

Bulletin Number: MO_IB_19	Distribution Date: 1/24/2023	Effective Date: Ongoing
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 1/24/2023. 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

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.

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**.

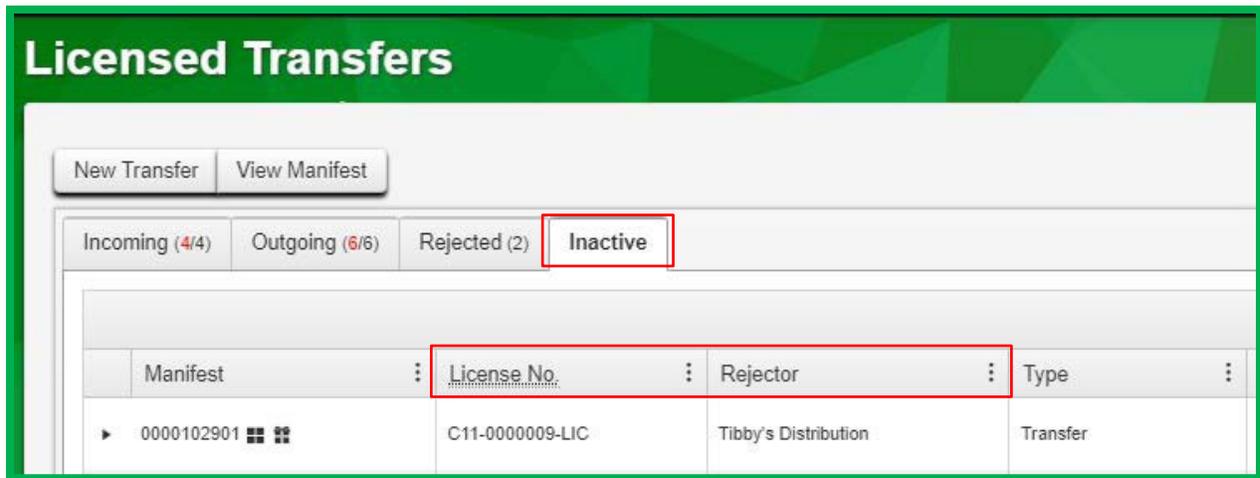
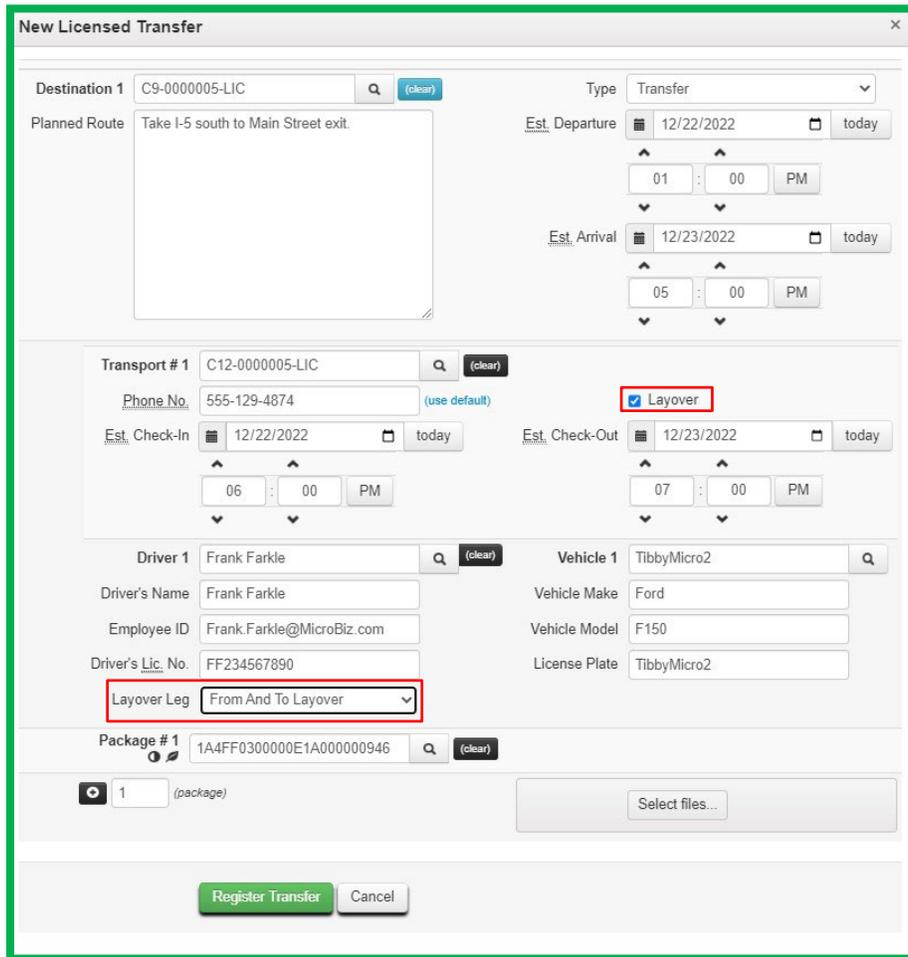


