

<b>Bulletin Number:</b> NV_IB_0049	<b>Distribution Date:</b> 7/1/21	<b>Effective Date:</b> 7/6/21
<b>Contact Point:</b> Metrc® Support	<b>Subject:</b> New Features in Metrc	
<b>Reason:</b> Metrc is providing an update on our upcoming feature release.		

Greetings Metrc Users,

Metrc is pleased to provide information on our newest enhancements within the software. These enhancements, fixes, or document updates include:

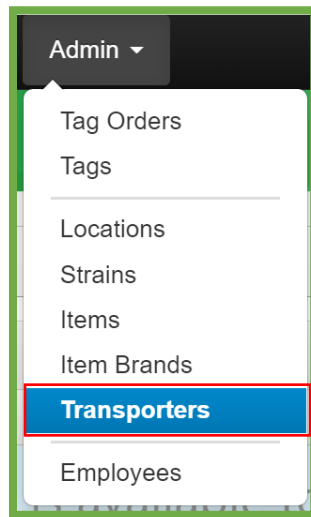
- I. Ability to manage saved drivers and vehicles under the Admin Menu
- II. The new Production Management report available for cultivators
- III. Source Package field for the Package Inventory report
- IV. Ability for shippers to edit packages and destinations on a manifest that has been picked up by a transporter
- V. Optional County field can be recorded on Sales Deliveries
- VI. Fixed CSV Exports in Canned Reports
- VII. Fixed Package History on Sales Delivery Drilldown
- VIII. Updated CSV Formatting Guidelines
- IX. Updated Metrc General Manual
- X. Updated State Supplemental Manual

Please find on the following pages a detailed description of the enhancements:

## **Manage Drivers and Vehicles**

Users now have the ability to manage the saved drivers and vehicle information under their admin area. These saved drivers and vehicles can be used to populate those fields when creating transfer manifests.

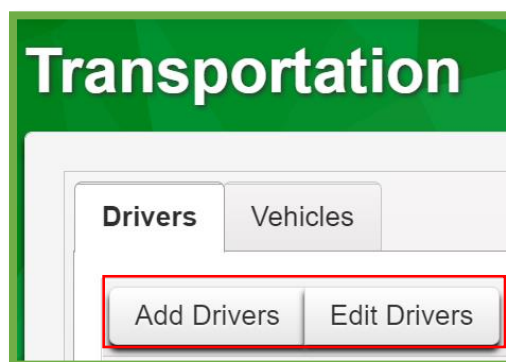
To navigate to this screen, select the Transporter option under the Admin area. This step is show below in **Figure 1**.



**Figure 1: Admin Menu with Transporter Option**

**Please Note:** If this option is not visible, you will need to be granted the permission under the employee admin menu.

Once on the Transporter screen, navigate to either the driver or vehicle tab and use the button to create the entry. This step is demonstrated below in **Figure 2**.



**Figure 2: Add Driver Button**

This button will trigger an action window to enter the driver's information. This step is demonstrated for drivers below in **Figure 3**.



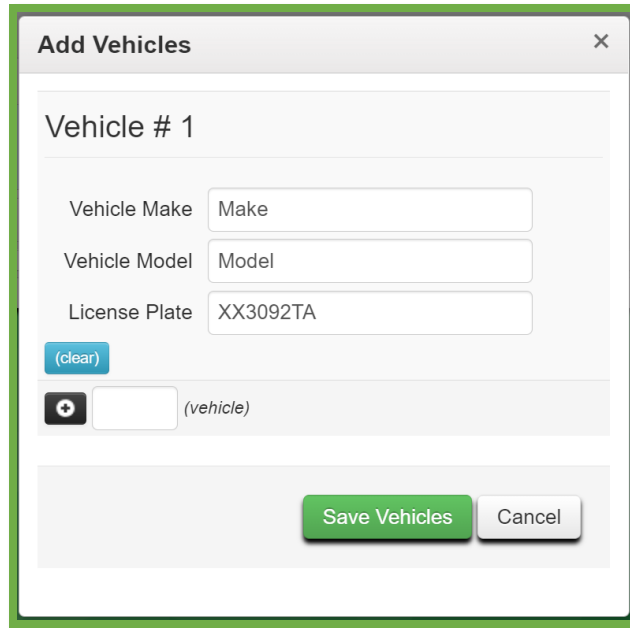
**Figure 3: Add Driver Action Window**

Once the information is entered, save the driver to be used when creating transport manifests.

