

<b>Bulletin Number:</b> CA_IB_2022_008	<b>Distribution Date:</b> 12/30/2022	<b>Effective Date:</b> 12/29/2022
<b>Contact Point:</b> Metrc® Support	<b>Subject:</b> Tracking Retailer Deliveries	
<b>Reason:</b> Provide information on the latest feature to track retailer deliveries.		

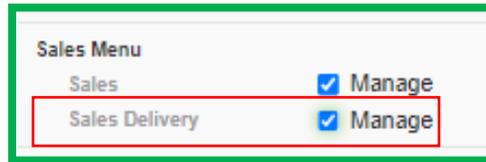
Greetings Metrc® Users,

New functionality has been integrated into Metrc that allows retailers to track deliveries by generating a *Delivery Inventory Ledger* for all cannabis goods that will be provided to their drivers (in regulation referred to as delivery employees) to carry in their vehicles. Although use of this functionality is not required until April 1, 2023, the functionality is available now. For information on regulatory requirements refer to the Department of Cannabis Control's website at <https://cannabis.ca.gov/>.

A detailed description of this new feature is provided on the following pages.

## Tracking Retailer Deliveries

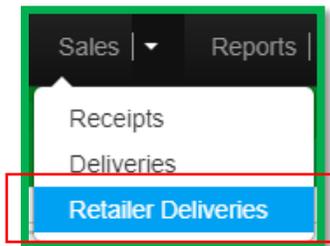
In order for employees to use the new functionality to track retailer deliveries, the *Sales Delivery* permission must be enabled as shown in **Figure 1** below.



**Figure 1: Employee Permissions - Sales Delivery Option**

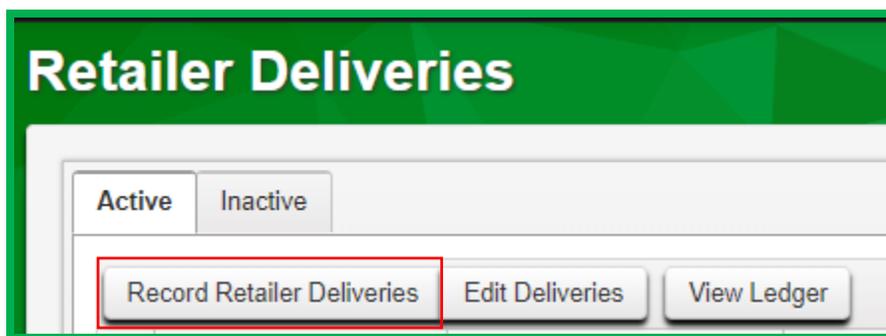
Before the cannabis goods leave the licensed premises with a driver in a delivery vehicle for a delivery trip, licensees will access the new functionality by selecting the *Retailer Deliveries* option from the *Sales* menu in the top navigation bar as shown in **Figure 2** below.

Do not select the *Deliveries* option on the *Sales* menu when creating a delivery trip. This option will be used when scheduled cannabis goods deliveries have been made or cancelled.



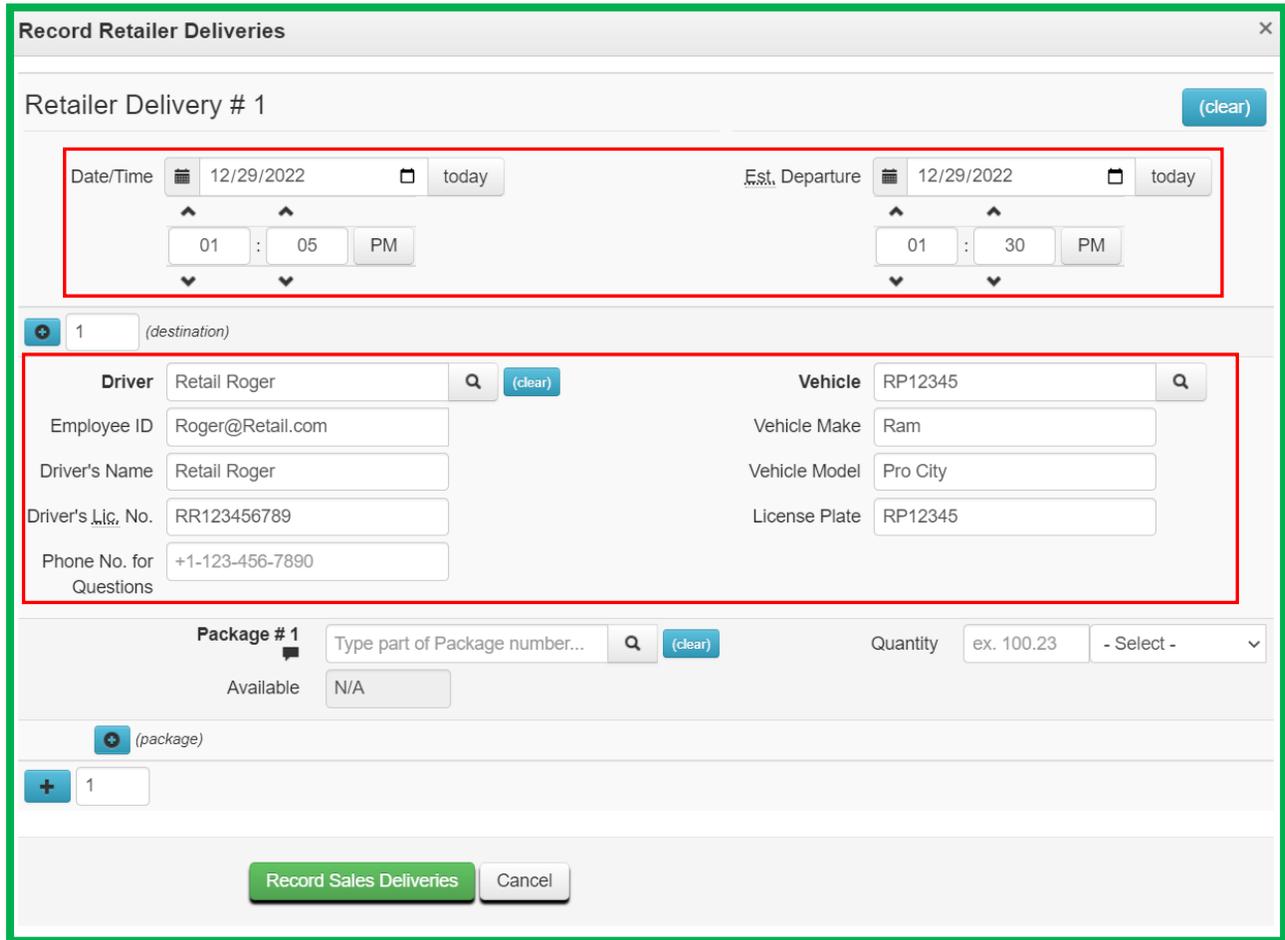
**Figure 2: Sales Menu – Retailer Deliveries Option**

