

Bulletin Number: CO_IB_5.24.23_Sales Deliveries	Distribution Date: 5/24/2023	Effective Date: 6/26/2023				
Contact Point: Metrc [®] Support Subject: New feature update						
Reason: Provide information on the latest feature release.						

Metrc is pleased to provide information on the latest system enhancements planned to deploy on June 26, 2023. These enhancements include:

- Sales Delivery Hub
 - **Note:** This updated enhancement is for licensees that are allowed to deliver sales directly to the consumer.
 - Enhancements have been made to improve workflows within the Sales Delivery Hub function in Metrc and to enhance the Sales Delivery Hub functionality for Store licensees that utilize a third-party integrator.



Sales Delivery Hub For Transporters

For licenses that are permitted to conduct sales deliveries directly to a consumer, sales deliveries can now be recorded by inputting the Transporter license that is performing the delivery. This process should be followed when a Transporter license, rather than a Store License employee, is being used to physically deliver the sale. Once the sales delivery is created, the Transporter license will have the ability to use the Sales Delivery Hub to record the following:

- Acceptance of the delivery
- Departure from the Store
- Arrival at the destination
- Verification of both ID and payment

Upon completion of the full process, the sales delivery must be completed in Metrc by the Store license. If the delivery was rejected, it should be marked as rejected within the Store's license.

To begin the sales delivery process, navigate to the Sales Delivery grid by selecting the Deliveries option under the Sales area found on the navigation bar at the top of the screen **(Figure 1)**.



Figure 1: Sales Menu with Deliveries Option

Please Note: If this option is not available, an Administrator will need to grant the user permission.

From the Sales Deliveries grid, select the "Record Deliveries" button to begin the process of creating the Sales Delivery as shown in **Figure 2**.



ales	Delive	eries	
Active	Inactive		
Recor	d Deliveries	Edit Deliveries	View Manifest

Figure 2: Record Deliveries button

Once the Record Deliveries button is selected, this will open a Record Deliveries action window to open to enter the details of the Sales Delivery. The Record Deliveries action window now offers the ability to assign the Transporter's license that will be physically delivering the sale as shown in **Figure 3** below. After all required information is entered, select the "Record Sales Delivery" button to complete the sales delivery creation process.



Record Delive	ries		×
Sales Delive	ery # 1		(clear)
Sale Date/Time	<pre>09/15/2021 today 12:18 PM </pre>	Consumer Id (optional) Name (optional)	
Est. Departure	 09/15/2021 today 12:18 PM 	<u>Est</u> Arrival	09/15/2021 today 12 18 PM
Planned Route	Example Route	Address Address Cont. City	1 Example Ln Boston
Transporter Facility	DO200001	County (optional) State + Zip	MA 🗸 02129
Driver 1	Type part of the Driver Name	Q (clear) Vehicle 1	Type part of the vehicle make, mc Q
Employee ID	X23421	Vehicle Make	Ford
Driver's Name	Joe Smith	Vehicle Model	E350
Driver's <u>Lic.</u> No.	S5653234	License Plate	WL43TC
Phone No. for Questions	1234567890		
Pack	age #1 ABCDEF012345670000013	8802 Q (clear) Quantity	7 Grams 🗸
A	vailable	Total Price	\$ 90
(pac	kage)		
+ 1			
	Record Sales Deliveries	Cancel	

Figure 3: Alternate Delivery License

After the sales delivery has been created by the Store licensee, it will appear in the new Sales Delivery Hub within the Transporter's Metrc license.

To navigate to the Sales Delivery Hub, select Delivery Hub under the Sales area found on the top navigational bar as shown in **Figure 4** below.





Figure 4: Navigate to Delivery Hub

From the Sales Delivery Hub grid, all deliveries associated with the transporter license are visible. **Note**: The transporter license can edit all transporter details (drivers, vehicles, etc.) but cannot edit the other content of the delivery.

After the Transporter license has arrived at the Store's facility and physically accepted the product to be delivered, the delivery can be accepted in Metrc by using the "Accept" button as shown in **Figure 5**.

	Delivery :	Sales :	Customer Type	Destination :	Direction :	Driver :	Vehicle Info	Accepted :	ATR :	ATA :	ATRD :	ID Verified	Ray :	
,	000000061	09/15/2021 12:18 pm	Consumer	Street1: 1 Example Ln Street2: City: Boston State: MA Postal Code: 02129	→ Outbound	Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC					No		Edit Accept

Figure 5: Accept Sales Delivery

After accepting the delivery in Metrc, confirmation of the Transporter's departure can be completed using the "Depart" button shown in **Figure 6**.

ĺ															
		Delivery :	Sales :	Customer Type	Destination :	Direction :	Driver :	Vehicle Info	Accepted :	AT.D.	ATA :	AT.RD :	ID Verified	Ray	:
	•	000000061	09/15/2021 12:18 pm	Consumer	Street1: 1 Example Ln Street2: City: Boston State: MA Postal Code: 02129	→ Outbound	Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC	09/15/2021 12:28 pm				No		Edit Depart

Figure 6: Mark Departure from Retailer Facility

When making a delivery, the end recipient's ID must be verified. Once ID verification is confirmed, the "Verify ID" button should be used as shown in **Figure 7**.

