Metrc Support Bulletin

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)**.
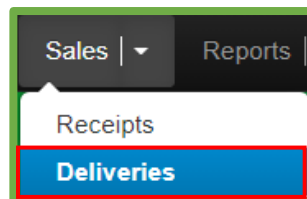

Figure 1: Sales Menu with Deliveries Option

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**.
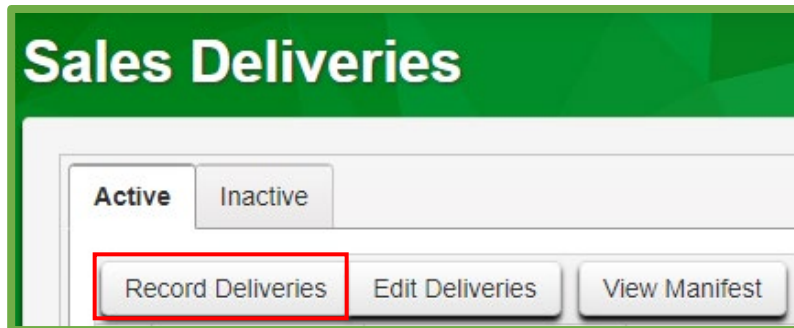
Figure 2: Record Deliveries button

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.
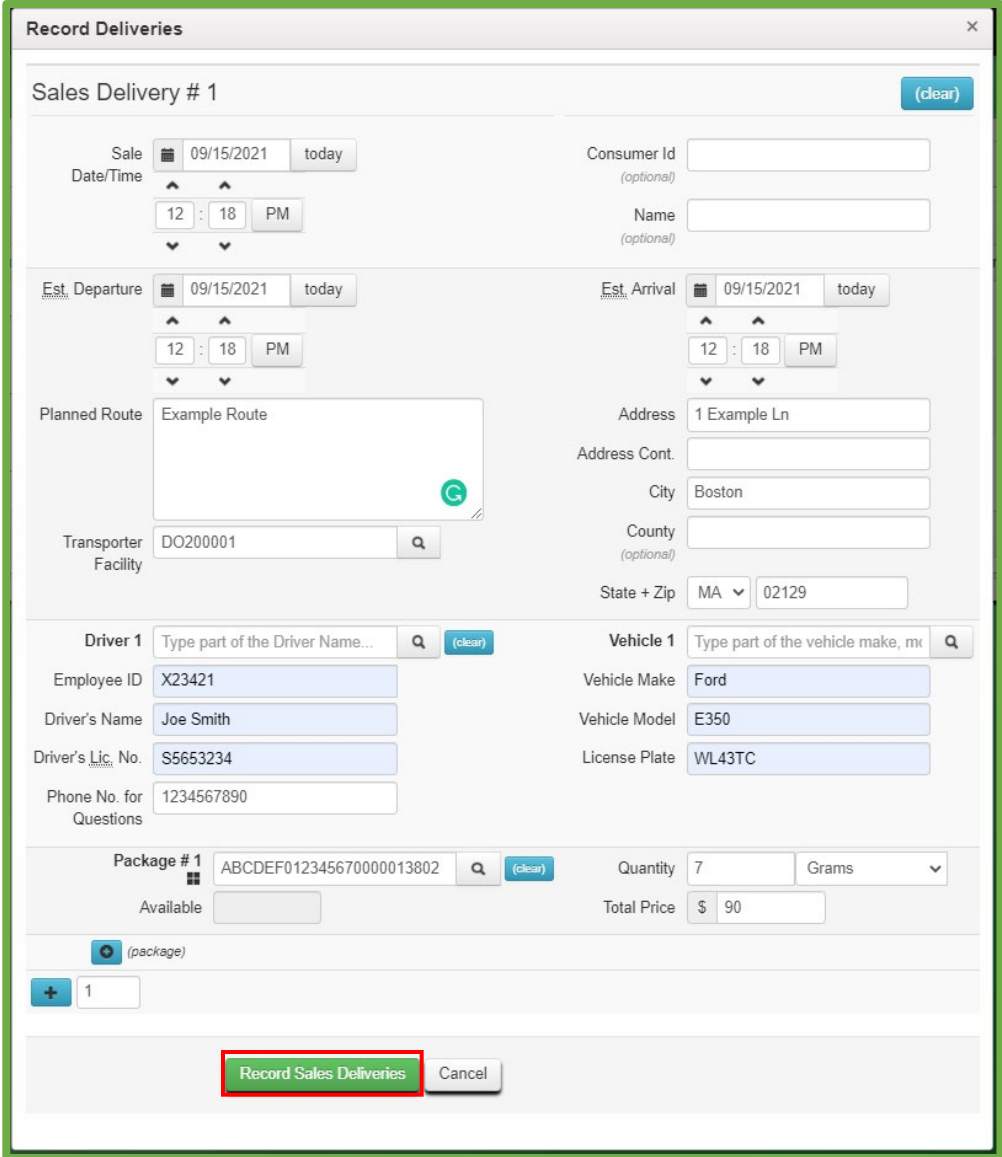
Figure 3: Alternate Delivery License

