



## CA Delivery – Product Intake

<b>Creation Date:</b> 11/13/2024	<b>Department:</b> Supply Chain	<b>Doc No:</b> INV-PIN-001	<b>Approved Version:</b> 1.1
<b>Procedure Owner:</b> Depot Team	<b>Process Author:</b> Isaac Anderson   Nebill Negash Alex Strosin	<b>Final Approved By:</b> Isaac Anderson	<b>Approval Date:</b> 11/15/2024
<b>Author Signature:</b> 		<b>Approver Signature:</b> 	

### 1. Purpose:

- 1.1. To provide instruction on how to compliantly inspect product and receive into Odoo and Metrc, and upload to the menu.

### 2. Scope:

- 2.1. Products are purchased from vendors via Purchase Orders. Once product has been delivered to a depot, it is received in Odoo and Metrc so that it can be sold or used in various operations.

### 3. Responsible Parties:

- 3.1. Fulfillment Warehouse Associate
- 3.2. Depot Manager

### 4. References:

- 4.1. [Demo Video](#)
- 4.2. [Product Intake Checklist](#)
- 4.3. [Stockroom Organization SOP](#)

### 5. Definitions:

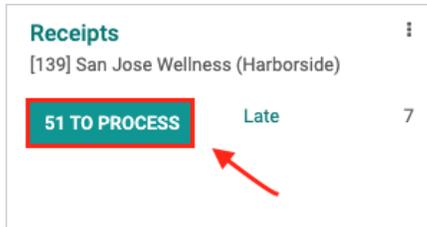
- 5.1. N/A

### 6. Procedure:

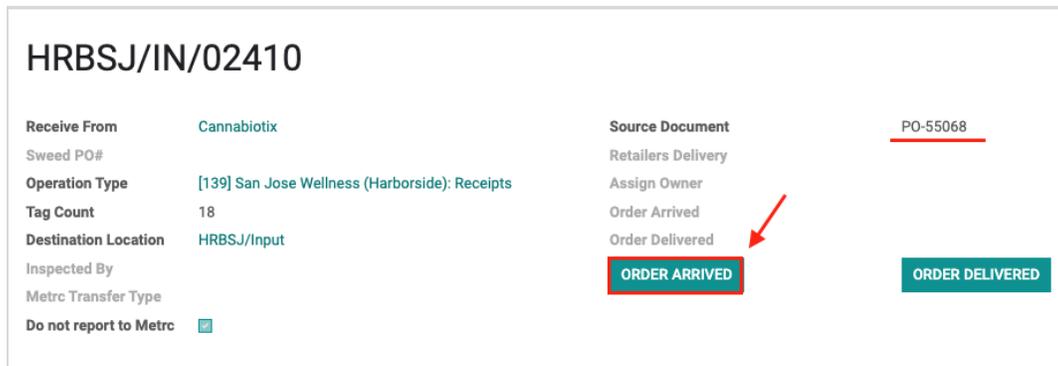
#### 6.1. Vendor Arrival

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- 6.1.1. Log into Odoo
- 6.1.2. Go to the Inventory module
- 6.1.3. Click the XX TO PROCESS button underneath receipts



- 6.1.4. Locate the appropriate receipt and click into it
- 6.1.5. Click the ORDER ARRIVED button



- 6.1.6. Request the invoice and Metrc manifest from the driver to verify against the Odoo receipt
  - 6.1.6.1. Confirm the PO# on the invoice matches the PO# in Odoo
  - 6.1.6.2. Ensure product name and quantities on the invoice are consistent with Odoo
  - 6.1.6.3. Cross-check the Metrc manifest with the invoice as well as the Odoo receipt/PO to ensure product details and quantities match
  - 6.1.6.4. Make sure that the blue Metrc tags match the lot numbers on the manifest

