Metrc Best Practices Bulletin

Bulletin Number: CO_IB_11.11.22	Distribution Date: 11/11/2022	Effective Date: Ongoing
Contact Point: Metrc® Support	Subject: Finishing Harvests and Packages, Finalizing Sales, Metrc Learn	
Reason: Metrc is providing emphasized guidance on the requirement to finish harvests and packages		

Greetings Metrc Users,

Metrc would like to provide guidance on how to best optimize the performance of the Metrc system for each of your licenses. Metrc consistently monitors system performance, as well as proactively identifies and addresses potential performance issues. However, there are specific steps each licensee can take to ensure Metrc is performing at optimal levels throughout the day. These steps include finishing harvests once they are completed, finishing packages once they become zero-quantity, and finalizing sales. These steps will help to speed up your processing time in the system, mitigate data errors that could be mistaken for non-compliance, and overall enhance the integrity of the Metrc system. All of these processes will be demonstrated within this bulletin. Also, included in this bulletin is the information for registering for a Metrc Learn account for all future and more in-depth training, which is a requirement for all Owners and Metrc Administrators, and is strongly suggested for all badged employees.

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

Finishing Harvests

Cultivation facility licensees must complete the harvest batch process following the steps outlined in the Metrc training and guide. Once all the unusable plant material is wasted out and all usable plant material is packaged (which moves it to the active packages inventory), the harvest must be finished.

Finishing a harvest not only removes it from the active harvest screen but will also indicate that any remaining weight left in the harvest is attributed to moisture loss.

To finish a harvest, navigate to the Harvested tab of the Plants Area and select a harvest(s) that has/have no more physical plant material remaining that has not been attributed to waste or a package in Metrc. Once selected, use the "Finish" button. This step is demonstrated in **Figure 1**, below.
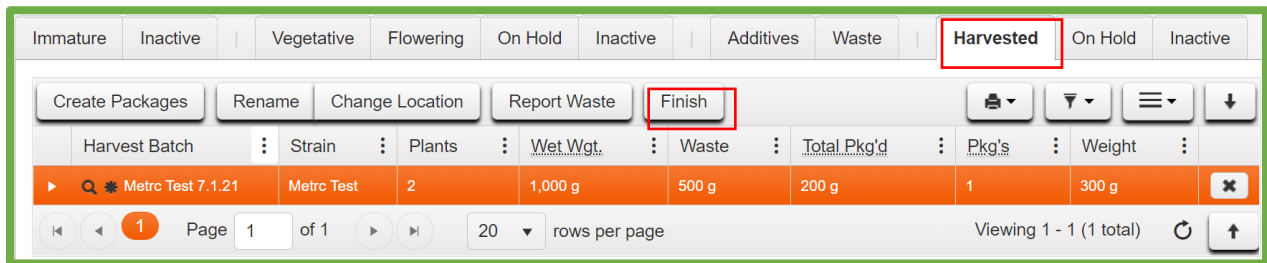

Figure 1: Select Harvest Batch to Finish

This button will open an action window to indicate the Date Finished and then select the "Finish Harvests" button to complete the process. This step is demonstrated below in **Figure 2**.
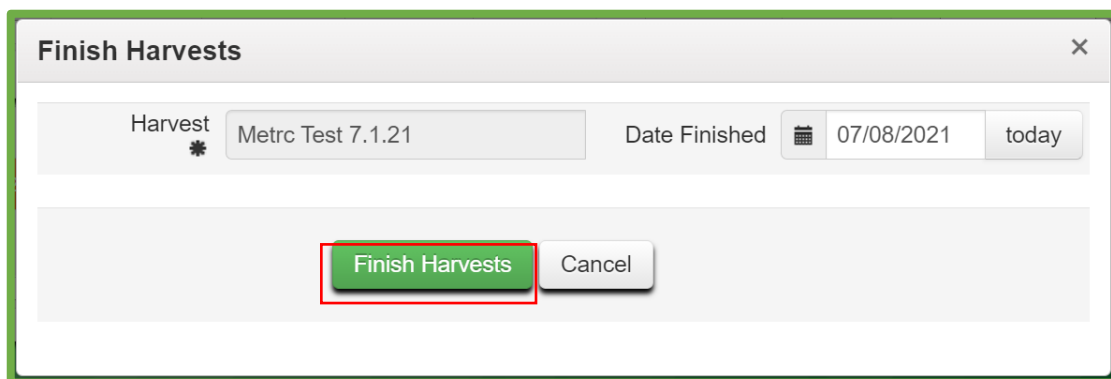

