

## Nevada - Metrc Support Bulletin

<b>Bulletin Number:</b> NVIB#028_082319	<b>Distribution Date:</b> 08/23/19	<b>Effective Date:</b> 08/23/19
<b>Contact Point:</b> Support@metrc.com	<b>Subject:</b> Release Memo - New Features	
<b>Reason:</b> Metrc is providing details on new features & functionality within Metrc.		

Greetings Metrc® Users,

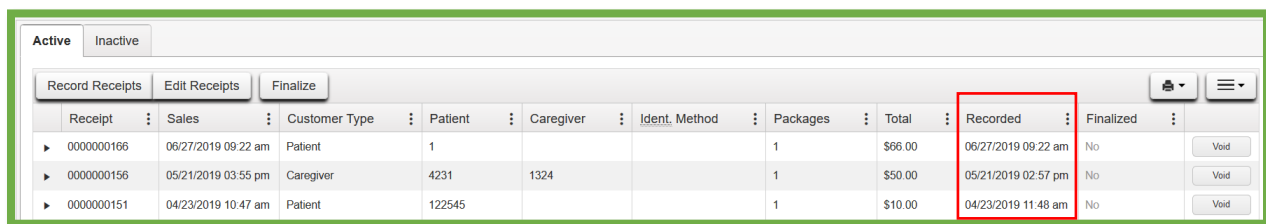
Metrc is pleased to provide information on our newest enhancements within the software.

- 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.

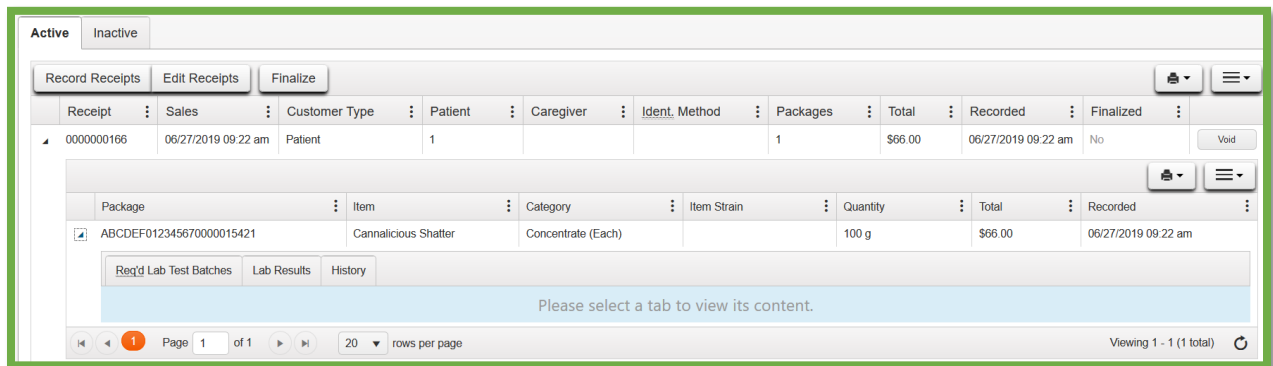


Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized	
▶ 000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No	Void
▶ 000000156	05/21/2019 03:55 pm	Caregiver	4231	1324		1	\$50.00	05/21/2019 02:57 pm	No	Void
▶ 000000151	04/23/2019 10:47 am	Patient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



The screenshot displays the Metrc interface for a sales receipt. At the top, there are tabs for 'Active' and 'Inactive'. Below these are buttons for 'Record Receipts', 'Edit Receipts', and 'Finalize'. The main table has columns: Receipt, Sales, Customer Type, Patient, Caregiver, Ident, Method, Packages, Total, Recorded, and Finalized. A row is shown with a drill-down arrow next to the 'Packages' column. Clicking this arrow opens a sub-menu with three options: 'Req'd Lab Test Batches', 'Lab Results', and 'History'. The 'Req'd Lab Test Batches' option is selected, and a message 'Please select a tab to view its content.' is displayed. The bottom of the interface shows a pagination bar with 'Page 1 of 1', '20 rows per page', and 'Viewing 1 - 1 (1 total)'.

