

Bulletin Number: DC_IB_0055	Distribution Date: 07/28/2023	Effective Date: 09/2/2023
Contact Point: Metrc Support	Subject: New feature updates and manufacturer guidance	
Topic: To provide information on the latest feature release and best practices.		

Greetings,

Metrc is pleased to provide information on the latest system enhancements planned to deploy on September 2, 2023, including:

Sales Delivery Hub

Enhancements made to improve workflows within the Sales Delivery Hub function in Metrc and to enhance the Sales Delivery Hub functionality for retailer licensees that utilize a third-party integrator.

Additionally, Metrc has collaborated with ABCA to provide the following guidance, tailored for D.C. Manufacturer users:

Metrc Training for Manufacturers

New Business and Advanced Manufacturing courses are available through Metrc Learn for new and returning users.

Transfers to Vertically Integrated Facilities

Guidance for businesses who need to transfer packages through Metrc to another license located at the same physical location.

Please read on for more information.

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 I.D. 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 the 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 – **see Figure 1**.

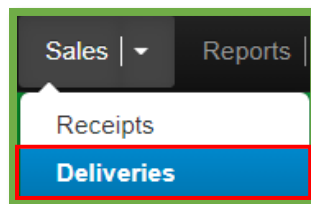


Figure 1: Sales Menu with Deliveries Option

Important 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 – **see Figure 2.**

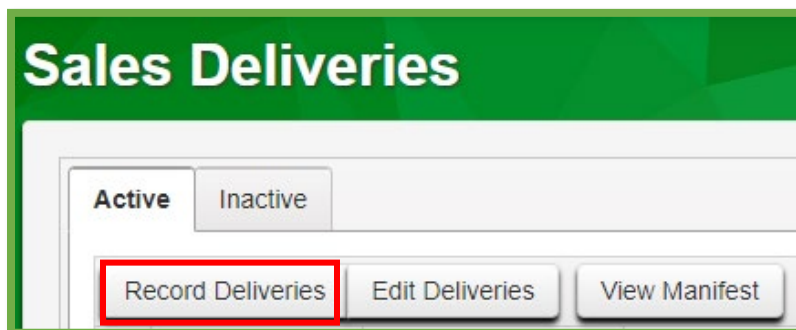
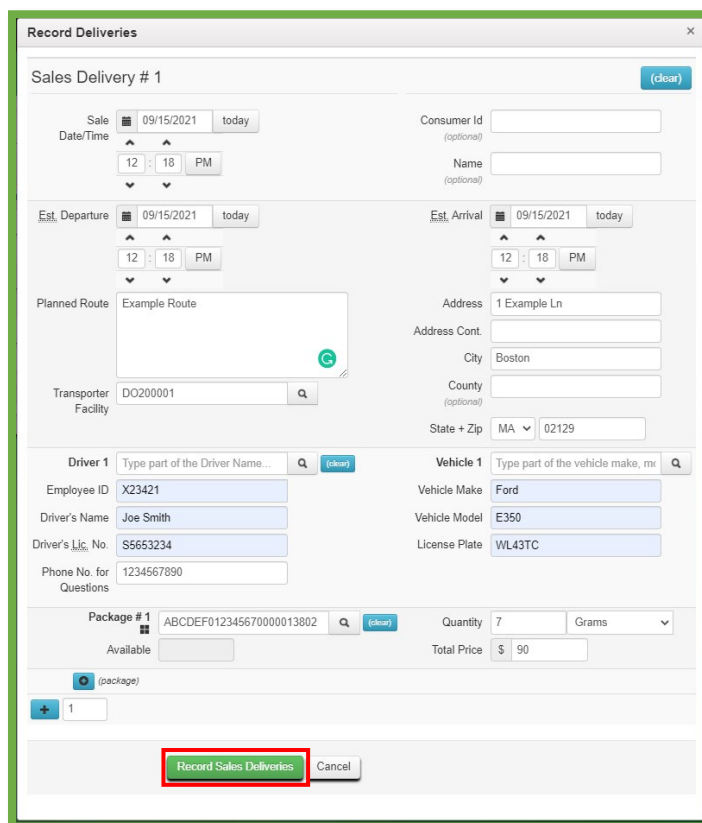


Figure 2: Record Deliveries button

In the Record Deliveries action window that appears, enter the details of the Sales Delivery, which now offers the ability to assign the license that will be physically delivering the sale if it differs from the Retailer’s license.