On the *Retailer Deliveries* page, select the *Active* tab, then select the *Record Deliveries* button as shown in **Figure 3** below.



**Figure 3: Record Retailer Deliveries Button**

On the *Record Retailer Deliveries* modal enter the date and time the delivery was created, the date and time of the estimated departure, and the driver and vehicle information as highlighted below in **Figure 4**. Commonly used drivers and vehicles can be set-up in advance by employees granted the *Manage Transporters* permission and then selected using the magnifying glass lookup to populate the required information.

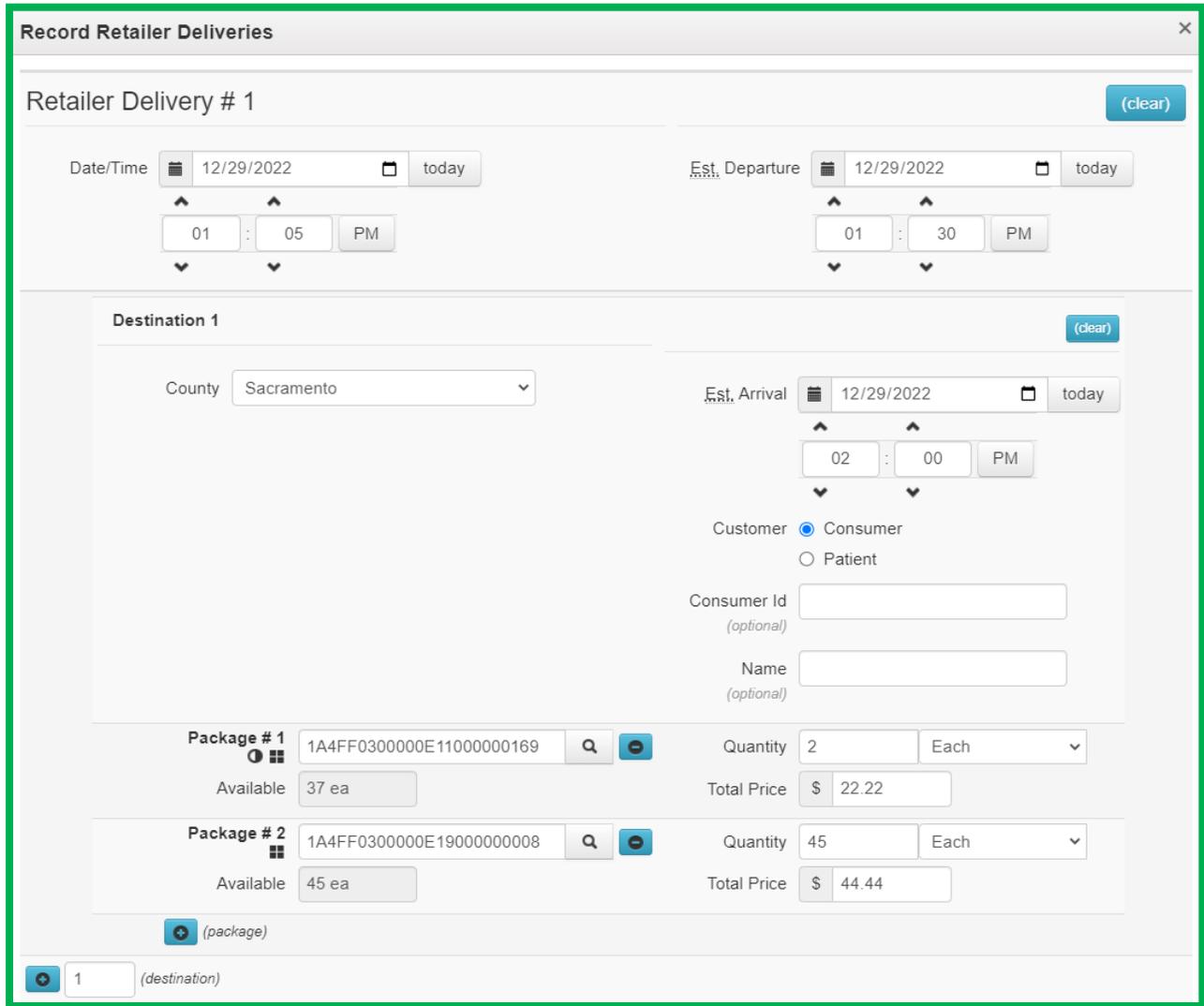


**Figure 4: Record Retailer Deliveries**

To enter orders that have been received and processed by the licensed retailer before the driver leaves the licensed premises, add one or more destinations using the add destination button . A destination should be used for each order that will have a unique delivery location.

