

Bulletin Number: NV_IB_0049	Distribution Date: 7/1/21	Effective Date: 7/6/21
Contact Point: Metrc® Support	Subject: New Features in Metrc	
Reason: 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**.

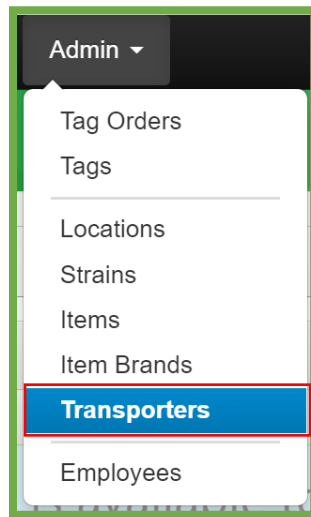


Figure 1: Admin Menu with Transporter Option

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**.

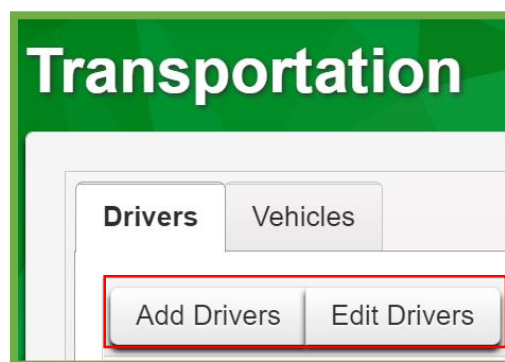
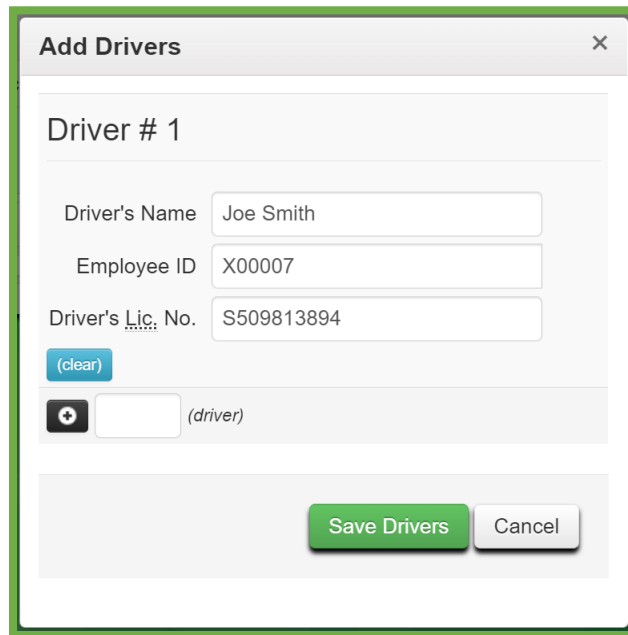


Figure 2: Add Driver Button

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

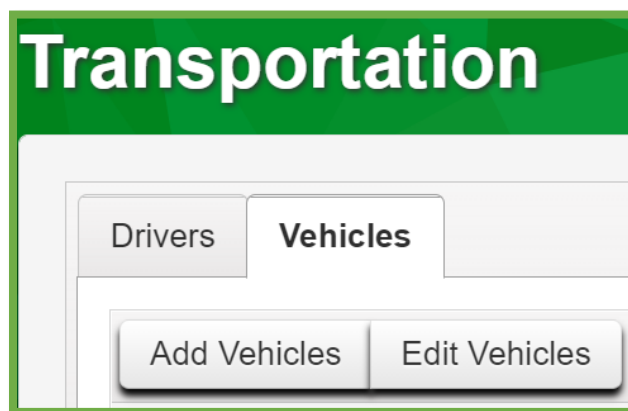


The image shows a software window titled "Add Drivers" with a close button (X) in the top right corner. Inside the window, there is a section labeled "Driver # 1". Below this label are three input fields: "Driver's Name" containing "Joe Smith", "Employee ID" containing "X00007", and "Driver's Lic. No." containing "S509813894". Below these fields is a blue button labeled "(clear)". Underneath the clear button is a small square icon with a plus sign and a text input field containing "(driver)". At the bottom right of the window are two buttons: a green "Save Drivers" button and a grey "Cancel" button.

