

Bulletin Number: CA_IB_2022_007	Distribution Date: 12/28/2022	Effective Date: 12/28/2022
Contact Point: Metrc® Support	Subject: New Features in Metrc	
Reason: Provide information on the latest feature release.		

Greetings Metrc® Users,

Metrc is pleased to provide information on the latest updates to the software that will be available on 12/28/2022. These enhancements include:

- I. Updates related to transfer rejections
- II. New directional field for transfers with layovers
- III. New optional field entries when recording sales

A detailed description of these enhancements is provided on the following pages.

Transfer Rejection Enhancements

A new *Inactive* tab has been added to the *Licensed Transfers* page as shown in **Figure 1** below. Rejected transfers move from the *Rejected* tab to the *Inactive* tab after the origin licensee processes and accepts in the rejection. This returns the rejected packages to the origin licensee's inventory.

In addition, the license number and license name of the rejecting business have been added to both the *Rejected* and *Inactive* tabs as shown in **Figure 1**.

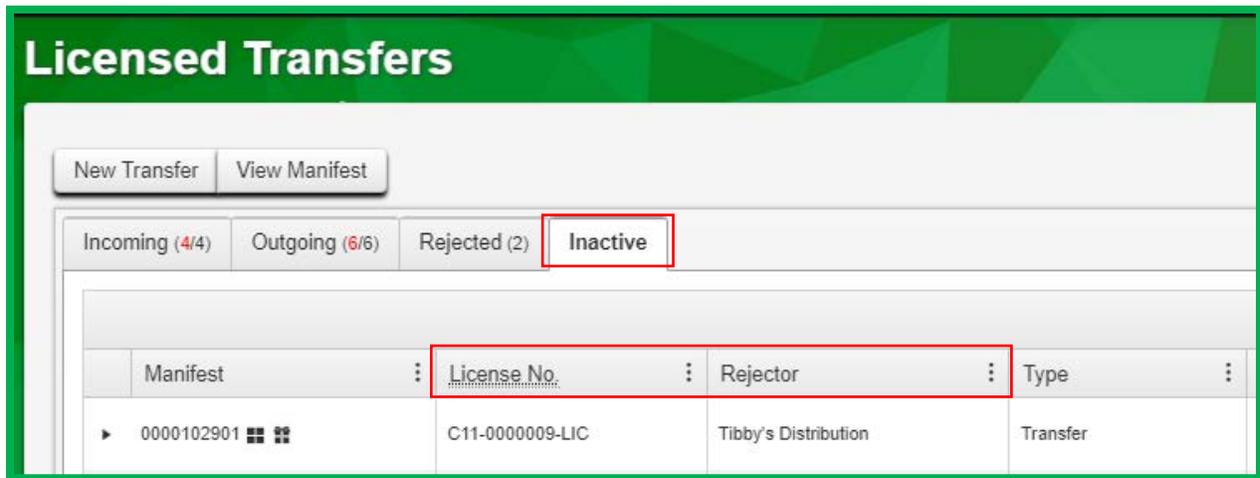
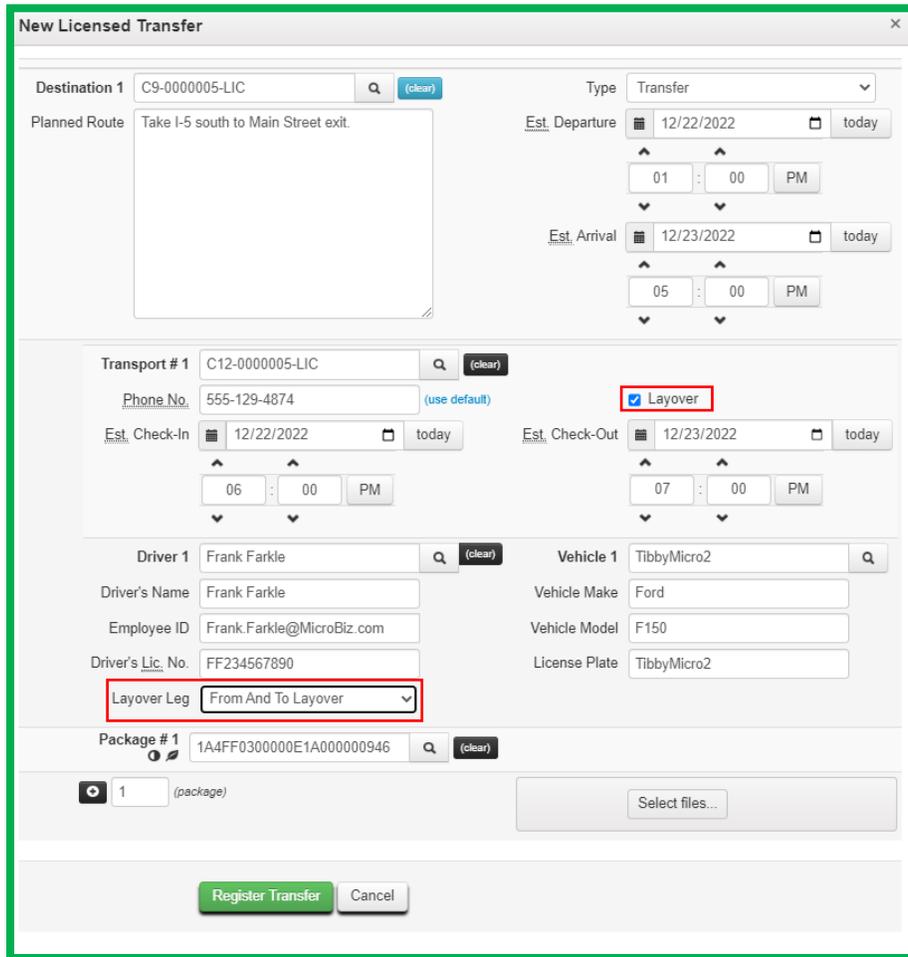


