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| Bulletin No: LA_IB_0035 | Distribution Date: 3/28/22 | Effective Date: 3/21/22 |
| Contact Point: Metrc® Support | Subject: Addition of New Item Categories | |
| Reason: Metrc is providing an update on the addition of the New Adjustment Reason: Trimming following new item categories; Buds (Bulk), Flower (Final Form), Shake/Trim (Bulk), Shake Trim (Final Form), Rosin (Final Form) and Pre-Rolls. | | |

Greetings Metrc Users,

On **March 23 ,2022**, the LDAF added a new Adjustment Reason “Trimming” as well several new item categories for use by the industry in Metrc. The item categories that have been added and explanation as to their designated use are as follows:

- Buds (Bulk)
- Kief (Final Form)
- Flower (Final Form)
- Shake/Trim (Bulk)
- Shake/Trim (Final Form)
- Pre-Roll
- Rosin (Final Form)

Bud (Bulk) is weight based and has no approval requirements upon creation. For more information see Metrc LA Bulletin 16.

Pre-Roll is a final form product requiring strain and weight. Pre-Rolls are created from flower at the manufacturing level. This will require product photo, label, and packaging photos for approval.

Flower (Final Form) item category requires strain, unit weight and description. The pre-form of Flower (Final Form) to be used is Buds (Bulk) category requiring strain and weight. Flower (Final Form) requires the item approval process.

Kief (Final Form) item category requires description and unit weight. Please note, this item is count based (each). This item is derived from the Concentrate category and requires the item approval process.

Rosin (Final Form) item category requires description, unit CBD content, unit THC content, and unit weight. It also requires the item approval.

Shake/Trim (Bulk) item category is weight based and has no requirements upon creation.

Shake/Trim (Final Form) item category requires strain, unit weight, and description. It also requires the item approval process.

Please use grams as your standard unit of measure when using Metrc.

**** The Bulk item category is not to be used for any final products that are for transfer and sale to the pharmacy. Those products that are identified in the system containing Final Form in the name i.e., Flower (Final Form), Shake/Trim (Final Form), including all Final Form categories require the item approval process.**

If a bulk item is incorrectly used, please contact Metrc support for assistance in making this correction at support@metrc.com or 877-566-6506.

Creating (Bulk) Item Category

A Bulk item category has been added to allow for creating packages that are to be utilized during product manufacturing. Bulk Items are only to be used within Production licenses and **cannot** be transferred or sold to the pharmacy. Any packages of manufactured product that are transferred to the pharmacy or sold to a retailer must utilize a non-bulk item category with the required information namely the item categories with Final Form in the name.

For example, Flower is being pulled from the harvest then generating a production batch of a large amount of Buds (Bulk) being packaged. To do this, the item would need to be created for the Buds (Bulk) category. An Item can be created by selecting Items in the Admin area drop down menu, then clicking the Add Items button in the Items grid. These steps are demonstrated in **Figures 1 and 2** below.