This will insert a *Destination* section, highlighted in **Figure 5** below, for selecting the county where the delivery is to be made, the estimated arrival time, the type of customer, the package(s) or partial package(s) (in regulation referred to as UID) to be delivered, the quantity to be delivered from each package, and the total price of the item. Please note that

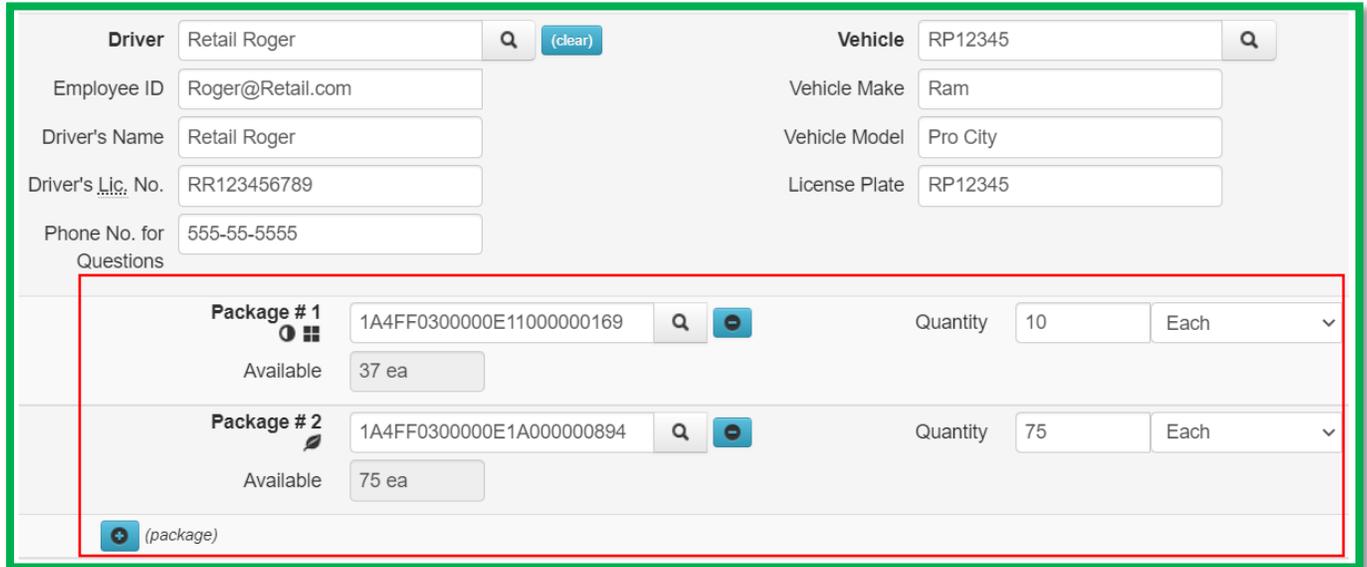
the new optional fields for sales have not yet been implemented for *Retailer Deliveries* but is planned for the near future.



**Figure 5: Record Scheduled Deliveries**

Once the destination has been entered, select the  button to add all packages that have been ordered prior to departure and are being delivered to that single destination. In **Figure 5** above *Package #1* is an example of a partial package (Quantity < Available) and *Package #2* is an example of a sale of an entire package (Quantity = Available).

To record cannabis goods carried in the delivery vehicle for potential sales, enter those package(s) and/or partial package(s) in the section below the driver and vehicle information as shown in **Figure 6** below.



**Driver** Retail Roger

**Vehicle** RP12345

Employee ID Roger@Retail.com

Vehicle Make Ram

Driver's Name Retail Roger

Vehicle Model Pro City

Driver's Lic. No. RR123456789

License Plate RP12345

Phone No. for Questions 555-55-5555

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**Package # 1**

Quantity

Available

---

**Package # 2**

Quantity

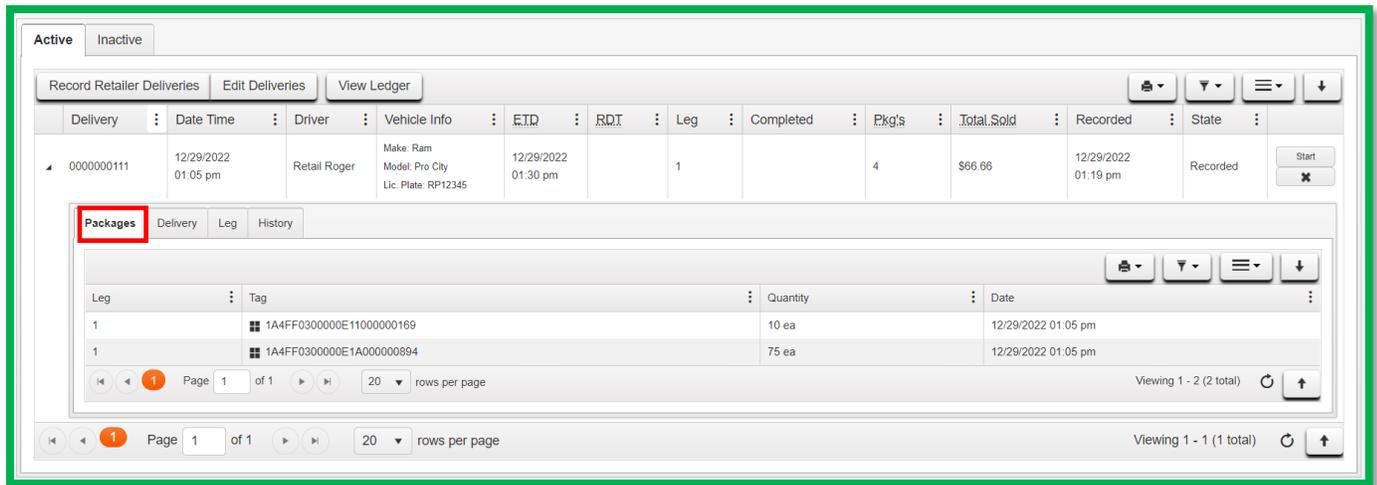
Available

(package)

**Figure 6: Record Product Carried in the Vehicle for Potential Sales**

When all the necessary information is recorded, click the green *Record Sales Deliveries* button to save the delivery. The packages on the delivery will remain in the inventory of the licensee and the quantity adjusted for the amount taken in the delivery vehicle.

On the *Retail Deliveries* page, the information just entered pertaining to the retailer delivery can be viewed. By clicking on the dropdown arrow next to the delivery number, the *Packages* tab displays the packages and quantities on the delivery for potential sales as shown in **Figure 7** below.



