

Subject: Location Functionality for Microbusinesses	
Bulletin Type <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	Primary Audience: Microbusinesses Contact: Metrc Support Distribution Date: 12/01/2021 Effective Date: 01/03/2022 Bulletin Number: 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 How to Add New Package Locations 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 How to Assign Package Locations to New Inventory below for guidance.	Starting January 3, 2022
All Microbusinesses	Track movement of product between authorized activities. See How to Track Movement Between Authorized Activities 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 How to Assign Locations to Existing Package Inventory 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 How to Show the Location Type Column in Grids 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.

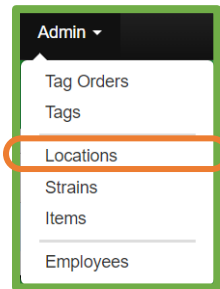


Figure 1: Locations Option on the Admin Menu

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

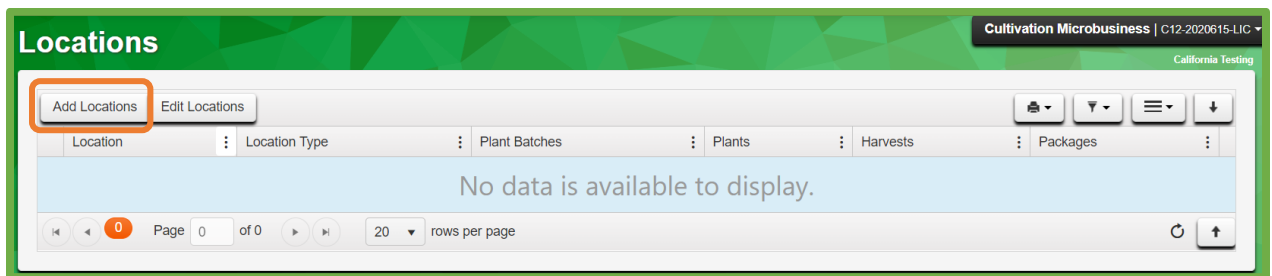

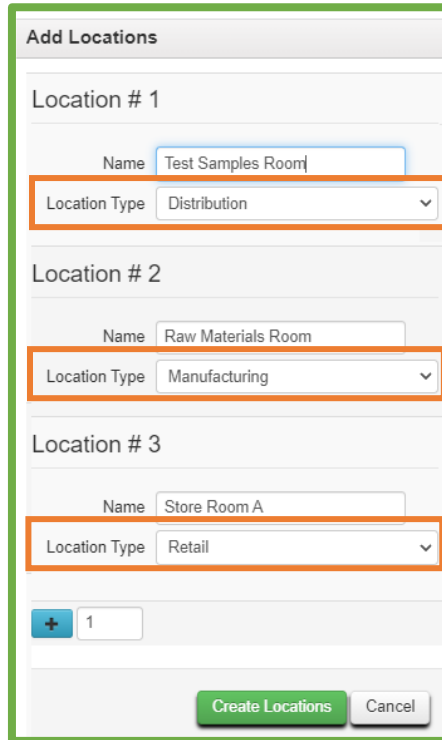


Figure 2: Add Locations from the Locations Page

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.



Add Locations

Location # 1
Name: Test Samples Room
Location Type: Distribution

Location # 2
Name: Raw Materials Room
Location Type: Manufacturing

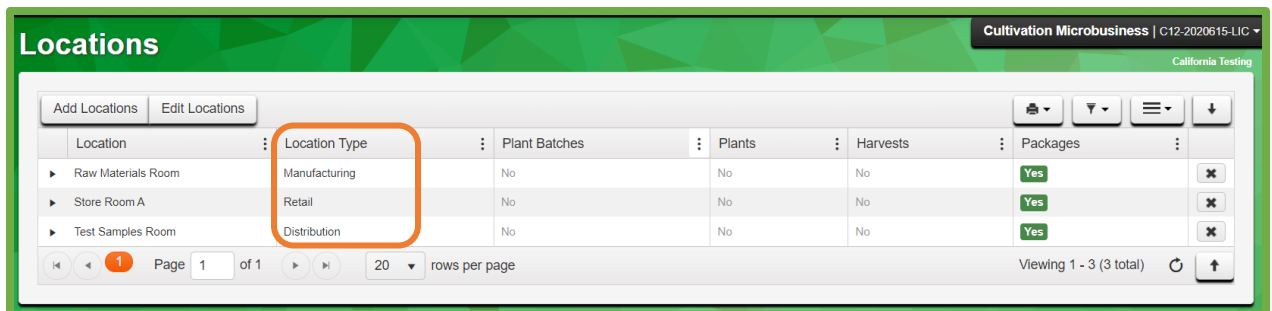
Location # 3
Name: Store Room A
Location Type: Retail

+ 1

Create Locations Cancel

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

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

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**.