To save vehicle information this process is repeated under the Vehicle tab. This process is demonstrated below in **Figure 4** and **Figure 5**.



**Figure 4: Add and Edit Vehicle Buttons**



**Figure 5: Add Vehicle Action Window**

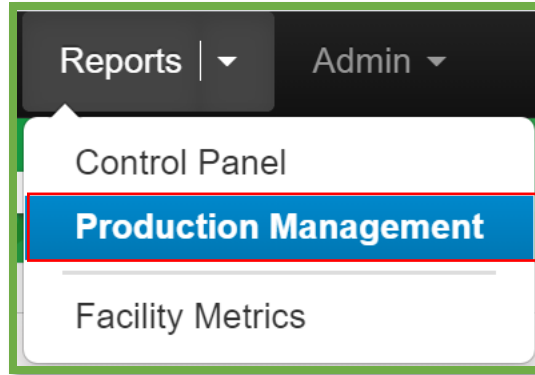
## **Production Management Report**

Users at Cultivation licenses will now be able to run an advanced report that will provide the following data points over a given data range (no longer than six months):

- Max Plants – *Maximum Number of Plants During Time Period*
- Average Plants – *Average Number of Plants in Veg/Flowering During Time Period*
- Percentage of Max Plants – *Average Number of Plants During Time Period Divided by Max Plants*
- Harvested Weight Packaged – *Total Weight Packaged from Harvest During Time Period*
- Harvested Weight Transferred – *Total Weight Transferred during Time Period*
- Percentage of Harvested Weight Transferred – *Total Weight Transferred Divided by Total Weight Packaged from Transfer During Time Period*

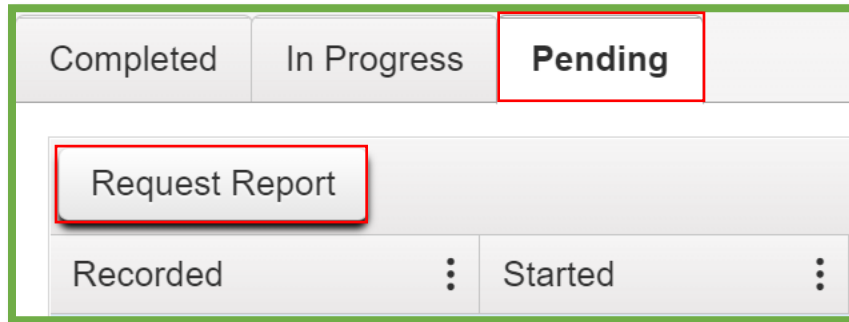
**Please Note:** This is intended to be an additional report to utilize and not one that is required to use at this time.

To navigate to the Production Management Report screen, select the option under the Reports area. This step is demonstrated below in **Figure 6**.



**Figure 6: Navigate to the Production Management Report**

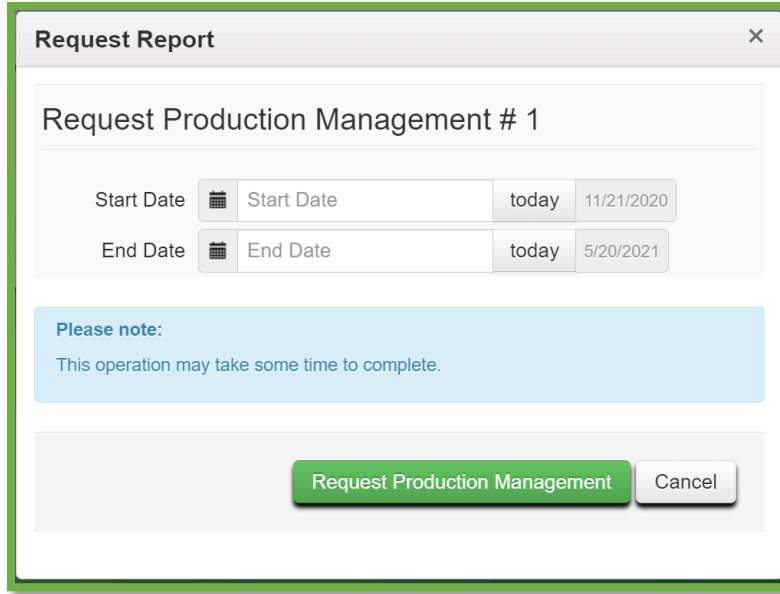
Once on the Production Management Report screen, select the Pending tab and use the “Request Report” button to initiate the process. This step is demonstrated below in **Figure 7**.



