

Bulletin Number: CO_IB_1.1.20	Distribution Date: 1/3/20	Effective Date: 1/1/20
Contact Point: Metrc® Support	Subject: Legislative Configuration Changes in Metrc	
Reason: Metrc is providing an update on our newest changes in the software based on the legislative changes that will be available on January 1 st , 2020.		

Greetings Metrc Users,

Metrc is pleased to provide information on our newest configuration enhancements within the software that is currently available.

All Medical Marijuana Store types will now have the ability to record sales deliveries to a qualifying patient. The Metrc Admin for each respective license will see a new selectable Deliveries option beneath the Sales tab. To conduct deliveries, the license must have the appropriate permits from the MED.

Medical and Retail Testing Facilities will now have a new transfer drop down option available within their license to record the intake of Industrial Hemp Products from CDPHE Registrants that are not operating directly in Metrc. This type of transfer is recognized as an External Incoming Transfer and will require a separate process than the current Licensed Transfer being used for all other Metrc related inventory transfers.

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

Software Update for Sales Deliveries

With the configuration change implemented for sales deliveries, any employee who needs access must be granted the permission by the Metrc admin, or an employee who can update employee permissions. The permission will only be found within the **Sales Menu**.

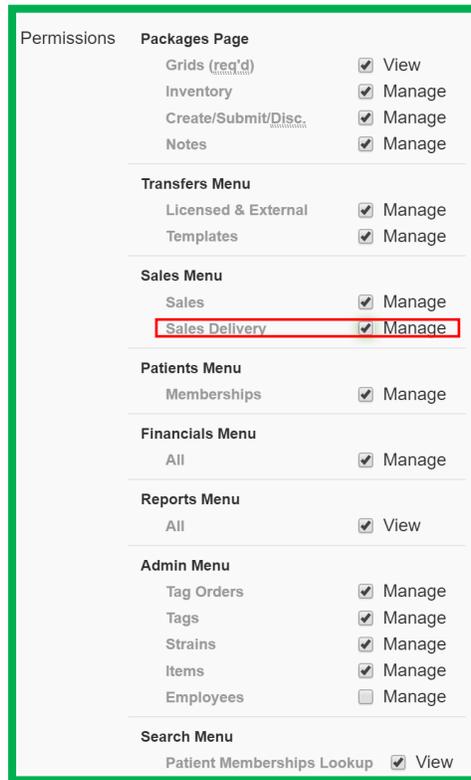


Figure 1: Employee Permissions

Once the permission is granted to a user, the sales delivery option can be found beneath the sales area on the navigation pane.

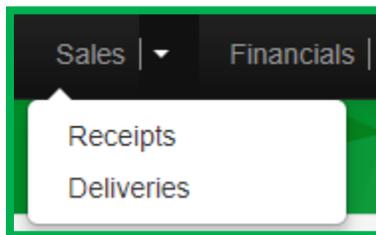


Figure 2: Selectable Sales Options

In Metrc, sales deliveries are reported differently than in-store sales receipts. Reporting a sales delivery as an in-store sales receipt within Metrc will not meet the regulatory requirements and may cause a sale to be reported twice. To differentiate the two, please see the following.

- Sales receipts would indicate the transaction took place within the licensed premise of the Medical facility.
- Sales delivery would indicate active inventory was taken off the facilities licensed premises and delivered to a patient.
- All Medical Marijuana Store's should never be recording the same transaction as a sales receipt and delivery.

Just like a transfer manifest is created within Metrc, a sales delivery manifest is required to be created as soon as the order has been placed by the patient. When recording the necessary information within the sales delivery manifest, it is important to ensure the patient number accurately reflect the card number provided to the Dispensary.

