# Metrc Support Bulletin

| **Bulletin Number**: CO_IB_02.02.2023 | **Distribution Date**: 02/02/2023 | **Effective Date**: 02/16/2023 |
|---|---|---|
| **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 2/6/2023. These enhancements include:

    I.     Updates related to transfer rejections (A portion of this enhancement was a User Group prioritized enhancement)

    II.    New directional field for transfers with layovers

    III.   New optional field entries when recording sales

    IV.   Locations for Packages (This was a MED User Group prioritized enhancement)

    V.    Sales Delivery Hub (allows for the tracking of Transporter licenses making sales deliveries as required by MED) available on the following release in March 2023

In addition to the above features, Metrc will now send automated email notifications to owners and managers of facilities when plants, harvests, and packages are newly placed on administrative hold. This notice will include the license and the tag numbers for anything placed on hold since the last email notification.
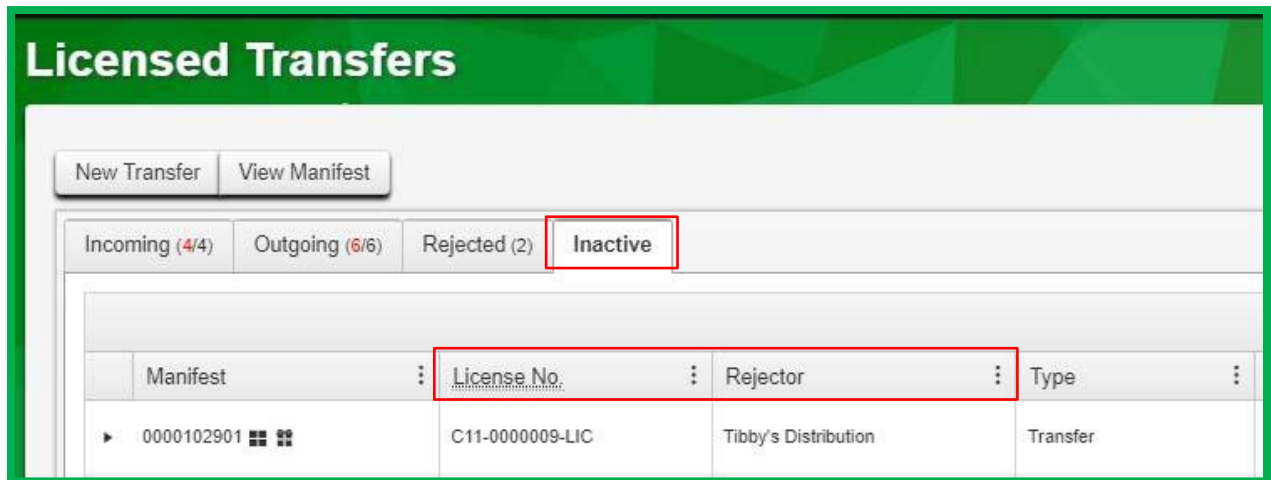
A detailed description of these enhancements is provided on the following pages.

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

# Transfer Rejection Enhancements

A new *Inactive* tab has been added to the *Licensed Transfer*s 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 the rejection. This returns the rejected packages to the origin licensee's inventory.

