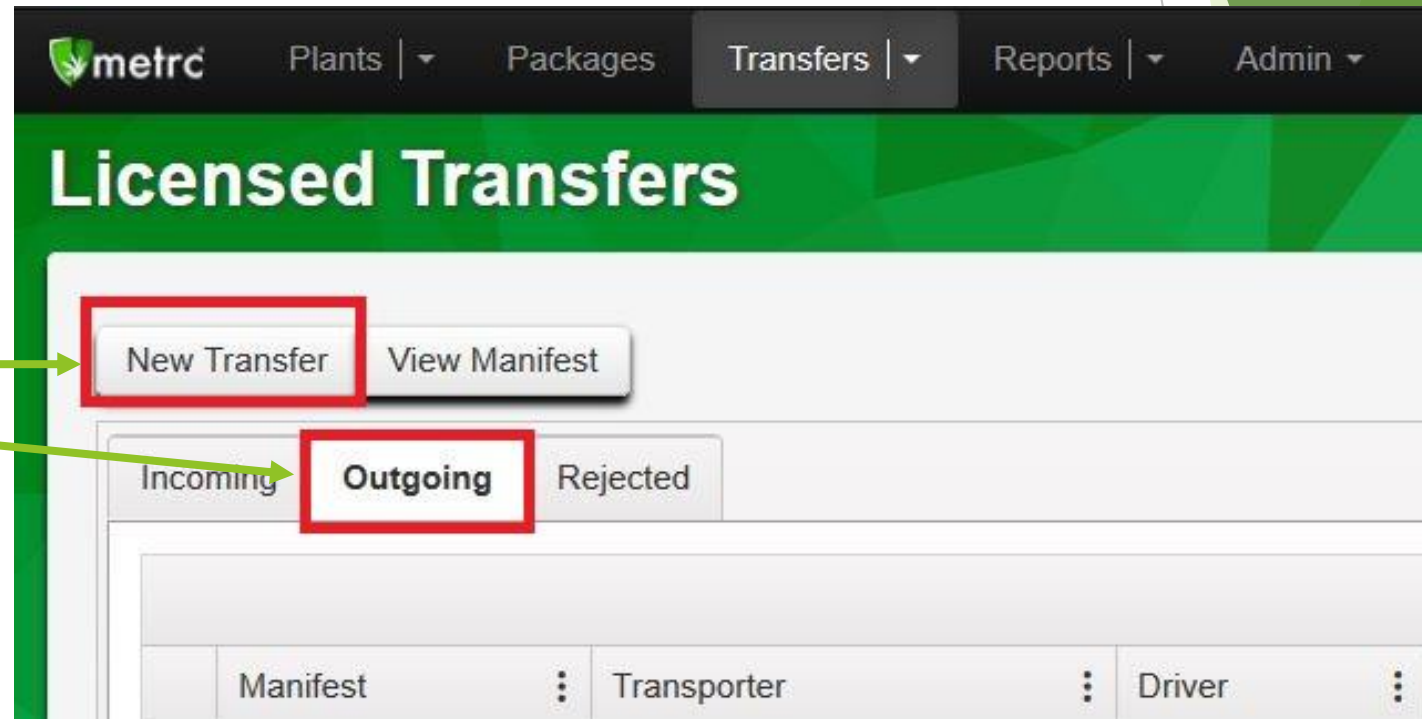
Step 1: Navigate to the Transfers Section

- ▶ By default you should be in the producer license when you first log in.
- ▶ Click on the Transfers button on the top of the page.
 - ▶ A drop down menu will appear. Click on “Licensed”.



Step 2: Generate a New Transfer Manifest

- ▶ When the transfers page loads, you will see three tabs load:
 - ▶ Incoming
 - ▶ Outgoing
 - ▶ Rejected
- ▶ Click on the Outgoing Tab
 - ▶ Then click on the “New Transfer” Button.



Step 3: Select the Transfer Type

- ▶ The pop up window will ask for a transfer “type”.
- ▶ In Oregon we use two different types of transfers: Wholesale Transfers or Standard Transfers.
 - ▶ The difference is this:
 - ▶ Standard Transfers: Used between facilities that are under the same ownership structure, where no money is exchanging hands.
 - ▶ Wholesale Transfers: Used between unrelated facilities, where money is being exchanged for the product.
- ▶ In this scenario, we will keep it simple and select “transfer” as the transfer type.