Receipt	Sales	Customer Type	Patient	Caregiver	Ident, Method	Packages	Total	Recorded	Finalized
0000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No

Package	Item	Category	Item Strain	Quantity	Total	Recorded
ABCDEF012345670000015421	Cannalicious Shatter	Concentrate (Each)		100 g	\$66.00	06/27/2019 09:22 am

Req'd Lab Test Batches | Lab Results | History

Please select a tab to view its content.

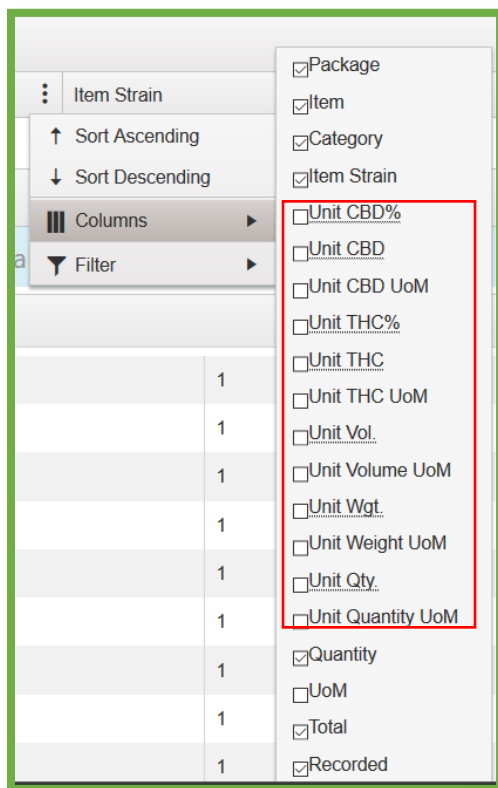
Page 1 of 1 | 20 rows per page | Viewing 1 - 1 (1 total)

**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.

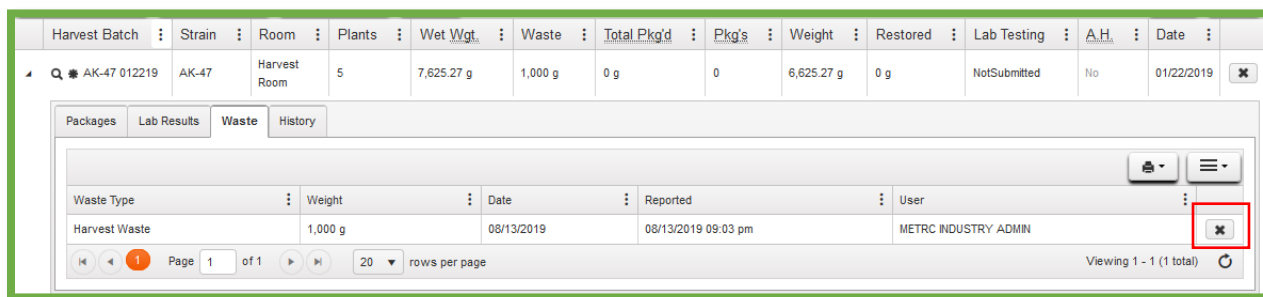
As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.

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

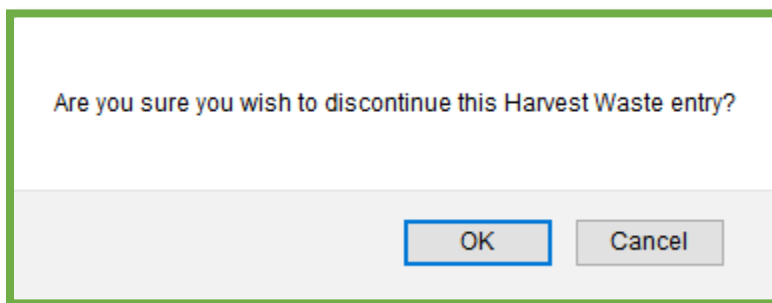
**Figure 4: New Available Columns for Item Information**

