

Metrc Support Bulletin



Bulletin Number: AK_IB_0044	Distribution Date: 8/13/2022	Effective Date: see bulletin
Contact Point: Metrc® Support	Subject: Action Reason notes, Common Transporters,	
Reason: To inform Licensees of required Notes and provide guidance on using the Transporters tab, Driver templates, and Vehicle templates		

Greetings Metrc® Users,

Metrc and AMCO are pleased to provide additional information and guidance on Action Reasons and Common Transporters.

On June 23, 2022, AMCO began requiring Notes for all Action Reasons. This bulletin provides additional information on the requirements.

Following up on a request from the Industry User Group sessions, we are also providing step-by-step guidance on Transporters, adding Drivers, adding Vehicles, and using templates.

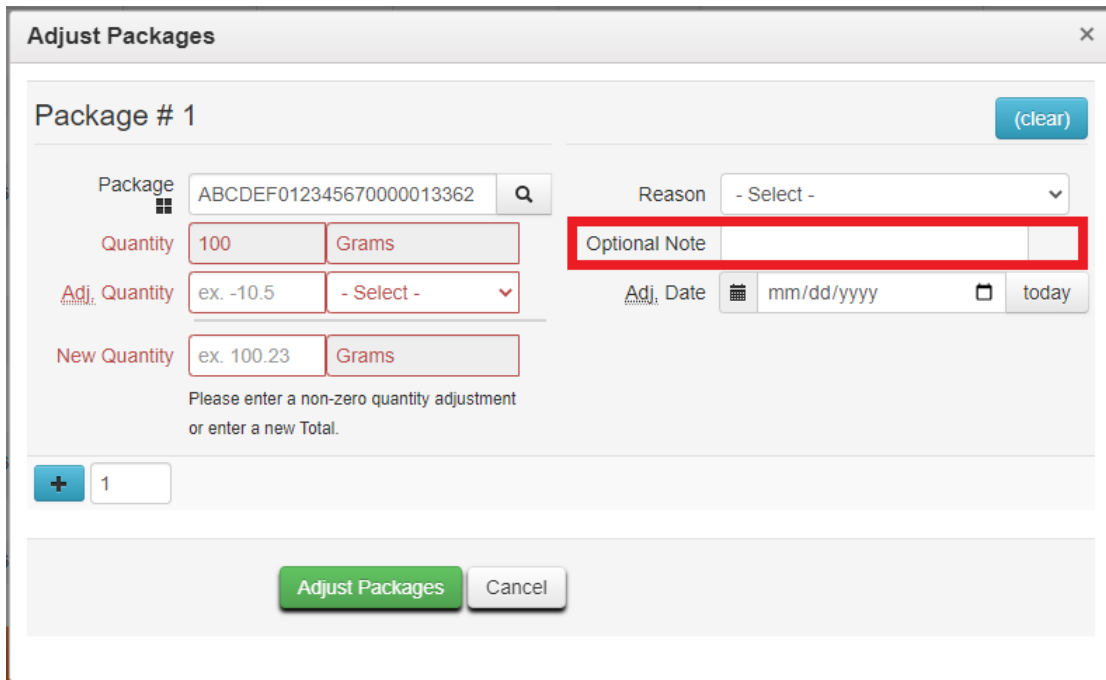
Notes required for Action Reasons

Action Reasons that require Notes are listed below in Figure 1.

Action Reason	Note Required
API Adjustment Error	YES
API Conversion Error	YES
API Duplicate sales entry	YES
Cultivation Sample Testing	YES
Damage	YES
Disease/Infestation	YES
Drying	YES
During Transfer	YES
Entry Error	YES
In-House Quality Control	YES
Over/Under Pulled	YES
Over/Under Sold	YES
Package Material	YES
Plant Death	YES
Plants Unpacked	YES
Post-Harvest	YES
Product Recall	YES
Scale Variance	YES
Seed Planting	YES
Spoilage	YES
Spoilage/expiration	YES
State-ordered destruction	YES
Testing	YES
Theft	YES
Transfer Error	YES
Trimming	YES
Waste	YES
Wrong Sex	YES

Figure 1: Action Reasons requiring Notes

For example, when adjusting a Package, the Note will not say “required” (see Figure 2) until you select an Action Reason from the drop-down menu.