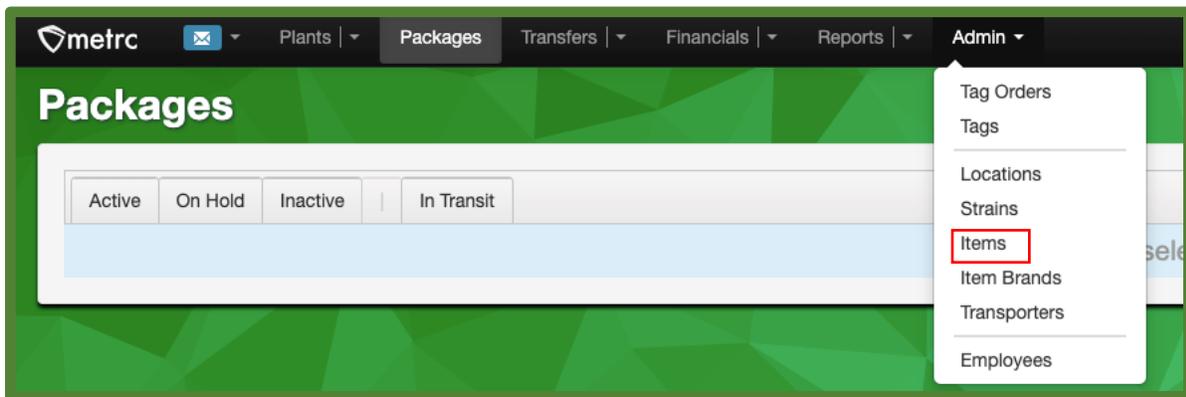


Figure 1: Adding Items

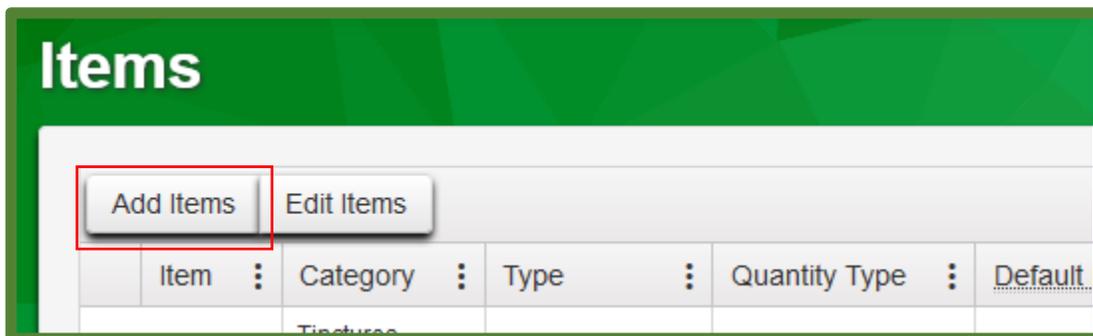
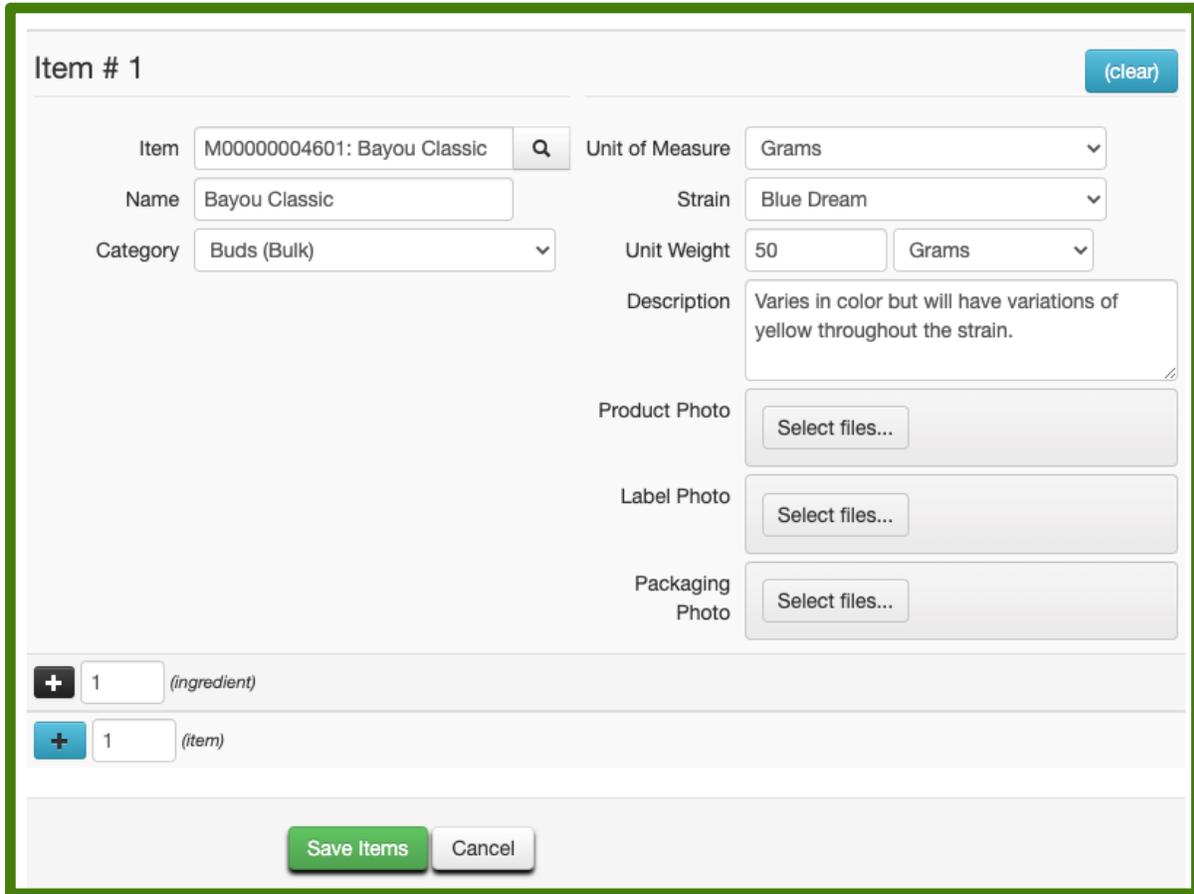