## 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.

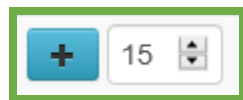
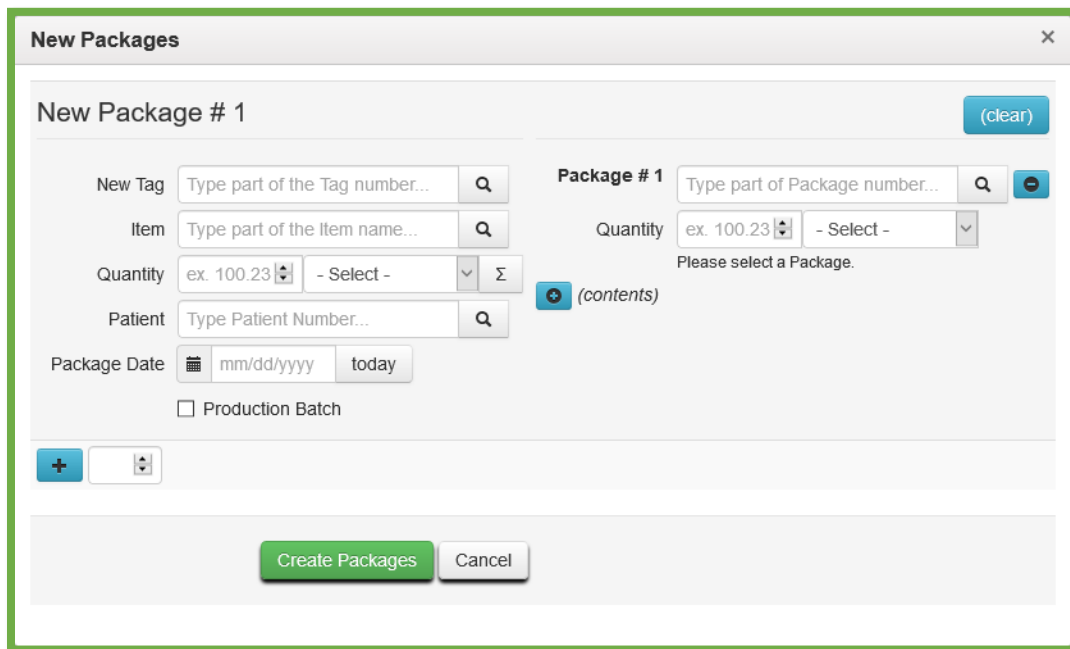
With this information in mind, Metrc has implemented a restriction of 500 rows maximum for each CSV file uploaded into the system. If this maximum is exceeded, the data can be split into separate files that do not exceed the 500-row maximum.

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.



**Figure 8: Adding Packages Enhancement**

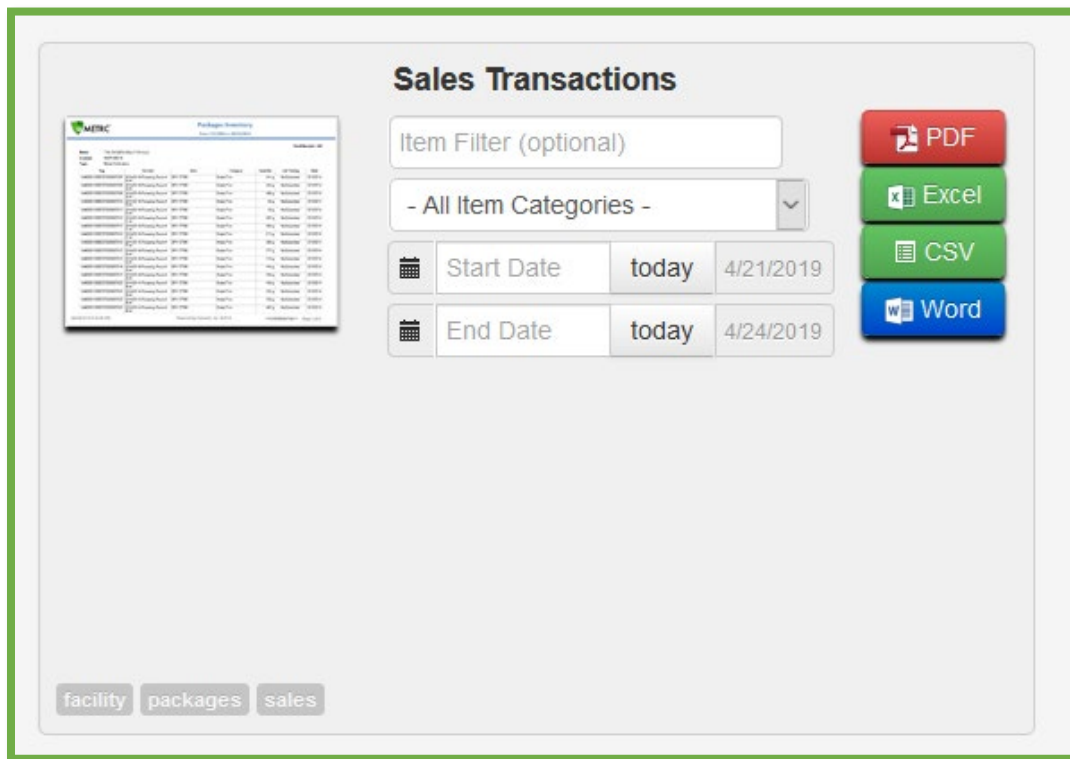
**\*\* The user may also utilize the up and down arrows to input the desired number of packages.**