Figure 1: Licensed Transfers - Inactive Tab

New Layover Leg Field

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



The screenshot shows the 'New Licensed Transfer' form. The 'Layover' checkbox is checked and highlighted with a red box. The 'Layover Leg' dropdown menu is also highlighted with a red box and currently shows 'From And To Layover'. Other fields include Destination 1 (C9-0000005-LIC), Type (Transfer), 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), Driver's Name (Frank Farkle), Employee ID (Frank.Farkle@MicroBiz.com), Driver's Lic. No. (FF234567890), Vehicle 1 (TibbyMicro2), Vehicle Make (Ford), Vehicle Model (F150), License Plate (TibbyMicro2), and Package # 1 (1A4FF030000E1A000000946). Buttons for 'Register Transfer' and 'Cancel' are at the bottom.

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*

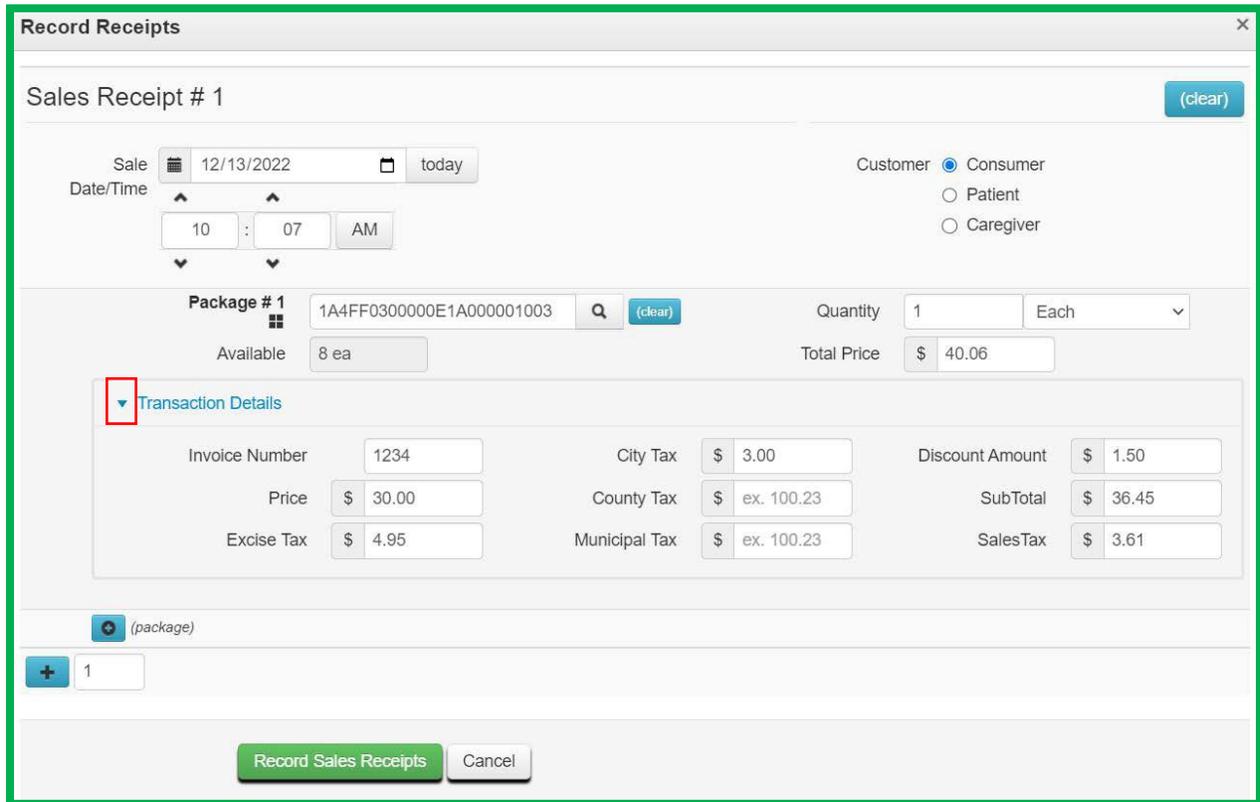
The *Layover Leg* field is also included on the manifest as shown in **Figure 3** below.