Figure 2: Adding Items Button

Once in the Add Items action window, add the information necessary. When creating an Item using a (Bulk) item category, the necessary information includes the Item Name, proper (Bulk) item category, Unit of Measure, Unit Weight, Description. No photos are required for Bulk item categories. See examples of creating (Bulk) item below in **Figures 3 and 4**.



The screenshot shows a web form titled "Item # 1" with a "(clear)" button in the top right. The form is divided into two columns. The left column contains: "Item" (text input with "M00000004601: Bayou Classic" and a search icon), "Name" (text input with "Bayou Classic"), and "Category" (dropdown menu with "Buds (Bulk)"). The right column contains: "Unit of Measure" (dropdown menu with "Grams"), "Strain" (dropdown menu with "Blue Dream"), "Unit Weight" (text input with "50" and a "Grams" dropdown), and "Description" (text area with "Varies in color but will have variations of yellow throughout the strain."). Below these are three "Select files..." buttons for "Product Photo", "Label Photo", and "Packaging Photo". At the bottom left, there are two rows of quantity controls: a black "+" button with "1" and "(ingredient)", and a blue "+" button with "1" and "(item)". At the bottom center, there are "Save Items" and "Cancel" buttons.

Figure 3: Creating a Buds (Bulk) Item (no photos required)

Add Items ✕

Item # 1 (clear)

| | | | |
|----------|--|-----------------|--|
| Name | <input type="text" value="Southern Classic"/> | Unit of Measure | <input type="text" value="Ounces"/> |
| Category | <input type="text" value="Shake/Trim (Bulk)"/> | Product Photo | <input type="button" value="Select files..."/> |
| | | Label Photo | <input type="button" value="Select files..."/> |
| | | Packaging Photo | <input type="button" value="Select files..."/> |

(ingredient)

(item)

