

August 12, 2019

Greetings Metrc Users,

Metrc is pleased to provide information on our most recent enhancements within the software, along with some reminders on best practice guidance for working within the software.

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

New Button: Discontinue Harvest Waste

Users with plant permissions will now have the ability to take corrective action on incorrect harvest waste entries by discontinuing the waste back into the harvest batch.

When drilling down into a harvest batch, users can now toggle to the Waste tab and find a new  button icon next to each entry of waste recorded as seen in **Figure 1**. Once the discontinue button is selected, a confirmation box **Figure 2** will populate for the user to confirm the action.

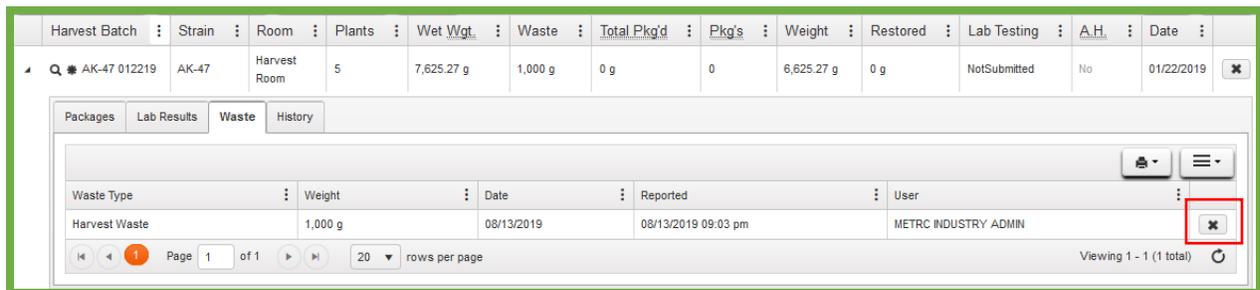


Figure 1: Discontinuing Harvest Waste

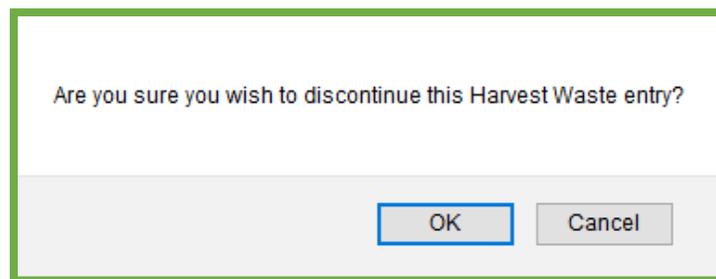


Figure 2: Confirming Discontinuation of Harvest Waste

Additional Information: Transfer Manifests

When registering and receiving transfers, users will now see that the Transfer Manifest will capture additional information within the manifest. Each package transferred will now include the item details (Strain, Unit Weight, Unit THC Content, etc.), source harvest, and source package information

Package # 1	Production Batch No.	Item Name	Quantity
ABCDEF012345670000015892 Lab Test: TestPassed Status: Accepted		Buds (Buds)	Shp: 300.0000 g Rcv: 300.0000 g GWT: 5025.0000 g
Item Details	Strain: Kayote Blu		
Source Harvest(s)	Kayote Blu Harvest 6/3		
Source Package(s)	ABCDEF012345670000015891		

Figure 3: Additional Details on Transfer Manifest

System Restrictions: CSV Row Count

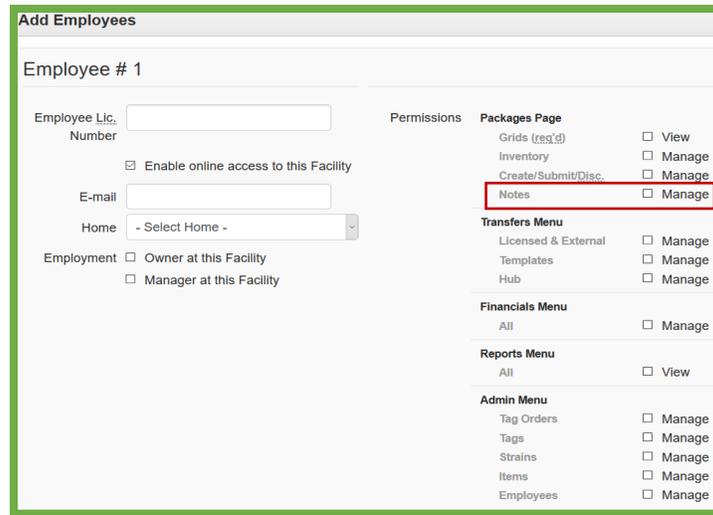
Metrc processes all records in a CSV file as a single upload transaction. Before storing any data, Metrc reviews each record to make sure there are no errors (such as a data type mismatch or the wrong number of values). If any record in the file generates an error, the upload is rejected. Metrc will report each error and the row on which it occurred. The user must then modify the CSV file and retry.

