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|--|---------------------------------------|-------------------------------|
| <b>Bulletin Number:</b> MA_IB_0044   | <b>Distribution Date:</b> 7/1/21      | <b>Effective Date:</b> 7/6/21 |
| <b>Contact Point:</b> Metrc® Support   | <b>Subject:</b> New Features in Metrc |                               |
| <b>Reason:</b> Metrc is providing an update on our upcoming feature release. |                                       |                               |

Greetings Metrc Users,

Metrc is pleased to provide information on our newest enhancements within the software. These enhancements, fixes, or document updates include:

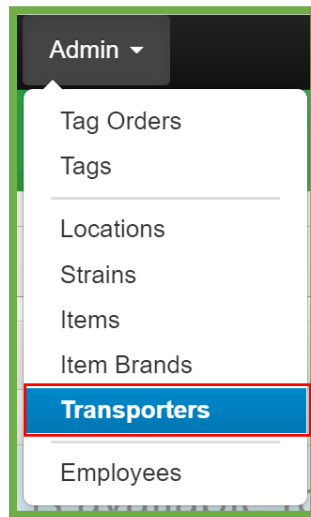
- I. Ability to manage saved drivers and vehicles under the Admin Menu
- II. The new Production Management report available for Cultivator licenses
- III. Source Package field for the Package Inventory report
- IV. Optional County field can be recorded on Sales Deliveries
- V. Fixed CSV Exports in Canned Reports
- VI. Fixed Package History on Sales Delivery Drilldown
- VII. Updated CSV Formatting Guidelines
- VIII. Updated Metrc General Manual
- IX. Added the Industry Bulletin Archive Link under the Support Tab

Please find on the following pages a detailed description of the enhancements:

## **Manage Drivers and Vehicles**

There is now the ability to manage the saved drivers and vehicle information under their admin menu. These saved drivers and vehicles can be used to populate those fields when creating transfer manifests.

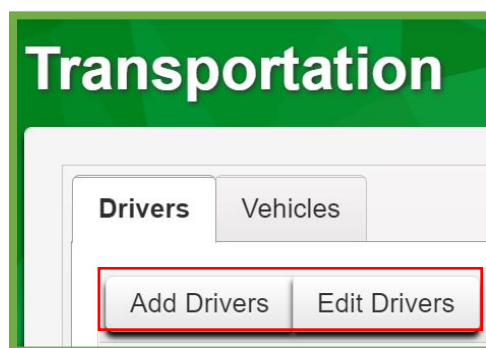
To navigate to this screen, select the Transporter option under the Admin menu. This step is show below in **Figure 1**.



**Figure 1: Admin Menu with Transporter Option**

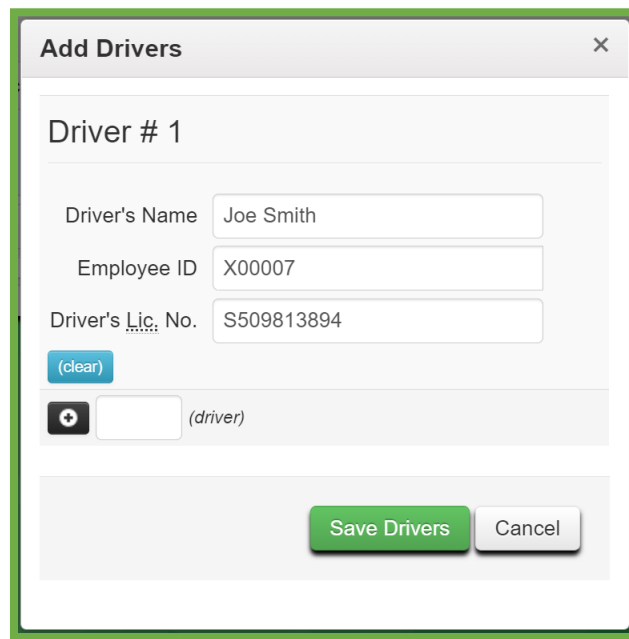
**Please Note:** If you do not see this option, you will need to be granted the permission under the employee admin menu.