Figure 3: Add Driver Action Window

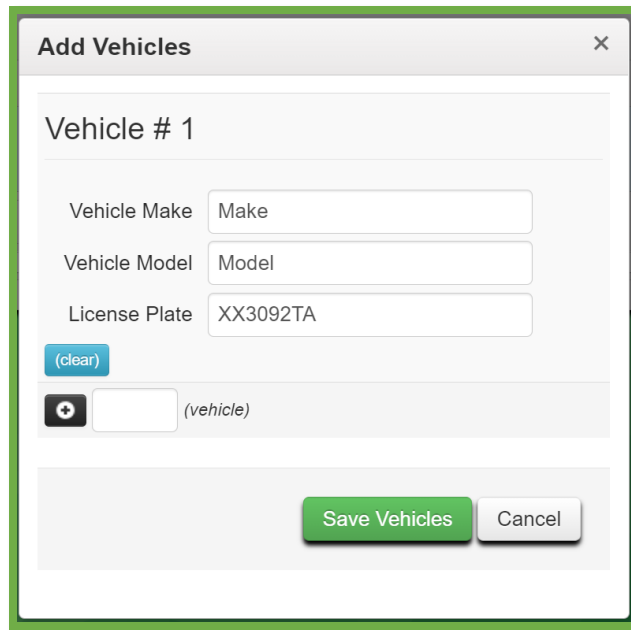
Once the information is entered, save the driver to be used when creating transport manifests.

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



The image shows a software interface with a green header bar containing the word "Transportation" in white. Below the header bar are two tabs: "Drivers" and "Vehicles". The "Vehicles" tab is currently selected. Below the tabs are two buttons: "Add Vehicles" and "Edit Vehicles".

Figure 4: Add and Edit Vehicle Buttons



The image shows a software window titled "Add Vehicles" with a close button (X) in the top right corner. Inside the window, there is a section labeled "Vehicle # 1". Below this label are three input fields: "Vehicle Make" with the placeholder text "Make", "Vehicle Model" with the placeholder text "Model", and "License Plate" with the placeholder text "XX3092TA". Below these fields is a blue button labeled "(clear)". At the bottom of the input section is a plus icon in a square followed by a text box containing "(vehicle)". At the bottom right of the window are two buttons: a green "Save Vehicles" button and a gray "Cancel" button.

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**.

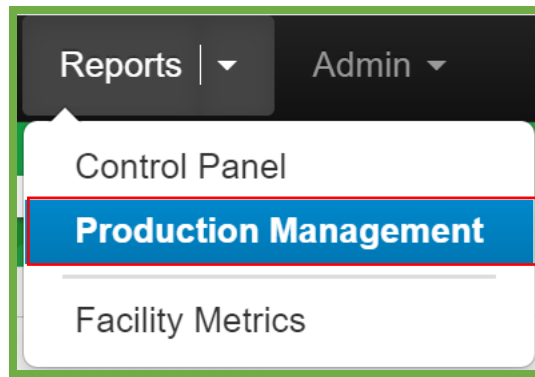


Figure 6: Navigate to the Production Management Report

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**.

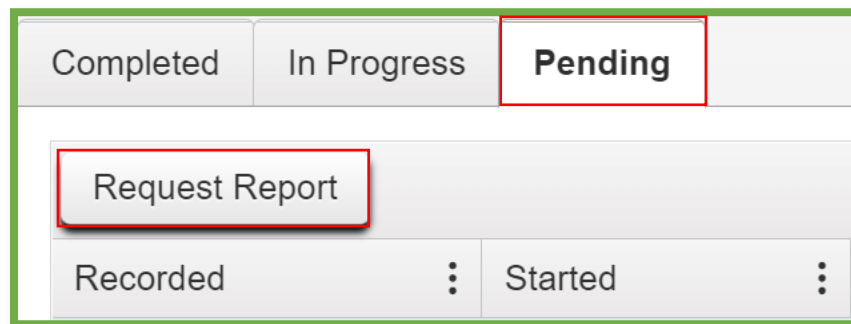
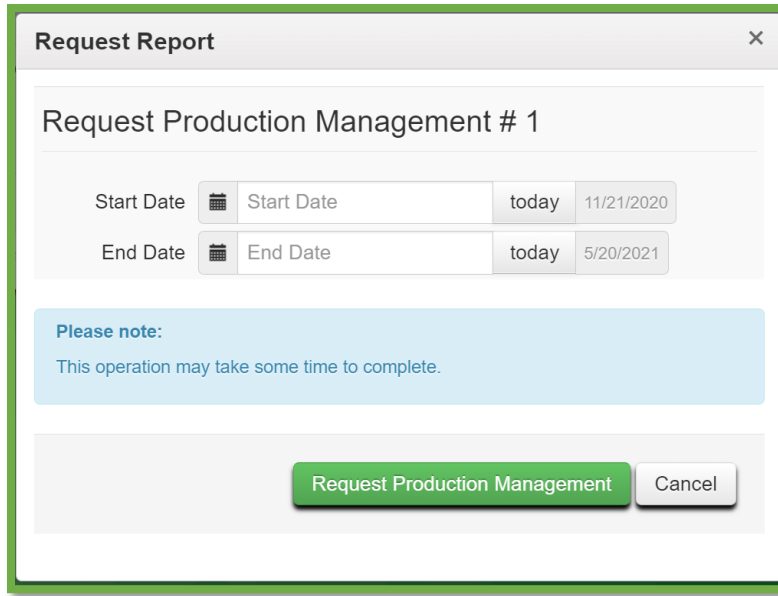


