

Montana - Metrc Support Bulletin

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|---|---|---------------------------------|
| Bulletin Number: MTIB#009_082319 | Distribution Date: 08/23/19 | Effective Date: see each |
| Contact Point: Support@metrc.com | Subject: Release Memo - New Features | |
| Reason: Metrc is providing details on new features & functionality within Metrc. | | |

Greetings Metrc® Users,

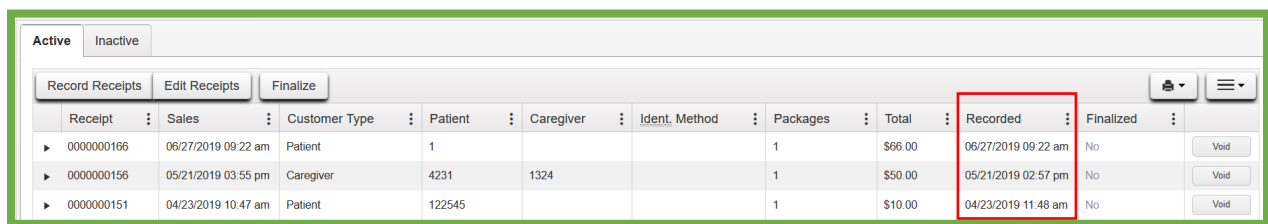
Metrc is pleased to provide information on our newest enhancements within the software.

- Users will now have more columns and information available within the Sales Receipt, Packages, and Transfers grids for all license types that have the respective permissions.
- Users with plant permissions will now have the ability to take corrective action on incorrect harvest waste entries by discontinuing the waste back into the harvest batch.
- The transfer manifest will now have item specific details and source package information for each package where applicable.
- Metrc has also now implemented row count restrictions on CSV uploads into the system.

Please find on the following pages a detailed description of the guidance and new functionality:

New Column: Recorded Sales

The Sales Receipts and Deliveries (if applicable) grid now includes a 'Recorded' column representing the **actual** date/time the entry was created. As a reminder, licensees can enter data into Metrc three ways (Manual, CSV, or API) and the recorded column represents the time Metrc receives the information from any of those entry sources.



| Receipt | Sales | Customer Type | Patient | Caregiver | Ident. Method | Packages | Total | Recorded | Finalized | |
|-------------|---------------------|---------------|---------|-----------|---------------|----------|---------|---------------------|-----------|------|
| ▶ 000000166 | 06/27/2019 09:22 am | Patient | 1 | | | 1 | \$66.00 | 06/27/2019 09:22 am | No | Void |
| ▶ 000000156 | 05/21/2019 03:55 pm | Caregiver | 4231 | 1324 | | 1 | \$50.00 | 05/21/2019 02:57 pm | No | Void |
| ▶ 000000151 | 04/23/2019 10:47 am | Patient | 122545 | | | 1 | \$10.00 | 04/23/2019 11:48 am | No | Void |

Figure 1: Recorded Sales Receipts

Additional Information: Sales Receipts

The Sales Receipts and Deliveries (if applicable) grid now captures additional information for each package sold to a patient. When a user selects the drill-down arrow next to any package on a sales receipt they will now be able to reference the Required Lab Test Batches, Lab Results, and History for the package.

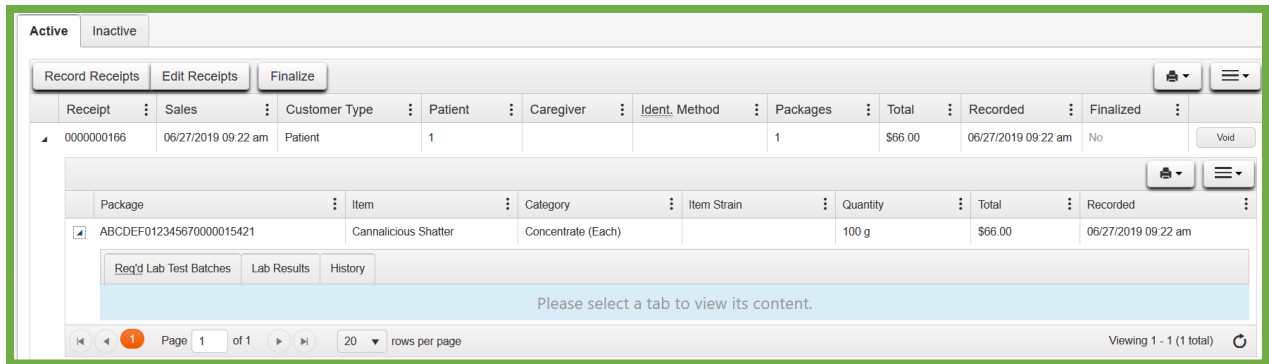


Figure 2: Additional Package Information

New Columns: Item Information

Users will now see additional columns outlined in **Figure 3** available within the packages, transfers, and sales grid for item specific fields that are related to the package.