Active Inactive

Record Retailer Deliveries Edit Deliveries View Ledger

Delivery	Date Time	Driver	Vehicle Info	EID	RDI	Leg	Completed	Pkg's	Total Sold	Recorded	State
000000111	12/29/2022 01:05 pm	Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 01:30 pm		1		4	\$66.66	12/29/2022 01:19 pm	Recorded

**Packages** Delivery Leg History

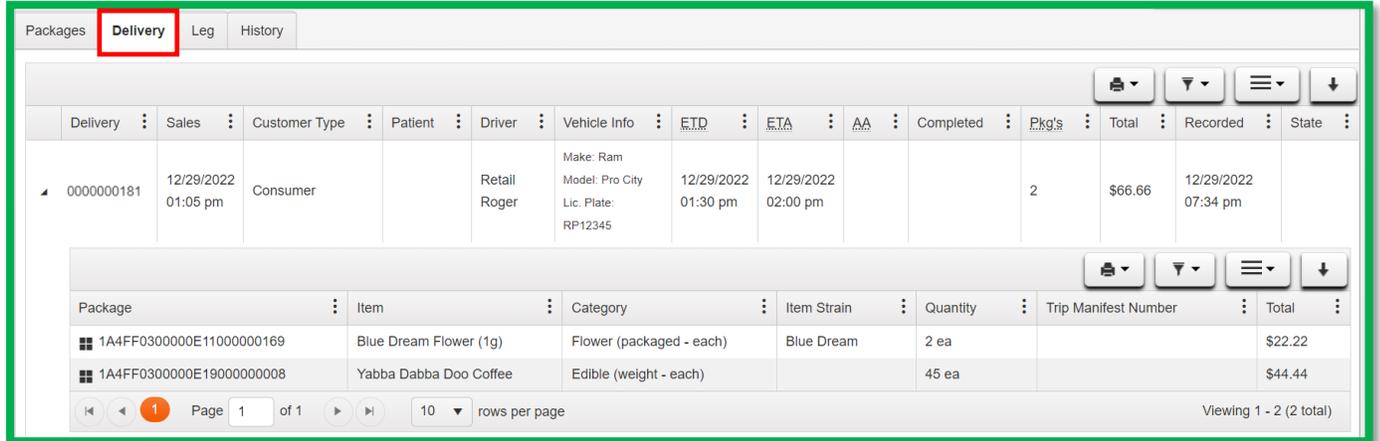
Leg	Tag	Quantity	Date
1	1A4FF0300000E11000000169	10 ea	12/29/2022 01:05 pm
1	1A4FF0300000E1A000000894	75 ea	12/29/2022 01:05 pm

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

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

**Figure 7: Packages Tab – Packages for Potential Sales**

The *Delivery* tab shown in **Figure 8** below displays the orders processed before the delivery trip begins, including a delivery id, driver and vehicle information and estimated date/time of departure and arrival. Clicking on the dropdown arrow next to each delivery provides information on the packages included in that delivery trip.



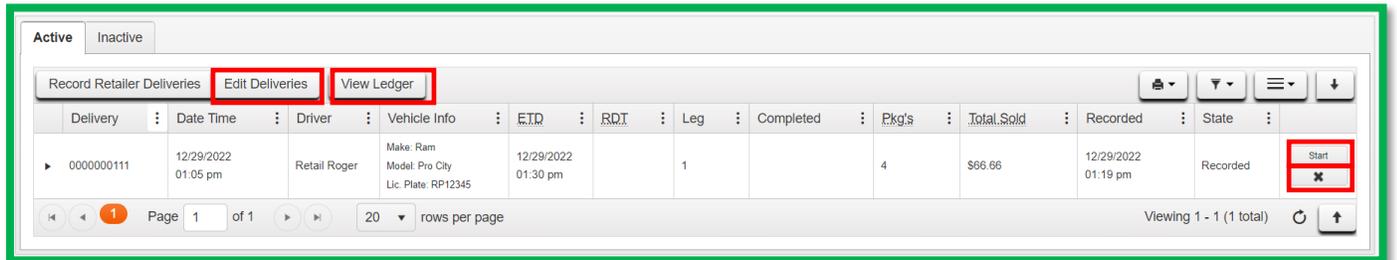
Delivery	Sales	Customer Type	Patient	Driver	Vehicle Info	E.T.D.	E.T.A.	AA	Completed	Pkg.s	Total	Recorded	State
0000000181	12/29/2022 01:05 pm	Consumer		Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 01:30 pm	12/29/2022 02:00 pm			2	\$66.66	12/29/2022 07:34 pm	

Package	Item	Category	Item Strain	Quantity	Trip Manifest Number	Total
1A4FF0300000E11000000169	Blue Dream Flower (1g)	Flower (packaged - each)	Blue Dream	2 ea		\$22.22
1A4FF0300000E19000000008	Yabba Dabba Doo Coffee	Edible (weight - each)		45 ea		\$44.44

**Figure 8: Delivery Tab – Scheduled Deliveries and Package Information**

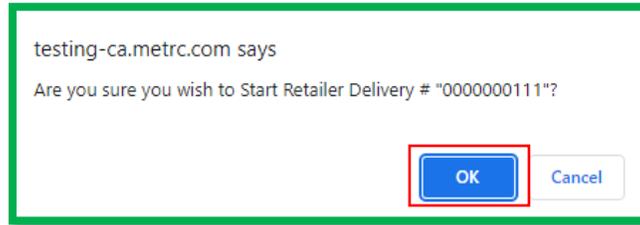
Before recording the departure of the driver and vehicle from the licensed premises to begin the delivery trip, the delivery information can be updated using the *Edit Deliveries* button above the *Retail Deliveries* grid or discontinued using the “X” button at the far-right of the delivery row as highlighted in **Figure 9** below.



Delivery	Date Time	Driver	Vehicle Info	E.T.D.	R.D.T.	Leg	Completed	Pkg.s	Total Sold	Recorded	State	
0000000111	12/29/2022 01:05 pm	Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 01:30 pm		1		4	\$66.66	12/29/2022 01:19 pm	Recorded	Start X

**Figure 9: Retailer Delivery Before Departure**

To record the departure of the driver and vehicle from the licensed premises for the delivery trip, select the *Start Driving* button on the far-right of the delivery row as shown in **Figure 9** above and select the *OK* button on the confirmation pop-up box shown in **Figure 10** below.