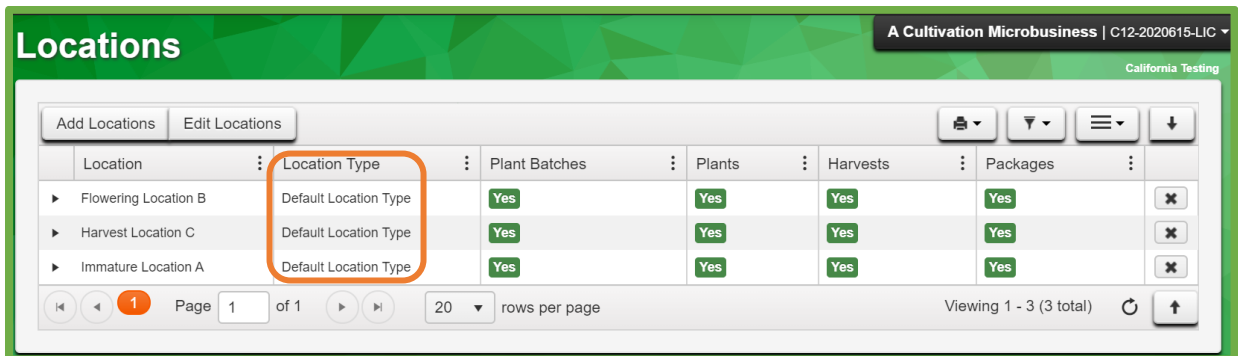


Figure 5: Locations Page with Existing Plant Locations

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

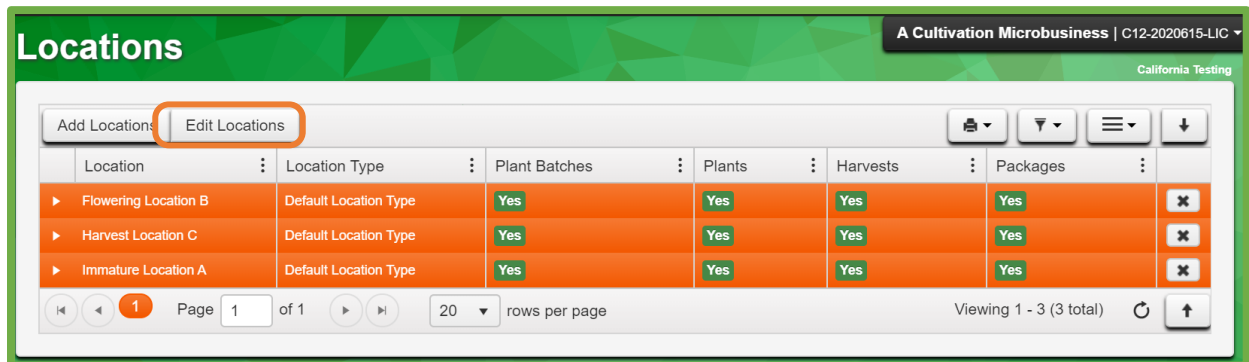


Figure 6: Edit Locations from the Locations Page

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.