As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.

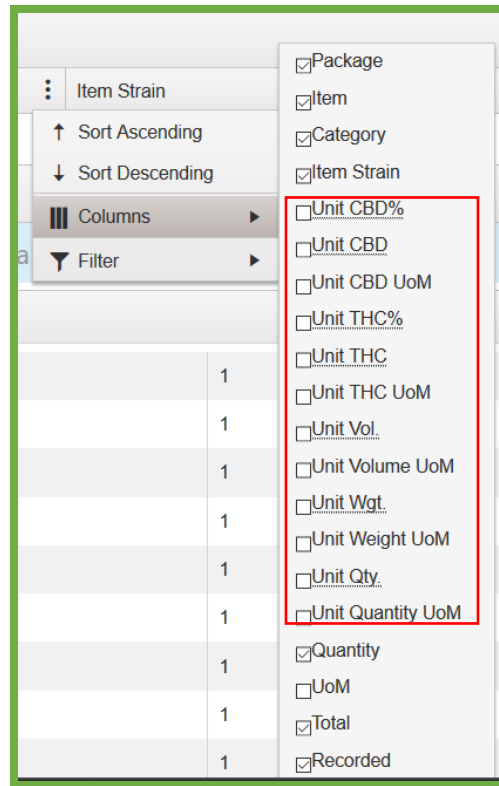
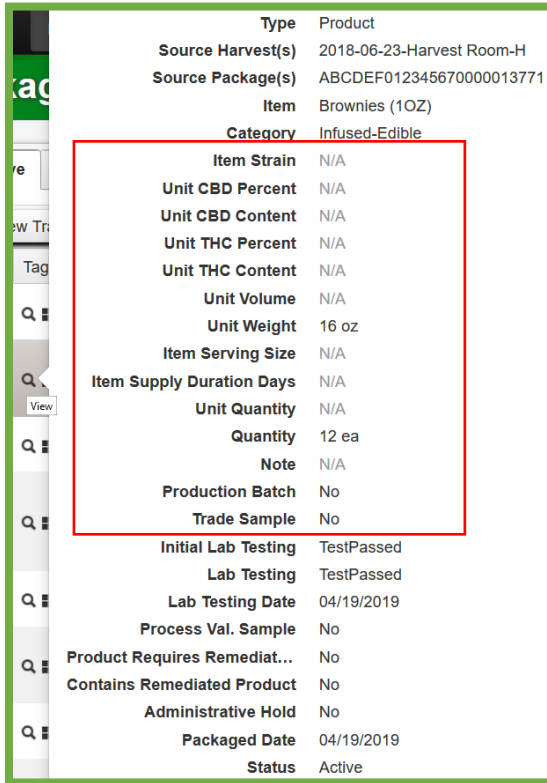


Figure 3: New Available Columns for Item Information

Additional Information: Sales Receipts

Users will now see additional information in **Figure 4** available when hovering over the magnifying glass of any package within their packages inventory or on an incoming transfer. This information is directly tied to the item created by the original licensee who created the package in Metrc.


As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.



| | |
|------------------------------|---------------------------|
| Type | Product |
| Source Harvest(s) | 2018-06-23-Harvest Room-H |
| Source Package(s) | ABCDEF012345670000013771 |
| Item | Brownies (1OZ) |
| Category | Infused-Edible |
| Item Strain | N/A |
| Unit CBD Percent | N/A |
| Unit CBD Content | N/A |
| Unit THC Percent | N/A |
| Unit THC Content | N/A |
| Unit Volume | N/A |
| Unit Weight | 16 oz |
| Item Serving Size | N/A |
| Item Supply Duration Days | N/A |
| Unit Quantity | N/A |
| Quantity | 12 ea |
| Note | N/A |
| Production Batch | No |
| Trade Sample | No |
| Initial Lab Testing | TestPassed |
| Lab Testing | TestPassed |
| Lab Testing Date | 04/19/2019 |
| Process Val. Sample | No |
| Product Requires Remediat... | No |
| Contains Remediated Product | No |
| Administrative Hold | No |
| Packaged Date | 04/19/2019 |
| Status | Active |

Figure 4: New Available Columns for Item Information

New Button: Discontinue Harvest Waste

When drilling down into a harvest batch, users can now toggle to the Waste tab and find a new discontinue () button next to each waste entry as seen in **Figure 5**. Once the discontinue button is selected, a confirmation box (**Figure 6**) will populate for the user to confirm the action. When the OK button is selected, the waste entry is removed, and the waste weight is added back into the weight of the harvest batch.

