

<b>Subject:</b> Location Functionality for Microbusinesses	
<b>Bulletin Type</b> <input checked="" type="checkbox"/> New Functionality <input type="checkbox"/> Updated Functionality <input type="checkbox"/> Existing Functionality <input checked="" type="checkbox"/> Rules & Guidance <input type="checkbox"/> Events <input type="checkbox"/> Informational	<b>Primary Audience:</b> Microbusinesses <b>Contact:</b> Metrc Support <b>Distribution Date:</b> 12/01/2021 <b>Effective Date:</b> 01/03/2022 <b>Bulletin Number:</b> CA_IB_2021_008

On **January 3, 2022**, functionality will be implemented requiring Microbusinesses to assign a *Location* (formerly referred to as a *Room*) and *Location Type* to all plant batches, plants, harvests and packages in Metrc. *Location Types* are associated to *Locations* and for Microbusinesses correlate to the activities they can be authorized to perform (Cultivation, Manufacturing, Distribution, or Retail). By assigning *Locations* and *Location Types* to plant batches, plants, harvests and packages, industry and state users will be able to track the movement of inventory between authorized activities on the Microbusiness premises. After implementation of this change, a transfer manifest will no longer be required to track this movement.

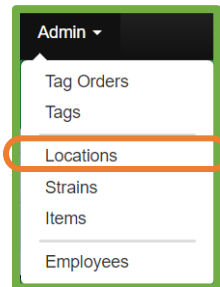
## ACTION REQUIRED

Licensees Required to Take the Action	Action Required	When the Action Must Be Taken
All Microbusinesses	Add new <i>Locations</i> for package inventory, which includes assigning a <i>Location Type</i> of “Cultivation”, “Manufacturing”, “Distribution” or “Retail”. At least one <i>Location</i> must be created for each activity the license is authorized to engage in. See <a href="#">How to Add New Package Locations</a> below for guidance.  <u>Important:</u> Starting January 3, 2022 you will be unable to create new packages, create lab sample packages, or accept transferred packages (new inventory) in Metrc until this step is completed.	Between December 1, 2021 and January 2, 2022
All Microbusinesses	Assign a <i>Location</i> and <i>Location Type</i> to all new inventory. See <a href="#">How to Assign Package Locations to New Inventory</a> below for guidance.	Starting January 3, 2022
All Microbusinesses	Track movement of product between authorized activities. See <a href="#">How to Track Movement Between Authorized Activities</a> below for guidance.	Starting January 3, 2022
All Microbusinesses	Assign a <i>Location</i> and <i>Location Type</i> to all existing packages in your inventory. See <a href="#">How to Assign Locations to Existing Package Inventory</a> below for guidance.	Before February 1, 2022
Microbusinesses Authorized to Engage in Cultivation Activities	Access the <i>Locations</i> page and assign a <i>Location Type</i> of “Cultivation” to all existing <i>Locations</i> used for plant batches, plants, and harvests. See <a href="#">How to Show the Location Type Column in Grids</a> below for guidance.	Before February 1, 2022

## How to Add New Package Locations

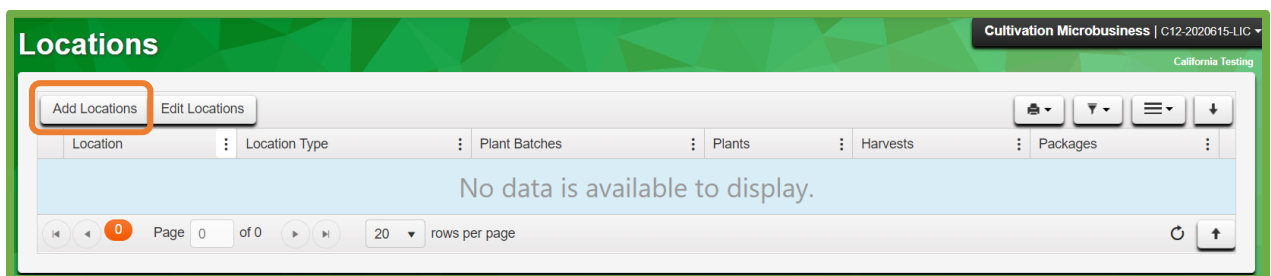
Follow the steps below to add at least one package *Location* for each Microbusiness activity authorized for the license.