## 6.2. Product Inspection

- 6.2.1. Space out products according to PO for easy reference
  - 6.2.1.1. Keep the Metrc manifest nearby but prioritize using the PO/invoice for verification
- 6.2.2. Check for any signs of damage or tampering - reject any compromised items and communicate to inventory channels on Slack
- 6.2.3. Compare the physical product with the product listed on the PO, as well as information listed on the COA, and confirm the following are accurate:
  - 6.2.3.1. **Product Name**
    - 6.2.3.1.1. The exact product name will often be different from one document to another (Metrc may include serving size and batch number in the product name, for example), but it should be obvious which product is which. Reach out to your Regional Inventory Manager if you have any questions.
  - 6.2.3.2. **Quantity**
  - 6.2.3.3. **Batch Number** (only on Odoo receipt or COA)

6.2.3.3.1. If the batch number on the physical product does not match the batch number listed in Odoo or on the COA, then that product must be rejected and the rejection must be communicated in [#ca\\_inventory](#) on Slack

**6.2.3.4. Expiration Date**

6.2.3.4.1. **Flower, Prerolls:** 3-month freshness policy starting from testing date

6.2.3.4.2. **Concentrates, Vaporizers, Edibles:** 6-month freshness policy starting from testing date

6.2.3.4.2.1. If product falls outside of freshness policy, communicate it to your depot’s inventory channel to confirm exemption or rejection

6.2.3.4.3. Refer to the batch on the Odoo receipt for testing dates

6.2.3.4.3.1. Click the appropriate line item

6.2.3.4.3.2. Click the lot number on the next window

6.2.3.4.3.3. On the lot page, click the batch number to see testing date

The screenshot shows a product page for SR115SG. The product name is [Stone Road] Strawberry Gelatti Sugar - 1g. The testing date is 11/04/2024 15:00:00, which is highlighted with a red box. Other dates include Best before Date (11/18/2025 11:49:53), Packaged Date (11/18/2024 15:00:00), and End of Life Date (11/18/2025 15:00:00). The page also has tabs for Lots/Serial Numbers, CoA, and Testing and Recall.

Lot/Serial Number	Quantity Int...	Product	Created on	Company
1A4060300048D3D002987946	0.00	[Stone Road] Strawberry Gelatti Sugar - 1g	02/04/2025 02:02:48	Eaze Depot (CA) - Harborside

6.2.4. If a product is being delivered AND it’s listed on the Odoo receipt, but it’s NOT on the Metrc manifest, ask the driver to provide an updated manifest

6.2.5. If a product is being delivered AND it’s listed on the Odoo receipt, but it’s NOT on the vendor invoice, ask the driver to provide an updated invoice

6.2.6. If a product is being delivered AND it’s listed on the vendor invoice, but it’s NOT on the Odoo receipt, reject the product and ask the driver to provide an updated invoice

6.2.7. Sign both copies of the Metrc manifest, and have the driver do the same

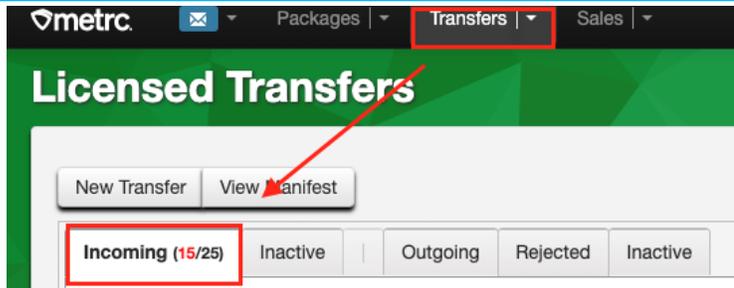
6.2.7.1. One copy for the driver, one copy for the depot

**6.3. Receiving in Metrc**

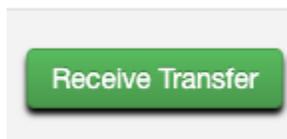
6.3.1. Log into Metrc

6.3.2. Go to the Transfers page

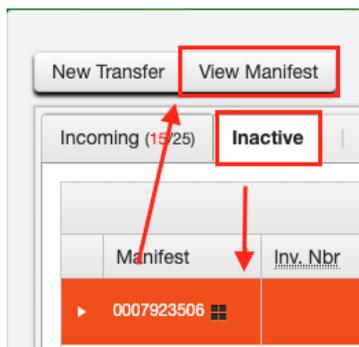
6.3.3. Click the Active tab



- 6.3.4. Find the appropriate transfer
- 6.3.5. Click the Receive button on the right
- 6.3.6. If any products need to be rejected, do the following:
  - 6.3.6.1. Checkmark the Reject box
  - 6.3.6.2. Select a rejection reason
- 6.3.7. If Shipped Quantity is inaccurate, correct it in the Received Qty field
- 6.3.8. Once quantities are confirmed and all rejections have been made, click Receive Transfer at the bottom



