

Inventory Transfers

Inventory Transfers are records that document the movement of inventory from one licensed facility (or testing laboratory) to another.

This document will demonstrate and discuss:

- Three Different Manifest Types
- How to Create an Inventory Transfer
- Modifying an Inventory Transfer
- Viewing and Printing the Manifest
- Marking an Inventory Transfer “In Transit”
- Receiving an Inventory Transfer
- Voiding an Inventory Transfer

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Three Different Manifest Types

When creating an inventory transfer, it is important to first understand the three types that are available.

A **Delivery** manifest is a standard transfer where the sender will be responsible for completing all of the transfer information, to include:

- a. The Recipient
- b. The Driver Name(s)
- c. Estimated Departure and Arrival Times
- d. Vehicle Information (License Plate, Vehicle Description, and Vehicle VIN)
- e. Inventory to be Transferred
- f. Price Total per line item

The general workflow of a **Delivery** manifest is that the sender is performing the physical transport of the inventory to the receiver. In this workflow, *only* the sending facility can mark the transfer as “in transit”.

A **Pickup** manifest allows for the receiver to fill out the driver, trip, and vehicle information (b, c, and d in the list above). This is designed to facilitate a workflow in which the receiver is performing the physical transport of the inventory.

With a **Pickup** manifest type, either the sender *or* the receiver is able to mark the inventory transfer as “in transit”.

A **Licensed Transporter** manifest allows for the sending facility to select a licensed transporter business to perform the physical transport of the inventory. Upon selection of this manifest type, the driver and vehicle information are not necessary, and those fields are removed from the inventory transfer page.

Now that you understand the different types of inventory transfers/manifests available, let’s take a look at inventory transfer creation.

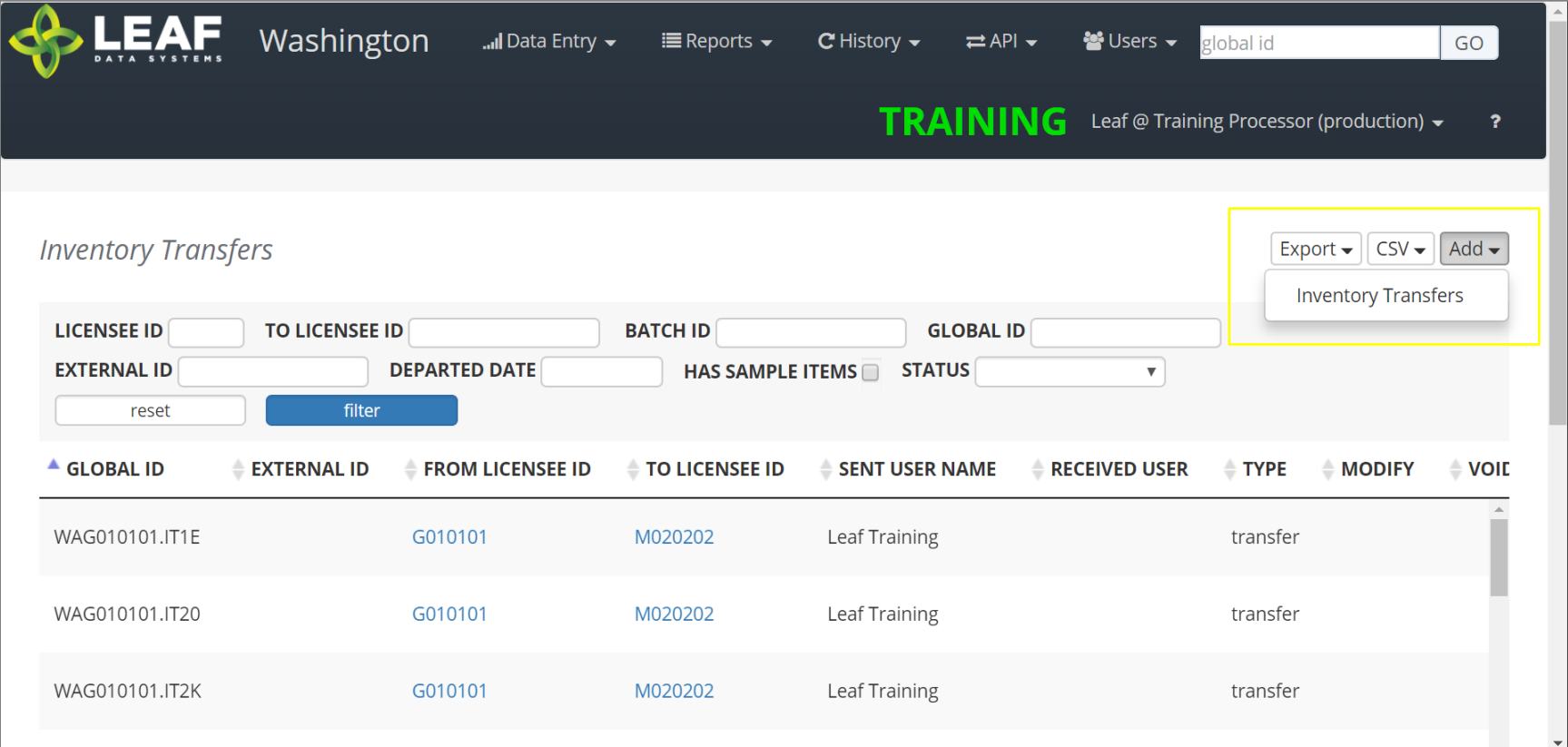
NOTE: “Multi-Stop” functionality is currently not available in Leaf Data Systems. This is being developed for a future release. PLEASE DO NOT SELECT the “Part of Multi-Stop” checkbox visible upon creating an inventory transfer. As well, the “Inventory Transfers/Deliveries” data entry listing and report will not be useable until this functionality has been completed.

