

Beginning Inventory Guidelines for Minnesota



This document is intended to guide you through the process of tagging and reporting your beginning inventory in Metrc. This reference guide is designed as a step-by-step tool, and the information may be used in conjunction with the license specific business processes. **The external transfer steps herein are only to be used for bringing in the beginning inventory and are not the same steps that will be taken to track the active inventory in the Metrc system once the beginning inventory has been added.**

There are two types of tagged inventory in Metrc: *Plants* and *Packages*. All plants must enter the system as immature plant batches. Seeds will be brought in via Packages. *Packages* are created from immature plants, harvest batches, or other packages.

Ordering Tags

After being credentialed into Metrc, the first thing that should be done by each facility is to order plant and package tags. Both Plant and Package tags are available to cultivation licenses only. All other facility types will only have the option to order package tags. Tags are printed and shipped via UPS with a standard shipping time of 5-7 days. Please keep this in mind as it is required to have a sufficient stock of tags on hand as they are needed to enter your beginning inventory as well as any ongoing inventory activity.

To order tags, log into your Metrc account, go to the Admin area on the navigational toolbar and select the Tag Orders option from the drop down.

Please note if expedited shipping for tags is needed, you will reach out to Metrc Support after placing your order to provide the order number and payment method for which you were requesting expedited shipping.

Once in the Tag Orders grid, click on the “New Tag Order” button – **see Figure 1.**

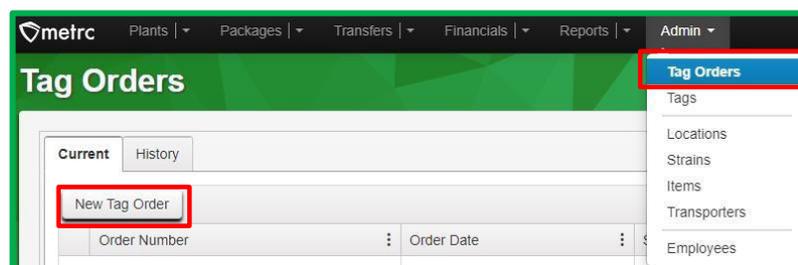


Figure 1: Ordering Tags

This will open the New Tag Order action window to create a tag order - **see Figure 2.**

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Figure 2: New Tag Order Action Window

Once all information for the tag order has been entered and verified as accurate, click the “Place Order” button to place the Tag Order.

MetrC tags are one-time use ONLY. If an error is made when assigning a plant tag when moving plants into the vegetative phase, that plant’s tag must be replaced using the “Replace Tag” option in the software. If an error is made when assigning a tag to a package, the package in question needs to be discontinued. Once discontinued, that quantity will return to the source package or harvest that the product was originally pulled from so that a new package can be created correctly.

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Once the tags arrive physically, navigate back into the Tag Orders grid (Tag Orders option under the Admin area on the navigational toolbar) for the specific facility license number, then select the “Receive” button to the far right to populate the tags in the system - **see Figure 3**. DO NOT receive your tags digitally before they physically arrive as receiving them acknowledges that the tags are in the cannabis business license’s physical possession.



Figure 3: Receiving a Tag Order

Once the receive button is selected, this will prompt a confirmation window to open to confirm the receipt of the tag order that was physically received - **see Figure 4**.

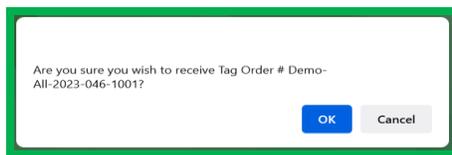


Figure 4: Confirming Receipt of a Tag Order

Each tag order will arrive and display your facility license number, name, and the unique identification number for that tag.

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Admin Setup

After a tag order has been placed, licensee Admins, based on their license type, will need to go to the Admin area and add all the Strains, Items (Item Names for products), and Locations their business license is planning to cultivate or create.

Please note: Additional Strains, Items, and Locations can always be added later as needed. Items can be updated only if the item has not been used previously. Each of these areas of Metrc is accessible via the Admin area dropdown on the navigational toolbar.