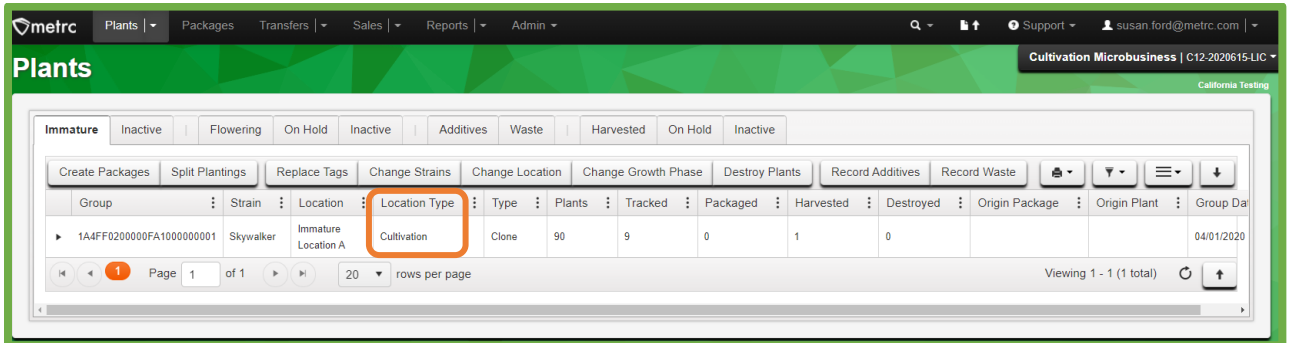


Figure 9: Location Type on Plant Batches Grid

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.

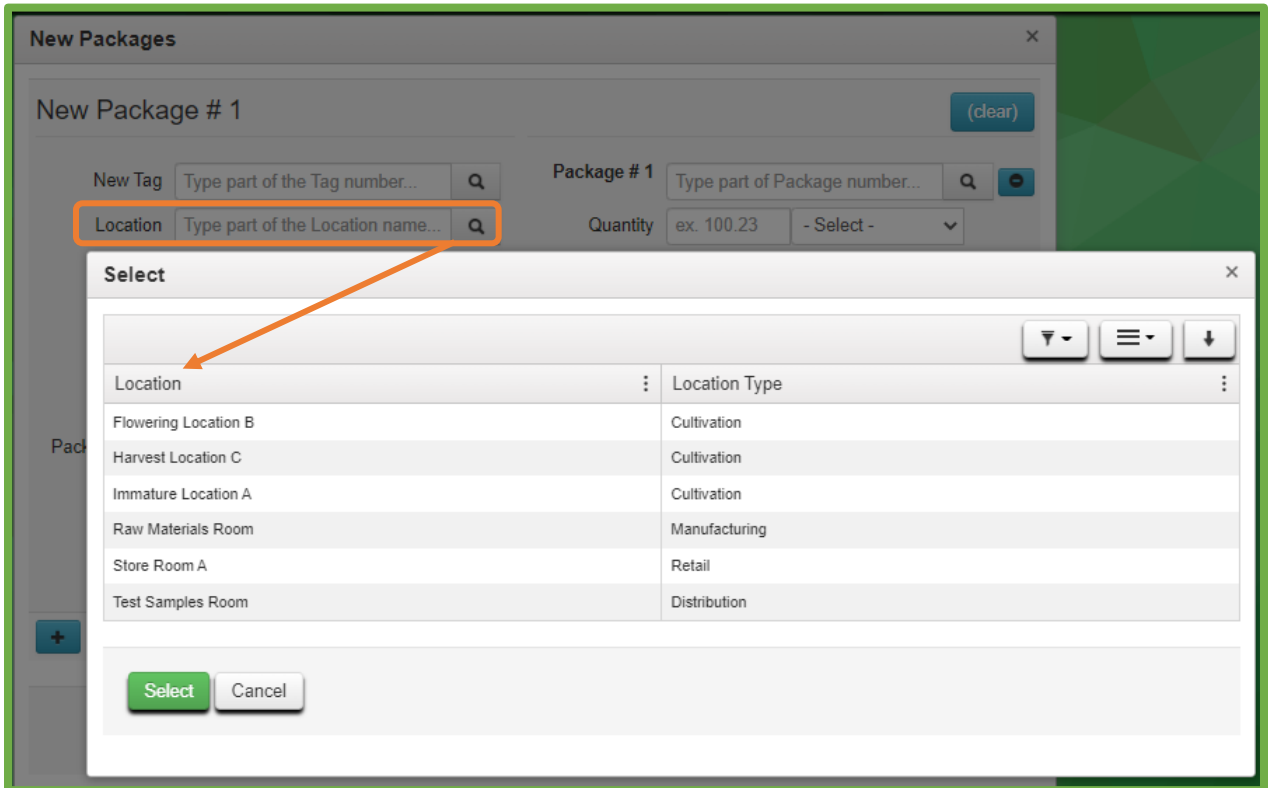


Figure 10: Assigning a Location on the New Packages Action Window

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.