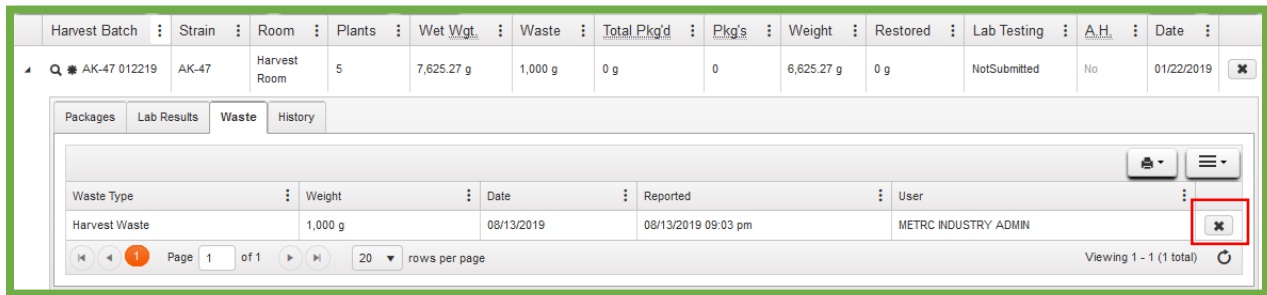


Figure 5: Discontinuing Harvest Waste

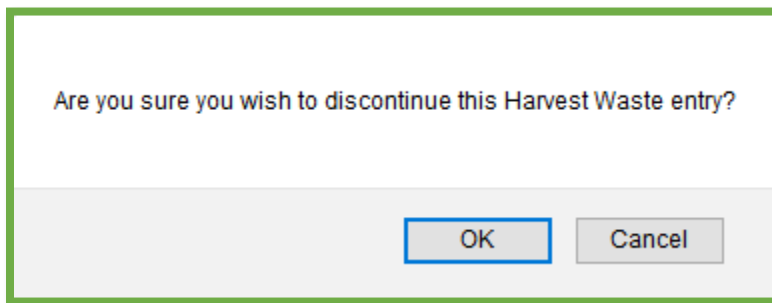


Figure 6: Confirming Discontinuation of Harvest Waste

Additional Information: Transfer Manifests

When registering and receiving transfers, users will now see that the Transfer Manifest provides additional information about the packages included on the manifest. Each package now includes the item details (Strain, Unit Weight, Unit THC Content, etc.) and source package information.

| Package # 1 | Production Batch No. | Item Name | Quantity |
|--|--------------------------|----------------|--|
| ABCDEF012345670000015892 Lab Test: TestPassed Status: Accepted | | Buds (Buds) | Shp: 300.0000 g Rcv: 300.0000 g GWT: 5025.0000 g |
| Item Details | Strain: Kayote Blu | | |
| Source Harvest(s) | Kayote Blu Harvest 6/3 | | |
| Source Package(s) | ABCDEF012345670000015891 | | |

Figure 7: Additional Details on Transfer Manifest

System Restrictions: CSV Row Count

Metrc processes all records in a CSV file as a single upload transaction. Before storing any data, Metrc reviews each record to make sure there are no errors (such as a data type mismatch or the wrong number of values). If any record in the file generates an error, the upload is rejected. Metrc will report each error and the row on which it occurred. The user must then modify the CSV file and retry.

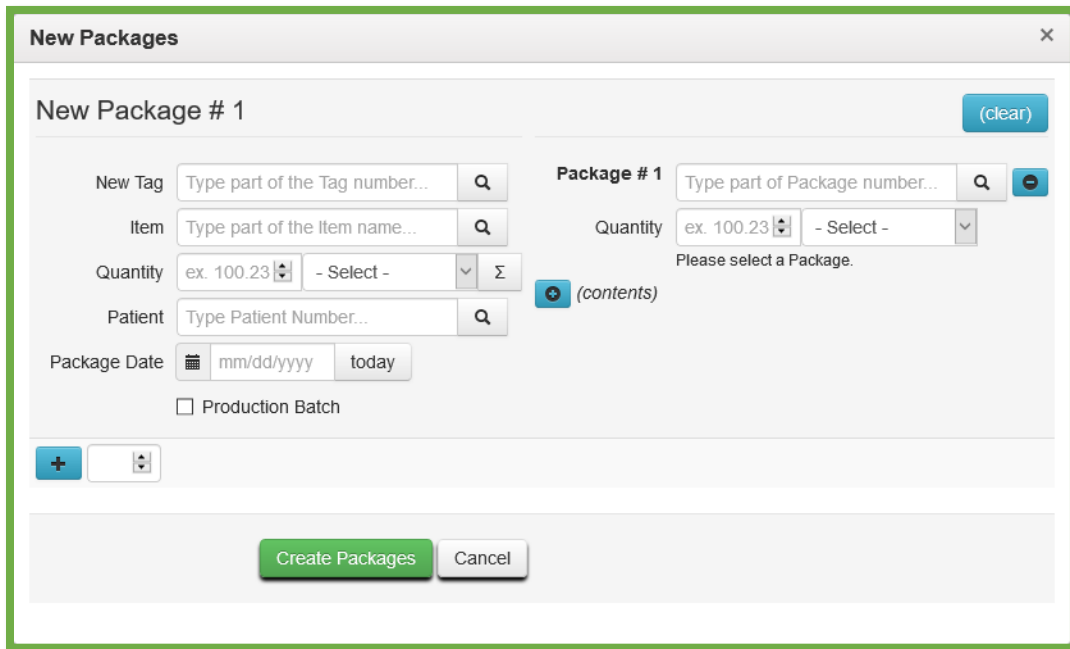
With this information in mind, Metrc has implemented a restriction of 500 rows maximum for each CSV file uploaded into the system. If this maximum is exceeded, the data can be split into separate files that do not exceed the 500-row maximum.

