

<b>Bulletin Number:</b> SD_IB_004	<b>Distribution Date:</b>	<b>Effective Date:</b> 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

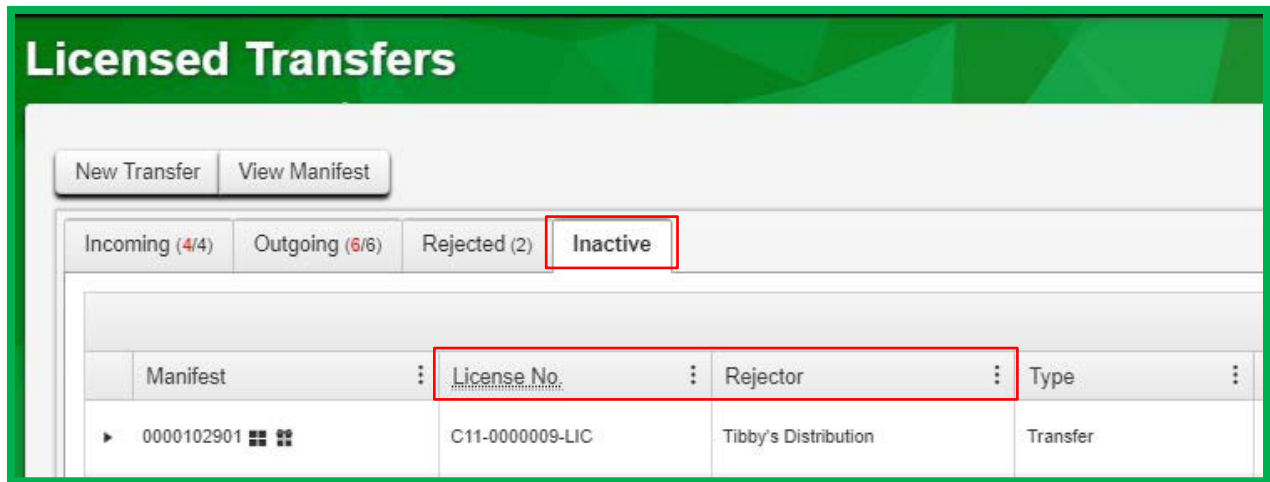
In addition to the above features, Metrc will now send automated email notifications to owners and managers of facilities when plants, harvests, and packages are newly placed on administrative hold. This notice will include the license and the tag numbers for anything placed on hold since the last email 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* grid as shown in **Figure 1** below. Rejected transfers move from the *Rejected* tab to the *Inactive* tab after the origin license processes and accepts in the rejection. This returns the rejected packages to the origin license's inventory.

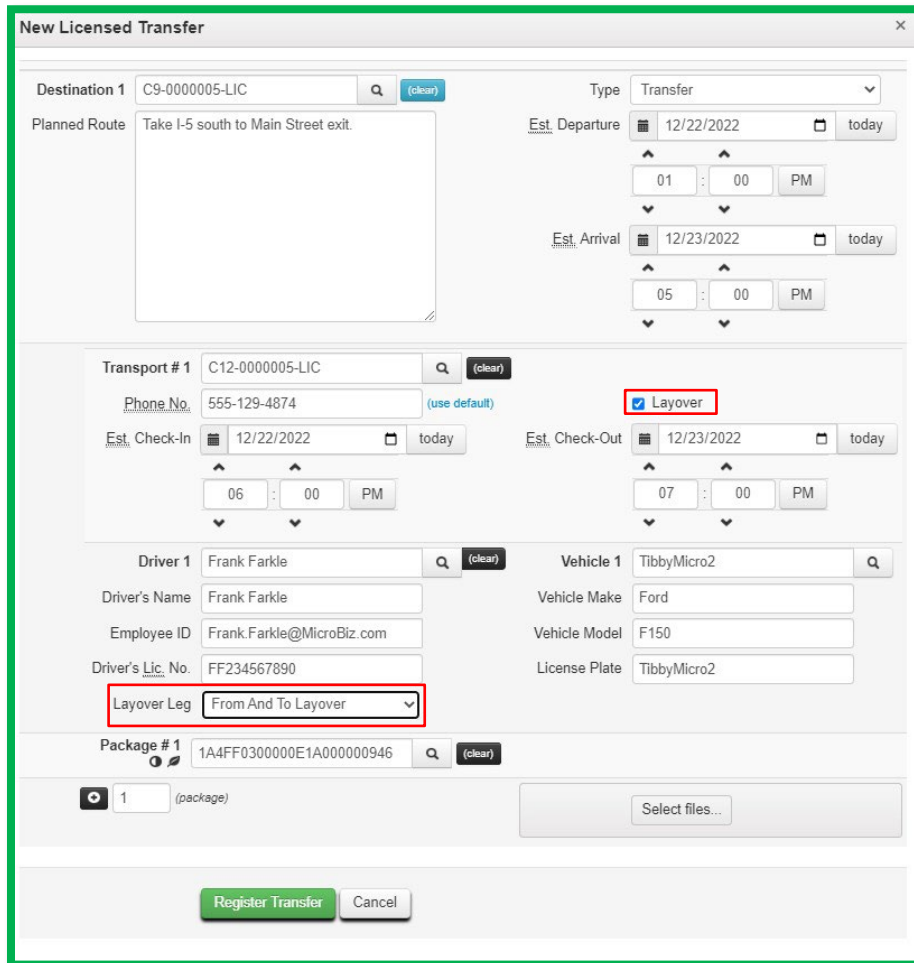
In addition, the license number and license name of the rejecting business have been added to both the *Rejected* and *Inactive* tabs as shown in **Figure 1**.