### 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.



**Sales Transactions**

Item Filter (optional)

- All Item Categories -

Start Date today 4/21/2019

End Date today 4/24/2019

PDF Excel CSV Word

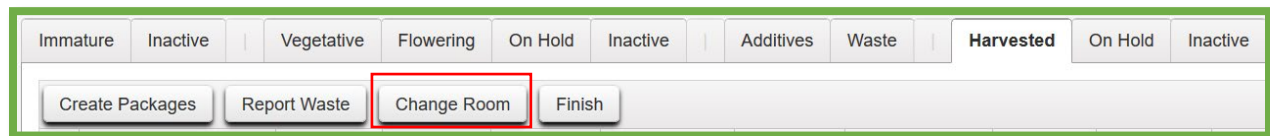
facility packages sales

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.**

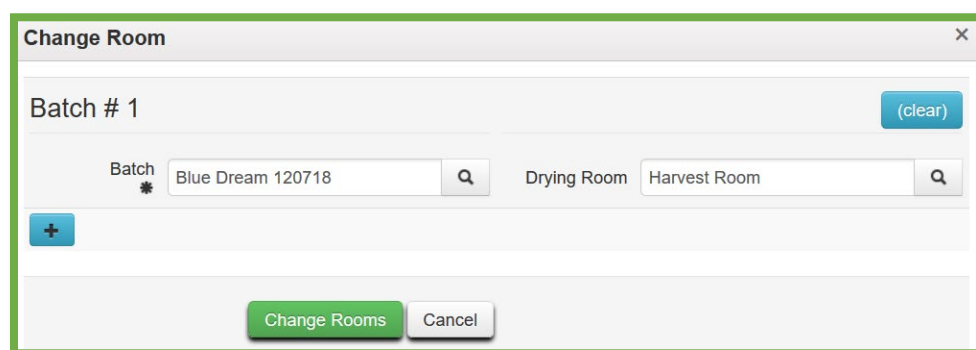
## New Feature: Change Rooms in Harvest

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**

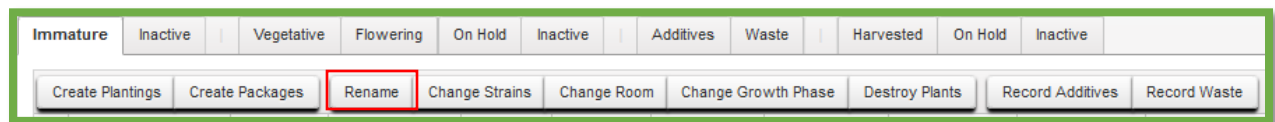
If a user identifies a harvest batch that requires a room update, **Figure 12** is an example on how the change would be made. The user would select the harvest batch in need of a change and click the *Change Room* button. After the selection, the user would see the box below. Selecting the magnifying 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**

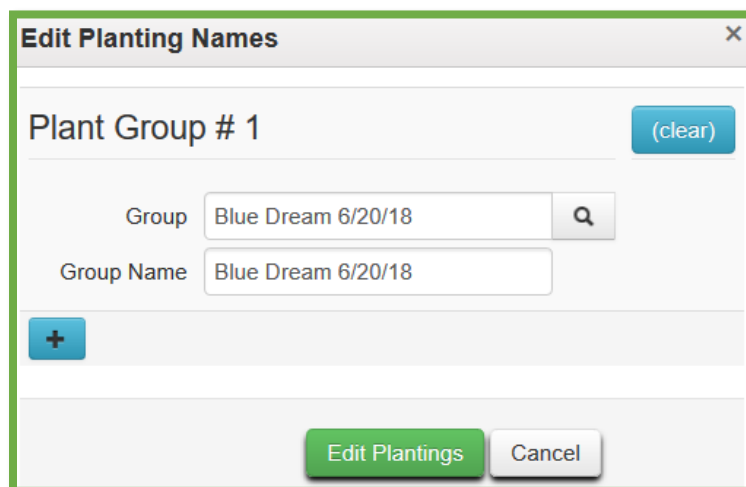
## New Feature: Edit Planting Names

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.

