

Bulletin Number: NV_IB_70	Distribution Date: 08/02/23	Effective Date: 08/31/23
Contact Point: Metrc 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**.

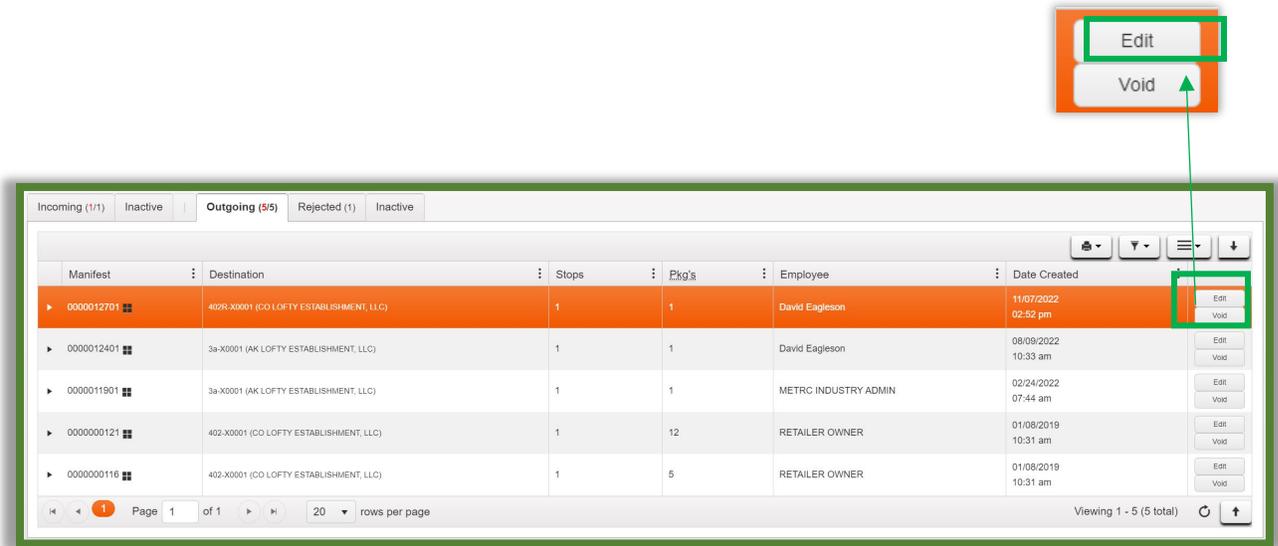


Figure 1: Edit button added to Outgoing Transfers

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

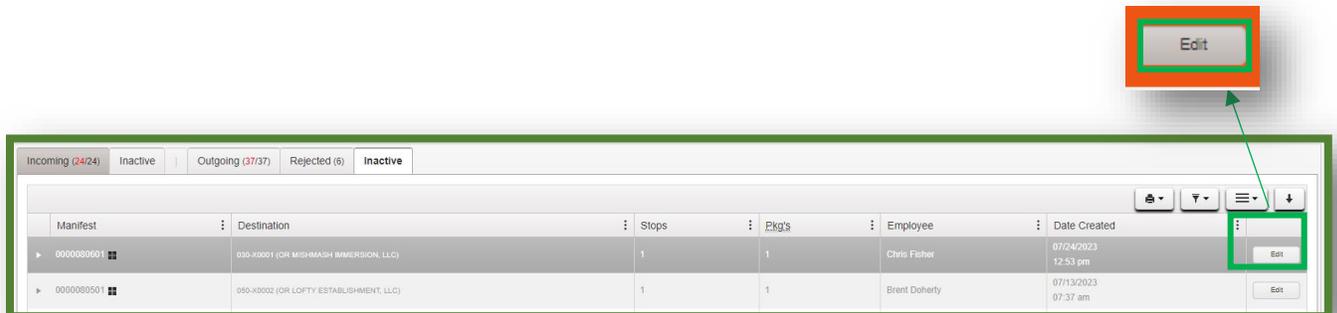


Figure 2: Edit button added to Inactive Transfers

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 Transfer

Manifest: 0000080601

Destination 1: 030-X0001 (clear)

Planned Route: testing price edit

Type: Wholesale

Est. Departure: 07/24/2023 today
12 : 52 PM

Est. Arrival: 07/24/2023 today
01 : 52 PM

Transport # 1: 030-X0001 (clear)

Phone No.: 5556667789 Layover

Driver 1: Type part of the Driver Name... (clear)

Driver's Name: John Doe

Employee ID: X00420

Driver's Lic. No.: t1231545666

Vehicle 1: Type part of the vehicle make, mc (clear)

Vehicle Make: Ford

Vehicle Model: F150

License Plate: 085-GLD

Package # 1: 1A4FF0300000001000000647 (clear)

Whsle. Price: \$ 499

(package)

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.