**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 shows the selected option 'From And To Layover'.


Destination 1	C9-0000005-LIC	Type	Transfer
Planned Route	Take I-5 south to Main Street exit.	Est. Departure	12/22/2022 01:00 PM
Transport # 1	C12-0000005-LIC	Est. Arrival	12/23/2022 05:00 PM
Phone No.	555-129-4874	<input checked="" type="checkbox"/> Layover	
Est. Check-In	12/22/2022 06:00 PM	Est. Check-Out	12/23/2022 07:00 PM
Driver 1	Frank Farkle	Vehicle 1	TibbyMicro2
Driver's Name	Frank Farkle	Vehicle Make	Ford
Employee ID	Frank.Farkle@MicroBiz.com	Vehicle Model	F150
Driver's Lic. No.	FF234567890	License Plate	TibbyMicro2
Layover Leg	From And To Layover		
Package # 1	1A4FF030000E1A00000946		

**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*

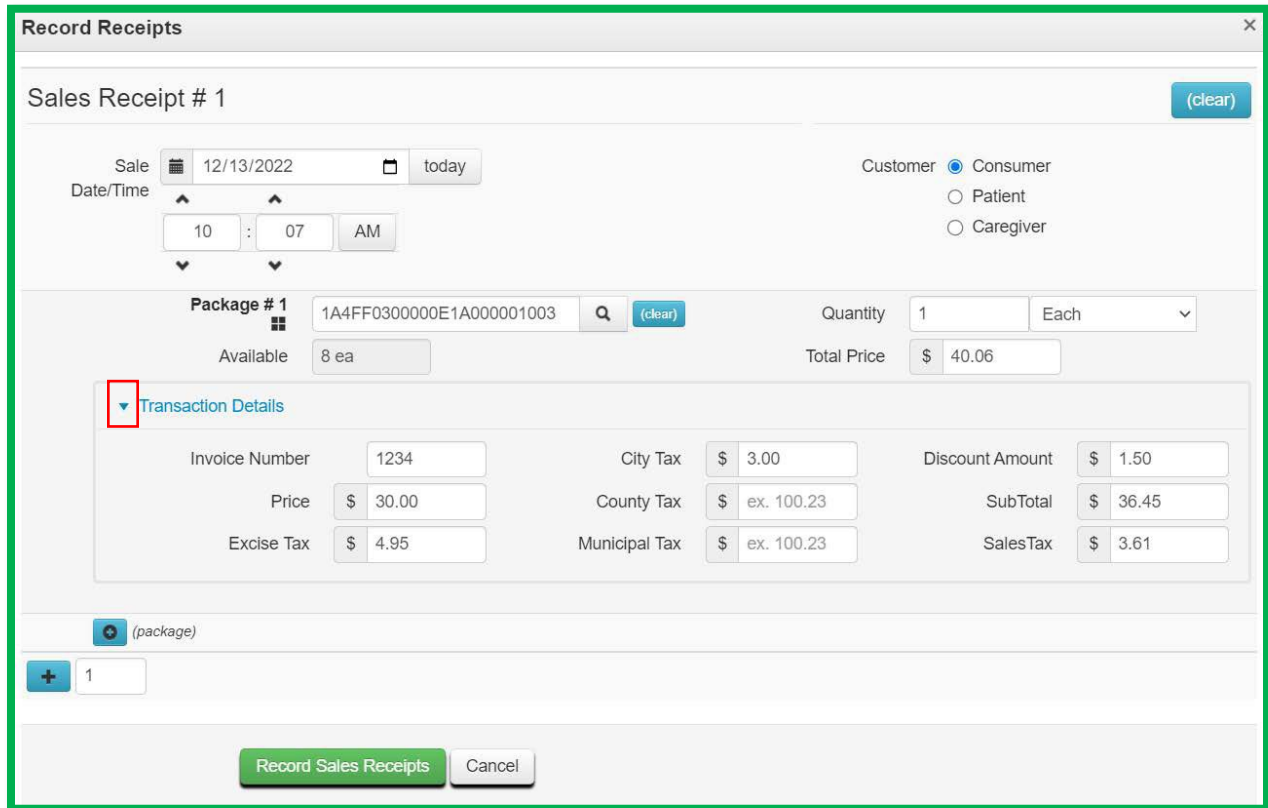
The *Layover Leg* field is also included on the manifest as shown in **Figure 3** below.