View N	Nanifest																	۵·		₹.		• •
De	livery	:	Sales :	Customer Type	Destination :	Direction :	Driver	÷	Vehicle Info	:	Accepted :	ATD	÷	ATA	÷	ATRD	÷	ID.Verified	÷	<u>Pay</u>	÷	_
▶ 000	0000061		09/15/2021 12:18 pm	Consumer	Street1: 1 Example Ln Street2: City: Boston State: MA Postal Code: 02129	→ Outbound	Joe Smith		Make: Ford Model: E350 Lic. Plate: WL43TC		09/15/2021 12:28 pm	09/15/202 04:30 pm	1					No				Edit Verify Id



Figure 7: Verify ID of Recipient

Selecting the "Verify ID" button will open an action window where the Payment Type - Cash or Electronic - should be captured using the dropdown shown in **Figure 8**.

Verify Custom	er Identification			×
Employee ID	X23421	Vehicle Make	Ford	
Driver's Name	Joe Smith	Vehicle Model	E350	
Driver's <u>Lic.</u> No.	S5653234	License Plate	WL43TC	
Phone No. for Questions	1234567890	Payment Type For Delivery	Electronic	×
	Verfiy Customer Id	Cancel		

Figure 8: Verify ID Action Window & Payment Type

Once this process is completed by the Transporter, the Store licensee will then be able to complete the sales delivery in their license by selecting the "Complete" button in the Sales Deliveries grid as shown in **Figure 9**.

Activ	/e Inactive											
Record Deliveries Edit Deliveries View Manifest												
	Delivery :	Transporter :	Sales :	Customer Type	Patient :	Driver :	Vehicle Info	Pkg's :	Total :	Recorded :	State :	
•	000000071	DO200001 MA Delivery Courier	10/12/2021 12:35 pm	Consumer		Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC	1	\$40.00	10/12/2021 10:36 am	Shipped	Complete Void

Figure 9: Complete Sales Delivery

Selecting the "Complete" button will open an action window where the sales delivery can be completed by selecting the green Complete Sales Delivery button as shown in **Figure 10**.



Complete Deli	very						×
Employee ID	X2342	1		Vehicle Make	Ford		
Driver's Name	Joe Sm	hith		Vehicle Model	E350		
Driver's <u>Lic.</u> No.	S56532	234		License Plate	WL43TC		
Phone No. for Questions	123456	57890		Actual Arrival	iiii 09/15/202	21 to	day
Payment Type For Delivery	Electro	onic 🗸			12 : 18	PM	
Pack	age # 1	ABCDEF01234567000001380	2 Q	Quantity	7	g	Reject Package
	Item	M0000000002: Buds - Blue D	rea				
		Complete Sales Delivery	Cancel	J			

Figure 10: Complete Sales Delivery Action Window

If the sales delivery was unable to be completed, the "Reject Package" checkbox should be selected in the Complete Delivery action window, a return reason should be selected from the Return Reason dropdown, and additional details provided in the Optional Note text box. Finally, the rejected delivery should be completed by clicking on "Complete Sales Delivery" as shown below in **Figure 11**.



Complete Deli	very								×
Employee ID	X23421				Vehicle Make	Ford			
Driver's Name	Joe Sm	iith			Vehicle Model	E350			
Driver's <u>Lic,</u> No.	S56532	234			License Plate	WL43TC			
Phone No. for	123456	7890			Actual Arrival	1 09/15/202	today		
Questions Payment Type	Electro	onic 🗸				^ ^ 1 2 : 18	PM		
For Delivery						* *			
					<u>Est.</u> Return Departure	m	today		
					Dopartaro	12 · 34	PM		
						× ×			
					<u>Est.</u> Return	iii	today		
					Arrival	^ ^			
						12:34	PM		
Deale						• •	Y		
Packa	age # 1	ABCDEF0123456700000	13802	۹	Quantity	7	g		Reject Package
	Item	M0000000002: Buds - B	lue Dre;		Verification	7	Grams	*	
					Return Reason	Undeliverable	<u>;</u>	~	
					Optional Note	No answer at	the door		
		Complete Sales Delive	ry Car	ncel					
				leel					

Figure 11: Rejected Sales Delivery Action Window

Once completed, the sales delivery will be finalized and automatically be moved to the "Inactive" tab in the Sales Deliveries grid as shown below in **Figure 12**. If the Sales Delivery package was rejected, then all package contents are then returned to the original source package and are reflected in the package history as a return.



©metr	c Packages	s +	Transfers -	Sale	s 🗧 Rep	orts	+ Admin +	
Sale	s Deliv	erie	s			J		
Acti	ive Inactive							
	/iew Manifest							
	Delivery	: 1	Transporter	:	Sales	:	Customer Type	:
	0000000111	41 M	02-X0001 IA Marijuana Retailer		05/05/2023 12:15 pm		Consumer	
	000000108	4 M	02-X0001 IA Marijuana Retailer		04/07/2023 04:13 pm		Consumer	

Figure 12: Inactive Deliveries tab

Metrc Resources

Additional resources are available in Metrc 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, the State Supplemental Guide, and other helpful information.

In addition, on-demand training is available in <u>Metrc Learn</u>, an interactive learning management system, and the <u>Metrc Knowledge Center</u>, 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 <u>support@metrc.com</u> and provide your license # and Metrc username to aid in the inquiry process.