Beginning Inventory Guidelines for Guam

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 system.**

There are two types of tagged inventory in Metrc: *Plants* and *Packages*. All plants must enter the system through immature plant batches. *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/or package RFID 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 USPS with a delivery time frame of 7-21 days. Please keep this in mind as a sufficient stock of tags is required to enter your beginning inventory.

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 you require expedited shipping for tags, contact Metrc Support after placing your order and provide your order number and payment method.

Additionally, if you need straps for attaching plant tags, you can request them to be included when ordering. Please be aware that adding straps may significantly increase shipping costs.

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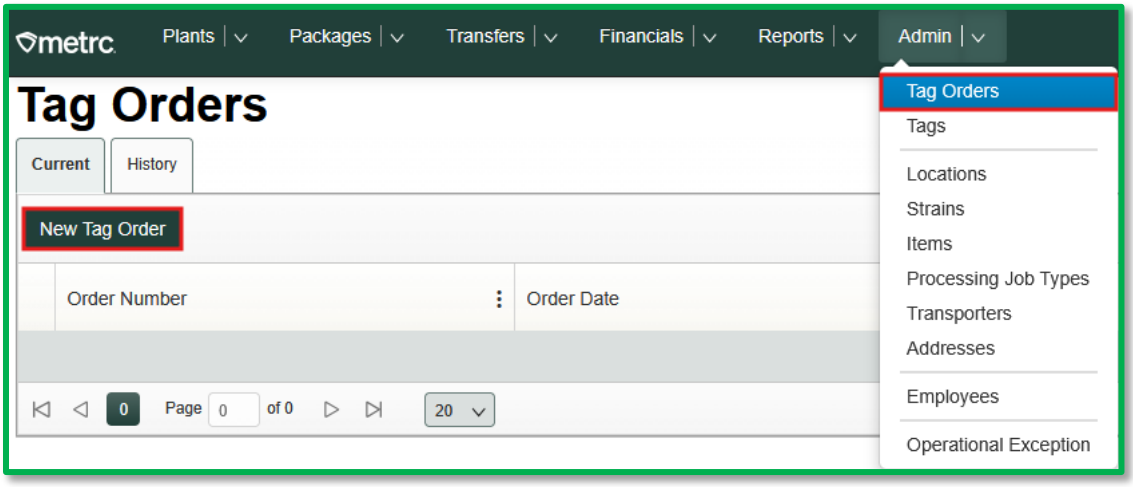
Once in the Tag Orders grid, click on the “New Tag Order” button. This will open the New Tag Order action window to create a tag order.