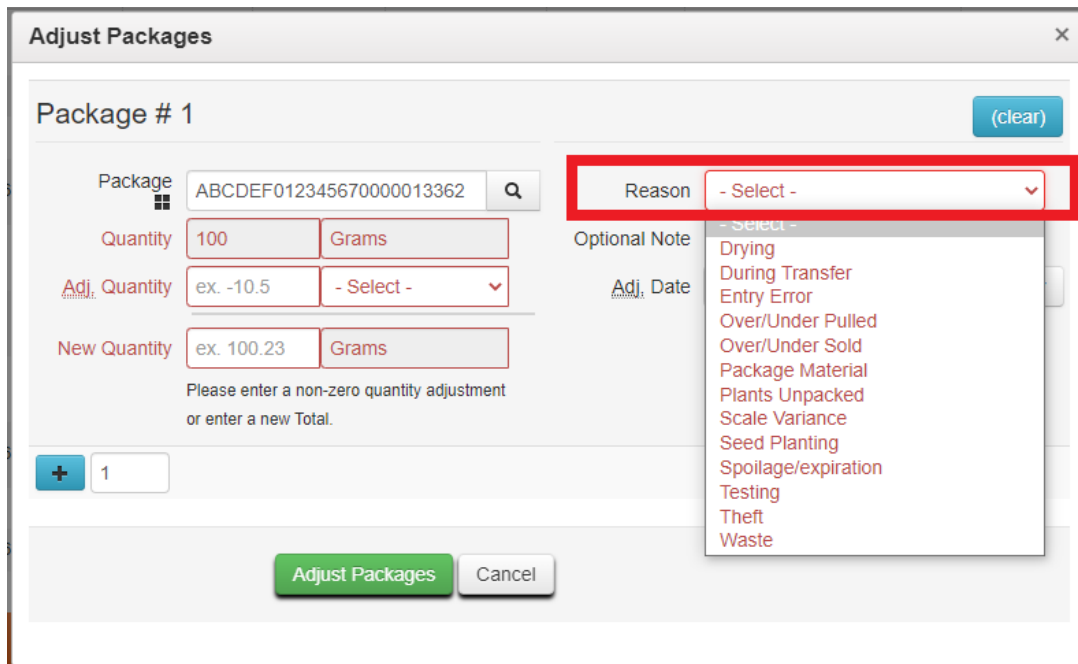


The screenshot shows the 'Adjust Packages' dialog box. It contains the following fields and controls:

- Package # 1** (with a '(clear)' button)
- Package**: Input field with value 'ABCDEF012345670000013362' and a search icon.
- Quantity**: Input field with value '100' and a unit dropdown set to 'Grams'.
- Adj. Quantity**: Input field with value 'ex. -10.5' and a unit dropdown set to '- Select -'.
- New Quantity**: Input field with value 'ex. 100.23' and a unit dropdown set to 'Grams'.
- Reason**: A dropdown menu currently showing '- Select -'.
- Optional Note**: An empty text input field, highlighted with a red border.
- Adj. Date**: A date picker set to 'mm/dd/yyyy' with a 'today' button.
- A note: 'Please enter a non-zero quantity adjustment or enter a new Total.'
- A counter: '+ 1'.
- Buttons: 'Adjust Packages' (green) and 'Cancel' (grey).

Figure 2: Adjusting a Package

Please note that the Reason drop-down menu will vary based on the type of license you are signed into and the item you are adjusting.

