Metrc Support Bulletin

Bulletin Number: MA_IB_0010	**Distribution Date**: 7/20/19	**Effective Date**: 7/20/19
Contact Point: Metrc® Support	**Subject**: New Features in Metrc	
Reason: Metrc is providing an update on our newest feature releases for the software.		

Greetings Metrc Users,

Metrc is pleased to provide information on our newest enhancements within the software. Users will have a new package permission to manage “Package Notes” within the packages grid. Metrc is also adding more columns and information within the Sales Receipt, Packages, and Transfers grids for all license types that have the respective grids.

Please find on the following pages a detailed description of the guidance and new functionality:

New Feature: Package Notes

Licensees will see a new permission available under the packages page for their employees. As seen in **Figure 1**, if a user is permitted to manage the “Notes” section, the user will then have the ability to create a note within any package in their facility. The note section is a free form field that is not a requirement when creating a new package as shown in the New Packages form in **Figure 2**. A package note can be viewed within the history tab pictured in **Figure 3**. The notes feature can be used at the user’s discretion to provide further detail about a specific package within a licensee’s inventory.

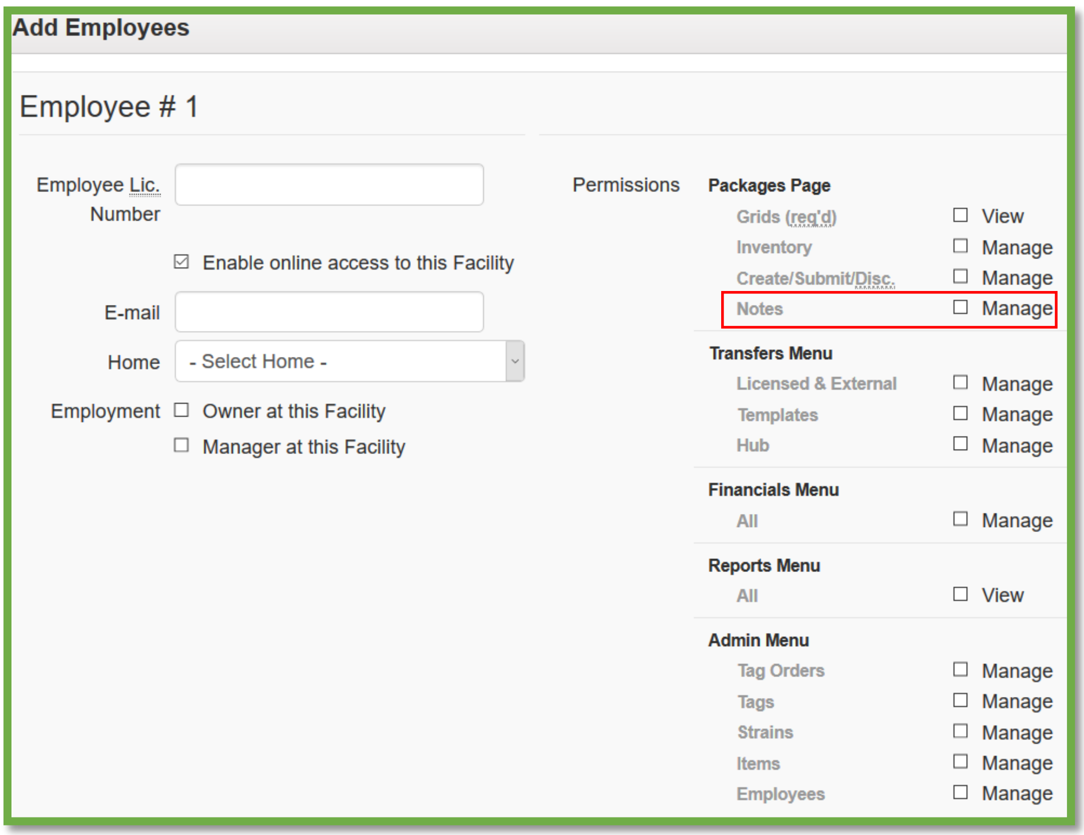


Figure 1: New Employee Permission for Package Notes

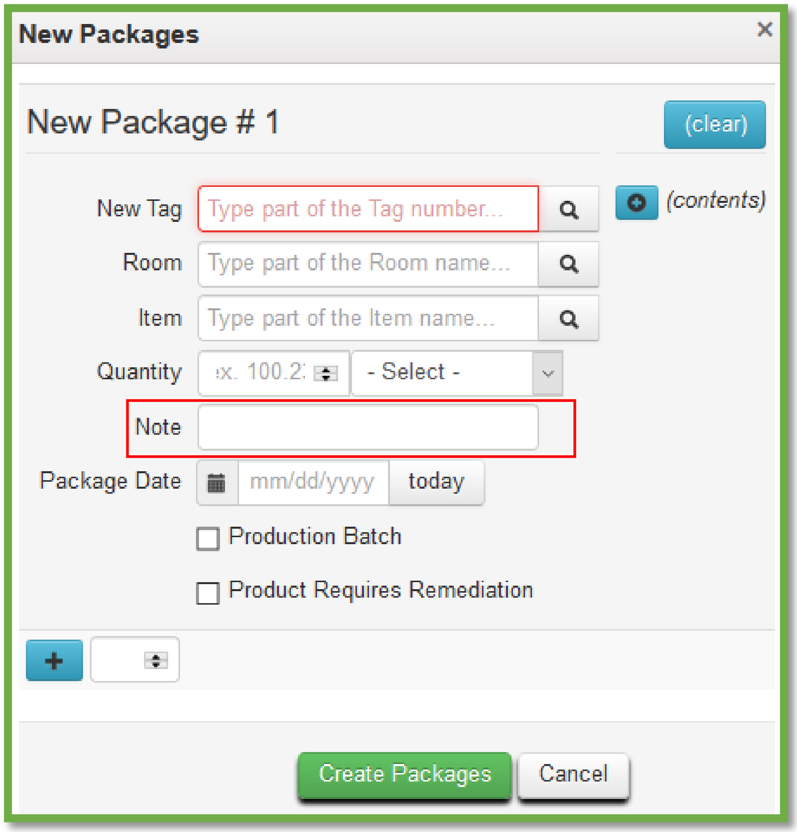


Figure 2: New Package Form

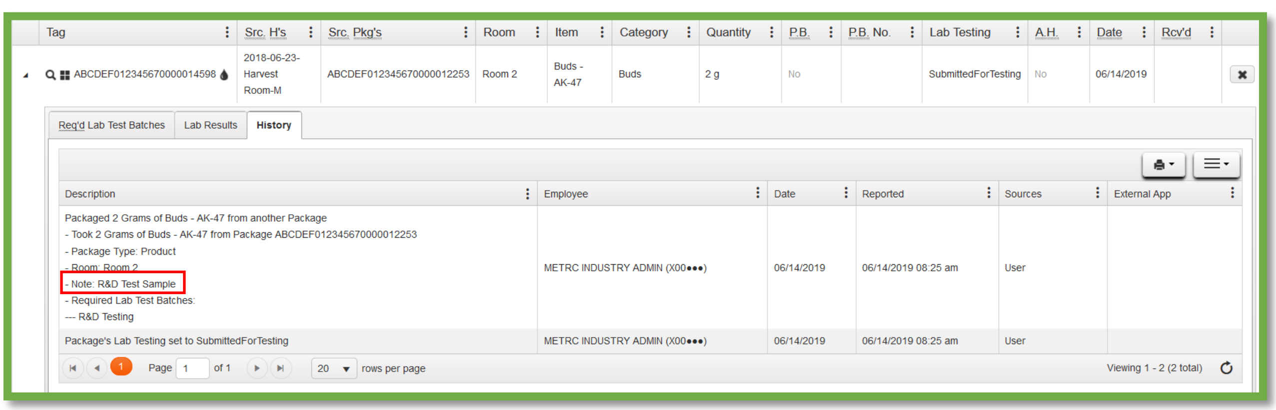


Figure 3: Package History

New Feature: Change Package Notes

If a package has been created without a note, or a licensee would like to update a previously created note, they can use the Change Notes button as seen in **Figure 4**. The button will trigger the action window seen within **Figure 5** where a licensee can enter a new note. All updates to package notes will be captured within the package's history tab in **Figure 6**.