After all required information is entered, select the “Record Sales Deliveries” button to complete the sales delivery creation process – **see Figure 3.**


 A screenshot of the 'Record Deliveries' form. The form is titled 'Record Deliveries' and has a close button (X) in the top right corner. It contains several sections for data entry:

- Sales Delivery # 1**: A text field with a '(clear)' button.
- Sale Date/Time**: A date/time picker set to 09/15/2021 at 12:18 PM.
- Consumer Id**: A text field labeled '(optional)'.
- Name**: A text field labeled '(optional)'.
- Est. Departure**: A date/time picker set to 09/15/2021 at 12:18 PM.
- Est. Arrival**: A date/time picker set to 09/15/2021 at 12:18 PM.
- Planned Route**: A text area with 'Example Route' and a green location pin icon.
- Transporter Facility**: A text field with 'D0200001' and a search icon.
- Address**: A text field with '1 Example Ln'.
- Address Cont.**: A text field.
- City**: A text field with 'Boston'.
- County**: A text field labeled '(optional)'.
- State + Zip**: A dropdown menu showing 'MA' and a text field with '02129'.
- Driver 1**: A section with a search field 'Type part of the Driver Name...' and a '(clear)' button. Below it are fields for 'Employee ID' (X23421), 'Driver's Name' (Joe Smith), 'Driver's Lic. No.' (S5653234), and 'Phone No. for Questions' (1234567890).
- Vehicle 1**: A section with a search field 'Type part of the vehicle make, m...' and a search icon. Below it are fields for 'Vehicle Make' (Ford), 'Vehicle Model' (E350), and 'License Plate' (WL43TC).
- Package # 1**: A section with a search field 'ABCDEF012345670000013802' and a '(clear)' button. Below it are fields for 'Quantity' (7) and 'Total Price' (\$ 90).
- Available**: A text field.
- (package)**: A button with a plus icon and a dropdown menu.
- Record Sales Deliveries**: A button highlighted with a red rectangular border.
- Cancel**: A button.

Figure 3: Alternate Delivery License

After the sales delivery is created by the Retailer license, 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 toolbar – see **Figure 4**.

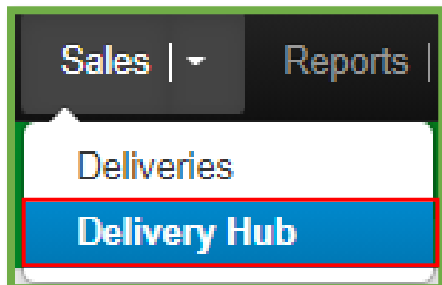


Figure 4: Navigate to Delivery Hub

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 retailer's facility, the delivery can be accepted by using the "Accept" button – see **Figure 5**.