Figure 1: Licensed Transfers - Inactive Tab

New Layover Leg Field

A new *Layover Leg* field has been added to the *New/Edit Licensed Transfer* modals and the transfer manifest. It is enabled only when the *Layover* checkbox is marked as show in **Figure 2** below.



The screenshot shows the 'New Licensed Transfer' modal. Key elements include:

- Destination 1:** C9-0000005-LIC
- Type:** Transfer
- Planned Route:** Take I-5 south to Main Street exit.
- Est. Departure:** 12/22/2022, 01:00 PM
- Est. Arrival:** 12/23/2022, 05:00 PM
- Transport # 1:** C12-0000005-LIC
- Phone No.:** 555-129-4874
- Est. Check-In:** 12/22/2022, 06:00 PM
- Est. Check-Out:** 12/23/2022, 07:00 PM
- Driver 1:** Frank Farkle
- Vehicle 1:** TibbyMicro2
- Driver's Name:** Frank Farkle
- Vehicle Make:** Ford
- Employee ID:** Frank.Farkle@MicroBiz.com
- Vehicle Model:** F150
- Driver's Lic. No.:** FF234567890
- License Plate:** TibbyMicro2
- Layover Leg:** From And To Layover (dropdown menu)
- Package # 1:** 1A4FF0300000E1A000000946
- Buttons:** Register Transfer, Cancel

Figure 2: Layover Leg Field

There are three options that can be selected for the *Layover Leg* field:

- *From And to Layover*
- *From Layover*
- *To Layover*

In California, only one driver/vehicle can be designated for a transfer, so the *From And to Layover* option should be used.