Figure 7: Pending Report Tab and Request Report Button

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.



Request Report [X]

Request Production Management # 1

Start Date [calendar icon] Start Date [today] 11/21/2020

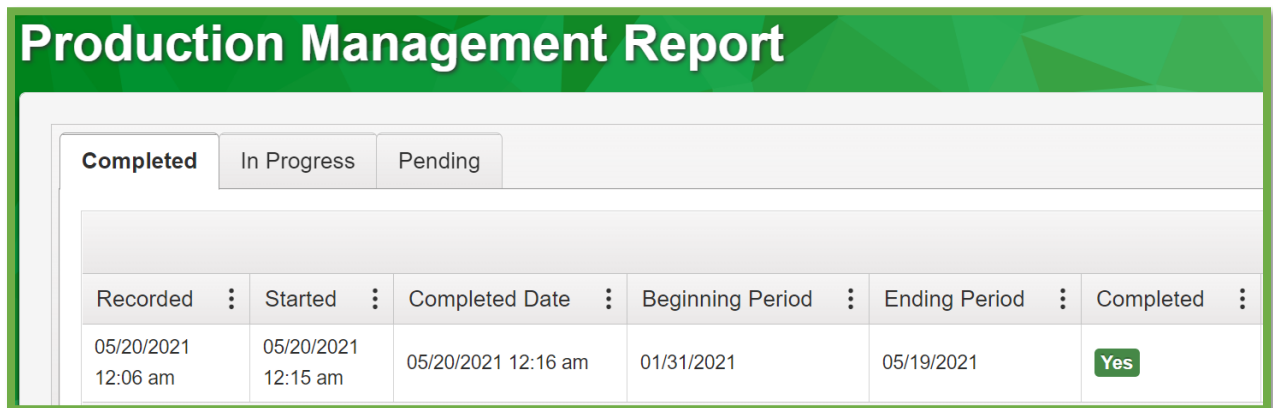
End Date [calendar icon] End Date [today] 5/20/2021

Please note:
This operation may take some time to complete.

[Request Production Management] [Cancel]

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.

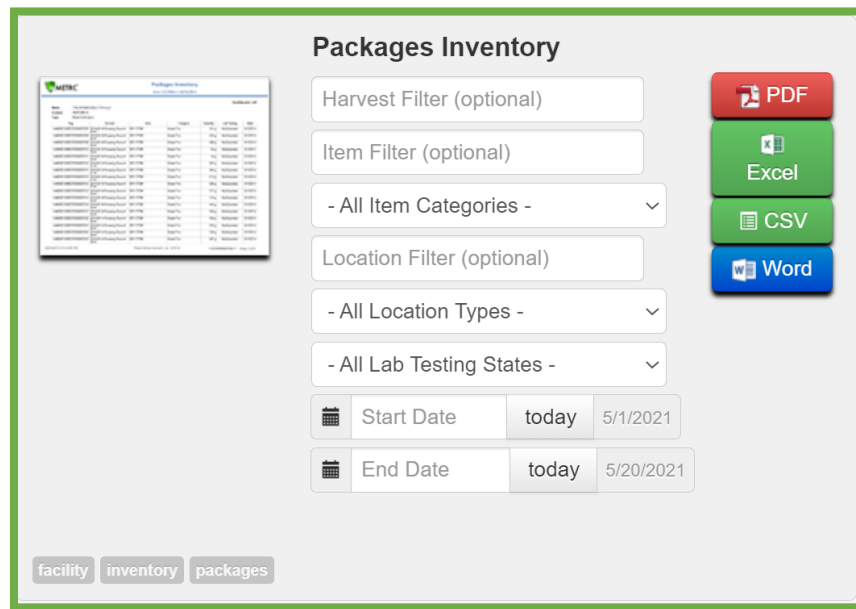


Production Management Report					
Completed In Progress Pending					
Recorded	Started	Completed Date	Beginning Period	Ending Period	Completed
05/20/2021 12:06 am	05/20/2021 12:15 am	05/20/2021 12:16 am	01/31/2021	05/19/2021	Yes

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**.