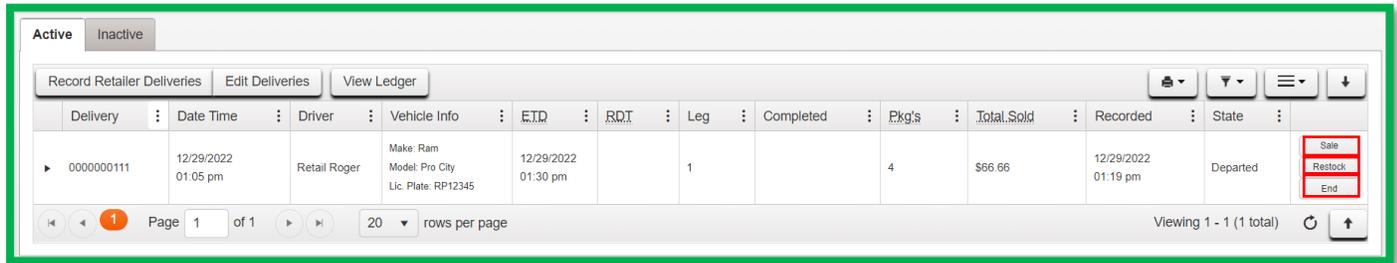
**Figure 10: Start Driving Confirmation Pop-up Box**

To view or print the most up-to-date copy of the *Delivery Inventory Ledger* at any time, highlight the retailer delivery row and then select the *View Ledger* button, which is also highlighted in **Figure 9** above. Inside the PDF file that displays when the *View Ledger* button is selected, there will be a ledger for unplanned deliveries and a ledger for each destination corresponding to orders that have already been received and processed by the licensed retailer. An example of the *Delivery Inventory Ledger* is shown in **Figure 11** below.

METRC® DELIVERY INVENTORY LEDGER		
Ledger #:	0000000111	Date / Time Completed:
License # of Originating Entity:	C9-0000005-LIC	For Agency Use Only
Name of Originating Entity:	Tibby's Retail	
Address of Originating Entity:	9453 Markfield Way Unit 5 Sacramento, California 95829	
Phone No. of Originating Entity:	555-129-4874	
Contact Phone No. for Inquiries:	555-55-5555	
Address of Destination:		Date and Approximate Time of Departure: 12/29/2022 1:30 PM
		Date and Approximate Time of Arrival:
Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.)		
Recipient Name:		
Patient Registry Number:		
Delivery Notes: details for deliveries that can not be completed		
Item Description	Item Label	Weight/Quantity
Blue Dream Flower (1g)	1A4FF030000E1100000169	10.0000 ea
Skywalker Tissue Culture	1A4FF030000E1A000000894	75.0000 ea
PRODUCT REJECTION (if only a portion of shipment is rejected, circle that portion above)		
Name of Person Receiving or Rejecting Product:		
I confirm that the contents of this shipment match weight records entered above, and I agree to take custody of those portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.		
Signature:		Date:
Signature of individual taking receipt of rejected portion of this shipment:		
Name of Person Transporting:	Retail Roger	License No. of Person Transporting: Roger@Retail.com
Signature of Person Transporting:		
Make, Model, License Plate No.:	Ram Pro City RP12345	

**Figure 11: Delivery Inventory Ledger**

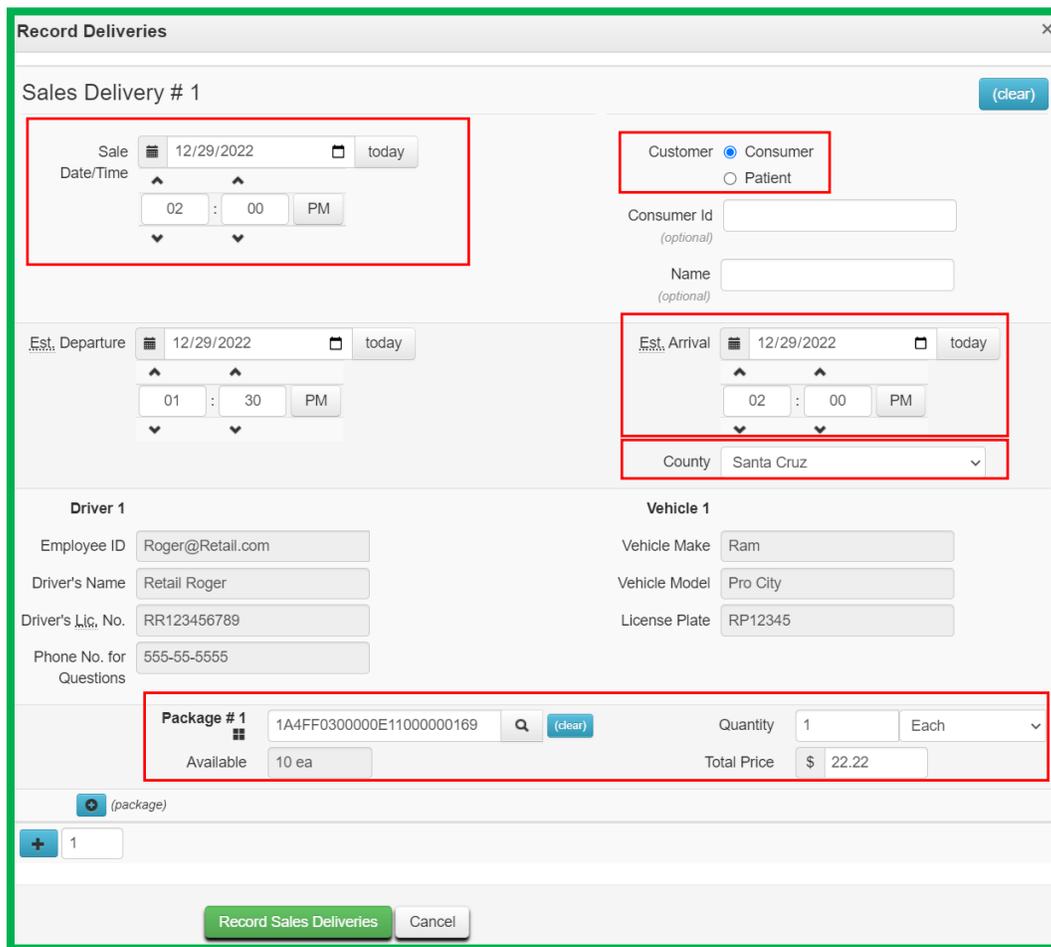
The *State* of the delivery is changed from *Recorded* to *Departed* and three new buttons display on the delivery row as highlighted in **Figure 12** below.