How to Create an Inventory Transfer

First, navigate to 'Data Entry→Inventory Transfers':

The screenshot shows the LEAF DATA SYSTEMS Washington web application. The top navigation bar includes the LEAF logo, the word 'Washington', and several dropdown menus: 'Data Entry', 'Reports', 'History', 'API', 'Users', and a search bar labeled 'global id' with a 'GO' button. Below the navigation bar, there is a green banner with the word 'TRAINING' and a dropdown menu for 'Leaf @ Training Processor (production)' with a question mark icon. The main content area is divided into sections: 'Reports' with a sub-section 'Inventory' containing links for 'Batches', 'Destructions', 'Initial Inventories', 'Inventory Lots Report', and 'Lab Results'; 'Plants' with links for 'Batches' and 'Destructions'; and 'Miscellaneous' with links for 'Authorized Users' and 'Data Uploads'. A yellow box highlights the 'Data Entry' dropdown menu, which is open and shows a list of options: 'Areas', 'Batches', 'Conversions', 'Destructions', 'Inventory Types', 'Inventory Adjustments', 'Inventory Transfers' (highlighted with a yellow box), 'Inventory Transfer Deliveries', 'Lots', 'Strains', 'WSLCB Payment Gateway', and 'Import Manager'. The URL at the bottom of the page is 'https://traceability-training.lcb.wa.gov/inventory_transfers'.

The page displayed will show a listing of all inventory transfers that have been created at the facility. To create a new inventory transfer, click the 'Add' button in the upper-right corner, then click 'Inventory Transfers'.



LEAF DATA SYSTEMS Washington

Data Entry ▾ Reports ▾ History ▾ API ▾ Users ▾ global id GO

TRAINING Leaf @ Training Processor (production) ▾ ?