1. Select the *Locations* option from the *Admin* menu as shown in **Figure 1** below to access the *Locations* page.




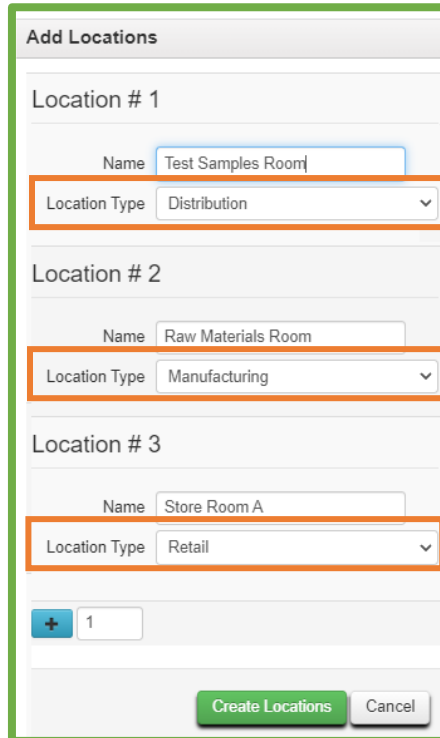
**Figure 1: Locations Option on the Admin Menu**

2. Click the *Add Locations* button on the *Locations* page as shown in **Figure 2** below.



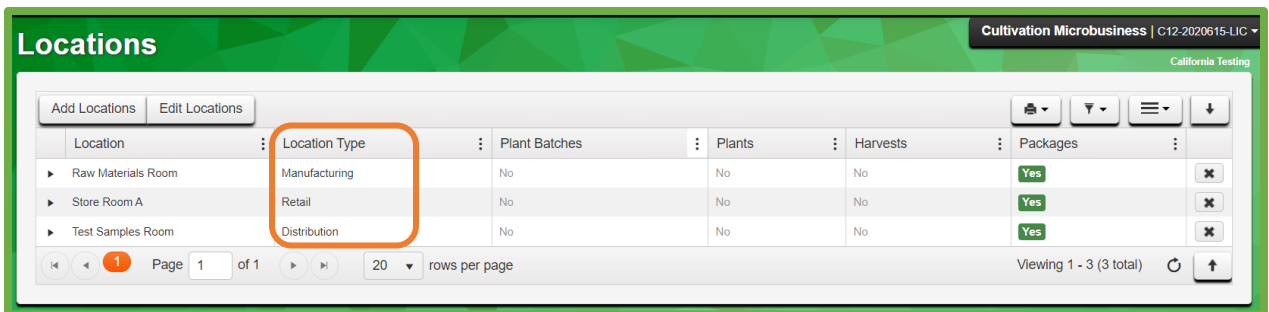
**Figure 2: Add Locations from the Locations Page**

3. Enter a *Name* and select a *Location Type* for the new location from the dropdown as shown in **Figure 3** below. It is recommended that the *Name* represent a location on your premises diagram. The selected *Location Type* must be one of the microbusiness activities (Cultivation, Manufacturing, Distribution, or Retail) authorized for the license and correspond to the activity that will utilize that location. Multiple locations can be added at one time by clicking the  button. Click the *Create Locations* button after all location data has been entered.



**Figure 3: Add Locations Page**

All new package *Locations* have now been added and assigned a *Location Type* as shown in **Figure 4** below. Users will now be able to assign *Locations* when creating new packages, creating lab sample packages, and accepting transferred packages.



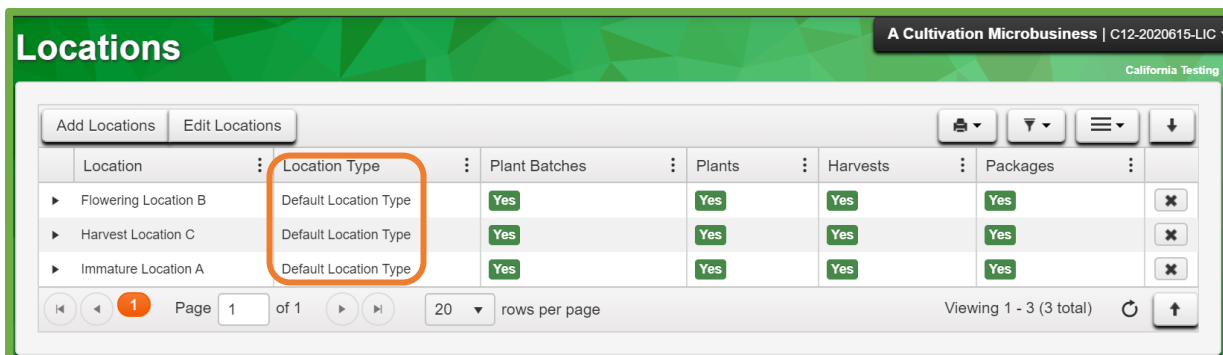
Location	Location Type	Plant Batches	Plants	Harvests	Packages
Raw Materials Room	Manufacturing	No	No	No	Yes
Store Room A	Retail	No	No	No	Yes
Test Samples Room	Distribution	No	No	No	Yes

**Figure 4: Locations Page Displays Added Package Locations**

## How to Edit Existing Plant Locations

If the Microbusiness is authorized to engage in cultivation activities, follow the steps below to edit existing plant batch, plant and harvest locations to assign a *Location Type* of “Cultivation”.

1. Select the *Locations* option from the *Admin* menu as previously shown in **Figure 1** to access the *Locations* page. The *Locations* page will display any previously created plant *Locations* with a “*Default Location Type*” as shown in **Figure 5**.