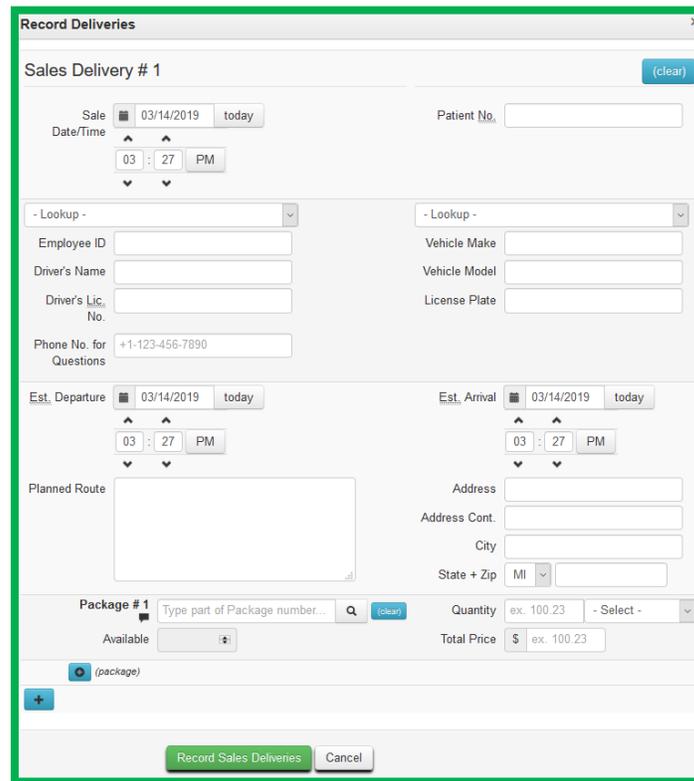


Figure 3: Recording Sales Deliveries

Each delivery to a patient should be recorded separately. Once the sales delivery is recorded, it is considered open in Metrc. As you will see below, there are two completed deliveries that cannot be edited once the “Complete” button on the far right is selected by a user. If the delivery is still open, the employee can edit, or void as needed.

Sales Deliveries													D-18-XXXXX 402-X000					
													Maryland Del					
													Record Deliveries		Edit Deliveries		View Manifest	
Delivery	Sales	Customer Type	Patient	Driver	Vehicle Info	ETD	ETA	AA	Completed	Pkg's	Total	State						
▶ 0000000011	11/13/2018 11:14 pm	Patient	P01F-3519-A659-9E41	Bruno Mars	Make: Porsche Model: 911 Lic. Plate: GRLLMN	11/13/2018 11:14 pm	11/13/2018 11:14 pm	11/13/2018 11:14 pm	11/13/2018 11:16 pm	1	\$1,111.00	Completed						
▶ 0000000006	02/27/2018 05:01 am	Patient	P-1234-567-890	Bruno Mars	Make: Lamborghini Model: Herrera Lic. Plate: GRLLAMN	02/27/2018 05:01 am	02/27/2018 06:01 am	02/27/2018 08:01 am	10/08/2018 12:45 pm	1	\$100.00	Completed						
▶ 0000000001	11/29/2017 10:50 am	Patient	P11M-3C95-2375-598D	Bruno Mars	Make: Lamborghini Model: Herrera Lic. Plate: GRLLAMN	11/29/2017 10:52 am	11/29/2017 11:50 am			1	\$75.00	Shipped	Complete	Void				

Page 1 of 1 | 20 rows per page | Viewing 1 - 3 (3 total)

Figure 4: Sales Deliveries Grid

When a sales delivery is recorded in Metrc as “Complete”, the inventory is removed from the package and marked as a delivery. Remember, you should **NOT** report a “Sale Receipt” and a “Sale Delivery” for the same transaction. This will cause inventory to be removed from the affected package twice.

50 Each accepted from Manifest # 0000001003 by
Sold 5 Each from Package on Receipt 0000000031 on 1/23/2019
Sales Return of 1 Each to Package on Receipt 0000000031 on 1/23/2019
Sold 1 Each from Package on Delivery 0000000006 on 1/28/2019

Figure 5: Packages History Example

Sales Deliveries API Impact

If a Dispensary plans to report sales deliveries through their Point-of-Sale (POS) system there are a few considerations Metric would like to note. The sales delivery manifest can only be printed within your Metric account. The Metric API will allow for the creation/reporting of sales deliveries, but Dispensaries should ensure the following.