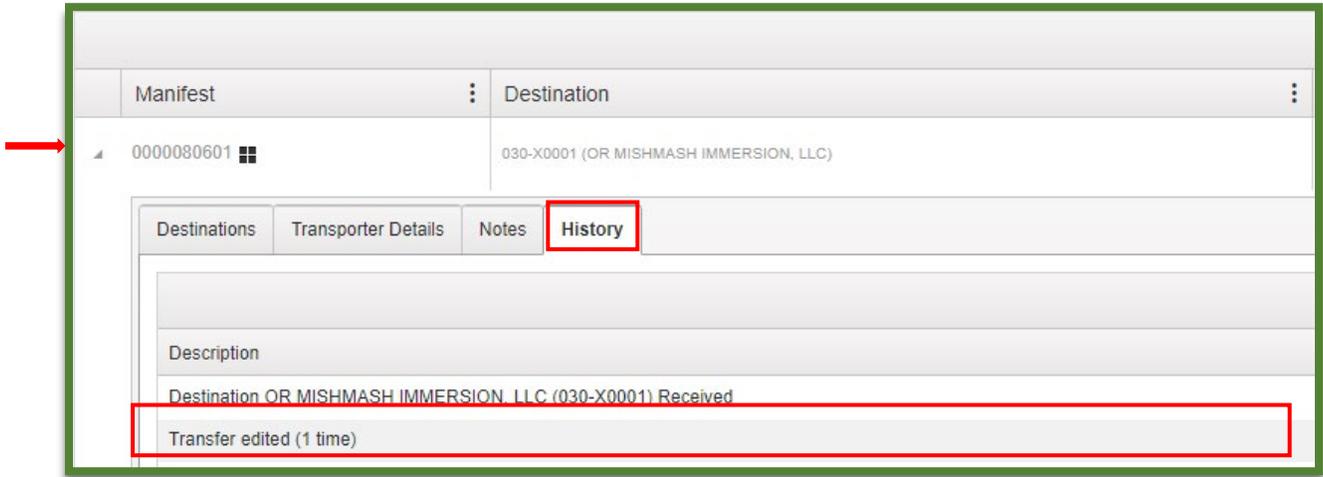


Figure 4: View History of Changes to Licensed Transfer

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 Metric 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**.

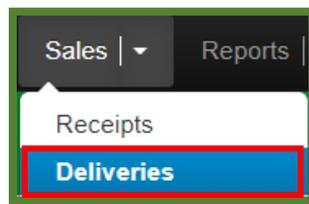


Figure 5: Deliveries Option in the Sales Area Option

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**.

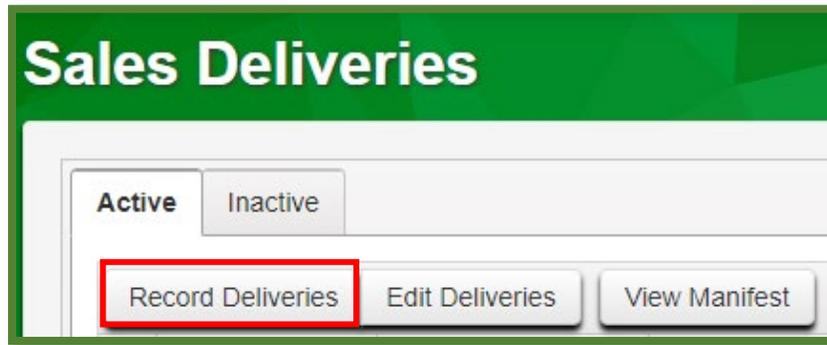


Figure 6: Record Deliveries Button

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.