Inventory Transfers

Export ▾ CSV ▾ Add ▾

Inventory Transfers

LICENSEE ID TO LICENSEE ID BATCH ID GLOBAL ID

EXTERNAL ID DEPARTED DATE HAS SAMPLE ITEMS ☐ STATUS

GLOBAL ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	SENT USER NAME	RECEIVED USER	TYPE	MODIFY	VOIC
WAG010101.IT1E		G010101	M020202	Leaf Training		transfer		
WAG010101.IT20		G010101	M020202	Leaf Training		transfer		
WAG010101.IT2K		G010101	M020202	Leaf Training		transfer		

The first section of the inventory transfer allows for selection of the manifest type (discussed in the previous section), and the ability to choose the intended recipient of the transfer.

LEAF DATA SYSTEMS Washington

Data Entry ▾ Reports ▾ History ▾ API ▾ Users ▾ global id GO

TRAINING Leaf @ Training Processor (production) ▾ ?

Inventory Transfers Add

STATUS
open

EXTERNAL ID

MANIFEST TYPE
Delivery ▾

☐ PART OF MULTI-STOP

TO RECIPIENT
Training Retailer (dispensary) - R030303 ▾

Once you complete these two selections, scroll down to the next section.

For a manifest type of “delivery” the next section will look like this:

DRIVER*	DRIVER #2
<input type="text"/>	<input type="text"/>
EST DEPARTURE*	EST ARRIVAL*
<input type="text"/>	<input type="text"/>
LICENSE PLATE*	VEHICLE DESCRIPTION
<input type="text"/>	<input type="text"/>
VEHICLE VIN*	MANIFEST
<input type="text"/>	<input type="button" value="Choose File"/> No file chosen

For a manifest type of “pickup” the same section will look like this:

MANIFEST
<input type="button" value="Choose File"/> No file chosen

NOTE: The “Manifest” field that allows for upload of an external manifest is not necessary if you are using the Leaf Data Systems user interface directly. Leaf will generate a manifest for you upon creation of the inventory transfer.

For a manifest type of “licensed transporter” the same section will look like this:

WHO WILL BE TRANSPORTING ITEM(S)? TRANSPORTING LICENSEE	
<input type="text"/>	
EST DEPARTURE*	EST ARRIVAL*
<input type="text"/>	<input type="text"/>
MANIFEST	
<input type="button" value="Choose File"/> No file chosen	

Complete all of the fields available based on the manifest type selected in the previous step, then scroll down.

Finally, you will need to select the inventory being transferred. There are a couple of other important designations related to this inventory.

DELETE	LOT	+ADD	QTY	UOM	FOR EXTRACTION	IS SAMPLE	SAMPLE TYPE	PRODUCT SAMPLE TYPE	RETEST?	PRICE TOTAL
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="+ADD"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

save

Start typing the global ID or name of the inventory lot to be transferred. To add more lots, click the "+ADD" link above the field.

Select the quantity of the lot to be transferred.

The unit of measure is determined by the "inventory type" of the inventory lot.

If inventory being transferred from a Producer to a Processor is designated as being for extraction purposes, check this box

IS SAMPLE	SAMPLE TYPE
<input checked="" type="checkbox"/>	<input type="text" value="Non-mandatory Sample"/>
	<input type="text" value="Product Sample"/>
	<input type="text" value="Lab Sample"/>

Values entered into this field for each line item will generate a wholesale transaction record upon creation of the inventory transfer. This total represents the total price of the line item (not the unit price).

IS SAMPLE	SAMPLE TYPE	PRODUCT SAMPLE TYPE
<input checked="" type="checkbox"/>	<input type="text" value="Product Sample"/>	<input type="text" value="Budtender (educational) Sample"/>
		<input type="text" value="Vendor Sample"/>

For Samples, click the "is sample" checkbox to allow for selection of "Sample Type". "Sample Types" include:

Non-Mandatory Sample—used to request non-mandatory testing from a QA lab (results will NOT appear in Leaf)

Product Sample—used to designate educational and vendor samples, causing a secondary drop-down to appear for selection of "Product Sample" type

Lab Sample—a sample being sent to a testing lab for required QA testing; selecting this sample type enables selection of the "Retest" checkbox to denote that an inventory lot is being retested

Once all of the applicable forms have been completed, click the 'Save' button to create the transfer.