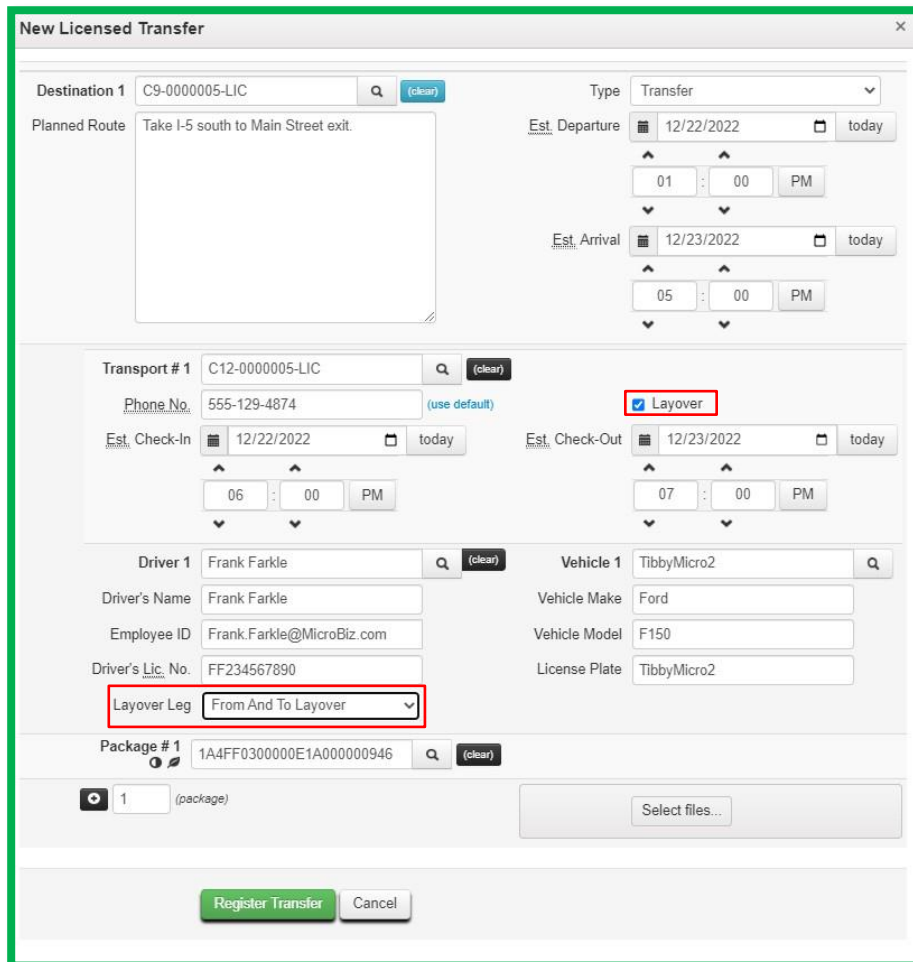In addition, the license number and license name of the rejecting business have been added to both the *Rejected* and *Inactive* tabs as shown in **Figure 1**.



**Figure 1: Licensed Transfers - Inactive Tab**

# New Layover Leg Field

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



**Figure 2: Layover Leg Field**

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

- *"From And to Layover"* - This should be selected if the same Driver will be completing the entire trip, from origin license to destination license.
- *"To Layover"* - This should be selected if the driver will be transporting the package(s) from the origin license to the layover point.
- *"From Layover"* - This should be selected if the driver will be transporting the packages from the layover point to the destination license.

**Tip:** If selecting "To Layover," the system will require you to add a "From Layover" leg. Please use the plus sign to add additional legs.

**Tip:** Layover legs must be performed on the Licensed Premises of a Regulated Marijuana Business.

**Tip:** If a driver is transporting Regulated Marijuana to multiple destinations (i.e. transporting marijuana from a single cultivation to multiple stores), the destinations are not considered to be layover legs. If a single

Information entered in the *Layover Leg* field is included on the manifest as shown in **Figure 3** below.
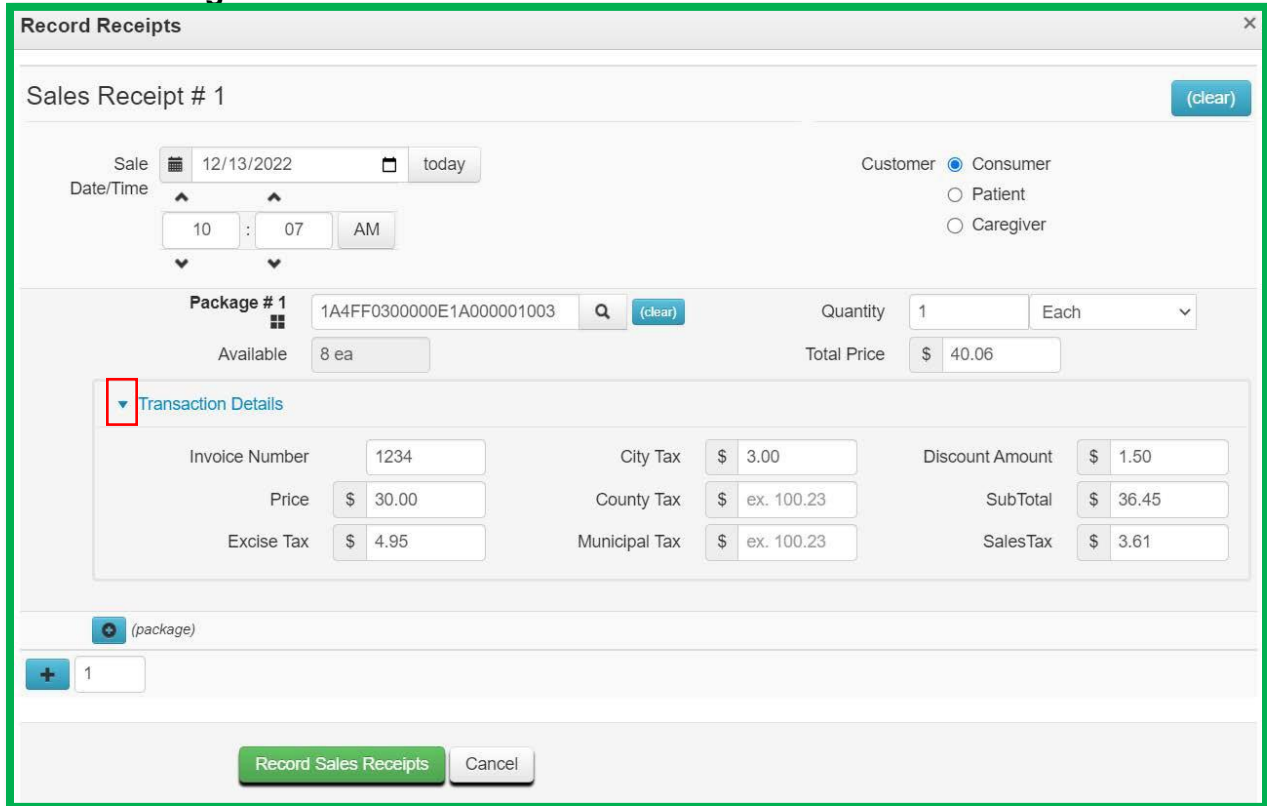
**METRC®**
**CANNABIS TRANSPORTATION MANIFEST**