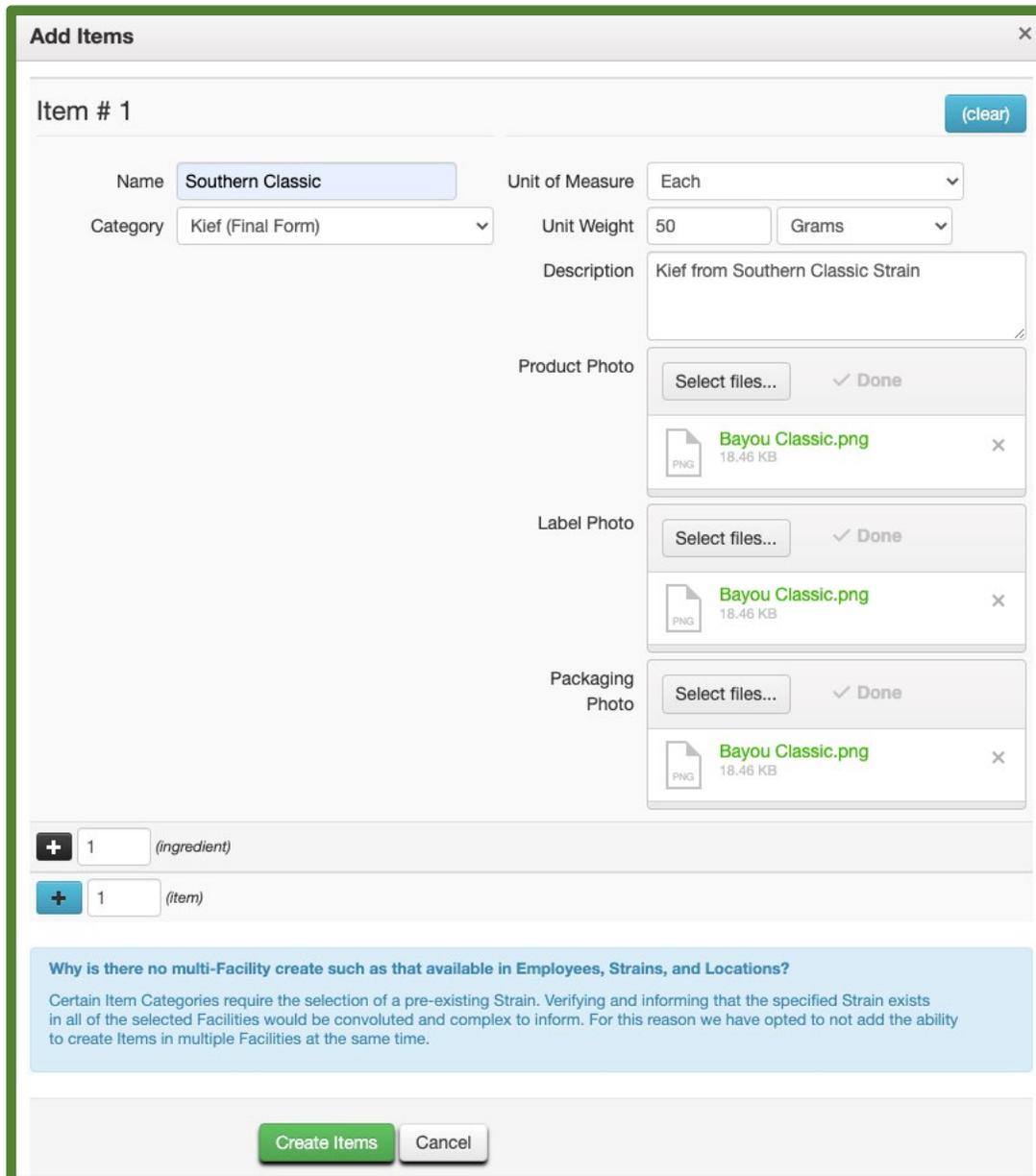
Why is there no multi-Facility create such as that available in Employees, Strains, and Locations?

Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

Figure 4: Creating a Shake/Trim (Bulk) Item Category (no photos required)

Creating Final Form Item Category

When creating an Item using a (Final Form) item category, those items are created in the same action window as the (Bulk) item category. Once in the Add Items action window, add the required information necessary including the Item Name, proper (Final Form) item category, Unit of Measure, Unit Weight, Descriptions, Product Photo, Label Photo, and Packaging Photo. Keep in mind that (Final Form) item categories will be packaged in individual units for sale to the pharmacy. This is shown in **Figure 5**.



