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|---|---------------------------------------|-------------------------------------|
| <b>Bulletin Number:</b><br>OK_IB_20_1.24.23                       | <b>Distribution Date:</b>             | <b>Effective Date:</b><br>1/24/2023 |
| <b>Contact Point:</b> Metrc® Support                              | <b>Subject:</b> New Features in Metrc |                                     |
| <b>Reason:</b> 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

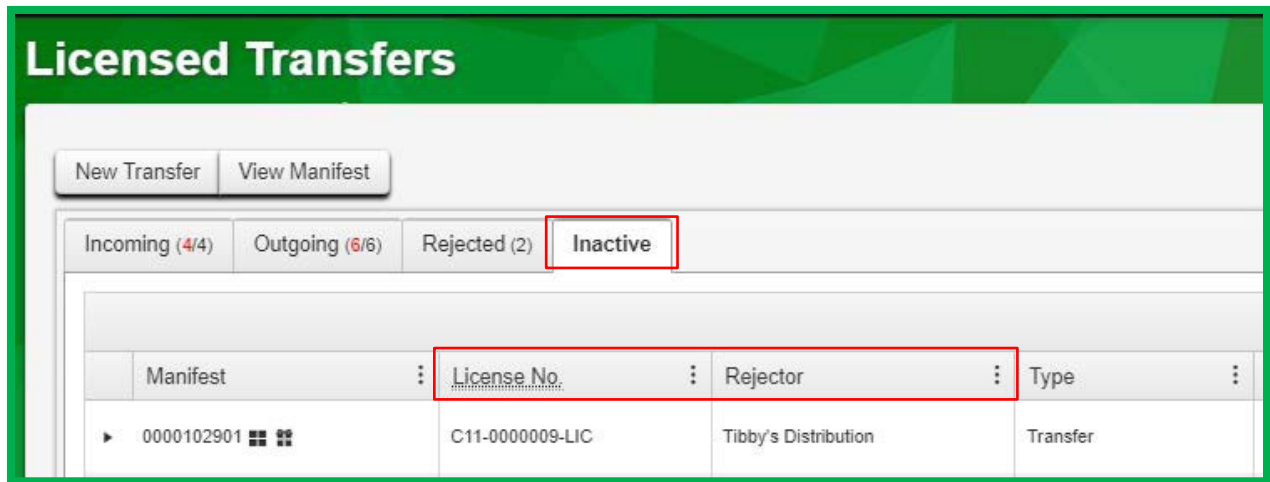
In addition to the above features, Metrc will now send automated email notifications to owners and managers of facilities when plants, harvests, and packages are newly placed on administrative hold. This notice will include the license and the tag numbers for anything placed on hold since the last email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

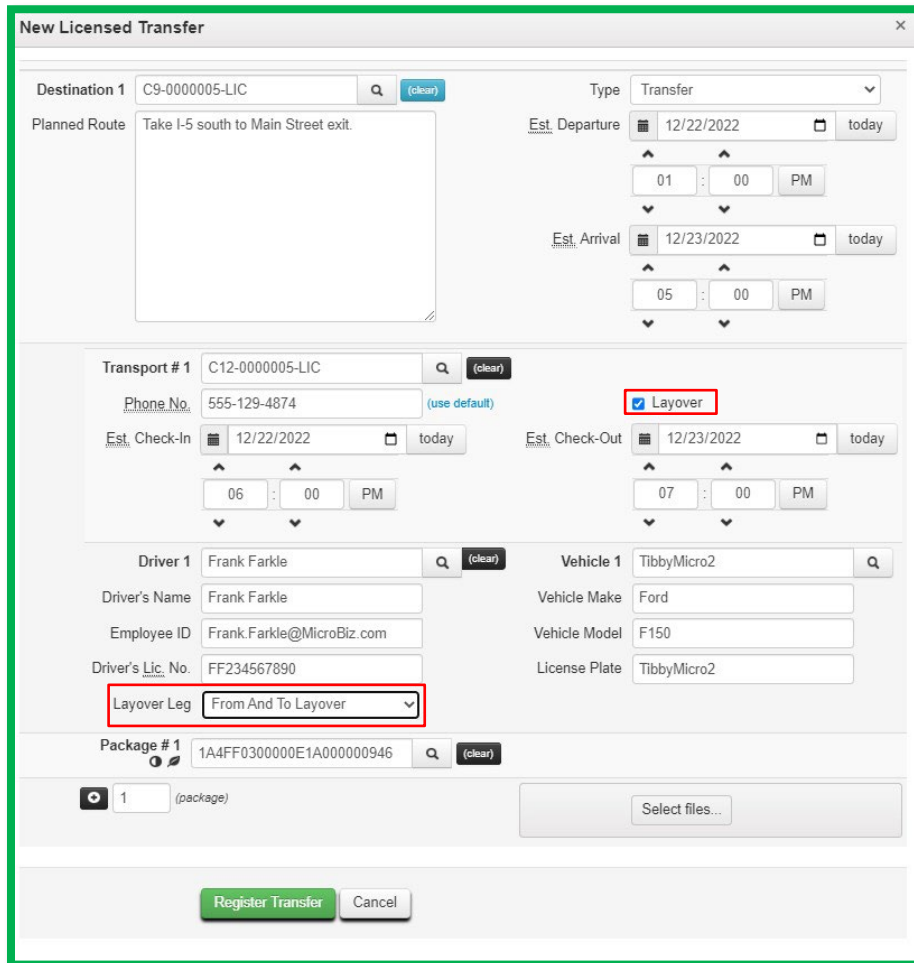
In addition, the license number and license name of the rejecting business have been added to both the *Rejected* and *Inactive* tabs as shown in **Figure 1**.



