

| Bulletin Number:<br>RI_IB_0021  | Distribution Date : 2/20/2024    | Effective Date:<br>3/4/2024 |
|---|----------------------------------|-----------------------------|
| Contact Point: Metrc Support  | Subject: Billing functionality e | enhancements in Metrc       |
| <b>Reason:</b> Provide an update on Administrators more visibility interview. |                                  |                             |

#### Greetings,

Metrc values our relationship, takes pride in supporting the success of licensed business operations, and recognizes that to remain compliant with all license requirements, it is important that access to financial documentation, account status information, and easier payment options be more readily available.

Based on valuable feedback received from licensees across the markets we serve, Metrc is excited to announce the launch of new system enhancements related to account financials and billing functionality.

The following Metrc system functionality will be available to licensees in the state of Rhode Island starting on 3/4/2024:

- Financial permissions
- Real-time account status
- Invoice availability in the Invoice grid

Please read on for more information regarding this new functionality.



## **Financial permissions**

Historically, upon credentialing a new license in the Metrc system, the first Admin added to the account defaults as the financial point of contact. While this default setting will not change, the Admin will now have the ability to designate additional financial points of contact, or backup administrators with financial permissions, for payment purposes.

To designate one or more additional financial points of contact, navigate to the Admin drop-down in the navigational toolbar and select the Employees option to access the Employees Grid – **see Figure 1**.

| mployee                    | es                   |                        |                                   |                  | Tag Orders<br>Tags    |   |         |
|----------------------------|----------------------|------------------------|-----------------------------------|------------------|-----------------------|---|---------|
| Add Licensed Er            | nployees Add U       | nlicensed Employe      | es Edit Employees L               | .ock Unic        | Locations<br>Strains  | - |         |
|                            |                      |                        |                                   |                  |                       |   |         |
| License No.                | Last Name            | First Name             | E-mail                            | Status           | Items                 | : | Expires |
| License No. :<br>Aaron0101 | Last Name :<br>Aaron | First Name :<br>Marcus | E-mail :<br>Marcus.Aaron@test.com | Status<br>Active | Items<br>Transporters |   | Expires |
|                            | •                    | •                      | E-mail :                          |                  |                       |   | Expires |

## Figure 1: Employees Grid

Highlight the employee to be edited, then select the Edit Employees button – **see** Figure 2.

| Smetrc Plant    | ts   <del>•</del> Packa | ges   👻 Transfei    | rs I ▼ Financials I ▼  | Reports   <del>-</del> | Admin 👻    |
|-----------------|-------------------------|---------------------|------------------------|------------------------|------------|
| Employee        | es                      |                     |                        |                        |            |
| Add Licensed En | nployees Ado            | d Unlicensed Employ | vees Edit Employees    | Lock Uni               | ock        |
| License No.     | Last Name               | First Name          | E-mail                 | : Status               | Туре       |
| Aaron0101       | Aaron                   | Marcus              | Marcus.Aaron@test.com  | Active                 | Unlicensed |
| Adams0101       | Adams                   | John                | John.Adams@test.com    | Active                 | Unlicensed |
| Alexander0101   | Alexander               | Joe                 | Joe.Alexander@test.com | Active                 | Unlicensed |

## Figure 2: Edit Employees button



In the Edit Employees action window, there are three areas that determine the level of access an employee can have to financial information – **see Figure 3**.

**Financial contact at this facility:** Selecting this checkbox designates the employee as a financial point of contact at the licensee's facility.

**Financials Menu > All – Manage:** Selecting this checkbox allows the employee to access all three areas of Financials: Credit Cards, Financial Summary, and Invoices.

