Metrc Support Bulletin

Bulletin Number: MD_IB_0080	Distribution Date: UPDATED 04/24/2024	Effective Date: Ongoing
Contact Point: Metrc Support	**Subject:** Billing revamp and CSV queue import functionality	
Reason: Provide an update on new billing functionality in the Metrc system that will offer Administrators more visibility into account financial status as it relates to Metrc fees. Provide an update on new CSV queue import functionality in the Metrc system that will make uploads more efficient.		

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 MD starting on 3/18/2024:

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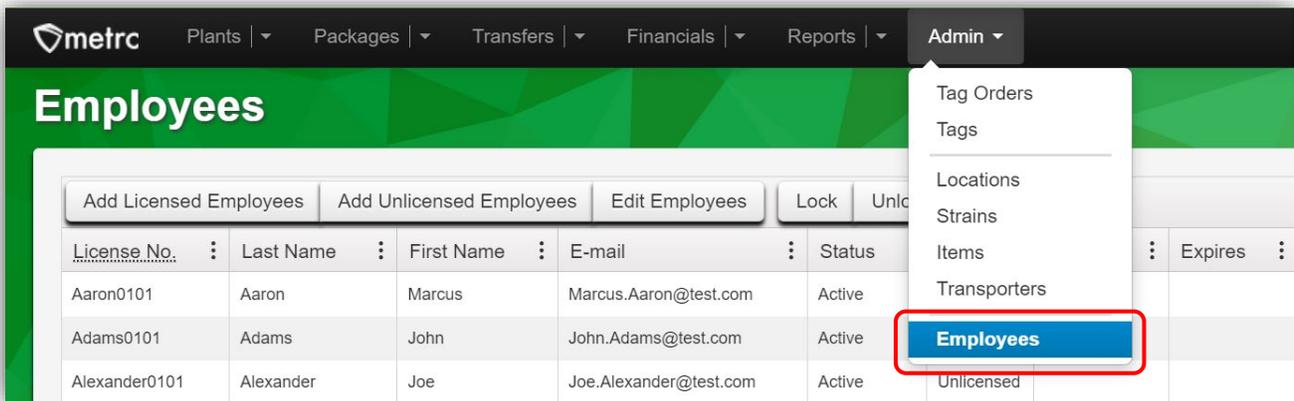- Invoice availability in the Invoice grid

Metrc is also providing information about an updated CSV data import function that is now available for users in the platform. To deliver a more efficient experience with the Metrc system, legacy functionality will no longer be supported starting on April 30th, 2024, and the updated functionality will need to be used.

Please read on for more information regarding this new functionality.

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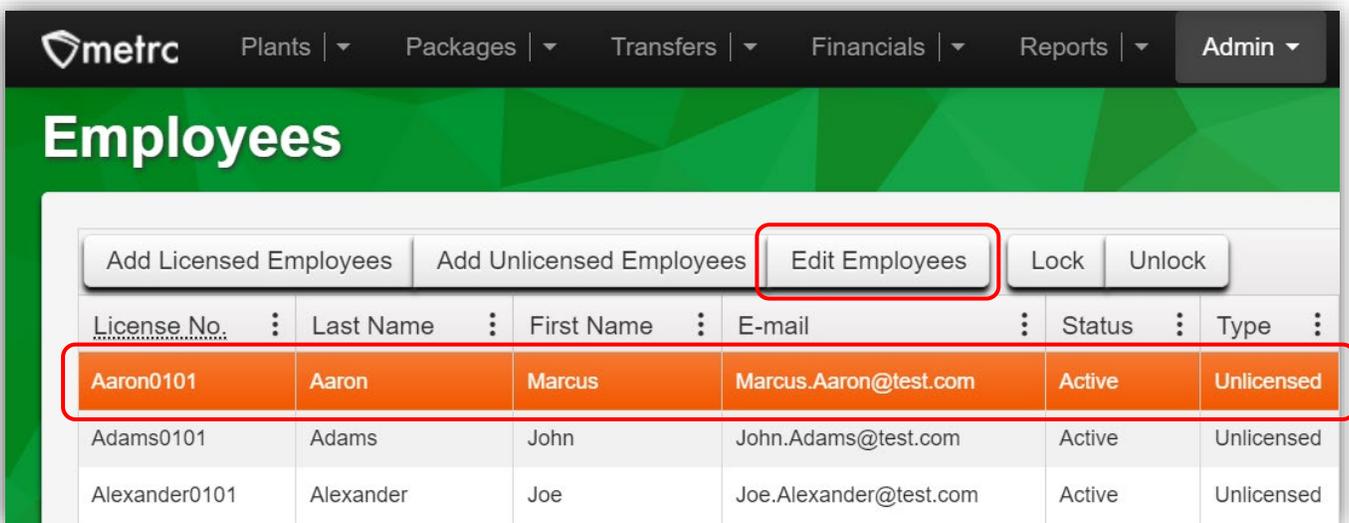# Metrc Support Bulletin