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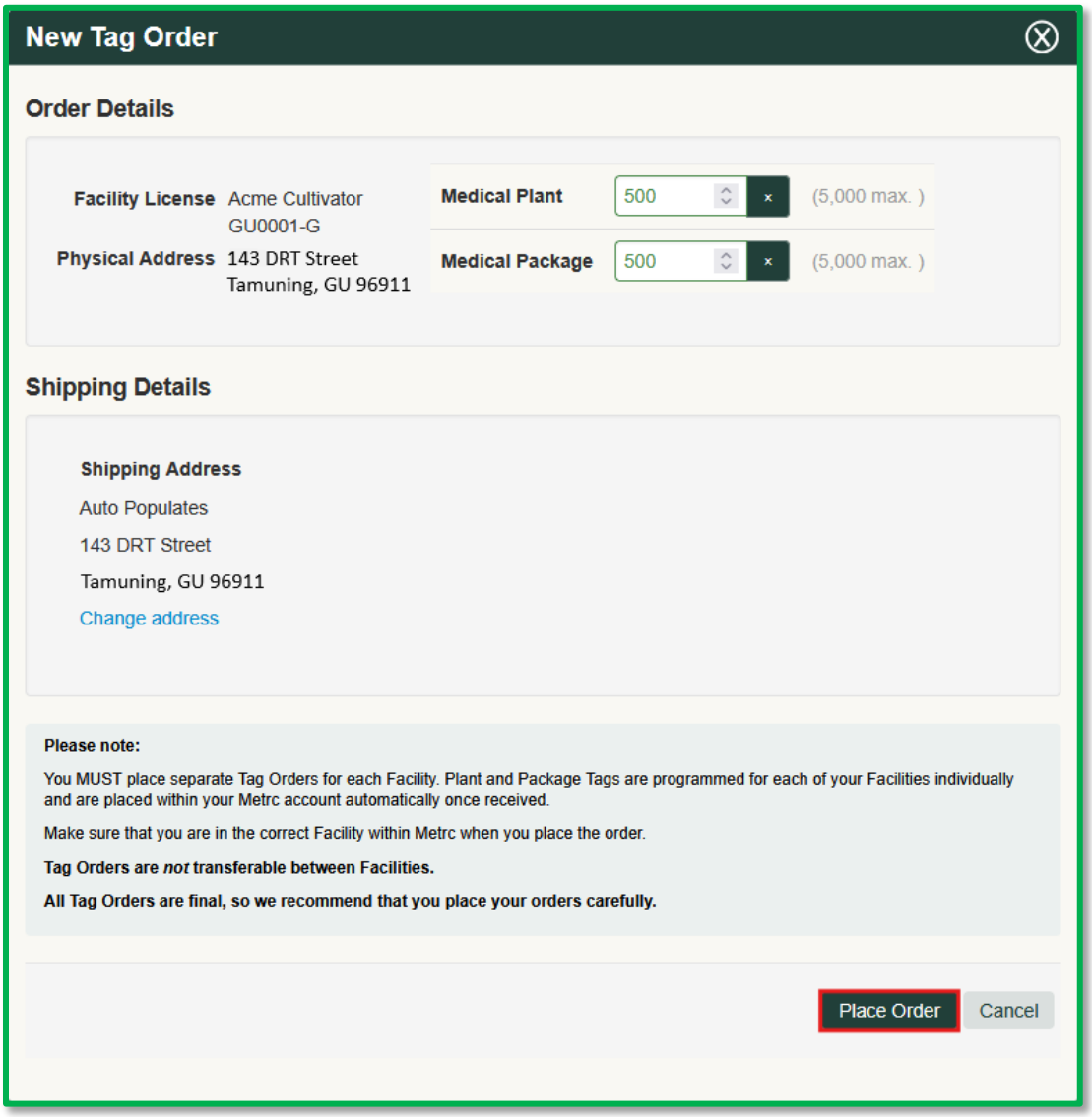

Once all information for the tag order has been entered and verified as accurate, click the “Place Order” button to place the Tag Order.

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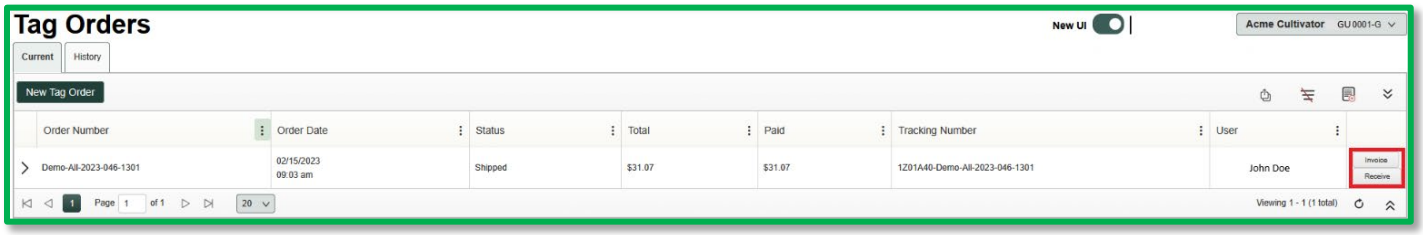
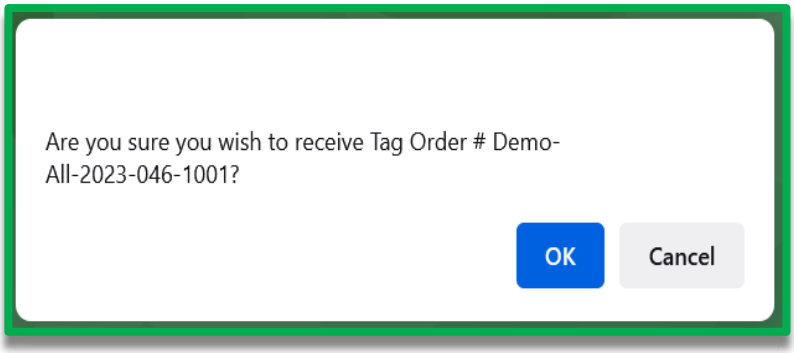
Metrc tags are one-time use ONLY. If an error is made when assigning a tag to a plant when moving plants into the vegetative phase, that plant's tag must be replaced using the "Replace Tag" option in the software. If an error is made when assigning a tag to a package, the package in question needs to be discontinued. Once discontinued, that count, or weight will return to the source package that the product was originally pulled from. Then a new package can be created with a new package tag associated with it.