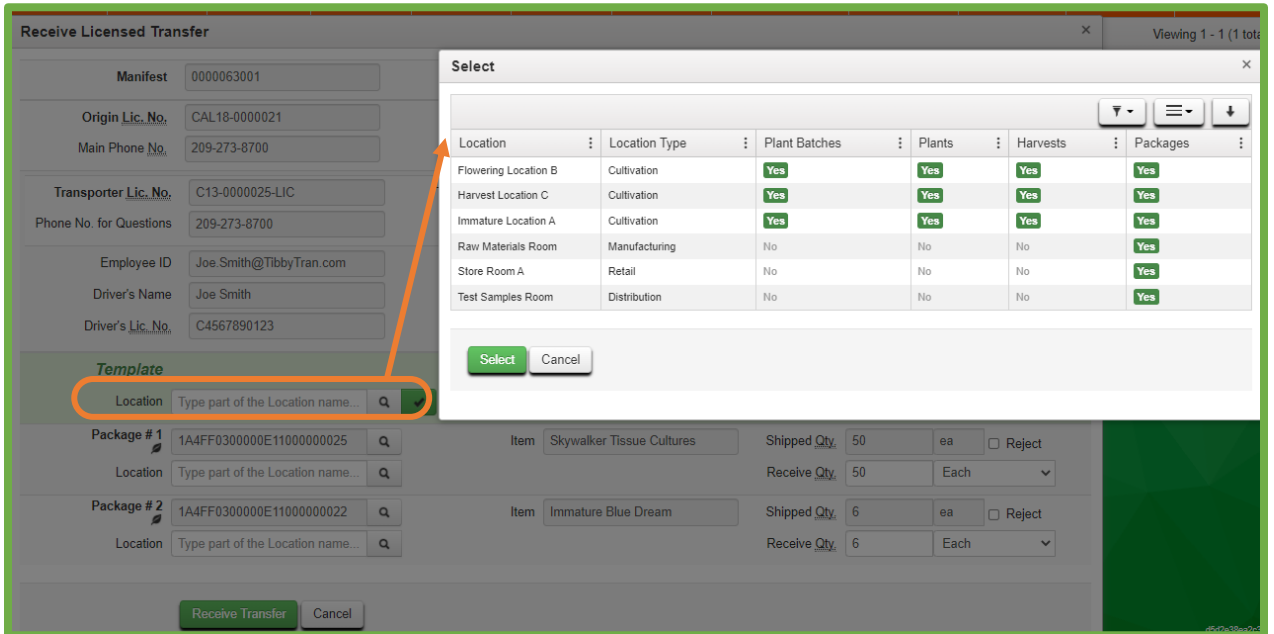


Figure 11: Assigning a Location from the Receive Licensed Transfer Action Window

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.

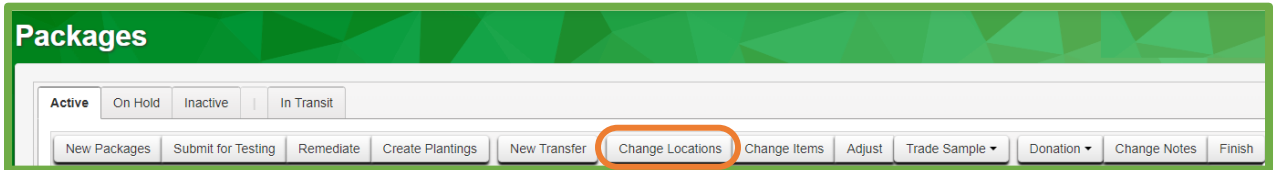


Figure 12: Example of Assigning a Location from the New Packages Action Window

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.