- 6.3.9. On the Transfers page, click the Inactive tab
- 6.3.10. The transfer you just received will be at the top of the list
- 6.3.11. Highlight it, and click View manifest



- 6.3.12. Download the manifest

## 6.4. Receiving in Odoo

- 6.4.1. Go to the Inventory module
- 6.4.2. Click the XX TO PROCESS button underneath receipts
- 6.4.3. Locate the appropriate receipt and click into it
- 6.4.4. Click the ORDER DELIVERED button

**HRBSJ/IN/02410**

<b>Receive From</b>	Cannabiotix	<b>Source Document</b>	<u>PO-55068</u>
Sweed PO#		Retailers Delivery	
<b>Operation Type</b>	[139] San Jose Wellness (Harborside): Receipts	Assign Owner	
<b>Tag Count</b>	18	Order Arrived	
<b>Destination Location</b>	HRBSJ/Input	Order Delivered	
Inspected By		<b>ORDER ARRIVED</b>	<b>ORDER DELIVERED</b>
Metric Transfer Type			
Do not report to Metrc	<input checked="" type="checkbox"/>		

- 6.4.5. Go to the Notes section (either at the bottom or on the side, depending on your screen’s resolution)
- 6.4.6. Click the paperclip icon
- 6.4.7. Click Add Attachments

Send message   Log note   Schedule activity   

**Attachments**

[+ Add Attachments](#)

Yesterday

Note by **Rachael Sklar** - 21 hours ago  
 This transfer has been created from: **PO-55068**

- 6.4.8. Attach the Metrc manifest
- 6.4.9. On the Detailed Operations tab, enter quantities received under the Qty Done column
- 6.4.10. Click VALIDATE in the upper left

Inventory Overview / [139] San Jose Wellness

**EDIT**   **CREATE**

**VALIDATE**   **PRINT**   **UNLOCK**   **CANCEL**

**HRBSJ/IN/02410**

**6.5. Vendor Bill**

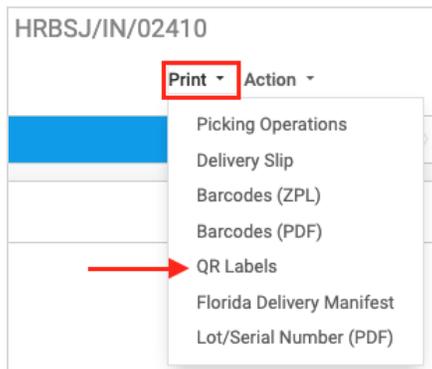
- 6.5.1. Upon validating the receipt, Odoo will automatically direct you to the vendor bill
  - 6.5.1.1. Another way to access the vendor bill:
    - 6.5.1.1.1. Go to Odoo homepage
    - 6.5.1.1.2. Go to Purchase module
    - 6.5.1.1.3. Go to Orders → Purchase Orders
    - 6.5.1.1.4. Search for the PO you’re working on and click into it

#### 6.5.1.1.5. Click CREATE BILL in the upper right

- 6.5.2. Confirm that the payment terms are NET
- 6.5.3. Enter the vendor invoice number
- 6.5.4. Click POST BILL
- 6.5.5. Go to the Notes section
- 6.5.6. Click the paperclip icon
- 6.5.7. Click Add Attachments
- 6.5.8. Attach the vendor invoice PDF file

## 6.6. QR Labels

- 6.6.1. Go back to the Odoo receipt
- 6.6.2. Click into each lot number
- 6.6.3. Click Print → QR Labels



