

Metrc Support Bulletin



Bulletin Number: DC_IB_0020	Distribution Date: 7/8/19	Effective Date: 7/20/19
Contact Point: Metrc® Support	Subject: New Features in Metrc	
Reason: Metrc is providing an update on our newest feature releases for the software.		

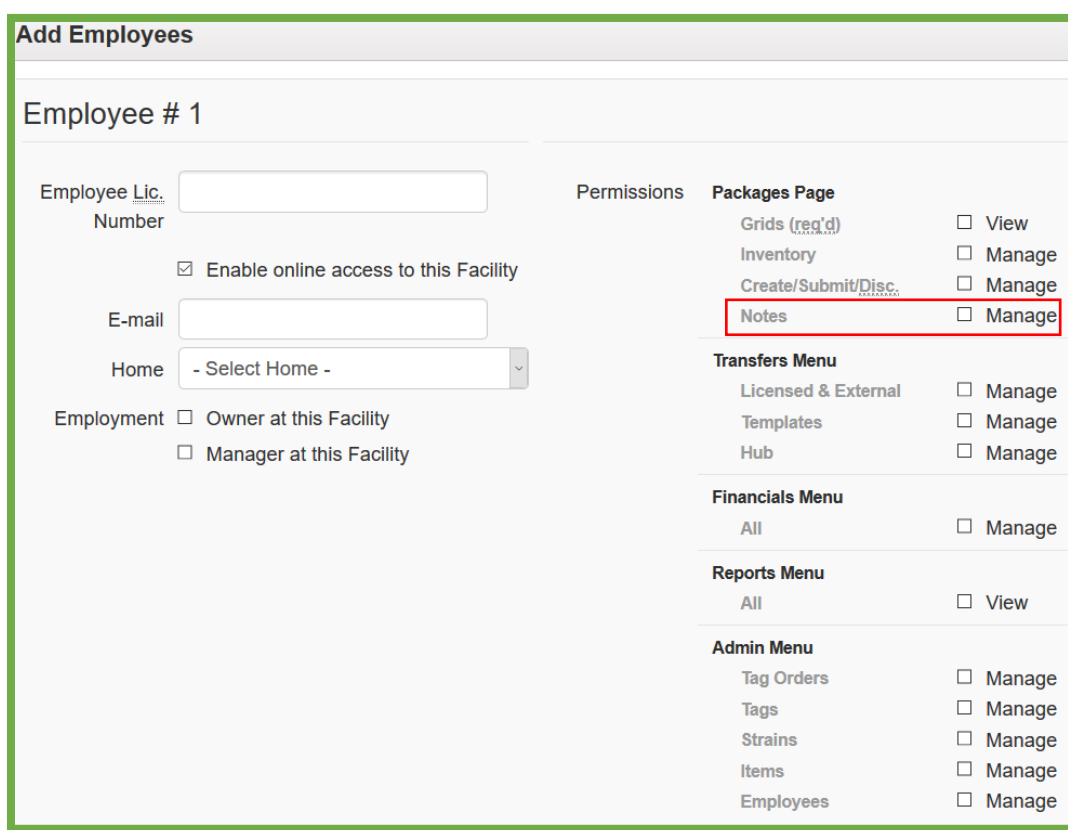
Greetings Metrc Users,

Metrc is pleased to provide information on our newest enhancements within the software. Users will have a new package permission to manage “Package Notes” within the packages grid. Metrc is also adding more columns and information within the Sales Receipt, Packages, and Transfers grids for all license types that have the respective grids.

Please find on the following pages a detailed description of the guidance and new functionality:

New Feature: Package Notes

Licensees will see a new permission available under the packages page for their employees. As seen in **Figure 1**, if a user is permitted to manage the “Notes” section, the user will then have the ability to create a note within any package in their facility. The note section is a free form field that is not a requirement when creating a new package as shown in the New Packages form in **Figure 2**. A package note can be viewed within the history tab pictured in **Figure 3**. The notes feature can be used at the user’s discretion to provide further detail about a specific package within a licensee’s inventory.