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 area drop-down on the navigational toolbar and select the Employees option to access the Employees Grid – **see Figure 1.**

Figure 1: Employees Grid

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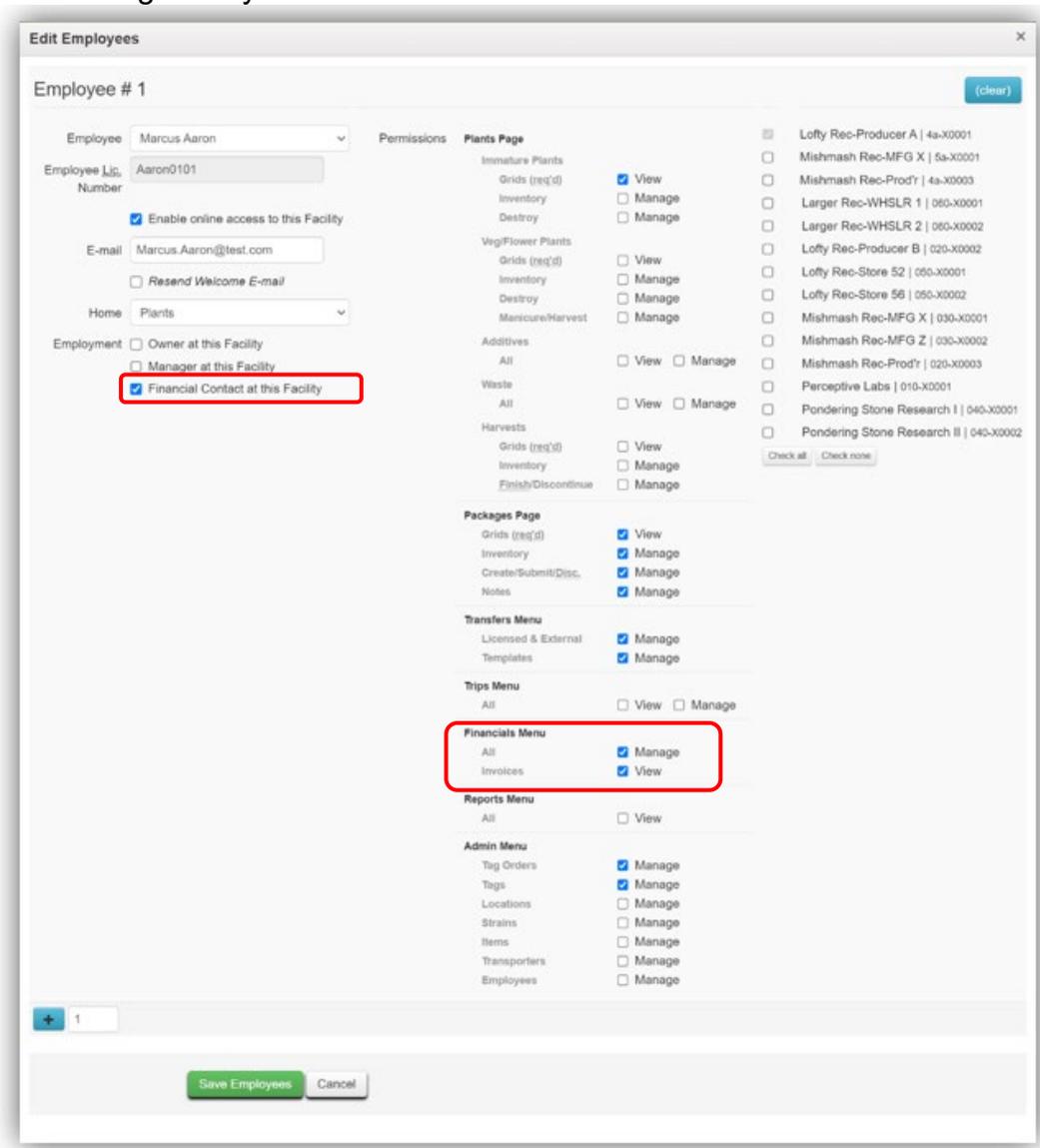

