Metrc Support Bulletin

Subject: Upcoming Feature Release	
Bulletin Type	Primary Audience: All Licensees
☒ New Functionality	Contact**:** Metrc Support
☒ Updated Functionality	Distribution Date: 08/02/2021
☐ Existing Functionality	Effective Date: 08/16/2021
☐ Rules & Guidance	Bulletin Number: CA_IB_2021_005
☐ Events	
☒ Informational	

This bulletin provides information on the latest enhancements to Metrc, which are listed below and will become effective on 08/16/2021.

    I.   Managing Transporter Drivers and Vehicles under the Admin Menu (New Feature)

   II.   Production Management Report for Cultivators (New Feature)

 III.   Packages Inventory Report (Update)

 IV.   Sales CSV File Guidelines (Update)

  V.   User Guide Updates

Descriptions of these upcoming enhancements are provided on the following pages.

In addition, a fix for an issue preventing CSV exports from the *Reports Control Panel* will also be included in this release.

I. Managing Transporter Drivers and Vehicles under the Admin Menu (New Feature)

Transporter driver and vehicle information can now be added, edited and removed using the new *Transporters* option on the *Admin* area. The information managed here can be used to populate driver and vehicle information when creating and editing transfer manifests, replacing the lookup functionality which shows a 90-day window of previously entered driver and vehicle information.

Select the *Transporter* option under the *Admin* menu to access the new *Transportation* page. This step is shown in **Figure 1** below.
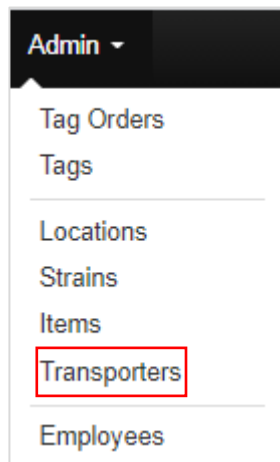

Figure 1: Transporter Option on Admin Menu

Please Note: If you do not see the *Transporters* option, you do not have the requisite employee permission. If access to this feature is necessary to perform your job duties, please contact the admin for your license to request access.

From the *Transportation* page, select the *Add Drivers* button on the *Drivers* tab to create a new entry. This step is demonstrated in **Figure 2** below.
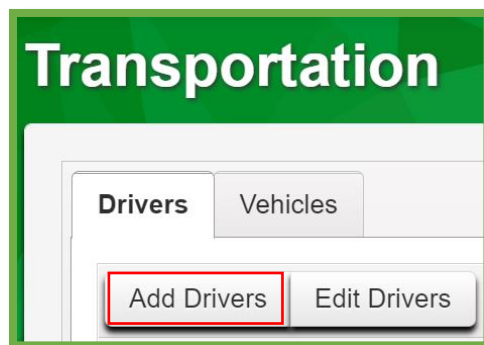

Figure 2: Add Drivers Button

On the *Add Drivers* action window, enter the driver information and click the *Save Drivers* button. This step is shown in **Figure 3** below**.**
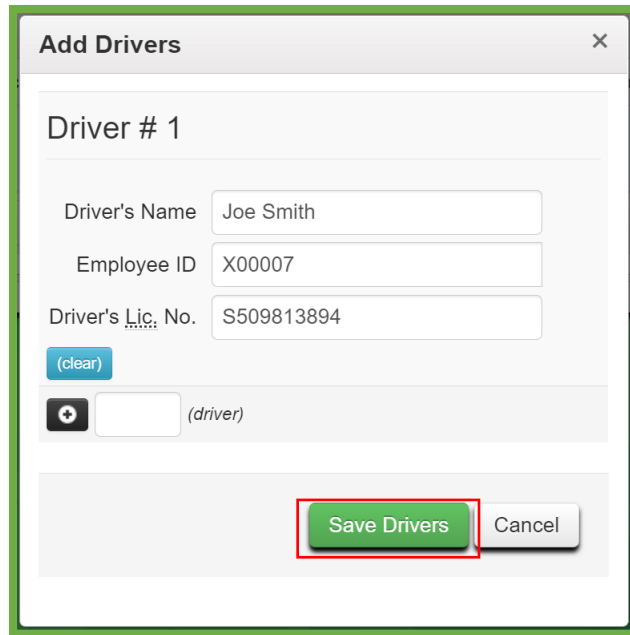