Modifying an Inventory Transfer

To modify an Inventory Transfer record that has been created, navigate to 'Data Entry→Inventory Transfers'. Search for the transfer you wish to modify, and click the pen icon in the "Modify" column.

The screenshot shows the 'Inventory Transfers' page in the LEAF DATA SYSTEMS Washington application. The page includes a search bar at the top with fields for LICENSEE ID, TO LICENSEE ID, BATCH ID, GLOBAL ID, EXTERNAL ID, and DEPARTED DATE. Below the search bar is a table of inventory transfer records. The table has columns: GLOBAL ID, EXTERNAL ID, FROM LICENSEE ID, TO LICENSEE ID, SENT USER NAME, RECEIVED USER, TYPE, MODIFY, VOID, SALES GLOBAL ID, HOLD STARTS AT, and HOLD ENDS AT. A yellow box highlights the 'MODIFY' column, which contains pen icons for each record. A mouse cursor is pointing at the pen icon for the record with GLOBAL ID WAM020202.IT29.

GLOBAL ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	SENT USER NAME	RECEIVED USER	TYPE	MODIFY	VOID	SALES GLOBAL ID	HOLD STARTS AT	HOLD ENDS AT
WAM020202.IT22		M020202	L050505	Leaf Training		transfer					
WAM020202.IT23		M020202	J413650	Leaf Training		transfer			WAM020202.SAV		
WAM020202.IT27		M020202	R030303	Leaf Training		transfer					
WAM020202.IT29		M020202	R030303	Leaf Training		transfer			WAM020202.SA1J	02/13/2018 04:08pm	02/14/2018 04:08pm
WAM020202.IT6		M020202	R360307	Leaf Training		transfer				12/20/2017 01:26pm	12/21/2017 01:26pm
WAM020202.IT7		M020202	R423784	Leaf Training		transfer					
WAM020202.IT8		M020202	R421797	Leaf Training		transfer					

This will take you back to a page similar to the screen where you created the transfer, and you can modify any information.

Viewing and Printing the Manifest

To view and print a manifest, navigate to “Data Entry→Inventory Transfers” (as in the previous step), and search for the inventory transfer record you wish to view the manifest for. Click the gear icon in the “Manifest” column of the line item. This will produce the following:

LEAF DATA SYSTEMS Washington | Data Entry | Reports | History | API | Users | global id | GO | **TRAINING** Leaf @ Training Processor (production) ?

Transportation Manifest

Transfer Manifest Title
MARIJUANA TRANSPORTATION MANIFEST
MANIFEST ID: WAG010101-IT1E

EMAIL FORM TO: Email | Send | Mark In-Transit | **Print**

DATE CREATED 01/24/2018 02:29pm
DATE COMPLETED
ORIGINATING ENTITY
Training Producer - Leaf Training #
111 E 1st Ave
Seattle WA 98111
LICENSE # G010101
PHONE 2065551111

TRANSFER GLOBAL ID WAG010101-IT1E
DESTINATION ENTITY
Training Processor
222 W 2nd Ave
Seattle WA 98111
LICENSE # M020202
PHONE 2065551111

APPROXIMATE DEPARTURE:	01/23/2018 03:28pm	Product	Wt/Qty
APPROXIMATE ARRIVAL:	01/24/2018 03:28pm	Gorilla Glue #4 Gorilla Glue #4 Flower WAG010101.JN5N WAG010101.BA6K	2001.0000 gm
VEHICLE DESCRIPTION:	Val's Car		
VEHICLE VIN, LICENSE PLATE#:	12345678986746252 123ABC		

DRIVER NAME(S): Valerie Burns .