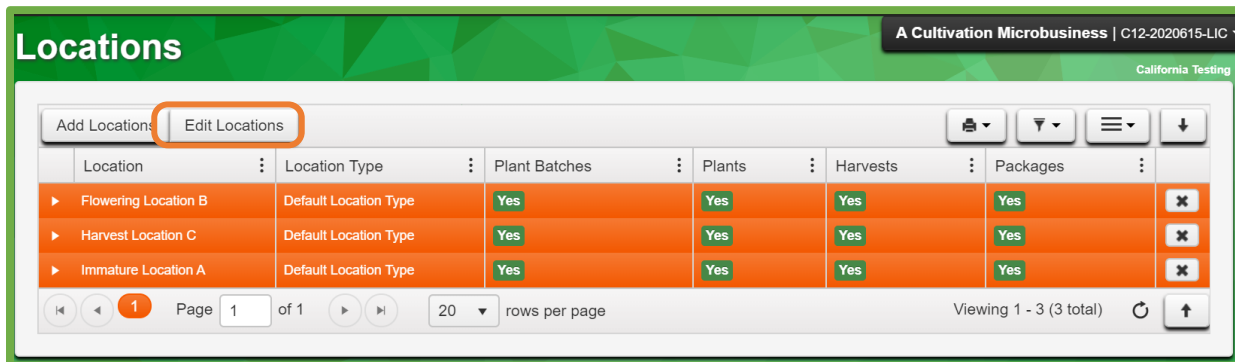


Location	Location Type	Plant Batches	Plants	Harvests	Packages
▶ Flowering Location B	Default Location Type	Yes	Yes	Yes	Yes
▶ Harvest Location C	Default Location Type	Yes	Yes	Yes	Yes
▶ Immature Location A	Default Location Type	Yes	Yes	Yes	Yes

Page 1 of 1 | 20 rows per page | Viewing 1 - 3 (3 total)

**Figure 5: Locations Page with Existing Plant Locations**

2. Select all *Locations* with a “*Default Location Type*” in the list and click the *Edit Locations* button as shown in **Figure 6**.

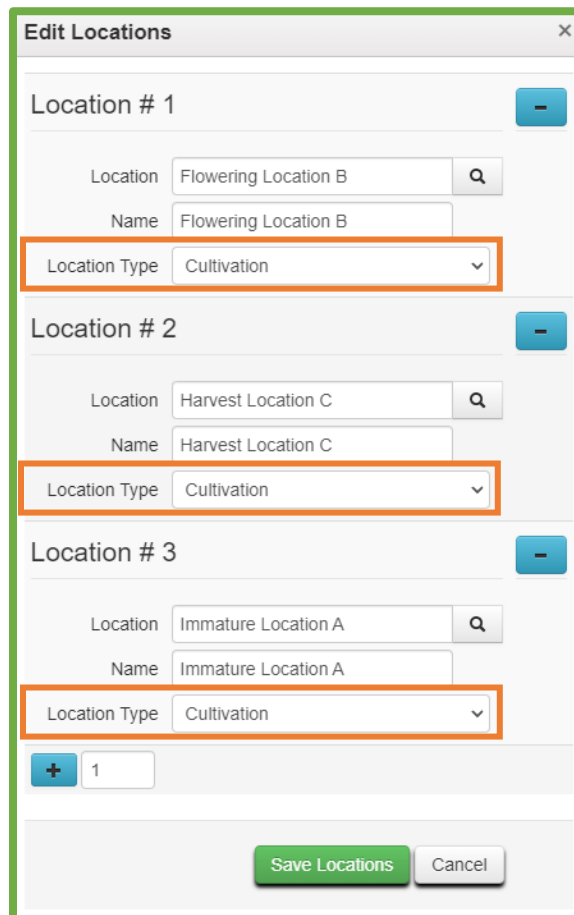


Location	Location Type	Plant Batches	Plants	Harvests	Packages
▶ Flowering Location B	Default Location Type	Yes	Yes	Yes	Yes
▶ Harvest Location C	Default Location Type	Yes	Yes	Yes	Yes
▶ Immature Location A	Default Location Type	Yes	Yes	Yes	Yes

Page 1 of 1 | 20 rows per page | Viewing 1 - 3 (3 total)

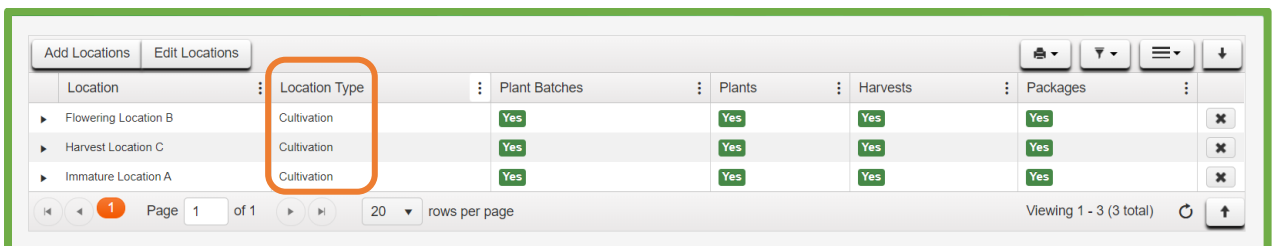
**Figure 6: Edit Locations from the Locations Page**

3. Select “Cultivation” in the *Location Type* dropdown on the *Edit Locations* page as shown in **Figure 7** and click the *Save Locations* button.