Figure 2: Finish Harvest Batch Action Window

Once this step is completed, the harvest batch will be moved to the Inactive Harvests tab. Also, it can be noted that the remaining weight left in the harvest, after all physical plant material has been wasted or packaged, is now attributed to Moisture Loss. This example is shown below in **Figure 3**.

Figure 3: Finished Harvest Batch Example

Finishing Zero-Quantity Packages

Any licensee with packages must ensure that all packages with zero-quantity are being finished. This moves these packages to the Inactive Package grid so that only packages with remaining quantities are visible in the active packages grid. This helps with overall performance in the system.

To identify packages that are zero-quantity or lower, navigate to the Packages grid by going to the Packages area on the long black navigational bar. Once there, click on the "Quantity" table header so all zero-quantity packages are listed first. By clicking once, the table will sort all packages in ascending order, by quantity, moving the smallest, or zero-quantity, packages to the top. Zero-quantity packages are also identified by the gray font.

Next, select one or several packages at a time to finish and use the "Finish" button to start the process. This step is demonstrated in **Figure 4**, below.
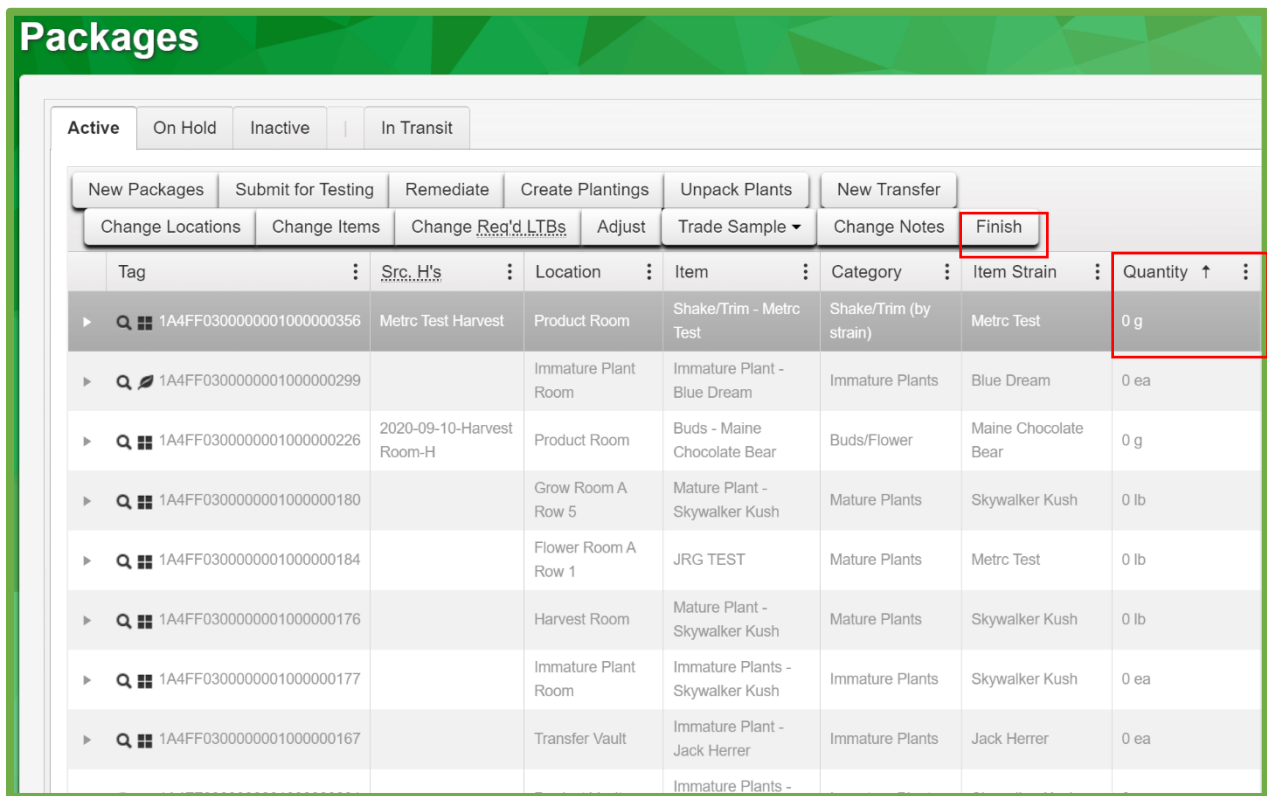