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.

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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**.

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**.
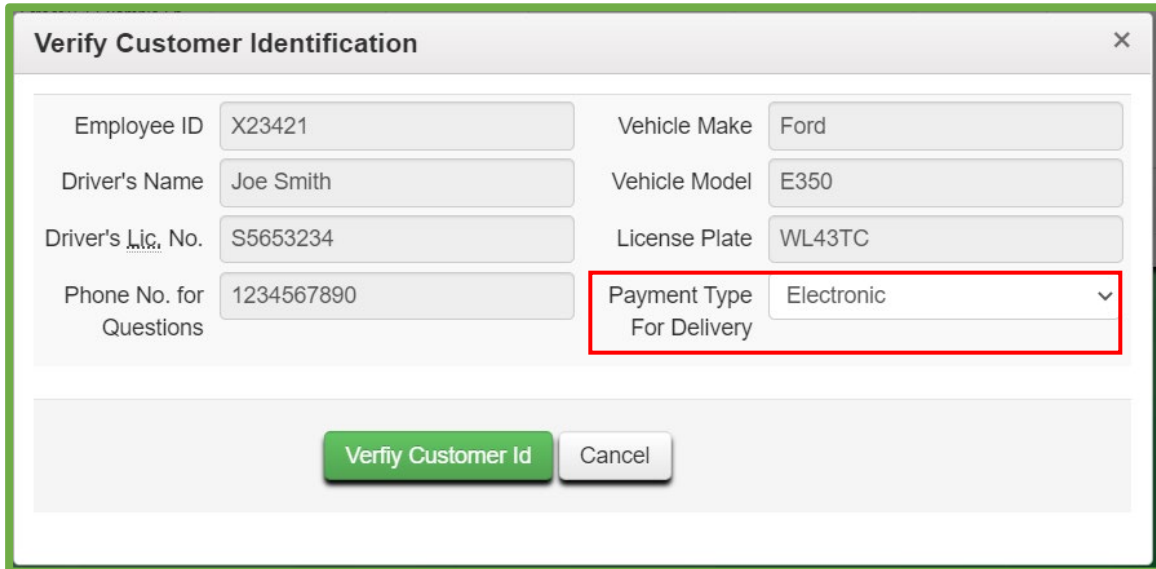

Figure 6: Mark Departure from Retailer Facility

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**.

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**.
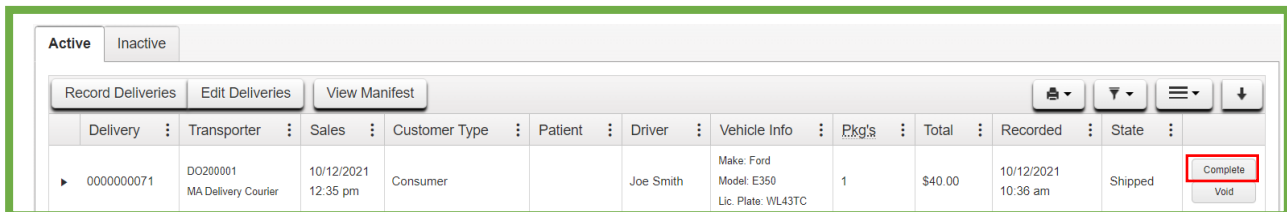

