

Bulletin Number: NV_IB_70	Distribution Date: 08/02/23	Effective Date: 08/31/23								
Contact Point: Metrc Subject: New feature updates. Support Subject: New feature updates.										
Reason: New functionality and features are now available in Metrc.										

Greetings Metrc® users,

Metrc is pleased to provide information on the latest system enhancements planned to deploy on August 31, 2023. These enhancements include:

- Edit Wholesale Transfer Price The originating facility that created the Wholesale Transfer can now edit the wholesale price after the transfer has been received.
- Sales Delivery Hub Enhancements have been made to improve workflows within the Sales Delivery Hub function in Metrc and for Dispensary licensees that utilize a third-party integrator.

Note: This updated enhancement is for licenses that are permitted to deliver sales directly to the consumer.

• Dual Licensed Facilities - Licenses operating both medical and retail facilities, will have the ability to order medical and retail tags within a Retail account.

Please see the following pages for further details.



Edit Wholesale Transfer Price

Metrc has updated the ability for an originating facility to edit the Wholesale Price prior to or after a transfer has been received by the receiving license. Previously, if the originating license input the incorrect price on the Wholesale Transfer when creating the transfer, there was no way to correct this for reporting. Now, the originating license who created the Wholesale Transfer can edit the Wholesale Price for up to six months after the date of creation.

In the **Outgoing** Transfers grid, an Edit button has been added to allow for transfer price errors to be corrected as shown in **Figure 1**.

					Edit Void	
coming (1/1) Inactive	Outgoing (55) Rejected (1) Inactive				(a	-)[4
Manifest	: Destination	Stops :	Pkg's	Employee	Date Created	
0000012701	402R-X0001 (CO LOFTY ESTABLISHMENT, LLC)	1	1	David Eagleson	11/07/2022 02:52 pm	Edit Void
0000012401 📰	3a-X0001 (AK LOFTY ESTABLISHMENT, LLC)	1	1	David Eagleson	08/09/2022 10:33 am	Edit Void
0000011901	3a-X0001 (AK LOFTY ESTABLISHMENT, LLC)	1	1	METRC INDUSTRY ADMIN	02/24/2022 07:44 am	Edit Vold
000000121	402-X0001 (CO LOFTY ESTABLISHMENT, LLC)	1	12	RETAILER OWNER	01/08/2019 10:31 am	Edit Vold
0000000116	402-X0001 (CO LOFTY ESTABLISHMENT, LLC)	ī	5	RETAILER OWNER	01/08/2019 10:31 am	Edit
H A Page 1	of 1 I I Trows per page				Viewing 1 - 5 (5 total)	0

Figure 1: Edit button added to Outgoing Transfers

After the transfer has been received by the destination license, the Edit button appears in the **Inactive** Transfers grid as shown in **Figure 2**.

													1	
00	ming (24/24) Inactive Qu	itaoin	a (37(37) Dejected (6) Inactive											
011	inig (24/24) indeate Ou	ngoin												
												A.	<u>.</u>	:• \ +
	Manifest	:	Destination	:	Stops	:	Pkg's	:	Employee	:	Date Created		1	
	0000080601													Edit
-	0000080501 ••		050-X0002 (OR LOFTY ESTABLISHMENT, LLC)		1		1		Brent Doherty		07/13/2023 07:37 am			Edit



Edit



After selecting the Edit button, the **Edit Licensed Transfer** action window will open as shown in **Figure 3**. Now the wholesale price can be edited to reflect the correct wholesale prices and save the changes using the Save Transfer button.

Edit Licensed	Transfe					
Manifest	0000080	601				
Destination 1	030-X00	01	Q (clear)		Туре	Wholesale
Planned Route	testing p	rice edit		Est.	Departure	iii 07/24/2023 today
						12 : 52 PM
				E	Est. Arrival	i 07/24/2023 today
						∧ ∧
						01 : 52 PM
			h			¥ ¥
Tran	sport # 1	030-X0001	c	(clear)		
P	hone No.	5556667789				Layover
	Driver 1	Type part of the Driver	Name C	(clear)	Vehicle 1	Type part of the vehicle make, mc Q
Drive	er's Name	John Doe		Vel	hicle Make	Ford
Em	ployee ID	X00420		Veh	nicle Model	F150
Driver	s <u>Lic.</u> No.	t1231545666		Lic	ense Plate	085-GLD
Pack	age # 1	1A4FF030000000100000	0647 Q	(clear)		
Whs	e Price	\$ 499				
Ð	(pac	kage)				
		Save Transfer Car	ncel			
			_			

Figure 3: Edit Licensed Transfer Window

Once all changes to the wholesale transfer have been made, those changes can be found by selecting the arrow on the far left of the wholesale transfer in the transfers grid, then selecting the History tab as shown in **Figure 4** below.