**Financials Menu > Invoices – View:** Selecting this checkbox allows the employee to view the Invoices grid only.

| Edit Employee                              | 25   |       |             |  |   |   |
|--|--|-------|-------------|--|---|---|
| Employee #                                 | ¥ 1  |       |             |  |   | (clear)   |
| Employee<br>Employee <u>Lig.</u><br>Number | Marcus Aaron<br>Aaron0101  | *     | Permissions | Plants Page<br>Immeture Plants<br>Grids (reg'd)<br>Inventory   | ☑ View<br>Manage  | Lofty Rec-Producer A   4a-x0001     Mishmash Rec-MFG X   5a-x0001     Mishmash Rec-Prod'r   4a-x0003  |
|  | Enable online access to this Fact Marcus.Aaron@test.com     Resend Welcome E-mail     Plants | ity   |             | Inventory<br>Destroy<br>Veg/Flower Plants<br>Grids (m(g'd)<br>Inventory<br>Destroy<br>Manicure/Harvest     | Nanage<br>Manage<br>View<br>Manage<br>Manage<br>Manage                              | Larger Rec-WHSLR 1   060-X0001     Larger Rec-WHSLR 2   060-X0002     Lofty Rec-Producer B   020-X0002     Lofty Rec-Store 52   050-X0001     Lofty Rec-Store 56   050-X0002     Mishmash Rec-MFG X   030-X0001                             |
| Employment                                 | Owner at this Facility Manager at this Facility Financial Contact at this Facility           |       |             | Additives<br>All<br>Waste<br>All<br>Harvests<br>Grids ( <u>reg'si</u> )<br>Inventory<br>Finish/Discontinue | View Manage<br>View Manage<br>View Manage<br>Manage<br>Manage                       | Institution Reconstruction     Mishmash Rec-MFG Z   030-x0002     Mishmash Rec-MFG Z   030-x0003     Perceptive Labs   016-x000     Pondering Stone Research II   040-x00     Pondering Stone Research II   040-x00     Check at Check none |
|  |  |       |             | Packages Page<br>Grids (reg(d)<br>Inventory<br>Create/Submit/Disc,<br>Notes<br>Transfers Menu              | <ul> <li>View</li> <li>Manage</li> <li>Manage</li> <li>Manage</li> </ul>            |   |
|  |  |       | ſ           | Licensed & External<br>Templates<br>Trips Menu<br>All<br>Financials Menu<br>All                            | Manage     Manage     View      Manage     Manage                                   |   |
|  |  |       | ί           | Invoices<br>Reports Menu<br>All<br>Admin Menu  | View  |   |
|  |  |       |             | Tag Orders<br>Tags<br>Locations<br>Strains<br>Hems<br>Transporters<br>Employees                            | Manage     Manage     Manage     Manage     Manage     Manage     Manage     Manage |   |
| + 1  |  |       |             |  |   |   |
|  | Save Employees C   | ancel | J           |  |   |   |

#### Figure 3: Edit Employees action window and financial permissions

Follow the same steps above to designate permissions for each individual employee.



## **Invoices grid**

Once this new functionality is released, monthly invoices for standard reporting fees will be accessible in the Metrc system, including open and closed invoices, which can be viewed and/or managed by employees with appropriate financial permissions through the Invoices grid.

To access the Invoices grid, click on the Financials dropdown in the navigational toolbar and select the Invoices option – **see Figure 4**.

| ♥metrc         Plants   ▼         Packages   ▼         Transfers   ▼ | Financials   - Reports   - Admin -       |
|--|--|
| Invoices   | Credit Cards<br>Financial Summary        |
| Open Closed  | Please select a tab to view its content. |
|  |  |

#### Figure 4: Navigating to the Invoices grid

To view open invoices with unpaid balances, select the Open tab. In Open Invoices, the Invoice Number, Coverage Period, Invoice Date, Status, Due Date, Term, Balance, Price will be visible, along with Invoice and Payment action buttons – **see Figure 5**.

When the Payment action button is selected, the Credit Card action window will appear.

For more information, review the 'Payment options reminder' section of this bulletin.

| nvoices                  |     |                    |   |              |   |           |   |            | ~ |              |     |        | Lofty F          | Rec-Producer A   4a- |
|--------------------------|-----|--------------------|---|--------------|---|-----------|---|------------|---|--------------|-----|--------|------------------|----------------------|
| Open Closed              |     |                    |   |              |   |           |   |            |   |              |     |        |                  |                      |
| Invoice Number           | :   | Coverage Period    | : | Invoice Date | : | Status    | : | Due Date   | : | Term         | : в | alance | Price            | <b>+</b>             |
| MP-WV-0000054321-2024-01 |     | January 2024       |   | 01/01/2024   |   | Uncharged |   | 01/01/2024 |   | January 2024 | s   | Amount | \$ Amount        | Invoice<br>Payment   |
| 🛪 4 🚺 Page 1 of 1        | ь н | 20 v rows per page |   |              |   |           |   |            |   |              |     |        | Viewing 1 - 1 (1 | total) 🔿 🕇           |