The screenshot shows a web application window titled "New Licensed Transfer". It contains several input fields and buttons. A red rectangular box highlights the "Type" dropdown menu, which currently shows "- Select -". A green arrow points from the text "select transfer type" in the list to this dropdown. Other visible elements include:

- Destination 1:** A search bar with the placeholder "Type part of the License Number." and a "clear" button.
- Planned Route:** A large empty text area.
- Est. Departure:** A date and time selector showing "10/09/2020" and "12 : 47 PM".
- Est. Arrival:** A date and time selector showing "10/09/2020" and "12 : 47 PM".
- Package # 1:** A search bar with the placeholder "Type part of Package number..." and a "clear" button.
- Package List:** A list with one item "1 (package)" and a "Select files..." button.
- Destination List:** A list with one item "(destination)" and a "Select files..." button.
- Buttons:** "Register Transfer" (green) and "Cancel" (grey) at the bottom.

Step 4: Fill in the Driver, Recipient, and Route Details

- ▶ After selecting the transfer type, the window will change slightly.
 - ▶ Fill in the areas for the driver and vehicle information.
 - ▶ Select the recipient license number by typing in the license number for the retail location in the demo software. You can do this by clicking on the search glass icon or by beginning to type the license number in the destination section.
 - ▶ Fill in the planned route information and the Departure and Arrival times for the manifest.
- ▶ When typing in this information, use the information you would likely use when generating an actual manifest, so as to get used to filling in this information correctly.

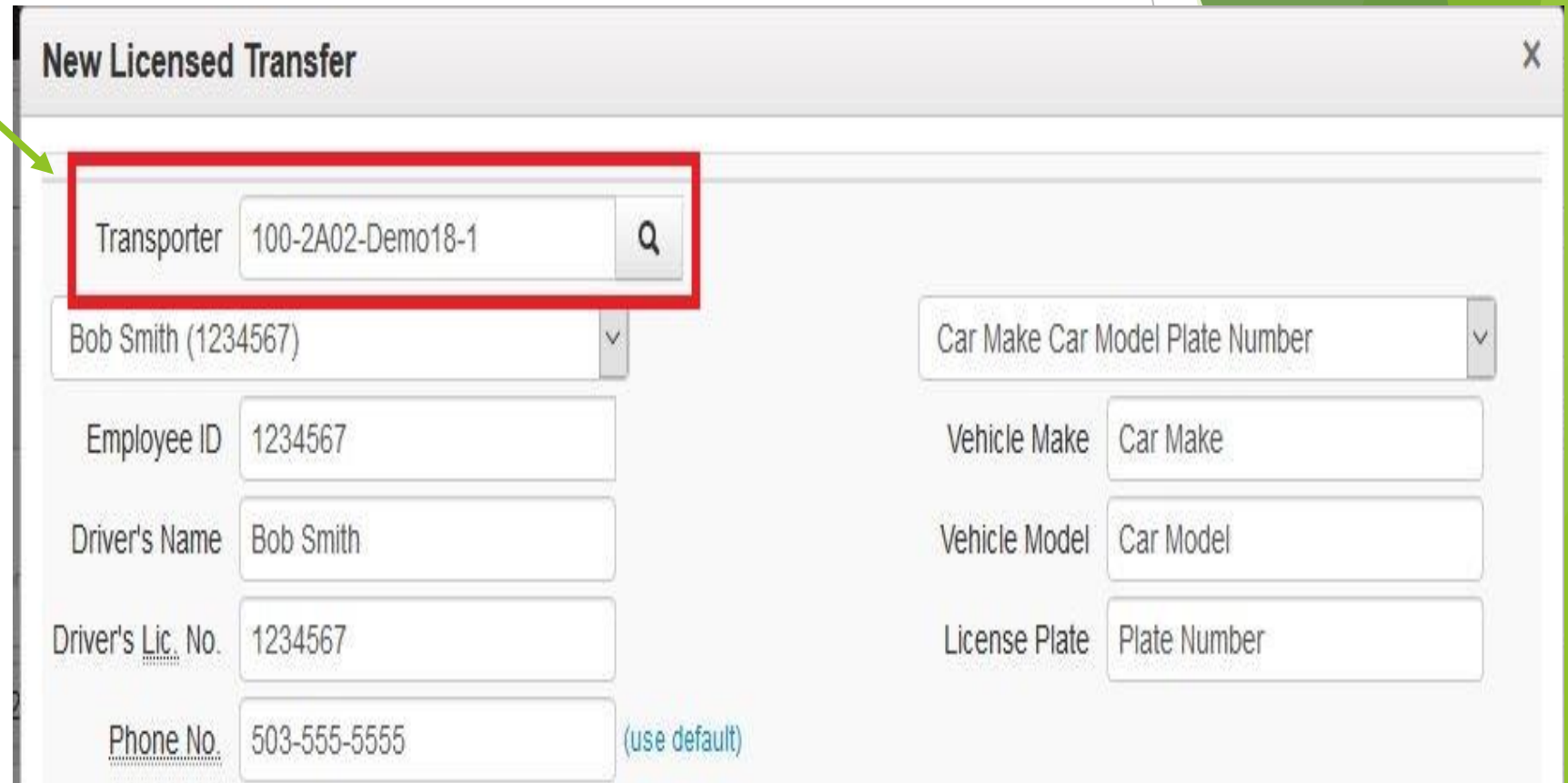
The screenshot shows a web application window titled "New Licensed Transfer". It contains several input fields and sections:

- Transporter:** A dropdown menu showing "100-2A02-Demo18-1".
- Driver Information:** A section containing fields for "Employee ID" (1234567), "Driver's Name" (Bob Smith), "Driver's Lic. No." (1234567), and "Phone No." (503-555-5555). A red box highlights this entire section.
- Vehicle Information:** A section containing fields for "Car Make", "Car Model", and "Plate Number". A red box highlights this section.
- Destination 1:** A section containing a "Planned Route" text area with the text "Left on 1st street", "Right on A Street", "Arrive at Retailer", "123 Anywhere Lane", and "Somewheresville, OR 97000". A red box highlights this section.
- Timing:** A section containing "Est. Departure" and "Est. Arrival" date and time pickers, both set to "10/09/2020" and "12:47 PM". A red box highlights this section.
- Package # 1:** A section containing a "Type" dropdown menu set to "Transfer", a "Package number" input field, and a "Select files..." button.
- Buttons:** "Register Transfer" and "Cancel" buttons at the bottom.

Green arrows point from the text in the list to the corresponding red boxes in the screenshot.

A note on the “Transporter” field

- ▶ When generating a manifest in Metrc, the Transporter field represents the license number that the driver is representing during the transport of the marijuana items.
 - ▶ By default, the manifest sets the transporter license to the licensee that generates the outgoing manifest.
 - ▶ Whenever a different licensee is transporting the marijuana items, you should make sure to change the transporter to reflect the correct license number.
- ▶ In this case we will leave the transporter license number as it first appears.



The screenshot shows a web form titled "New Licensed Transfer". A red rectangular box highlights the "Transporter" field, which contains the text "100-2A02-Demo18-1" and a magnifying glass icon. A green arrow points from the text "Transporter field" in the first bullet point of the list to this field. Below the highlighted field, there is a dropdown menu showing "Bob Smith (1234567)". To the right of the dropdown is a search bar with the text "Car Make Car Model Plate Number". Below the dropdown are four input fields: "Employee ID" with "1234567", "Driver's Name" with "Bob Smith", "Driver's Lic. No." with "1234567", and "Phone No." with "503-555-5555". To the right of the "Phone No." field is a link that says "(use default)".

Step 5: Add packages to the Manifest

- ▶ Once all the preliminary information has been filled in, you will see “Package #1” toward the bottom of the pop-up window.
- ▶ Below it you will see a black “+” button.
 - ▶ Click on that button two (2) times, to add a “package #2” and “package #3” lines to the manifest generation.
- ▶ Once that is done, click on the search glass icon next to Package # 1

The screenshot shows a web-based interface for creating a manifest. At the top, there's a 'Destination 1' field with the value '100-2A02-Demo18-2' and a search icon. Below it is a 'Planned Route' section with text: 'Left on 1st street', 'Right on A Street', 'Arrive at Retailer', '123 Anywhere Lane', and 'Somewheresville, OR 97000'. To the right, there are 'Est. Departure' and 'Est. Arrival' fields, both set to '10/09/2020' and '12:47 PM'. Below these, there are three rows for packages, each with a label (Package # 1, # 2, # 3), a search input field, and a search icon. A red box highlights the search icons for Package # 1, # 2, and # 3. Below the package rows, there is a section with a black '+' button, a dropdown menu showing '2', and a label '(package)'. A red box highlights this section. At the bottom right, there is a 'Select files...' button. Green arrows point from the text in the list to the corresponding elements in the interface: one to the 'Package #1' label, one to the '+' button, one to the search icon for Package # 1, and one to the search icon for Package # 2.

Step 5 (continued): Add Packages to the Manifest

- ▶ Select a package from the options presented by highlighting the package and clicking the “Select” button.

- ▶ Do the same for package #2 and Package #3.