1.5

®

	Manifest		Destination
.4	0000080601		030-X0001 (OR MISHMASH IMMERSION, LLC)
	Destinations Transporte	er Details N	Notes History
	Description		
	Destination OR MISHMA	H IMMERSIO	N LLC (030-X0001) Received

Figure 4: View History of Changes to Licensed Transfer



Sales Delivery Hub

For licenses that are permitted to report sales deliveries directly to a customer, sales deliveries can now be recorded by associating a transporter license to deliver the sale. This process should be followed when a license, other than the Retailer license, is being used to physically deliver the sale. Once the sales delivery is created, the transporter license will use the new Sales Delivery Hub to record the following:

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

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

To begin this process, navigate to the Sales Delivery grid by selecting the Deliveries option under the Sales area found on your navigational toolbar at the top of the screen as shown in **Figure 5**.



Figure 5: Deliveries Option in the Sales Area Option

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

From Sales Deliveries grid, select the "Record Deliveries" button to open the action window to begin the process of creating the Sales Delivery as shown in **Figure 6**.

Smetrc

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

Figure 6: Record Deliveries Button

In the Record Deliveries action window, record the details of the Sales Delivery, which now offers the ability to assign the licensee that will be physically delivering the sale if it differs from the Retailer's license as shown in **Figure 7**. After all required information is entered, select the "Record Sales Delivery" button to complete the sales delivery creation process.

Sales Delive	ery # 1					(clear)
Sale Date/Time	© 09/15/2021 today		Consumer Id (optional) Name (optional)			
Est Departure	09/15/2021 today 12:18 PM		<u>Est</u> Arrival	 09/15/20 12 : 18 • • 	021 today PM	
Planned Route	Example Route	C	Address Address Cont. City	1 Example L Boston	n	
Transporter Facility	DO200001	Q	County (optional) State + Zip	MA 🗸 02	2129	
Driver 1	Type part of the Driver Nam	18 Q (clear)	Vehicle 1	Type part of	the vehicle make	, m: Q
Employee ID	X23421		Vehicle Make	Ford		
Driver's Name	Joe Smith		Vehicle Model	E350		
Driver's Lic. No.	S5653234		License Plate	WL43TC		
Phone No. for Questions	1234567890					
Pack	age #1 ABCDEF01234567	70000013802 Q	(clear) Quantity	7	Grams	~
A	vailable		Total Price	\$ 90		
0 (pac	kage) Record Sales D	eliveries Cancel				

Figure 7: Record Deliveries Action Window



After the sales delivery is created by the Retailer licensee, it will appear in the Sales Delivery Hub grid within the transporter's Metrc license.

To navigate to the Sales Delivery Hub, select the Delivery Hub option under the Sales area found on the navigational toolbar as shown in **Figure 8**.



Figure 8: Navigate to Delivery Hub

From the Sales Delivery Hub grid, all deliveries where the license was listed as the transporter are visible.

Note: The transporter license can edit all transporter details (drivers, vehicles, etc.) but cannot edit the content of the delivery.

After the transporter license has arrived at the originating facility and the transporter has accepted the delivery physically, the transporter can mark the sales delivery as Accepted using the "Accept" button as shown in **Figure 9**.

S	al	es Deli [,]	very ⊦	lub											rier DO2000 Massachusetts Test
	Vi	ew Manifest	Sales :	Customer Type :	Destination :	Direction :	Driver :	Vehicle Info :	Accepted :	ATD :	ATA :	ATRD :	D Verified	₹ • Pav	≡ • +
	٠	0000000061	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	hanna paon			induction a	No	61m).	Edit Accept

Figure 9: 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 10** below.



Sal	es Deliv	very H	lub												M	assachusetts Tes
V	iew Manifest	0-1 •	0	Destination	Disastian .	Driver	Vehiele lefe	Accented	• • • • • •		ATA .	4700	. ID Verified	T •		• •
•	0000000061	09/15/2021 12:18 pm	Customer Type :	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	: ALD	: /	ALA :	ALKD	No	: May	:	Edit Depart

Figure 10: Mark Departure from Retailer Facility

When making a sales 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 11**.

S	al	es	De	liv	very	Η	ub					/															Massa	er DO2000
	Vi	iew N	lanifest																				ê-		₹ -		-	÷
		De	livery	÷	Sales	:	Customer Type	:	Destination :	Direction :	Driver :	V	Vehicle Info	1	Accepted :	A	TR :	A	TA :	A	TRD	÷	ID Verified	÷	Pay	-		
	٠	000	0000061		09/15/2021 12:18 pm		Consumer		Street1: 1 Example Ln Street2: City: Boston State: MA Postal Code: 02129	→ Outbound	Joe Smith	M Li	Make: Ford Model: E350 .ic. Plate: WL43TC	1	09/15/2021 12:28 pm	09 04	9/15/2021 4:30 pm						No				C	Edit Verify Id

Figure 11: Verify ID of Recipient

Selecting the "Verify ID" button will trigger an action window where the Payment Type -Cash or Electronic - should be captured using the dropdown menu shown in **Figure 12**. Then select the Verify Customer Id button to complete the verification process for sales delivery.