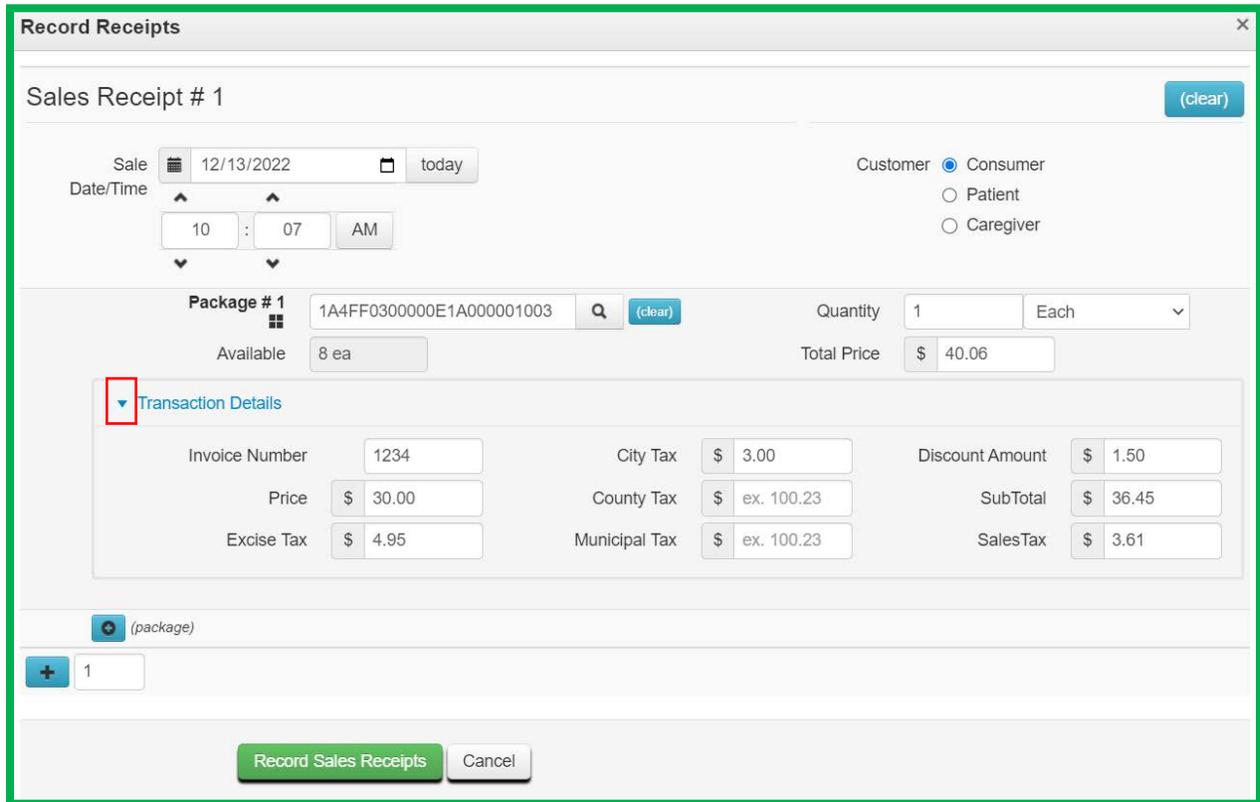
The *Layover Leg* field is also included on the manifest as shown in **Figure 3** below.

metrc		METRC®	
CANNABIS TRANSPORTATION MANIFEST			
All sales transactions are to be completed prior to transportation of any cannabis. The receiving entity may reject product delivered, but amount delivered must be limited to amount agreed upon in prior sales transaction.			
Manifest No.	0000117301	Date Created	12/22/2022 2:56 PM
Originating Entity	Tibby's Micro Biz	For Agency Use Only	
Originating License Number	C12-0000005-LIC		
Address of Originating Entity	9451 Markfield Way Unit 5 Sacramento, California 95829 County: Sacramento County APN: 81793947277277		
Phone No. of Originating Entity	555-129-4874		
1. Destination	Tibby's Retail	Destination Phone No.	555-129-4874
Destination License Number	C9-0000005-LIC	Date and Approx. Time of Departure	12/22/2022 1:00 PM
Address of Destination	9453 Markfield Way Unit 5 Sacramento, California 95829 County: Sacramento County	Date and Approx. Time of Arrival	12/23/2022 5:00 PM
		Date/Time Received	
		Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.)	
Route to be Traveled Take I-5 south to Main Street exit.			
1. Outbound Transporter	Tibby's Micro Biz	Layover Schedule	
Transporter License Number	C12-0000005-LIC	Date and Approx. Time of Check-In	12/22/2022 6:00 PM
Address of Transporter	9451 Markfield Way Unit 5 Sacramento, California 95829 County: Sacramento County APN: 81793947277277	Date and Approx. Time of Check-Out	12/23/2022 6:57 AM
Contact Phone No. for Inquiries: 555-129-4874			
Name of Person Transporting	Frank Farkle	Employee ID of Driver	Frank.Farkle@MicroBiz.c
State Driver's License No.	FF234567890	Signature of Person Transporting	
Make, Model, License Plate No.	Ford F150 TibbyMicro2	Leg of Layover Trip	From And To Layover
1. Package Shipped	Production Batch No.	Item Name	Quantity
1A4FF0300000E1A000001017 Lab Test: NotRequired		Skywalker Seed (Each) (Seeds (each))	Shp: 10.0000 ea
Item Details	Strain: Skywalker		

Figure 3: Layover Leg Field on Transfer Manifest

New Optional Fields for Sales

Several new optional fields will be available when recording sales receipts. To access the new fields, select the expand button for *Transaction Details* related to each package as shown in **Figure 4** below.