**Figure 7: Pending Report Tab and Request Report Button**

This button will initiate an action window to select the date range of the report. This step is demonstrated in **Figure 8** below.

**Note:** The date range must be less than 180 days or the report will not run.



**Figure 8: Request Production Report Action Window**

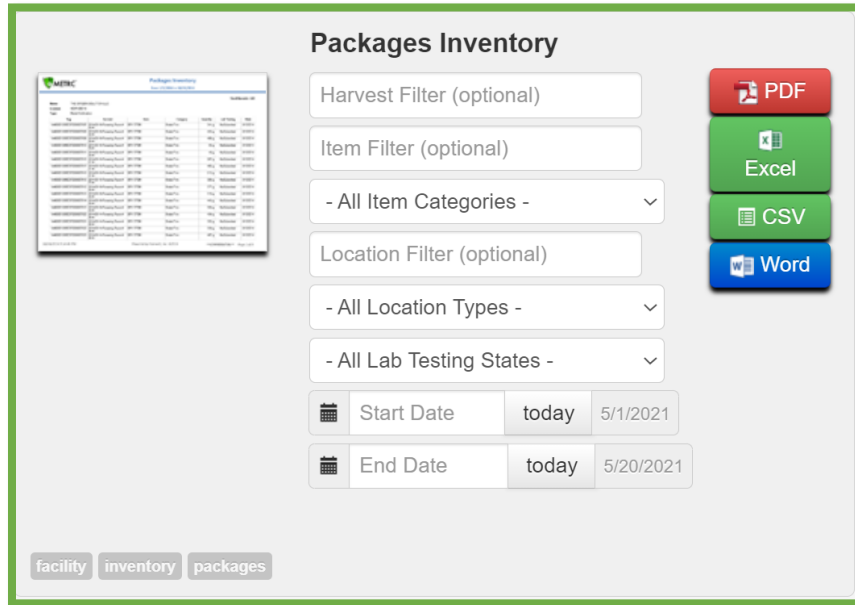
The request will remain under the Pending tab until it is moved to the In Progress Tab. Once completed, all the information will be made available under the Complete tab. This step is demonstrated in **Figure 9** below.

Production Management Report						
Completed		In Progress	Pending			
Recorded	Started	Completed Date	Beginning Period	Ending Period	Completed	
05/20/2021 12:06 am	05/20/2021 12:15 am	05/20/2021 12:16 am	01/31/2021	05/19/2021	Yes	

**Figure 9: Production Management Report Complete Tab**

## Packages Inventory Report Update

Users will notice the update to the packages inventory report now has an additional “Source Package” field. To run the report, navigate to the Control Panel screen under the Reports area. Once there, run the Packages Inventory report. This report is shown below in **Figure 10**.



**Figure 10: Run Packages Inventory Report**

Once run, the source package field can be seen which will indicate the source of the package included in the report.