Before the tags arrive (See Admin Setup), Items, Locations, and Strains must be set up in the facility's Metrc account.

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. DO NOT receive your tags digitally before they physically arrive as receiving them acknowledges that the tags are in the business license's physical possession.



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.



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

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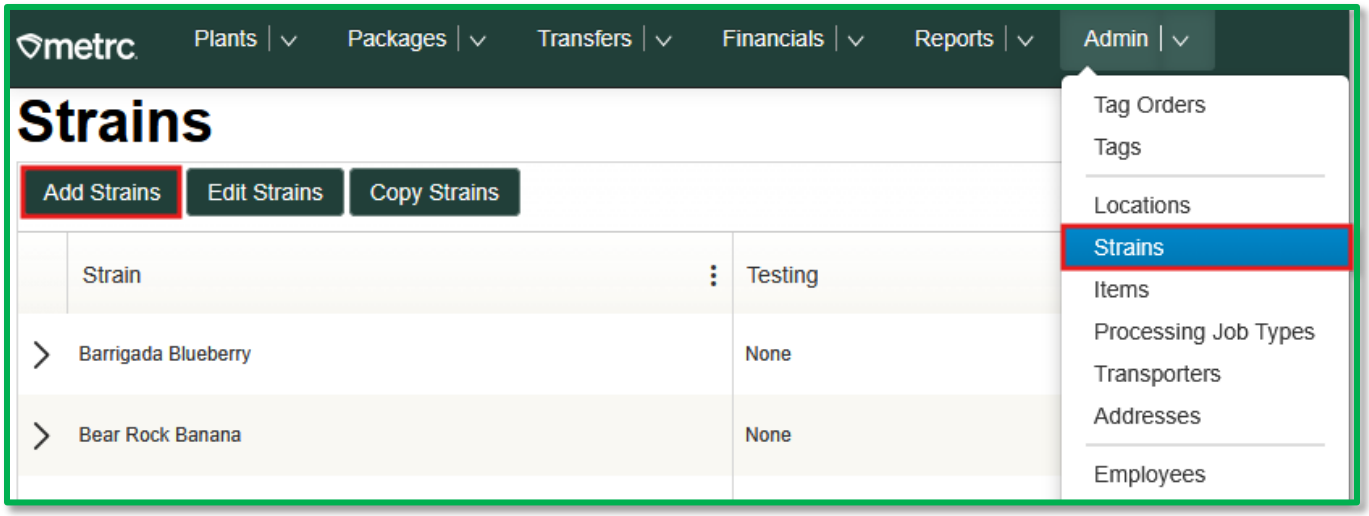
Admin Setup

After a tag order has been placed, licensees based on their license type must go to the Admin area and add all the Strains, Items (products), and Locations.

Please note that 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 live plant inventory must be brought in through the external transfer. 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 estimated if it is not actually known as those 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.



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 the process of creating a strain(s).