Figure 2: Edit Employees button

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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.
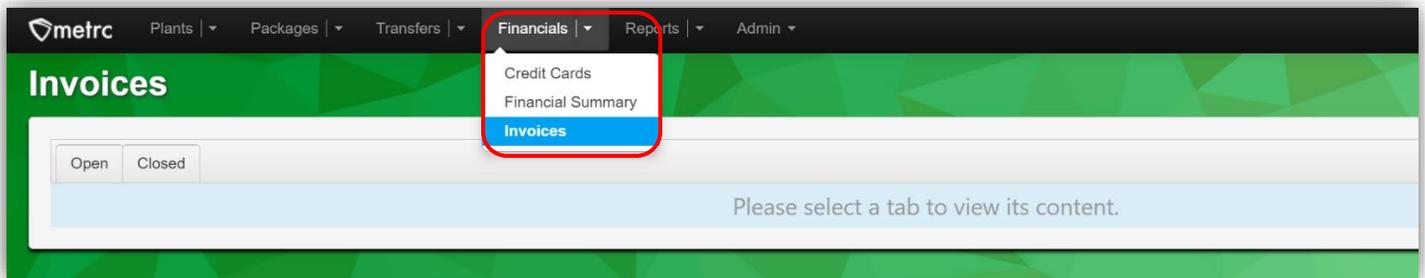

Figure 3: Edit Employees action window and financial permissions

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 area dropdown on the navigational toolbar and select the Invoices option – **see Figure 4.**
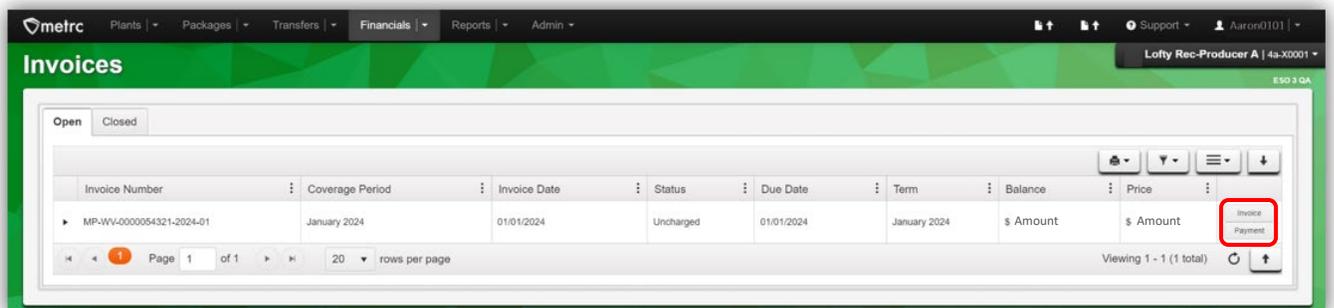

