Metrc Support Bulletin

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.

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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**.
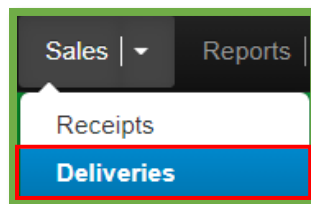
Figure 1: Sales Menu with Deliveries Option

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

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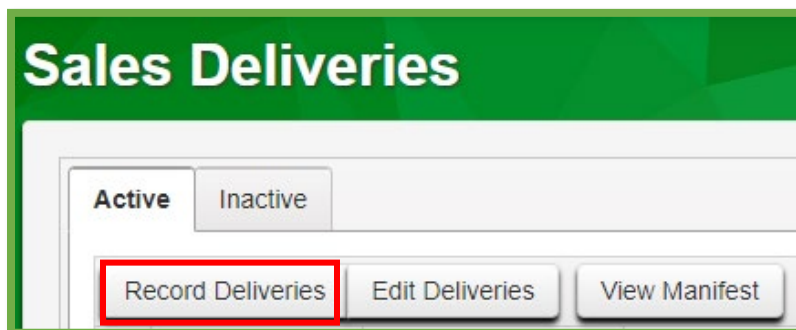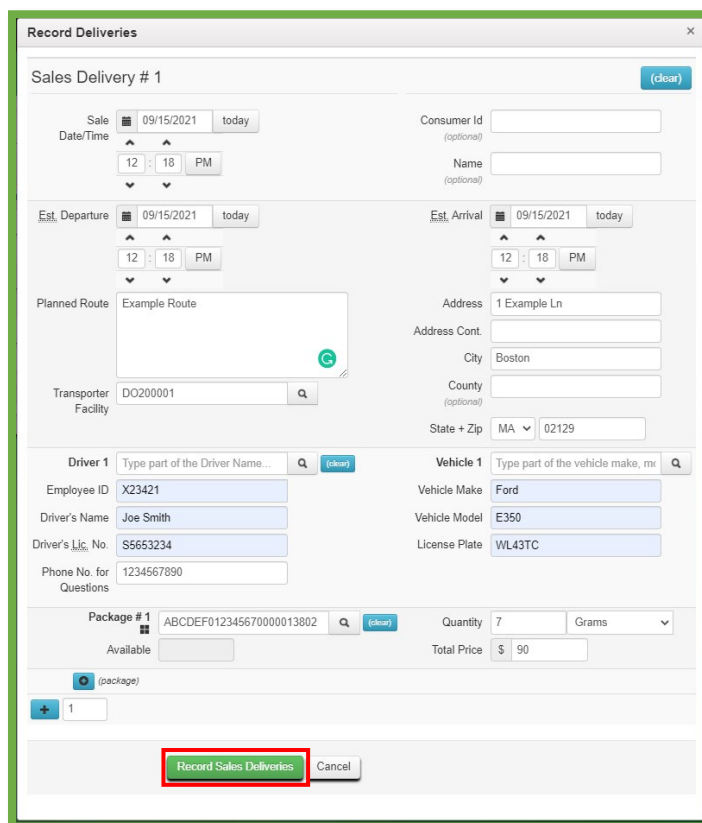

Figure 2: Record Deliveries button

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**.

Figure 3: Alternate Delivery License

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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**.
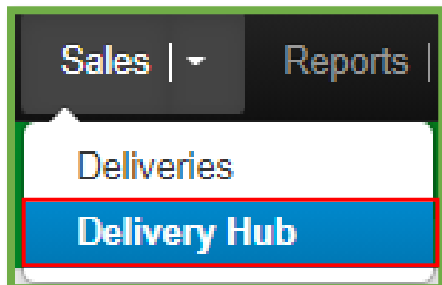

Figure 4: Navigate to Delivery Hub

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 <u>cannot</u> 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**.
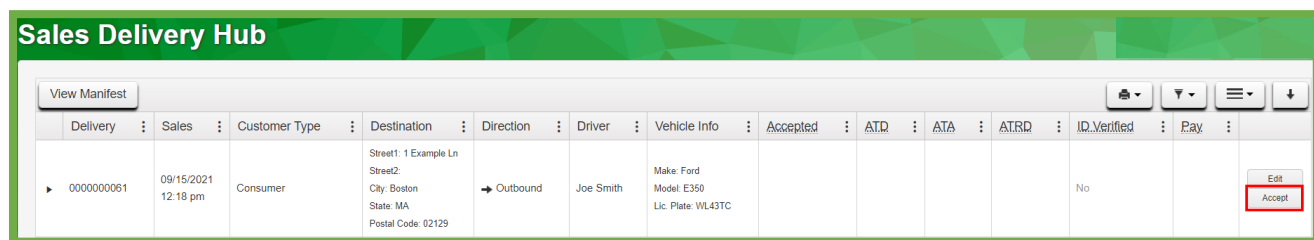