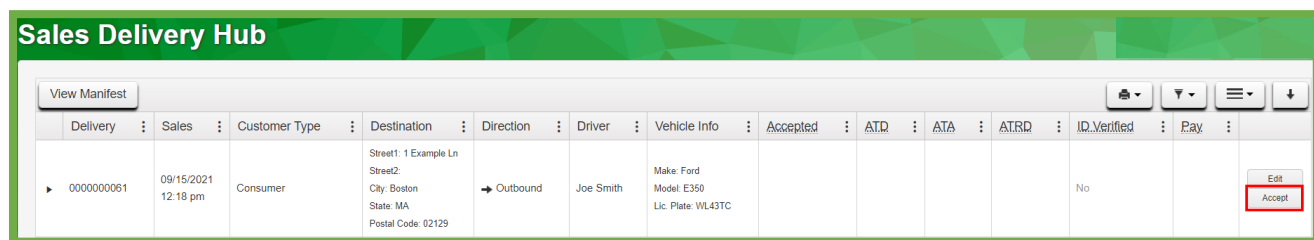


Figure 5: Accept Sales Delivery

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

The screenshot shows the 'Sales Delivery Hub' interface. At the top is a 'View Manifest' button. Below it is a table with columns: Delivery, Sales, Customer Type, Destination, Direction, Driver, Vehicle Info, Accepted, ATD, ATA, ATRD, ID.Verified, Pay, and an 'Edit' button. The first row of data shows a delivery ID of 0000000061, a sales date of 09/15/2021 at 12:18 pm, a consumer customer type, an outbound direction, driver Joe Smith, a Ford E350 vehicle with license plate WL43TC, an accepted date of 09/15/2021 at 12:28 pm, and an 'ID.Verified' status of 'No'. The 'Depart' button is highlighted with a red box.

Figure 6: Mark Departure from Retailer Facility

When making a delivery, the end recipient's I.D. must be verified. Once I.D. verification is confirmed, the "Verify ID" button should be used – see **Figure 7**.

This screenshot is similar to Figure 6, but the 'Verify ID' button is highlighted with a red box instead of the 'Depart' button. The data in the table is the same, showing a delivery record for a consumer customer, outbound direction, and a Ford E350 vehicle.

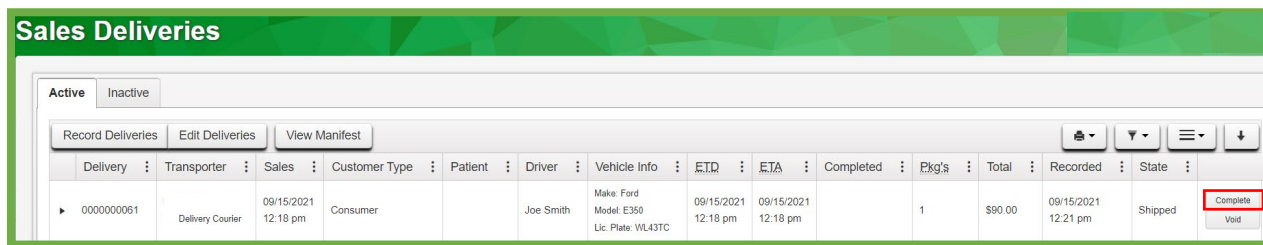
Figure 7: Verify I.D. of Recipient

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

The screenshot shows the 'Verify Customer Identification' action window. It contains several input fields: Employee ID (X23421), Driver's Name (Joe Smith), Driver's Lic. No. (S5653234), Phone No. for Questions (1234567890), Vehicle Make (Ford), Vehicle Model (E350), and License Plate (WL43TC). The 'Payment Type For Delivery' dropdown is highlighted with a red box and is set to 'Electronic'. At the bottom are 'Verify Customer Id' and 'Cancel' buttons.