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 12: Verify ID Action Window & Payment Type



Once this process is completed by the transporter, the Retailer license 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 13**.

Sa	le	s Deliv	eries												marijuana Ko	etaner 402 Massachusetts
ſ	Act	ive Inactive Record Deliveries	s Edit Deliveries	View M	fanifest									A.	••][≡	•]+]
		Delivery :	Transporter :	Sales :	Customer Type	Patient :	Driver :	Vehicle Info	ETD :	ETA :	Completed :	Pkg's :	Total :	Recorded :	State :	
	ŀ	000000061	DO200001 MA Delivery Courier	09/15/2021 12:18 pm	Consumer		Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC	09/15/2021 12:18 pm	09/15/2021 12:18 pm		1	\$90.00	09/15/2021 12:21 pm	Shipped	Complete Void

Figure 13: Complete Sales Delivery

Selecting the "Complete" button will open an action window where the sales delivery can be finalized by selecting the green Complete Sales Delivery button as shown in **Figure 14**.

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	37890	Actual Arrival	iii 09/15/2021 today
Payment Type For Delivery	Electro	onic 🗸		12:18 PM
Pack	age # 1 ■ Item	ABCDEF012345670000013802 M0000000002: Buds - Blue Drea	Q Quantity	7 g Reject Package
		Complete Sales Delivery	Cancel	

Figure 14: Complete Sales Delivery Action Window



If the sales delivery was unable to be completed, the "Reject Package" checkbox should be selected, a return reason will need to be selected from the Return Reason dropdown, and additional details provided in the Optional Note text box as shown in **Figure 15**.

Complete Deli	very					×
Employee ID	X23421	1			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 Questions	123456	37890			Actual Arrival	Image: 09/15/2021 today
Payment Type For Delivery	Electro	onic 🗸				12:18 PM
i di Bolivery					<u>Est.</u> Return Departure	today 12:34 PM
					<u>Est.</u> Return Arrival	today
Pack	age # 1	ABCDEF0123456700000	13802	Q	Quantity	7 g Reject Package
	Item	M0000000002: Buds - B	lue Dre;		Verification	7 Grams V
					Return Reason	Undeliverable 🗸
					Optional Note	No answer at the door
		Complete Sales Delive	ny Ca	ancel]	

Figure 15: Rejected Sales Delivery Action Window



Once completed, the sales delivery will be finalized and automatically moved to the "Inactive" tab in the Sales Deliveries grid as shown in **Figure 16**.

Vi	iew Manifest																				1	6- Y-	=	- 11
	Delivery	:	Transporter :	S	ales :	Customer Type	;	Patient	Driver	:	Vehicle Info	:	ETD :	ETA :	AA :	:	Completed	:	Pkg's	Total		Recorded :	St	ate
	0000010576		N/A N/A	02	2/08/2023 1:47 pm	Consumer			Jane Doe		Make: Toyota Model: Camry XLE		02/08/2023 04:47 pm	02/08/2023 04:47 pm	02/08/2023 04:47 pm		02/08/2023 01:53 pm		1	\$100.00		02/08/2023 01:53 pm	Co	mplete

Figure 16: Inactive Deliveries tab



Dual Licensed Facilities

For licenses that are operating both medical and retail facilities, you will have the ability to order medical and retail tags within your Retail license by following the normal process to order tags.

To place a tag order, go to the Admin area on the navigational toolbar and select the Tag Order option. Once in the Tag Order grid, click the New Tag Order button to open the action window to place a new tag order. You will see the new options to order both types of tags (medical and retail) will now be available as shown in **Figure 17**.

New Tag Order					×
Order Details					
Facility License	NV LOFTY ESTABLISHMENT, LLC 403R-X0001	Medical Plant Tag	Count ×	(\$0.4500 ea., 5,000 max.)	\$0.0000
Physical Address	N/A	Cannabis Plant Tag	Count ×	(\$0.4500 ea., 5,000 max.)	\$0.0000
		Medical Package Tag	Count ×	(\$0.2500 ea., 5,000 max.)	\$0.0000
		Cannabis Package Tag	Count ×	(\$0.2500 ea., 5,000 max.)	\$0.0000
		Subtotal			\$0.00
-					

Figure 16: New Tag Order Action Window

Please contact Metrc Support at <u>support@metrc.com</u> or 877-566-6506 with any questions.