Figure 5: Accept Sales Delivery

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

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**.
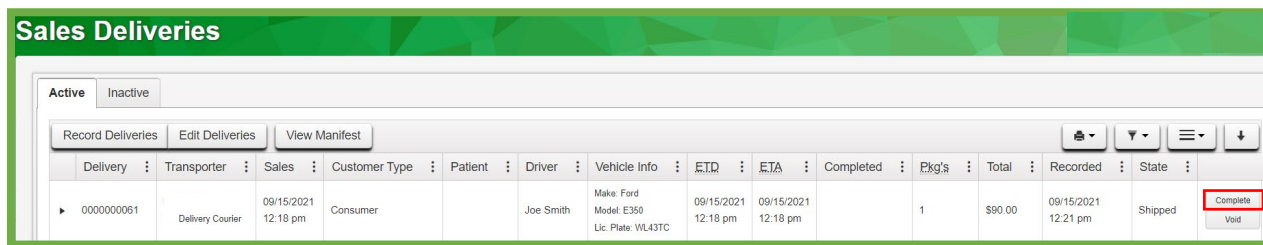

Figure 7: Verify I.D. of Recipient

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**.

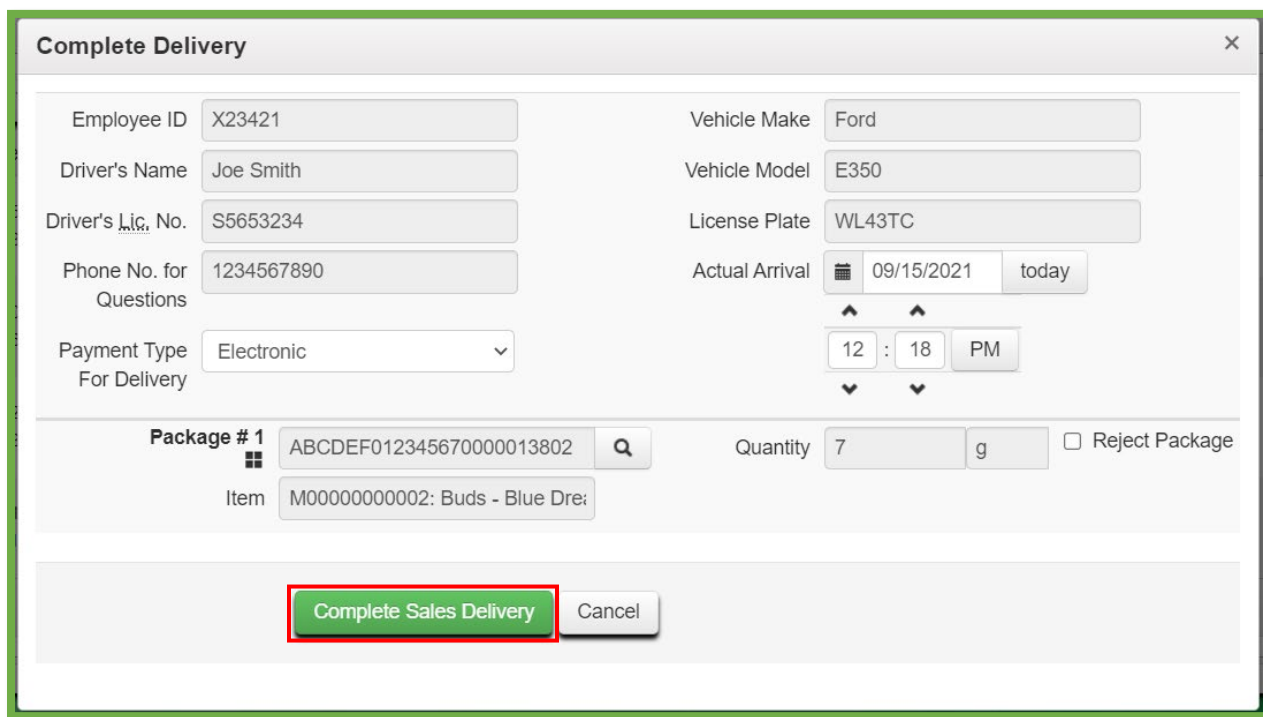**Figure 8: Verify ID Action Window & Payment Type**

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**.