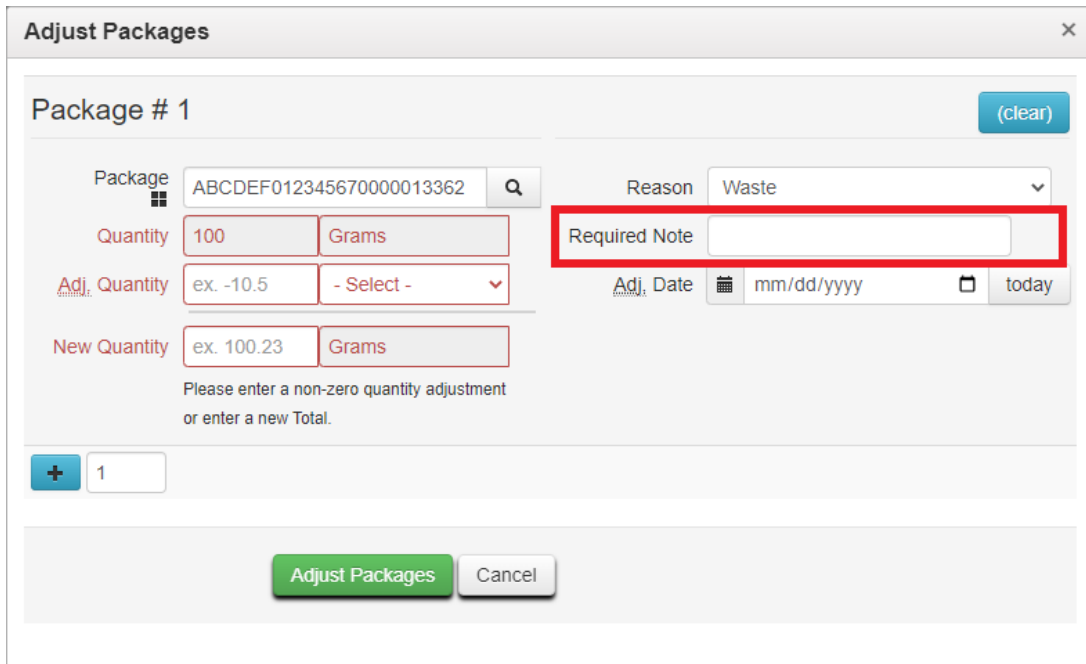


This screenshot shows the 'Adjust Packages' dialog box with the 'Reason' dropdown menu open. The menu lists the following options:

- Select -
- Select -
- Drying
- During Transfer
- Entry Error
- Over/Under Pulled
- Over/Under Sold
- Package Material
- Plants Unpacked
- Scale Variance
- Seed Planting
- Spoilage/expiration
- Testing
- Theft
- Waste

Figure 3: Selecting a Reason from the drop-down menu

Once a Reason is selected from the drop-down menu (see Figure 3), the Note becomes Required (see Figure 4).



The screenshot shows a web form titled "Adjust Packages" with a close button (X) in the top right corner. The form is for "Package # 1" and includes a "(clear)" button. The "Package" field contains the alphanumeric string "ABCDEF012345670000013362" with a search icon. The "Reason" dropdown menu is set to "Waste". The "Required Note" field is a text input box, highlighted with a red border. Below it, the "Adj. Date" field is a date picker set to "mm/dd/yyyy" with a "today" button. The "Quantity" field is "100" with a unit of "Grams". The "Adj. Quantity" field is "ex. -10.5" with a unit of "- Select -". The "New Quantity" field is "ex. 100.23" with a unit of "Grams". A note below the quantity fields reads: "Please enter a non-zero quantity adjustment or enter a new Total." At the bottom, there is a counter with a "+" button and the number "1". Two buttons, "Adjust Packages" (green) and "Cancel", are at the bottom center.

Figure 4: Required Note on Package Adjustment

Required Notes may be as generic or detailed as you would like. Metrc recommends adding clear and concise notes, as the notes will be visible to AMCO and Enforcement.

Common Transporters – Transportation page

Some licensees may have multiple Transporters and/or Vehicles. Using Metric's Transporter page, licensees may add templates for their frequently used drivers and/or vehicles. To add templates, begin by selecting Transporters from the Admin drop-down menu (see Figure 5)

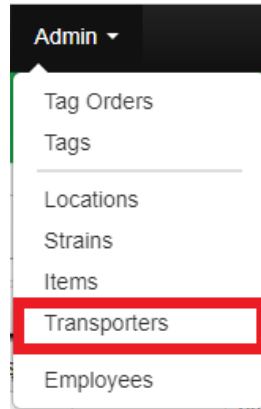


Figure 5: Admin > Transporters

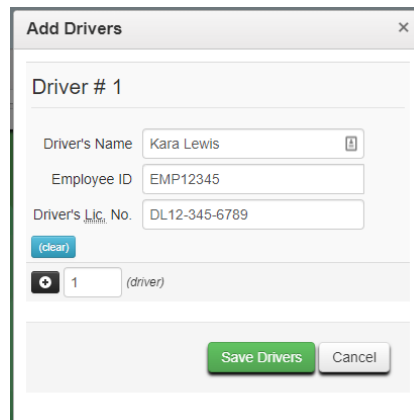
Common Transporters – adding Drivers

From the Transportation page, select the Drivers tab (see Figure 6).