Figure 4: Select Zero-Quantity Package to Finish

This button will open an action window to indicate the Date Finished. Then use the "Finish Packages" button to complete the process, moving the package to the Inactive Packages tab. This step is demonstrated below in **Figure 5**.
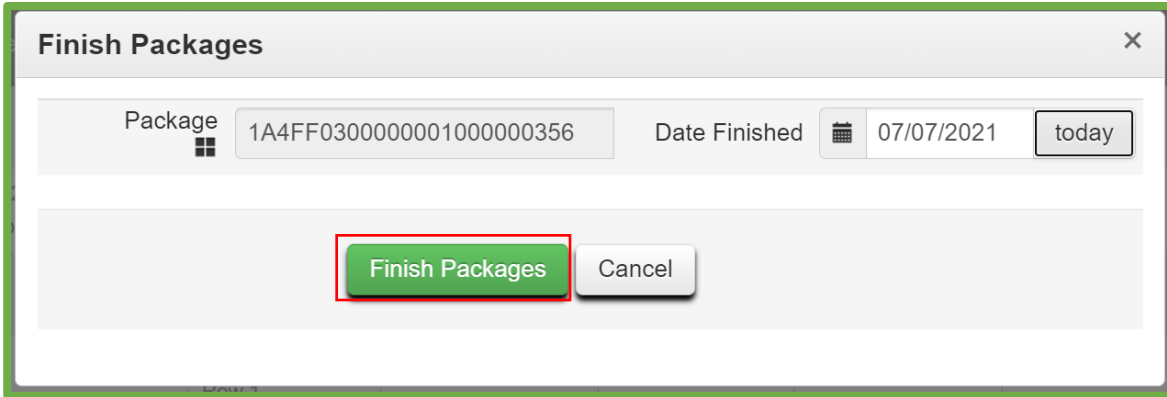
Figure 5: Finish Package Action Window

Sales Receipt Finalize and Unfinalize Buttons

The Sales Receipt section of Metrc was previously updated to include two new buttons: Finalize and Unfinalize. A new Finalized column (filterable) has been added to the Sales Receipt grid as well.
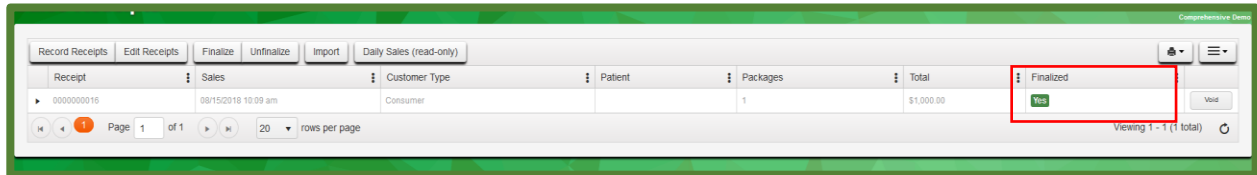