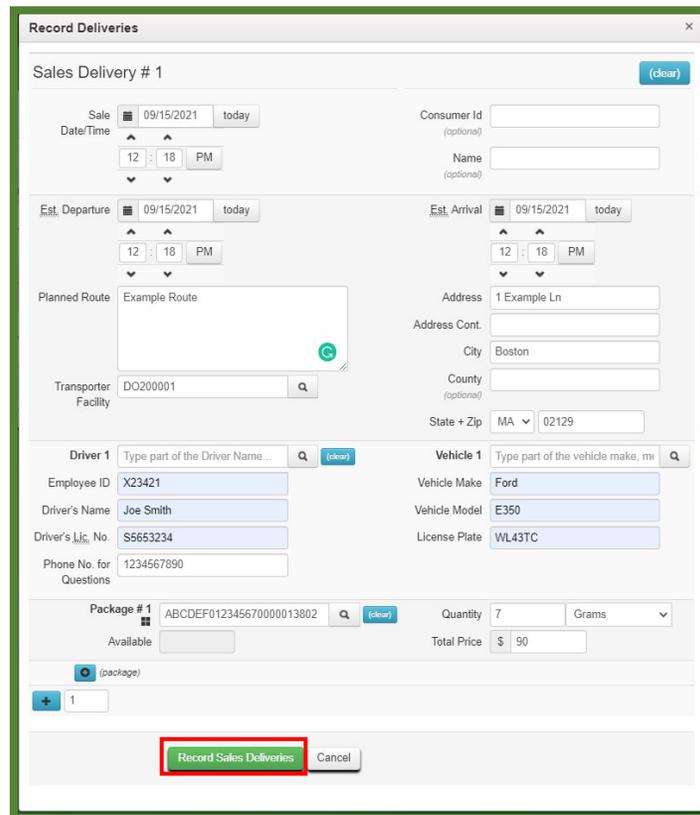


Figure 7: Record Deliveries Action Window

After the sales delivery is created by the Retailer licensee, it will appear in the Sales Delivery Hub grid within the transporter’s Metric 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**.

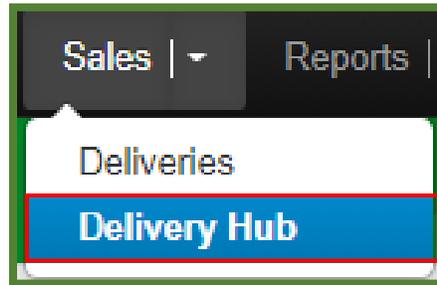


Figure 8: Navigate to Delivery Hub

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**.

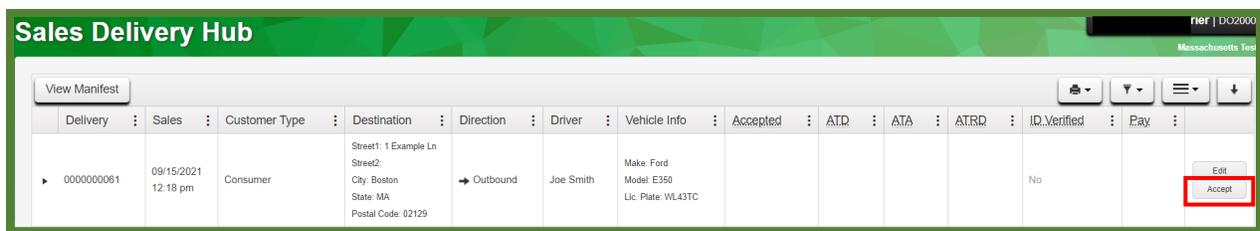


Figure 9: Accept Sales Delivery

After accepting the delivery in Metric, confirmation of the transporter’s departure can be completed using the “Depart” button shown in **Figure 10** below.

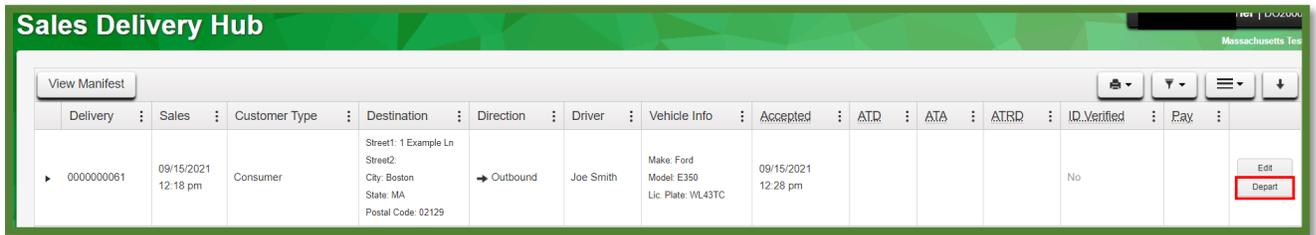


Figure 10: Mark Departure from Retailer Facility

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**.