Figure 6: Transportation > Drivers

Select Add Drivers and enter the required information (see Figure 7).

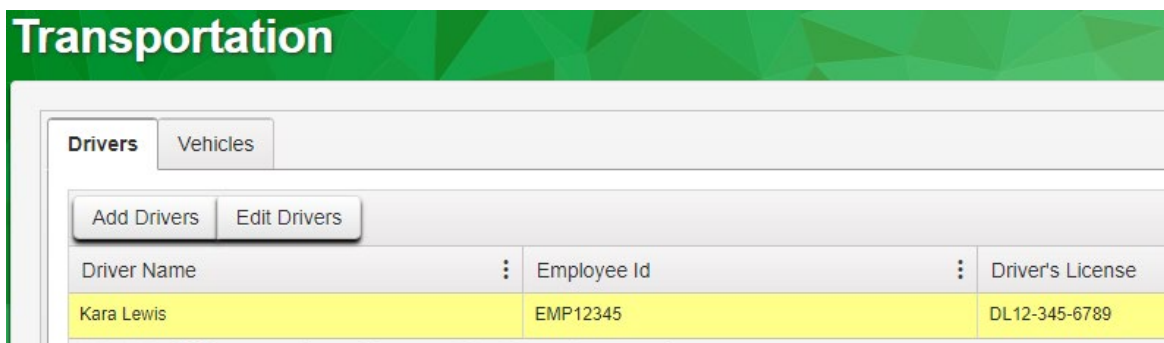


The 'Add Drivers' dialog box is shown with a close button (X) in the top right corner. It contains the following fields and controls:

- Driver # 1
- Driver's Name: Kara Lewis
- Employee ID: EMP12345
- Driver's Lic. No.: DL12-345-6789
- A blue 'clear' button.
- A dropdown menu with '1' selected and '(driver)' as a label.
- At the bottom, there are 'Save Drivers' and 'Cancel' buttons.

Figure 7: Transportation > Drivers > Add Drivers

Once the information has been entered, select "Save Drivers." You will see the new line with the driver information on your screen (see Figure 8).



The screenshot shows the 'Transportation' header in green. Below it, there are two tabs: 'Drivers' and 'Vehicles'. Under the 'Drivers' tab, there are two buttons: 'Add Drivers' and 'Edit Drivers'. Below the buttons is a table with three columns: 'Driver Name', 'Employee Id', and 'Driver's License'. The first row of the table is highlighted in yellow and contains the following data:

Driver Name	Employee Id	Driver's License
Kara Lewis	EMP12345	DL12-345-6789

Figure 8: New Driver

Common Transporters – adding Vehicles

From the Transportation page, select the Vehicles tab (see Figure 9).

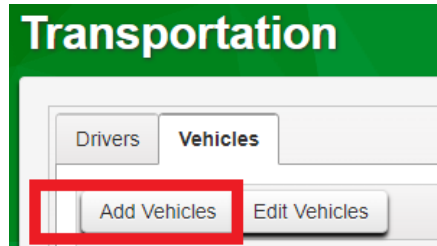
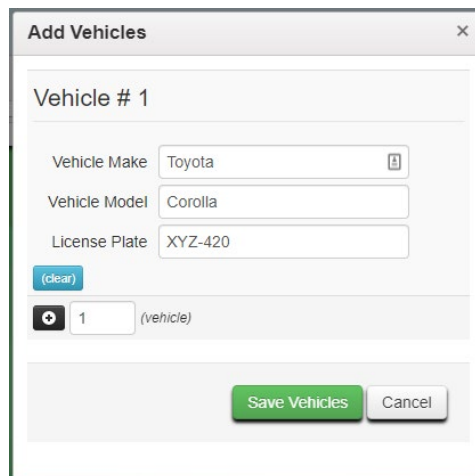


Figure 9: Transportation > Vehicles

Select Add Vehicles and enter the required information (see Figure 10).