Select

Items already selected in the work dialog will not be available in the list below

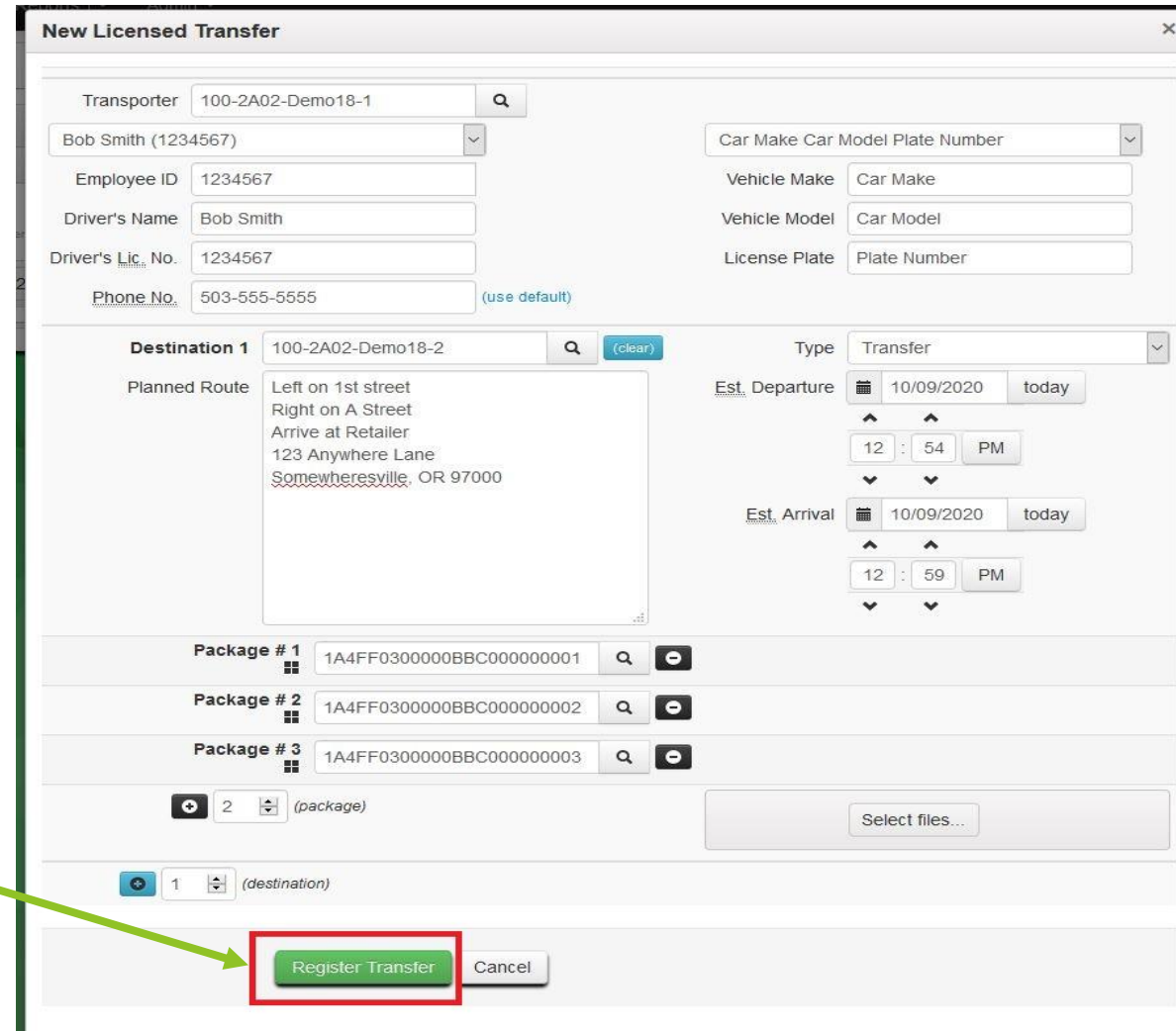
Tag	Src. H's	Src. Pkg's	Location	Patient	Item	Category	Item Strain	Quantity
Q 1A4FF0300000BBC000000001					Buds (by strain) - Metrc Bliss	Buds (by strain)	Metrc Bliss	19 g
Q 1A4FF0300000BBC000000002					Buds - Metrc Bliss	Buds		19 g
Q 1A4FF0300000BBC000000003					Concentrate (Each) - Metrc Bliss	Concentrate (Each)		20 ea
Q 1A4FF0300000BBC000000004					Concentrate - Metrc Bliss	Concentrate		20 g
Q 1A4FF0300000BBC000000005					Immature Plants - Metrc Bliss	Immature Plants	Metrc Bliss	0 ea
Q 1A4FF0300000BBC000000006					Non-Infused (Plain) Pre-Roll - Metrc Bliss	Non-Infused (Plain) Pre-Roll		20 ea
Q 1A4FF0300000BBC000000007					Seeds (each) - Metrc Bliss	Seeds (each)		20 ea
Q 1A4FF0300000BBC000000008					Seeds (weight) - Metrc Bliss	Seeds (weight)		20 g
Q 1A4FF0300000BBC000000009					Shake/Trim (by strain) - Metrc Bliss	Shake/Trim (by strain)	Metrc Bliss	20 g
Q 1A4FF0300000BBC000000010					Shake/Trim - Metrc Bliss	Shake/Trim		20 g