The screenshot shows a 'Record Receipts' window for 'Sales Receipt # 1'. It includes fields for 'Sale Date/Time' (12/13/2022, 10:07 AM), 'Customer' (Consumer, Patient, Caregiver), 'Package # 1' (1A4FF0300000E1A000001003), 'Quantity' (1), and 'Total Price' (\$ 40.06). A red box highlights the 'Transaction Details' expand button. Below it, the following fields are visible:

Invoice Number	1234	City Tax	\$ 3.00	Discount Amount	\$ 1.50
Price	\$ 30.00	County Tax	\$ ex. 100.23	SubTotal	\$ 36.45
Excise Tax	\$ 4.95	Municipal Tax	\$ ex. 100.23	SalesTax	\$ 3.61

Figure 4: Sales Receipt – Transaction Details - Optional Fields

Below is a list of the new fields, along with guidelines from the CDTFA on the values that should be entered in each field.

- *Invoice*
 - Invoice number which documents the sale to the customer, such as the invoice number from a Point of Sales system.
- *Price*
 - Pre-tax/net selling price before all taxes
- *Excise Tax*
 - The California state cannabis excise tax. For details on how to calculate excise tax refer to <https://www.cdtfa.ca.gov/industry/cannabis.htm>
- *City Tax*
 - Local business tax imposed by a local jurisdiction
- *County Tax*

- County tax imposed by a county, when applicable
- **Municipal Tax**
 - This field is not currently used in California
- **Discount**
 - Use this field to record the “below the line” discount, if any, applied to the overall ticket value
 - Enter the *Discount* as a positive value
- **Subtotal**
 - *Price + Excise Tax + City Tax + County Tax + Municipal Tax – Discount*
 - Do not include the *Sales Tax*
- **Sales Tax**
 - *California sales tax*

The value in the existing *Total Price* field for each package should be entered as the *Subtotal + Sales Tax*. Continuing from the example in **Figure 4** above with a *Subtotal* of \$36.45 and *Sales Tax* of 3.61, a value of 40.06 should be entered in the *Total Price* field as highlighted in **Figure 5** below.



The screenshot shows a software interface for entering sales receipt data. It includes a search bar for a package ID (1A4FF0300000E1A000001003), a quantity field set to 1, and a unit dropdown set to 'Each'. Below these is an 'Available' field with '8 ea'. The 'Total Price' field is highlighted with a red box and contains the value '\$ 40.06'.

Figure 5: Sales Receipt – Entry in Total Price Field

The *Transaction Details* can be viewed in the *Sales Receipt* drilldown by un hiding the columns as shown in **Figure 6** below. To unhide the columns click on the three vertical dots on any column in the drilldown and select the *Columns* option from the menu. Mark the checkboxes for the columns you wish to display.

