Metrc Support Bulletin

Bulletin Number: OK_IB_0001	**Distribution Date**:7/1/21	**Effective Date**: 7/6/21
Contact Point: Metrc® Support	**Subject**: New Features in Metrc	
Reason: 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 cultivators
    III.   Source Package field for the Package Inventory report
    IV.   Fixed CSV Exports in Canned Reports
    V.   Fixed Package History on Sales Delivery Drilldown
    VI.   Updated CSV Formatting Guidelines
    VII.   Updated Metrc General Manual
    VIII.   Updated State Supplemental Manual

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**.
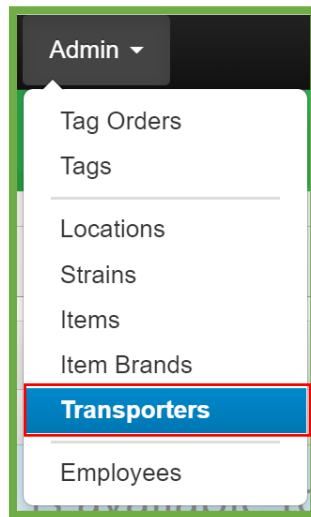

Figure 1: Admin Menu with Transporter Option

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.**

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**.
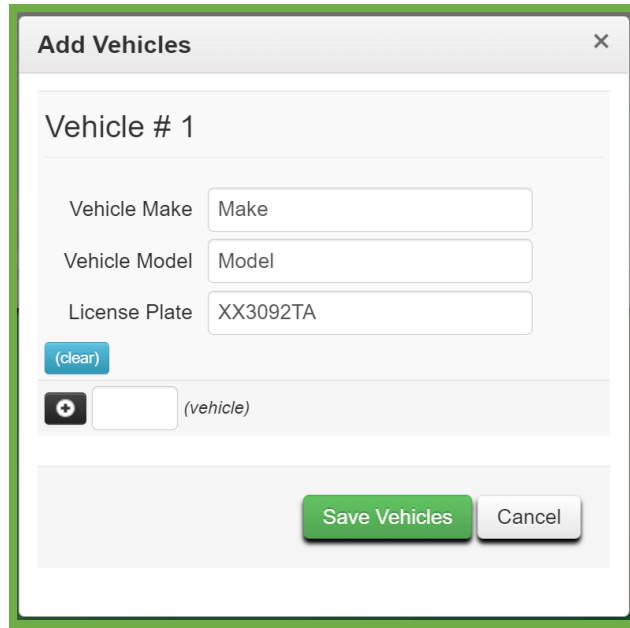

Figure 4: Add and Edit Vehicle Buttons

Figure 5: Add Vehicle Action Window

<u>Production Management Report</u>

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 area. This step is demonstrated below in **Figure 6**.
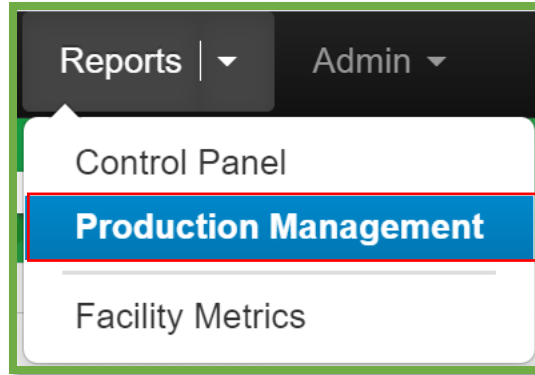
Figure 6: Navigate to the Production Management Report

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**.
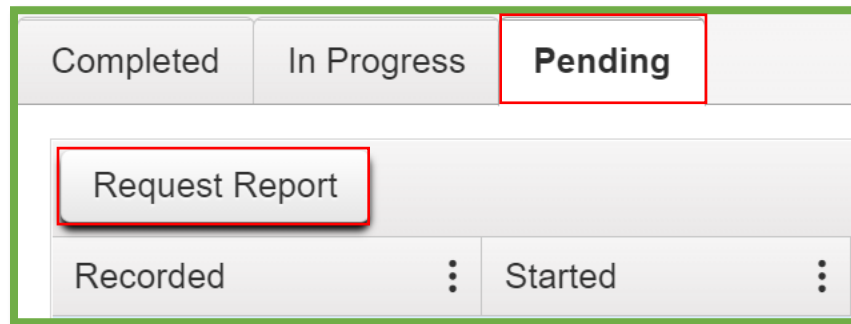