The exception made at this time will be for lab test results. There is currently no maximum limit set for the lab results being uploaded via the CSV import.

This limitation applies only to CSV imports and does not apply to data interfaced through API.

New Feature: Creating Packages

In the section of the Create packages, the system will now allow the user to input the number of packages they need to create and Metrc will create that number below. Simply input the desired number and select the blue plus sign button. The Package template will appear at the top and can be used to complete the subsequent packages.



The screenshot shows a window titled "New Packages" with a close button (X) in the top right corner. Inside the window, there is a section for "New Package # 1" with a "(clear)" button. Below this, there are several input fields: "New Tag" (with a search icon), "Item" (with a search icon), "Quantity" (with a spinner and a "- Select -" dropdown), "Patient" (with a search icon), and "Package Date" (with a calendar icon and a "today" button). A checkbox for "Production Batch" is also present. A blue plus sign button with "(contents)" text is located to the right of the Quantity field. At the bottom of the window, there are "Create Packages" and "Cancel" buttons.

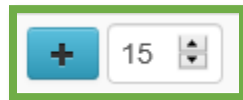


Figure 8: Adding Packages Enhancement

**** The user may also utilize the up and down arrows to input the desired number of packages.**

New Packages [X]

Template

Tag Sequence: Type part of the Tag number... [Q] ✓ Quantity: ex. 100.23 [↑↓] ✓ - Select - [v] ✓

Item: Type part of the Item name... [Q] ✓ **Mini-template: Add Content Packages**

Unit of Measure: - Select - [v] ✓ Package: Type part of Package number... [Q] ✓ [⊕]

Patient: Type Patient Number... [Q] ✓ Quantity: ex. 100.23 [↑↓] - Select - [v]

Package Date: [calendar] mm/dd/yyyy today [✓] Production Batch [✓]

New Package # 1 [-]

New Tag: Type part of the Tag number... [Q] Package # 1: Type part of Package number... [Q] [⊖]

Item: Type part of the Item name... [Q] Quantity: ex. 100.23 [↑↓] - Select - [v]

Quantity: ex. 100.23 [↑↓] - Select - [v] Σ Please select a Package.

Patient: Type Patient Number... [Q] [⊕] (contents)

Package Date: [calendar] mm/dd/yyyy today Production Batch

New Package # 2 [-]

New Tag: Type part of the Tag number... [Q] Package # 1: Type part of Package number... [Q] [⊖]

Item: Type part of the Item name... [Q] Quantity: ex. 100.23 [↑↓] - Select - [v]

Quantity: ex. 100.23 [↑↓] - Select - [v] Σ Please select a Package.

Patient: Type Patient Number... [Q] [⊕] (contents)

Package Date: [calendar] mm/dd/yyyy today Production Batch

New Package # 3 [-]

New Tag: Type part of the Tag number... [Q] Package # 1: Type part of Package number... [Q] [⊖]

Item: Type part of the Item name... [Q] Quantity: ex. 100.23 [↑↓] - Select - [v]

Quantity: ex. 100.23 [↑↓] - Select - [v] Σ Please select a Package.

[⊕] (contents)

Figure 9: Creating Multiple New Packages

New Feature: Sales Transactions Report

The Sales Transactions report includes the following information: Sales Number, Date/Time, Customer, Amount, Package, Item, Category, Quantity, Price, and Item Information.