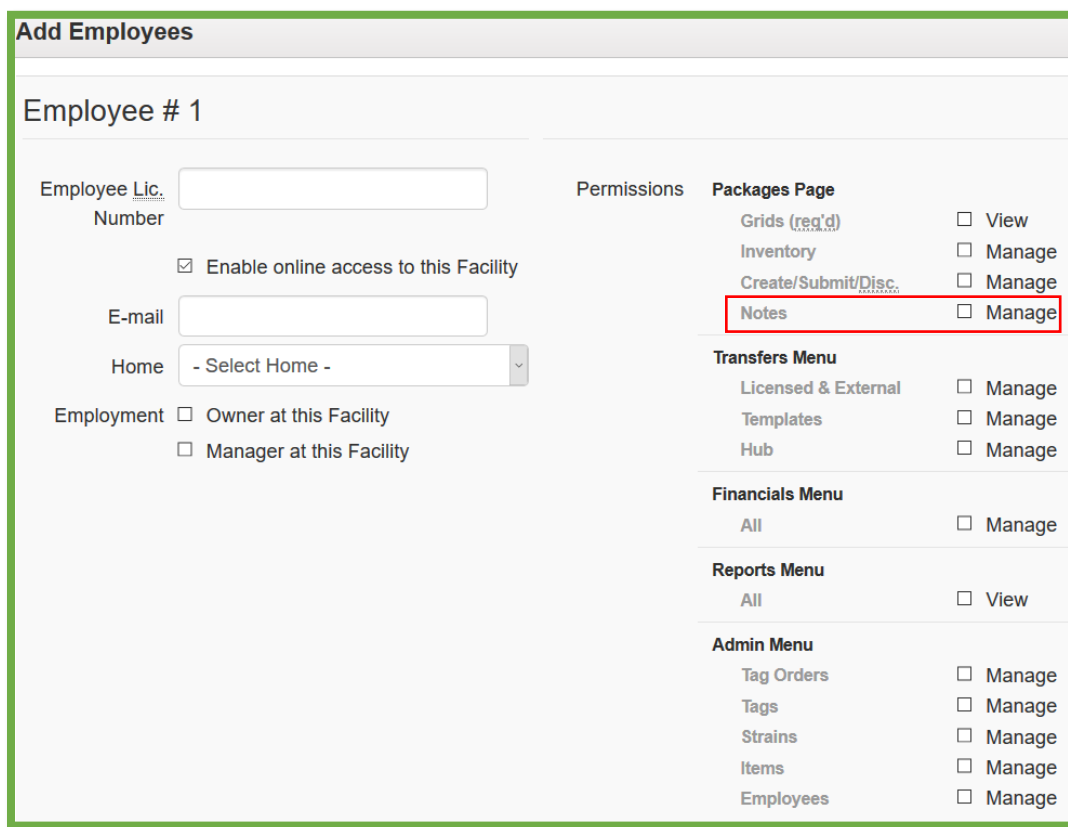


The dialog box is titled 'Edit Planting Names'. It contains a section for 'Plant Group # 1' with a '(clear)' button. Below this, there are two input fields: 'Group' and 'Group Name', both containing the text 'Blue Dream 6/20/18'. There is a search icon (magnifying glass) next to the 'Group' field. At the bottom, there is a green 'Edit Plantings' button and a grey 'Cancel' button.