Once on the Transporter screen, navigate to either the driver or vehicle tab and use the button to create the entry. This step is demonstrated below in **Figure 2**.



**Figure 2: Add Driver Button**

This button will trigger the action window to enter the driver's information. This step is demonstrated for drivers below in **Figure 3**.

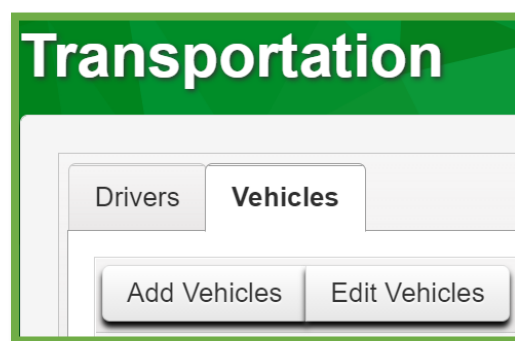


The "Add Drivers" window is a modal dialog box with a title bar containing the text "Add Drivers" and a close button (X). The main content area is titled "Driver # 1". It contains three text input fields: "Driver's Name" with the value "Joe Smith", "Employee ID" with the value "X00007", and "Driver's Lic. No." with the value "S509813894". Below these fields is a blue button labeled "(clear)". At the bottom left of the input area is a plus icon in a square, followed by a text input field and the label "(driver)". At the bottom right of the window are two buttons: a green "Save Drivers" button and a grey "Cancel" button.

**Figure 3: Add Driver Action Window**

Once the information is entered, save the driver to be used when creating transport manifests.

To save vehicle information this process is repeated under the Vehicle tab. This process is demonstrated below in **Figure 4** and **Figure 5**.



**Figure 4: Add and Edit Vehicle Buttons**

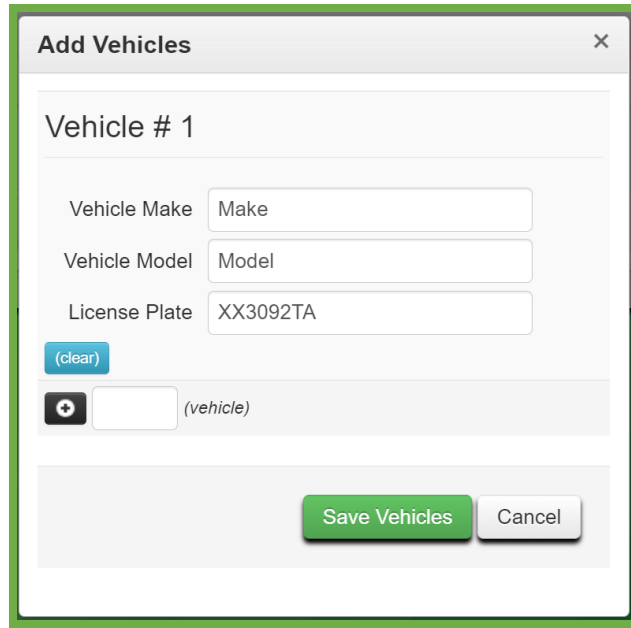


Figure 5: Add Vehicle Action Window

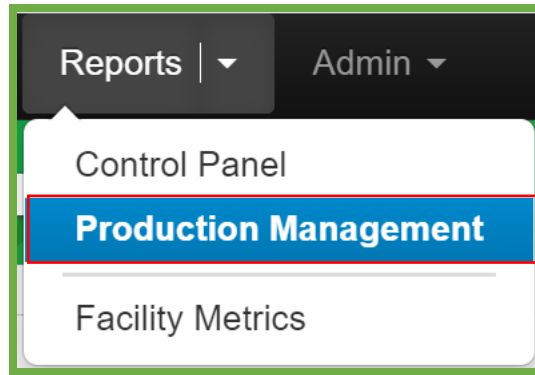
## Production Management Report

Cultivation licenses will now be able to run an advanced report that will provide the following data points over a given data 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*

