

Bulletin Number: NV_IB_0045	Distribution Date: 1/22/21	Effective Date: 2/8/21
Contact Point: Metric® Support	Subject: New and Revised Transfer Types	
Reason: Metric is providing details on the revision of Transfer Types, the new Transfer Type that will be available and refreshers on how to finish packages, sales receipts and sales deliveries		

Greetings Metric® Users,

This bulletin is intended to notify all industry users of the upcoming revision of the current Transfer Types and a new Transfer Type that will be available. Below you can find more details on the Transfer Types available starting 2/8/21.

Along with the notice, Metric is providing guidance on how to finish/unfinish packages and how to finalize/unfinalize sales receipts.

Revised Transfer Types as of 2/8/21

TRANSFER TYPE:	DESCRIPTION:	Requires Approval:	Requires monetary value
Wholesale Transfer - Initial	To be utilized by cultivation facilities on the 1 st transfer. Always a taxable event.	N	Y
Wholesale Transfer - (Subsequent)	To be utilized by Production facilities and/or transfers of cannabis products AFTER an initial transfer has been executed ONLY . Licensees are required to keep record of initial transfer.	N	Y
Wholesale Return	To be used to physically return cannabis product to the originating facility.	N	Y
Virtual Transfer (State Approved)	STATE APPROVED ONLY. To correct transfer variances AFTER received in Metrc. Requires a copy of the correspondence from the state authorizing the transfer to be kept on file with the licensee.	Y	Maybe
Lab Transfer	Utilized ONLY to transfer lab sample to and from a licensed lab.	N	N
Patient Donation - External	Utilized to accept cannabis donations by state authorized patient card holders. Patient ID numbers must be valid in the State of Nevada.	N	N
Compliance/Law Enforcement - External Transfer	ONLY to be used for seizure of cannabis products by CCB or Law Enforcement. Requires a copy of seizure notice to be kept on file and incident report filed with CCB.	Y	N

Figure 1: Revised Transfer Types coming on 2/8/21

Finishing Packages

Metrc plant and package tags are designated for a one-time use only. This means once a plant is harvested, destroyed, or assigned a replacement tag the original plant tag will transition to the inactive tab.

Metrc would like to provide guidance on when to finalize package tags. Once all useable marijuana has been either repackaged, sold, or adjusted down to a quantity of zero, you will need to finish the package in Metrc. Once a package is at a quantity of zero, you will notice that it is greyed out; reminding you to finish the package.

To finish a package with a zero quantity on the Active tab in the Packages grid, select the package that need to be finished. Once selected, use the "Finish" button as seen in **Figure 2** which opens an action window. In **Figure 3**, use the action window to confirm the package you are finishing and enter the date. Then select the green "Finish Packages" button.