For all beginning inventory:

- Seeds must be brought in through an external transfer.
- Immature plants must be brought in through creation of plantings.
- Plants eight inches in height or taller must be brought in through plantings and be individually tagged by using the change growth phase option.

To bring in and create your beginning inventory, each of the strains must be created in the facility's Metrc account. The potency and Indica/Sativa genetics can be guessed if it is not actually known as those estimated values can always be edited later, if needed.

To create a Strain(s), go to the Admin area on the navigational toolbar and select the Strains option from the dropdown. Once in the Strains grid, click the Add Strains button - **see Figure 5**.



Figure 5: Admin Navigation (Strains)

This will open the Add Strains action window to enable the adding of the strain(s) needed. The Strain name, Testing Status, THC and CBD as well as the indication of Indica and Sativa should be entered/designated. The Strain can also be added for multiple license facilities simultaneously if needed by selecting the check box next to the licensed facility listed on the right side of the Add Strains action window. Once the strain information has been entered, click the Create Strains button to complete

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the process of creating a strain - see Figure 6.

Figure 6: Adding Strains

After strains have been created, individual items need to be created with an item name, associated category of product, a default unit of measure, and any other required item elements based on the category.

To create an item, go to the Admin area on the navigational toolbar and select the Items option from the dropdown - see Figure 7.

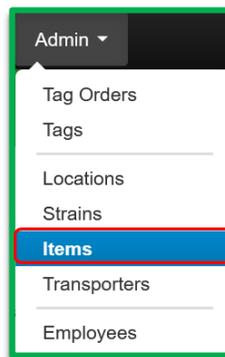


Figure 7: Items option in Admin area

Note: The workflow below is also available through the API. If interested in leveraging this option, please contact your third-party software provider for more information. Adding items will be most of the work. It is recommended you begin this process as soon as possible to provide yourself with an adequate amount of time.

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Once on the Items grid, click the Add Items button. This will open the Add Items action window to be able to create an item. In the example below, seeds are being brought in so an item will need to be created. The item name of “Seeds – Blue Dream” is used to describe the seed package that will be brought in, indicating the item category of seeds and the strain of Blue Dream – **see Figure 8**.

Figure 8: Adding Items Action Window

Further details on all Admin related setup and tagging information can also be found in Metrc Expert or Metrc Learn training, including the Metrc New Business Training which all cannabis business license employees can register for at [here](#) or in the Advanced Cultivation Training, Advanced Processor/Product Manufacturer Training, and Advanced Sales Training.

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Beginning Inventory

All beginning inventory will need to be brought into your license to ensure your Metrc electronic inventory matches your physical inventory on hand.

When reporting beginning inventory for a Cultivation license, newly created immature plant batches are created to reflect the seeds or immature plants that are being brought into the active inventory.

External Incoming Transfers Steps

External Incoming Transfers are used to bring in all existing inventory. This is a two-step process which will require creating an External Transfer and then receiving the packages and tagging with Metrc package tags. This process is for all licenses that are bringing inventory into Metrc. External incoming transfers should be used for all beginning inventory.

Both steps must be completed for the tagged packages to be reflected in your Metrc inventory.

Creating an External Incoming Transfer

To create an External Transfer, go to the Transfers area on the navigational toolbar and select the External option from the dropdown menu. From the External Transfers grid, select the Incoming tab. Then select the “New Transfer” button - see **Figure 9**.

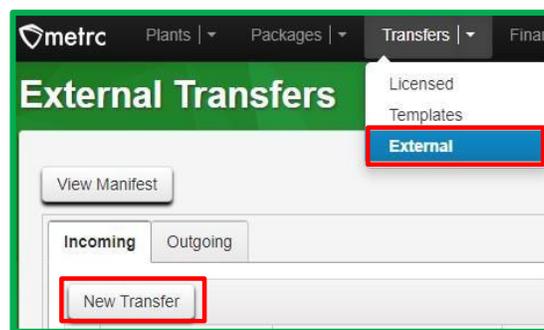


Figure 9: Incoming External Transfers

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This will open the New Incoming Transfer action window to create a transfer to bring in seeds or immature plants for beginning inventory. Complete the fields as follows:

Type: Select the Beginning Inventory Transfer option from the dropdown menu.