SIGNATURE: _____

DATE: _____

PRODUCT REJECTION (if only a portion of a shipment is rejected, circle that portion above)
I confirm that the contents of this shipment match weight records entered above and I agree to take custody of portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.

NAME OF PERSON RECEIVING OR REJECTING PRODUCT: _____

SIGNATURE: _____

DATE: _____

To email the manifest, enter an email address and click the 'Send' button.

To print the manifest, click the 'Print' button.

NOTE: If you are unable to see the “gear” icon due to the word “Quarantine” in its place, this means that **AT LEAST ONE** of the inventory lots associated with the transfer does not have the appropriate lab results (or lab result attestation, for initial inventory) associated. Please double-check the lab results or lab results attestation for each lot.

Marking an Inventory Transfer as “In Transit”

From the manifest view (see previous step for navigation to manifest), click the “Mark In-Transit” button in the upper-right corner of the manifest. This will change the status of the manifest from “open” to “in-transit”. Once a manifest is designated as “in-transit”, it can no longer be modified, only received. If a manifest is marked as “in-transit” in error, the only option is to “Void” the manifest (see final section of this document) and re-create it.

The screenshot shows the 'Transportation Manifest' form in the LEAF Washington system. The top navigation bar includes 'LEAF DATA SYSTEMS', 'Washington', and various menu items like 'Data Entry', 'Reports', 'History', 'API', and 'Users'. The user is logged in as 'Training Processor (production)'. The form title is 'Transportation Manifest'. In the top right corner, there are buttons for 'Email', 'Send', 'Mark In-Transit' (circled in orange), and 'Print'. Below the title, there is a section for 'Transfer Manifest Title' with 'MARIJUANA TRANSPORTATION MANIFEST' and 'MANIFEST ID: WAG010101-IT1E'. The form is divided into several sections: 'DATE CREATED' (01/24/2018 02:29pm), 'DATE COMPLETED' (01/24/2018 03:28pm), 'ORIGINATING ENTITY' (Training Producer - Leaf Training #), 'DESTINATION ENTITY' (Training Processor, 222 W 2nd Ave, Seattle WA 98111), 'LICENSE # G010101', 'PHONE 2065551111', 'APPROXIMATE DEPARTURE' (01/23/2018 03:28pm), 'APPROXIMATE ARRIVAL' (01/24/2018 03:28pm), 'VEHICLE DESCRIPTION' (Val's Car), 'VEHICLE VIN, LICENSE PLATE #' (12345678906740252 1234BC), 'PRODUCT' (Gorilla Glue #4 Flower WAG010101, INSN WAG010101, BAKK), 'WEIGHT' (2001.0000 gm), 'DRIVER NAME(S)' (Valerie Burns), 'SIGNATURE', 'DATE', 'PRODUCT REJECTION' (if only a portion of a shipment is rejected, circle that portion above), and 'NAME OF PERSON RECEIVING OR REJECTING PRODUCT:'. The bottom section is highlighted in yellow.