With this information in mind, Metrc has implemented a restriction of 500 rows maximum in CSV file uploads into the system. The exception made at this time will be for lab test results. There is currently no maximum limit set for the lab results being uploaded via the CSV import.

This limitation applies only to CSV imports and does not apply to data interfaced through API.

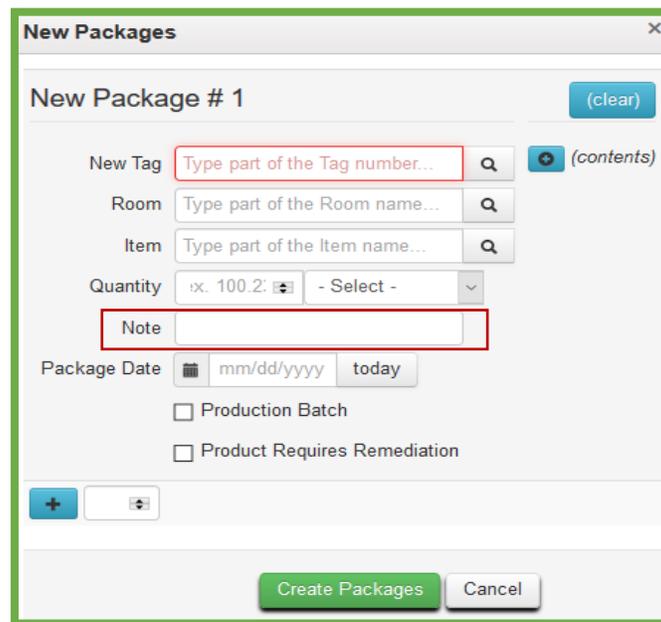
New Feature: Package Notes

Licensees have a permission available under the packages page for their employees. As seen in **Figure 4**, 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 5**. A package note can be viewed within the history tab pictured in **Figure 6**. The notes feature can be used at the user’s discretion to provide further detail about a specific package within a licensee’s inventory.



The screenshot shows the 'Add Employees' form. Under the 'Permissions' section, there is a 'Packages Page' subsection. The 'Notes' option is checked, indicating that the user has permission to manage package notes. Other permissions include 'Grids (req'd)', 'Inventory', 'Create/Submit/Dis.', 'Transfers Menu', 'Financials Menu', 'Reports Menu', and 'Admin Menu'.

Figure 4: New Employee Permission for Package Notes



The screenshot shows the 'New Packages' form. The 'Note' field is highlighted with a red box, indicating it is a required field for creating a new package. Other fields include 'New Tag', 'Room', 'Item', 'Quantity', 'Package Date', and checkboxes for 'Production Batch' and 'Product Requires Remediation'.

Figure 5: New Package Form

Description	Employee	Date	Reported	Sources	External App
Package 2 Grams of Buds - AK-47 from another Package - Took 2 Grams of Buds - AK-47 from Package ABCDEF012345670000012253 - Package Type: Product - Room: Room 2 Note: R&D Test Sample - Required Lab Test Batches --- R&D Testing	METRC INDUSTRY ADMIN (X00***)	06/14/2019	06/14/2019 08:25 am	User	
Package's Lab Testing set to SubmittedForTesting	METRC INDUSTRY ADMIN (X00***)	06/14/2019	06/14/2019 08:25 am	User	

Figure 6: 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 7**. The button will trigger the action window seen within **Figure 8** where a licensee can enter a new note. All updates to package notes will be captured within the package’s history tab in **Figure 9**.