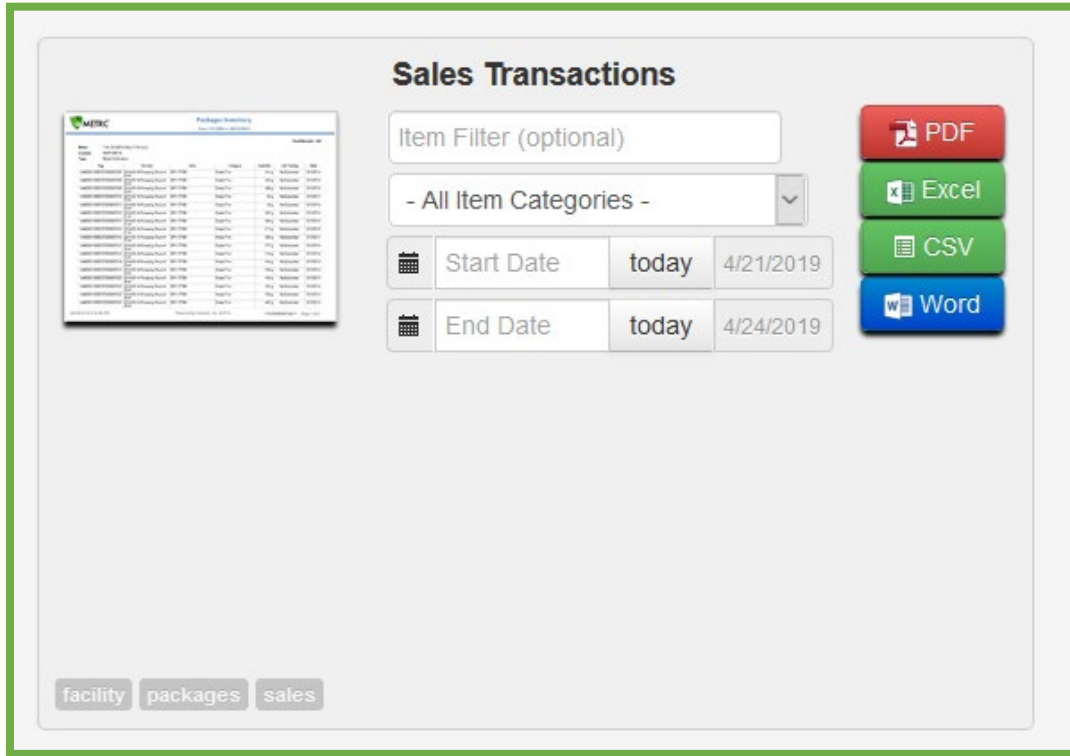


Figure 10: Sales Transactions Canned Report

**** Users can select all item categories or select an item from the drop-down list. The default date range is one week.**

New Feature: Change Rooms in Harvest

As seen below within **Figure 11**, users with permission to the plants section will now have a new selectable *Change Room* button within the harvested tab. This button should be utilized if a harvest batch has been moved from the initial designated room. Industry users should accurately identify the location of their harvest batches, and the entire harvest batch should be in the same location.

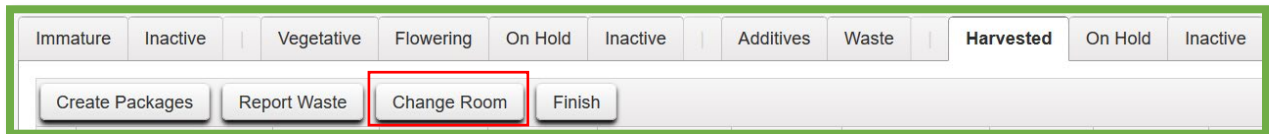


Figure 11: Upcoming Harvest Tab Layout

If a user identifies a harvest batch that requires a room update, **Figure 12** is an example on how the change would be made. The user would select the harvest batch in need of a change and click the *Change Room* button. After the selection, the user would see the box below. Selecting the magnifying glass icon will populate all available rooms. Once the available rooms are populated, the user would select the new room for the harvest batch and click Change Rooms.

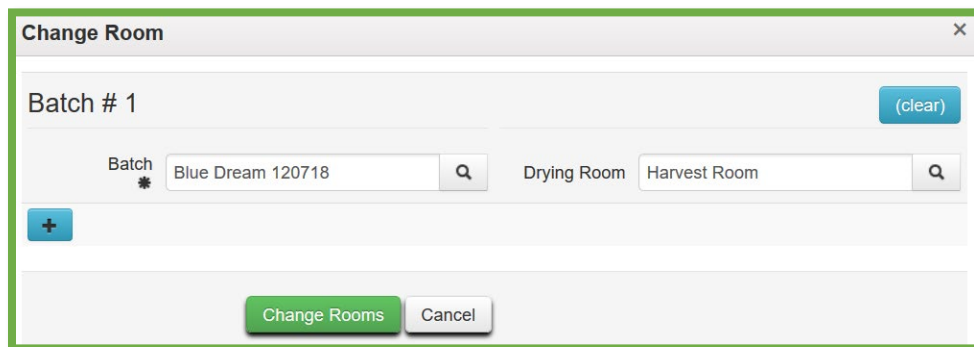


Figure 12: Changing Room for a Harvest Batch

New Feature: Edit Planting Names

As seen below within **Figure 13**, users with permission to the plants section will now have a new selectable *Rename* button within the immature tab. This button should be utilized if an immature plant batch has an incorrect name associated to the batch. Industry users should accurately identify the names of their immature plant batches, and the recommended best practice is to enter the strain name and date of planting.