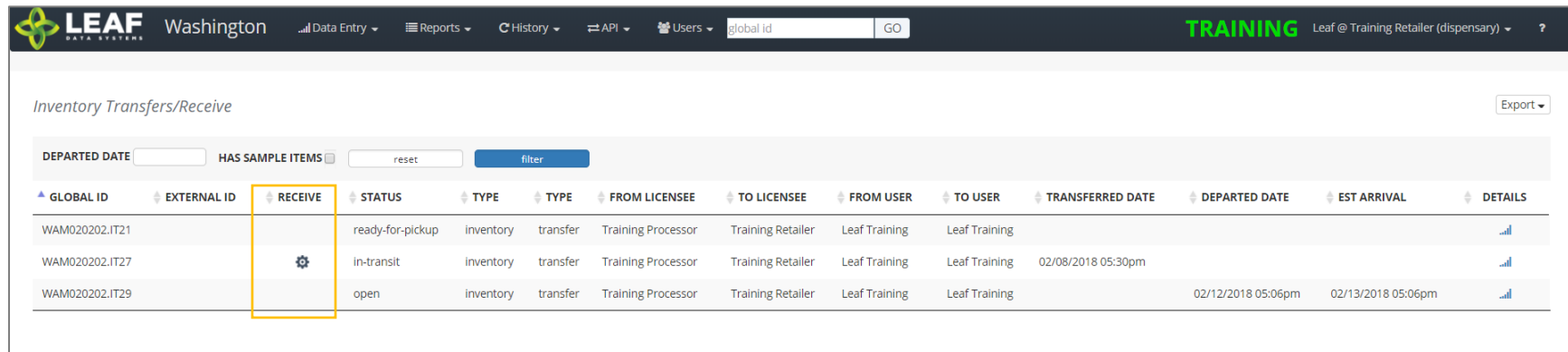
For a “pickup” manifest, once the sender has created the manifest record, the receiver should navigate to “Reports→Inventory Transfers/Ready-for-Pickup”. Then, search for the manifest that is ready for pickup, and click the pen icon in the “Driver” column. This will allow the receiver to complete the driver and vehicle information pertaining to the transfer. A receiver would use the same process denoted above to mark the transfer as “in transit”.

The screenshot shows the 'Inventory Transfers/Manifests' table in the LEAF Washington system. The table has columns for 'GLOBAL ID', 'EXTERNAL ID', 'FROM LICENSEE ID', 'TO LICENSEE ID', 'SENT USER NAME', 'RECEIVED USER', 'TYPE', 'SALES GLOBAL ID', 'HOLD STARTS AT', 'HOLD ENDS AT', 'MANIFEST', 'EXTERNAL MANIFEST', 'DRIVER', and 'STATUS'. The 'DRIVER' column is highlighted in orange. The table contains four rows of data, all with a status of 'ready-for-pickup'. The first row is highlighted in light blue.

GLOBAL ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	SENT USER NAME	RECEIVED USER	TYPE	SALES GLOBAL ID	HOLD STARTS AT	HOLD ENDS AT	MANIFEST	EXTERNAL MANIFEST	DRIVER	STATUS
WAM020202,IT11M	M020202	L050505	Leaf Training	transfer									ready-for-pickup
WAM020202,IT21	M020202	R030303	Leaf Training	transfer	WAM020202,SAU					Quarantined			ready-for-pickup
WAM020202,IT23	M020202	J113650	Leaf Training	transfer	WAM020202,SAV								ready-for-pickup
WAM020202,IT7	M020202	R423784	Leaf Training	transfer						Quarantined			ready-for-pickup