 <b>METRC®</b> <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 Unit 5 Sacramento, California 95829 County: Sacramento County 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 Unit 5 Sacramento, California 95829 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> 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 Unit 5 Sacramento, California 95829 County: Sacramento County 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 Lab Test: NotRequired		Skywalker Seed (Each) (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:

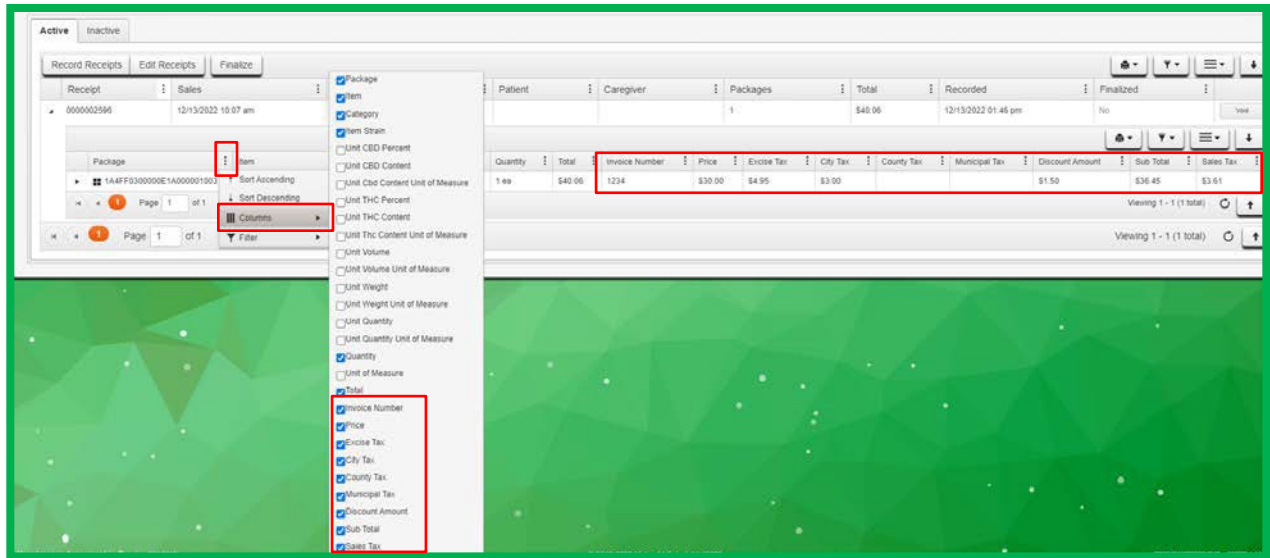
- Sales Receipt # 1** (clear button)
- Sale Date/Time:** 12/13/2022 (today), 10:07 AM
- Customer:** Consumer (selected), Patient, Caregiver
- Package # 1:** 1A4FF0300000E1A000001003 (clear), Quantity: 1 Each, Total Price: \$ 40.06
- Available:** 8 ea
- Transaction Details (expanded):**
  - Invoice Number: 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
- (package)** (package icon)
- + 1** (quantity selector)
- Record Sales Receipts** (green button) | **Cancel** (grey button)