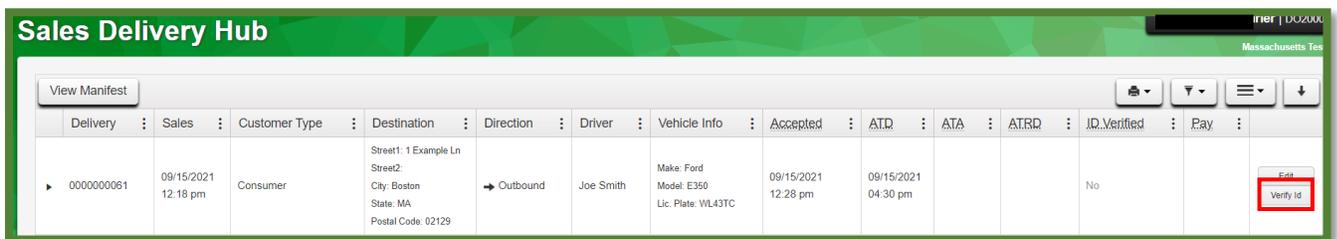


Figure 11: Verify ID of Recipient

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.

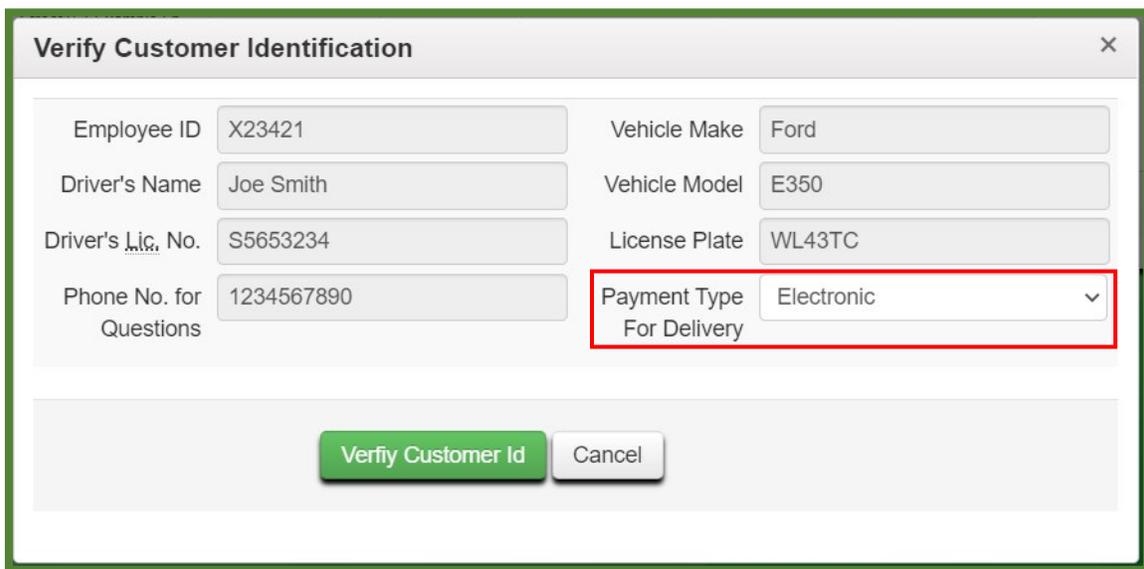


Figure 12: Verify ID Action Window & Payment Type

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**.

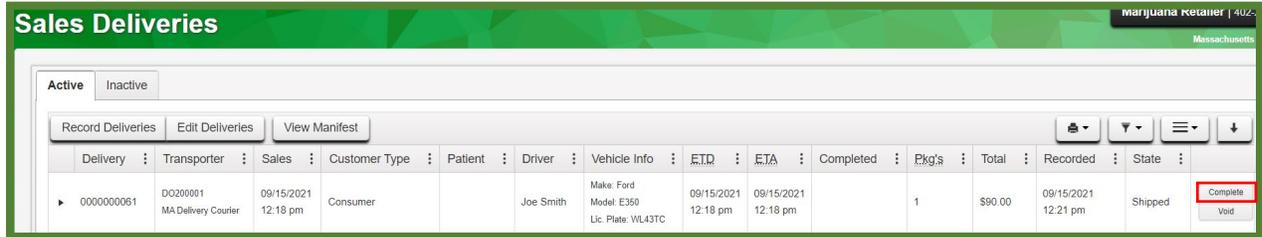


Figure 13: Complete Sales Delivery

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**.