Figure 5: Open Invoices grid



To view closed invoices with fully paid balances, select the Closed tab. While the Closed Invoices grid will look like the Open Invoices grid, the only difference will be the absence of the Payment button and the list of paid invoices will be visible – **see Figure 6**.

| 10  | ices                     |   |                 |     |              |   | <      |   |            |   |                |          |    | Lofty Rec-Pro          | ducer A   4a<br>E |
|-----|--------------------------|---|-----------------|-----|--------------|---|--------|---|------------|---|----------------|----------|----|------------------------|-------------------|
| Оре | n Closed                 |   |                 |     |              |   |        |   |            |   |                |          |    |                        |                   |
|     |                          |   |                 |     |              |   |        |   |            |   |                |          | L. | a- Y- ≣                | • +               |
|     | Invoice Number           | : | Coverage Period | 1   | Invoice Date | : | Status | : | Due Date   | E | Term           | : Baland | 0  | Price I                |                   |
| •   | MP-WV-0000034512-2023-11 |   | November 2023   |     | 11/01/2023   |   | Paid   |   | 11/01/2023 |   | November 2023  | \$0.00   |    | \$ Amount              | invoice           |
| ,   | MP-WV-0000012345-2023-09 |   | September 2023  |     | 09/01/2023   |   | Paid   |   | 09/01/2023 |   | September 2023 | \$0.00   |    | s Amount               | Invoice           |
| ٠   | MP-WV-0000023451-2023-10 |   | October 2023    |     | 10/01/2023   |   | Paid   |   | 10/01/2023 |   | October 2023   | \$0.00   |    | s Amount               | Invoice           |
|     | MP-WV-0000051234-2023-12 |   | December 2023   |     | 12/01/2023   |   | Paid   |   | 12/01/2023 |   | December 2023  | \$0.00   |    | \$ Amount              | Invoice           |
|     | A 1 Page 1 of 1          |   | 20 • rows per p | 202 |              |   |        |   |            |   |                |          | V  | iewing 1 - 4 (4 total) | 0 +               |

Figure 6: Closed Invoices grid

To view paid invoice details from the Closed Invoices grid, click the dropdown arrow in the proper Invoice Number row to expand paid invoice details – **see Figure 7.** 

|       |                      |    |                 |             |            |                |        |        |                 |       |                     |        | e            | <u></u>    | - +     |
|-------|----------------------|----|-----------------|-------------|------------|----------------|--------|--------|-----------------|-------|---------------------|--------|--------------|------------|---------|
| Invoi | ce Number            | :  | Coverage Period | :           | Invoice Da | te :           | Status | 1      | Due Date        | :     | Term                | Balan  | ce i         | Price :    |         |
| MP-W  | V-0000054321-2024-01 |    | January 2024    |             | 01/01/2024 |                | Paid   |        | 01/01/2024      |       | January 2024        | \$0.00 |              | § Amount   | Invoice |
| MP-W  | V-0000034512-2023-11 |    | November 2023   |             | 11/01/2023 |                | Paid   |        | 11/01/2023      |       | November 2023       | \$0.00 |              | s Amount   | Invoice |
| MP-W  | V-0000012345-2023-09 |    | September 2023  |             | 09/01/2023 |                | Paid   |        | 09/01/2023      |       | September 2023      | \$0.00 |              | \$ Amount  | Invoice |
| MP-W  | V-0000023451-2023-10 |    | October 2023    |             | 10/01/2023 |                | Paid   |        | 10/01/2023      |       | October 2023        | \$0.00 |              | \$ Amount  | Invoice |
| MP-W  | V-0000051234-2023-12 |    | December 2023   |             | 12/01/2023 |                | Paid   |        | 12/01/2023      |       | December 2023       | \$0.00 |              | \$ Amount  | Invoice |
| 7     | License Number       | 4  | a-X0001         |             | Facility   | LOFTY ESTABLIS | HMENT, |        | Invoice Number  | MP-WV | -0000051234-2023-12 |        | Invoice Date | 12/01/2023 |         |
|       | Outstanding Amount   |    | \$0.00          |             | Price      | \$ Amou        |        |        | Tax             |       | \$ Amount           |        | Total Charge | \$ Amo     | unt     |
|       | Due Date             |    | /01/2023        |             | yments     | s Amou         | unt    |        | Status          |       | Paid                |        |              |            |         |
|       | Invoice Type         |    | orting Fee      | Tag Order I |            |                |        | System | n Action Reason | 5     | ScheduledBilling    |        | Sub Reason   |            |         |
|       | Start Date           | 12 | /01/2023        | E           | nd Date    | 12/31/2023     |        |        | Note            |       |                     |        |              |            |         |