Figure 7: Pending Report Tab and Request Report Button

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

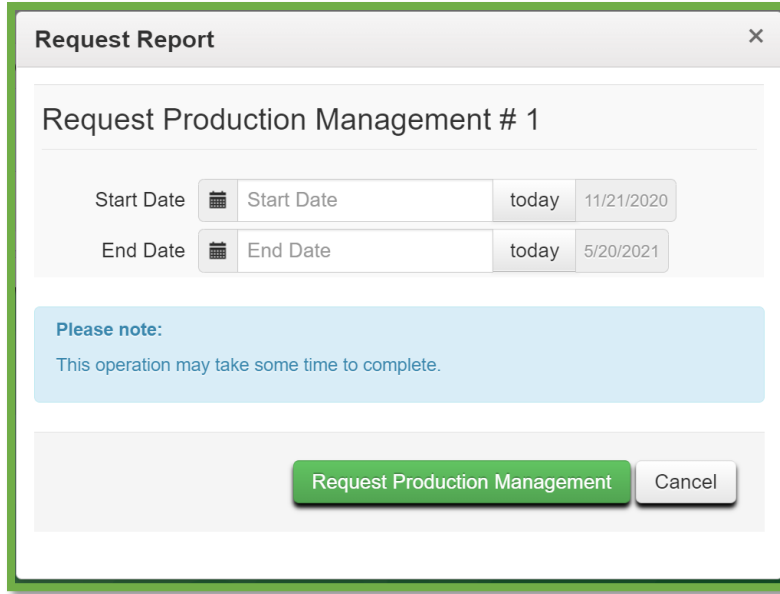**Note:** The date range must be less than 180 days, or the report will not run.

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.

Figure 9: Production Management Report Complete Tab

Packages Inventory Report Update

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, run the Packages Inventory report. This report is shown below in **Figure 10**.
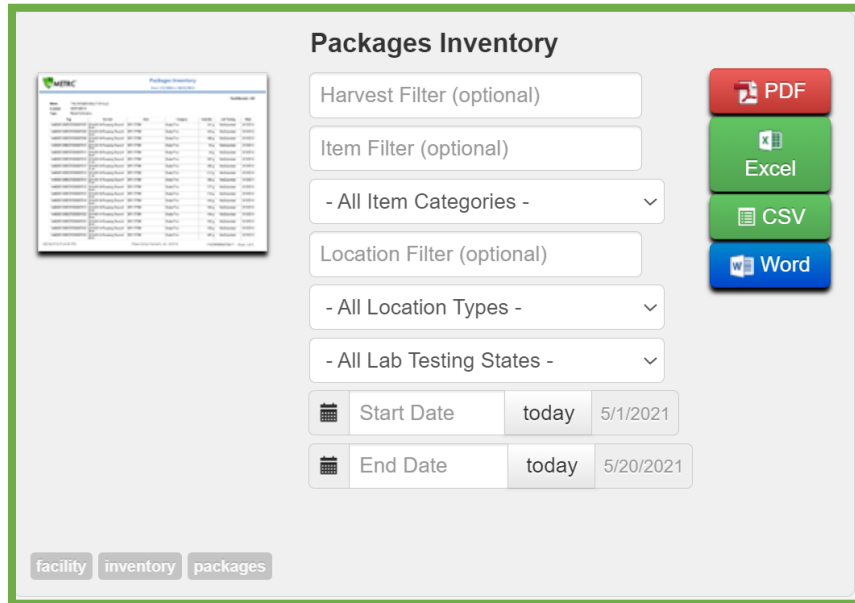

Figure 10: Run Packages Inventory Report

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

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 or 877-566-6506 with any questions.