Add Employees

Employee # 1

Employee Lic. Number

☒ Enable online access to this Facility

E-mail

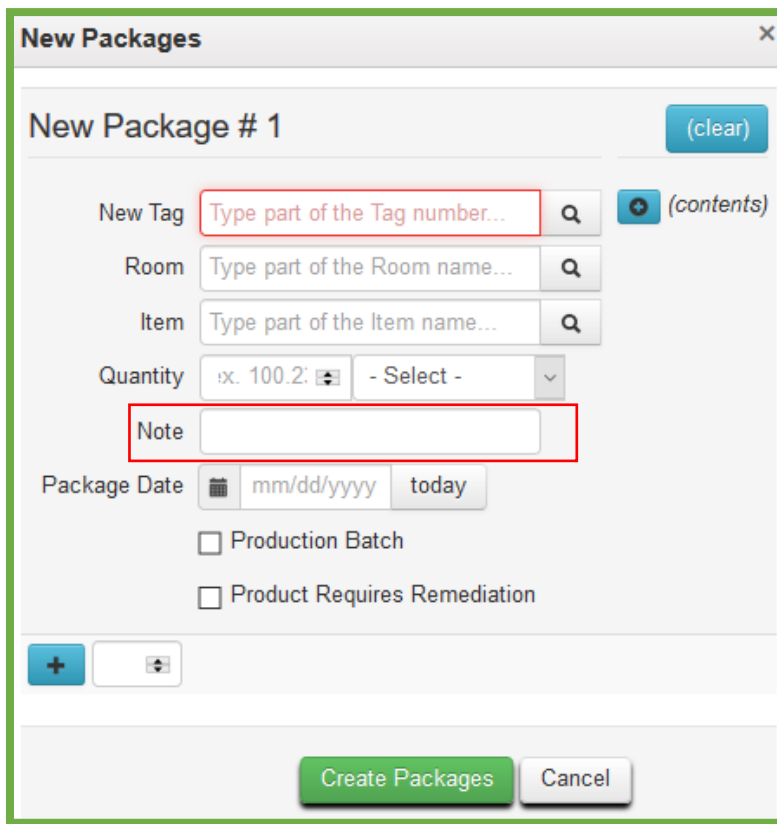
Home

Employment ☐ Owner at this Facility
☐ Manager at this Facility

Permissions

Permissions	Package Notes
Packages Page	
Grids (req'd)	<input type="checkbox"/> View
Inventory	<input type="checkbox"/> Manage
Create/Submit/Disc.	<input type="checkbox"/> Manage
Notes	<input type="checkbox"/> Manage
Transfers Menu	
Licensed & External	<input type="checkbox"/> Manage
Templates	<input type="checkbox"/> Manage
Hub	<input type="checkbox"/> Manage
Financials Menu	
All	<input type="checkbox"/> Manage
Reports Menu	
All	<input type="checkbox"/> View
Admin Menu	
Tag Orders	<input type="checkbox"/> Manage
Tags	<input type="checkbox"/> Manage
Strains	<input type="checkbox"/> Manage
Items	<input type="checkbox"/> Manage
Employees	<input type="checkbox"/> Manage

Figure 1: New Employee Permission for Package Notes



New Packages

New Package # 1 (clear)

New Tag Q + (contents)

Room Q

Item Q

Quantity - Select -

Note

Package Date today

☐ Production Batch

☐ Product Requires Remediation

+ ⬆

Create Packages Cancel

Figure 2: New Package Form

Tag	Src. H's	Src. Pkg's	Room	Item	Category	Quantity	P.B.	P.B. No.	Lab Testing	A.H.	Date	Rcv'd
ABCDEF012345670000014598	2018-06-23-Harvest Room-M	ABCDEF012345670000012253	Room 2	Buds - AK-47	Buds	2 g	No		SubmittedForTesting	No	06/14/2019	

Description	Employee	Date	Reported	Sources	External App
Packaged 2 Grams of Buds - AK-47 from another Package					
- Took 2 Grams of Buds - AK-47 from Package ABCDEF012345670000012253					
- Package Type: Product					
- Room: Room 2	METRC INDUSTRY ADMIN (X00***)	06/14/2019	06/14/2019 08:25 am	User	
- Note: R&D Test Sample					
- Required Lab Test Batches:					
--- R&D Testing					
Package's Lab Testing set to SubmittedForTesting	METRC INDUSTRY ADMIN (X00***)	06/14/2019	06/14/2019 08:25 am	User	

Page 1 of 1 20 rows per page Viewing 1 - 2 (2 total)

Figure 3: Package History

New Feature: Change Package Notes

If a package has been created without a note, or a licensee would like to update a previously created note, they can use the Change Notes button as seen in **Figure 4**. The button will trigger the action window seen within **Figure 5** where a licensee can enter a new note. All updates to package notes will be captured within the package's history tab in **Figure 6**.