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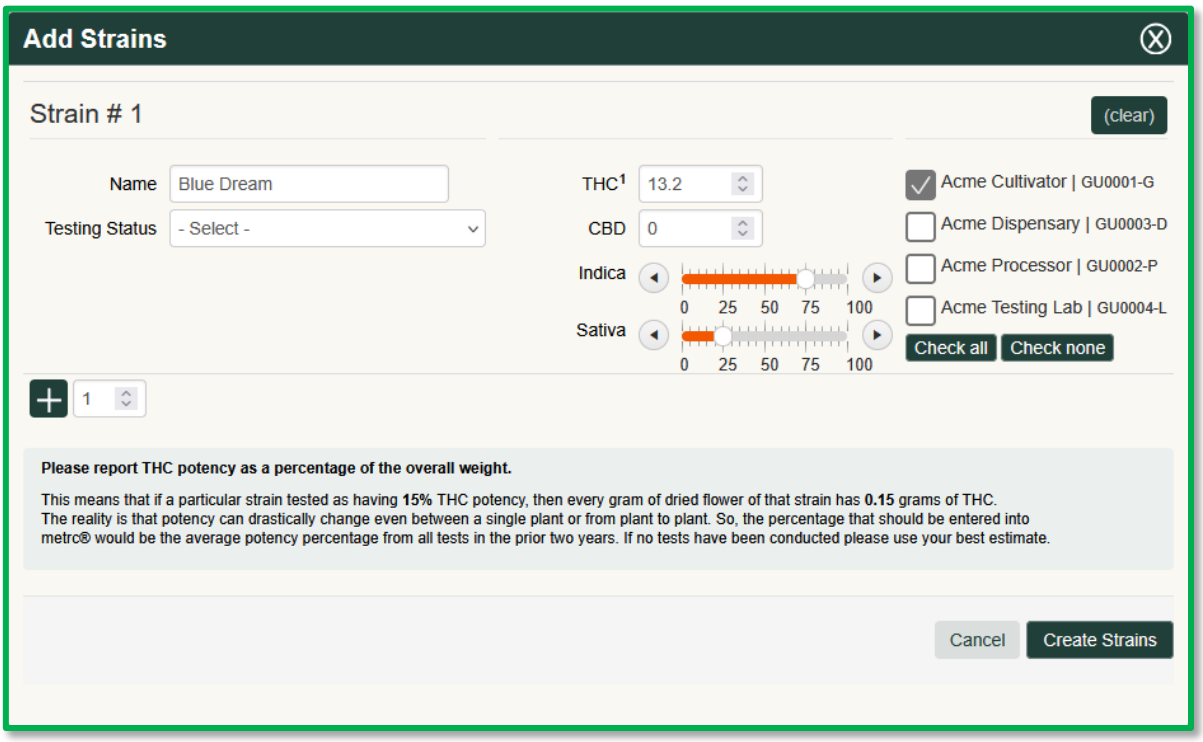
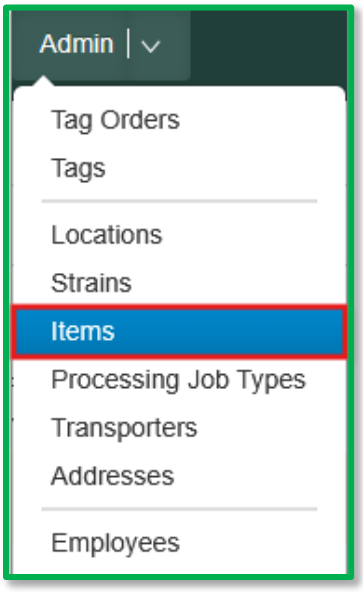


After strains have been created, individual items need to be created with an item name, associated category of product, a default unit of measure, and any other required item elements based on the category.

To create an item, go to the Admin area on the navigational toolbar and select the Items option.



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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 “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.

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, newly created immature plant batches are created to reflect the seeds or immature plants that are being brought into the active inventory.

External Incoming Transfer Steps

External Incoming Transfers are used to bring in seeds or immature plants so they can be planted. This is a two-step process that will require creating an External Transfer and packaging the seeds or immature plants. This process is intended for any Cultivation license who has seeds or immature plants inventory already on hand. External incoming transfers should be used for all license inventory.