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**.
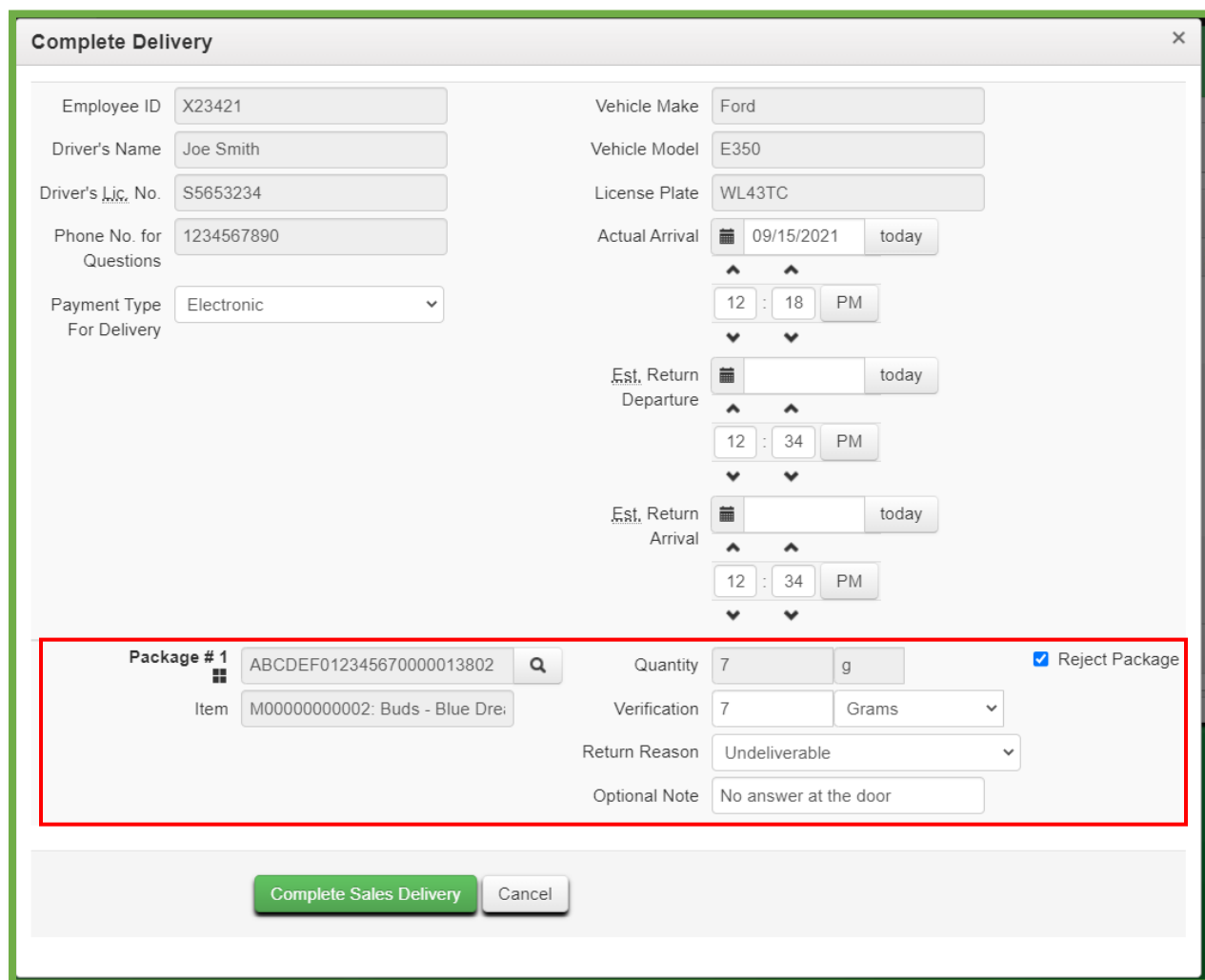
Figure 10: Complete Sales Delivery Action Window

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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**.
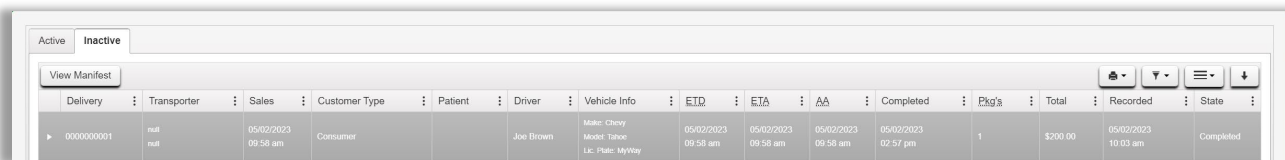
Figure 11: Rejected Sales Delivery Action Window