**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.

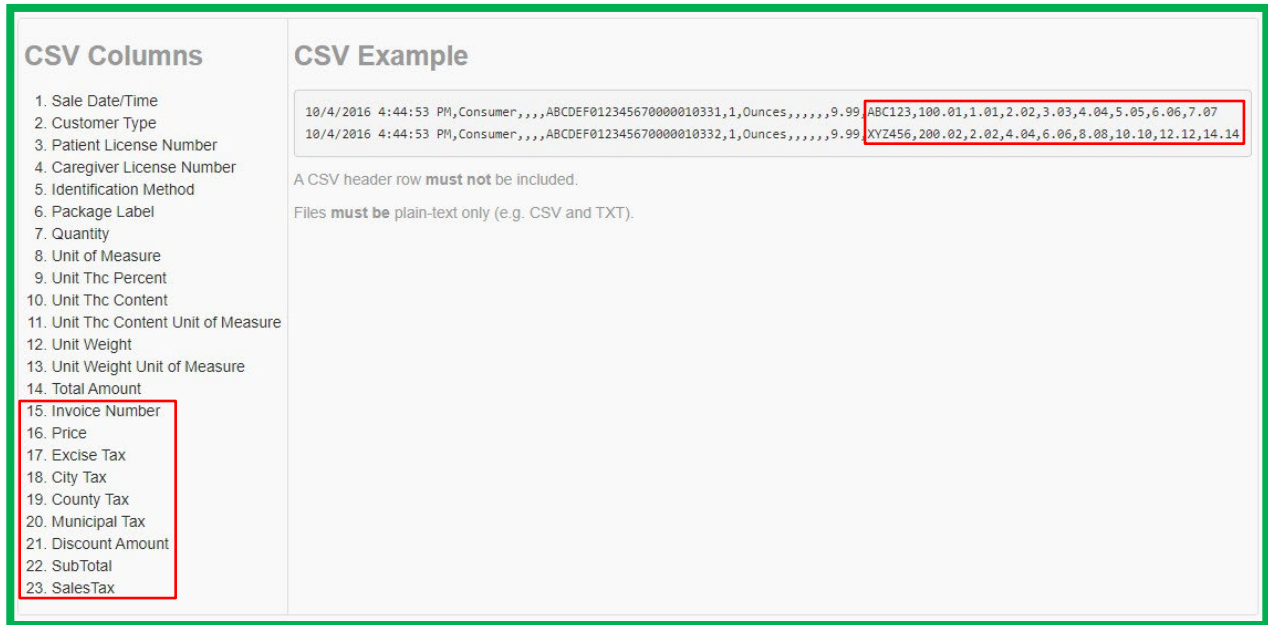
The *Transaction Details* can be viewed in the *Sales Receipt* drilldown by selecting the hidden columns as shown in **Figure 5** below. To unhide the columns, click on the three vertical dots on any column in the grid and select the *Columns* option from the drop down menu. Mark the checkboxes for the 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.**



The screenshot displays a guide for CSV imports, divided into two main sections: 'CSV Columns' and 'CSV Example'.

**CSV Columns:** A list of 23 columns is provided. Columns 15 through 23 are highlighted with a red box, indicating they are newly required. These columns are: Invoice Number, Price, Excise Tax, City Tax, County Tax, Municipal Tax, Discount Amount, SubTotal, and SalesTax.

**CSV Example:** Two rows of data are shown. The first row is: `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`. The second row is: `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`. The second parts of these rows (the tax-related fields) are highlighted with a red box.

Below the example rows, it states: "A CSV header row **must not** be included." and "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](mailto:support@metrc.com) or 877-566-6506 with any questions.