Metrc Support Bulletin

Bulletin Number: CA_IB_2022_007	Distribution Date: 12/28/2022	Effective Date: 12/28/2022
Contact Point: Metrc® Support	**Subject**: New Features in Metrc	
Reason: Provide information on the latest feature release.		

Greetings Metrc® Users,

Metrc is pleased to provide information on the latest updates to the software that will be available on 12/28/2022. These enhancements include:

    I.   Updates related to transfer rejections

    II.   New directional field for transfers with layovers

    III.   New optional field entries when recording sales

A detailed description of these enhancements is provided on the following pages.

Transfer Rejection Enhancements

A new *Inactive* tab has been added to the *Licensed Transfer*s page as shown in **Figure 1** below. Rejected transfers move from the *Rejected* tab to the *Inactive* tab after the origin licensee processes and accepts in the rejection. This returns the rejected packages to the origin licensee's inventory.

In addition, the license number and license name of the rejecting business have been added to both the *Rejected* and *Inactive* tabs as shown in **Figure 1**.
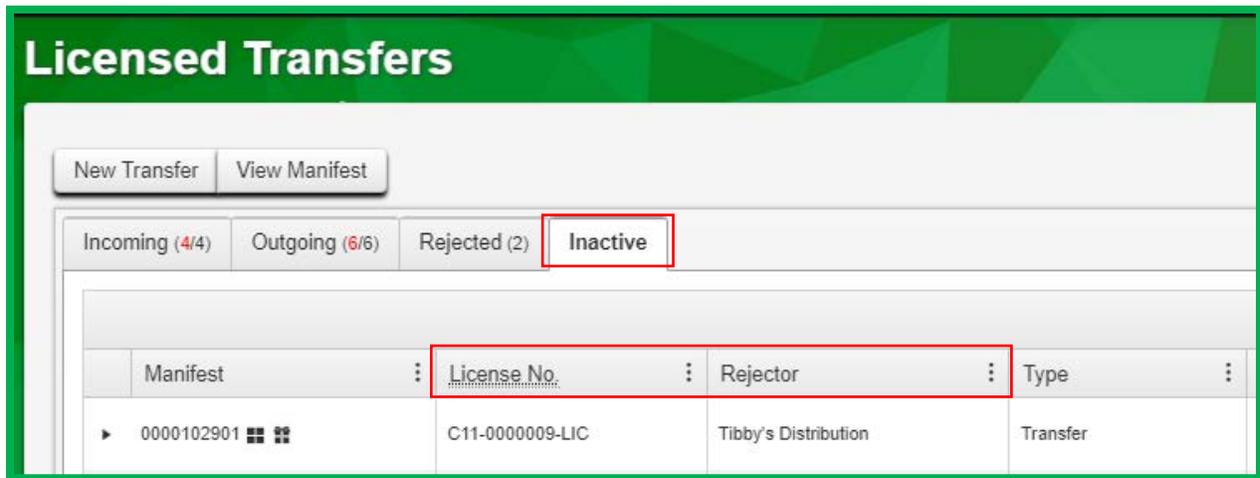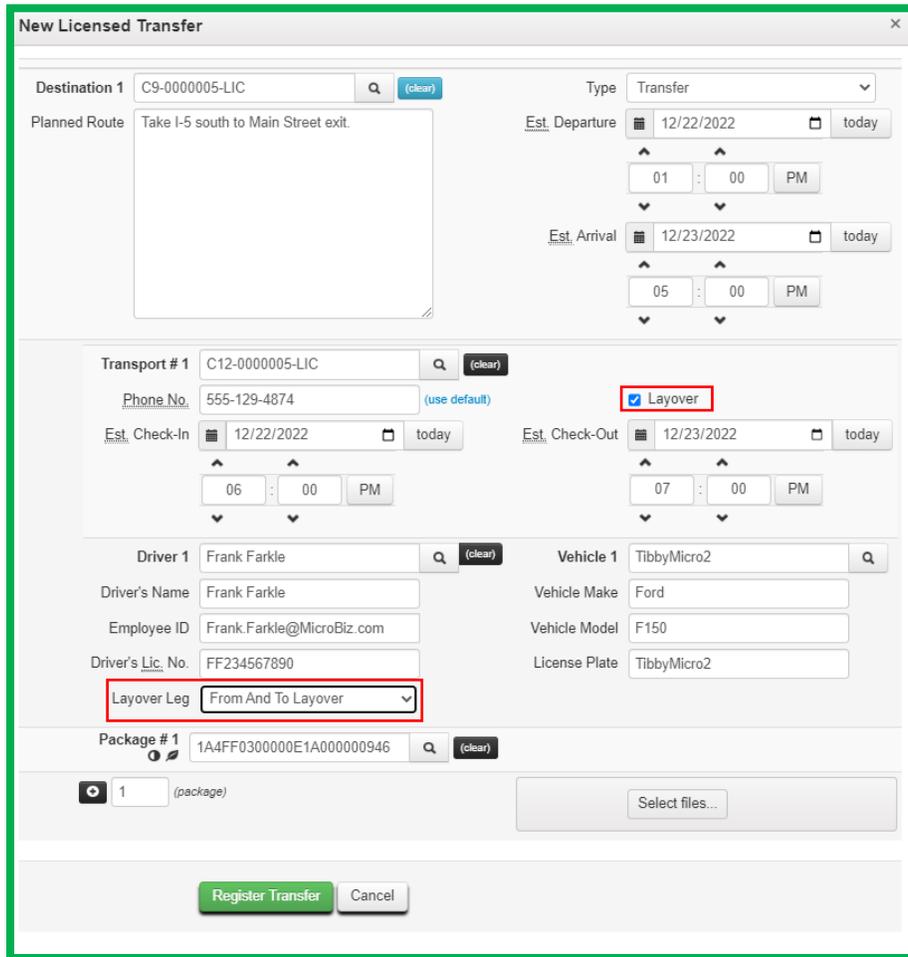