**Figure 7: Assigning the Location Type on the Edit Locations Page**

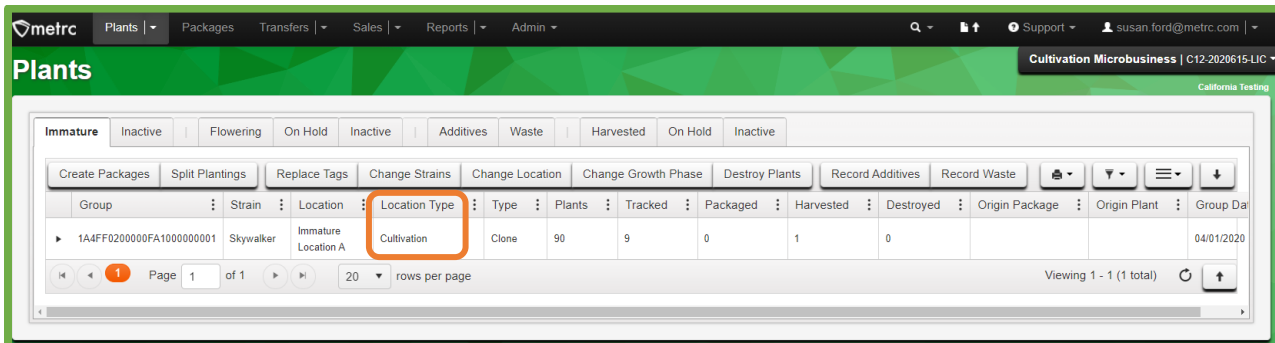
The “Cultivation” *Location Type* has now been assigned to all existing plant batch, plant, and harvest *Locations* as shown in **Figure 8** below.



Location	Location Type	Plant Batches	Plants	Harvests	Packages
Flowering Location B	Cultivation	Yes	Yes	Yes	Yes
Harvest Location C	Cultivation	Yes	Yes	Yes	Yes
Immature Location A	Cultivation	Yes	Yes	Yes	Yes

**Figure 8: Locations Page Displays Cultivation Location Type**

By extension, the “Cultivation” *Location Type* has now also been assigned to all plant batches, plants, and harvests in the existing inventory, as shown in **Figure 9** below for plant batches. Note: *Location Type* is an optional column. See *How to Show the Location Type Column in Grids* below for instructions on how to enable the *Location Type* column.



The screenshot shows the Metrc Plants interface. At the top, there's a navigation bar with tabs: Plants, Packages, Transfers, Sales, Reports, and Admin. Below this is a header for 'Plants' with a sub-header 'Cultivation Microbusiness | C12-2020615-LIC'. The main area contains a grid of plant batches. The grid has columns: Group, Strain, Location, Location Type, Type, Plants, Tracked, Packaged, Harvested, Destroyed, Origin Package, Origin Plant, and Group Date. The 'Location Type' column is highlighted with an orange box. The first row of data shows a plant batch with Group ID '1A4FF0200000FA1000000001', Strain 'Skywalker', Location 'Immature Location A', Location Type 'Cultivation', Type 'Clone', 90 Plants, 9 Tracked, 0 Packaged, 1 Harvested, 0 Destroyed, and a Group Date of 04/01/2020. The grid also includes a toolbar with buttons like 'Create Packages', 'Split Plantings', 'Replace Tags', 'Change Strains', 'Change Location', 'Change Growth Phase', 'Destroy Plants', 'Record Additives', and 'Record Waste'. At the bottom, there's a pagination bar showing 'Page 1 of 1' and '20 rows per page'.