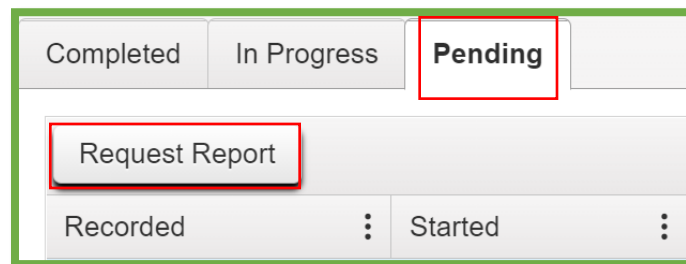
**Please Note:** This is intended to be an additional report to utilize and not one that is required to use at this time.

To navigate to the Production Management Report screen, select the option under the Reports menu. This step is demonstrated below in **Figure 6**.



**Figure 6: Navigate to the Production Management Report**

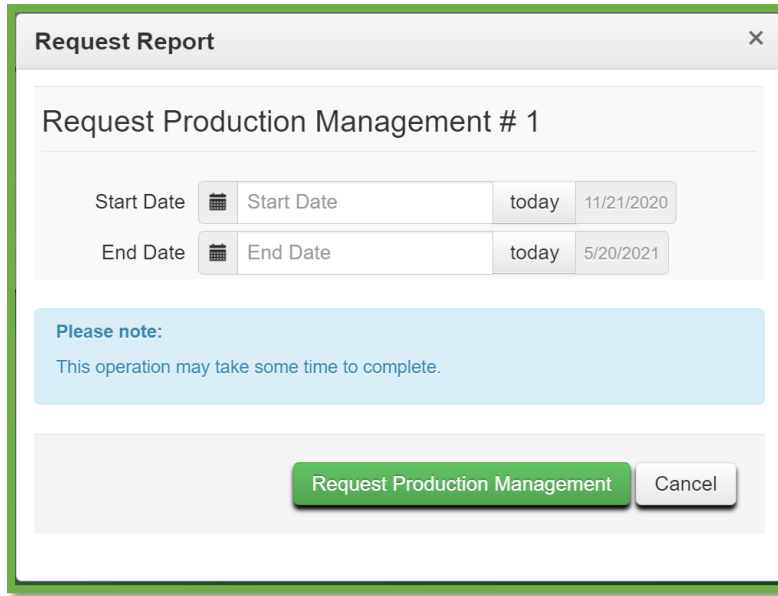
Once on the Production Management Report screen, select the Pending tab and use the “Request Report” button to initiate the process. This step is demonstrated below in **Figure 7**.



**Figure 7: Pending Report Tab and Request Report Button**

This button will initiate an action window to select the date range of the report. This step is demonstrated in **Figure 8** below.