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

Figure 12: Inactive Deliveries tab

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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 notated 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.**
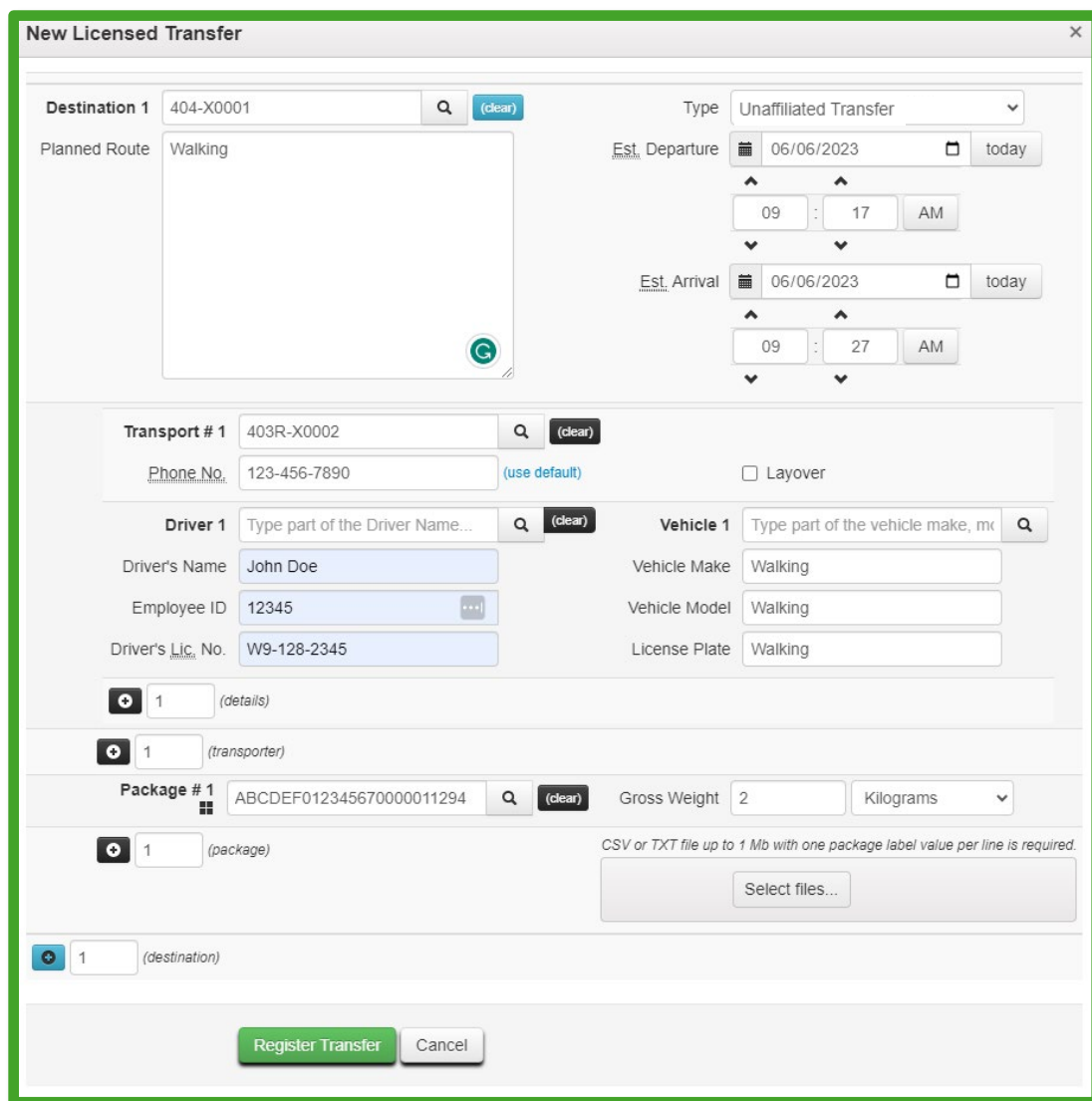

Figure 17: New Licensed Transfer window, used to create a Walking Transfer.

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![metrc logo]

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.