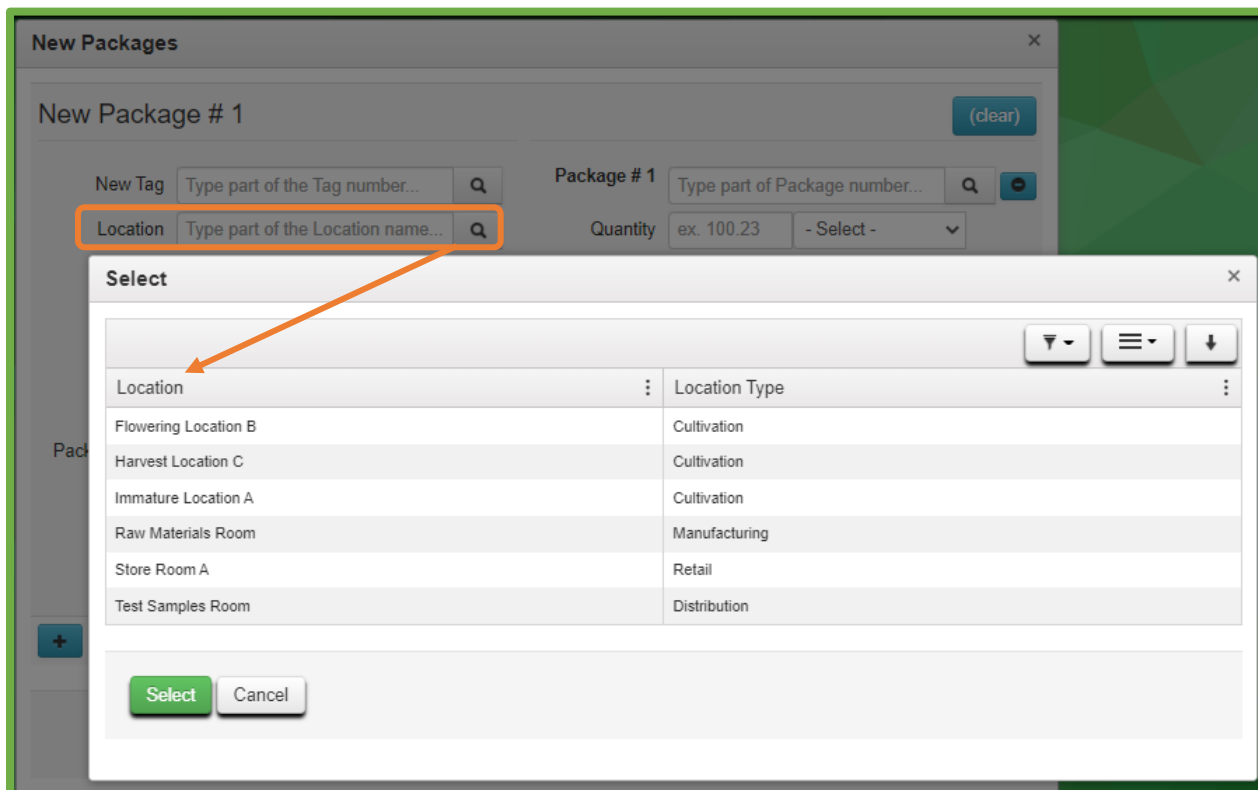
Group	Strain	Location	Location Type	Type	Plants	Tracked	Packaged	Harvested	Destroyed	Origin Package	Origin Plant	Group Date
1A4FF0200000FA1000000001	Skywalker	Immature Location A	Cultivation	Clone	90	9	0	1	0			04/01/2020

**Figure 9: Location Type on Plant Batches Grid**

## How to Assign Package Locations to New Inventory

Microbusiness users must assign *Locations* and *Location Types* when creating new packages, creating lab sample packages, and accepting transferred packages.

1. When creating a new package or creating a new lab sample package, a *Location* must be designated. A *Location* with a *Location Type* of “Cultivation”, “Manufacturing”, “Distribution” or “Retail” can be entered or selected from the lookup list. **Figure 10** below shows an example of the *Location* lookup results from the *New Packages* action window. Note: *Location Type* is an optional column. See *How to Show the Location Type Column in Grids* below for instructions on how to enable the *Location Type* column.