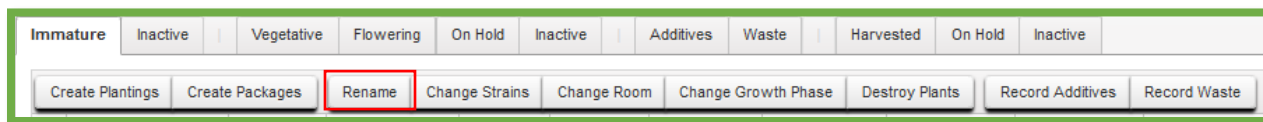


Figure 13: Upcoming Immature Tab Layout

If a user identifies an immature plant batch that requires a name update, **Figure 14** is an example on how the change would be made. The user would select the immature batch in need of a change and click the *Edit Planting Names* button. After the selection, the user would see the box below and make the edit within the group name field. Once the edit is deemed correct, the user would click Edit Plantings.

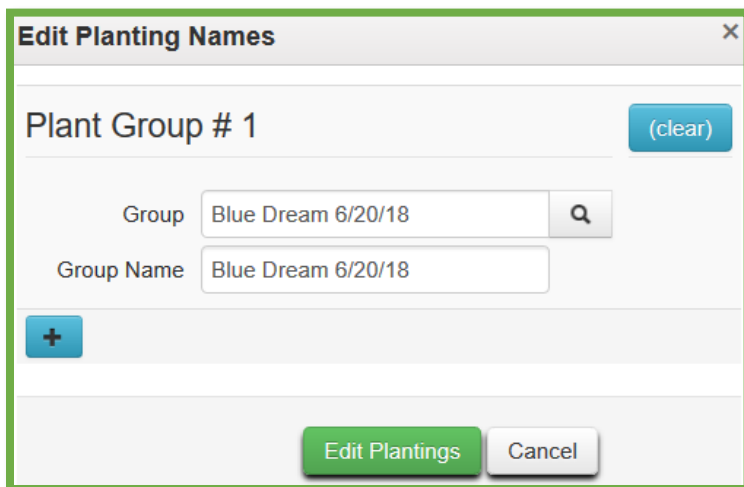
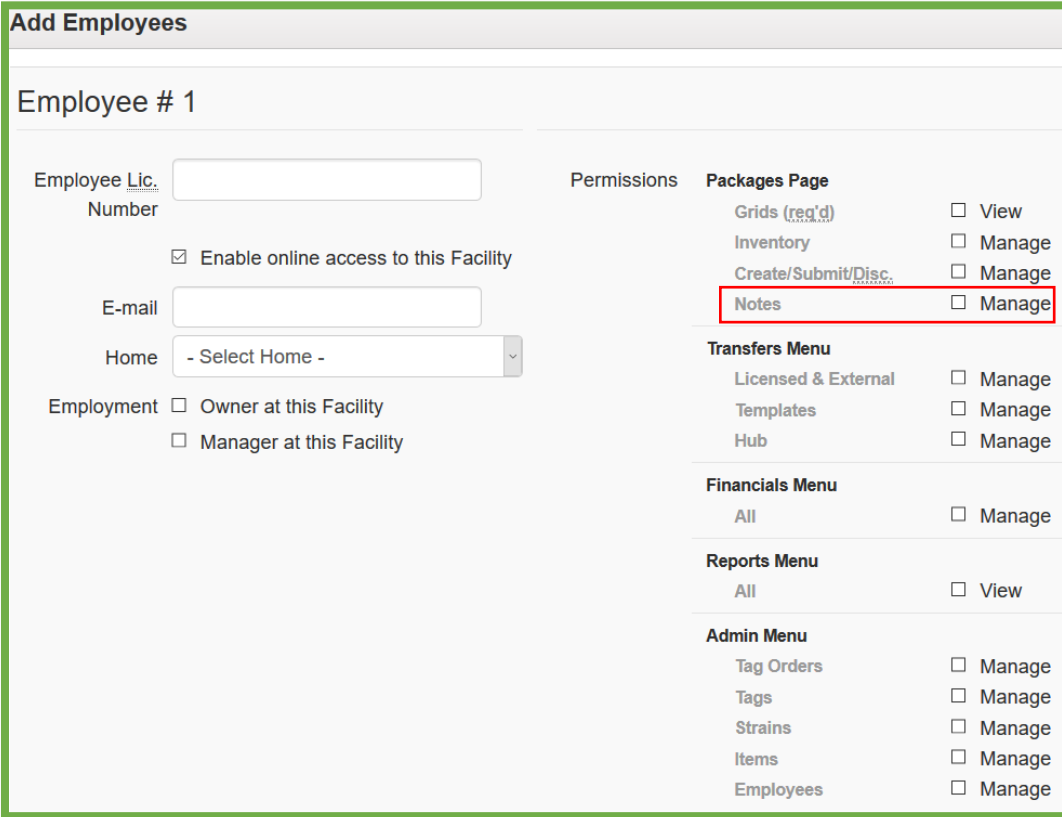