Figure 8: Verify ID Action Window & Payment Type

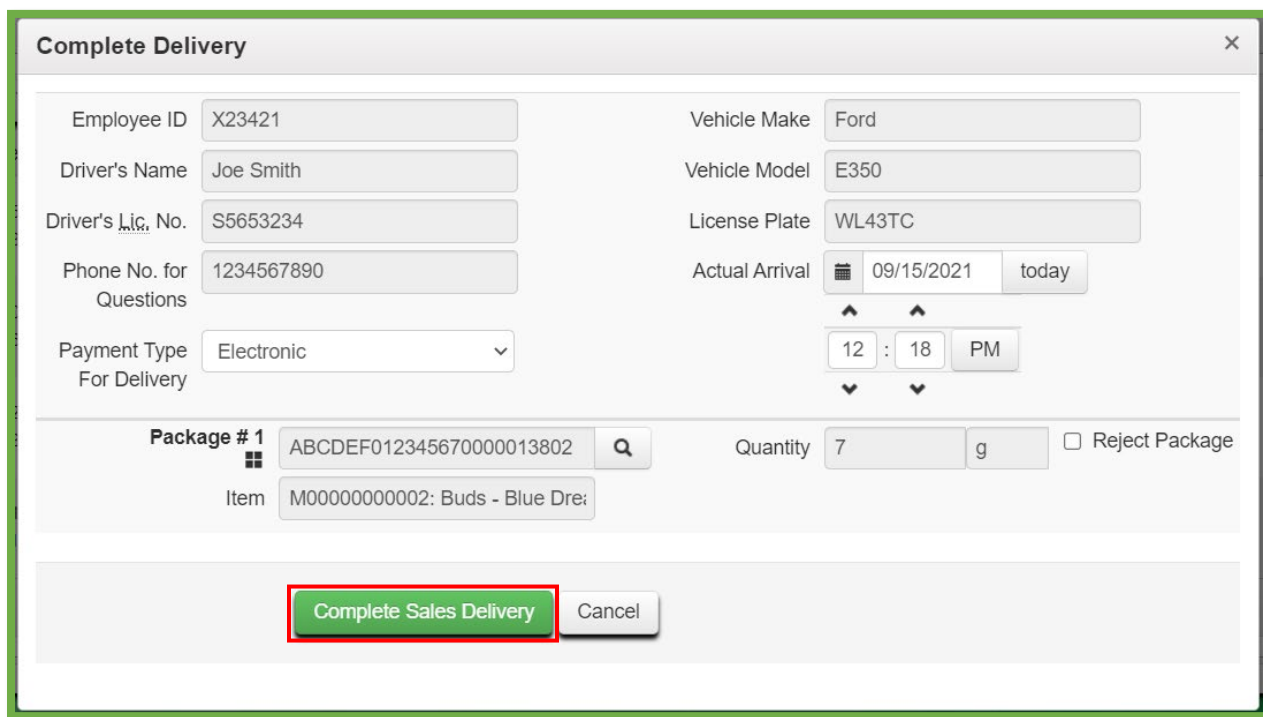
Once this process is completed by the transporter, the Retailer license should complete the sales delivery in their license by selecting the “Complete” button in the Sales Deliveries grid – see **Figure 9**.



Delivery	Transporter	Sales	Customer Type	Patient	Driver	Vehicle Info	ETD	ETA	Completed	Pkg's	Total	Recorded	State	
0000000061	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 9: 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 – see **Figure 10**.