Packages Inventory

Harvest Filter (optional)

Item Filter (optional)

- All Item Categories -

Location Filter (optional)

- All Location Types -

- All Lab Testing States -

Start Date: today 5/1/2021

End Date: today 5/20/2021

PDF Excel CSV Word

facility inventory packages

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.

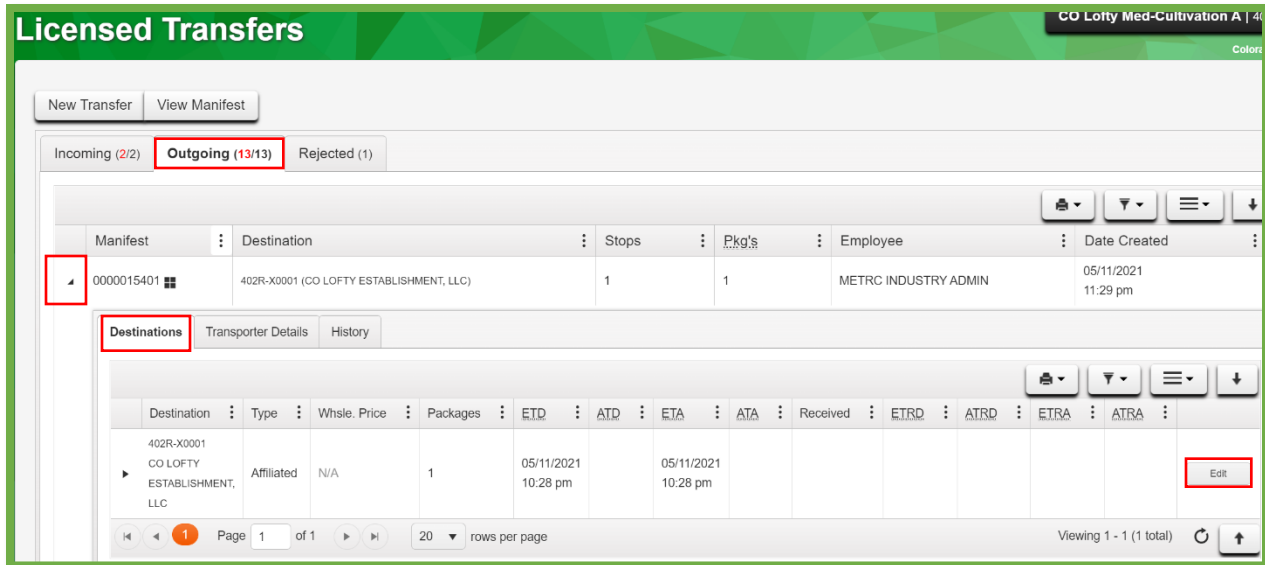
Package	Harvest	Source Packages
ABCDEF012345670000013908	GA 4.15.21	ABCDEF012345670000013904
ABCDEF012345670000013907	Blue Dream 6.22.20	ABCDEF012345670000013872

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.



The screenshot displays the 'Licensed Transfers' interface. At the top, there are tabs for 'Incoming (2/2)', 'Outgoing (13/13)' (highlighted with a red box), and 'Rejected (1)'. Below these, a table lists transfer manifests. The first manifest is selected, showing details like 'Manifest: 0000015401', 'Destination: 402R-X0001 (CO LOFTY ESTABLISHMENT, LLC)', 'Stops: 1', 'Pkg's: 1', 'Employee: METRC INDUSTRY ADMIN', and 'Date Created: 05/11/2021 11:29 pm'. A red box highlights a drill-down arrow next to the manifest ID. Below the manifest details, there are tabs for 'Destinations', 'Transporter Details', and 'History'. The 'Destinations' tab is active, showing a table with columns: Destination, Type, Whse. Price, Packages, ETD, ATD, ETA, ATA, Received, ETRD, ATRD, ETRA, and ATRA. The first row shows '402R-X0001 CO LOFTY ESTABLISHMENT, LLC' as the destination, 'Affiliated' as the type, 'N/A' as the price, '1' as the package count, and dates '05/11/2021 10:28 pm' for both ETD and ETA. A red box highlights an 'Edit' button at the end of this row. At the bottom, there is a pagination bar showing 'Page 1 of 1' and '20 rows per page'.