Figure 14: Editing an Immature Plant Group

New Feature: Package Notes

Licensees will see a new permission available under the packages page for their employees. As seen in **Figure 15**, if a user is permitted to manage the “Notes” section, the user will then have the ability to create a note within any package in their facility. The note section is a free form field that is not a requirement when creating a new package. A package note can be viewed within the history tab pictured in **Figure 17**. The notes feature can be used at the user’s discretion to provide further detail about a specific package within a licensee’s inventory.



The screenshot shows the 'Add Employees' form for 'Employee # 1'. It includes fields for 'Employee Lic. Number', 'E-mail', and 'Home'. There are checkboxes for 'Enable online access to this Facility' and 'Employment' (Owner/Manager at this Facility). A 'Permissions' table is visible on the right side of the form.

| Permissions | Package Page |
|------------------------|---------------------------------|
| Grids (req'd) | <input type="checkbox"/> View |
| Inventory | <input type="checkbox"/> Manage |
| Create/Submit/Disc. | <input type="checkbox"/> Manage |
| Notes | <input type="checkbox"/> Manage |
| Transfers Menu | |
| Licensed & External | <input type="checkbox"/> Manage |
| Templates | <input type="checkbox"/> Manage |
| Hub | <input type="checkbox"/> Manage |
| Financials Menu | |
| All | <input type="checkbox"/> Manage |
| Reports Menu | |
| All | <input type="checkbox"/> View |
| Admin Menu | |
| Tag Orders | <input type="checkbox"/> Manage |
| Tags | <input type="checkbox"/> Manage |
| Strains | <input type="checkbox"/> Manage |
| Items | <input type="checkbox"/> Manage |
| Employees | <input type="checkbox"/> Manage |

Figure 15: New Employee Permission for Package Notes

Figure 16: New Package Form

| Tag | Src. H's | Src. Pkg's | Room | Item | Category | Quantity | P.B. | P.B. No. | Lab Testing | A.H. | Date | Rcv'd |
|--------------------------|---------------------------|--------------------------|--------|--------------|----------|----------|------|----------|---------------------|------|------------|-------|
| ABCDEF012345670000014598 | 2018-06-23-Harvest Room-M | ABCDEF012345670000012253 | Room 2 | Buds - AK-47 | Buds | 2 g | No | | SubmittedForTesting | No | 06/14/2019 | |

| Description | Employee | Date | Reported | Sources | External App |
|---|-------------------------------|------------|---------------------|---------|--------------|
| Packaged 2 Grams of Buds - AK-47 from another Package - Took 2 Grams of Buds - AK-47 from Package ABCDEF012345670000012253 - Package Type: Product - Room: Room 2 - Note: R&D Test Sample - Required Lab Test Batches: ---R&D Testing Package's Lab Testing set to SubmittedForTesting | METRC INDUSTRY ADMIN (X00***) | 06/14/2019 | 06/14/2019 08:25 am | User | |
| Package's Lab Testing set to SubmittedForTesting | METRC INDUSTRY ADMIN (X00***) | 06/14/2019 | 06/14/2019 08:25 am | User | |

Figure 17: Package History

Montana - Metrc Support Bulletin

New Feature: Change Package Notes

If a package has been created without a note, or a licensee would like to update a previously created note, they can use the Change Notes button as seen in **Figure 18**. The button will trigger the action window seen within **Figure 19** where a licensee can enter a new note. All updates to package notes will be captured within the package's history tab in **Figure 20**.