Figure 1: Licensed Transfers - Inactive Tab

New Layover Leg Field

A new *Layover Leg* field has been added to the *New/Edit Licensed Transfer* modals and the transfer manifest. It is enabled only when the *Layover* checkbox is marked as show in **Figure 2** below.

Figure 2: Layover Leg Field

There are three options that can be selected for the *Layover Leg* field:
- *From And to Layover*
- *From Layover*
- *To Layover*

In California, only one driver/vehicle can be designated for a transfer, so the *From And to Layover* option should be used.
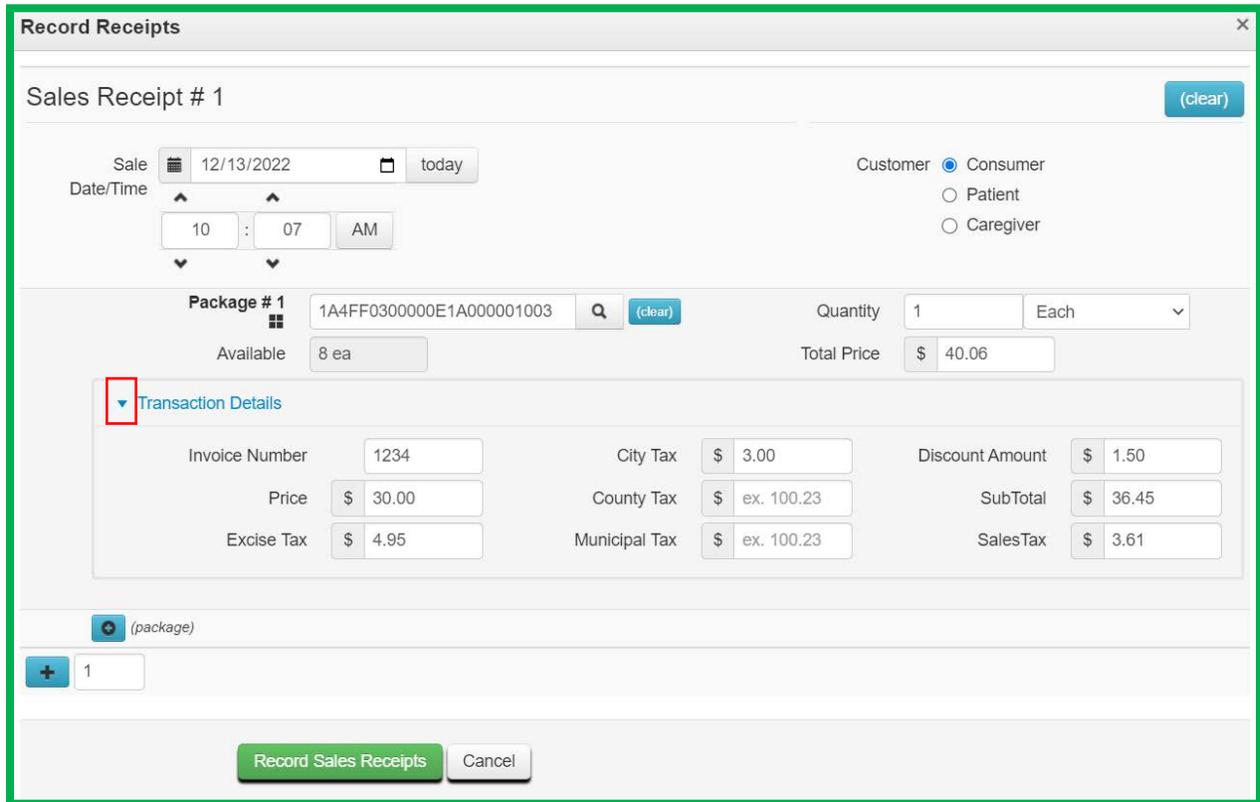
The *Layover Leg* field is also included on the manifest as shown in **Figure 3** below.