**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 licensees inventory.



**Add Employees**

Employee # 1

Employee Lic. Number

☒ Enable online access to this Facility

E-mail

Home

Employment ☐ Owner at this Facility  
☐ Manager at this Facility

**Permissions**

**Packages Page**

Grids (reg'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
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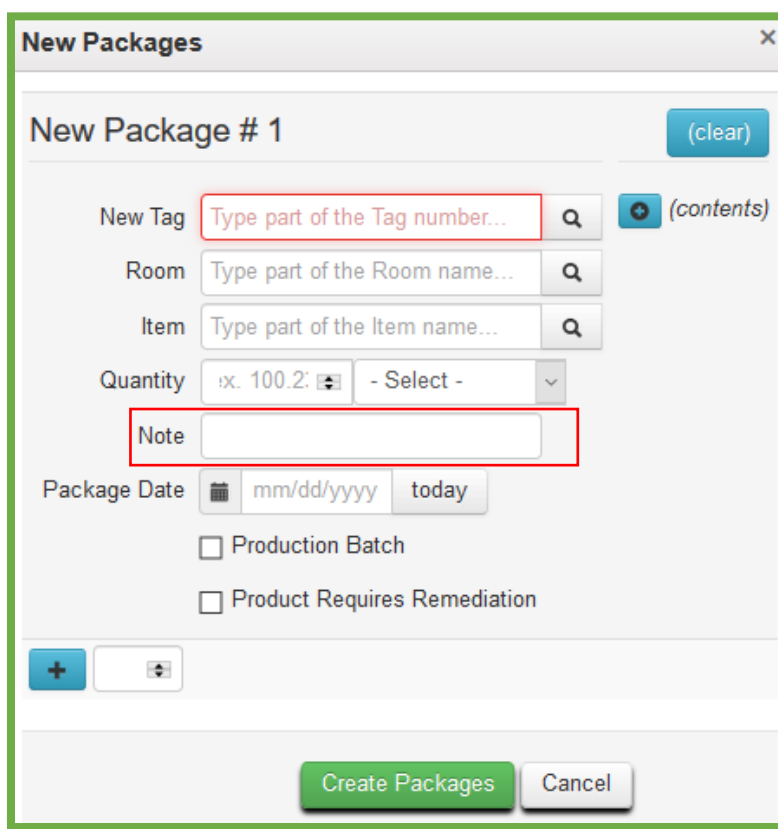
**Reports Menu**

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**



**New Packages**

New Package # 1 (clear)

New Tag  Q + (contents)

Room  Q

Item  Q

Quantity  - Select -

Note

Package Date  today

☐ Production Batch

☐ Product Requires Remediation

+ ⬇

Create Packages Cancel

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	
	METRC INDUSTRY ADMIN (X00***)	06/14/2019	06/14/2019 08:25 am	User	

Page 1 of 1 20 rows per page Viewing 1 - 2 (2 total)

Figure 17: Package History

## 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**.

Active

On Hold

Inactive

New Packages

Submit for Testing

Remediate

Create Plantings

Unpack Plants

New Transfer

Change Rooms

Change Items

Change Req'd LTBs

Change Notes

Adjust

Finish

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

### Figure 18: Packages Change Notes

Change Notes

Package # 1

(clear)

Package

ABCDEF012345670000014598

Q

Note

R&D Test Sample - Potency Only

+

Change Notes

Cancel

### Figure 19: Change Package Notes

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

Req'd Lab Test Batches

Lab Results

History

Description	Employee	Date	Reported	Sources
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 <div>Note: R&amp;D Test Sample</div>	METRC INDUSTRY ADMIN (X00●●●)	06/14/2019	06/14/2019 08:25 am	User
Package's Lab Testing set to SubmittedForTesting <div>Note: R&amp;D Test Sample - Potency Only</div>	METRC INDUSTRY ADMIN (X00●●●)	06/14/2019	06/14/2019 08:25 am	User
	METRC INDUSTRY ADMIN (X00●●●)		06/14/2019 08:47 am	User

### Figure 20: Package History

## 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/nevada](http://www.metrc.com/nevada)
- *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.*

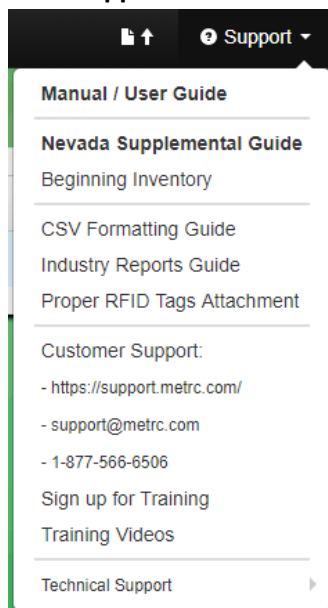
### Online classes:

- 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](mailto:support@metrc.com) or 877-566-6506 with any questions.