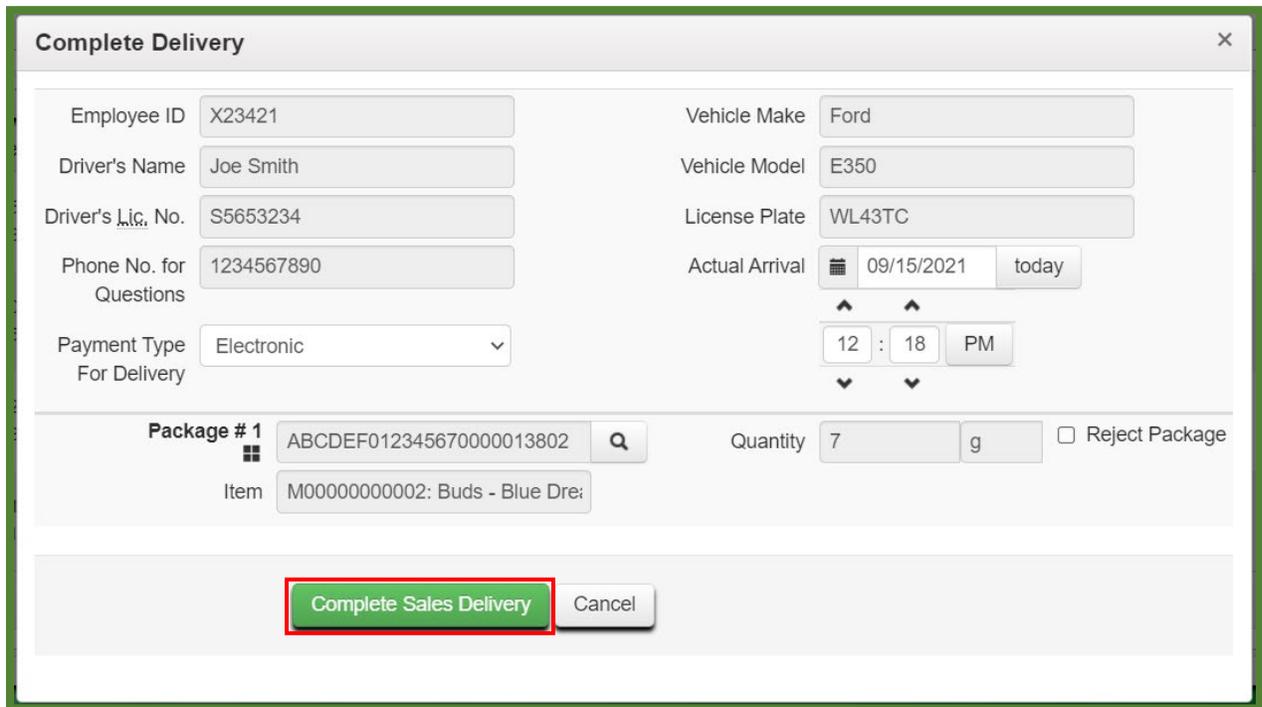


Figure 14: Complete Sales Delivery Action Window

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**.

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

- Employee ID: X23421
- Driver's Name: Joe Smith
- Driver's Lic. No.: S5653234
- Phone No. for Questions: 1234567890
- Payment Type For Delivery: Electronic
- Vehicle Make: Ford
- Vehicle Model: E350
- License Plate: WL43TC
- Actual Arrival: 09/15/2021 (today) 12:18 PM
- Est. Return Departure: today 12:34 PM
- Est. Return Arrival: today 12:34 PM