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

Package # 1

ABCDEF012345670000013802

Quantity

7

g

☐ Reject Package

Item

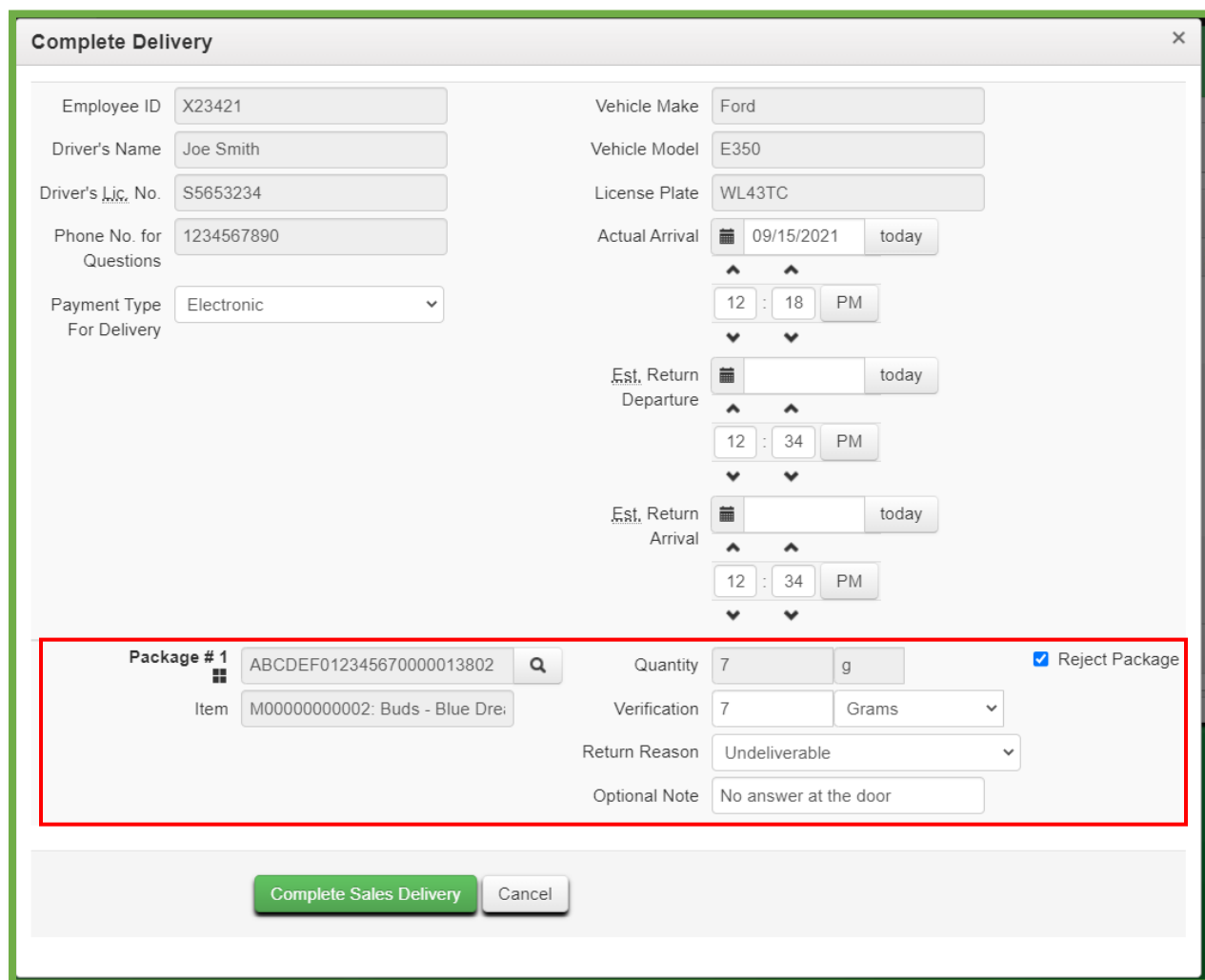
M00000000002: Buds - Blue Dre:

Complete Sales Delivery

Cancel

Figure 10: Complete Sales Delivery Action Window

If the sales delivery was unable to be completed, the “Reject Package” checkbox should be used, a return reason should be selected from the Return Reason dropdown, and additional details provided in the Optional Note text box – see **Figure 11**.



Complete Delivery

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

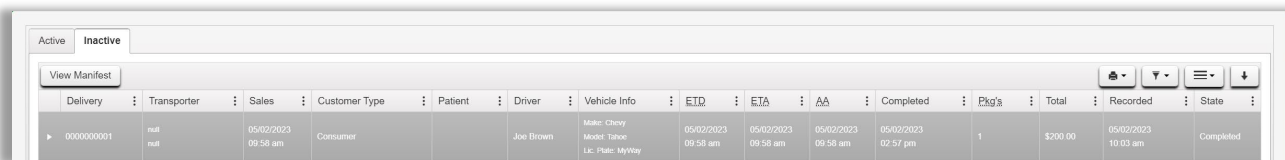
Actual Arrival: 09/15/2021 today
 12 : 18 PM
 Est. Return Departure: today
 12 : 34 PM
 Est. Return Arrival: today
 12 : 34 PM

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

Complete Sales Delivery Cancel

Figure 11: Rejected Sales Delivery Action Window

Once completed, the delivery will be finalized and automatically moved to the “Inactive” tab in the Sales Deliveries grid – see **Figure 12**.