Figure 7: View closed invoice Details

In addition to invoice details, additional information can be found by selecting the Assignments and History tabs – **see Figures 8 and 9 below.** 

# 

| E | ayment No. | Net Applied | Tx. Date            | Туре         | Payment Type | Payment Amount | : | Status            | : | Description                     | <br>▼ • E • | <u> </u> |
|---|------------|-------------|---------------------|--------------|--------------|----------------|---|-------------------|---|---------------------------------|-------------|----------|
| - | 5q64tbb    | s           | 01/24/2024 01:15 pm | ReportingFee | Credit Card  | N/A            |   | Partially Applied |   | Charge for Outstanding Invoices | \$ Amount   |          |

#### Figure 8: View closed invoice Assignments

| Payment No. |   |             |   |            |   |                 |   |            |   |      |   |              |   |              | ė٠ | ▼•  ≡•         | + |
|-------------|---|-------------|---|------------|---|-----------------|---|------------|---|------|---|--------------|---|--------------|----|----------------|---|
| Leomeourse. | : | Applied     | : | Date       | : | Reason          | : | SubReason  | : | Note | ÷ | Туре         | : | Payment Type | :  | Payment Amount |   |
| 85q64tbb    |   | \$ Amount   |   | 01/24/2024 |   | Reporting Fee   |   |            |   |      |   | ReportingFee |   | Credit Card  |    | N/A            |   |
| 85q64tbb    |   | (\$ Amount) |   | 01/24/2024 |   | Billing Error   |   | Rate Error |   |      |   | ReportingFee |   | Credit Card  |    | N/A            |   |
| 85q64tbb    |   | \$ Amount   |   | 01/24/2024 |   | PaymentAssigned |   |            |   |      |   | ReportingFee |   | Credit Card  |    | N/A            |   |

#### Figure 9: View closed invoice History

To view, download, and/or print a closed (paid) invoice, click on the Invoice button for the proper Invoice Number row in the far right – **see Figure 10**.

| ivo | ices                     |   |                    |   |              |   |          |    |           |       |           |       |        | -     | Lofty Rec-Pro   | ducer / | A   4a-X<br>EK |
|-----|--------------------------|---|--------------------|---|--------------|---|----------|----|-----------|-------|-----------|-------|--------|-------|-----------------|---------|----------------|
| Ope | n Closed                 |   |                    |   |              |   |          |    |           |       |           |       |        |       |                 |         |                |
|     |                          |   |                    |   |              |   |          |    |           |       |           |       |        | a - 1 | <b>▼</b> •    ≡ | •       | +              |
|     | Invoice Number           | ÷ | Coverage Period    | : | Invoice Date | 1 | Status I | D  | ue Date I | Term  | 1         | Bal   | ance I | Pri   |                 |         | _              |
|     | MP-WV-0000034512-2023-11 |   | November 2023      |   | 11/01/2023   |   | Paid     | 11 | 1/01/2023 | Nover | mber 2023 | \$0.0 | 0      | s A   | mount           | invos   | ok             |
|     | MP-WV-0000012345-2023-09 |   | September 2023     |   | 08/01/2023   |   | Paid     | 09 | N01/2023  | Septe | mber 2023 | \$0.0 | 0      | \$ /  | Amount          | Invol   | ce             |
|     | MP-WV-0000023451-2023-10 |   | October 2023       |   | 10/01/2023   |   | Paid     | 10 | 0/01/2023 | Octob | xer 2023  | \$0.0 | 0      | s /   | Amount          | INVOR   | ce             |
|     | MP-WV-0000051234-2023-12 |   | December 2023      |   | 12/01/2023   |   | Paid     | 12 | 2/01/2023 | Decer | mber 2023 | \$0.0 | 0      | \$ /  | Amount          | Invol   | ce-            |
| 14  | 4 1 Page 1 of 1 >        | н | 20 • rows per page |   |              |   |          |    |           |       |           |       | Vie    | ewina | 1 - 4 (4 total) | 0       | +              |

Figure 10: Access closed (paid) invoice to view, download, and/or print



# Invoices overview

The information provided below is important to understand as it relates to invoices, including what will be visible, or may be visible, depending on account status.