- Confirm with your POS provider that sales deliveries are being reported into Metric as deliveries and not receipts.
- Log into Metric prior to departure and print out the Metric Sales Delivery manifest.
- Do not create both a sales deliveries in Metric manually and in your POS system separately as you will likely be recording the transaction twice.

If your POS system does not currently differentiate between sales deliveries and receipts, your sales data may be reported inaccurately. Metric provides documentation [here](#) for integrators to reference the new available endpoints for the sales section.

The new endpoints that will be available for POS systems to utilize the sales delivery section of the Metric API are outlined below.

- POST /sales/v1/deliveries
- PUT /sales/v1/deliveries
- PUT /sales/v1/deliveries/complete
- DELETE /sales/v1/delivery/{id}

External Transfers Steps for Receipt of Industrial Hemp Products

External Transfers is a two-step process which will require a user to go to the External Transfers Grid as seen in **Figure 6** to create and then complete an External Transfer. The two-step process is as follows:

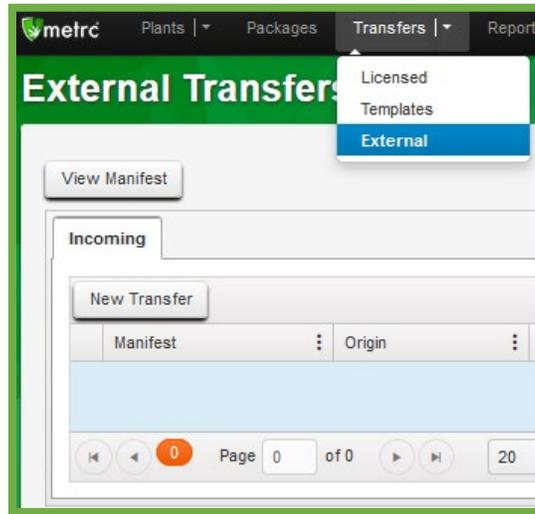


Figure 6: External Transfers Grid

Step 1: Creating an External Transfer

Once you've selected "External" under the Transfers area on the navigation bar. Create the incoming external transfer by clicking the "New Transfer" button. This will bring up a screen (as seen in **Figure 7**) where you will enter the required information to begin the process of receiving Industrial Hemp Product inventory. You should complete the fields as follows:

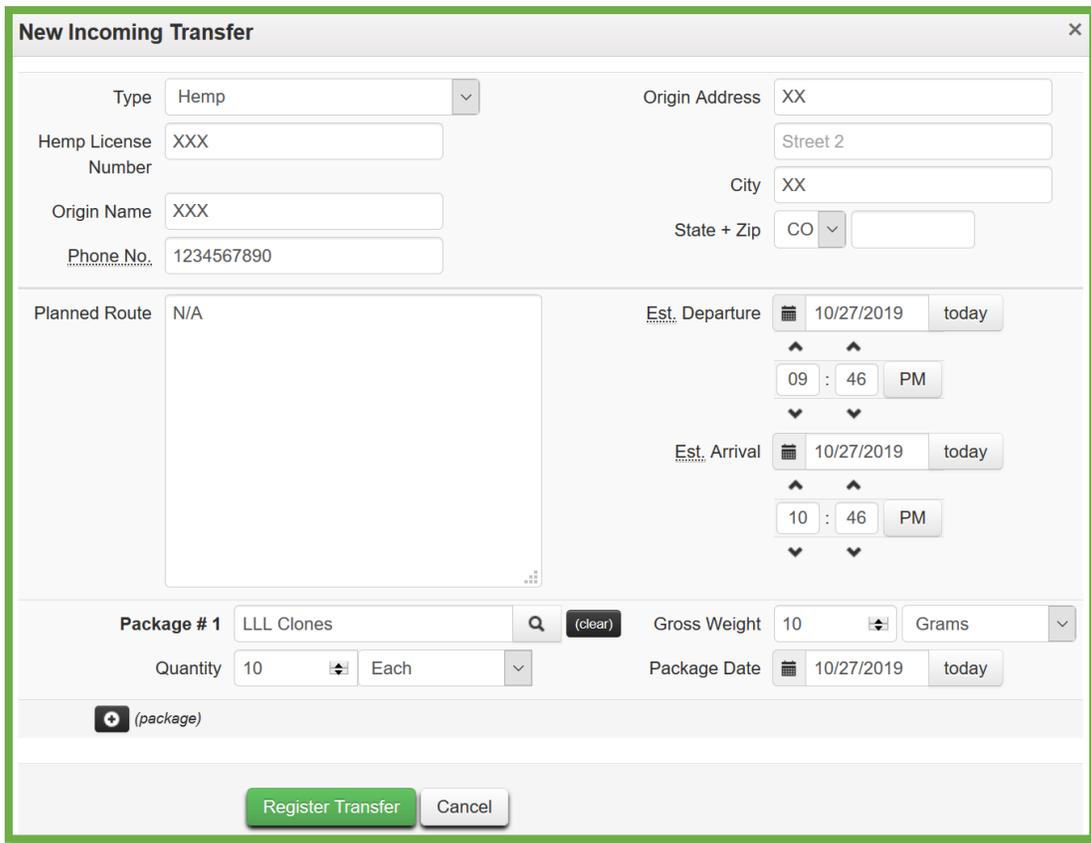
Type: Select the Industrial Hemp Product transfer option from the dropdown menu.

Industrial Hemp Product License Number: Enter the CDPHE Registration Number.

Phone Number: Enter a valid phone number. This can be designated as the Business Phone Number and not the Hemp Licensees phone number.

Planned Route: This can be stated as "Received and weighed at 405-00000".

Item Name, Quantity, and Packaged Date: These fields correspond to the specific items and quantities being transferred. If a licensee does not have items set up, they must do so before creating this type of transfer. The date packaged should be the day that you are entering the items into Metrc. The quantities should be exact and should account only for the product being received.



New Incoming Transfer

Type: Hemp

Hemp License Number: XXX

Origin Name: XXX

Phone No.: 1234567890

Origin Address: XX

Street 2:

City: XX

State + Zip: CO

Planned Route: N/A

Est. Departure: 10/27/2019 today, 09:46 PM

Est. Arrival: 10/27/2019 today, 10:46 PM

Package # 1: LLL Clones

Quantity: 10 Each

Gross Weight: 10 Grams

Package Date: 10/27/2019 today

(package)

Register Transfer Cancel

Figure 7: Incoming External Transfer

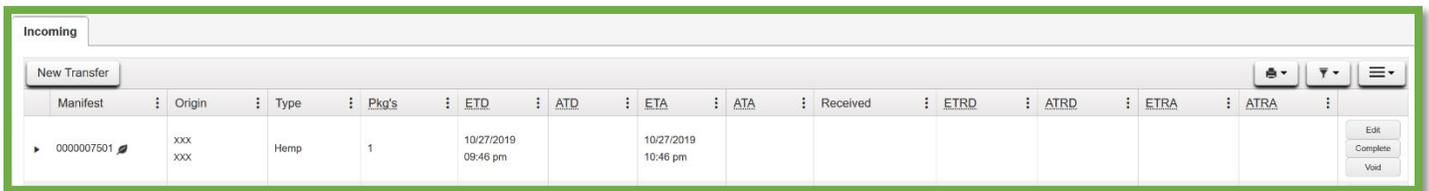
Note: Clicking “Register Transfer” does not create tagged packages in your inventory; you must complete Step 2 (below) to complete the incoming external transfer.