Delivery	Date Time	Driver	Vehicle Info	E.T.D	R.O.T	Leg	Completed	Pkg's	Total Sold	Recorded	State	Buttons
0000000111	12/29/2022 01:05 pm	Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 01:30 pm		1		4	\$66.66	12/29/2022 01:19 pm	Departed	<input type="button" value="Sale"/> <input type="button" value="Restock"/> <input type="button" value="End"/>

**Figure 12: Sale, Restock and End Buttons**

The *Sale* button is used to record sales from packages included in the vehicle on the delivery trip for potential sales. When the *Sale* button is selected the *Record Deliveries* modal displays as shown in **Figure 13** below.



**Record Deliveries**

Sales Delivery # 1 (clear)

Sale Date/Time: 12/29/2022 today  
02 : 00 PM

Customer:  Consumer  Patient

Consumer Id (optional):

Name (optional):

Est. Departure: 12/29/2022 today  
01 : 30 PM

Est. Arrival: 12/29/2022 today  
02 : 00 PM

County: Santa Cruz

**Driver 1**

Employee ID: Roger@Retail.com

Driver's Name: Retail Roger

Driver's Lic. No.: RR123456789

Phone No. for Questions: 555-55-5555

**Vehicle 1**

Vehicle Make: Ram

Vehicle Model: Pro City

License Plate: RP12345

Package # 1: 1A4FF0300000E11000000169 (clear)

Quantity: 1 Each

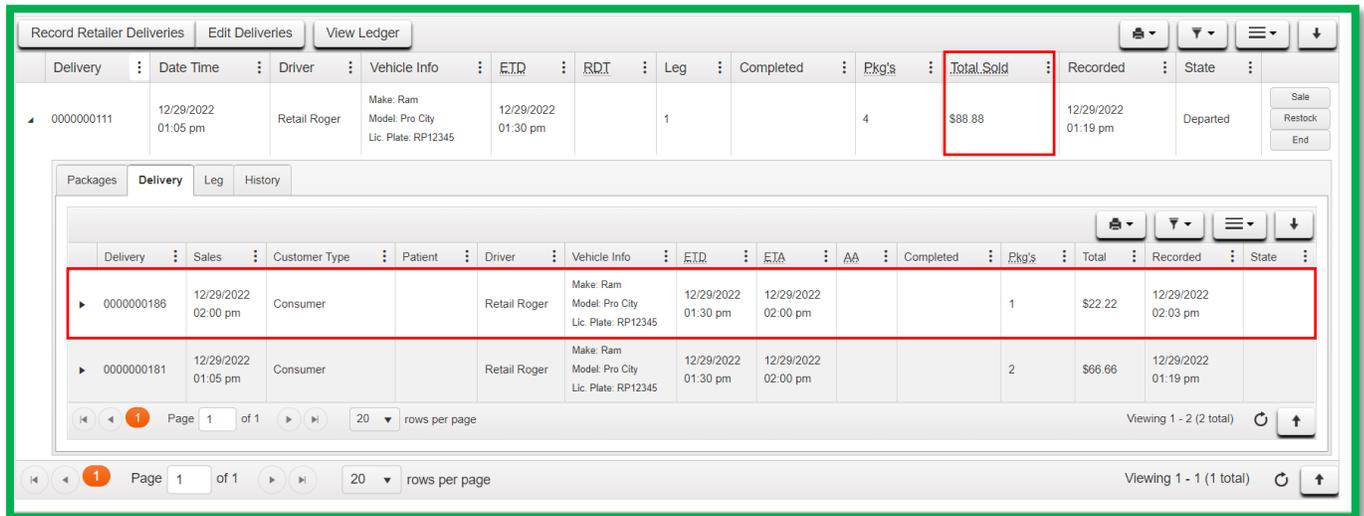
Available: 10 ea Total Price: \$ 22.22

(package)

1

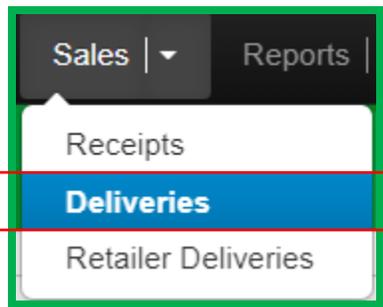
**Figure 13: Record Sales from Potential Sale Packages**

On the *Record Deliveries* modal, record the sale date/time, customer type, estimate date/time of arrival, county where the delivery is made, and the package(s) and quantity sold from each. Only packages originally added to the delivery trip for potential sales can be selected. When all the updates are made, select the green *Record Sales Deliveries* button. The quantity sold from each package is decremented by the quantity sold, the *Total Sold* column is incremented by the *Total Price* of each package sold, and a delivery id is assigned as shown in the *Delivery* tab highlighted in **Figure 14** below. As product sales/deliveries are recorded, the quantities on the *Delivery Inventory Ledger* are updated to reflect the remaining inventory in the vehicle.



**Figure 14: Retailer Delivery – Total Sold and Delivery Record**

To record that scheduled cannabis goods deliveries have been made or cancelled, take note of the delivery id in the *Delivery* tab, and then select the *Deliveries* option from the *Sales* menu in the top navigation bar as highlighted in **Figure 15** below.



**Figure 15: Sales Menu – Deliveries Option**

Locate the delivery on the *Sales Deliveries* page. On the far-right side of the delivery row there are *Complete* and *Void* buttons as shown in **Figure 16** below.

