

## Metrc Bulletin

<b>Bulletin Number:</b> CA_IB_2023_003	<b>Distribution Date:</b> 03/30/23	<b>Effective Date:</b> 03/29/23
<b>Contact Point:</b> support@metrc.com	<b>Subject:</b> Metrc Program Updates for California Retailer Sales Delivery Requirements	
<b>Reason:</b> Updates on Retailer Sales Delivery Functionality to Support California Sales Delivery Requirements		

Please read on for an important update regarding the Metrc program in California. The information included in this bulletin covers updates for Retail Sales Delivery requirements going into effect on **April 1, 2023**, along with the latest system enhancements.

1. System performance enhancements
2. Configuration changes and updates to the Retailer Delivery functionality
3. Frequently Asked Questions

Further guidance from the DCC and Metrc on Retailer Delivery requirements can also be found here:

1. DCC [Regulations](#) for Delivery reporting requirements
2. DCC CannaConnect Compliance Hub [guidance and FAQs](#) for Delivery reporting
3. Metrc web application [user guidance bulletin](#) for Retailer Delivery functionality

Any further changes to this functionality will be communicated accordingly in a future bulletin.

Please read on for additional details regarding the updates to the Retailer Delivery reporting functionality and additional enhancements to increase new user “Welcome Email” and “Password Reset” expiration windows:

### System performance enhancements

Metrc has evaluated feedback from both integrator partners and California licensees indicating performance concerns around retailer deliveries. After evaluating Retailer Deliveries functionality, Metrc made several changes to improve performance when using this functionality in the User Interface (UI) and Application Programming Interface (API), including:

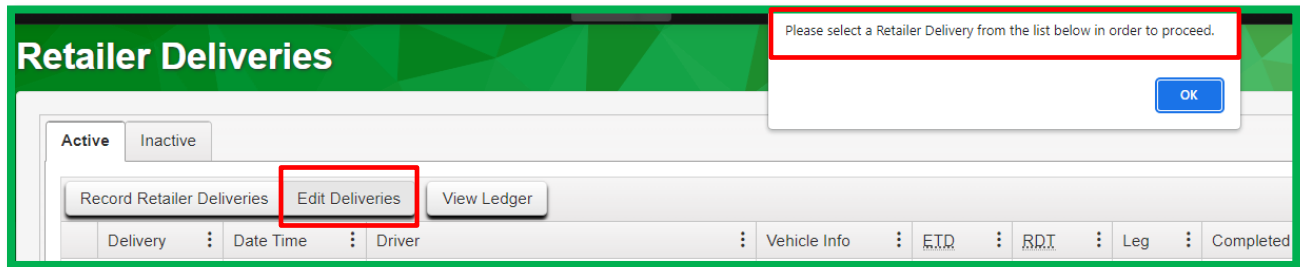
- Adjustments to the delivery database tables.
- Reducing the number of tables required to be queried when conducting actions for reporting and getting retailer delivery information.
- Removed UI edit lookups that relied on extensive amount of data being returned.
  - ***Please note:*** *Editing Retailer Deliveries is still a function, but the Retailer Delivery that is intended to be edited must be selected.*
- Improved background jobs that support Retailer Deliveries.

Metrc appreciates the feedback provided on this matter. Our goal is to ensure these features work as quickly and efficiently as possible.

## Configuration changes and updates to the Retailer Delivery functionality

In collaboration with DCC, licensees, and integrator partners, Metrc has made updates to the Retailer Delivery functionality to support a more streamlined approach that meets current regulatory requirements.

- The specific **Retailer Delivery**, **Sales Delivery**, and **Sales Receipt** to be edited must be selected on the grid prior to clicking on the *Edit* button. Otherwise, a pop-up message will be displayed as shown below (Figure 1) for Retailer Deliveries.