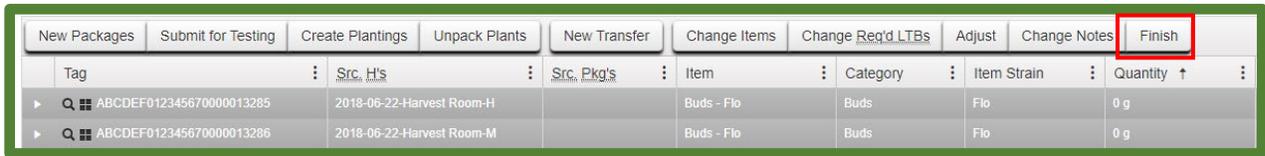


Figure 2: Highlighting multiple packages to finalize

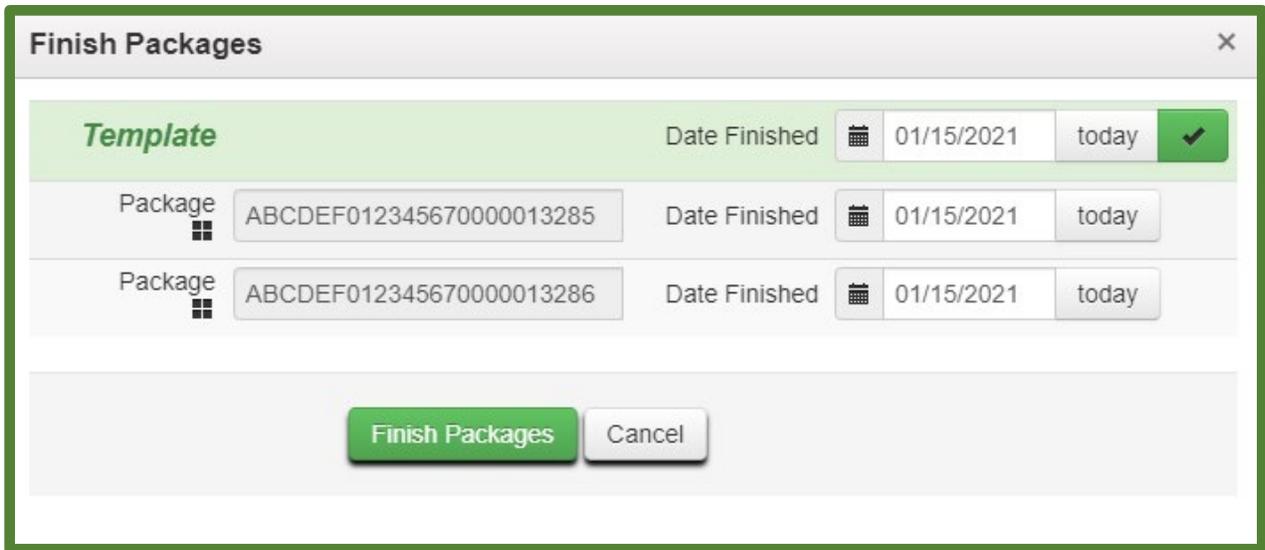


Figure 3: Finish Multiple Packages

A package can also be finished when a package is being emptied when creating a new package. In the action window when creating the new package, located on the right-hand side there is a box to select for “Finish Package”. This box can be checked when the package on the right-hand side is being zeroed out and used to create a new package as shown in **Figure 4**.