1 2 Page 1 of 2 10 rows per page

Select Cancel

Step 6: Confirm the Information and Register the Transfer

- Once the packages have been added to the manifest, double check all the information on the manifest and then click on the “register transfer” button. The transfer is now on its way to the retail license.



The screenshot shows a web application window titled "New Licensed Transfer". It contains several input fields and sections for entering transfer details. At the bottom, a green button labeled "Register Transfer" is highlighted with a red rectangular box. A green arrow points from the text "click on the 'register transfer' button" in the list to this button.

Transporter: 100-2A02-Demo18-1

Driver Information:
Employee ID: 1234567
Driver's Name: Bob Smith
Driver's Lic. No.: 1234567
Phone No.: 503-555-5555 (use default)

Vehicle Information:
Car Make: Car Make
Car Model: Car Model
Plate Number: Plate Number

Destination 1: 100-2A02-Demo18-2 (clear)

Planned Route:
Left on 1st street
Right on A Street
Arrive at Retailer
123 Anywhere Lane
Somewheresville, OR 97000

Type: Transfer

Est. Departure: 10/09/2020 today
12 : 54 PM

Est. Arrival: 10/09/2020 today
12 : 59 PM

Packages:
Package # 1: 1A4FF0300000BBC000000001
Package # 2: 1A4FF0300000BBC000000002
Package # 3: 1A4FF0300000BBC000000003

Buttons: Select files... (package), 2 (destination)

Footer: Register Transfer, Cancel

Step 7: Confirm Manifest Generation

- ▶ After clicking on the “Register Transfer” button, the pop up window will disappear and you will see a list of your outgoing manifests.

- ▶ The manifest you just generated should be listed here with two buttons in the far right column: Edit and Void.

- ▶ We are now ready to receive the manifest at the retail license location.

- ▶ Click on the black bar in the top right corner that lists the current facility number.