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 | |
| **Route to be Traveled** Take I-5 south to Main Street exit. | | Notes: details for extenuating circumstances (e.g., road closure, flat tire, etc.) | |

| 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**

# Metrc Support Bulletin

## 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.



**Figure 4: Sales Receipt – Transaction Details (Optional)**

**Important note: Until required by the state, sales should continue to be recorded as is done currently by using the total price field, post discount and pretax. These fields, while available, are optional. Additional information will be provided if these fields become required to use. Stores using an API to report sales should check with their point-of sales provider to ensure the API is compatible with the new fields.**

Below is a list and description of the new optional sales fields:

- *Invoice*
  - o Invoice number which documents the sale to the customer, such as the invoice number from a POS system.
- *Price*
  - o Pre-tax/net selling price before all taxes
- *Excise Tax*
- *City Tax*
  - o Local business tax imposed by a local jurisdiction
- *County Tax*

  - o County tax imposed by a county, when applicable
- *Municipal Tax*
- *Discount*
  - o Use this field to record the "below the line" discount, if any, applied to the overall ticket value
  - o Enter the *Discount* as a positive value
- *Subtotal*
  - o *Price* + *Excise Tax* + *City Tax* + *County Tax* + *Municipal Tax* – Discount
  - o Do not include the *Sales Tax*
- *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.



**Figure 5: Sales Receipt – Entry in Total Price Field**

The *Transaction Details* can be viewed in the *Sales Receipt* drilldown by unhiding 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.
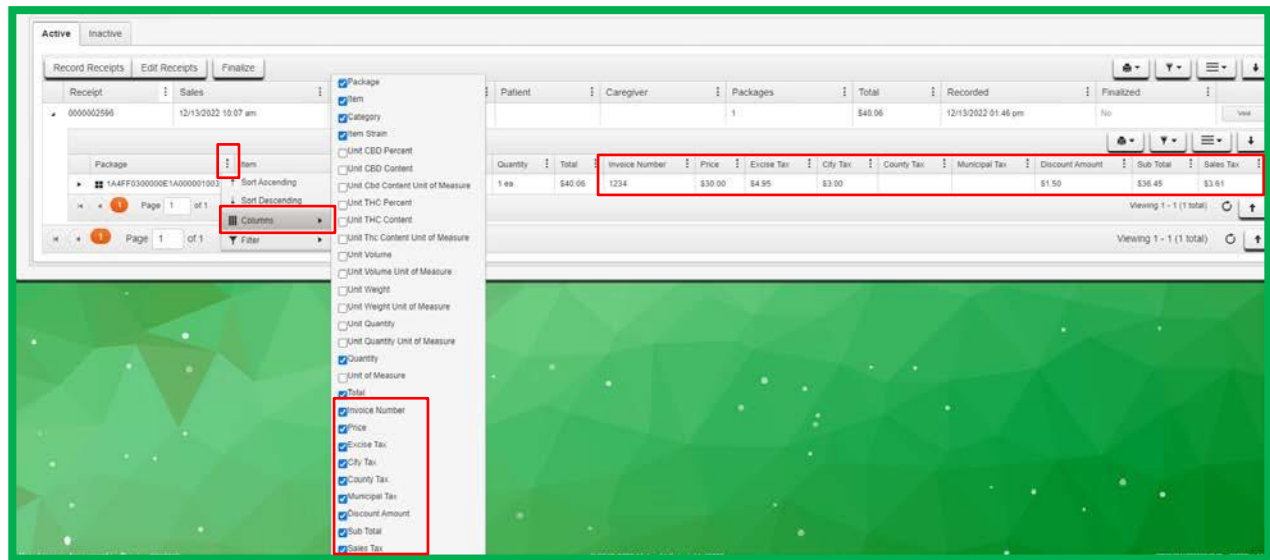


**Figure 6: Sales Receipt – Transaction Details Tab**

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*. **Please note:** The format for the CSV has changed and these columns are required even though you will not be using these fields at this time.