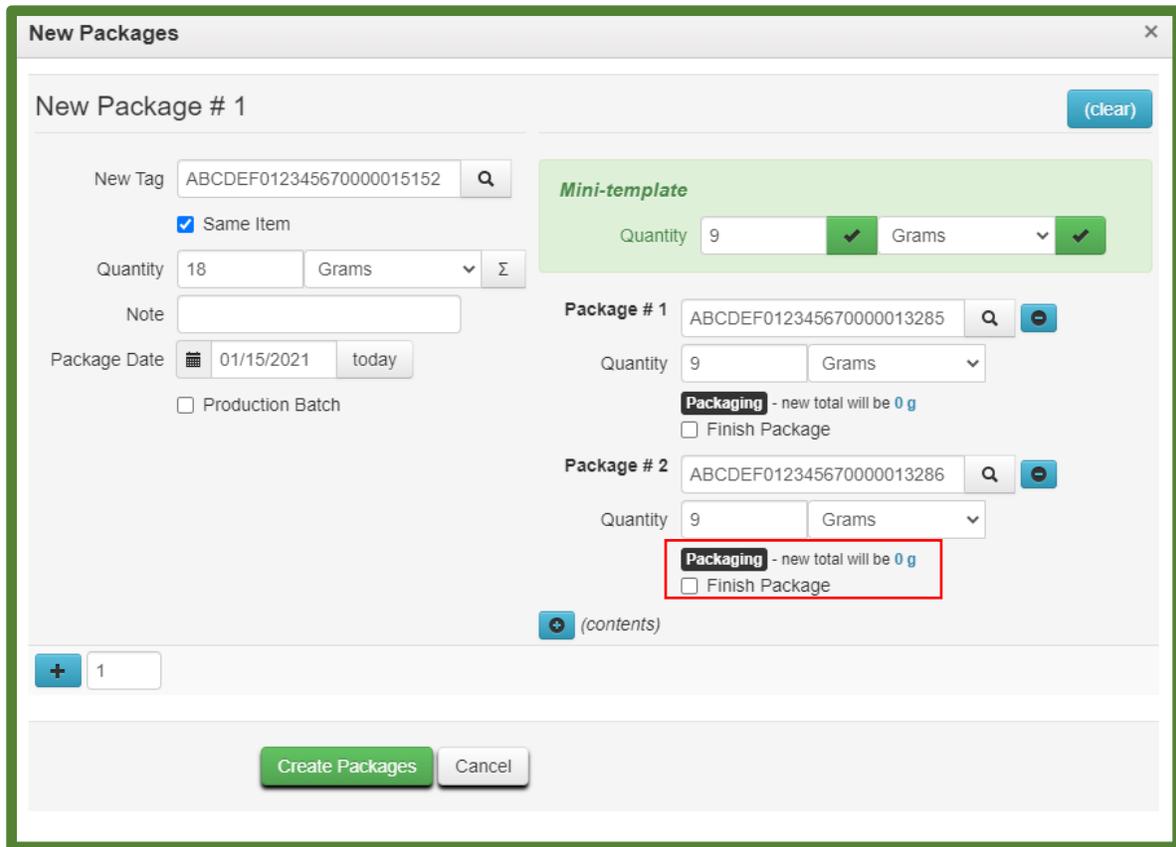


Figure 4: Finishing Packages from New Packages at zero quantity

To unfinish a package, navigate to the Inactive tab on the Packages grid and select the package that the sales action is to be performed. Once selected, use the "Unfinish" button as seen in **Figure 5** below and confirm the package you are unfinishing in the action window that follows. Once the package is unfinished, the user can make take any updates required.

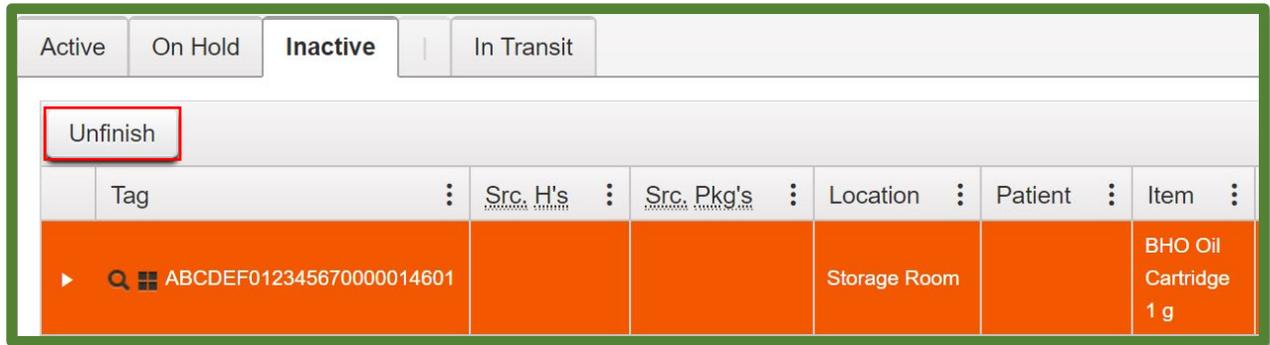
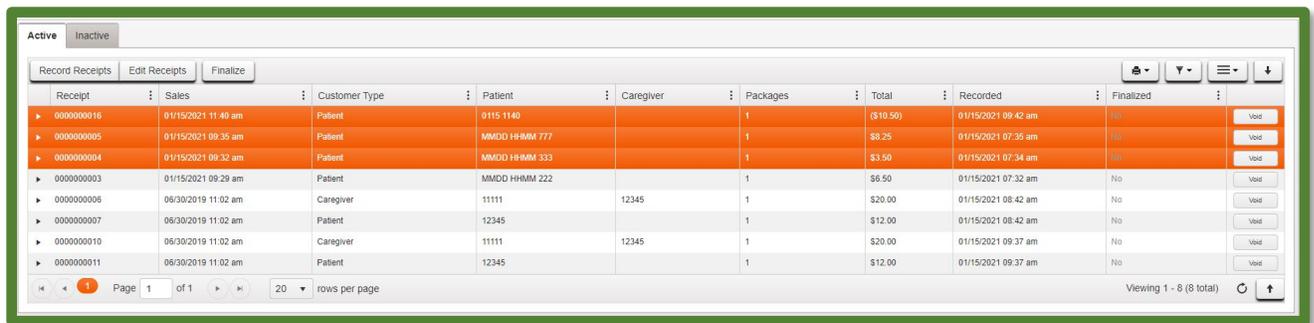


Figure 5: Unfinish Package Action Window

Sales Receipt Finalize and Unfinish Buttons

Metrc would like to provide further guidance on finalizing sales receipts. It is recommended that those licensees who report sales into the system, finalize receipts in Metrc periodically. Finalizing the receipts will improve system performance in the sales area and decrease the editing times for receipts if your active receipts total exceeds 100,000 receipts. The Sales Receipt section of Metrc was previously updated to include two new buttons: Finalize and Unfinalize. A new Finalized column (which is filterable) has been added to the Sales Receipt grid along with an Active and Inactive tab as shown in **Figure 6**. All finalized sales can be found within the inactive tab. This is similar to how the Active and Inactive packages tabs function.