- Beginning on the first day of the next full calendar month, an invoice will be generated in the Open invoices tab in the Invoices grid and show the total amount due for that period, including the Metrc reporting fee and any applicable taxes as defined by state and local taxing authorities.
- The generation of a monthly invoice will automatically occur in the system on the first day of every month.
- Sales tax assessment is enabled, so Metrc will now be able to calculate applicable sales tax on the monthly reporting fee.

For periods prior to the release of this new functionality, the following will apply:

- For previously <u>paid</u> periods (balances are paid in full), invoices will not be retroactively created or show up in the Closed Invoices tab of the Invoices grid.
- For previously <u>unpaid</u> periods, a single invoice will be generated that reflects the entire amount owed to Metrc at the time of this functionality release and will appear in the Open Invoices tab of the Invoices grid. See example invoice below.

| Metrc, LLC 3111 W Pipkin Rd Suite 140 Lakeland, FL 33811 1-877-566-6506 Support@metrc.com MP-DEMO-QAE3BR- 000000003-2024-01 TERMS: Due upon receipt BILL TO: LICENSE #: LICENSE   |                   |                       |                      |  | etrc.<br>VOICE |
|---|-------------------|-----------------------|----------------------|--|----------------|
| Suite 140<br>Lakeland, FL 33811<br>1-877-566-6506<br>Support@metrc.com<br>MP-DENO-QAE3BR-<br>000000003-2024-01<br>TERMS:<br>Due upon receipt<br>BILL TO:<br>LICENSE #:  | Metrc, LLC        |                       |                      |  |                |
| Lakeland, FL 33811       INVOICE #:         1-877-566-6506       MP-DEMO-QAE3BR-<br>0000000003-2024-01         TERMS:       Due upon receipt         BILL TO:       LICENSE #:         Monthly Reporting Fee       1/1/2023 - 1/31/2024       \$ Amount         1       Monthly Reporting Fee       1/1/2023 - 1/31/2024       \$ Amount         Sales Tax Adjustment:       \$ Amount         Invoice Subtotal:       \$ Amount         Sales Tax Adjustment:       \$ Amount         Invoice Subtotal:       \$ Amount         Sales Tax Adjustment:       \$ Amount         Payment Received:       \$ Amount  |                   |                       |                      | DATE: Jar                              | nuary 22, 2024 |
| TERMS:       Due upon receipt         BILL TO:       LICENSE #:         Image: Comparison of the second of the  | 1-877-566-6506    |                       |                      |  |                |
| Due upon receipt BILL TO: LICENSE #: Description Cuantity Description Date Unit Price Total I Monthly Reporting Fee 1/1/2023 - 1/31/2024 \$ Amount Sales Tax djustment Sales Tax djustment Novice Due \$ Amount Novice Due \$ Amount Payment Received: \$ Amount Payment Paymen | Support@metrc.com |                       |                      |  |                |
| BILL TO:<br>LICENSE #<br><u>Quantity Description Date Unit Price Total</u><br>1 Monthly Reporting Fee 1/1/2023 - 1/31/2024 § Amount § Amount<br>Sales Tax djustment: § Amount<br>Sales Tax djustment: § Amount<br>Invoice Dute § Amount<br>Payment Received: § Amount   | TERMS:            |                       |                      |  |                |
| Quantity         Description         Date         Unit Price         Total           1         Monthly Reporting Fee         1/1/2023 - 1/31/2024         \$ Amount         \$ Amount           Sales Tax         \$ Amount         Sales Tax         \$ Amount           Invoice Subtotal:         \$ Amount         Sales Tax         \$ Amount           Invoice Due:         \$ Amount         Sales Tax Adjustment:         \$ Amount           Invoice Due:         \$ Amount         Payment Received:         \$ Amount   | Due upon receipt  |                       |                      |  |                |
| 1 Monthly Reporting Fee 1/1/2023 - 1/31/2024 \$ Amount \$ Amount<br>Invoice Subtotal: \$ Amount<br>Sales Tax: \$ Amount<br>Sales Tax Adjustment: \$ Amount<br>Invoice Due: \$ Amount<br>Invoice Due: \$ Amount<br>Payment Received: \$ Amount   | BILL TO:          |                       |                      | LICEN                                  | SE #:          |
| 1 Monthly Reporting Fee 1/1/2023 - 1/31/2024 \$ Amount \$ Amount<br>Invoice Subtotal: \$ Amount<br>Sales Tax: \$ Amount<br>Sales Tax Adjustment: \$ Amount<br>Invoice Due: \$ Amount<br>Invoice Due: \$ Amount<br>Payment Received: \$ Amount   | 0.00              |                       |                      |  |                |
| Invoice Subtotal: \$ Amount<br>Sales Tax: \$ Amount<br>Sales Tax Adjustment: \$ Amount<br>Invoice Due: \$ Amount<br>Payment Received: \$ Amount   | Quantity          | Description           | Date                 | Unit Price                             | Total          |
| Sales Tax: \$ Amount<br>Sales Tax Adjustment: \$ Amount<br>Invoice Due: \$ Amount<br>Payment Received: \$ Amount  | 1                 | Monthly Reporting Fee | 1/1/2023 - 1/31/2024 | \$ Amount                              | \$ Amount      |
| Sales Tax Adjustment: \$Amount<br>Invoice Due: \$Amount<br>Payment Received: \$Amount   |                   |                       |                      | Invoice Subtotal:                      | \$ Amount      |
| Invoice Due: \$ Amount<br>Payment Received: \$ Amount   |                   |                       |                      | Sales Tax:                             | \$ Amount      |
| Payment Received: \$ Amount   |                   |                       | Sale                 | ,                                      | •              |
|   |                   |                       |                      |  |                |
|   |                   |                       |                      | Payment Received:<br>Final Amount Due: | S Amount       |