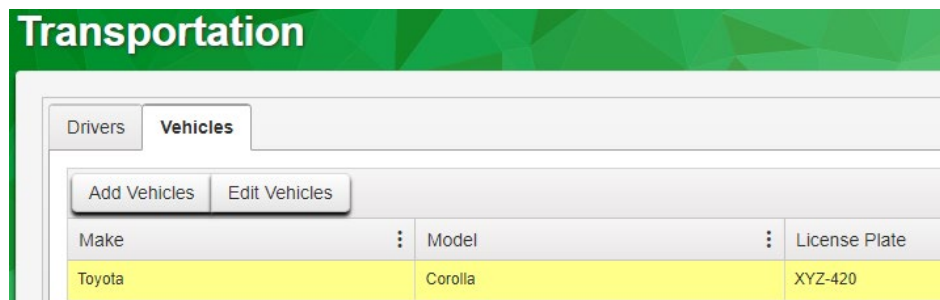


The 'Add Vehicles' dialog box is shown with a close button (X) in the top right corner. It contains the following fields and controls:

- Vehicle # 1
- Vehicle Make: Toyota
- Vehicle Model: Corolla
- License Plate: XYZ-420
- (clear) button
- + 1 (vehicle) control
- Save Vehicles button
- Cancel button

Figure 10: Transportation > Vehicles > Add Vehicles

Once the information has been entered, select “Save Vehicles.” You will see the new line with the vehicle information on your screen (see Figure 11).



The screenshot shows the 'Transportation' header in green. Below it are two tabs: 'Drivers' and 'Vehicles', with 'Vehicles' being the active tab. Underneath the tabs are two buttons: 'Add Vehicles' and 'Edit Vehicles'. Below the buttons is a table with the following data:

Make	Model	License Plate
Toyota	Corolla	XYZ-420

Figure 11: New Vehicle

Common Transporters – using Driver and Vehicle templates

Once common Drivers and Vehicles have been added to your Transportation page, you can begin using them with Transfers. On the Transfers page, select “New Transfer” and select the Transfer Type. On this form you will see a section for Driver and a section for Vehicle (see Figure 12).