Note: When finalizing multiple sales receipts at once, you should limit the process to 100 receipts at a time.



Receipt	Sales	Customer Type	Patient	Caregiver	Packages	Total	Recorded	Finalized	
0000000016	01/15/2021 11:40 am	Patient	0115 1140		1	(\$10.50)	01/15/2021 09:42 am	No	Void
0000000005	01/15/2021 09:35 am	Patient	MMDD HHMM 777		1	\$8.25	01/15/2021 07:35 am	No	Void
0000000004	01/15/2021 09:32 am	Patient	MMDD HHMM 333		1	\$3.50	01/15/2021 07:34 am	No	Void
0000000003	01/15/2021 09:29 am	Patient	MMDD HHMM 222		1	\$6.50	01/15/2021 07:32 am	No	Void
0000000006	06/30/2019 11:02 am	Caregiver	11111	12345	1	\$20.00	01/15/2021 08:42 am	No	Void
0000000007	06/30/2019 11:02 am	Patient	12345		1	\$12.00	01/15/2021 08:42 am	No	Void
0000000010	06/30/2019 11:02 am	Caregiver	11111	12345	1	\$20.00	01/15/2021 09:37 am	No	Void
0000000011	06/30/2019 11:02 am	Patient	12345		1	\$12.00	01/15/2021 09:37 am	No	Void

Figure 6: Highlighting Multiple Receipts to Finish

When a receipt is no longer active, select the receipt (s) and click the Finalize button. The following window will appear as shown in **Figure 7**. Verify the receipt number and click the “Finalize Sales Receipts” button. **Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing. Larger stores may want to Finalize older Sales Receipts at a faster pace (e.g. on a weekly basis)**

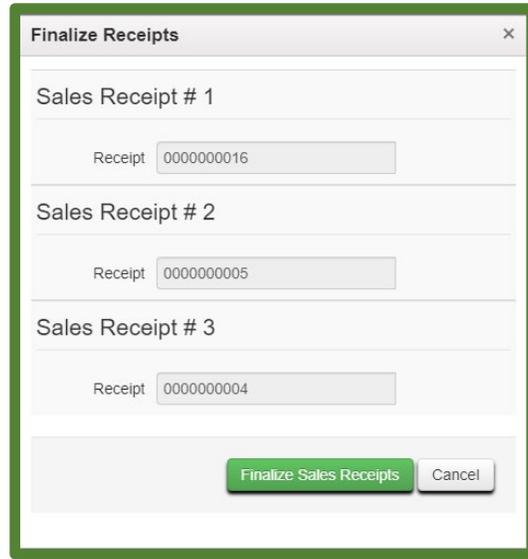


Figure 7: Finalize Sales Receipt Action Window

Finalizing sales receipts will remove the receipt from the list of active receipts Metrc pulls when you edit receipts, which will improve system performance. **Note: Only those receipts not marked as “finalized” will display in the edit receipts window.**

If a “finalized” receipt later needs to be edited, utilize the Unfinalize button on the Sales Receipts grid. Select the desired receipt, then click the Unfinalize button. The following action window will appear as displayed in **Figure 8**. Verify the receipt number and click the “Unfinalize Sales Receipts” button.

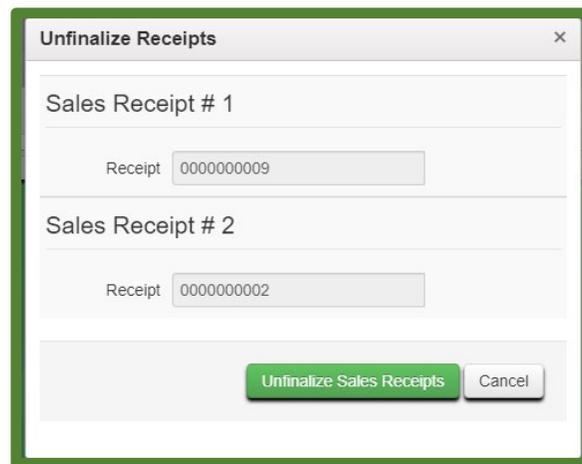


Figure 8: Unfinalize Sales Receipt

Metrc – Industry Training

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

- Register for Metrc classes online at: 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) – One Training for all facility types
- Metrc Advanced (Level 2) – Facility specific training for all facilities
- Metrc Advanced (Level 2) – Testing Facility (These trainings are given once every 6 months)

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 the Support tab, and is shown below.

Check under the “Support” tab for additional resources.



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