Figure 6: New Finalized Sales Receipt Field

When a sales receipt is no longer active, select the receipt and click the Finalize button. The following window will appear. 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 to enhance the integrity of the data within the Metrc system and adhere to recording keeping rules). Finalizing sales prevents having system performance issues.*
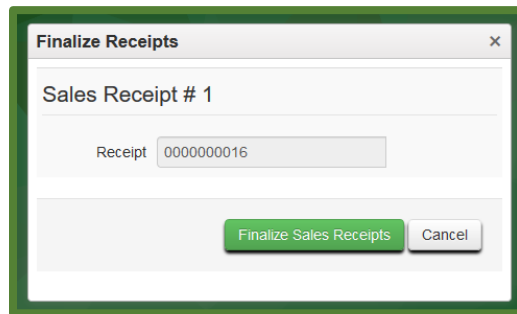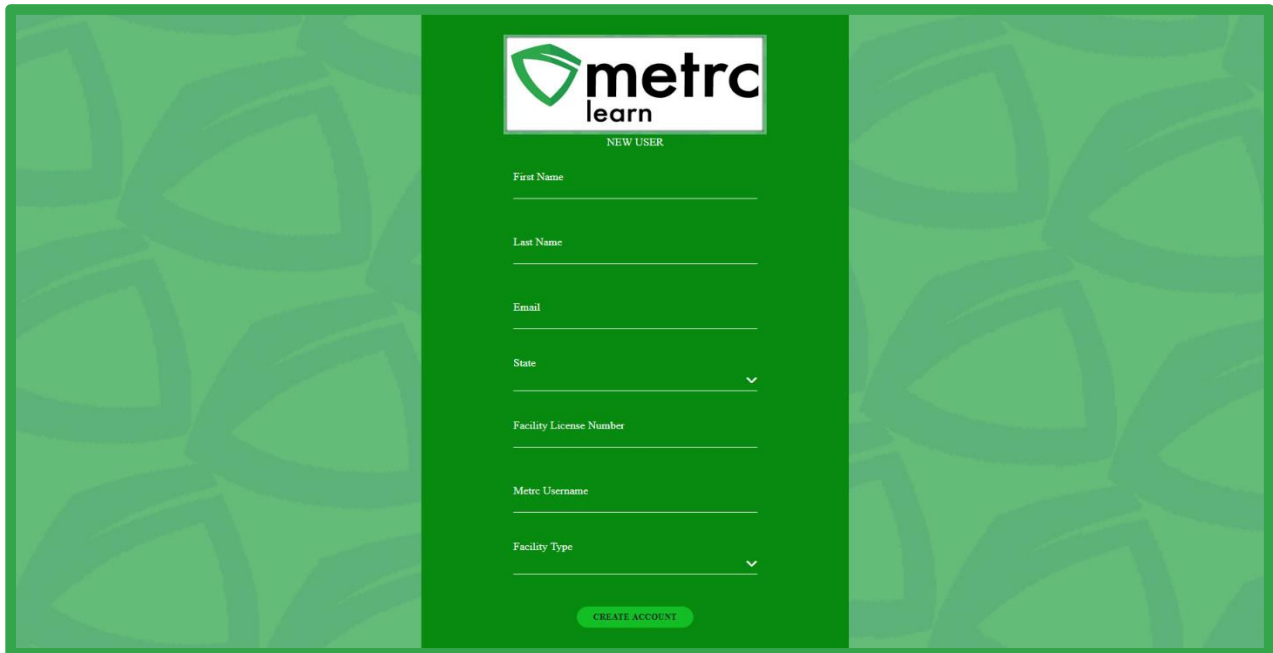

Figure 7: Finalize Sales Receipt Action Window

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.*

Register for Metrc Learn

Metrc Learn is designed to provide users with skills on the functionality available within Metrc. Users will learn how to use the system effectively, and then demonstrate their learning through interactive assessments. The functionality and topics are similar to the New Business and Advanced Metrc Trainings. Metrc Learn is organized into role-specific journeys that are made up of various modules; each module is focused on one function in Metrc. For example, the Cultivation journey might include different courses, such as "Creating an Immature Plant Batch," "Tracking Additives," "Reporting Waste," etc.

To access Metrc Learn, the user must register their account (link to Metrc Learning Registration). You can enter the required information. Once your registration information has been verified, you will be sent an email invitation to set your password by Metrc. If a user is working in multiple licenses, you should register for the program that reflects the area of the role you are looking to have training on first. This registration page is shown below in **Figure 8**.

Figure 8: Metrc Learn Registration Page

Please Note: *Users are encouraged to use an email they will have access to regardless of business association for their registration to ensure that any training transcripts are still accessible if email access is no longer available.*

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