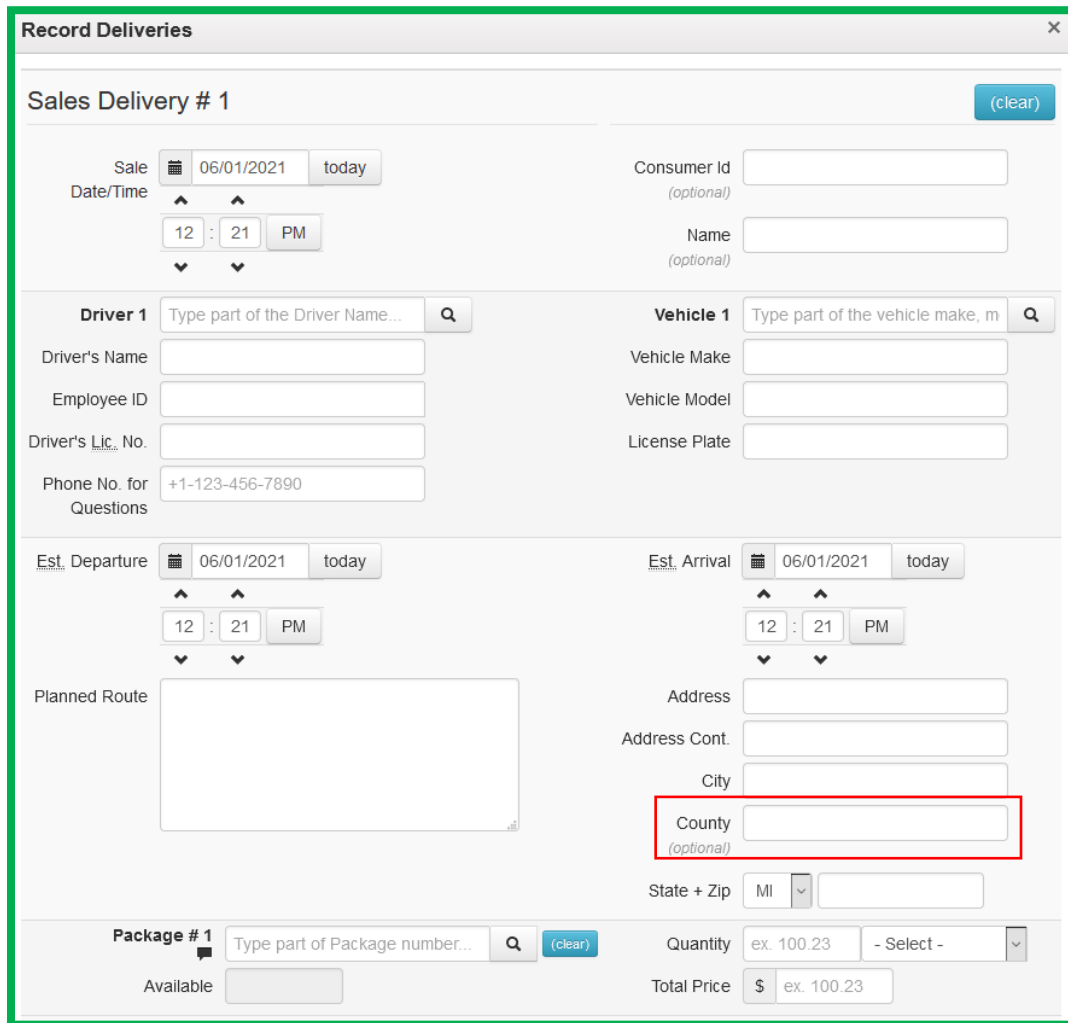
Figure 12: Edit Outgoing Transfer

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**.

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**.



Record Deliveries

Sales Delivery # 1 (clear)

Sale Date/Time: 06/01/2021 today
 12 : 21 PM

Consumer Id (optional)
 Name (optional)

Driver 1 Type part of the Driver Name... Q
 Driver's Name
 Employee ID
 Driver's Lic. No.
 Phone No. for Questions +1-123-456-7890

Vehicle 1 Type part of the vehicle make, m Q
 Vehicle Make
 Vehicle Model
 License Plate

Est. Departure: 06/01/2021 today
 12 : 21 PM
 Planned Route

Est. Arrival: 06/01/2021 today
 12 : 21 PM
 Address
 Address Cont.
 City
 County (optional)
 State + Zip MI

Package # 1 Type part of Package number... Q (clear)
 Available

Quantity ex. 100.23 - Select -
 Total Price \$ ex. 100.23

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 or 877-566-6506 with any questions.