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

# Locations for Packages

Metrc and MED are pleased to provide guidance on the upcoming Locations functionality which was a Metrc User group identified priority and that will be rolled out Thursday 02/16/23.

Locations for Packages will allow licensees to electronically mirror physical inventory in Metrc. This functionality will allow licensees to organize and locate inventory easily, reconcile inventory faster, and isolate products that may have been contaminated or contain quality issues. Package location will be a required field moving forward. Once a location is assigned to a package, the location may be changed as the physical inventory is relocated. This functionality will be enabled in the system on 02/16/23.

Below are detailed descriptions and step by step instructions on these features described above.

# Creating Locations for Packages

Once enabled by Metrc, licensees will be able to add package locations under the Admin panel. This was an enhancement identified by the Metrc User Group and used in other jurisdictions. This will help keep Licensees compliant with MED rules by mirroring their physical and electronic inventory.
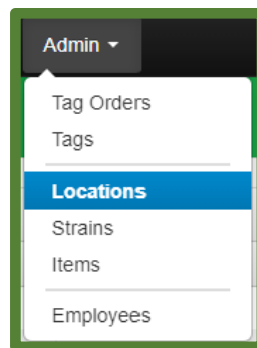


**Figure 8: Locations Section**

There will be a Locations grid under the Admin area (as shown in **Figure 8** above), new Locations can be created for Packages as shown below in **Figures 9 & 10**. Note more than one location can be created simultaneously clicking on the ➕ .
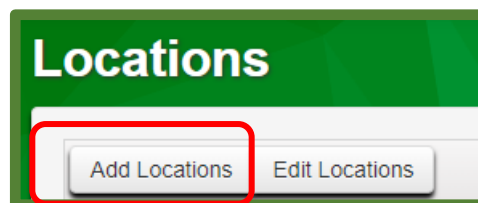


**Figure 9: Locations Dashboard**
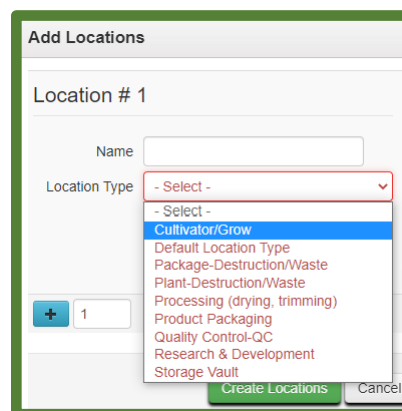


**Figure 10: Adding Locations**

**Best Practices for Managing Package Locations:**

- The name of the location(s) created by licensees should be identical or have easily identifiable similarities to the names of rooms or other locations on the licensee's Licensed Premises floorplan, previously submitted to the Division.

- Licensees are encouraged to create a location for packages that are on Administrative Hold or are potentially unsafe for consumption so that the packages can be isolated from other physical inventory.

- As physical inventory is moved or relocated, the virtual location in the licensee's Metrc account should be modified to reflect the change.

# Sales Delivery Hub

Store licenses will be required to indicate the license number responsible for the physical transportation of a delivery to a patient or consumer upon the next Metrc release in **March 2023**. If a Store license employee is completing the delivery to a patient or consumer then the Store License number should be entered in the Transporter Facility field. If a Transporter License is making the delivery on behalf of the Store license, the Transporter License should be entered in the Transporter Facility field as shown in **Figure 13**. Once the sales delivery is created by the Store license, the license making the delivery will use the new Sales Delivery Hub to record the acceptance of the delivery, the departure from the Store, the arrival at the destination, and the verification of ID and payment.

Once the delivery is completed, the License performing the delivery will mark it as complete in the sales delivery hub. The License performing the delivery also has the ability to record if a delivery was rejected.

To begin the process, the Store License must navigate to the Sales Delivery screen by selecting the Deliveries option under the Sales menu on the top navigational bar. This step is show below in **Figure 11**.
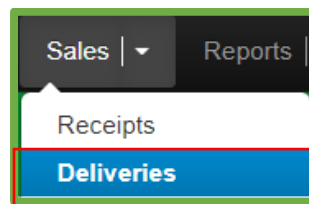


**Figure 11: Sales Menu with Deliveries Option**

**Please Note:** If you do not see this option, you will need to be granted the permission by your License Admin under the employee admin menu.