Active On Hold Inactive

New Packages Submit for Testing Remediate Create Plantings Unpack Plants New Transfer Change Rooms Change Items Change Req'd LTBS **Change Notes** Adjust Finish

Tag	Src. H's	Src. Pkg's	Room	Item	Category	Quantity	P.B.	P.B. No.	Lab Testing	A.H.	Date	Rcv'd
ABCDEF012345670000014598	2018-06-23-Harvest Room-M	ABCDEF012345670000012253	Room 2	Buds - AK-47	Buds	2 g	No		SubmittedForTesting	No	06/14/2019	

Figure 7: Packages Change Notes

Change Notes

Package # 1 (clear)

Package ABCDEF012345670000014598 Note R&D Test Sample - Potency Only

Change Notes Cancel

Figure 8: Change Package Notes

Tag	Src. H's	Src. Pkg's	Room	Item	Category	Item Strain	Quantity	P.B. No.	Lab Testing	A.H.	D.
ABCDEF012345670000014598	2018-06-23-Harvest Room-M	ABCDEF012345670000012253	Lab Room	Buds - AK-47	Buds	AK-47	2 g		TestingInProgress	No	06/14/2019

Description	Employee	Date	Reported	Sources
Packaged 2 Grams of Buds - AK-47 from another Package - Took 2 Grams of Buds - AK-47 from Package ABCDEF012345670000012253 - Package Type: Product - Room: Room 2 - Note: R&D Test Sample - Required Lab Test Batches --- R&D Testing	METRC INDUSTRY ADMIN (X00●●●)	06/14/2019	06/14/2019 08:25 am	User
Package's Lab Testing set to SubmittedForTesting	METRC INDUSTRY ADMIN (X00●●●)	06/14/2019	06/14/2019 08:25 am	User
Note: R&D Test Sample - Potency Only	METRC INDUSTRY ADMIN (X00●●●)	06/14/2019	06/14/2019 08:47 am	User

Figure 9: 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.

Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized	Void
▶ 000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No	Void
▶ 000000156	05/21/2019 03:55 pm	Caregiver	4231	1324		1	\$50.00	05/21/2019 02:57 pm	No	Void
▶ 000000151	04/23/2019 10:47 am	Patient	122545			1	\$10.00	04/23/2019 11:48 am	No	Void

Figure 10: 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.

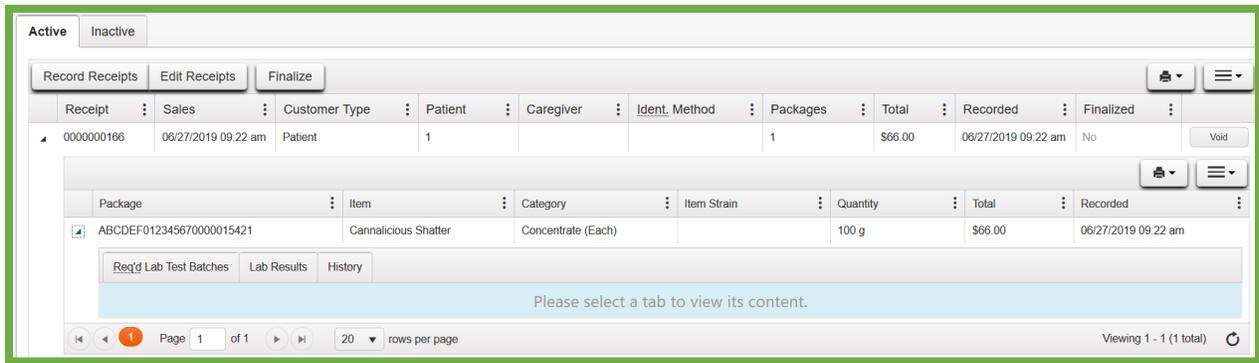


Figure 11: Additional Package Information

New Columns: Item Information

Users will now see additional columns outlined in **Figure 12** 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.