Figure 3: Add Drivers Action Window

To save vehicle information the process above is repeated under the *Vehicles* tab, as demonstrated in **Figure 4** and **Figure 5** below.
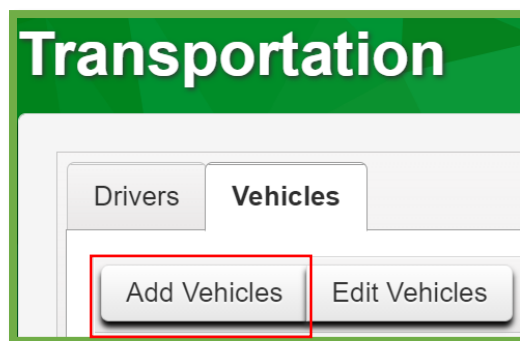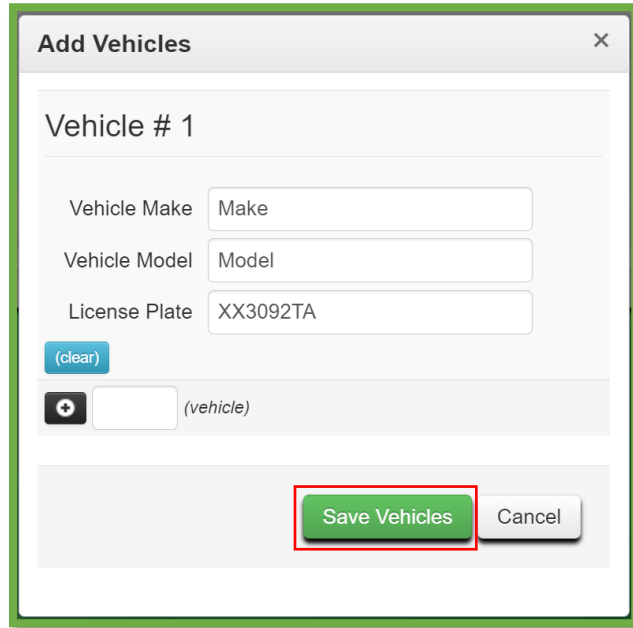

Figure 4: Add Vehicles Button

Figure 5: Add Vehicles Action Window

II. Production Management Report for Cultivators

(New Feature)

Cultivators and microbusinesses, authorized to perform cultivation activities, will have access to a new *Production Management Report*. The *Production Management Report* provides the following data points for a given date range (no longer than six months):

- Max Plants – *Maximum Number of Plants During Time Period*
- Average Plants – *Average Number of Plants in Veg/Flowering During Time Period*
- Percentage of Max Plants – *Average Number of Plants During Time Period Divided by Max Plants*
- Harvested Weight Packaged – *Total Weight Packaged from Harvest During Time Period*
- Harvested Weight Transferred – *Total Weight Transferred during Time Period*
- Percentage of Harvested Weight Transferred – *Total Weight Transferred Divided by Total Weight Packaged from Transfer During Time Period*

Please Note: Use of this report is entirely optional.

To access the *Production Management Report* page, select the *Production Management* option from the *Reports* menu. This step is demonstrated in **Figure 6** below.
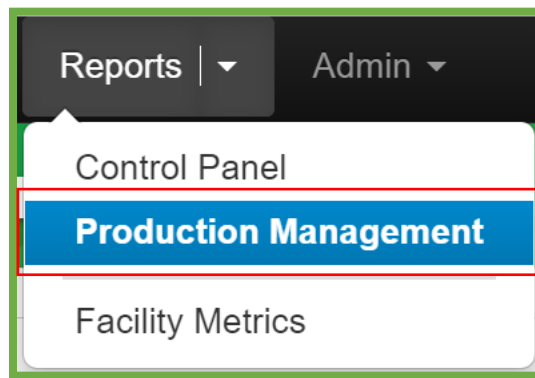

Figure 6: Navigate to the Production Management Report

Once on the *Production Management Report* page, select the *Pending* tab and use the *Request Report* button to initiate the process. This step is demonstrated below in **Figure 7**.
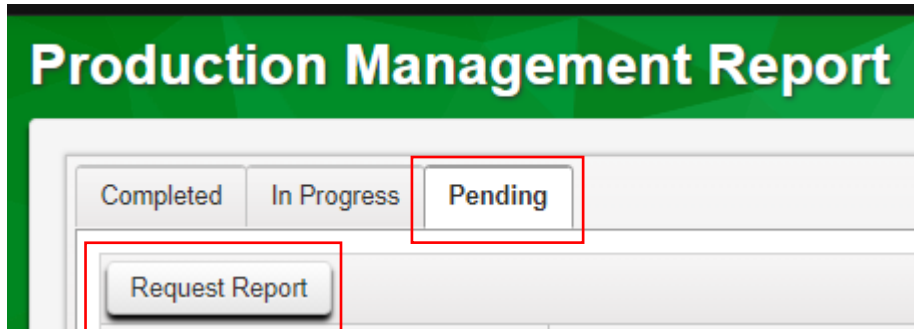