 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	
		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 Fields for Sales

Several new fields are 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 the 'Record Receipts' window. At the top, it says 'Sales Receipt # 1' with a '(clear)' button. Below this, there are fields for 'Sale Date/Time' (12/13/2022, today), 'Customer' (Consumer, Patient, Caregiver), 'Package # 1' (1A4FF0300000E1A000001003), 'Quantity' (1, Each), and 'Total Price' (\$ 40.06). A section titled 'Transaction Details' is expanded, showing fields for Invoice Number (1234), Price (\$ 30.00), Excise Tax (\$ 4.95), City Tax (\$ 3.00), County Tax (\$ ex. 100.23), Municipal Tax (\$ ex. 100.23), Discount Amount (\$ 1.50), SubTotal (\$ 36.45), and SalesTax (\$ 3.61). A red box highlights the expand button for 'Transaction Details'.

Figure 4: Sales Receipt – Transaction Details (Optional)

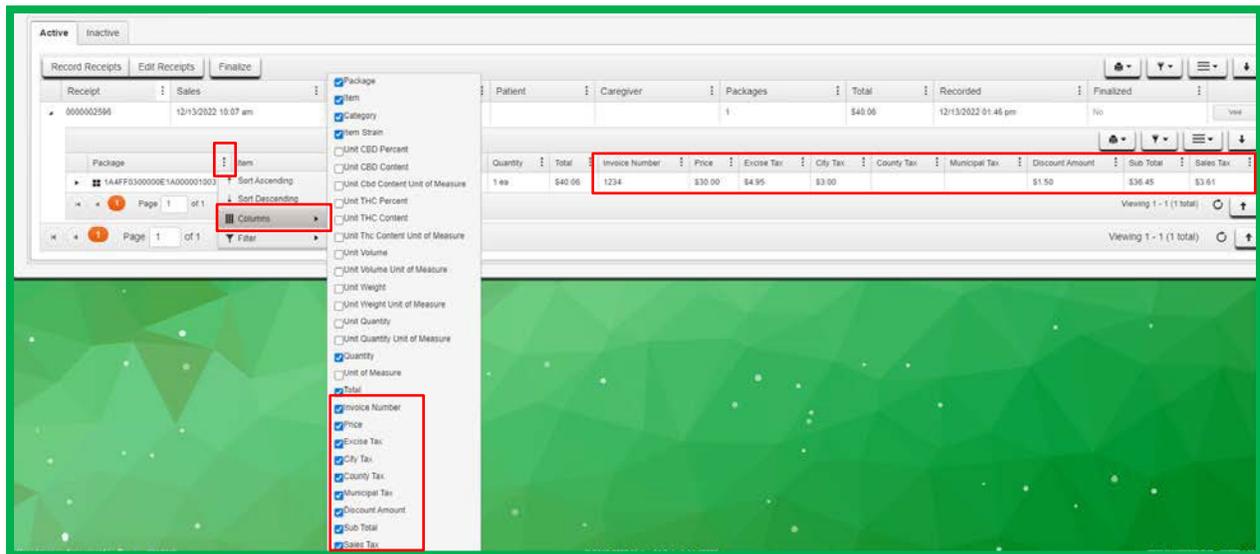
Important note:

Licensees should continue to record sales as is in the *Total Price* field, which is the post discount and pretax price. The Department expects licensees to record any other transaction details that also apply to their location, such as, city or county taxes. Additional tax transaction details should not be included in the *Total Price* field.

Below is a list of the new fields, along with information on their purpose.