The screenshot shows the 'Add Items' window with the following details:

- Item # 1** (clear button)
- Name:** Southern Classic
- Category:** Kief (Final Form)
- Unit of Measure:** Each
- Unit Weight:** 50 Grams
- Description:** Kief from Southern Classic Strain
- Product Photo:** Select files... Done. Uploaded: Bayou Classic.png (18.46 KB)
- Label Photo:** Select files... Done. Uploaded: Bayou Classic.png (18.46 KB)
- Packaging Photo:** Select files... Done. Uploaded: Bayou Classic.png (18.46 KB)
- Ingredient list:** 1 (ingredient), 1 (item)
- Footer:** Create Items, Cancel

Why is there no multi-Facility create such as that available in Employees, Strains, and Locations?
Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

Figure 5: Create Kief (Final Form) Item (photos required). (Approval process Required)

Creating the (Bulk) Item Production Batch Package

Once the items have been created, a production batch package of the Buds (Bulk) item will need to be created from the harvest first. To accomplish this, go to the Plants area and select the Harvested tab. Select the harvest the Buds (Bulk) item is being packaged from, then select the Create Packages button to open an action window as shown in **Figure 6**. In the action window, the production batch package using the Buds (Bulk) item can be created. This process is demonstrated below in **Figure 7** below.