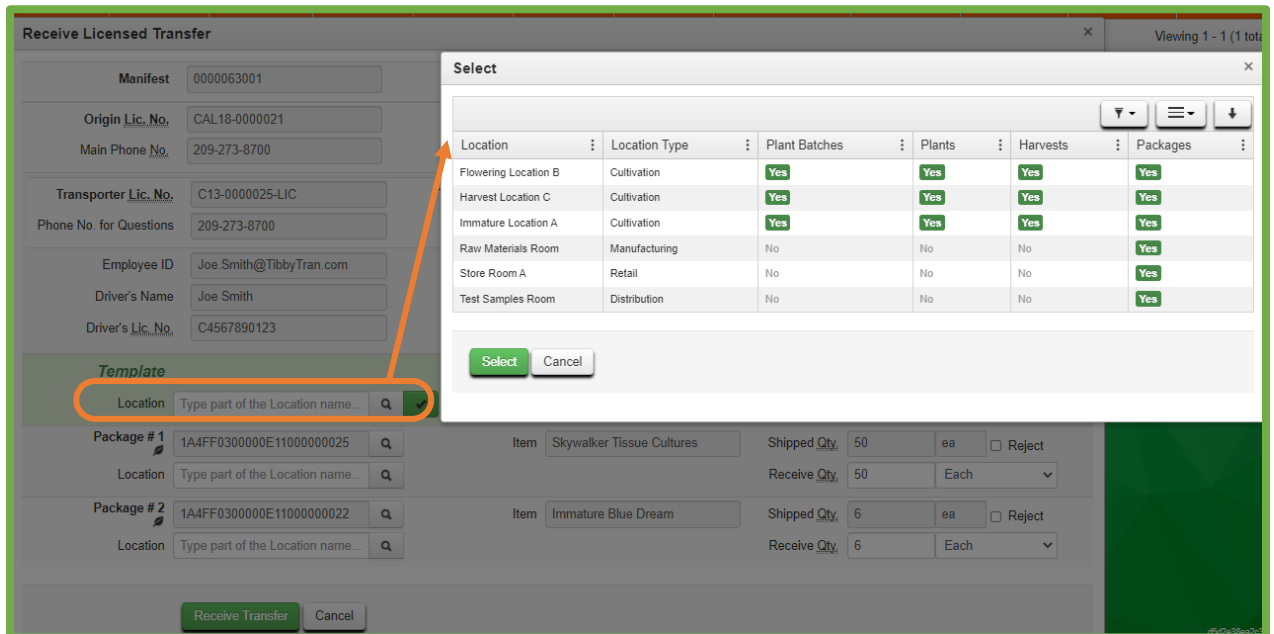


The screenshot shows the 'New Packages' action window. The 'Location' field is highlighted with an orange box. An orange arrow points from the 'Select' button in the lookup dialog to the 'Location' field. The lookup dialog shows a table of locations and their types.

Location	Location Type
Flowering Location B	Cultivation
Harvest Location C	Cultivation
Immature Location A	Cultivation
Raw Materials Room	Manufacturing
Store Room A	Retail
Test Samples Room	Distribution

**Figure 10: Assigning a Location on the New Packages Action Window**

2. Similarly, when accepting a transferred package, a *Location* must be designated. A *Location* with a *Location Type* of “Cultivation”, “Manufacturing”, “Distribution” or “Retail” can be entered or selected from the lookup list. **Figure 11** below shows an example of the *Location* lookup results from the *Received Licensed Transfer* action window.



**Receive Licensed Transfer**

Manifest: 0000063001

Origin Lic. No.: CAL18-0000021

Main Phone No.: 209-273-8700

Transporter Lic. No.: C13-0000025-LIC

Phone No. for Questions: 209-273-8700

Employee ID: Joe.Smith@TibbyTran.com

Driver's Name: Joe Smith

Driver's Lic. No.: C4567890123

**Template**

Location: Type part of the Location name...

Package # 1: 1A4FF0300000E11000000025

Location: Type part of the Location name...

Package # 2: 1A4FF0300000E11000000022

Location: Type part of the Location name...

Item: Skywalker Tissue Cultures

Shipped Qty: 50

Receive Qty: 50

Item: Immature Blue Dream

Shipped Qty: 6

Receive Qty: 6

**Select**

Location	Location Type	Plant Batches	Plants	Harvests	Packages
Flowering Location B	Cultivation	Yes	Yes	Yes	Yes
Harvest Location C	Cultivation	Yes	Yes	Yes	Yes
Immature Location A	Cultivation	Yes	Yes	Yes	Yes
Raw Materials Room	Manufacturing	No	No	No	Yes
Store Room A	Retail	No	No	No	Yes
Test Samples Room	Distribution	No	No	No	Yes

Select Cancel

Receive Transfer Cancel

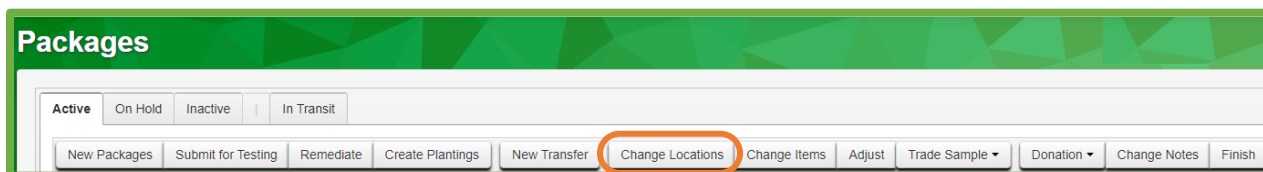
Figure 11: Assigning a Location from the Receive Licensed Transfer Action Window



## How to Track Movement Between Authorized Activities

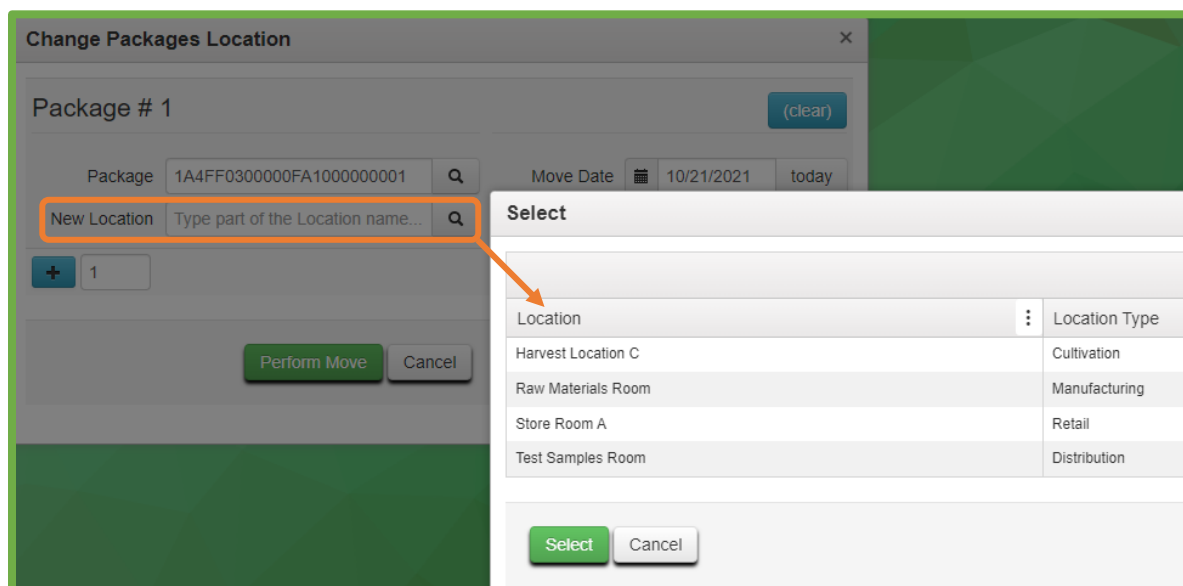
Microbusiness users must track the movement of package inventory between authorized activities by updating the *Location/Location Type* associated with the package.