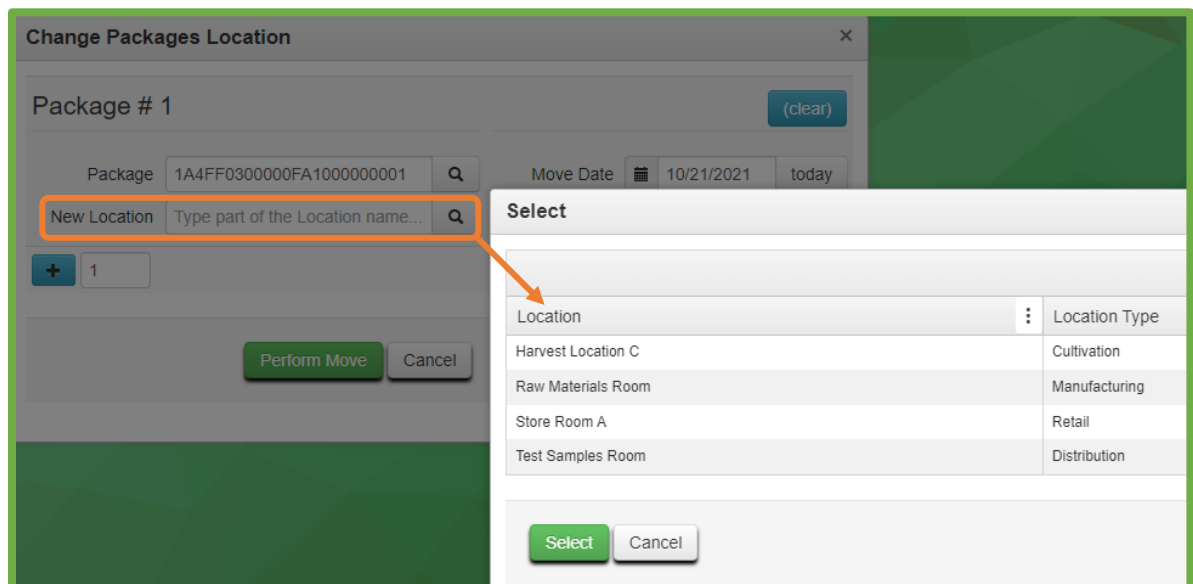




Figure 13: Change Packages Location to Track Movement of Product

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.