**Important note:** Access to invoices, and the ability to download and/or print, will be available from the Invoices grid. Direct access will offer greater efficiencies, including real-time ability to view and/or manage invoices in a singular location and limit incoming or outgoing communications to/from Metrc.

**Recommendation:** Designate additional financial managers so that all appropriate employees can access invoices and/or make payments.

## **Financial Summary**

If payments are received in advance of monthly reporting fees being due or an approved credit is issued by Metrc, the new Financial Summary grid will offer real-time account status into Available Credits.

To access the Financial Summary grid, go to the Financials dropdown in the navigational toolbar and select the Financial Summary option – **see Figure 11**.

| $\Diamond$ | metrc Plar             | nts   🕶 🛛 I | Package | es   <del>-</del> Tran   | sfer | s   🕶 | Financials   -  | Repor  | ts   🕶 | Admi | n 🕶 |         |
|------------|------------------------|-------------|---------|--------------------------|------|-------|-----------------|--------|--------|------|-----|---------|
| E          | Employees              |             |         |                          |      |       | Credit Cards    |        |        |      |     |         |
|            | Linployees             |             |         |                          |      |       | Financial Summa |        |        |      |     |         |
|            |                        |             |         |                          |      |       | Invoices        |        |        |      |     |         |
|            | Add Licensed Employees |             |         | Add Unlicensed Employees |      |       | Edit Employees  | Unlock |        |      |     |         |
|            | License No.            | Last Nan    | ne :    | First Name               | :    | E-ma  | ail :           | Stat   | us :   | Туре | :   | Granted |

## Figure 11: Navigating to the Financial Summary grid

The Available Credits in the Financial Summary grid will display any available credits that are available to apply to future monthly Metrc fees. If the account is up to date, Available Credits will display \$0.00. The Financial Summary page will not display late payments or negative amounts – **see Figure 12**.

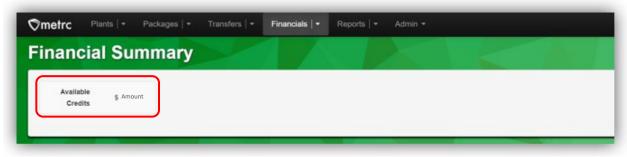


Figure 12: Available Credits in Financial Summary grid



# **Payment options reminder**

Maintaining a valid payment method on file to pay for all incurred and recurring Metrc fees will simplify payment processes. Two payment options are available:

#### Pay by credit card – Recommended

To review, update, or add a credit or debit card, select the Financials dropdown in the navigational toolbar, then select Credit Cards – **see Figure 13**.