Delivery	Transporter	Sales	Customer Type	Patient	Driver	Vehicle Info	ETD	ETA	AA	Completed	Pkg/s	Total	Recorded	State
0000000001	met	05/02/2023 09:58 am	Consumer		Joe Brown	Make: Chevy Model: Tahoe Lic. Plate: MyWay	05/02/2023 09:58 am	05/02/2023 09:58 am	05/02/2023 09:58 am	05/02/2023 02:57 pm	1	\$200.00	05/02/2023 10:03 am	Completed

Figure 12: Inactive Deliveries tab

Designating Transfers to Vertically Integrated Licenses

When a Metrc Transfer is created for a Destination license located at the same physical location, and where no Driver and Vehicle transport are necessary, this is known as a “Walking Transfer”. **Note the following:**

- The employee delivering the product will be entered as the Driver, along with their badge and driver's license number for identification purposes.
- “Walking” should be noted in all requested vehicle information on the manifest.
- The originating license number will be entered in the “Transporter” field.

Example: When needing to transfer a package in Metrc from a Cultivation license to a Manufacturing license located in the same building, a Walking Transfer would be used – see **Figure 17**.

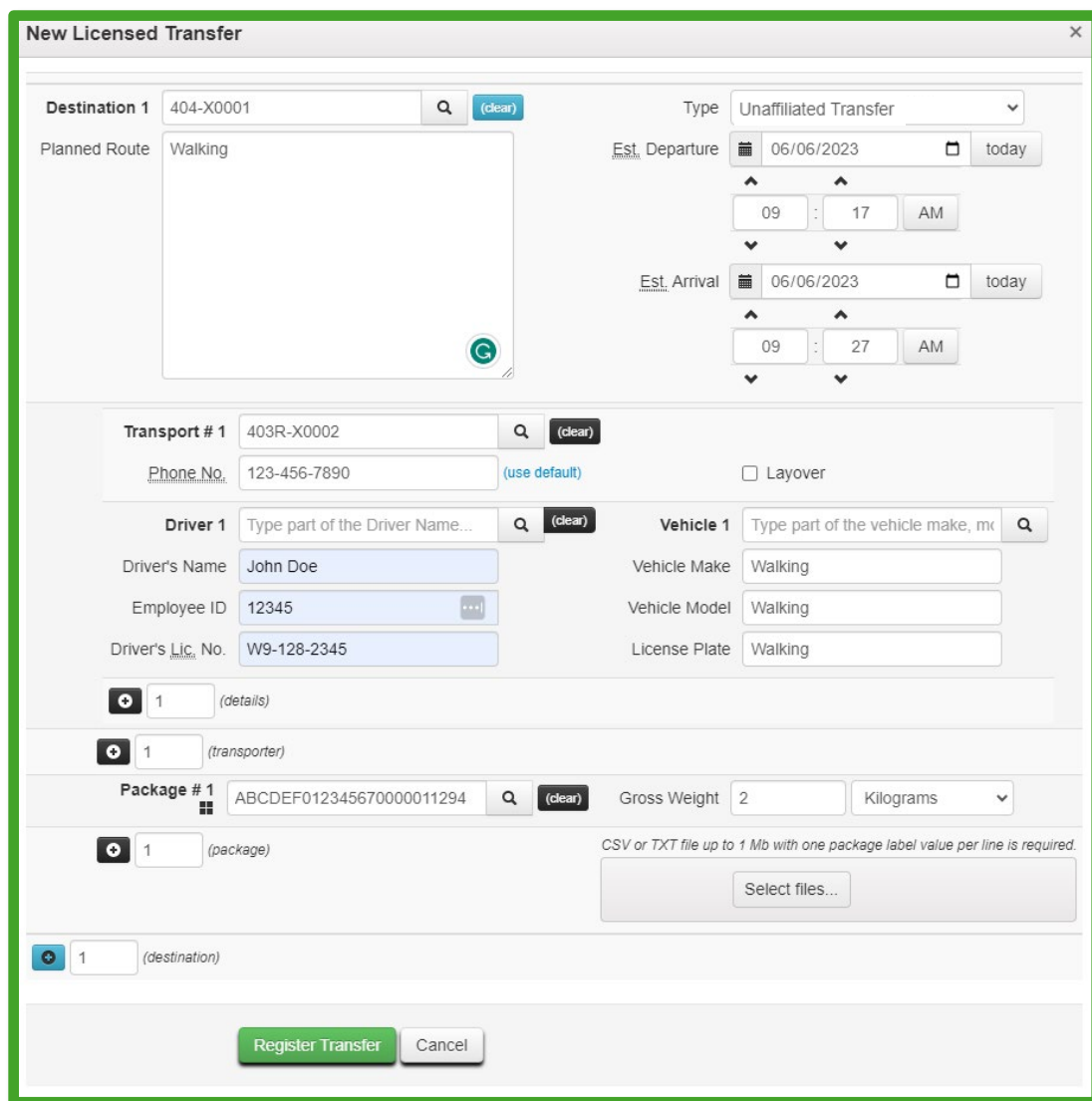


Figure 17: New Licensed Transfer window, used to create a Walking Transfer.

Metrc Learn Training

Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options based on experience level. In addition, the learning system is organized into facility-specific programs made up of various courses.

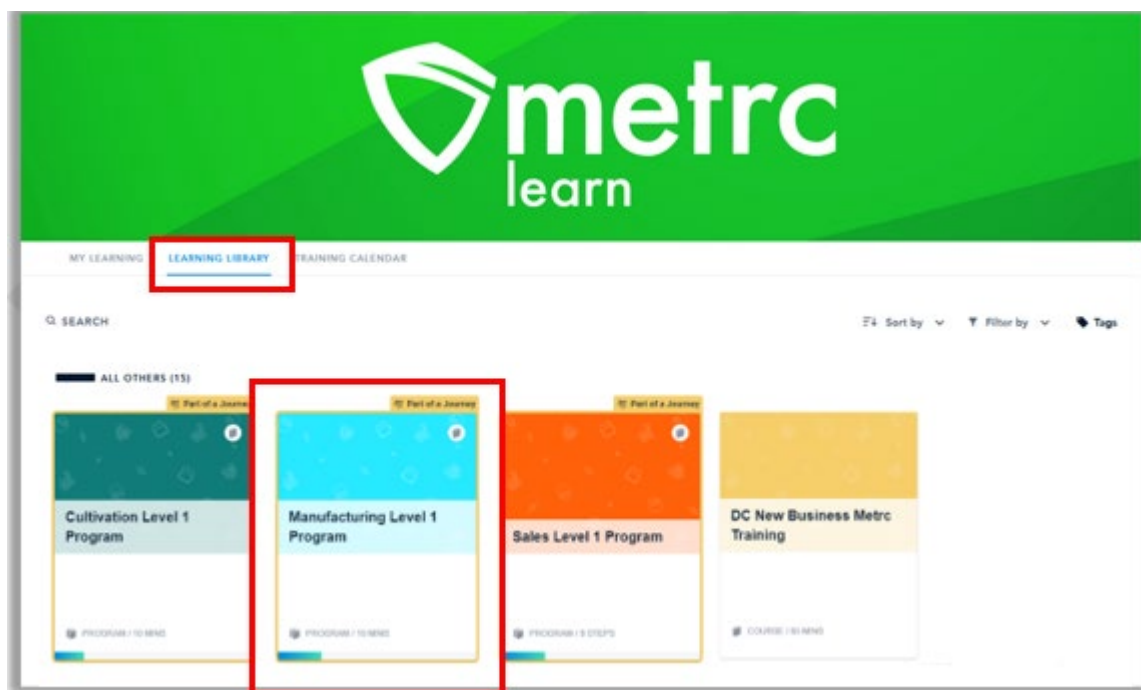
Recommendation: Users who are operating under a D.C. Manufacturer license should enroll in the Manufacturing Program through Metrc Learn.

Important note: To access Metrc training, [Metrc Learn registration](#) is required. See below instructions on how to register for a Metrc Learn account for more information.

On-demand training

To access on-demand training including the New Business, Advanced trainings, and role-specific courses, take the following steps:

1. Navigate to [Metrc Learn](#) and enter login credentials.
2. Select "Learning Library" from the navigation bar.
3. Enroll in the preferred training module(s).
4. After clicking 'Enroll' for the desired training, it will then be available in the second, 'Added By You', row of the My Learning page.



Need to register for Metrc Learn?