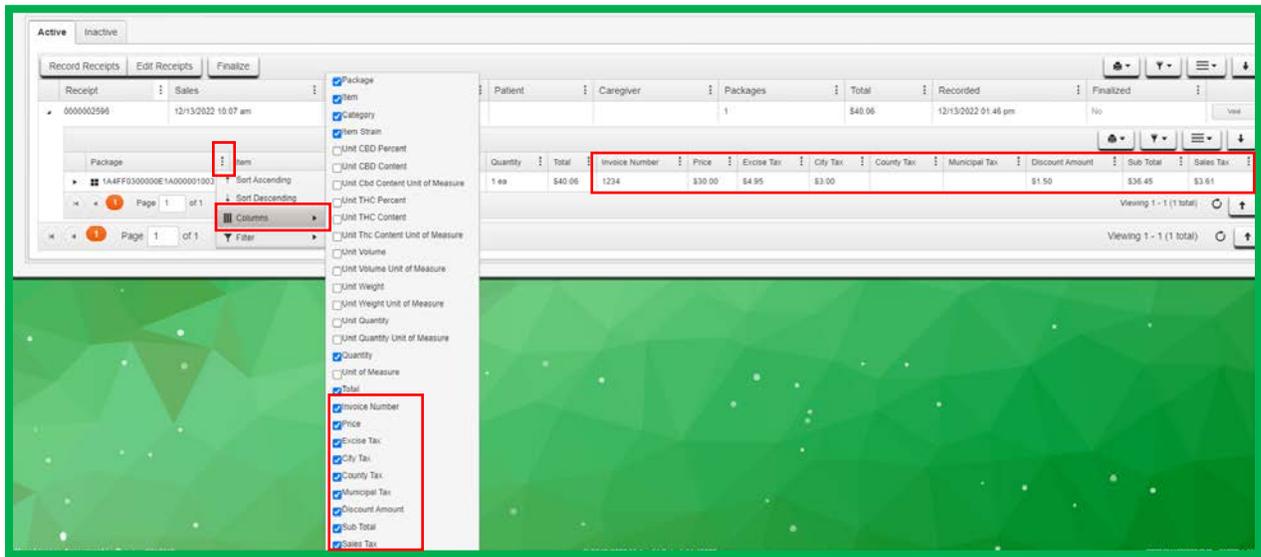


Figure 6: Sales Receipt –Transaction Details Tab

The new optional fields can also be entered using the CSV import feature in Metrc. The on-page formatting guide for the *New and Update Sales Receipts Imports* has been updated to provide direction of how to create these CSV files. **Figure 7** below shows the updates to the *New Sales Receipts Import*.

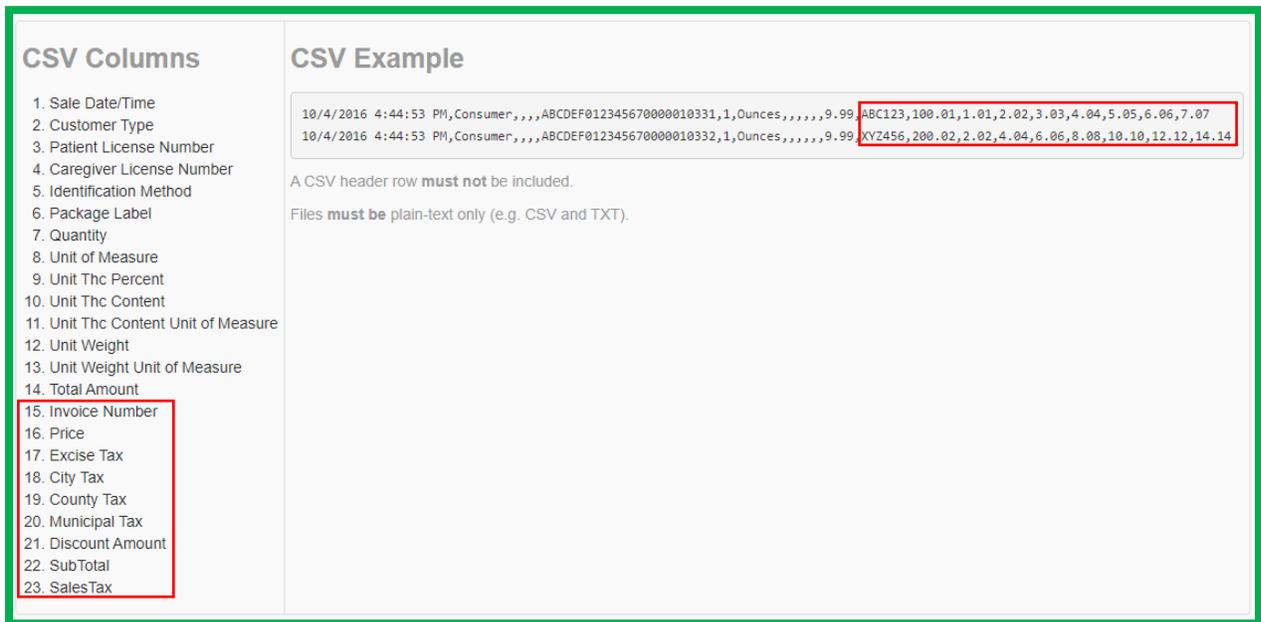


Figure 7: On-Page CSV Guide - New Sales Receipt Import

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