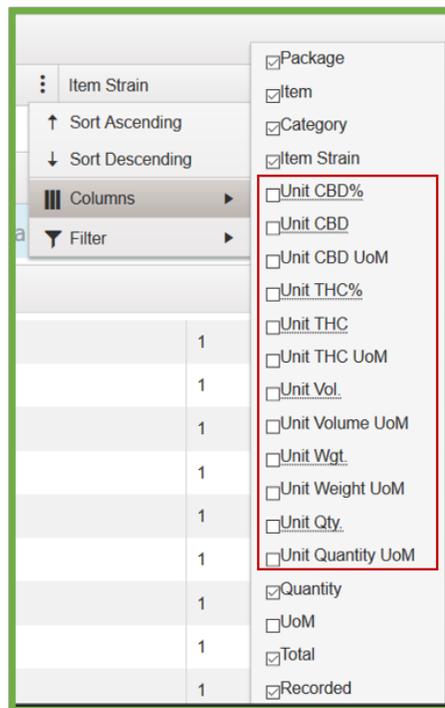
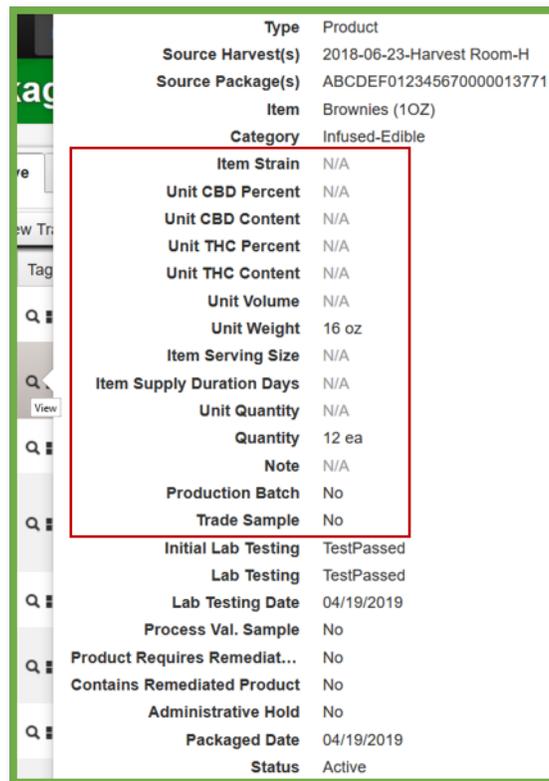


Figure 12: New Available Columns for Item Information

Additional Information: Sales Receipts

Users will now see additional information in **Figure 13** 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.



Type	Product
Source Harvest(s)	2018-06-23-Harvest Room-H
Source Package(s)	ABCDEF012345670000013771
Item	Brownies (1OZ)
Category	Infused-Edible
Item Strain	N/A
Unit CBD Percent	N/A
Unit CBD Content	N/A
Unit THC Percent	N/A
Unit THC Content	N/A
Unit Volume	N/A
Unit Weight	16 oz
Item Serving Size	N/A
Item Supply Duration Days	N/A
Unit Quantity	N/A
Quantity	12 ea
Note	N/A
Production Batch	No
Trade Sample	No
Initial Lab Testing	TestPassed
Lab Testing	TestPassed
Lab Testing Date	04/19/2019
Process Val. Sample	No
Product Requires Remediat...	No
Contains Remediated Product	No
Administrative Hold	No
Packaged Date	04/19/2019
Status	Active

Figure 13: New Available Columns for Item Information

Edit Strains

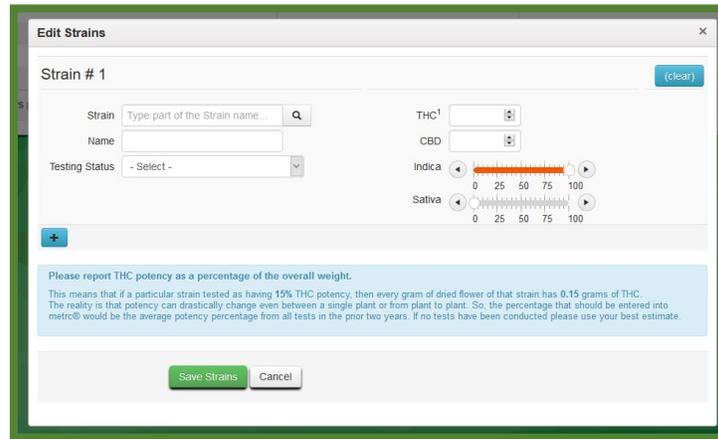
The Edit Strains and Edit Items sections of Metrc have been updated to prevent the ability to modify the name of a Strain/Item once it has been used. Users with plants permissions will now have a change strains button to take corrective action on a plant if it was incorrectly identified under a different strain.

Any user with plants permissions will now be able to see two new columns for Group and Group Type within their Vegetative and Flowering grids. All users with packages permissions will now have a Source

Package column within their Packages grid. Please see the sections below for detailed descriptions of these changes.

Please note that if the following has **not** occurred, then strains will still be available to edit:

- A strain name has not been associated to an Immature Plant Batch or Veg/Flowering plant



Edit Strains

Strain # 1 (clear)

Strain: Type part of the Strain name...

Name:

Testing Status: - Select -

THC%:

CBD:

Indica:

Sativa:

Please report THC potency as a percentage of the overall weight.
This means that if a particular strain tested as having 15% THC potency, then every gram of dried flower of that strain has 0.15 grams of THC. The reality is that potency can drastically change even between a single plant or from plant to plant. So, the percentage that should be entered into metrc® would be the average potency percentage from all tests in the prior two years. If no tests have been conducted please use your best estimate.