Figure 7: Pending Report Tab and Request Report Button

On the *Request Report* action window, select the date range for the report. The date range cannot exceed 180 days. This step is demonstrated in **Figure 8** below.
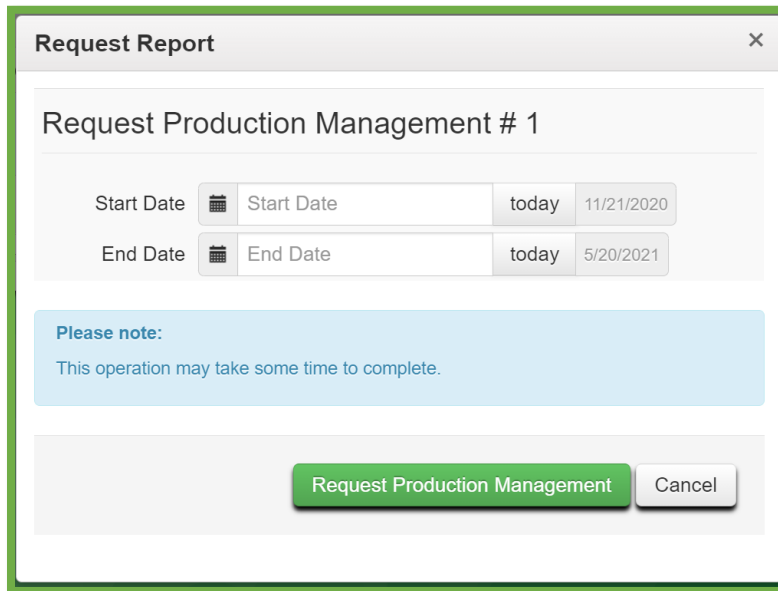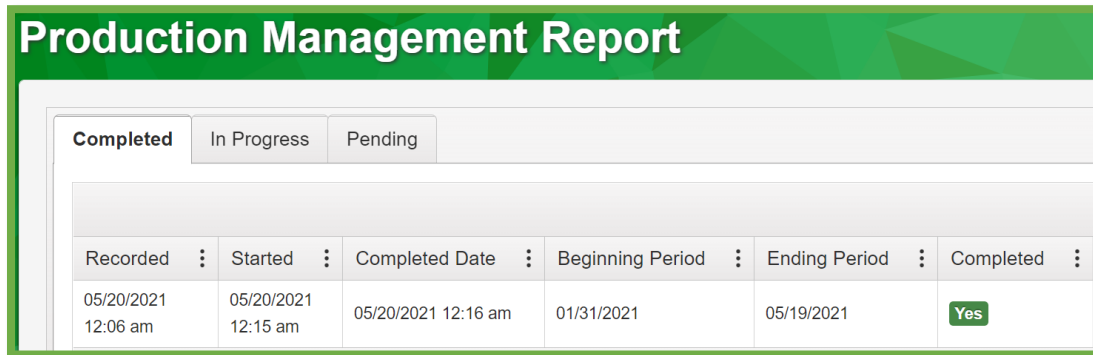

Figure 8: Request Production Management Report Action Window

The request remains on the *Pending* tab until the process to generate the report is initiated in the background. While the process is running in the background, the request displays on the *In Progress* tab. Once the process has completed, the report information will be made available under the *Completed* tab.
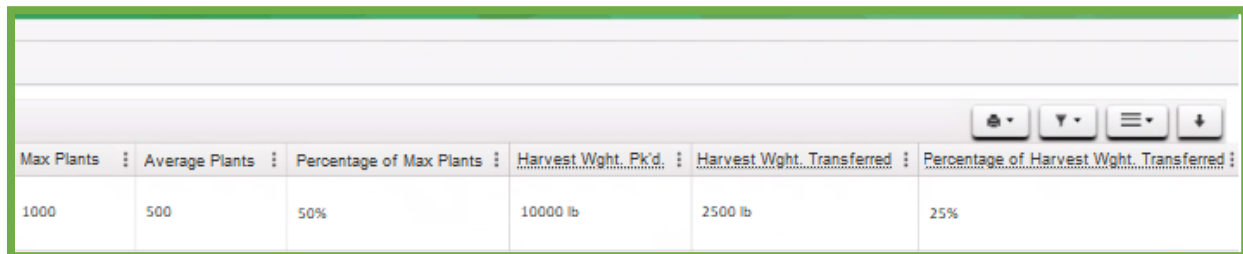
Figure 9 below shows the left-most columns on the *Completed* tab which provide information related to the report request.