Figure 3: Layover Leg Field on Transfer Manifest

New Optional Fields for Sales

Several new optional fields will be available when recording sales receipts. To access the new fields, select the expand button for *Transaction Details* related to each package as shown in **Figure 4** below.

Figure 4: Sales Receipt – Transaction Details - Optional Fields

Below is a list of the new fields, along with guidelines from the CDTFA on the values that should be entered in each field.

- *Invoice*
  - Invoice number which documents the sale to the customer, such as the invoice number from a Point of Sales system.
- *Price*
  - Pre-tax/net selling price before all taxes
- *Excise Tax*
  - The California state cannabis excise tax. For details on how to calculate excise tax refer to https://www.cdtfa.ca.gov/industry/cannabis.htm
- *City Tax*
  - Local business tax imposed by a local jurisdiction
- *County Tax*

- County tax imposed by a county, when applicable
- *Municipal Tax*
  - This field is not currently used in California
- *Discount*
  - Use this field to record the "below the line" discount, if any, applied to the overall ticket value
  - Enter the *Discount* as a positive value
- *Subtotal*
  - *Price* + *Excise Tax* + *City Tax* + *County Tax* + *Municipal Tax* – Discount
  - Do not include the *Sales Tax*
- *Sales Tax*
  - *California sales tax*

The value in the existing *Total Price* field for each package should be entered as the *Subtotal* + *Sales Tax*. Continuing from the example in **Figure 4** above with a *Subtotal* of $36.45 and *Sales Tax* of 3.61, a value of 40.06 should be entered in the *Total Price* field as highlighted in **Figure 5** below.

Figure 5: Sales Receipt – Entry in Total Price Field

The *Transaction Details* can be viewed in the *Sales Receipt* drilldown by unhiding the columns as shown in **Figure 6** below. To unhide the columns click on the three vertical dots on any column in the drilldown and select the *Columns* option from the menu. Mark the checkboxes for the columns you wish to display.
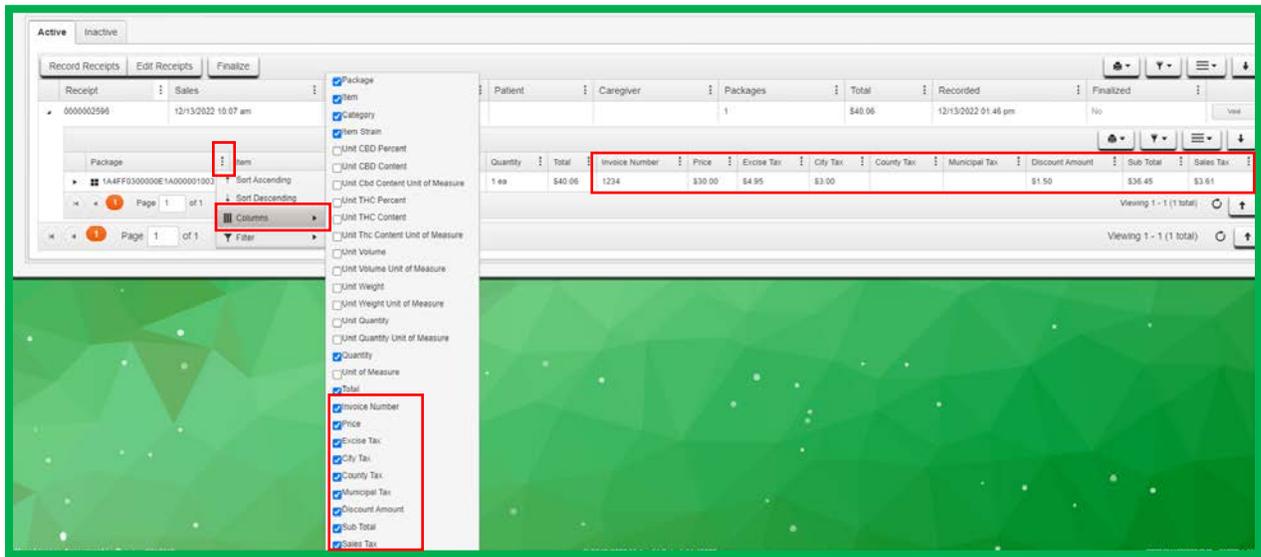
Figure 6: Sales Receipt –Transaction Details Tab