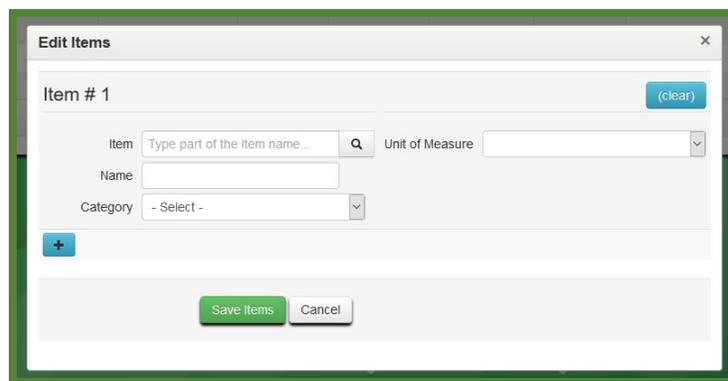
Save Strains Cancel

**** If the strain has been used, the Name field would be restricted. Also, upon selecting Save Strains the user would receive an error. Other fields within the strain can be edited.**

Edit Items

Please note that if the following has **not** occurred, then items will still be available to edit:

- The item has not been previously used in a package
- The item has not been finished or discontinued



Edit Items

Item # 1 (clear)

Item: Type part of the Item name... Unit of Measure:

Name:

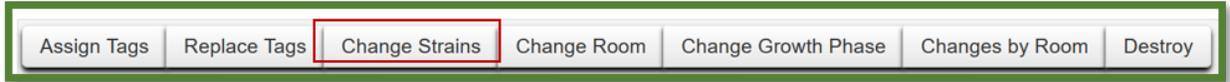
Category: - Select -

Save Items Cancel

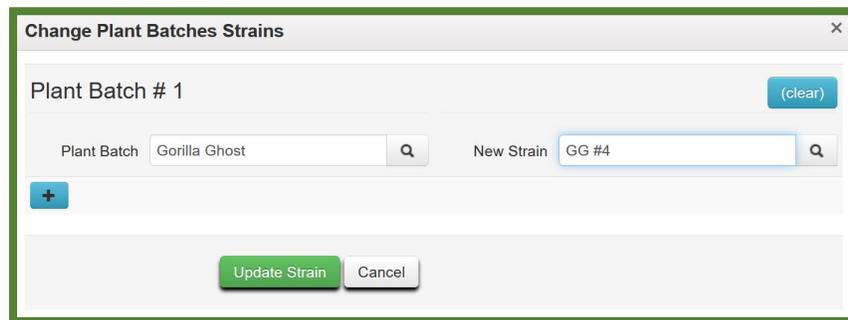
**** If the item has been used, the Name field would be restricted. Also, upon selecting Save Items the user would receive an error. Other required fields within the item can be edited.**

Changing Strains

If a user identifies that an incorrect strain was designated to an Immature Plant Batch or a Vegetative/Flowering Plant, they can select the Change Strain button.

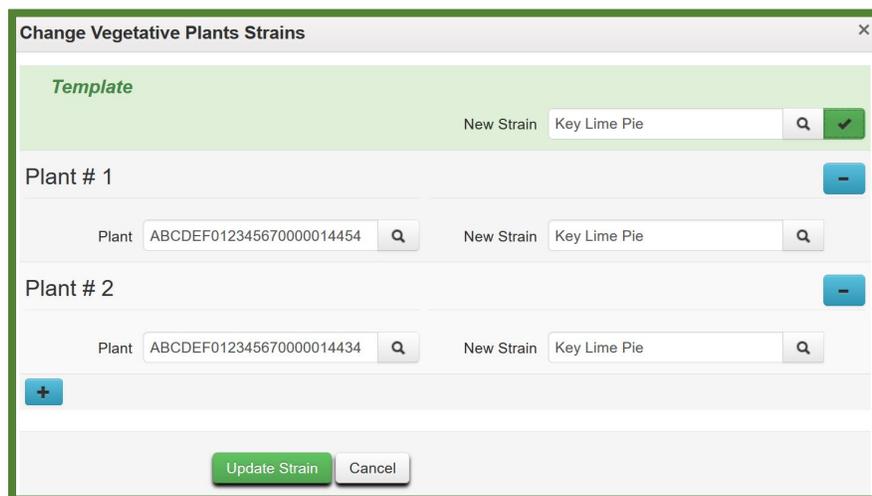


For Plant Batches, the user will be able to update the strain for the plant batch that was identified as incorrect. The "New Strain" option will be the selectable list of active strains created within the license.