Step 2: Completing the External Transfer

Creating a pending incoming transfer from Step 1 does not immediately associate Metrc package tags with those items. Without completing the transfer, a licensee will not show the proper inventory and will not be in compliance with inventory reconciliation requirements.

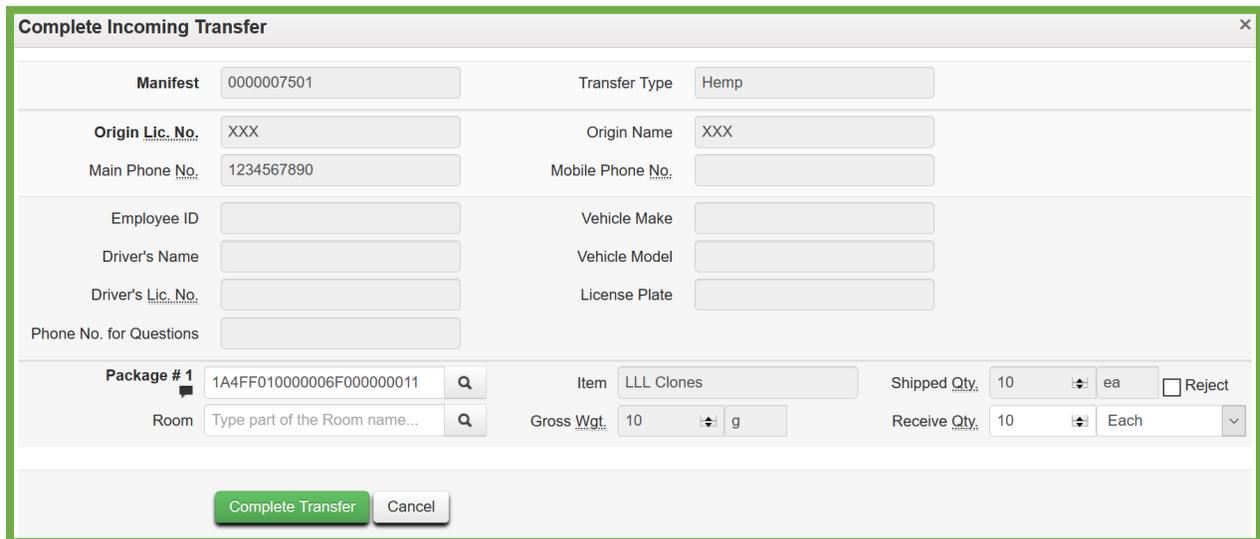
To create tagged packages, a licensee must complete the pending incoming transfer by clicking the “Complete” button to the far right and then entering the required information. The quantities entered in Step 1 will be auto-populated; you should confirm the accuracy of the quantities and assign a unique Metrc package tag to each item.

Licensees must have package tags available to complete this step. The tag assigned to the product in the system should be physically affixed to the associated product. Once the information is accurate and complete, clicking the “Complete Transfer” button will create the packages with the specified quantities in your inventory.



Manifest	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA	
▶ 0000007501	xxx xxx	Hemp	1	10/27/2019 08:46 pm		10/27/2019 10:46 pm							<input type="button" value="Edit"/> <input type="button" value="Complete"/> <input type="button" value="Void"/>

Figure 8: Pending Incoming External Transfer



Complete Incoming Transfer

Manifest: 0000007501	Transfer Type: Hemp
Origin Lic. No.: XXX	Origin Name: XXX
Main Phone No.: 1234567890	Mobile Phone No.:
Employee ID:	Vehicle Make:
Driver's Name:	Vehicle Model:
Driver's Lic. No.:	License Plate:
Phone No. for Questions:	
Package # 1: 1A4FF010000006F000000011	Item: LLL Clones
Room: Type part of the Room name...	Gross Wgt.: 10 g
	Shipped Qty.: 10 ea <input type="checkbox"/> Reject
	Receive Qty.: 10 Each

Figure 9: Completing Incoming External Transfer

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