Phone Number: Enter a valid phone number. This can be designated as the business phone number.

Planned Route: This can be stated as “Received and weighed at the Licensed Business Number # . Verified by the Metrc Admin.”

Item Name, Quantity, and Packaged Date: These fields correspond to the specific items (the items that were previously created) and quantities being brought in for beginning inventory. The date packaged should be the day that the items are being entered into Metrc. The quantities should be exact and should account only for the product being received.

Once all required information has been entered, select the “Register Transfer” button to create a pending incoming transfer – **see Figure 10**. Creating a pending incoming transfer from Step 1 does not immediately associate Metrc package tags with those items. Without completing the External Incoming transfer, a licensee will not show the proper inventory and will not be in compliance with inventory reconciliation requirements.

Figure 10: Register Incoming Transfer

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Completing the External Transfer

The Incoming External Transfer must be completed in order to receive and create the beginning inventory. Clicking “Register Transfer” does not create tagged packages in your inventory.

Each Licensed **MUST** have package tags available to complete this step. To complete the pending Incoming External Transfer, select the “Complete” button on the far right of the External Transfer needing to be received in the External Transfers grid - see **Figure 11**.



Figure 11: Incoming External Transfer Grid

This will open the Complete Incoming Transfer action window to enter the required information. The quantities entered in Step 1 will be auto-populated; confirm the accuracy of the quantities and assign a unique Metrc package tag to each item. The package tag assigned to the seeds or immature plants in the system should be physically affixed to the associated product. Once the information is confirmed as accurate, then click on the “Complete Transfer” button to create the package(s) with the specified quantities in the inventory - see **Figure 12**.

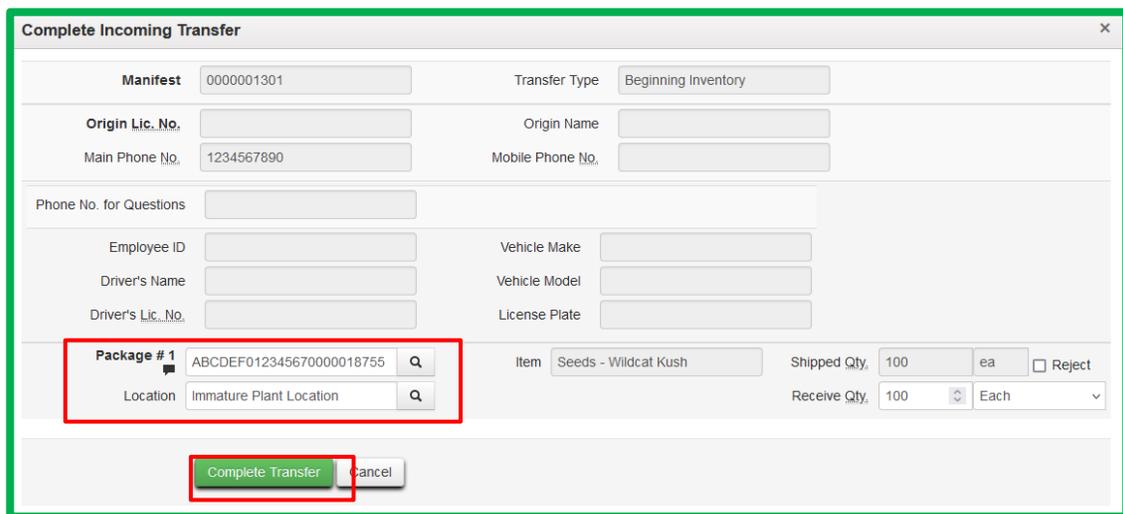


Figure 12: Complete Incoming Transfer

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Cultivation Only: Planting Seeds or Immature Plants

After bringing in all your beginning inventory via External Transfers, your licensed Metrc account should have all medical or adult-use cannabis inventory reported within the license number. Seeds, clones, and immature plants will now need to be planted within the Plants section of Metrc. After December 1st, 2025, starting plants from unauthorized sources will not be allowed. All seeds or immature plants will need to be planted from the packages. If planning on storing seeds, meaning they would not be planted as a live immature plant yet, then the seeds would be kept in package(s) per the Beginning Inventory section above.