**Note:** The date range must be less than 180 days, or the report will not run.



**Request Report** [X]

Request Production Management # 1

Start Date [calendar icon] Start Date [today] 11/21/2020

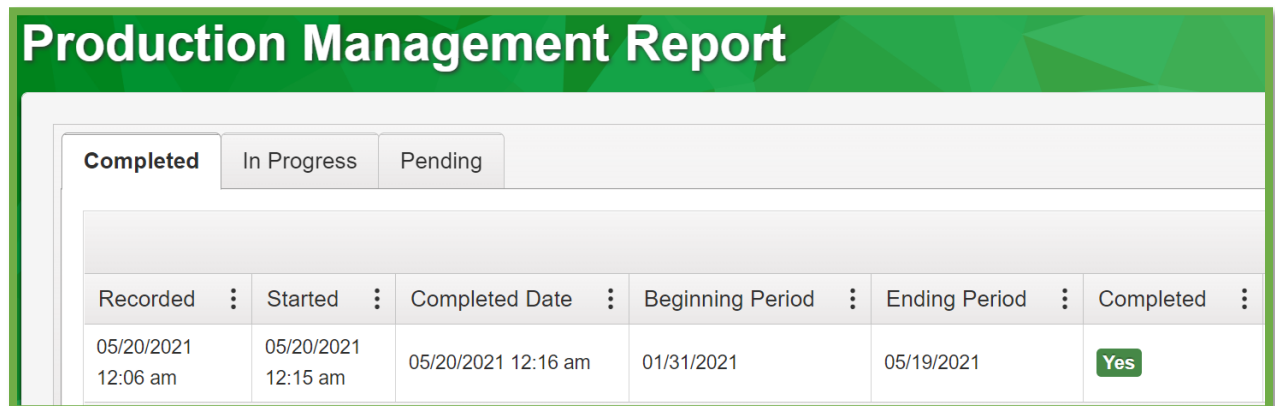
End Date [calendar icon] End Date [today] 5/20/2021

**Please note:**  
This operation may take some time to complete.

[Request Production Management] [Cancel]

**Figure 8: Request Production Report Action Window**

The request will remain under the Pending tab until it is moved to the In Progress Tab. Once completed all the information will be made available under the Complete tab. This step is demonstrated in **Figure 9** below.

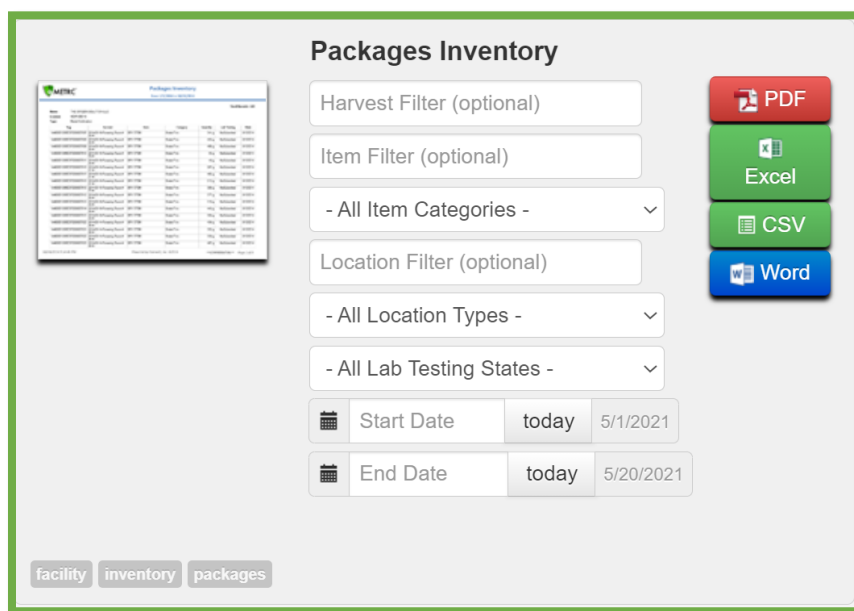


| Production Management Report  |                        |                     |                  |               |           |
|-------------------------------|------------------------|---------------------|------------------|---------------|-----------|
| Completed In Progress Pending |                        |                     |                  |               |           |
| Recorded                      | Started                | Completed Date      | Beginning Period | Ending Period | Completed |
| 05/20/2021<br>12:06 am        | 05/20/2021<br>12:15 am | 05/20/2021 12:16 am | 01/31/2021       | 05/19/2021    | Yes       |

**Figure 9: Production Management Report Complete Tab**

## Packages Inventory Report Update

The update to the packages inventory report now has an additional “Source Package” field. To run the report, navigate to the Control Panel screen under the Reports menu. Once there, the Packages Inventory report can be run. This report is shown below in **Figure 10**.