The new optional fields can also be entered using the CSV import feature in Metrc. The on-page formatting guide for the *New and Update Sales Receipts Imports* has been updated to provide direction of how to create these CSV files. **Figure 7** below shows the updates to the *New Sales Receipts Import*.
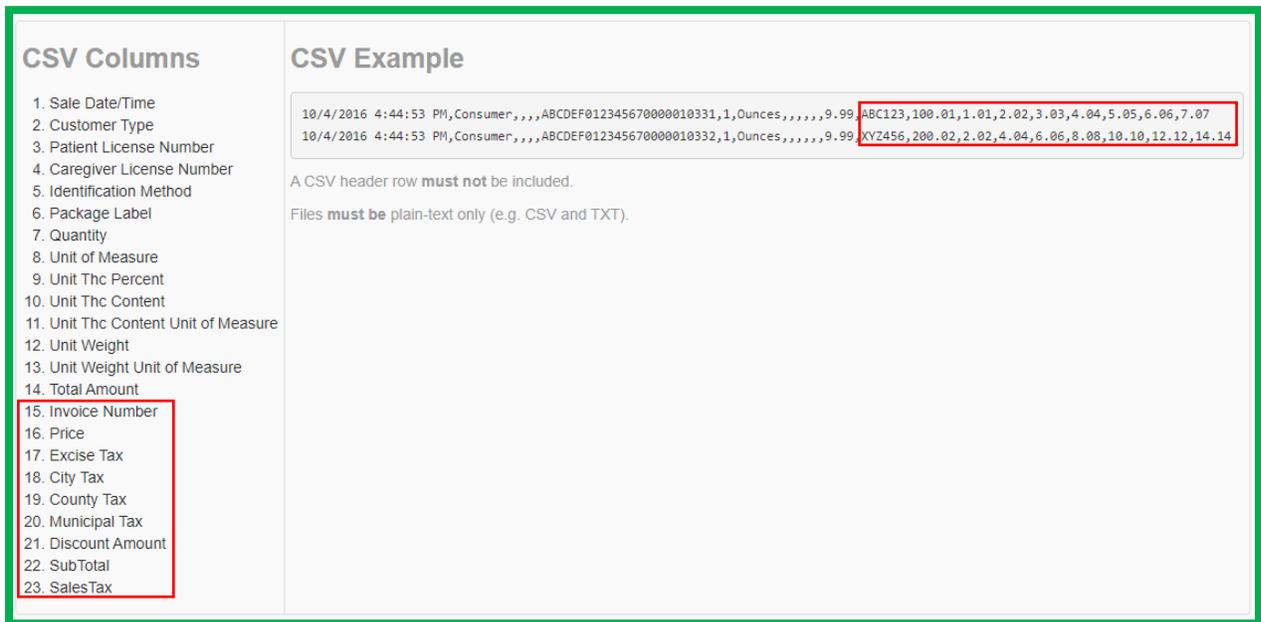

Figure 7: On-Page CSV Guide - New Sales Receipt Import

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.