Once on the Sales Deliveries screen, the user will select the "Record Deliveries" button to begin the process of creating the Sales Delivery. This step is shown below in **Figure 12**.
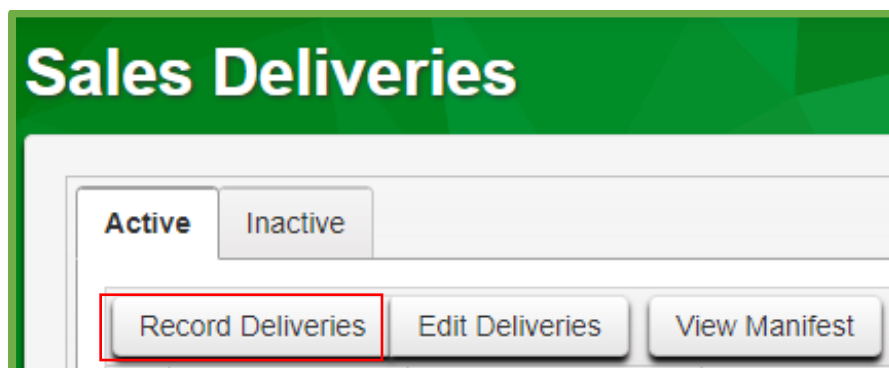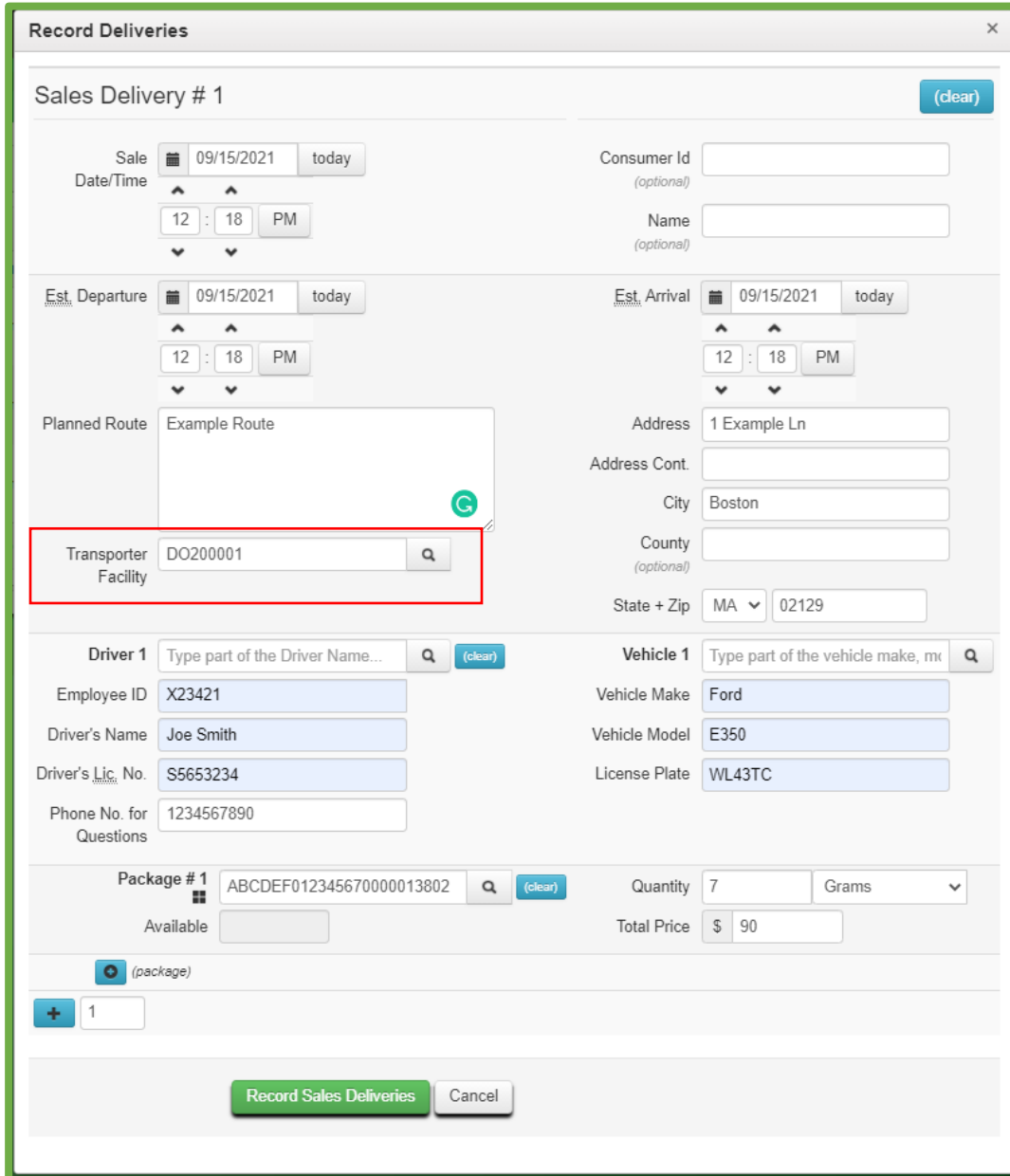