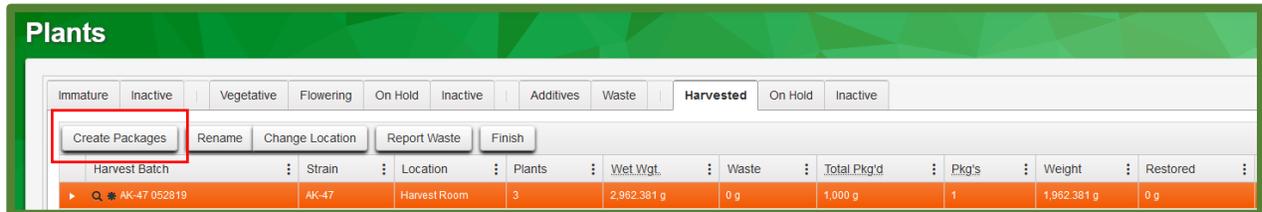


Figure 6: Selecting a Harvest to Create a Package

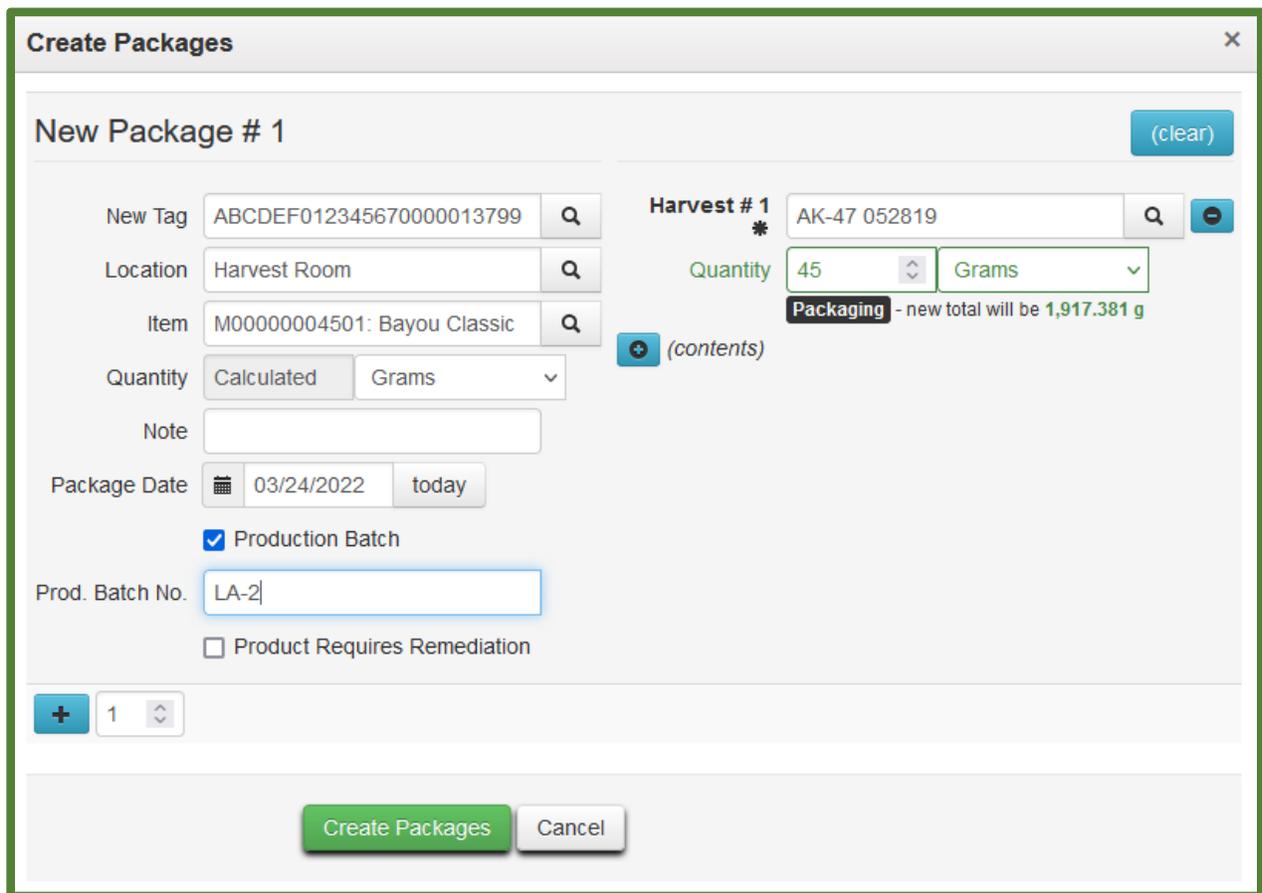


Figure 7: Creating a Package from the Harvest

This same process should be followed for packaging all (Bulk) items including Kief (Bulk), Shake/Trim (Bulk), and Rosin (Bulk).

Creating (Final Form) Production Batch Package

Once the Buds (Bulk) package has been created, the production batch package of Flower (Final Form) item package can be created. To do this, go to the Packages grid and select the Buds (Bulk) package being pulled from and select the New Packages button as shown in **Figure 8**. This will open an action window to create the new production batch of the Flower (Final Form) item that was previously created. This process is demonstrated below in **Figure 9** below.