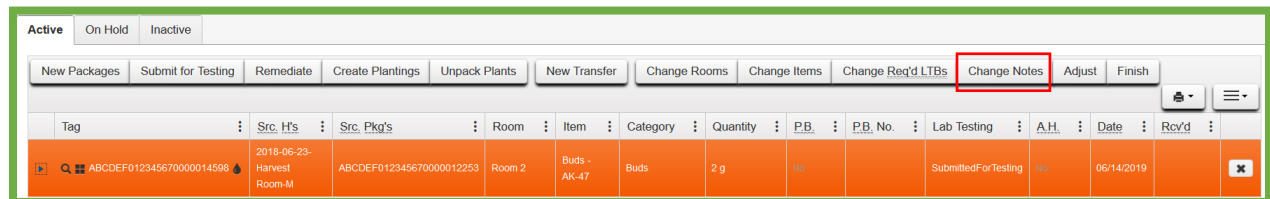


Figure 4: Packages Change Notes

Change Notes

Package # 1

(clear)

Package

ABCDEF012345670000014598

Q

Note

R&D Test Sample - Potency Only

+

Change Notes

Cancel

Figure 5: Change Package Notes

Tag	:	Src. H's	:	Src. Pkg's	:	Room	:	Item	:	Category	:	Item Strain	:	Quantity	:	P.B. No.	:	Lab Testing	:	A.H.	:	Dg
ABCDEF012345670000014598	:	2018-06-23-Harvest Room-M	:	ABCDEF012345670000012253	:	Lab Room	:	Buds - AK-47	:	Buds	:	AK-47	:	2 g	:		:	TestingInProgress	:	No	:	06

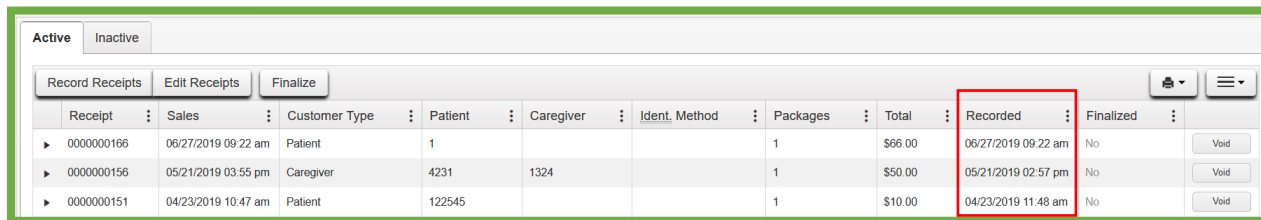
Reg'd Lab Test Batches |
 Lab Results |
 History

Description	:	Employee	:	Date	:	Reported	:	Sources	:
Packaged 2 Grams of Buds - AK-47 from another Package - Took 2 Grams of Buds - AK-47 from Package ABCDEF012345670000012253 - Package Type: Product - Room: Room 2 Note: R&D Test Sample - Required Lab Test Batches: --- R&D Testing	:	METRC INDUSTRY ADMIN (X00***)	:	06/14/2019	:	06/14/2019 08:25 am	:	User	:
Package's Lab Testing set to SubmittedForTesting	:	METRC INDUSTRY ADMIN (X00***)	:	06/14/2019	:	06/14/2019 08:25 am	:	User	:
Note: R&D Test Sample - Potency Only	:	METRC INDUSTRY ADMIN (X00***)	:		:	06/14/2019 08:47 am	:	User	:

Figure 6: Package History

New Column: Recorded Sales

The Sales Receipts grid now includes a 'Recorded' column representing the **actual** date/time the entry was created. As a reminder, licensees can enter data into Metrc three ways (Manual, CSV, or API) and the recorded column represents the time Metrc receives the information from any of those entry sources.



Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized	
▶ 000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No	Void
▶ 000000156	05/21/2019 03:55 pm	Caregiver	4231	1324		1	\$50.00	05/21/2019 02:57 pm	No	Void
▶ 000000151	04/23/2019 10:47 am	Patient	122545			1	\$10.00	04/23/2019 11:48 am	No	Void

Figure 7: Recorded Sales Receipts

Additional Information: Sales Receipts

The Sales Receipts grid now captures additional information for each package sold to a patient. When a user selects the drill-down arrow next to any package on a sales receipt they will now be able to reference the Required Lab Test Batches, Lab Results, and History for the package.

Active

Inactive

Record Receipts

Edit Receipts

Finalize

Receipt	Sales	Customer Type	Patient	Caregiver	Ident. Method	Packages	Total	Recorded	Finalized	
0000000166	06/27/2019 09:22 am	Patient	1			1	\$66.00	06/27/2019 09:22 am	No	Void

Package	Item	Category	Item Strain	Quantity	Total	Recorded
ABCDEF012345670000015421	Cannalicious Shatter	Concentrate (Each)		100 g	\$66.00	06/27/2019 09:22 am

Req'd Lab Test Batches

Lab Results

History

Please select a tab to view its content.

</

Figure 8: Additional Package Information

New Columns: Item Information

Users will now see additional columns outlined in **Figure 9** available within the packages, transfers, and sales grid for item specific fields that are related to the package.

As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.

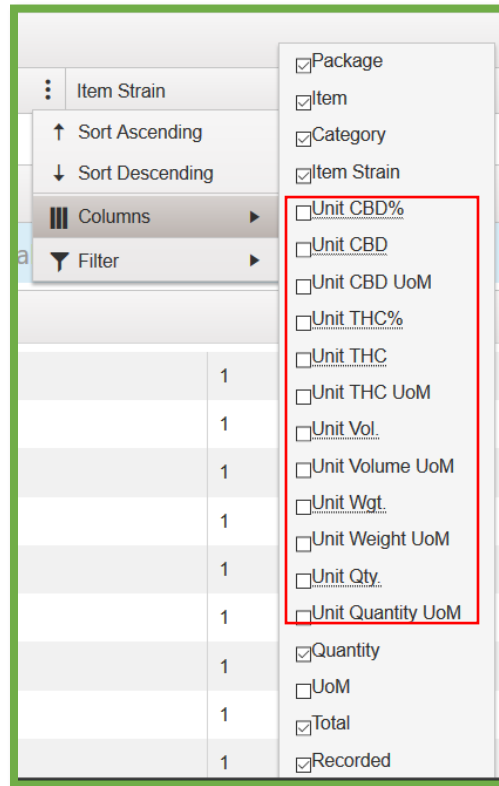


Figure 9: New Available Columns for Item Information

Additional Information: Sales Receipts

Users will now see additional information in **Figure 10** available when hovering over the magnifying glass of any package within their packages inventory or on an incoming transfer. This information is directly tied to the item created by the original licensee who created the package in Metrc.

As a reminder, each item created by a licensee is associated to an item category. These categories have required fields setup by the regulatory authority. If a column is N/A, then that field is not required when creating an item for that specific category.

Type	Product
Source Harvest(s)	2018-06-23-Harvest Room-H
Source Package(s)	ABCDEF012345670000013771
Item	Brownies (1OZ)
Category	Infused-Edible
Item Strain	N/A
Unit CBD Percent	N/A
Unit CBD Content	N/A
Unit THC Percent	N/A
Unit THC Content	N/A
Unit Volume	N/A
Unit Weight	16 oz
Item Serving Size	N/A
Item Supply Duration Days	N/A
Unit Quantity	N/A
Quantity	12 ea
Note	N/A
Production Batch	No
Trade Sample	No
Initial Lab Testing	TestPassed
Lab Testing	TestPassed
Lab Testing Date	04/19/2019
Process Val. Sample	No
Product Requires Remediat...	No
Contains Remediated Product	No
Administrative Hold	No
Packaged Date	04/19/2019
Status	Active

Figure 10: New Available Columns for Item Information

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