- 6.6.4. Print out the QR labels and begin stickering each product
  - 6.6.4.1. Be sure not to cover up any branding, ingredients, product weight/dosage, the Prop 64 Warning, nor the information panel with the THC content and expiration date
- 6.6.5. Place product AND blue Metrc tags into bins, and put bins onto the shelf
  - 6.6.5.1. Refer to the [Stockroom Organization SOP](#) for guidance

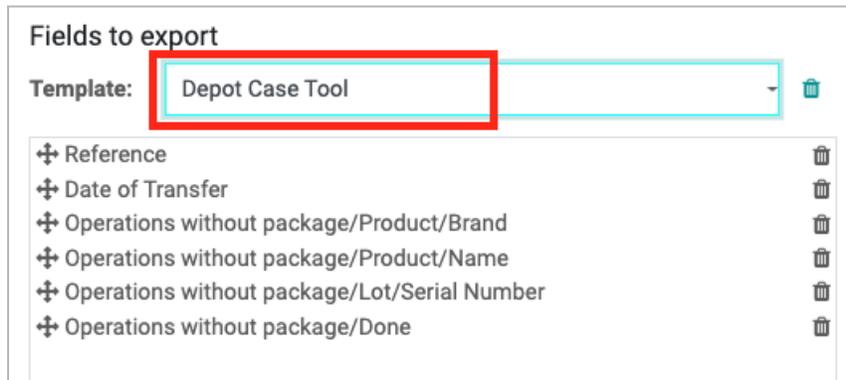
## 6.7. Odoo Internal Transfer

- 6.7.1. Once every unit has been stickered and put onto the shelf, go back to the Inventory dashboard
- 6.7.2. Click the XX TO PROCESS button underneath Internal Transfers
- 6.7.3. Locate the appropriate transfer and click into it
- 6.7.4. Confirm quantities are accurate
- 6.7.5. Click VALIDATE
- 6.7.6. You can also validate multiple internal transfers at once
  - 6.7.6.1. Click the XX TO PROCESS button underneath Internal Transfers
  - 6.7.6.2. Checkbox the appropriate transfers/PO's
  - 6.7.6.3. Click Action → Validate Multiple Transfers

## 6.8. Depot Case Upload

### 6.8.1. Export Odoos Data

- 6.8.1.1. Go back to Internal Transfers
- 6.8.1.2. Remove the “Ready” filter in the search bar
- 6.8.1.3. Select the transfer(s) you just validated
- 6.8.1.4. Click Action → Export
- 6.8.1.5. Choose “Depot Case Tool” from the Template drop-down menu



- 6.8.1.6. Click EXPORT at the bottom of the window

### 6.8.2. Download Depot Cases

- 6.8.2.1. Log into Mission Control
- 6.8.2.2. Go to the Depot Case page
- 6.8.2.3. Click DOWNLOAD CSV

### 6.8.3. Edit Depot Case Tool

- 6.8.3.1. Open your [Depot Case Tool for POs](#)
- 6.8.3.2. Open the CSV file exported from Odoos
- 6.8.3.3. Select all and copy the entire sheet
- 6.8.3.4. Paste into Cell A1 of the Odoos tab on the Depot Case Tool
- 6.8.3.5. Open the depot case CSV file
- 6.8.3.6. Select all and copy the entire sheet
- 6.8.3.7. Paste into Cell A1 of the Onfleet OLD tab
- 6.8.3.8. Go to the Onfleet NEW tab
- 6.8.3.9. Click File → Download → Comma-Separated Values (.csv)

### 6.8.4. Upload New CSVs

- 6.8.4.1. Go back to Mission Control
- 6.8.4.2. Go to the Depot Case
- 6.8.4.3. Click UPLOAD CSV
- 6.8.4.4. Select the CSV file you just downloaded
- 6.8.4.5. Make sure you see a small green banner pop up at the top of the page confirming that the upload was successful 🎉

## 7. Revision History:

REVISION NUMBER	STEPS REVISED	REASON FOR REVISION	INITIALS	EFFECTIVE DATE
1.0		Initial creation	IA	11/15/2024
1.1	Multiple	Optimized workflow	IA	02/04/2025