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

## **New Layover Leg Field**

A new *Layover Leg* field has been added to the *New/Edit Licensed Transfer* modals 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* – Same Transporter is performing both legs of the layover
- *From Layover* – Transporter is only completing the final leg from the layover location to the receiving license
- *To Layover* – Transporter is only completing the initial leg to the layover location

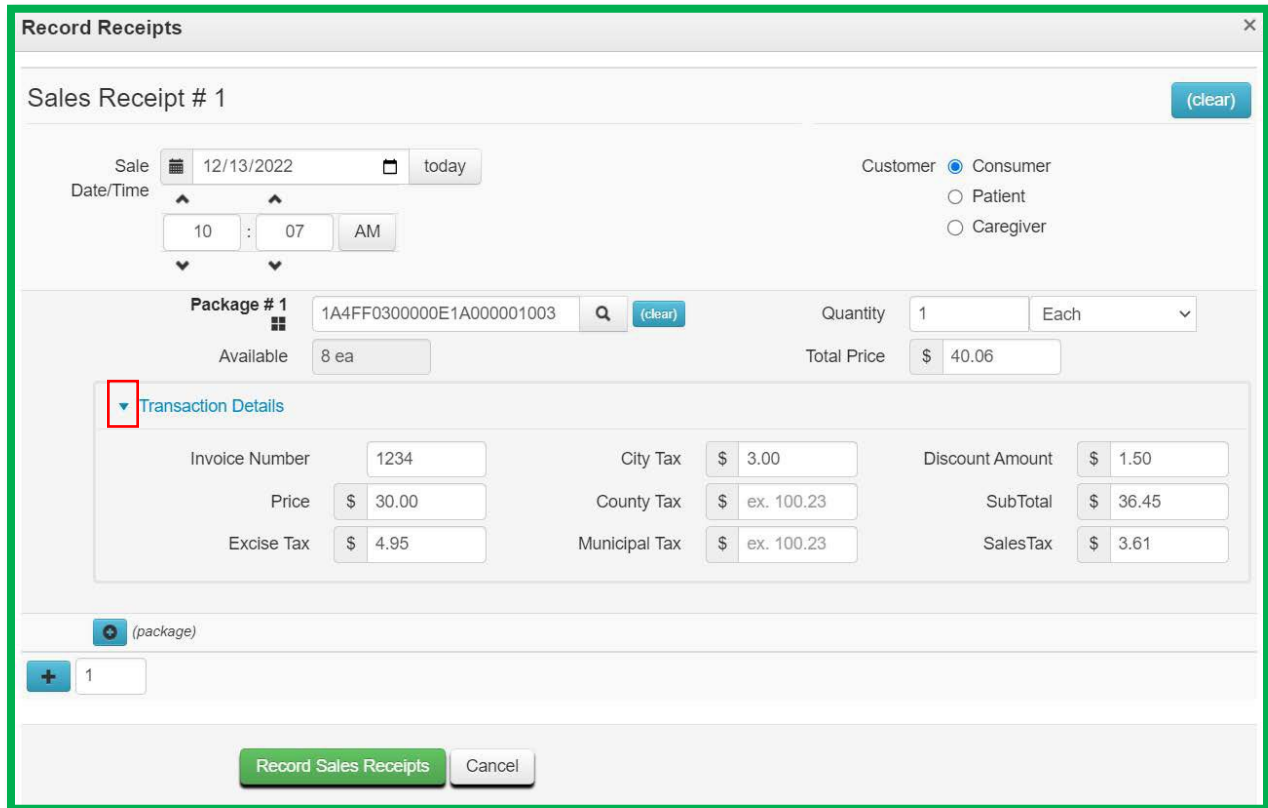
The *Layover Leg* field is also included on the manifest as shown in **Figure 3** below.