Sales Deliveries														Tibby's Retail   C9-0000005-LIC		
Active														California Testing		
Delivery	Transporter	Sales	Customer Type	Patient	Driver	Vehicle Info	ETD	ETA	AA	Completed	Pkgs	Total	Recorded	State	Complete	Void
0000000181	N/A	12/29/2022 01:05 pm	Consumer		Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 01:30 pm	12/29/2022 02:00 pm			2	\$86.66	12/29/2022 01:19 pm	Shipped	Complete	Void

**Figure 16: Sales Delivery Grid – Complete and Void Buttons**

If the delivery has been cancelled, select the *Void* button and select *OK* on the confirmation pop-up box. This will void the delivery and adjust the package(s) by the quantities specified on the delivery.

If the delivery has been made, select the *Complete* button. On the *Complete Delivery* modal shown in **Figure 17**, enter the actual date/time of arrival. If the customer refused delivery of any package or partial package in the delivery, mark the *Reject Package* checkbox, specify the amount refused in *Verification* field, select a *Return Reason*, and enter a *Required Note* explaining the rejection. Select the green *Complete Sales Delivery* to complete the delivery.

**Complete Delivery** ✕

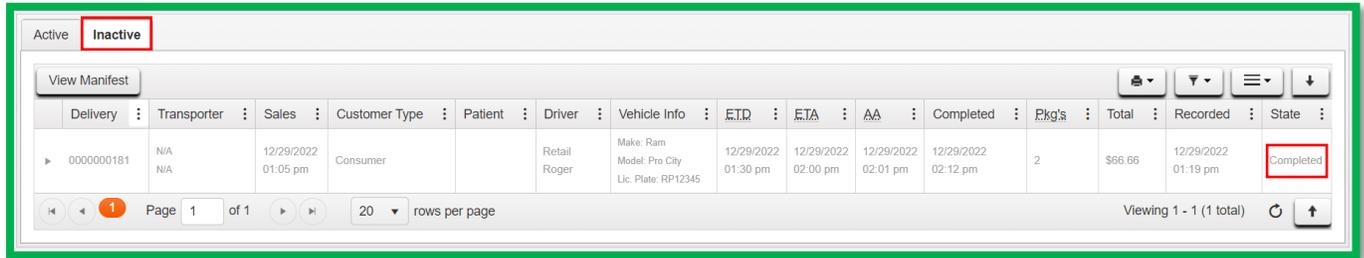
Employee ID: Roger@Retail.com	Vehicle Make: Ram
Driver's Name: Retail Roger	Vehicle Model: Pro City
Driver's Lic. No.: RR123456789	License Plate: RP12345
Phone No. for Questions: 555-55-5555	Actual Arrival: 12/29/2022 today
	02 : 01 PM

Package # 1 Item: Blue Dream Flower (1g)	Quantity: 2 ea <input checked="" type="checkbox"/> Reject Package Verification: 1 Each Return Reason: Incorrect Quantity Required Note: Customer order just 1.
Package # 2 Item: Yabba Dabba Doo Coffee	Quantity: 45 ea <input type="checkbox"/> Reject Package

Complete Sales Delivery
Cancel

**Figure 17: Complete Scheduled Delivery**

The completed delivery moves from the *Active* tab to the *Inactive* tab on the *Sales Deliveries* page and the *State* is updated to *Completed* as shown in **Figure 18** below.



The screenshot shows the 'Inactive' tab selected. A table displays a single manifest entry with the following data:

Delivery	Transporter	Sales	Customer Type	Patient	Driver	Vehicle Info	ETD	ETA	AA	Completed	Pkg's	Total	Recorded	State
0000000181	N/A N/A	12/29/2022 01:05 pm	Consumer		Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 01:30 pm	12/29/2022 02:00 pm	12/29/2022 02:01 pm	12/29/2022 02:12 pm	2	\$66.66	12/29/2022 01:19 pm	Completed

At the bottom of the table, it indicates 'Page 1 of 1' and '20 rows per page'. The 'State' column for the entry is highlighted with a red box and labeled 'Completed'.

**Figure 18: Inactive Tab - Completed Manifest**

If the driver and vehicle return to the licensed premises to return cannabis goods or pick-up additional cannabis goods for potential sales on the same delivery trip, the *Restock* button on the *Retail Deliveries* page, as shown in **Figure 12** above, can be used to add and remove cannabis goods from the inventory in the delivery vehicle. On the *Restock Delivery* modal, update the estimated departure date and time from the licensed premises after restocking, indicate any packages or partial packages being removed from the delivery vehicle inventory and the quantity being removed, and add any new packages or partial packages being loaded into the delivery vehicle for potential sales as highlighted in **Figure 19** below.

Retailer Delivery: 0000000111

Date/Time: 12/29/2022 today

01 : 05 PM

Est. Departure: 12/29/2022 today

02 : 20 PM

1 (destination)

**Driver**

Employee ID: Roger@Retail.com

Driver's Name: Retail Roger

Driver's Lic. No.: RR123456789

Phone No. for Questions: 555-55-5555

**Vehicle**

Vehicle Make: Ram

Vehicle Model: Pro City

License Plate: RP12345

<b>Current Package # 1</b>	1A4FF0300000E11000000169	Depart Quantity: 9	Each
Available	26 ea	Restock Quantity:	9 Each
Remove	<input type="checkbox"/>		

<b>Current Package # 2</b>	1A4FF0300000E1A000000894	Depart Quantity: 75	Each
Available	0 ea	End Quantity:	75 Each
Remove	<input checked="" type="checkbox"/>		

<b>Adding Package # 1</b>	1A4FF0300000E15000000100 <input type="text" value=""/> <input type="button" value="clear"/>	Quantity: 25	Each
Available	51 ea		

1 (package)

**Figure 19: Restock Delivery**

When the green *Restock Sales Delivery* button is selected, the *State* of the retailer delivery changes from *Departed* to *Restocked* and the *Start* and *End* buttons are enabled on the delivery row. At this point the *Start* button will be selected to indicate that the driver and vehicle departed on the second leg to make further deliveries.