Figure 9: Production Management Report Completed Tab

Figure 10 below shows the right-most columns on the *Completed* tab which provide the report data described at the beginning of this section.

Figure 10: Production Management Report Completed Tab – Report Details

III. Packages Inventory Report (Update)

The *Packages Inventory Report* has been updated to include a *Source Package* column.

To run the report, access the *Control Panel* from the *Reports* area. The *Reports Control Panel* for the *Packages Inventory Report* is shown below in **Figure 11**.
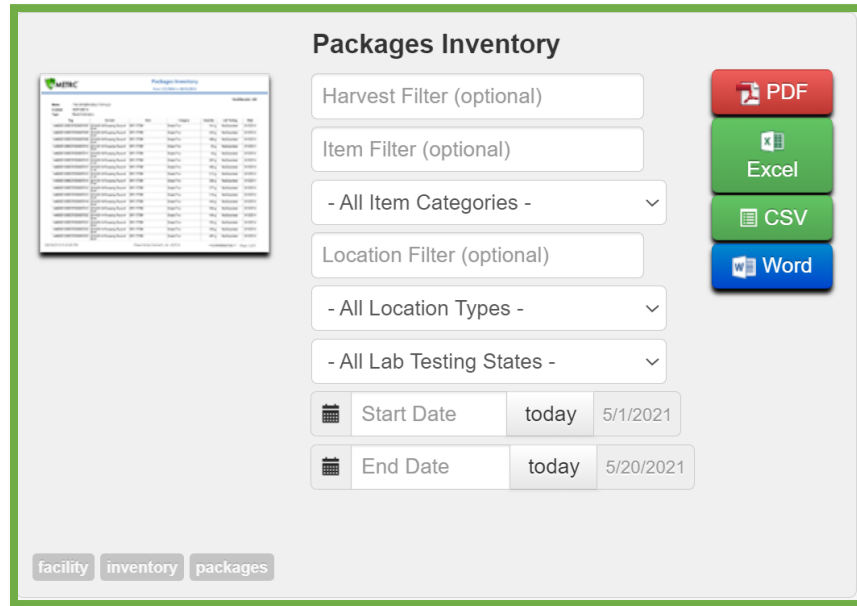

Figure 11: Reports Control Panel - Packages Inventory Report

Once run, the source package(s), if any, used in the making of the package is/are listed on the *Packages Inventory Report* as shown in **Figure 12** below.

Package	Harvest	Source Packages
1A4FF0300000E1A000000733	2020-07-20-Harvest Room C-H	
1A4FF0300000E1A000000710	2020-09-17-Harvest Room A-H	1A4FF0300000E1A000000708
1A4FF0300000E1A000000708	2020-09-17-Harvest Room A-H	1A4FF0300000E1A000000229, 1A4FF0300000E1A000000680

Figure 12: Source Package Field

IV: Sales CSV File Guidelines (Update)

A new column referenced as *Identification Method* will now need to be included in both the *Sales* (new) and *Sales (update)* CSV files. An *Identification Method* is a free form field used in other states to indicate how the retailer identified the individual making a purchase. An *Identification Method* is not required to be recorded in Metrc in California, so no data is required to be populated in this column.

The order of the columns for the *CSV Sales (new)* import are as follows:

1. Sale Date/Time
2. Customer Type
3. Patient License Number
4. Caregiver License Number
5. Identification Method
6. Package Label
7. Quantity
8. Unit of Measure
9. Total Amount

The order of the columns for the *CSV Sales (update)* import are as follows:

1. Sales Receipt No.
2. Sales Date/Time
3. Sales Customer Type
4. Patient License Number
5. Caregiver License Number
6. Identification Method
7. Package Label
8. Quantity
9. Unit of Measure
10. Total Amount

V: User Guide Updates

Updated user guides are available on the *Support* menu, as highlighted in **Figure 13** and described in the table below.

Figure 13: Support Menu – Updated Guides

Guide	Update Highlights
Industry Generic User Manual	• Added Discontinue Waste – Harvested section • Added Source Production Batch Information section
California Supplemental Guide	• Updated the Item Categories List to Match Current State Configuration • Updated the Adjustment Reason List to Match Current State Configuration • Modified the New/Edit Licensed Transfers Sections to Include Package CSV Upload Feature
CSV Formatting Guide	• Updated the format of the Split Plantings CSV
Industry Reports Guide	• Made guide available on the Support menu for the first time

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