| redit Cards            |                 | Credit Cards<br>Financial Summary |         |         |   |            |   | 1.000         | AK Lofty Rec-Producer A   4a-X0001 ×<br>ESO 3 QA |
|------------------------|-----------------|-----------------------------------|---------|---------|---|------------|---|---------------|--|
| Add Credit Card        |                 | Invoices                          |         |         |   |            |   |               | [▼•][≡•] +]                                      |
| Number                 | : c             | : Cardholder :                    |         | Expired | : | Tag Orders | : | Reporting Fee | i  |
| VISA 411111******1111  | blahbert bilbob |                                   | 12/2030 | No      |   |            |   | Active        | Cancel   |
| ( + ( + 1) Page 1 of 1 | (F)(F)          | 20 • rows per page                |         |         |   |            |   |               | Viewing 1 - 1 (1 total) Ö                        |
|                        | _               |                                   | _       |         |   |            |   |               |  |
|                        |                 |                                   |         |         |   |            |   |               |  |

Figure 13: Credit Cards grid

To add a new card for one or more facilities, select the Add Credit Card button to open the Add Credit Card action window. Complete all required information, including selection of facilities to receive the same credit card details and checkbox option(s) to use the credit card for Industry Reporting Fees going forward, or availability for Tag Orders, if enabled. When complete, click the Save Credit Card button – **see Figure 14**.

| Name on Ca  | rd                   |   |   |            |        |   |  |  |  |
|-------------|----------------------|---|---|------------|--------|---|--|--|--|
| Card Numb   | er                   |   | Address Cont.   |            |        |   |  |  |  |
|             |                      |   |   |            |        |   |  |  |  |
| Exp. MM/YYY | m [                  | /   | City  |            |        |   |  |  |  |
| Security Co | de                   |   | State + Zip   | ***        | ~      |   |  |  |  |
|             |                      |   |   |            |        |   |  |  |  |
| Facilities  |                      |   | eckbox below will receive the same Cred                       |            |        |   |  |  |  |
|             | includ               | Lofty Rec-Produce                         | ry Reporting Fee and availability for Tag<br>r A   4a-X0001 ✔ | Orders, if | enable | 1 |  |  |  |
|             |                      | Mishmash Rec-MF                           | G X   5a-X0001 🖌  |            |        |   |  |  |  |
|             |                      | Mishmash Rec-Prod'r   4a-X0003 🗸          |   |            |        |   |  |  |  |
|             |                      | Larger Rec-WHSL                           | R 1   060-X0001 🖌   |            |        |   |  |  |  |
|             |                      | Larger Rec-WHSLR 2   050-X0002 🛩          |   |            |        |   |  |  |  |
|             |                      | Lofty Rec-Producer B   020-X0002 🗸        |   |            |        |   |  |  |  |
|             |                      | Lofty Rec-Store 52   050-X0001 🗸          |   |            |        |   |  |  |  |
|             |                      | Lofty Rec-Store 56   050-X0002            |   |            |        |   |  |  |  |
|             |                      | Mishmash Rec-MF                           |   |            |        |   |  |  |  |
|             |                      | Mishmash Rec-MFG Z   030-x0002 🗸          |   |            |        |   |  |  |  |
|             |                      | Mishmash Rec-Prod'r   020-X0003 🖌         |   |            |        |   |  |  |  |
|             |                      | Perceptive Labs   010-X0001 🗸             |   |            |        |   |  |  |  |
|             |                      | Pondering Stone Research I   040-X0001 🖌  |   |            |        |   |  |  |  |
|             |                      | Pondering Stone Research II   040-X0002 🗸 |   |            |        |   |  |  |  |
|             | Check all Check none |   |   |            |        |   |  |  |  |
|             |                      |   | ting Fee going forward  |            |        |   |  |  |  |

Figure 14: Add Credit Card action window



In addition, payments can be made via check or money order and sent to the following address:

Metrc LLC 3111 West Pipkin Rd., Suite 140 Lakeland, FL 33811

## **Metrc resources**

If you have any questions, or need additional support, the following resources are available:

**Contact Metrc Support** by using the new full-service system – Service Cloud – by navigating to <u>Support.Metrc.com</u>, or from the Metrc System, click Support and navigate to support.metrc.com and it will redirect to the portal.

*Please note*: If accessing the portal for the first time, a username (which is established when logging in), the respective state and "Facility license number", and a valid email to set a password is required. For additional information, please review the <u>step-by-step</u> <u>guide</u> or a <u>video demo</u>.

**Metrc Learn:** 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. To login, visit <u>Metrc Learn</u> and enter your login credentials, or to access, register by visiting the <u>Metrc Learn Registration</u>.

**Access additional resources:** In the Metrc system, click on the Support dropdown in the top-right navigation pane and select the appropriate resource, including educational guides, manual, and more.

Thank you for your continued partnership.