Licensed Transfers

New Transfer View Manifest

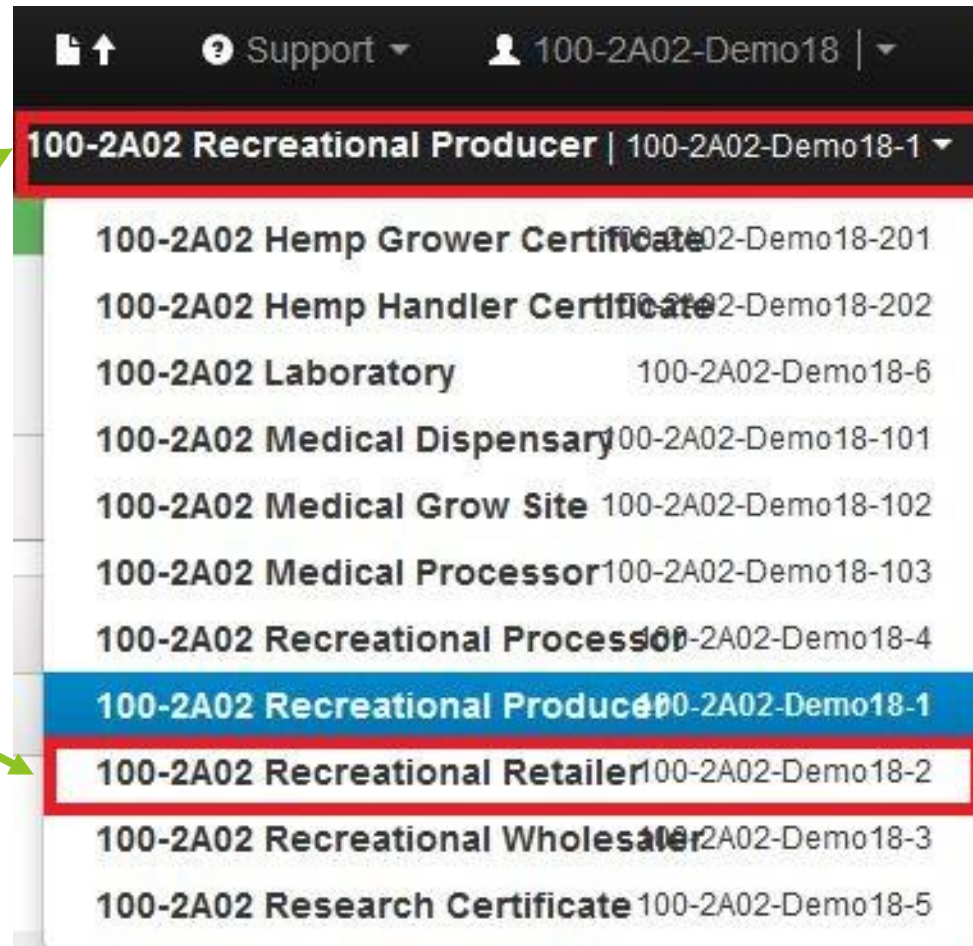
Incoming **Outgoing** Rejected

Manifest	Transporter	Driver	Vehicle Info	Destination	Stops	Pkg's	Employee	Date Created	
▶ 0000031801	100-2A02-Demo18-1 100-2A02 Recreational Producer	Bob Smith	Make: Car Make Model: Car Model Lic. Plate: Plate Number	100-2A02-Demo18-2 (100-2A02 Recreational Retailer)	1	3	Metrc Experience User	10/09/2020 12:52 pm	Edit Void

Step 8: Switch to the Retail License

- ▶ After clicking on the black bar in the top right corner, a drop down menu will appear.

- ▶ Select the retail location from the drop down.



Step 9: Go to the Incoming Transfers Section

- ▶ Follow the process in Step 1:

- ▶ Click on transfers, select the “Licensed” option from the menu.

- ▶ When the page loads, click on the “Incoming Tab”.

- ▶ Click to highlight the transfer listed there.

- ▶ It should be the same manifest number that you transferred from the previous license.

- ▶ Once highlighted, click on the “Receive” button in the far right column.

Licensed Transfers 100-2A02 Recreational Retailer | 100-2A02-Demo18-2 Oregon Sandbox

New Transfer View Manifest

Incoming Outgoing Rejected

Manifest	Origin	Type	Transporter	Driver	Vehicle Info	Pkg's	ETRA	ATRA
▶ 0000031801	100-2A02-Demo18-1 100-2A02 Recreational Producer	Transfer	100-2A02-Demo18-1 100-2A02 Recreational Producer	Bob Smith	Make: Car Make Model: Car Model Lic Plate: Plate Number	3		

Receive

Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)

Step 10: Receiving The Manifest

- ▶ A pop up window will appear, with the manifest information and each package listed. This is where you can accept or reject the packages on the manifest.
- ▶ If you wanted to reject all of the packages on the manifest, you could click the box in the green “template” area, and then click the check mark button. In this example, though, we won’t reject all the packages.

The screenshot shows a web application window titled "Receive Licensed Transfer". It contains a form with the following fields:

- Manifest:** 0000031801
- Transfer Type:** Transfer
- Origin Lic. No.:** 100-2A02-Demo18-1
- Origin Name:** 100-2A02 Recreational Producer
- Main Phone No.:**
- Mobile Phone No.:**
- Transporter Lic. No.:** 100-2A02-Demo18-1
- Transporter Name:** 100-2A02 Recreational Producer
- Phone No. for Questions:** 503-555-5555
- Employee ID:** 1234567
- Vehicle Make:** Car Make
- Driver's Name:** Bob Smith
- Vehicle Model:** Car Model
- Driver's Lic. No.:** 1234567
- License Plate:** Plate Number

Below the form is a green bar labeled "Template". To the right of this bar is a checkbox labeled "Reject" with a green checkmark icon next to it, which is highlighted by a red box. A green arrow points from the "Template" bar to this checkbox.

Below the green bar is a table with three rows of package information:

Package #	Barcode	Item	Shipped Qty	Shipped Unit	Reject
Package # 1	1A4FF0300000BBC000000001	Buds (by strain) - Metrc Bliss	19	g	<input type="checkbox"/>
Package # 2	1A4FF0300000BBC000000002	Buds - Metrc Bliss	19	g	<input type="checkbox"/>
Package # 3	1A4FF0300000BBC000000003	Concentrate (Each) - Metrc Bliss	20	ea	<input type="checkbox"/>

At the bottom of the window are two buttons: "Receive Transfer" and "Cancel".

Step 10 (continued): Receiving The Manifest

- ▶ Confirm the quantity on packages 1 and 2. On package 3, check the reject box. Select the reason as “Quality of Product” and make an optional note.
 - ▶ This will send package #3 back to the shipping license.
- ▶ Once you’ve confirmed everything is entered correctly, click on the green “Receive Transfer” button.
 - ▶ The packages that were accepted will be moved to your active packages, the rejected package will be sent back to the shipping licensee to receive back into their inventory.