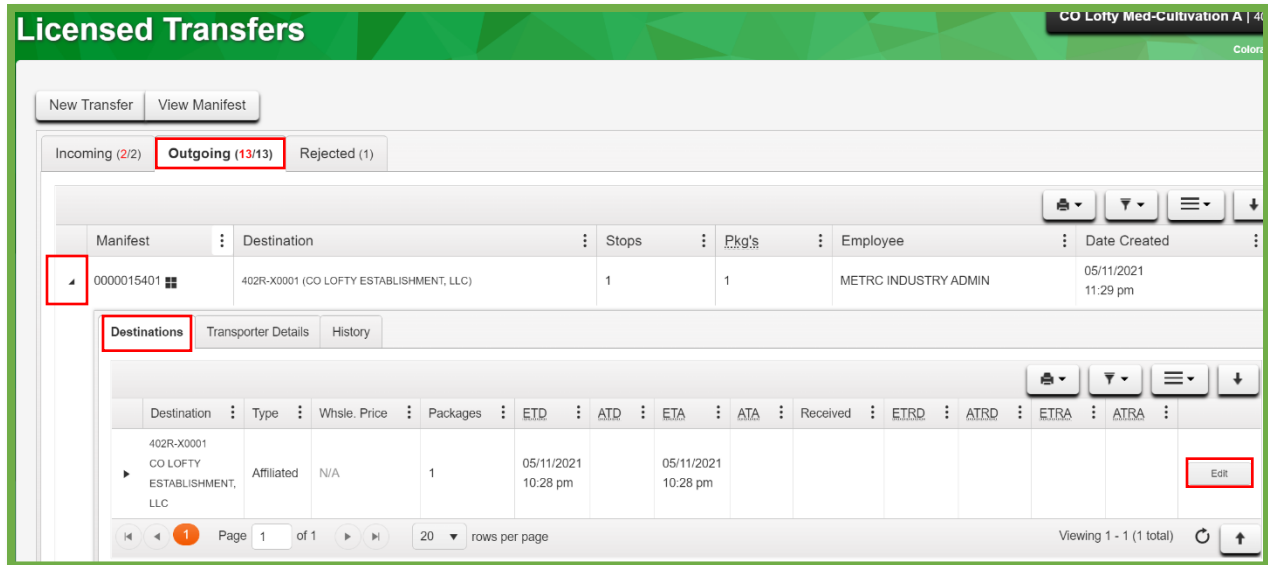
Package	Harvest	Source Packages
ABCDEF012345670000013908	GA 4.15.21	ABCDEF012345670000013904
ABCDEF012345670000013907	Blue Dream 6.22.20	ABCDEF012345670000013872

**Figure 11: Source Package Field**

## **Edit Transfer Manifests After Transporter Acceptance**

Users will now be able to edit the packages and destinations of transfers after they have been accepted by Transporter licenses for correction purposes.

To do this, navigate to the outgoing transfers screen and drill down on the transfer requiring edits. Once the drill down arrow is utilized, select the Destination tab and use the “Edit” button. This step is demonstrated in **Figure 12** below.



**Figure 12: Edit Outgoing Transfer**

The edit button will trigger an action window, to be able to edit the destination and package information for the transfer. Once the edits are complete, use the save transfer button to complete the process. This step is demonstrated below in **Figure 13**.



**Edit** ✕

---

Manifest

---

**Destination**

**Type**

Planned Route

**Est. Departure**    
↑ ↑  
 :    
↓ ↓

**Est. Arrival**    
↑ ↑  
 :    
↓ ↓

---

**Package # 1**

(package)