**** If some plants within the immature batch have been transitioned to a new growth phase, they will not be updated by the immature batch strain change.**

For Vegetative or Flowering Plant(s), the user will be able to select the plant(s) that were identified as incorrect. The "New Strain" option will be the selectable list of active strains within the license.



**** If multiple plants are selected, a template can be used.**

Group and Group Type Columns

Any user that has plant permissions will now see two additional columns within their Vegetative and Flowering grids. The Group column will indicate the Immature Plant Group that specific plant came from. The Group Type column will indicate whether the plant came from a seed or clone, which is designated during the immature planting section of Metrc.

Tag	Strain	Room	Hold	Group	Group Type	Group Date
▶ ABCDEF012345670000010002	AK-47	Veg Room B	No	AK-47 Clone 1/20/2017	Clone	01/20/2017

Source Package Column

Any user that has package permissions will now see an additional column within their Packages grid. The Source Package column will indicate to the user which package tag was used to create the current package. If multiple packages went into the creation of a new package, then the user will see (multi-package) opposed to a single tag. If a package wasn't created from another package, the area will be blank.

Tag	Harvest	Source Package
▶ 🔍 ABCDEF012345670000012988	(multi-harvest)	(multi-package)
▶ 🔍 ABCDEF012345670000012987	Flo 6-11-2018	ABCDEF012345670000012971
▶ 🔍 ABCDEF012345670000012985	Blue Dream 013119	

Guidance Reminders

Combining Packages

Previous Software/Program Updates sent on **May 21, 2015** and **July 24, 2015** addressed the practice of combining packages. Here is a summary of things a Licensee should be aware of if the Licensee chooses to combine packages:

- Packages may be combined as long as they are strain specific when it is bud/trim **OR** item specific for concentrates, edibles, and non-edible products.
- If you maintain a combined package for an extended period of time and continue to repackage new and existing products into one package tag, you should understand there are several risks involved including, but not limited to, the following:
 - Accurate and transparent tracking of the actual product included under the combined tag is more difficult given the extended period of time and variety of batches included.
 - There is a risk of leaving product unaccounted for if the packages are not properly combined.
 - It is more difficult to ensure the correct harvest/production batch and test results (when applicable) are on the label at the point of sale.

Finally, the Licensee that combines packages is at significant risk of having non-contaminated product placed on hold as a result of combining it with contaminated product under a single Metrc tag when a Health and Safety Advisory or recall is issued.

Sales Receipt Finalize and Unfinalize Buttons

Metrc would like to offer further advise on Finalizing Sales receipts. **Receipts should be finalized up to the last week.** Finalizing your receipts will speed up the sales receipts area and help with editing times for receipts. You may finalize multiple receipts at a time.

Finalize and Unfinalize. A new Finalized column (filterable) has been added to the Sales Receipt grid as well.



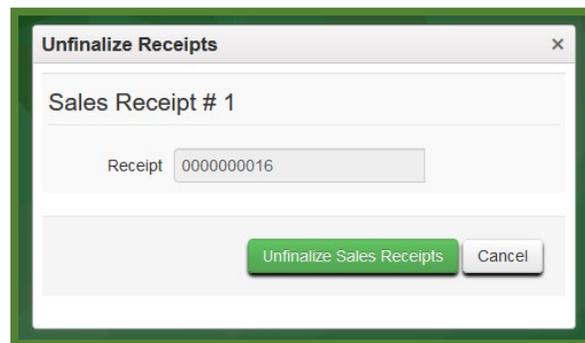
When a receipt is no longer active, select the receipt and click the Finalize button. The following window will appear. Verify the receipt number and click the “Finalize Sales Receipts” button. **Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing. Larger stores may want to Finalize older Sales Receipts at a faster pace (e.g. on a weekly basis).**



This will remove the receipt from the list of current receipts Metric pulls when you edit receipts.

Note: Only those receipts not marked as “finalized” will display in the edit receipts window.

If a “finalized” receipt later needs to be edited, utilize the Unfinalize button on the Sales Receipts grid. Select the desired receipt and click the Unfinalize button. The following window will appear. Verify the receipt number and click the “Unfinalize Sales Receipts” button.



Please feel free to email support@metric.com or call 877-566-6506 with any questions.