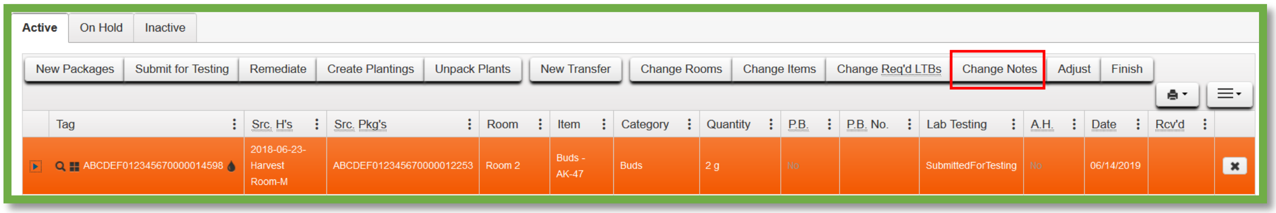


Figure 4: Packages Change Notes

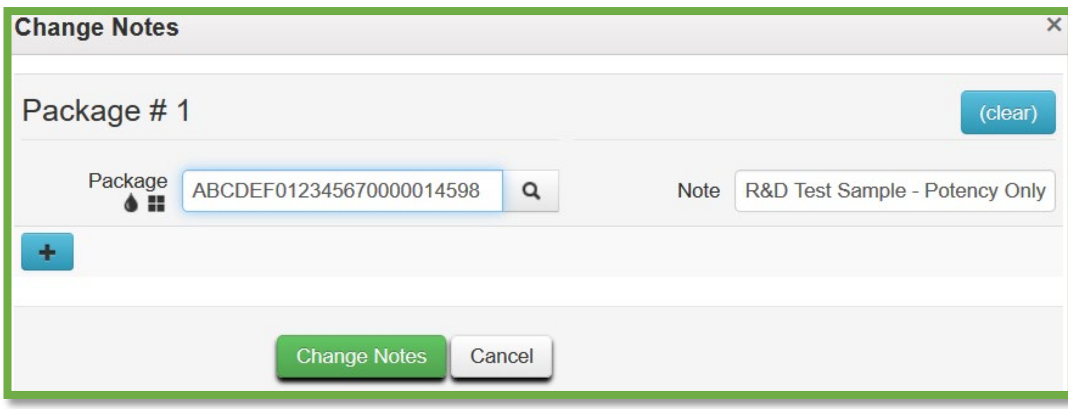


Figure 5: Change Package Notes

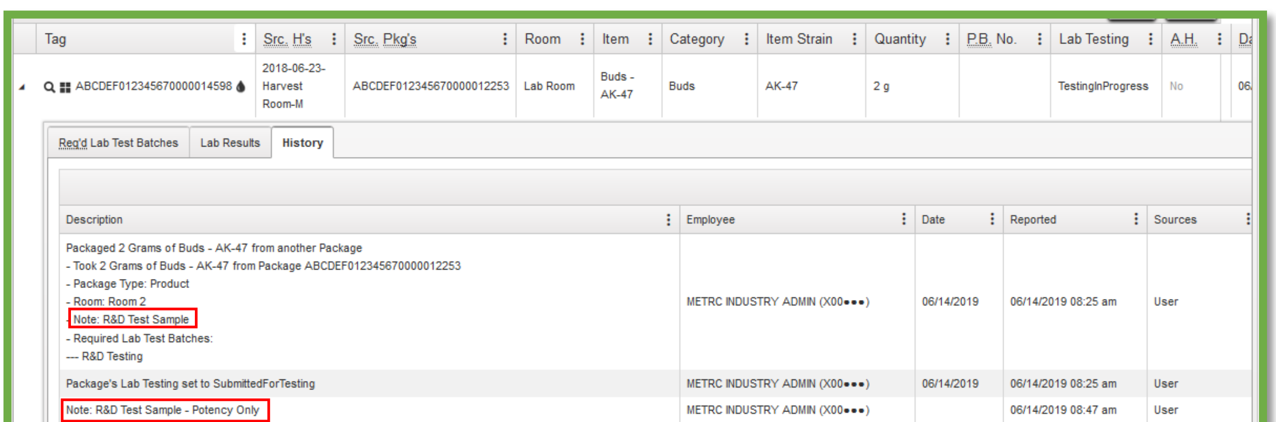
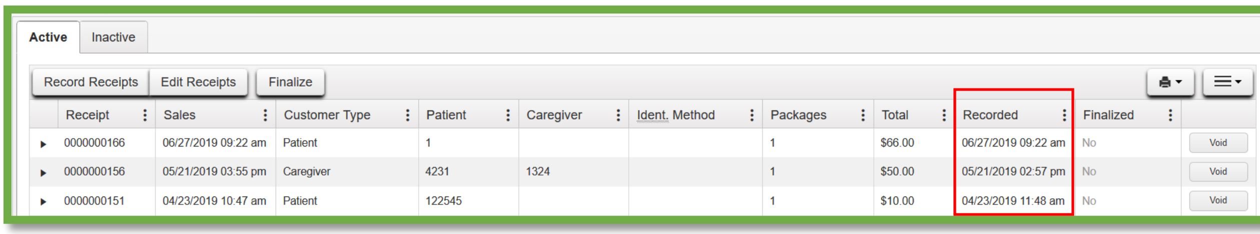


Figure 6: Package History

New Column: Recorded Sales

The Sales Receipts grid now includes a 'Recorded' column representing the ***actual*** date/time the entry was created. As a reminder, licensees can enter data into Metrc three ways (Manual, CSV, or API) and the recorded column represents the time Metrc receives the information from any of those entry sources.



Active | Inactive

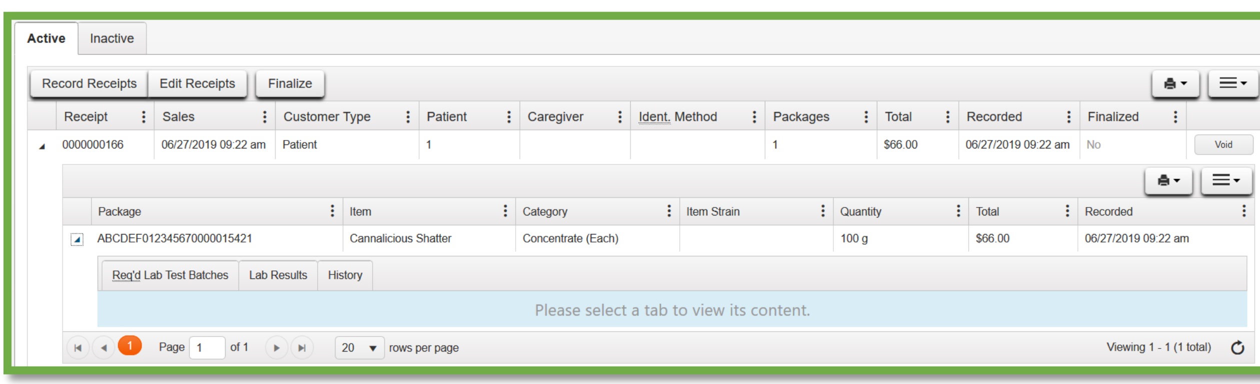
Record Receipts | Edit Receipts | Finalize

	Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized	
▸	0000000166	06/27/2019 09:22 am	Patient	1			1	$66.00	06/27/2019 09:22 am	No	Void
▸	0000000156	05/21/2019 03:55 pm	Caregiver	4231	1324		1	$50.00	05/21/2019 02:57 pm	No	Void
▸	0000000151	04/23/2019 10:47 am	Patient	122545			1	$10.00	04/23/2019 11:48 am	No	Void

Figure 7: Recorded Sales Receipts

Additional Information: Sales Receipts

The Sales Receipts grid now captures additional information for each package sold to a patient. When a user selects the drill-down arrow next to any package on a sales receipt they will now be able to reference the Required Lab Test Batches, Lab Results, and History for the package.