To register for Metrc Learn, please take the following steps:

- Navigate to the [Metrc Learn Registration](#) page – see **Figure 18**.
- Enter the required information and click on the 'Create Account' button.
 - **Note:** Please allow up to 48 hours (Monday – Friday) for registration approval to be granted.
- Upon approval of active Metrc Learn status, an email invitation will be sent to the email provided to set a password.
 - **Note:** If working in multiple licenses, enter all licenses on the lines provided, and then select the license type that reflects the area of the role requesting access to Metrc training.

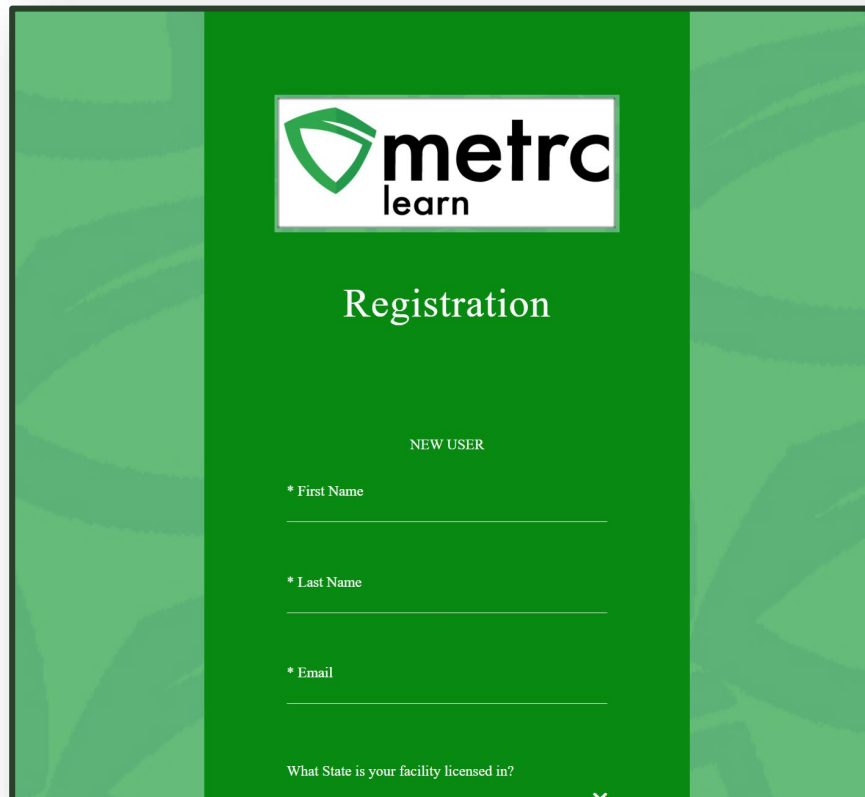
The image shows a screenshot of the Metrc Learn Registration page. The page has a green background with a white central column. At the top of the white column is the Metrc Learn logo, which consists of a green shield icon and the text 'metrc learn'. Below the logo, the word 'Registration' is written in a large, white, serif font. Underneath 'Registration', the text 'NEW USER' is displayed in a smaller, white, sans-serif font. Below this, there are three input fields, each preceded by an asterisk and a label: '* First Name', '* Last Name', and '* Email'. Each input field is a simple white line. At the bottom of the white column, there is a dropdown menu with the text 'What State is your facility licensed in?' and a small downward arrow icon.

Figure 18: Metrc Learn Registration page

Additional Resources and Metrc Support

Additional resources, such as educational guides, are readily available in the Metrc system. Simply click on the “Support” dropdown in the top-right navigation pane and select the appropriate resource. Metrc Learn and the Metrc Knowledge Center may also be accessed using these links – **see Figure 19**.

The Metrc Knowledge Center is a portal that provides on-demand access to various resource materials including past bulletins and helpful links. This center is designed to be a supplemental resource to Metrc Support, providing options for self-assistance.

Metrc Support can also be reached via phone, email, or live chat through the Metrc system or by referencing the information below.



Figure 19: Metrc system – Access additional resources and/or Metrc Support

Thank you for your continued partnership. Please reach out to Metrc Support with questions.