1. When moving packages between authorized activities, select the package(s) to be moved in the *Packages* grid and click the *Change Locations* button as shown in **Figure 12** below.





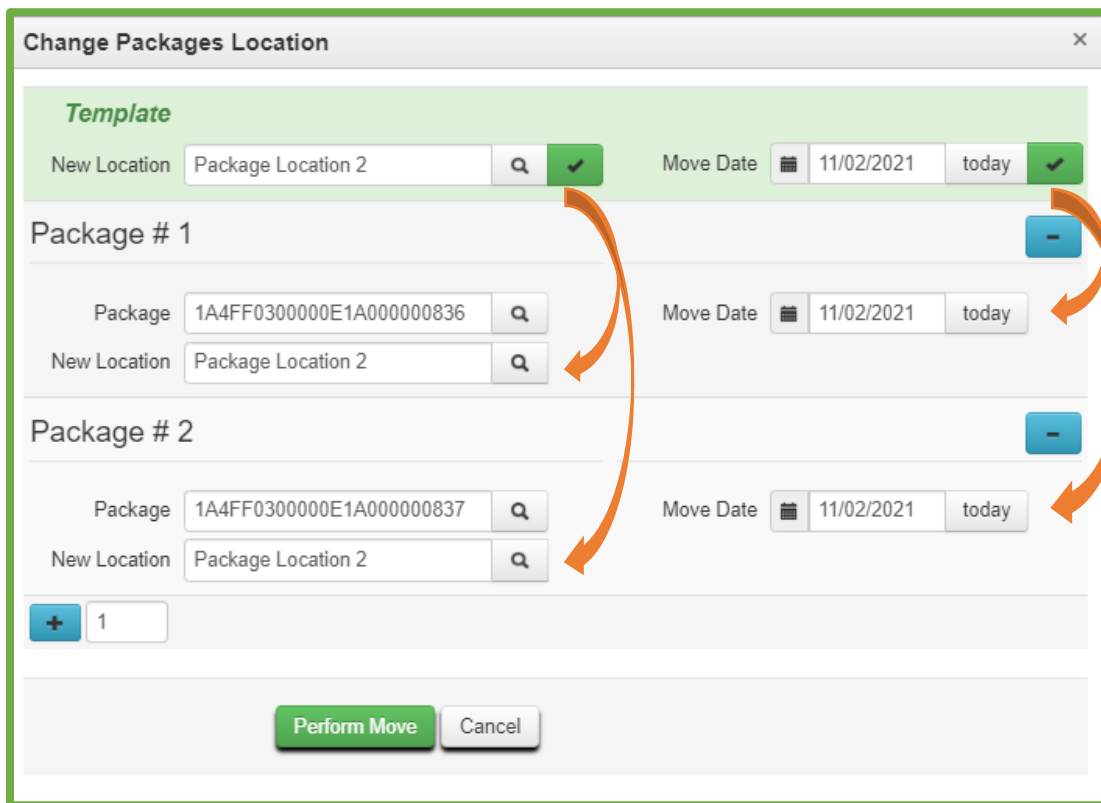
**Figure 12: Example of Assigning a Location from the New Packages Action Window**

2. On the *Change Packages Location* action window, select a new *Location/Location Type* appropriate for the new authorized activity and enter the date the product transitioned to the new activity in the *Move Date* field as shown in **Figure 13** below. Note: *Location Type* is an optional column. See *How to Show the Location Type Column in Grids* below for instructions on how to enable the *Location Type* column.



**Figure 13: Change Packages Location to Track Movement of Product**

The *Locations* for multiple packages can be changed at one time by highlighting multiple package(s) on the *Packages* grid before clicking the *Change Locations* button or by clicking the add  button while on the *Change Packages Location* action window. When multiple packages are selected, the *Template* section is enabled and can be used to apply the same *New Location* and *Move Date* value to all the selected packages by clicking the apply  button as illustrated in **Figure 14** below.