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

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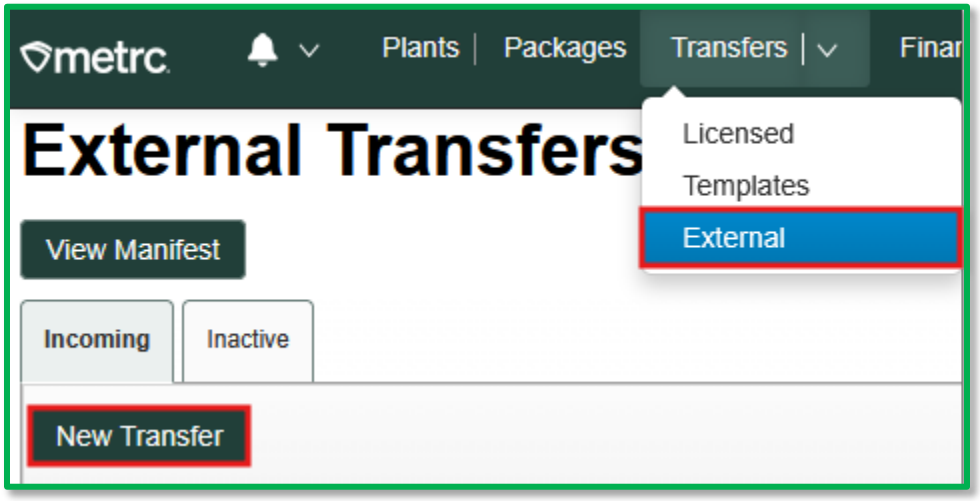
Creating an External Incoming Transfer

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 Transfer grid, select the Incoming tab. Then select the “New Transfer”.



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:

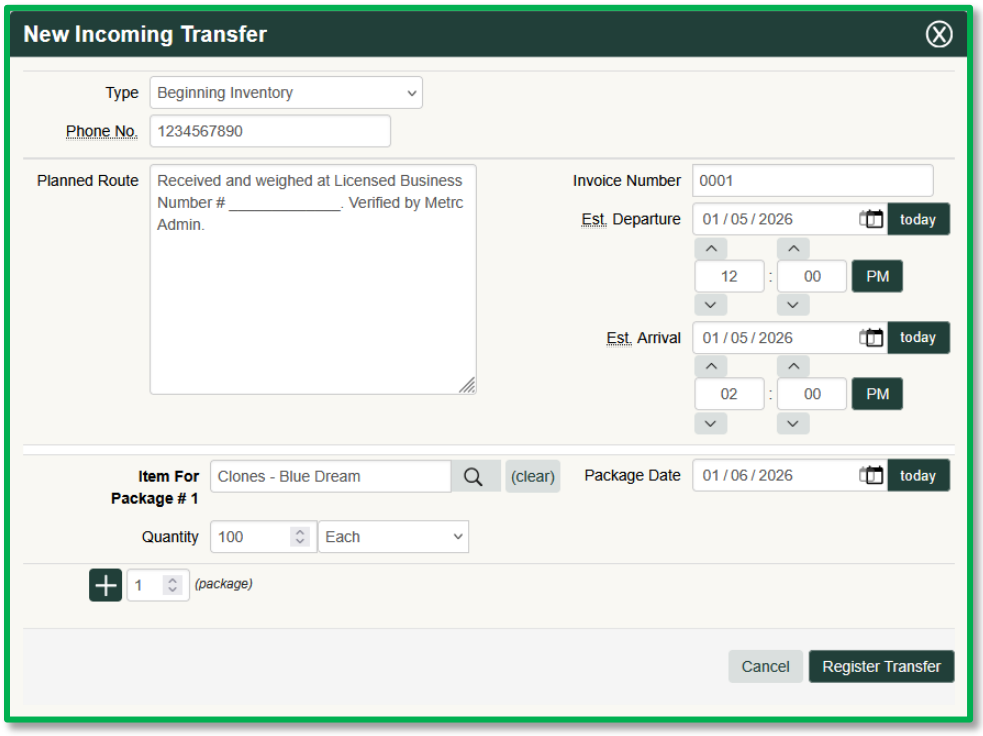
Type: Select the Beginning Inventory Transfer option from the dropdown menu.

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 #_”.

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 you are entering the items 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. Creating a pending incoming transfer from Step 1 does not immediately associate Metrc package tags with those items. Without completing the transfer, a licensee will not show the proper inventory and will not be in compliance with inventory reconciliation requirements.