**Packages Inventory**

Harvest Filter (optional)

Item Filter (optional)

- All Item Categories -

Location Filter (optional)

- All Location Types -

- All Lab Testing States -

Start Date: today 5/1/2021

End Date: today 5/20/2021

PDF Excel CSV Word

facility inventory packages

**Figure 10: Run Packages Inventory Report**

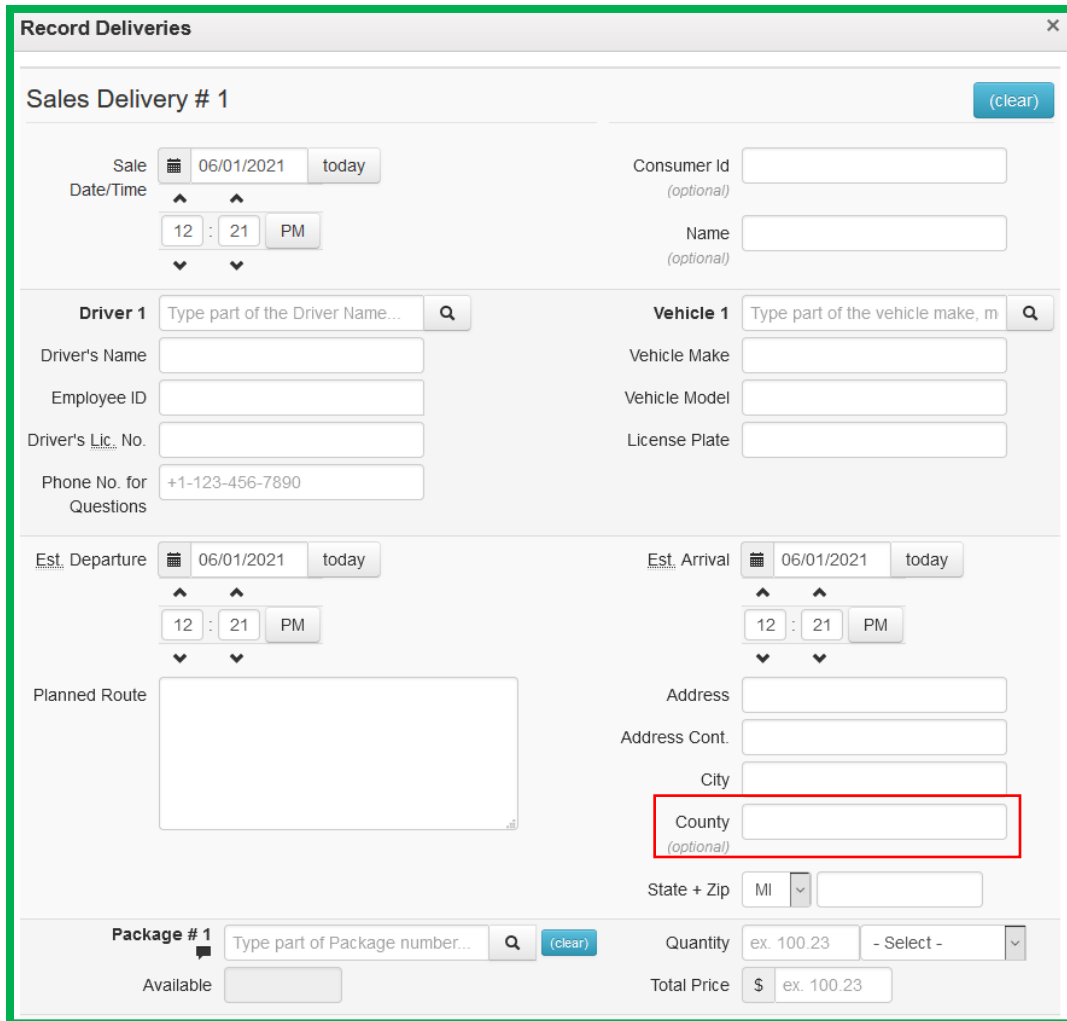
Once run, the source package field can be seen which will indicate the source of the package included in the report.