The screenshot shows the 'Change Packages Location' window. At the top, the 'Template' section is highlighted in green. It contains a 'New Location' field with the value 'Package Location 2' and a green checkmark button. To the right, the 'Move Date' is set to '11/02/2021' with a 'today' button and a green checkmark button. Below this, there are two package entries, 'Package # 1' and 'Package # 2'. Each entry has a 'Package' field with a unique ID, a 'New Location' field with the value 'Package Location 2', and a 'Move Date' field with the value '11/02/2021'. Orange arrows point from the 'New Location' and 'Move Date' fields in the 'Template' section to the corresponding fields in the package entries. At the bottom left, there is a blue '+' button and a text input field containing the number '1'. At the bottom center, there are two buttons: 'Perform Move' (green) and 'Cancel' (gray).

**Figure 14: Use Template to Apply New Location to Multiple Packages At One Time**


3. Click the *Perform Move* button to complete the action.

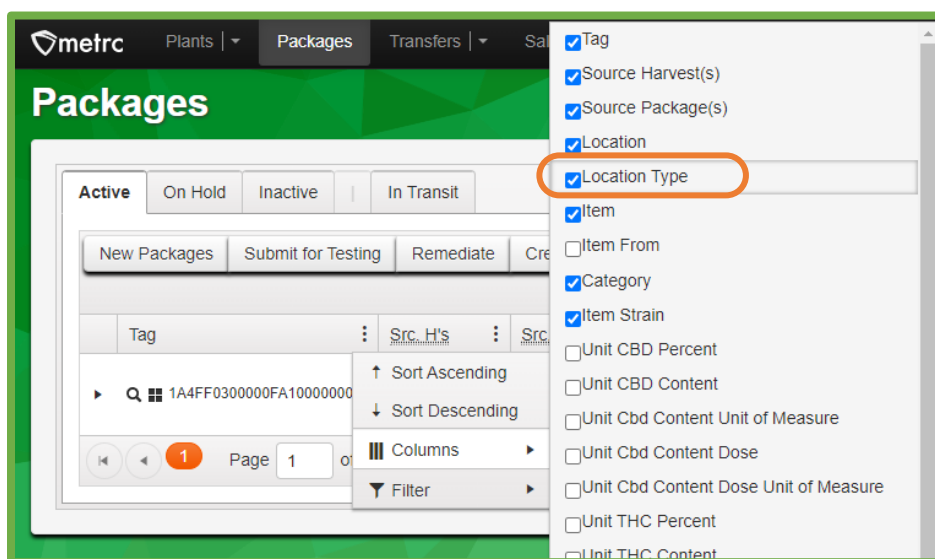
## How to Assign Locations to Existing Package Inventory

Microbusiness users must assign *Locations* and *Location Types* to all existing inventory. To do so, follow the instructions above for tracking the movement of package inventory between authorized activities.

## How to Show the Location Type Column in Grids

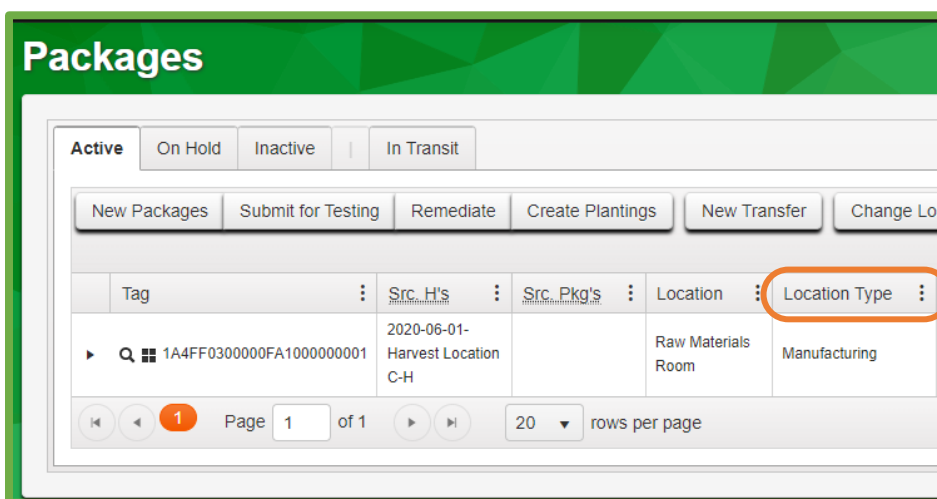
While the *Location* column is displayed by default, the *Location Type* column is optional on many grids. Follow the instructions below to enable the *Location Type* column on any grid that includes the *Location* column.

1. Click the *Column Settings* icon  on the grid and select the *Columns* option from the menu.
2. Mark the checkbox for the *Location Type* column as highlighted in **Figure 15** below for the *Packages* grid.



**Figure 15: Enable Location Type Column on Packages Grid**

The *Location Type* column now displays on the grid as shown in **Figure 16** below.



**Figure 16: Location Type Column Enabled on Packages Grid**

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