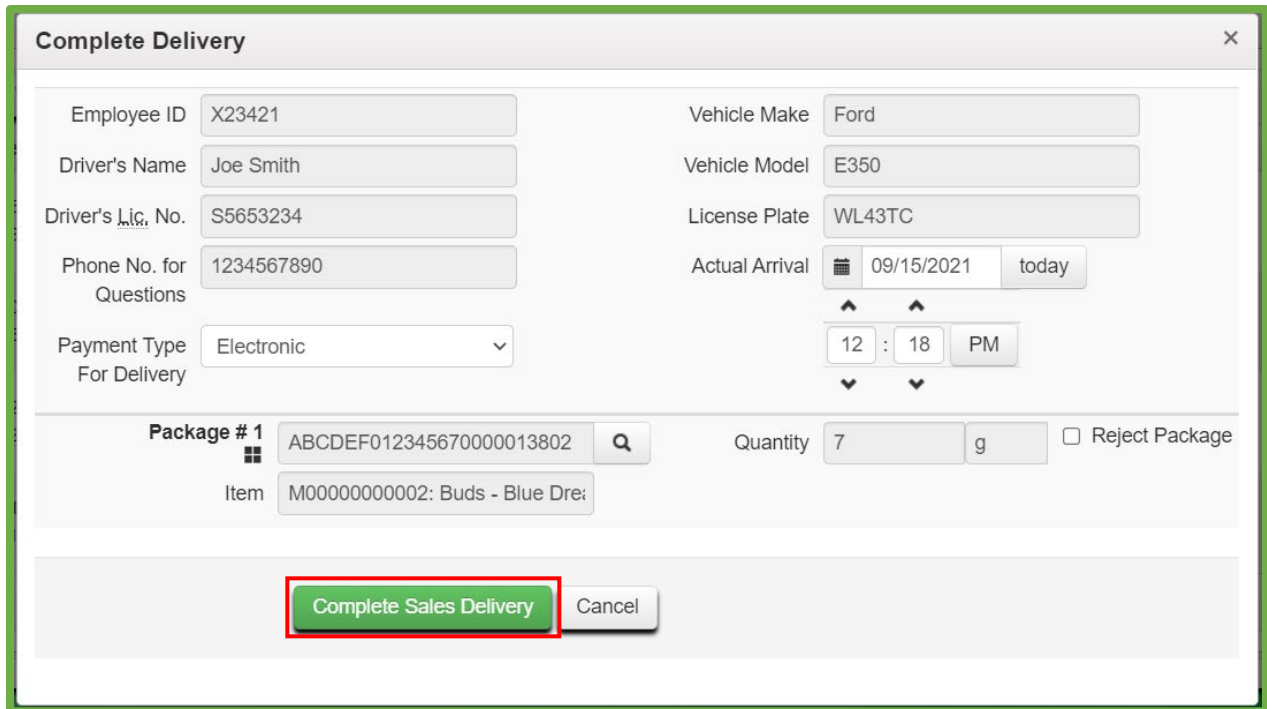**Figure 8: Verify ID Action Window & Payment Type**

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**.

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**.

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**.

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.
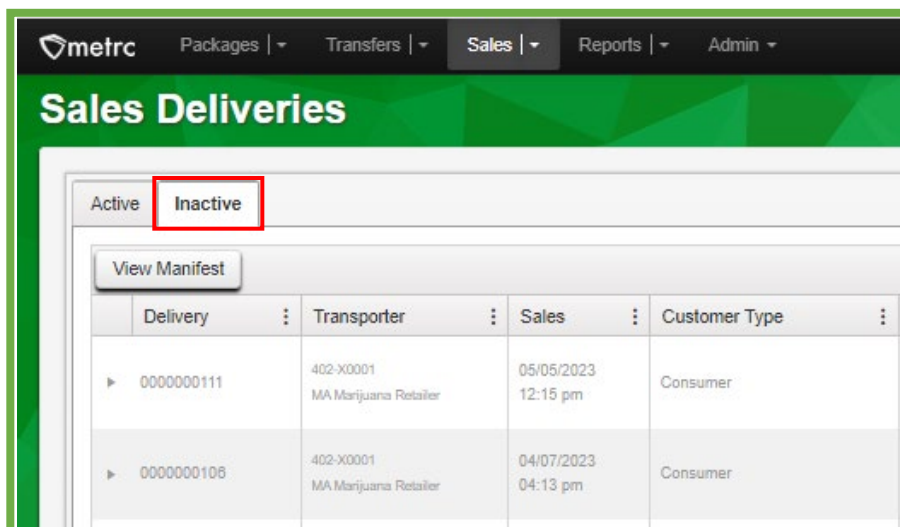
Figure 12: Inactive Deliveries tab

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 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 and provide your license # and Metrc username to aid in the inquiry process.