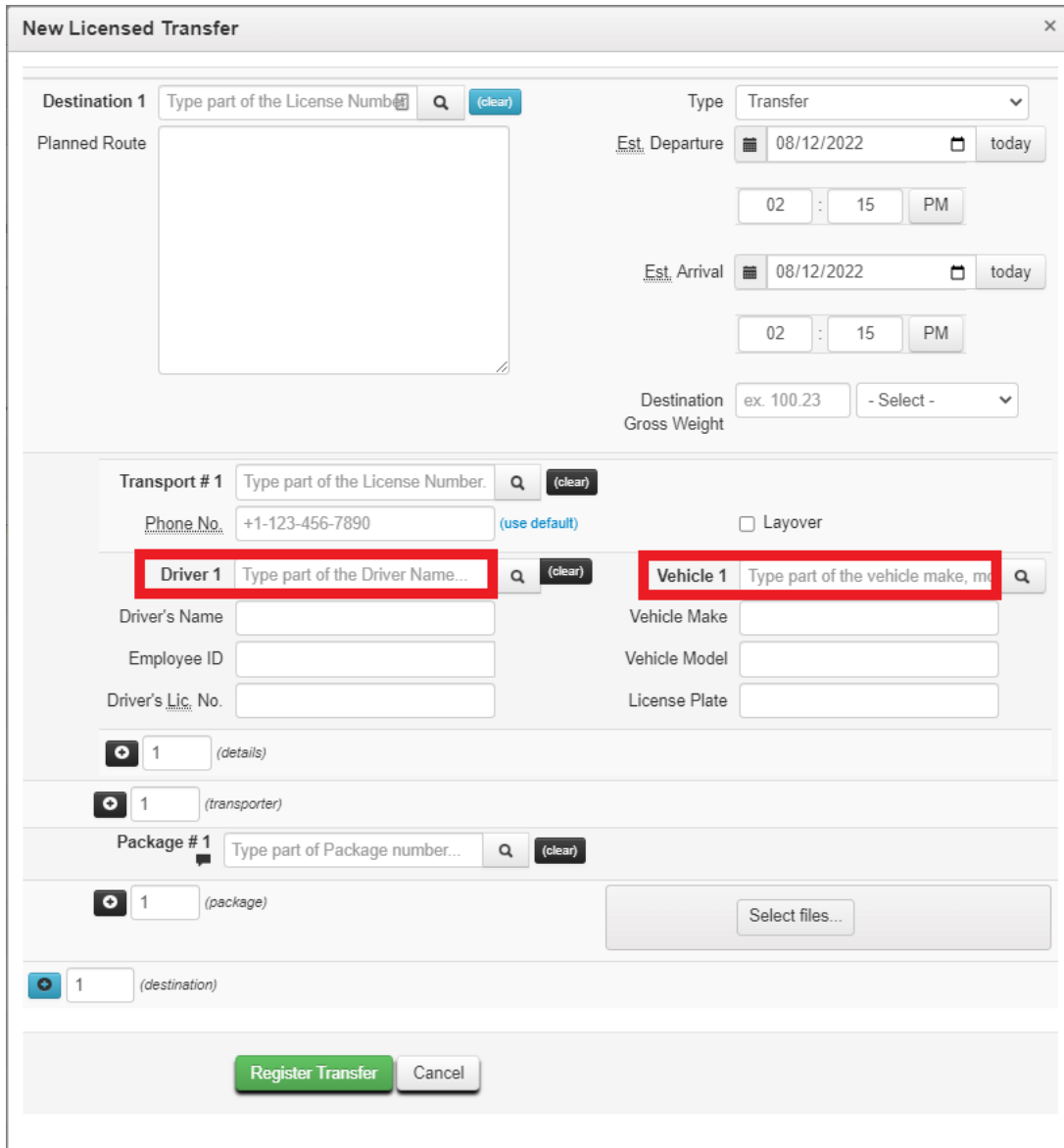


Figure 12: New Transfer

To add a Driver or Vehicle, you can either select the magnifying glass next to “Driver 1” or “Vehicle 1”. Or you can start typing in the first few letters of the driver or vehicle (see Figure 13)



Driver 1: Kara Lewis [magnifying glass icon] [clear]

Vehicle 1: [dropdown menu] [magnifying glass icon]

Driver's Name: Kara Lewis

Vehicle Make: Toyota Corolla XYZ-420

Employee ID: EMP12345

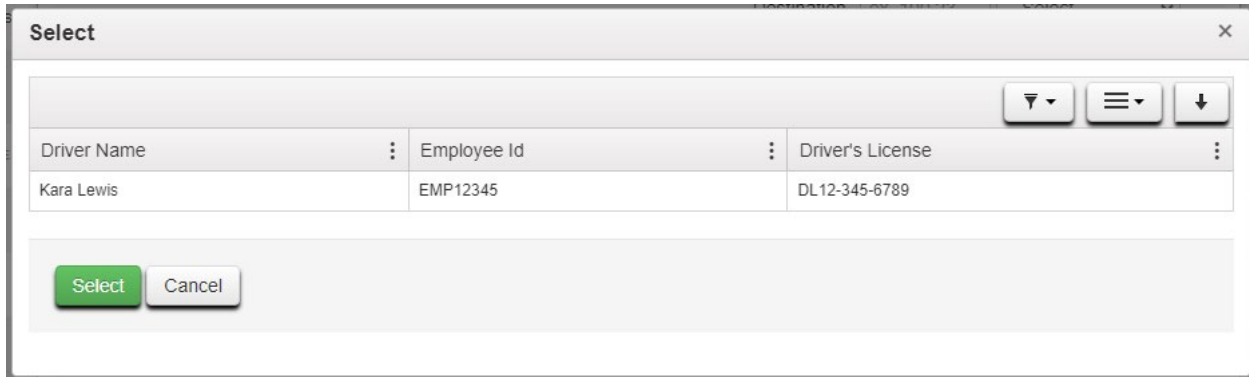
Vehicle Model: [empty field]

Driver's Lic. No.: DL12-345-6789

License Plate: [empty field]

Figure 13: Transfer, selecting a driver and vehicle

By selecting the magnifying glass, a pop-up screen will show the options of saved Drivers (see Figure 14).



Select

Driver Name	Employee Id	Driver's License
Kara Lewis	EMP12345	DL12-345-6789

Select Cancel

Figure 14: Transfer, selecting a driver

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