**Figure 12: Record Deliveries Button**

This button will trigger the action window where the user will enter the details of the Sales Delivery. New with this functionality is the ability to indicate a different license that will be physically delivering the sale. This step is demonstrated for drivers below in **Figure 13.**



**Figure 13: Create Sales Delivery Action Window**

Once the information is entered, the user will select the "Record Sales Delivery" button to complete the sales delivery creation process.

Once the delivery is created, it will appear in the new Sales Delivery Hub of the license entered for the Transporter Facility by the Store Facility.

To navigate to the Sales Delivery Hub, the licensee making the physical delivery will select the option under the Sales menu on the top navigational bar. This step is shown below in **Figure 14**.



**Figure 14: Navigate to Delivery Hub**

Once on the page, the license making the delivery will see all the deliveries where their license was listed as the transporter. Note that the license listed in the Transporter Facility field will have the ability to edit all transporter details (drivers, vehicles, etc.) but will not be able to edit the content of the delivery.

Once the licensee making the delivery has taken possession of the marijuana, they will mark it by using the "Accept" button for the delivery. This step is shown below in **Figure 5**.
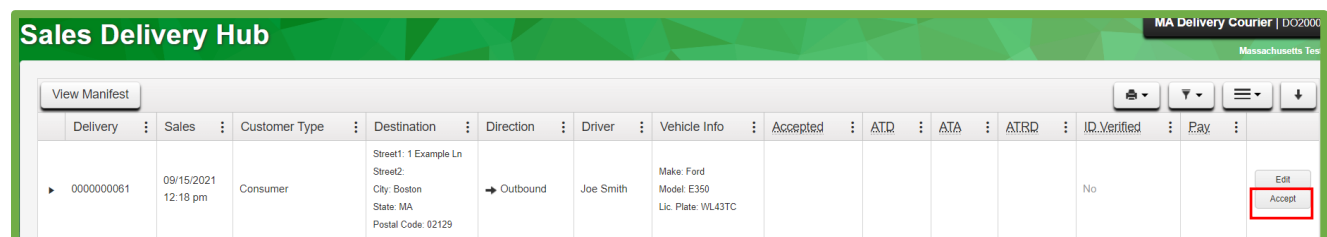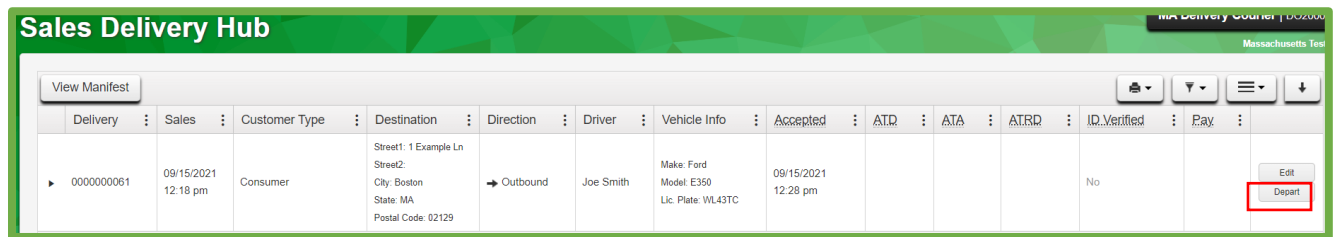