Active Inactive

Record Retailer Deliveries Edit Deliveries View Ledger

Delivery	Date Time	Driver	Vehicle Info	ETD	RDT	Leg	Completed	Pkg's	Total Sold	Recorded	State	
▶ 0000000111	12/29/2022 01:05 pm	Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 02:20 pm	12/29/2022 02:23 pm	2		2	\$88.88	12/29/2022 01:19 pm	Restocked	<input type="button" value="Start"/> <input type="button" value="End"/>

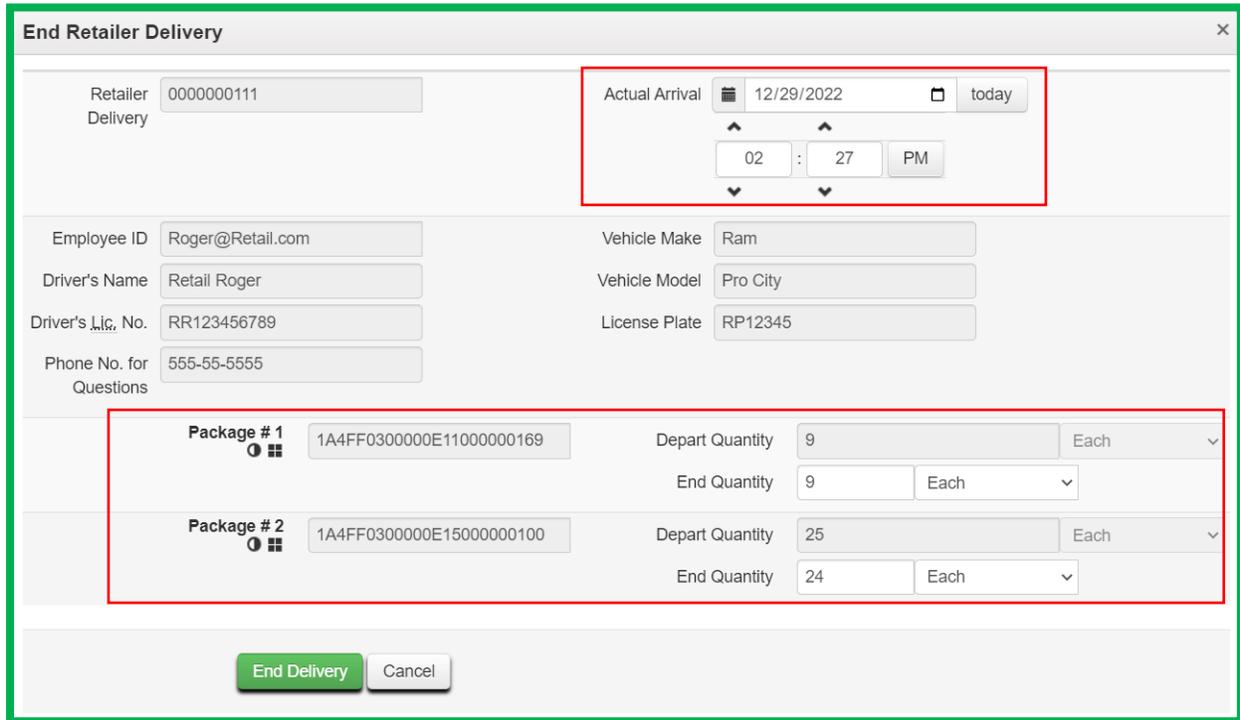
Page 1 of 1

20 rows per page

Viewing 1 - 1 (1 total)

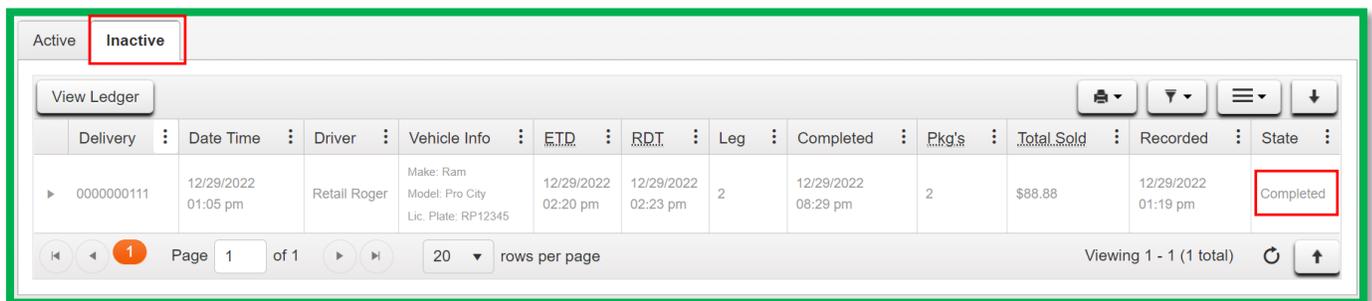
**Figure 20: Retailer Delivery After Restock**

When a driver and vehicle return to the licensed premises or when a driver has no remaining inventory and does not return to the licensed premises, the delivery can be completed by selecting the *End* button. On the *End Retailer Delivery* modal, the actual arrival date/time should be entered, as well as the quantities of each package taken off the vehicle and returned to licensed premises as highlighted below in **Figure 21**. The package quantities will be adjusted by the *End Quantity*.



**Figure 21: End Retailer Delivery**

Once the delivery is ended, no additional activity can be entered on the *Retailer Delivery*. The *State* is updated to *Completed* and the retailer delivery is moved to the *Inactive* tab as shown in **Figure 22** below.



Delivery	Date Time	Driver	Vehicle Info	E.T.D.	R.D.T.	Leg	Completed	Pkg's	Total Sold	Recorded	State
0000000111	12/29/2022 01:05 pm	Retail Roger	Make: Ram Model: Pro City Lic. Plate: RP12345	12/29/2022 02:20 pm	12/29/2022 02:23 pm	2	12/29/2022 08:29 pm	2	\$88.88	12/29/2022 01:19 pm	Completed

**Figure 22: Retailer Delivery After End Delivery**

Please feel free to contact support at [support@metrc.com](mailto:support@metrc.com) or 877-566-6506 with any questions.