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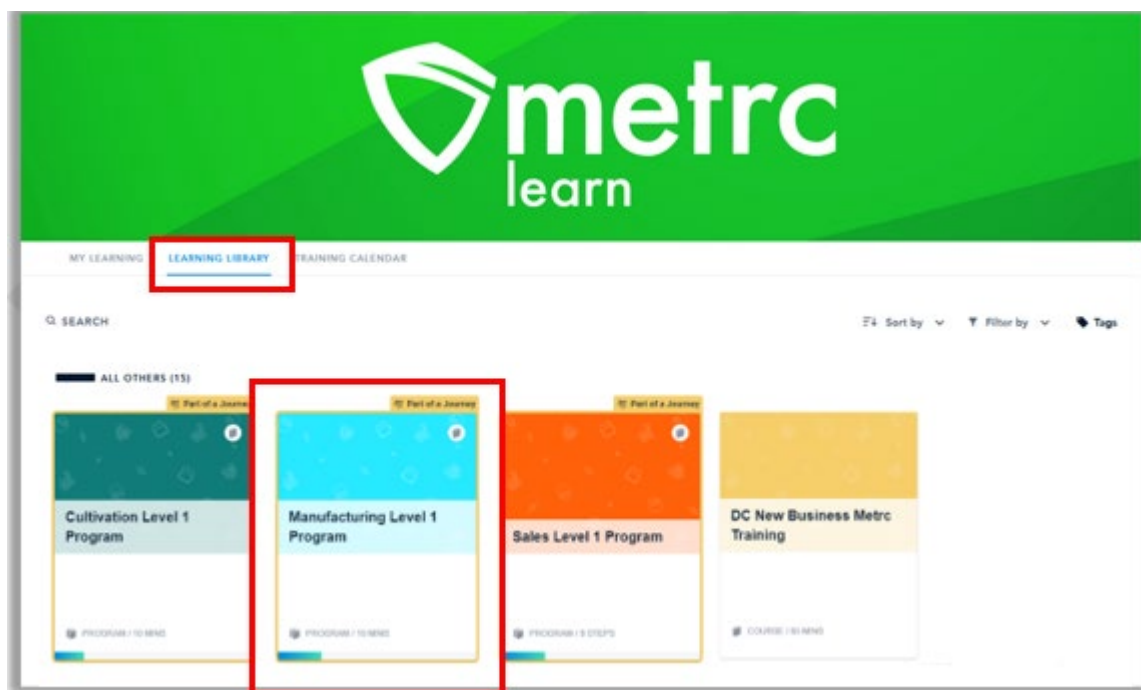
Need to register for Metrc Learn?

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.
  - o **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.
  - o **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.
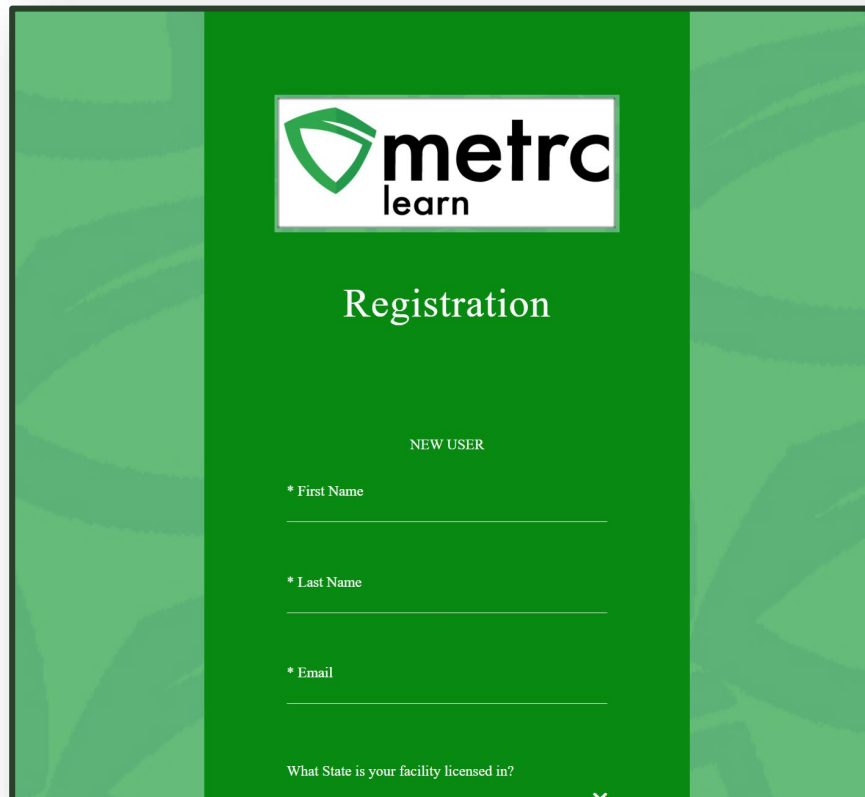

Figure 18: Metrc Learn Registration page

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.

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