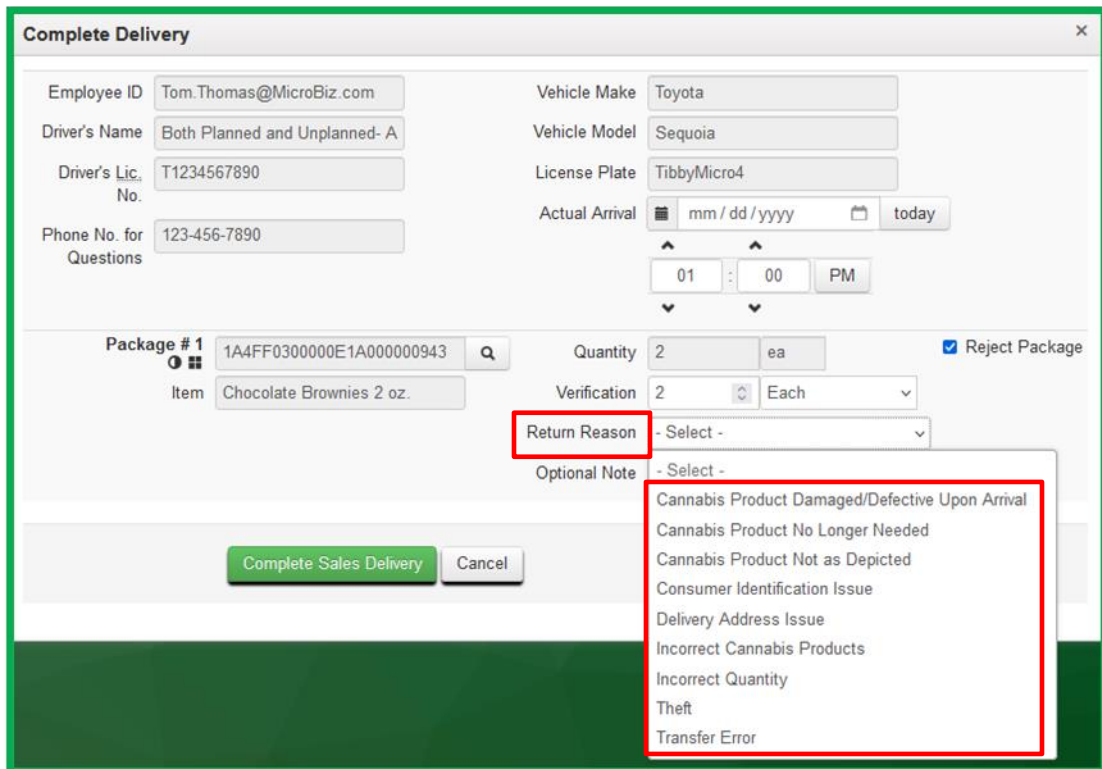


**Figure 1**

- Enhancements were made to the record and edit retailer delivery functionality s and to the **Delivery Inventory Ledger** to better accommodate the various combinations of scheduled and unscheduled deliveries that can be included on a single retailer delivery ledger.

- DCC configured new *Return Reasons* that must be selected when a scheduled delivery is unable to be completed. This is available when using the *Complete* button on the Sales Deliveries grid (see Figure 2 below).

**Please note:** The package must be marked as rejected.



The screenshot shows a 'Complete Delivery' form with the following fields:

- Employee ID: Tom.Thomas@MicroBiz.com
- Driver's Name: Both Planned and Unplanned- A
- Driver's Lic. No.: T1234567890
- Phone No. for Questions: 123-456-7890
- Vehicle Make: Toyota
- Vehicle Model: Sequoia
- License Plate: TibbyMicro4
- Actual Arrival: mm / dd / yyyy (today), 01 : 00 PM
- Package # 1: 1A4FF0300000E1A000000943
- Item: Chocolate Brownies 2 oz.
- Quantity: 2 ea
- Verification: 2 Each
- Return Reason: - Select - (dropdown menu open)
- Optional Note: - Select -
- Reject Package:

Buttons: Complete Sales Delivery, Cancel

Return Reason dropdown options:

- Cannabis Product Damaged/Defective Upon Arrival
- Cannabis Product No Longer Needed
- Cannabis Product Not as Depicted
- Consumer Identification Issue
- Delivery Address Issue
- Incorrect Cannabis Products
- Incorrect Quantity
- Theft
- Transfer Error

**Figure 2**

## **Frequently Asked Questions**

Metrc Support has been working with licensees and integrator partners to answer questions on the Retailer Deliveries functionality. Please review the list of commonly asked questions regarding Retailer Deliveries.

### **Q1. Can I only have scheduled (planned) deliveries on a retail delivery ledger?**

Yes, in accordance with the regulatory requirements, a retail delivery ledger reported into CCTT can be any of the following options for reporting purposes:

- Scheduled Only
- Unscheduled Only
- Both Scheduled and Unscheduled

### **Q2. If a scheduled delivery is cancelled by the customer, how can I report that to CCTT?**

Before departure, the Retailer Delivery can be edited to remove the cancelled delivery. After departure, the *Void* button associated to the delivery on the *Sales Delivery* grid must be used.

### **Q3. Can a retailer delivery ledger be active for multiple days?**

No, by the end of each calendar day in which the delivery occurred, the delivery inventory ledger must be updated with information about each sale that occurred, the ledger must be closed out, and unsold cannabis goods must be returned to the retailer's inventory in CCTT.