The screenshot shows a web form titled "Receive Licensed Transfer". It contains several sections for data entry:

- Manifest Section:** Includes fields for Manifest (0000031801), Transfer Type (Transfer), Origin Lic. No. (100-2A02-Demo18-1), Origin Name (100-2A02 Recreational Producer), Main Phone No., and Mobile Phone No.
- Transporter Section:** Includes fields for Transporter Lic. No. (100-2A02-Demo18-1), Transporter Name (100-2A02 Recreational Producer), Phone No. for Questions (503-555-5555), Employee ID (1234567), Driver's Name (Bob Smith), Driver's Lic. No. (1234567), Vehicle Make (Car Make), Vehicle Model (Car Model), and License Plate (Plate Number).
- Template Section:** A green header with a "Reject" checkbox and a green checkmark icon.
- Package List:** Three rows for Package #1, #2, and #3. Each row includes a package ID, item name, shipped quantity, receive quantity, unit, and a reject checkbox. Package #3 is highlighted with a red border, and its reject checkbox is checked. The reject reason is "Quality of Product" and the optional note is "Not needed".
- Buttons:** A green "Receive Transfer" button and a gray "Cancel" button are at the bottom.

Annotations from the text on the left point to the "Reject" checkbox for Package #3 and the "Receive Transfer" button.

Step 11: Accept the Rejected Package Back

- ▶ Click on the black bar in the top right corner of the screen.
- ▶ Select the Producer license from the drop down menu, to switch back to the original license we sent the transfer from.



Step 11 (continued): Accept the Rejected Package Back

- ▶ When you are back in the producer license's Metrc account, follow the process from Step 1 to get back to the Transfers section.

- ▶ Once in the transfers section, click on the “Rejected” Tab.

- ▶ You'll see the manifest listed with a “receive” button in the far right column.

- ▶ Click on the “Receive” button.

The screenshot shows the Metrc web application interface. At the top, there's a navigation bar with tabs: Plants, Packages, Transfers (selected), Reports, and Admin. Below this is a header for 'Licensed Transfers'. There are two buttons: 'New Transfer' and 'View Manifest'. Below these are three tabs: 'Incoming', 'Outgoing', and 'Rejected' (which is highlighted with a red box and an arrow from the text 'Once in the transfers section, click on the “Rejected” Tab.'). The main area displays a table of transfers. The first row is highlighted. The table columns are: Manifest, License No., Receptor, Type, Transporter, Driver, Vehicle Info, Pkg's, ATRD, ETRA, ATRA, and a final column with a 'Transporters' sub-header and a 'Receive' button (highlighted with a red box and an arrow from the text 'Click on the “Receive” button.'). The first row of data shows: Manifest 000C031801, License No. 100-2A02-Demo18-2, Receptor 100-2A02 Recreational Retailer, Type Transfer, Transporter 100-2A02-Demo18-1, Driver Bob Smith, Vehicle Info Make: Car Make, Model: Car Model, Lic. Plate: Plate Number, Pkg's 3, ATRD, ETRA, ATRA. At the bottom, there's a pagination bar showing 'Page 1 of 1', '20 rows per page', and 'Viewing 1 - 1 (1 total)'.

Manifest	License No.	Receptor	Type	Transporter	Driver	Vehicle Info	Pkg's	ATRD	ETRA	ATRA	Transporters
▶ 000C031801	100-2A02-Demo18-2	100-2A02 Recreational Retailer	Transfer	100-2A02-Demo18-1 100-2A02 Recreational Producer	Bob Smith	Make: Car Make Model: Car Model Lic. Plate: Plate Number	3				Receive

Step 11 (continued): Accept the Rejected Package Back

- ▶ When the pop up window appears, you'll see the package that was rejected.
 - ▶ Confirm the reject reason that the other licensee gave and fill in your own optional note.
- ▶ Once confirmed, click on the "Receive Transfer" button.