**Figure 15: Accept Sales Delivery**
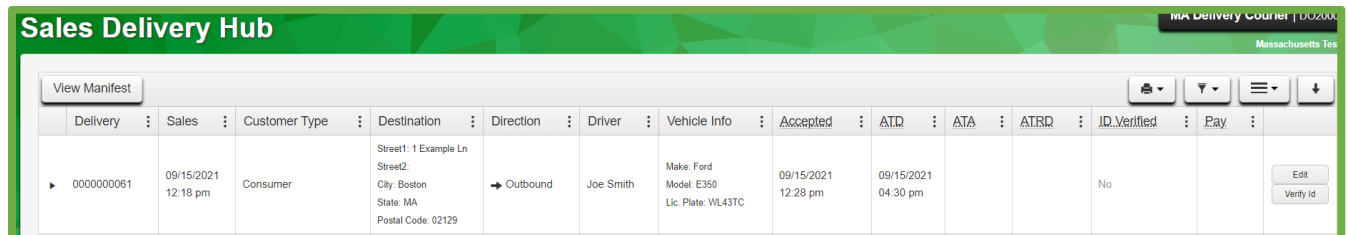
After accepting the delivery in Metrc, the licensee making the delivery will depart the facility and denote that using the "Depart" button. This step is shown below in **Figure 16**.
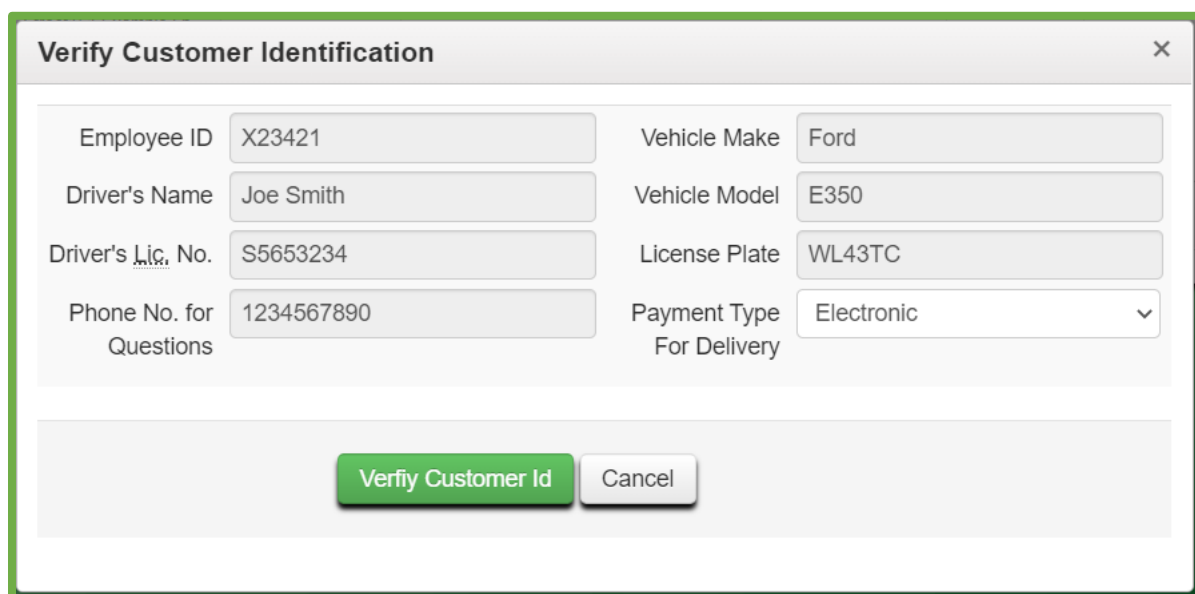


**Figure 16: Mark Departure from Retailer Facility**

When the Licensee/Transporter employee completes the delivery, they should verify the recipient's ID. Once complete, the user will use the "Verify ID" button. This step is shown below in **Figure 17**.
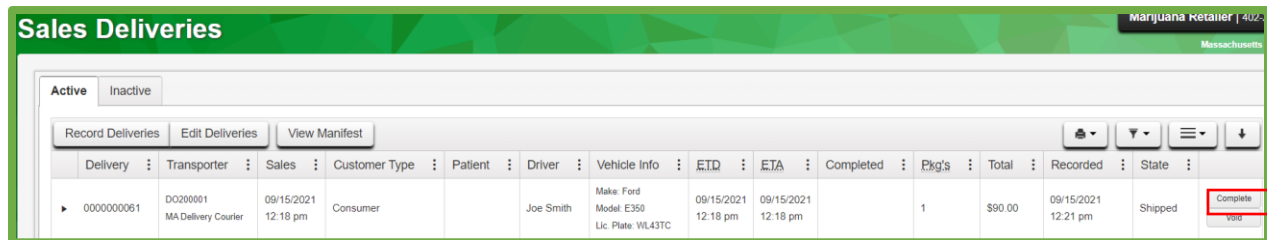


**Figure 17: Verify ID of Recipient**

The "Verify ID" button will trigger an action window where the Licensee/Transporter employee will indicate if the Payment Type is "Cash" or "Electronic". This step is shown below in **Figure 8**.