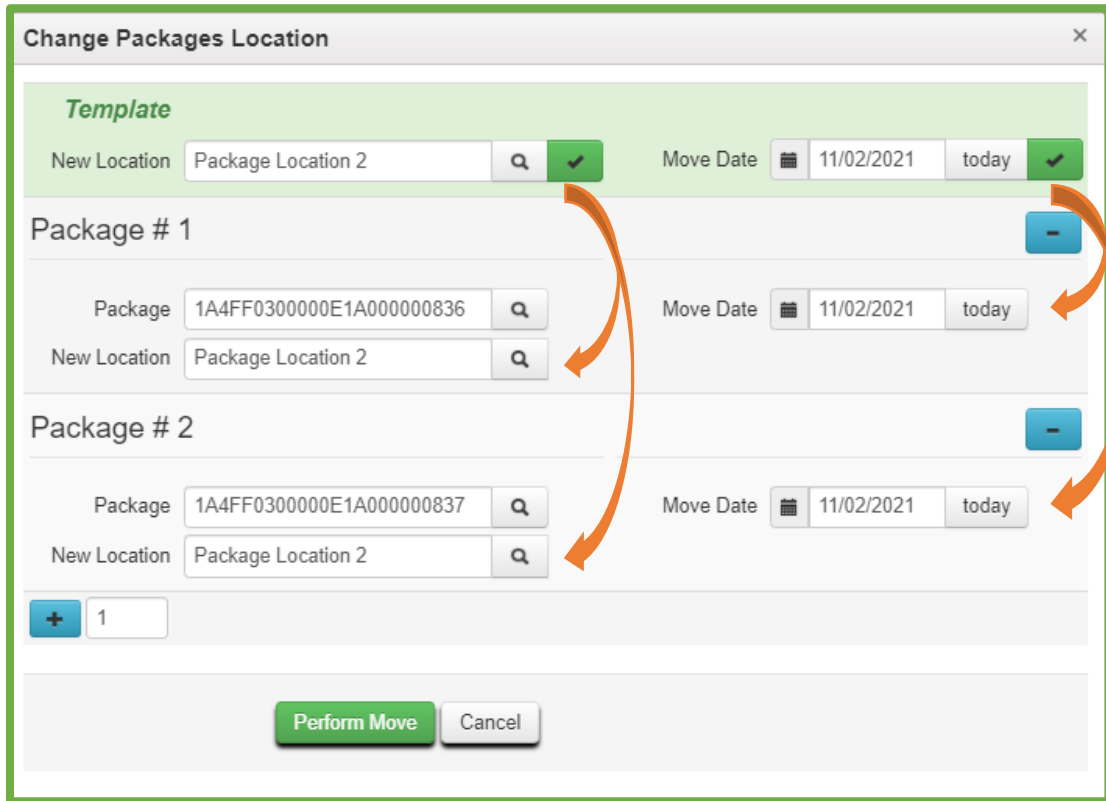


Figure 14: Use Template to Apply New Location to Multiple Packages At One Time


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.

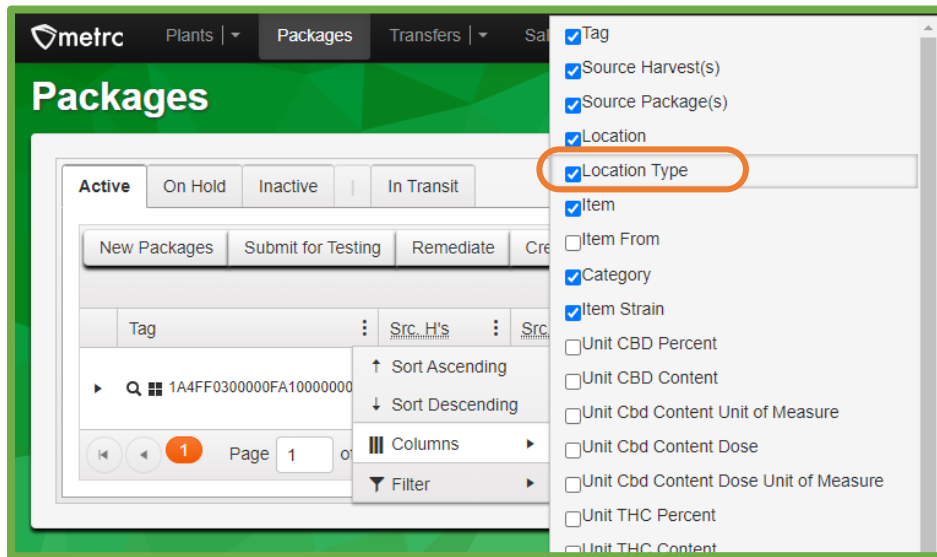


Figure 15: Enable Location Type Column on Packages Grid

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

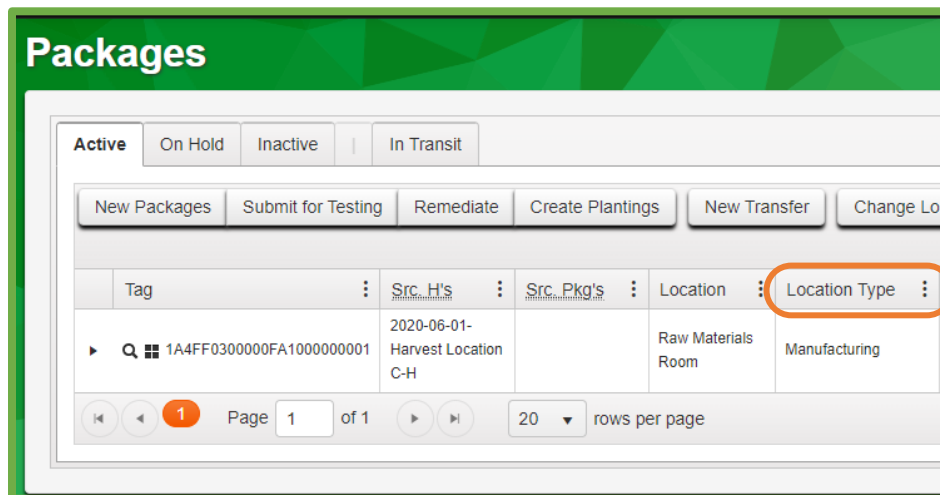


Figure 16: Location Type Column Enabled on Packages Grid

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