**Please Note:** If scheduled deliveries were not completed by the end of the calendar day, they should be voided using the *Void* button associated to the delivery on the *Sales Delivery* grid before the ledger is closed out in CCTT and added to a new ledger the next time it is scheduled. Otherwise, they will be completed automatically at the time the ledger is closed out in CCTT.

**Q4. Can a delivery vehicle return and retrieve additional inventory (Package UIDs) after initially starting a delivery?**

Yes, by using the *Restock* button associated to the delivery on the *Retailer Deliveries* grid, retailers can update inventory on hand for that unique delivery inventory ledger, as well as add new scheduled deliveries.

**Please Note:** If there are any scheduled deliveries within the delivery inventory ledger that have not been completed or voided at the time the restock occurs, they will be completed automatically in CCTT at that time.

**Q5. If a customer who purchased product(s) through a delivery service returns one or more product(s) to the same licensee's retail store that provided the delivery service, how should that be reported back to CCTT?**

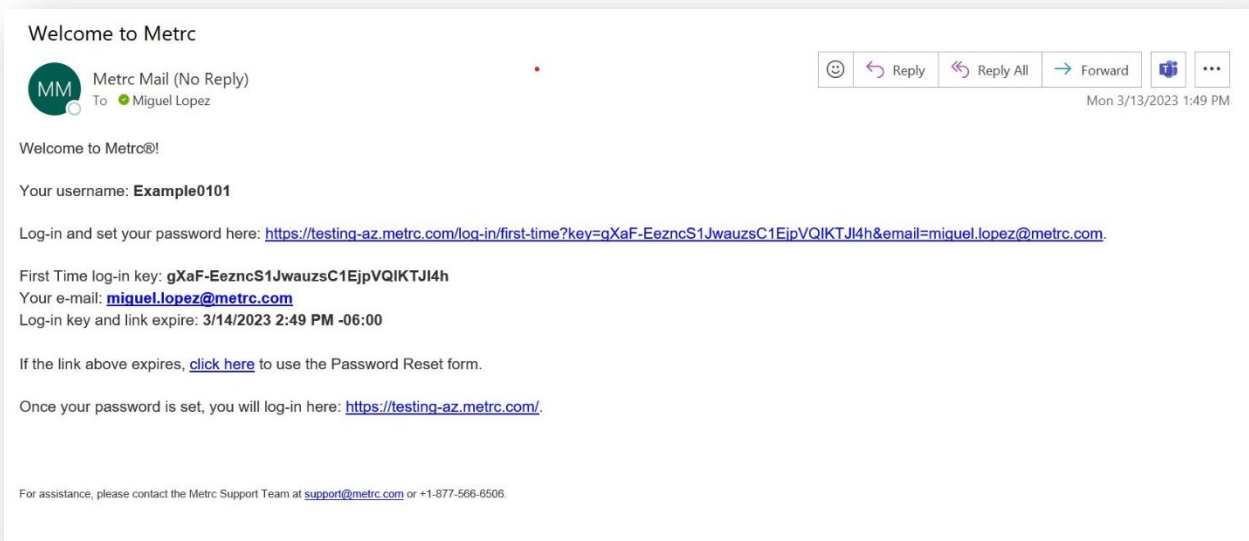
Similar to in-store returns, record a new *Sales Receipt* and report the returned quantity and price information (if a refund was issued) as negative values for each Package UID.

**Q6. Does the whole quantity of a Package UID have to go on the retail delivery ledger?**

No, a partial quantity amount from a Package UID can be put on a delivery ledger. Upon completion of the delivery, any unsold quantities taken on the retailer delivery for unscheduled sales will be returned to the original Package UID when the ledger is closed out.

## New user “Welcome Email” and “Password Reset” Expiration Window

When a new licensed user is granted access to the Metrc system or a password reset is required, an email is generated and sent for account registration or password reset. The registration and password reset links, which currently expire after 24 hours and requires Metrc Support or the Administrator(s) to reissue a new link, will be extended to a 72-hour expiration window. This extended window will provide adequate time to access the account and reduce time spent contacting Metrc Support or an Administrator to reissue a new link.



## Metrc Resources

Additional resources are available in the Metrc system in the Support dropdown located in the upper right corner of the navigational toolbar and can be utilized to access the Metrc Manual/User Guide, California Supplemental Guide, and other helpful information.

In addition, on-demand training is available in [Metrc Learn](#), an interactive learning management system, and the [Metrc Knowledge Center](#), a portal that provides on-demand access to various resource materials, including past bulletins and other helpful links.

If you have questions regarding information included in this bulletin, please contact Metrc Support at 877-566-6506 or [support@metrc.com](mailto:support@metrc.com) and provide your license # and Metrc username to aid in the inquiry process.