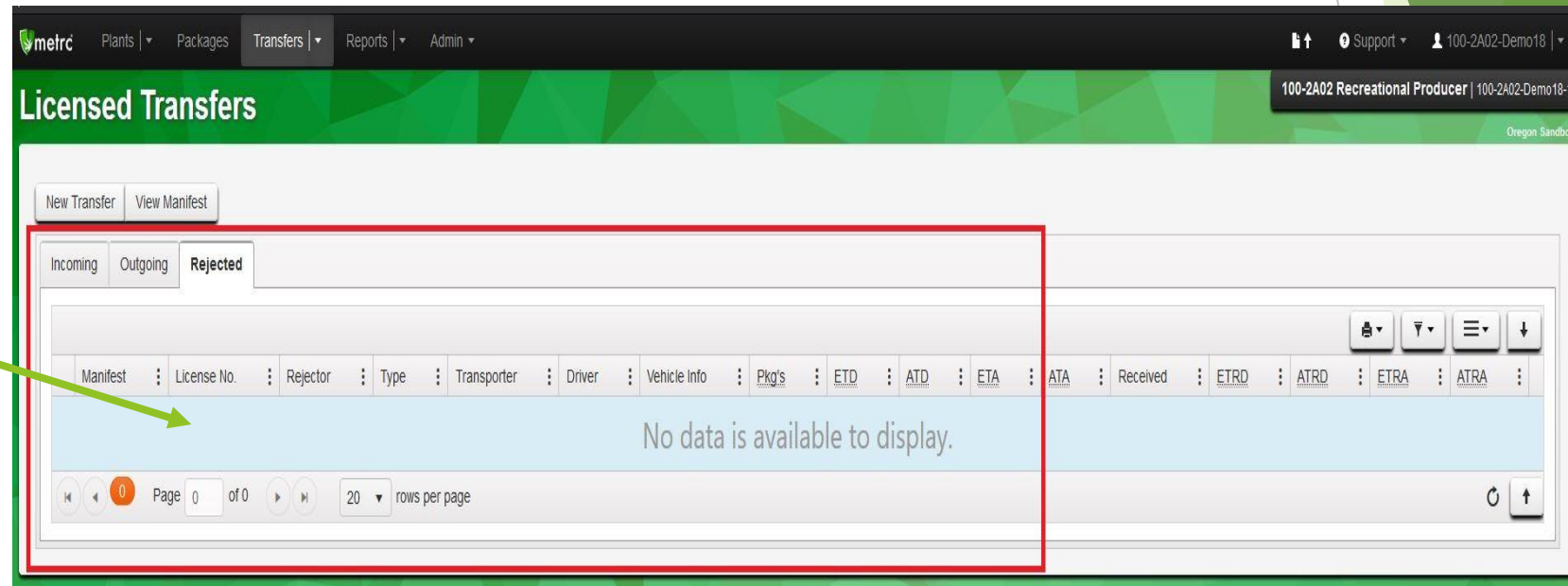
The screenshot shows a web application window titled "Receive Rejected Transfer". It contains a form with various fields for entering transfer details. A red rectangle highlights the bottom section of the form, which includes the "Package # 1" field (containing "1A4FF0300000BBC000000003"), the "Item" field (containing "Concentrate (Each) - Metrc Bliss"), the "Shipped Qty." field (containing "20" and "ea"), the "Reject Reason" dropdown menu (set to "Quality of Product"), and the "Optional Note" text box (containing "Not Needed"). Another red rectangle highlights the "Receive Transfer" button at the bottom of the window. Green arrows point from the text in the list on the left to these specific elements in the form.

Manifest	0000031801	Transfer Type	Transfer
Origin Lic. No.	100-2A02-Demo18-1	Origin Name	100-2A02 Recreational Producer
Main Phone No.		Mobile Phone No.	
Transporter Lic. No.	100-2A02-Demo18-1	Transporter Name	100-2A02 Recreational Producer
Phone No. for Questions	503-555-5555		
Employee ID	1234567	Vehicle Make	Car Make
Driver's Name	Bob Smith	Vehicle Model	Car Model
Driver's Lic. No.	1234567	License Plate	Plate Number
Package # 1		Item	Shipped Qty.
1A4FF0300000BBC000000003		Concentrate (Each) - Metrc Bliss	20 ea
		Reject Reason	Quality of Product
		Optional Note	Not Needed
Receive Transfer Cancel			

Step 11 (continued): Accept the Rejected Package Back

- The window will disappear and there will now be no rejected manifests listed in this tab.

- The rejected package has now returned to your active packages section in Metrc.



Conclusion

- ▶ This concludes the Transfers Metrc Experience Scenario.
- ▶ Please remember that this scenario is not a substitution for knowing or understanding the rules. This scenario is only meant to demonstrate the functionality of Metrc as used by Oregon Recreational Marijuana Licensees.
- ▶ For CTS functionality questions reach out to Metrc support:
 - ▶ Phone: 1-877-566-6506
 - ▶ Email: Support@Metrc.com
- ▶ For CTS compliance questions, reach out to the OLCC CTS Compliance Team:
 - ▶ Email: Marijuana.CTS@Orean.gov
 - ▶ Phone: 503-872-5190