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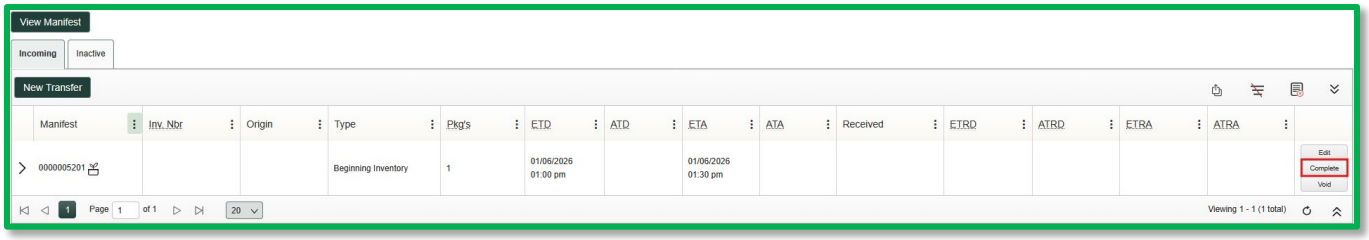
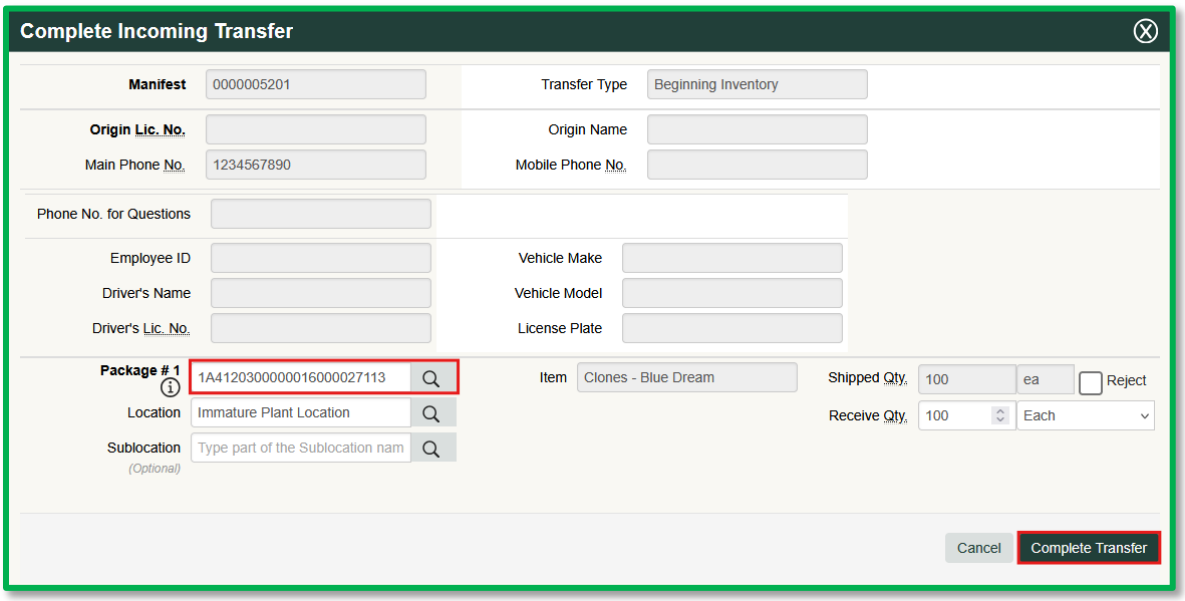
Completing the External Transfer

The External Transfer must be completed in order to complete the incoming external transfer; clicking "Register Transfer" does not create tagged packages in your inventory.

Licensees **MUST** have package tags available to complete this step. To complete the pending incoming transfer select the "Complete" button on the far right of the External Transfers in the 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 tag assigned to the product 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.