- *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*
- *City Tax*
- *County Tax*
 - Local business tax imposed by a local jurisdiction
- *County Tax*
 - County tax imposed by a county, when applicable
- *Municipal Tax*
 - Municipal tax imposed by the municipality, when applicable
- *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*
 - Missouri sales tax, when applicable

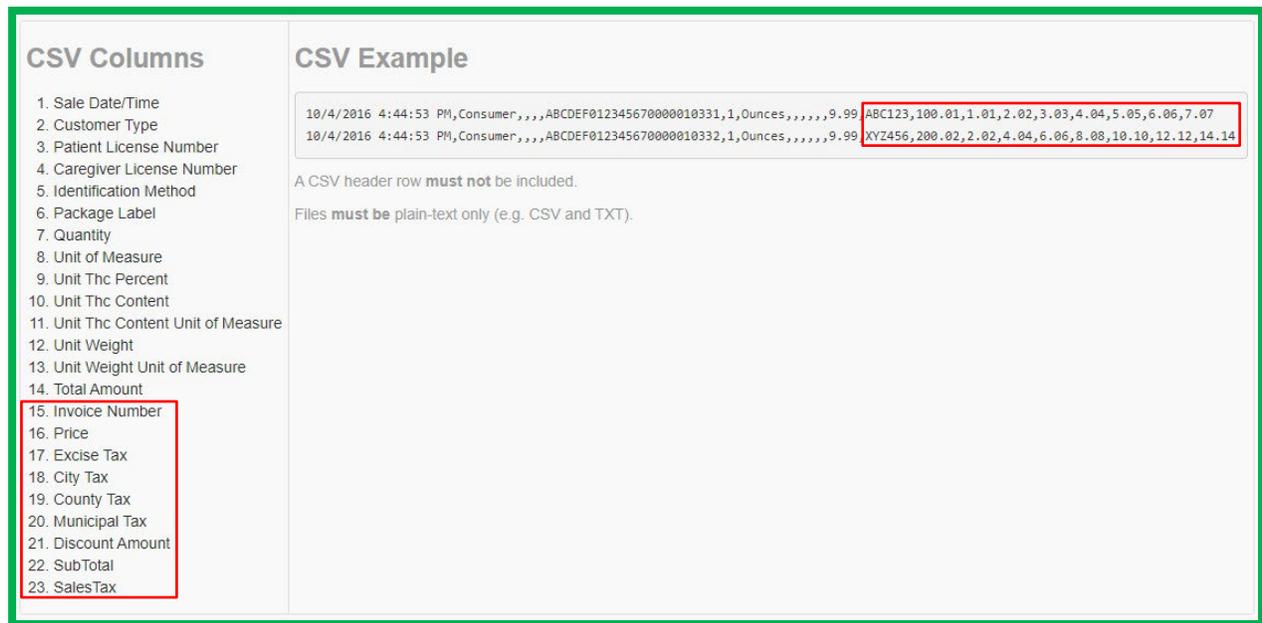


The *Transaction Details* can be viewed in the *Sales Receipt* drilldown by unchecking the columns as shown in **Figure 5** below. To unhide the columns, click on the three vertical dots on any column in the drilldown and select the *Columns* option from the menu. Mark the checkboxes for the columns you wish to display.

Figure 5: Sales Receipt – Transaction Details Tab

The new 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 6** 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.



CSV Columns

1. Sale Date/Time
2. Customer Type
3. Patient License Number
4. Caregiver License Number
5. Identification Method
6. Package Label
7. Quantity
8. Unit of Measure
9. Unit Thc Percent
10. Unit Thc Content
11. Unit Thc Content Unit of Measure
12. Unit Weight
13. Unit Weight Unit of Measure
14. Total Amount
15. Invoice Number
16. Price
17. Excise Tax
18. City Tax
19. County Tax
20. Municipal Tax
21. Discount Amount
22. SubTotal
23. SalesTax

CSV Example

```
10/4/2016 4:44:53 PM,Consumer,,,,,ABCDEF012345670000010331,1,Ounces,,,,,9.99,ABC123,100.01,1.01,2.02,3.03,4.04,5.05,6.06,7.07
10/4/2016 4:44:53 PM,Consumer,,,,,ABCDEF012345670000010332,1,Ounces,,,,,9.99,XYZ456,200.02,2.02,4.04,6.06,8.08,10.10,12.12,14.14
```

A CSV header row **must not** be included.
Files **must be** plain-text only (e.g. CSV and TXT).

Figure 6: On-Page CSV Guide - New Sales Receipt

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