Follow the steps below to create Immature Plant Batches from seeds or immature plants.

Once logged into Metrc, go to the Packages area on the navigational toolbar. In the Packages grid, go to the Active tab, select the package of the seeds or immature plants that need to be planted and then click the “Create Plantings” button – **see Figure 13.**

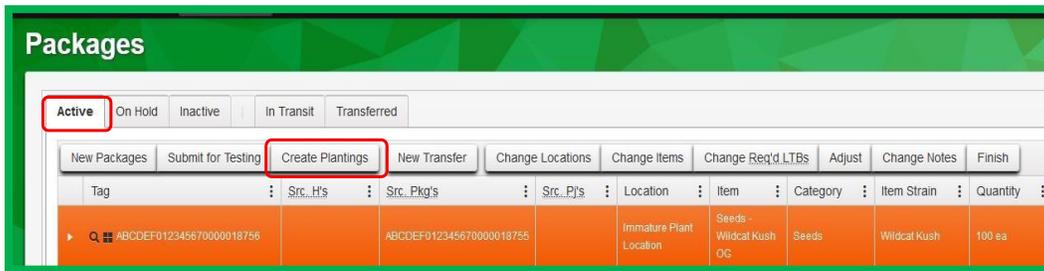


Figure 13: Selecting Package to Create Plantings

This will open the Create Plantings action window to create the Immature Plant Batch. A preferred naming convention should be used for the Group Name. It is Metrc’s best practice for the Group Name to include the Strain Name and date of planting. The example below would be how it is recommended to enter an immature plant batch of Blue Dream clones for beginning inventory where the Group Name is labeled as **Blue Dream 4.1.21_Beginning Inventory.**

Strains and Locations must already have been created in the Strains and Locations grids under the Admin area on the navigational toolbar for selection here. Use today’s date (the date of entry) for the “Planting Date.” Once the information has been entered, click on the “Create Plantings” button to create the planting(s) – **see Figure 14 below.**

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Figure 14: Creating Immature Plantings

Once the Immature Plant Batch has been created, it can be seen in the Immature tab of the Plants area on the navigational toolbar.

Please note: When bringing in beginning inventory for any packaged product, the product will come into Metrc as Not Submitted (for a testing status).

Creating Plantings for Immature Plants

To create plantings directly into Metrc for immature plants, navigate to the Plants area on the navigational toolbar, select the Immature tab and then click the Create Plantings button – see Figure 15 below.

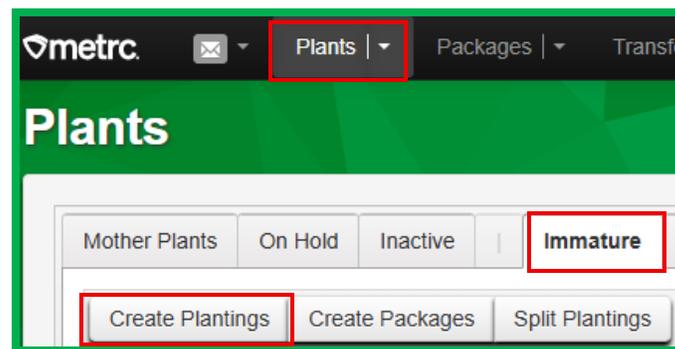


Figure 15: Immature Plants Area

This will open the Create Plantings action window. Input the data for the planting that is being created and click Create Plantings – see Figure 16.

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Figure 16: Create Plantings Modal

For any plants that are needing to be tagged, highlight the newly created plant batch and select the Change Growth Phase to open the Change Immature Plant Growth Phase action window – see Figure 17.

Figure 17: Change Growth Phase

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If you have questions, please contact Metrc Support by submitting a case in the support portal at support.metrc.com or by calling 877-566-6506.