| Package                  | Harvest            | Source Packages          |
|--------------------------|--------------------|--------------------------|
| ABCDEF012345670000013908 | GA 4.15.21         | ABCDEF012345670000013904 |
| ABCDEF012345670000013907 | Blue Dream 6.22.20 | ABCDEF012345670000013872 |

**Figure 11: Source Package Field**

## Optional County Field in Sales Deliveries

Users with permissions to the Sales Deliveries in Metrc will see a new optional field to denote “County” for where the sales delivery is being delivered as seen in **Figure 12**.



**Record Deliveries**

**Sales Delivery # 1** (clear)

**Sale Date/Time** 06/01/2021 today  
12 : 21 PM

**Consumer Id** (optional)  
**Name** (optional)

**Driver 1** Type part of the Driver Name... Q  
Driver's Name  
Employee ID  
Driver's Lic. No.  
Phone No. for Questions +1-123-456-7890

**Vehicle 1** Type part of the vehicle make, m Q  
Vehicle Make  
Vehicle Model  
License Plate

**Est. Departure** 06/01/2021 today  
12 : 21 PM  
**Planned Route**

**Est. Arrival** 06/01/2021 today  
12 : 21 PM  
**Address**  
**Address Cont.**  
**City**  
**County** (optional)  
**State + Zip** MI

**Package # 1** Type part of Package number... Q (clear)  
Available

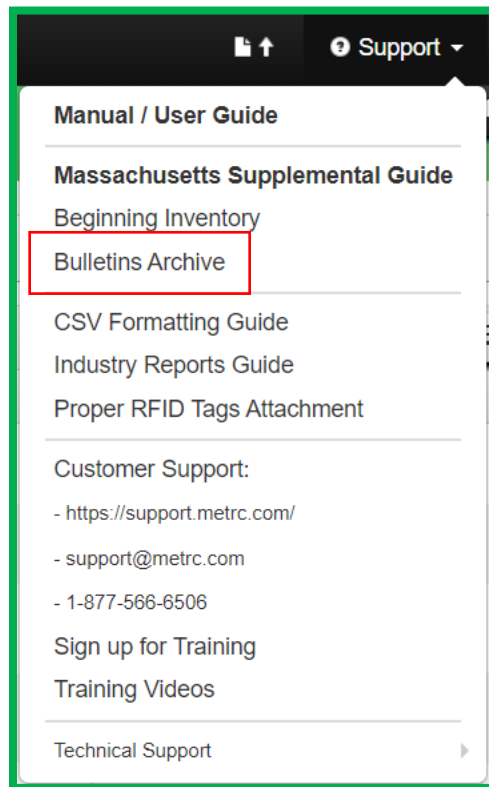
**Quantity** ex. 100.23 - Select -  
**Total Price** \$ ex. 100.23

**Figure 12: Record Sales Delivery**



## **Bulletin Archive Link under the Support Tab**

The Metrc Industry Bulletin Repository can be reached that is housed on the Massachusetts state page on Metrc.com through a link under the support tab on the top navigational menu. This link is shown below in **Figure 13** below.



**Figure 13: Bulletin Archive Link**

## CSV Guidelines Update

The CSV Formatting Guide has been updated and can be found within the Support Dropdown. Updates to this guide include changes going into effect for the Sales Import requirements.

A new column referenced as "Identification Method" will now need to be included in both the Sales (new) and (update) files. An Identification Method is a free form field for users to indicate how they identified the individual making a purchase. At this time, unless the Identification Method is already required for sales receipts, it will not be enabled within this release and additional information would be provided in a future bulletin.

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

*Please feel free to contact support at [support@metrc.com](mailto:support@metrc.com) or 877-566-6506 with any questions.*