---

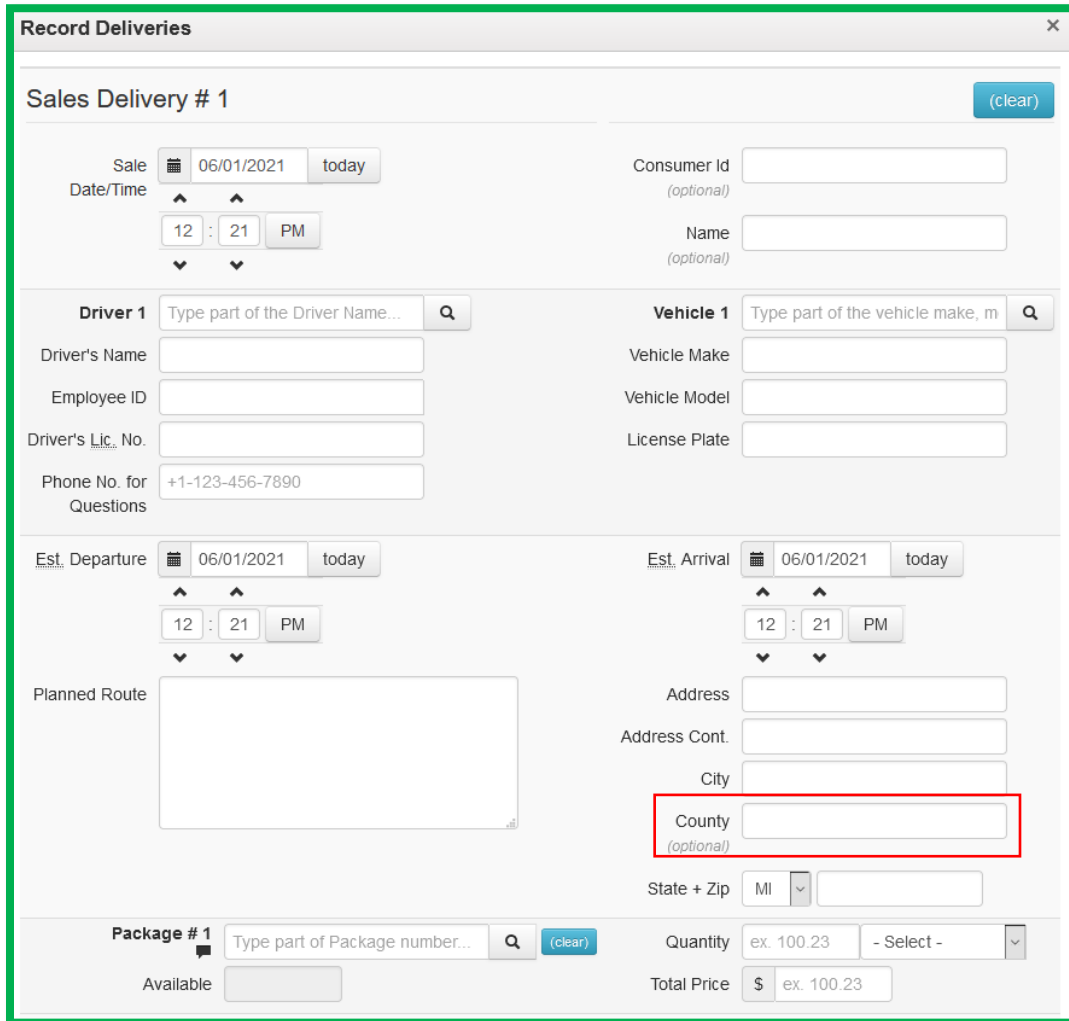
**For an Unaffiliated Transfer, the licensee should enter the agreed upon Contract Price of the marijuana. When entering the price, the actual price charged exclusive of tax must be recorded in the system.**

---

**Figure 13: Edit Transfer Action Window**

## Optional County Field in Sales Deliveries

Users with permissions to the Sales Deliveries in Metrc will see a new optional field to denote “County” for where the sales delivery is being delivered as seen in **Figure 14**.



The screenshot shows the 'Record Deliveries' interface. At the top, it says 'Sales Delivery # 1' with a '(clear)' button. Below this, there are two columns of input fields. The left column includes 'Sale Date/Time' (06/01/2021, today, 12:21 PM), 'Driver 1' (Name, Employee ID, Lic. No., Phone No. for Questions), 'Est. Departure' (06/01/2021, today, 12:21 PM), and 'Planned Route'. The right column includes 'Consumer Id (optional)', 'Name (optional)', 'Vehicle 1' (Make, Model, License Plate), 'Est. Arrival' (06/01/2021, today, 12:21 PM), 'Address', 'Address Cont.', 'City', 'County (optional)', 'State + Zip' (MI), 'Package # 1', 'Quantity' (ex. 100.23, - Select -), and 'Total Price' (\$ ex. 100.23). The 'County' field is highlighted with a red box.

**Figure 14: Record Sales Delivery**

## CSV Guidelines Update

The CSV Formatting Guide has been updated and can be found within the Support Dropdown. Updates to this guide include changes going into effect for the Sales Import requirements.

A new column referenced as "Identification Method" will now need to be included in both the Sales (new) and (update) files. An Identification Method is a free form field for users to indicate how they identified the individual making a purchase. At this time, unless the Identification Method is already required for sales receipts, it will not be enabled within this release and additional information would be provided in a future bulletin.

The order of the columns for the CSV Sales (new) import are as follows:

1. Sale Date/Time
2. Customer Type
3. Patient License Number
4. Caregiver License Number
5. Identification Method
6. Package Label
7. Quantity
8. Unit of Measure
9. Total Amount

The order of the columns for the CSV Sales (update) import are as follows:

1. Sales Receipt No.
2. Sales Date/Time
3. Sales Customer Type
4. Patient License Number
5. Caregiver License Number
6. Identification Method
7. Package Label
8. Quantity
9. Unit of Measure
10. Total Amount

*Please feel free to contact support at [support@metrc.com](mailto:support@metrc.com) or 877-566-6506 with any questions.*