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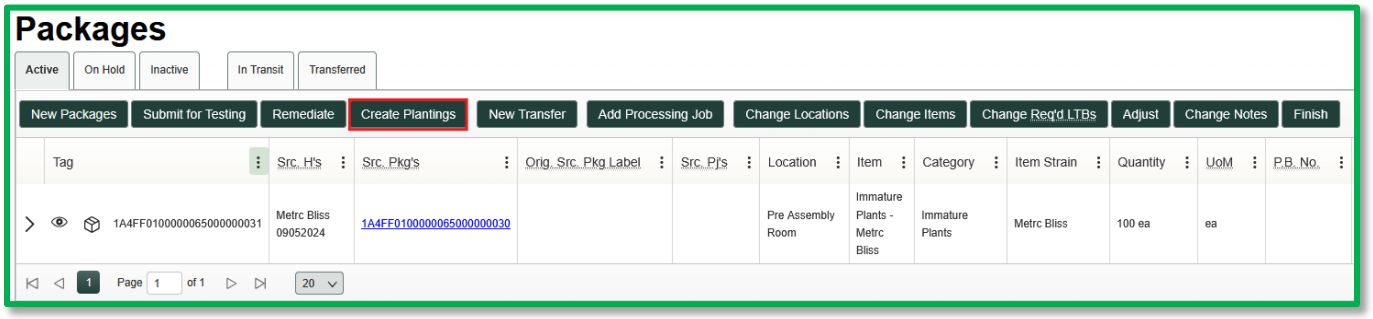
Cultivation Only: Planting Seeds or Immature Plants

After bringing in all your beginning inventory via External Transfers, your licensed Metrc account should have all marijuana inventory reported within the license number. Seeds, clones, and immature plants will now need to be planted within the Plants section of Metrc. 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, then the seeds would kept in package(s) per the Beginning Inventory section above.

Follow the steps below to plant the seeds or immature plants into Immature Plant Batches.

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.



This will open the Create Plantings action window to create the planting. A preferred naming convention should be used for the Batch Name. It is Metrc’s best practice for the Batch 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 Metrc Bliss clones for beginning inventory where the Batch Name is labeled as **Metrc Bliss 1.27.26_Beginning Inventory.**

Strains and Locations must already have been entered 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).

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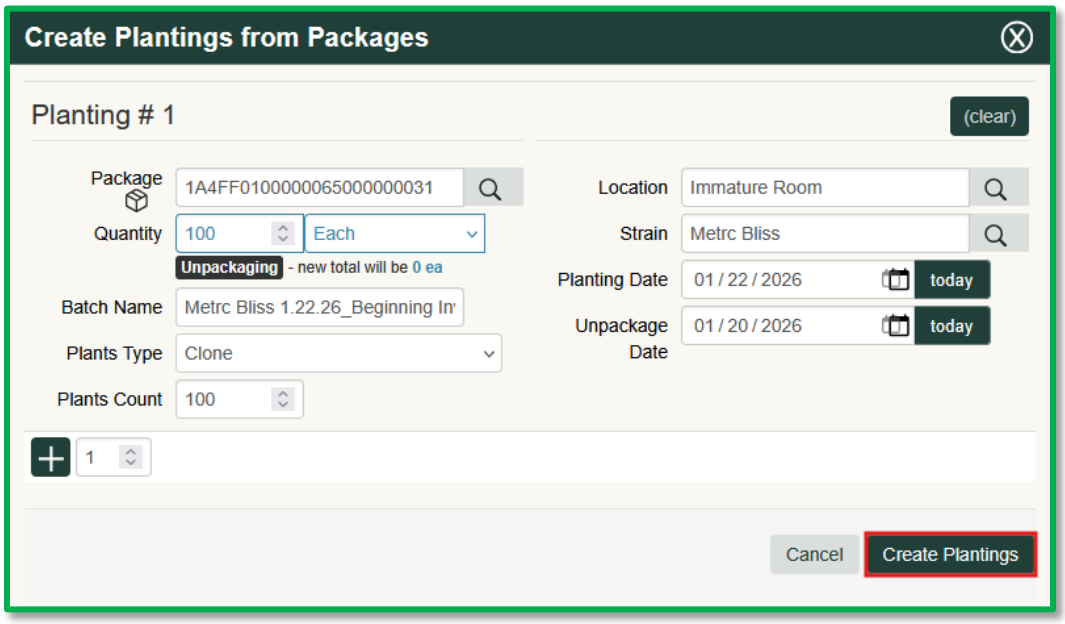

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