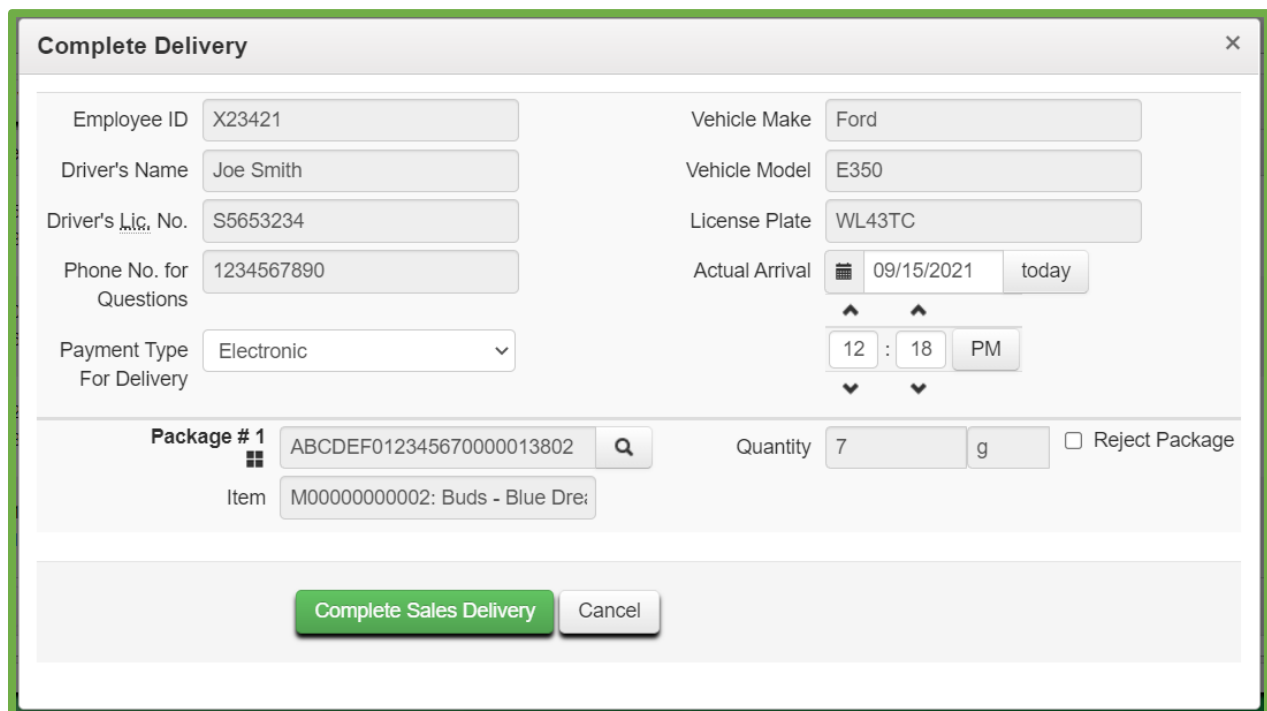

**Figure 18: Verify ID Action Window**

Once the licensee completes this process, the Store license will now be able to complete the sales delivery under their license by using the "Complete" button. This step is shown below in **Figure 19**.



**Figure 19: Complete Sales Delivery**

This button will trigger an action window where the Store license will confirm the completion of the sales delivery. Once completed, this delivery will be finalized and moved to the "Inactive" tab. This step is shown below in **Figure 20**.



**Figure 20: Complete Sales Delivery Action Window**

**Please Note:** If the sales delivery was unable to be completed, the Store license will use the "Reject Package" checkbox and indicate the reason for the rejection. This process is demonstrated below in **Figure 21**.

**Figure 21: Rejected Sales Delivery Action Window**

# Metrc Resources

On the far right of the long black navigational toolbar, there is a Support dropdown as shown in **Figure 22** below. This dropdown can be utilized to reference the Metrc Manual/User Guide, Colorado Supplemental Guide, Industry Reports Guide, info to contact Metrc Support, and sign up for training. These tools can be used anytime for no additional charges as long as you are entered within an active licensed business.



**Figure 22: Support Section**

We also have additional resources such as our Partner Page, Metrc Learn and the Metrc Knowledge Center.

The Metrc Colorado Partner Page has information regarding our YouTube videos, the list of Colorado's validated integrators, quick links to the Badge Inquiry Form and the bulletin archive for a list of all Metrc bulletins.

Metrc Learn is an interactive learning management system, that allows users to complete all training on demand including Advanced trainings by facility type and modular training for multiple areas of Metrc. The system will teach specific functionality and processes, allow the user to demonstrate the functionality being discussed. Completed training information will even be able to be exported.

The Metrc Knowledge Center is a portal that provides on-demand access to various resource materials including past bulletins and helpful links to users. This center is designed to be a supplemental resource to Metrc Support, providing options for self-assistance with documentation, a live-chat feature, and the ability to submit support tickets directly to the Support team.

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