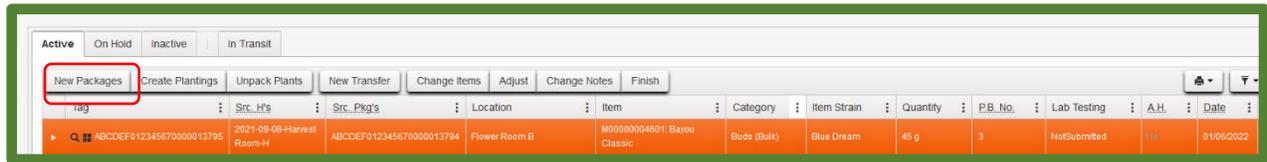


Figure 8: Select Buds (Bulk) Package and Select New Packages

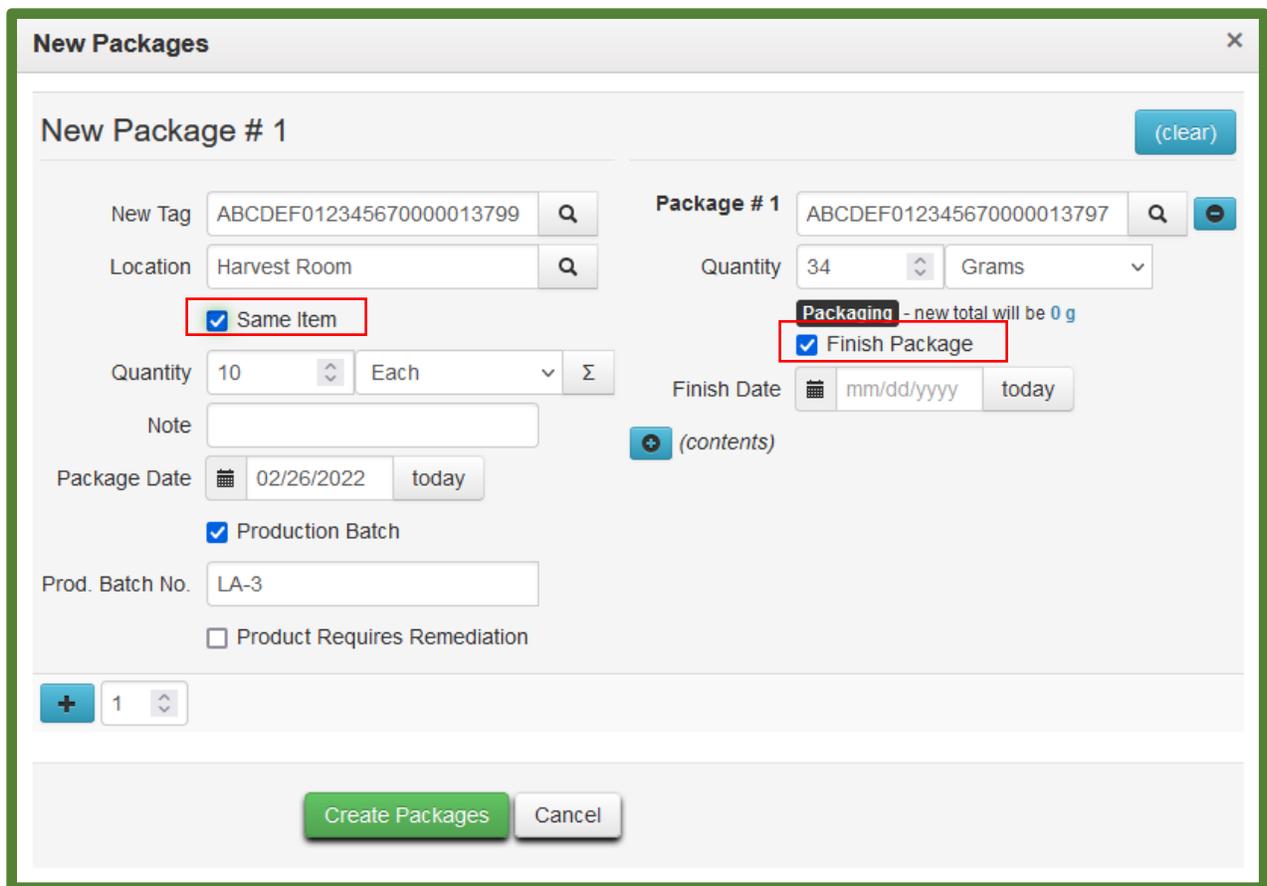


Figure 9: Creating a (Final Form) Production Batch while Using Same Item and Finishing Package

*** Please note, selecting **Finish Package** is a shortcut that tells Metrc that you are finished creating packages from the production batch and have exhausted your inventory, thus retiring it from use. It will appear grayed out in the packages grid. If errors occur, you can adjust the package. Also, selecting **Same Item** is a shortcut that tells Metrc that you are creating a*

package using the same item name as the source package selected and don't need to use a new item. Both options are shown below in **Figure 5**.

This same process can be followed for packaging all (Final Form) items including Kief (Final Form), Shake/Trim (Final Form), and Rosin (Final Form).

Trimming Adjustment Reason

A new Trimming package adjustment reason has been added to be used to explain a change in weight for trimming. Metrc calculates the new total, or the adjusted amount based on the data input. Note: The UoM (unit of measure) is restricted – you cannot change the current UoM by switching from grams to ounces and so on. If using the New Quantity box, the Unit of Measure will automatically reflect the same as the current package. However, if using the Adj. Quantity box, the UoM that must be selected must be consistent with the current UoM (weight-based – weight-based or count-based – count-based). The system will give an error notification if trying to use different units of measure. A package can still be finished in the Adjust Packages action window as well if the package is being emptied. This is demonstrated below in **Figures 19 and 20**.