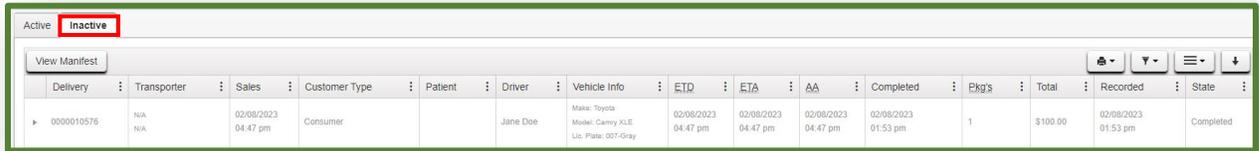
A red box highlights the package details:

- Package # 1: ABCDEF012345670000013802
- Item: M00000000002: Buds - Blue Dre;
- Quantity: 7 g
- Verification: 7 Grams
- Return Reason: Undeliverable
- Optional Note: No answer at the door
- Reject Package

Buttons at the bottom: Complete Sales Delivery, Cancel

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**.



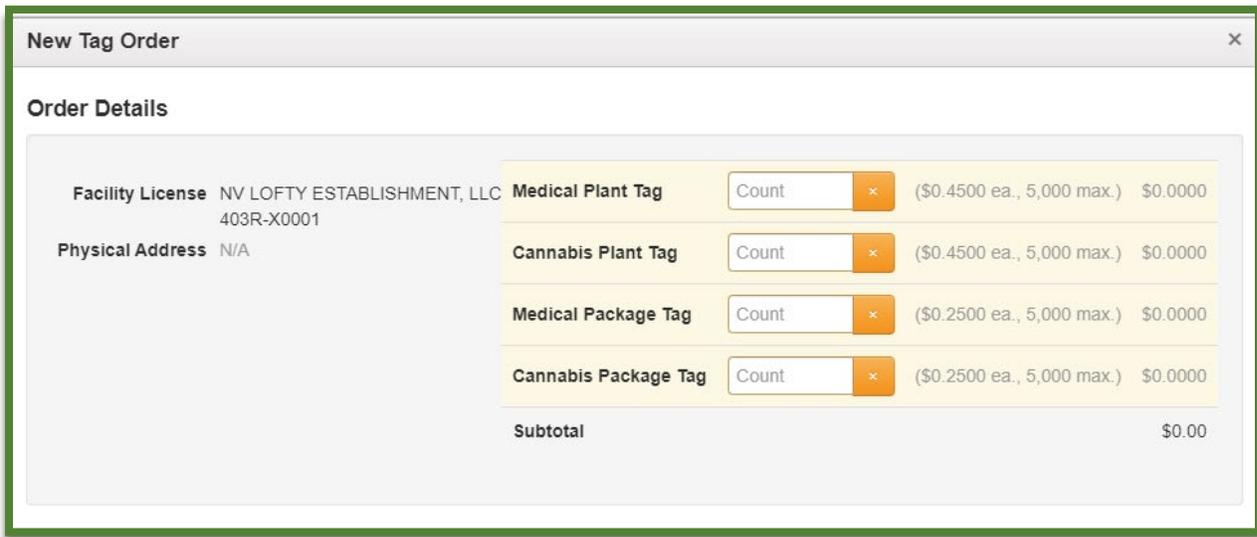
Active Inactive														
View Manifest														
Delivery	Transporter	Sales	Customer Type	Patient	Driver	Vehicle Info	ETD	ETA	AA	Completed	Elgs	Total	Recorded	State
0000010576	N/A N/A	02/08/2023 04:47 pm	Consumer		Jane Doe	Make: Toyota Model: Camry XLE Lic. Plate: 007-Gray	02/08/2023 04:47 pm	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	Completed

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**.



Order Details	
Facility License NV LOFTY ESTABLISHMENT, LLC 403R-X0001	Medical Plant Tag <input type="text" value="Count"/> <input type="button" value="x"/> (\$0.4500 ea., 5,000 max.) \$0.0000
Physical Address N/A	Cannabis Plant Tag <input type="text" value="Count"/> <input type="button" value="x"/> (\$0.4500 ea., 5,000 max.) \$0.0000
	Medical Package Tag <input type="text" value="Count"/> <input type="button" value="x"/> (\$0.2500 ea., 5,000 max.) \$0.0000
	Cannabis Package Tag <input type="text" value="Count"/> <input type="button" value="x"/> (\$0.2500 ea., 5,000 max.) \$0.0000
	Subtotal \$0.00

Figure 16: New Tag Order Action Window

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