|  <b>METRC®</b><br><b>CANNABIS TRANSPORTATION MANIFEST</b>  |  |   |                         |
|---|--|---|-------------------------|
| 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. |  |   |                         |
| <b>Manifest No.</b>   | <b>0000117301</b>  | <b>Date Created</b>   | 12/22/2022 2:56 PM      |
| <b>Originating Entity</b>   | Tibby's Micro Biz  | <b>For Agency Use Only</b>  |                         |
| <b>Originating License Number</b>   | C12-0000005-LIC  |   |                         |
| <b>Address of Originating Entity</b>  | 9451 Markfield Way<br>Unit 5<br>Sacramento, California 95829<br>County: Sacramento County<br>APN: 81793947277277 |   |                         |
| <b>Phone No. of Originating Entity</b>  | 555-129-4874   |   |                         |
| <b>1. Destination</b>   | Tibby's Retail   | <b>Destination Phone No.</b>  | 555-129-4874            |
| <b>Destination License Number</b>   | C9-0000005-LIC   | <b>Date and Approx. Time of Departure</b>   | 12/22/2022 1:00 PM      |
| <b>Address of Destination</b>   | 9453 Markfield Way<br>Unit 5<br>Sacramento, California 95829<br>County: Sacramento County                        | <b>Date and Approx. Time of Arrival</b>   | 12/23/2022 5:00 PM      |
|   |  | <b>Date/Time Received</b>   |                         |
|   |  | <b>Notes:</b> details for extenuating circumstances (e.g., road closure, flat tire, etc.) |                         |
| <b>Route to be Traveled</b><br>Take I-5 south to Main Street exit.  |  |   |                         |
| <b>1. Outbound Transporter</b>  | Tibby's Micro Biz  | <b>Layover Schedule</b>   |                         |
| <b>Transporter License Number</b>   | C12-0000005-LIC  | <b>Date and Approx. Time of Check-In</b>  | 12/22/2022 6:00 PM      |
| <b>Address of Transporter</b>   | 9451 Markfield Way<br>Unit 5<br>Sacramento, California 95829<br>County: Sacramento County<br>APN: 81793947277277 | <b>Date and Approx. Time of Check-Out</b>   | 12/23/2022 6:57 AM      |
|   |  |   |                         |
| <b>Contact Phone No. for Inquiries:</b> 555-129-4874  |  |   |                         |
| <b>Name of Person Transporting</b>  | Frank Farkle   | <b>Employee ID of Driver</b>  | Frank.Farkle@MicroBiz.c |
| <b>State Driver's License No.</b>   | FF234567890  | <b>Signature of Person Transporting</b>   |                         |
| <b>Make, Model, License Plate No.</b>   | Ford F150 TibbyMicro2  | <b>Leg of Layover Trip</b>  | From And To Layover     |
| <b>1. Package   Shipped</b>   | <b>Production Batch No.</b>  | <b>Item Name</b>  | <b>Quantity</b>         |
| 1A4FF0300000E1A000001017<br>Lab Test: NotRequired   |  | Skywalker Seed (Each)<br>(Seeds (each))   | Shp. 10.0000 ea         |
| <b>Item Details</b>   | 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 the 'Record Receipts' window with the following details:

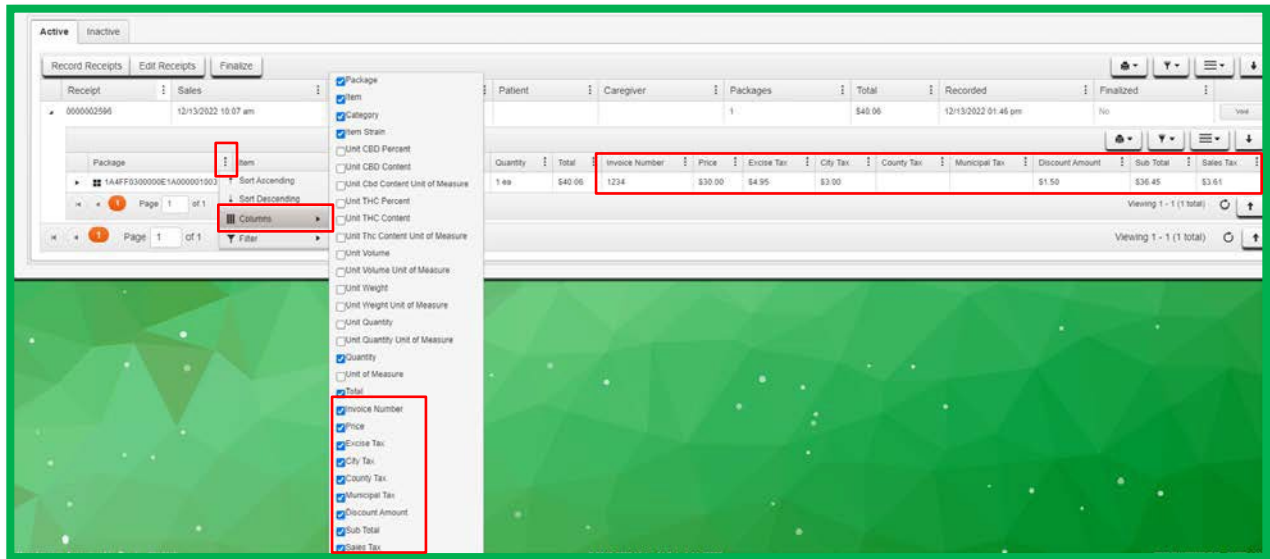
- Sales Receipt # 1** (clear button)
- Sale Date/Time:** 12/13/2022 (today), 10:07 AM
- Customer:** Consumer (selected), Patient, Caregiver
- Package # 1:** 1A4FF0300000E1A000001003 (clear button), Quantity: 1, Each
- Available:** 8 ea, **Total Price:** \$ 40.06
- Transaction Details (Expanded):**
  - 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
  - SalesTax: \$ 3.61
- Buttons:** Record Sales Receipts, Cancel

**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. OMMA Licensees are to review Oklahoma’s statutes and rules to determine compliant reporting and record-keeping requirements.**

The *Transaction Details* can be viewed in the *Sales Receipt* drilldown by un hiding 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 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 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  | CSV Example   |
|--|---|
| <ol style="list-style-type: none"> <li>1. Sale Date/Time</li> <li>2. Customer Type</li> <li>3. Patient License Number</li> <li>4. Caregiver License Number</li> <li>5. Identification Method</li> <li>6. Package Label</li> <li>7. Quantity</li> <li>8. Unit of Measure</li> <li>9. Unit Thc Percent</li> <li>10. Unit Thc Content</li> <li>11. Unit Thc Content Unit of Measure</li> <li>12. Unit Weight</li> <li>13. Unit Weight Unit of Measure</li> <li>14. Total Amount</li> <li>15. Invoice Number</li> <li>16. Price</li> <li>17. Excise Tax</li> <li>18. City Tax</li> <li>19. County Tax</li> <li>20. Municipal Tax</li> <li>21. Discount Amount</li> <li>22. SubTotal</li> <li>23. SalesTax</li> </ol> | <pre>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</pre> <p>A CSV header row <b>must not</b> be included.<br/>Files <b>must be</b> plain-text only (e.g. CSV and TXT).</p> |

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

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