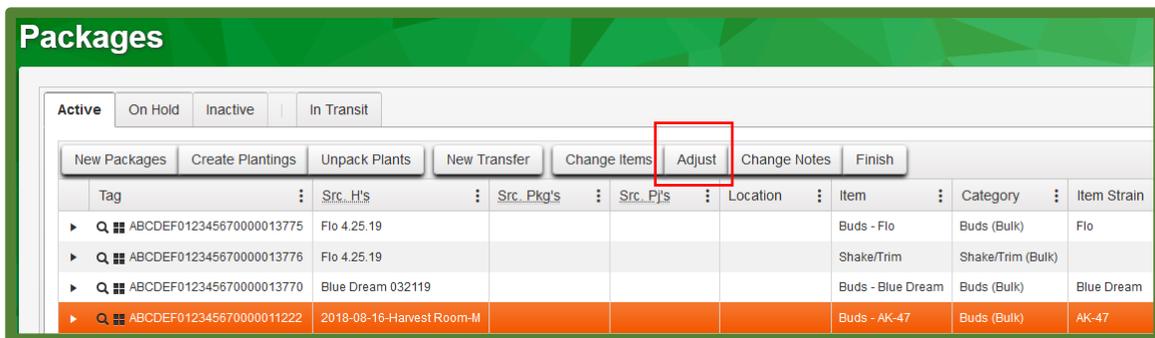
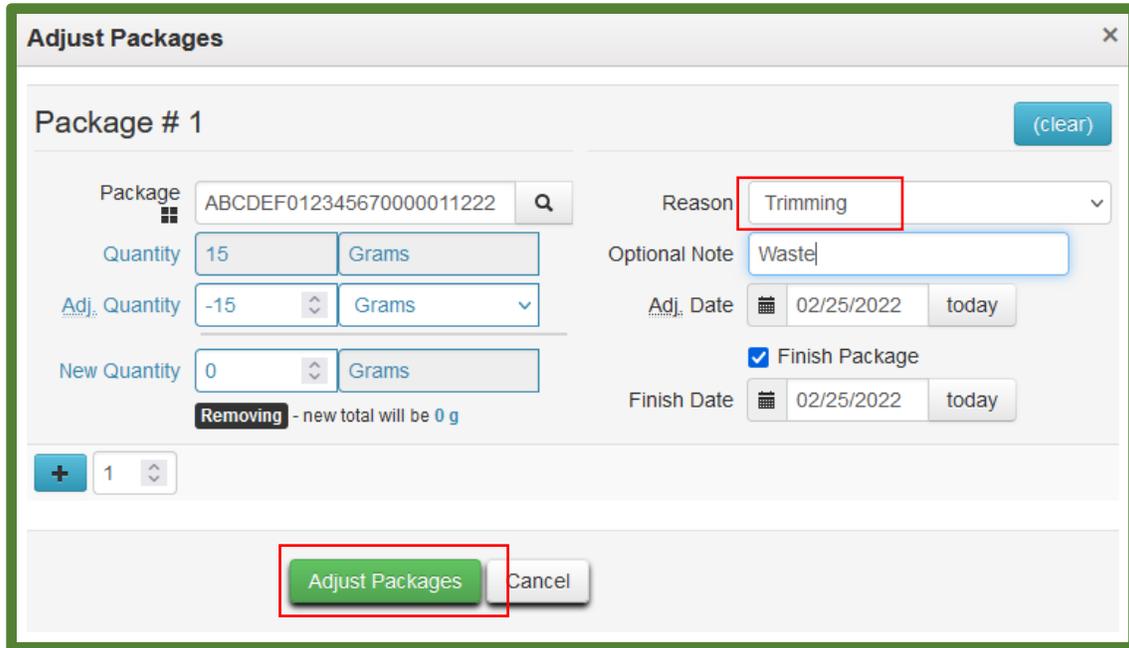


Figure 19: Select Package & Click Adjust Button



Adjust Packages

Package # 1 (clear)

Package ABCDEF012345670000011222

Quantity 15 Grams

Adj. Quantity -15 Grams

New Quantity 0 Grams

Removing - new total will be 0 g

Reason Trimming

Optional Note Waste

Adj. Date 02/25/2022 today

Finish Date 02/25/2022 today

Finish Package

Adjust Packages Cancel

Figure 20: Trimming Adjustment Reason

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

For access to Metrc training and additional bulletins please follow the link [here](#) for more information.