Active | Inactive

Record Receipts | Edit Receipts | Finalize

	Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized	
◢	0000000166	06/27/2019 09:22 am	Patient	1			1	$66.00	06/27/2019 09:22 am	No	Void

	Package	Item	Category	Item Strain	Quantity	Total	Recorded
◢	ABCDEF012345670000015421	Cannalicious Shatter	Concentrate (Each)		100 g	$66.00	06/27/2019 09:22 am

Req'd Lab Test Batches | Lab Results | History

Please select a tab to view its content.

1 Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)

Figure 8: Additional Package Information

New Columns: Item Information

Users will now see additional columns outlined in **Figure 9** available within the packages, transfers, and sales grid for item specific fields that are related to the package.

As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.

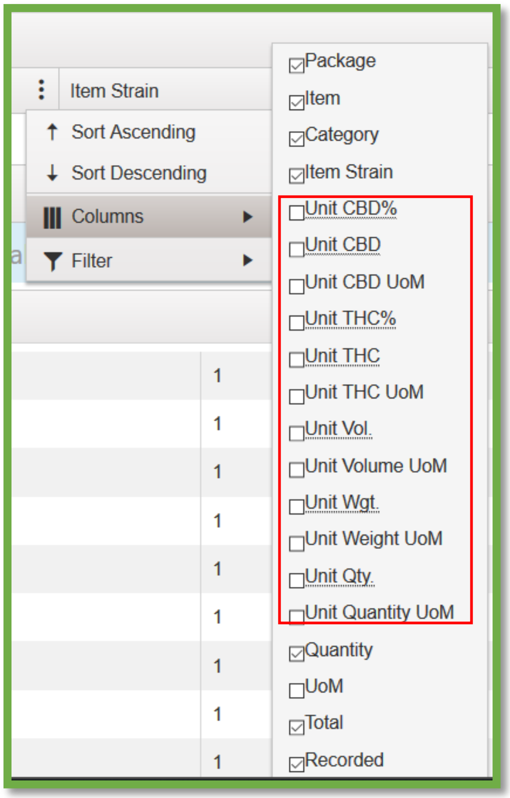


Figure 9: New Available Columns for Item Information

Additional Information: Sales Receipts

Users will now see additional information in **Figure 10** available when hovering over the magnifying glass of any package within their packages inventory or on an incoming transfer. This information is directly tied to the item created by the original licensee who created the package in Metrc.

As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.

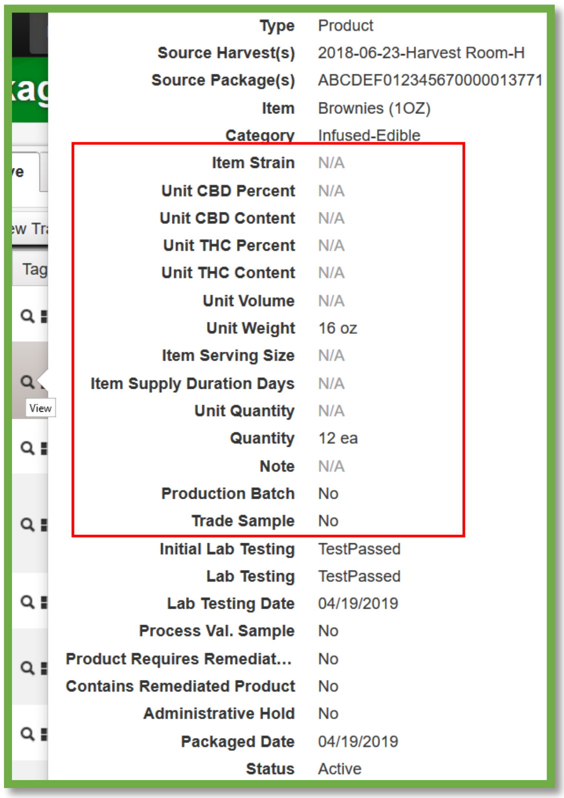


Figure 10: New Available Columns for Item Information

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