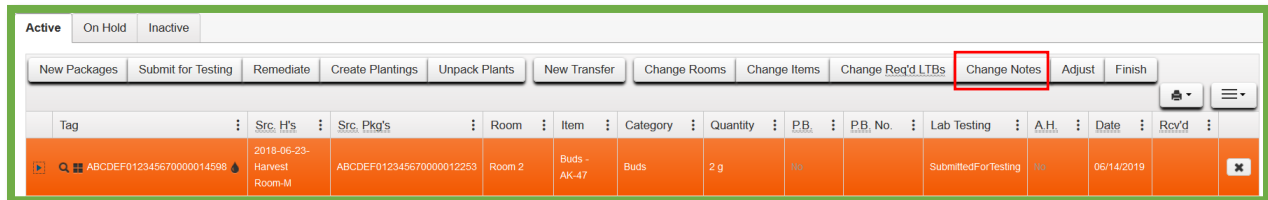


Figure 18: Packages Change Notes

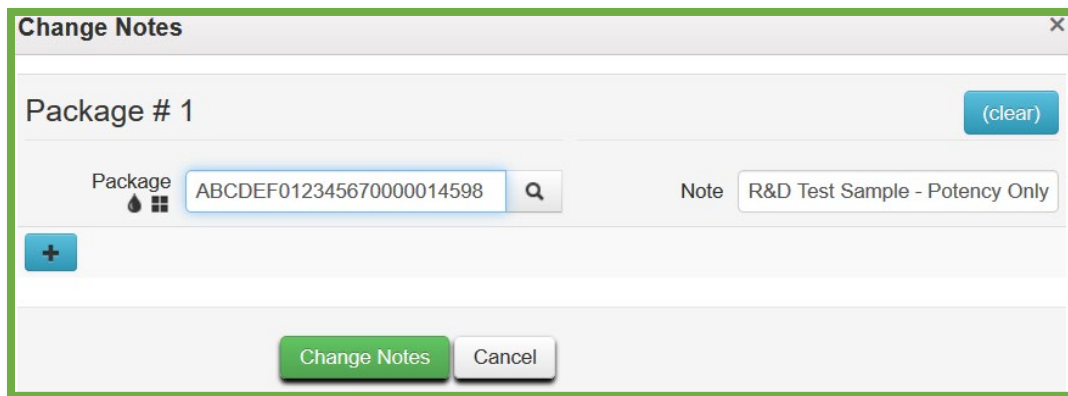


Figure 19: Change Package Notes

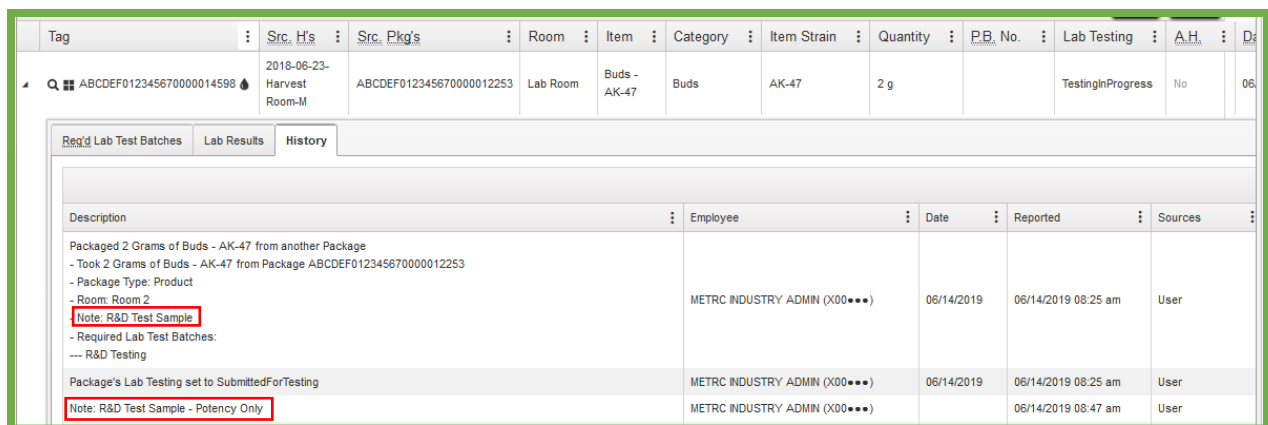


Figure 20: Package History

Montana - Metrc Support Bulletin

Metrc – Industry Training

Metrc provides industry training & education workshops in person and online as well as training guides and videos.

- Register for workshops or classes online at: www.metrc.com/montana
- *You must attend at least one New Business (Level 1) class online before you may register for other classes.*
- *We recommend that all industry users take classes every 3-4 months to stay up to date on any new features or changes.*

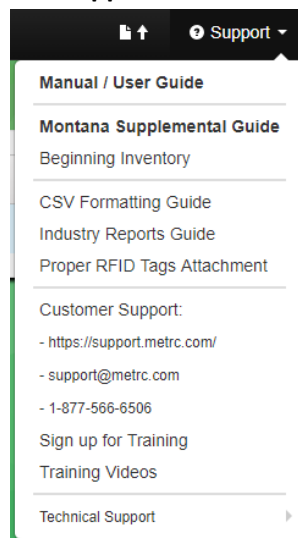
Online classes:

- Metrc New Business (Level 1) – All Facilities
- Metrc Advanced (Level 2) – All Facilities
- Metrc Advanced (Level 2) – Testing Labs (labs must request training via email to Support)

Metrc – Industry Support

Metrc provides live interactive support for industry users and licensees. This information can be found on our website, when logged into Metrc under your Support tab, and is listed below.

Check under the “Support” tab for additional resources.



Please be advised that the new CSV Formatting Guide and Industry Reports Guide are now located under the Support Tab.

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