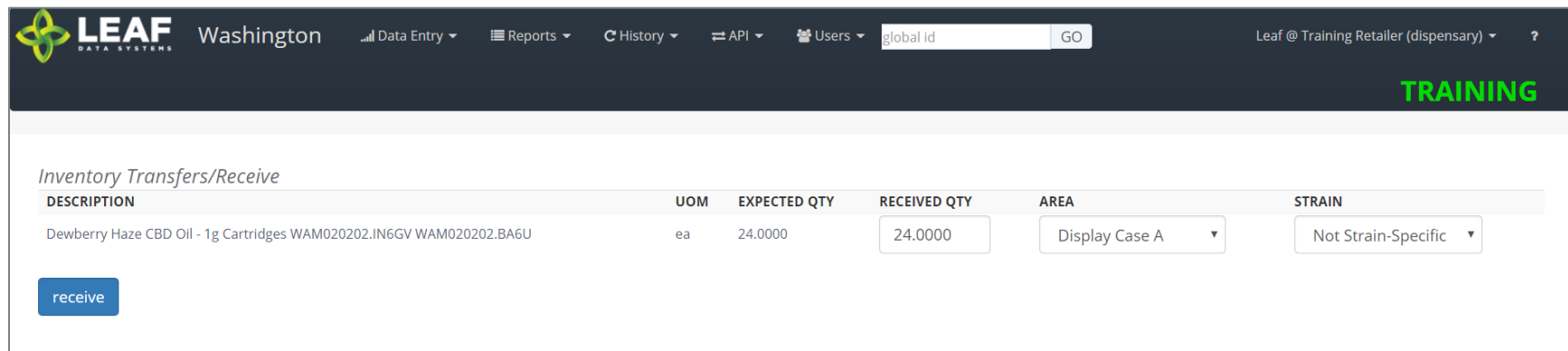
Receiving an Inventory Transfer

Once an inventory transfer has been marked as “in-transit”, receiver can accept the inventory into their facility by navigating to “Reports→Inventory Transfers/Receive”.



GLOBAL ID	EXTERNAL ID	RECEIVE	STATUS	TYPE	TYPE	FROM LICENSEE	TO LICENSEE	FROM USER	TO USER	TRANSFERRED DATE	DEPARTED DATE	EST ARRIVAL	DETAILS
WAM020202.IT21			ready-for-pickup	inventory	transfer	Training Processor	Training Retailer	Leaf Training	Leaf Training				
WAM020202.IT27		⚙️	in-transit	inventory	transfer	Training Processor	Training Retailer	Leaf Training	Leaf Training	02/08/2018 05:30pm			
WAM020202.IT29			open	inventory	transfer	Training Processor	Training Retailer	Leaf Training	Leaf Training		02/12/2018 05:06pm	02/13/2018 05:06pm	

Search for the transfer to be received, then click the gear icon in the “Receive” column. On the screen that appears (below), enter the received quantities for each line item of the transfer. Select an ‘Area’ from the drop-down menu to receive the inventory into. Finally, if the product is strain-specific, select the local strain associated with it. If it is not strain-specific, the default value in this field will denote this.



DESCRIPTION	UOM	EXPECTED QTY	RECEIVED QTY	AREA	STRAIN
Dewberry Haze CBD Oil - 1g Cartridges WAM020202.IN6GV WAM020202.BA6U	ea	24.0000	24.0000	Display Case A	Not Strain-Specific

receive

Click the ‘receive’ button once all of the information for each line item has been completed.

Voiding an Inventory Transfer

To void an Inventory Transfer record that has been created, navigate to 'Data Entry→Inventory Transfers'. Search for the transfer you wish to modify, and click the eraser icon in the "Void" column. Once a manifest has been voided, it will say "VOID" in red in this column.

LEAF DATA SYSTEMS Washington Data Entry Reports History API Users global ID GO TRAINING Leaf @ Training Processor (production) ?

Manifest voided

Inventory Transfers Export CSV Add

LICENSE ID TO LICENSEE ID BATCH ID GLOBAL ID EXTERNAL ID DEPARTED DATE HAS SAMPLE ITEMS

STATUS reset filter

GLOBAL ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	SENT USER NAME	RECEIVED USER	TYPE	MODIFY	VOID	SALES GLOBAL ID	HOLD STARTS AT	HOLD ENDS AT	MANIFEST	EXTER
WAM020202.IT21	M020202	R030303	Leaf Training	transfer					WAM020202.SAU			Quarantined	
WAM020202.IT22	M020202	L050505	Leaf Training	transfer									
WAM020202.IT23	M020202	J413650	Leaf Training	transfer					WAM020202.SAV				
WAM020202.IT27	M020202	R030303	Leaf Training	transfer				VOID					
WAM020202.IT29	M020202	R030303	Leaf Training	transfer					WAM020202.SA1J	02/13/2018 04:08pm	02/14/2018 04:08pm	Quarantined	
WAM020202.IT6	M020202	R360307	Leaf Training	transfer						12/20/2017 01:26pm	12/21/2017 01:26pm		
WAM020202.IT7	M020202	R423784	Leaf Training	transfer								Quarantined	
WAM020202.IT8	M020202	R421797	Leaf Training	transfer									