Figure 4: Navigating to the Invoices grid

Once on the Invoices grid, to view open invoices with unpaid balances, select the Open tab. In Open Invoices grid, 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.**
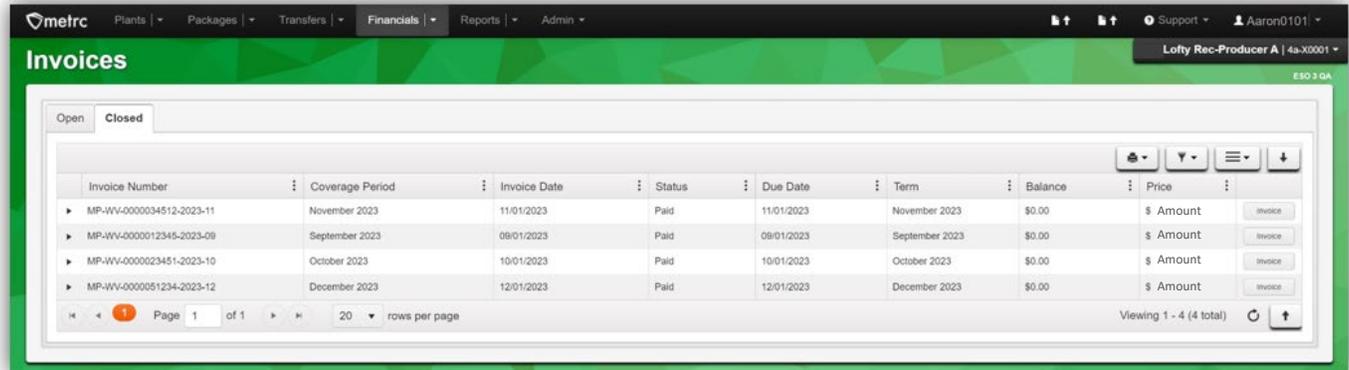
When the Payment action button is selected, the Credit Card action window will appear.

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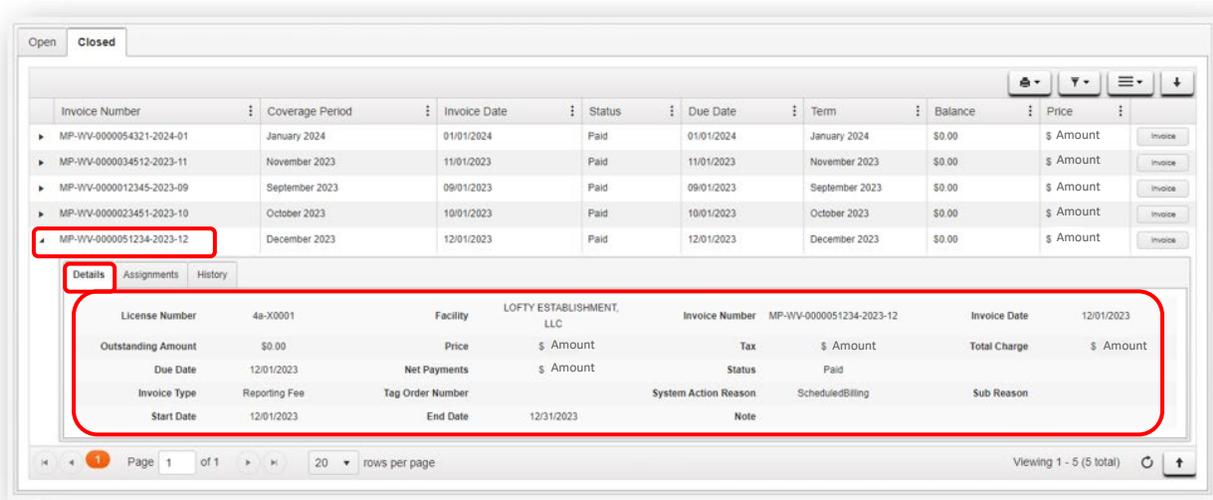

Figure 5: Open Invoices grid

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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.**
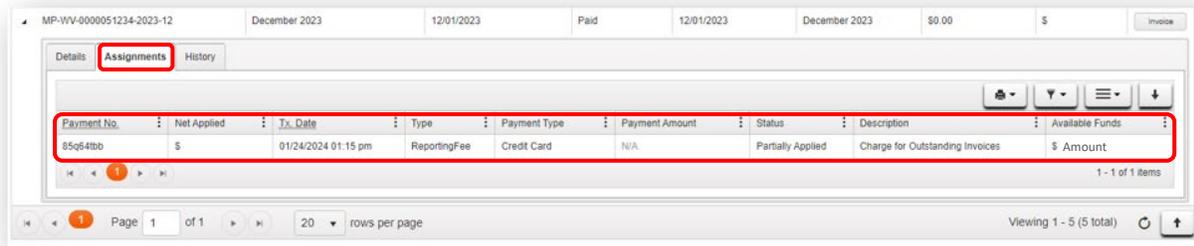

Figure 6: Closed Invoices grid

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.**
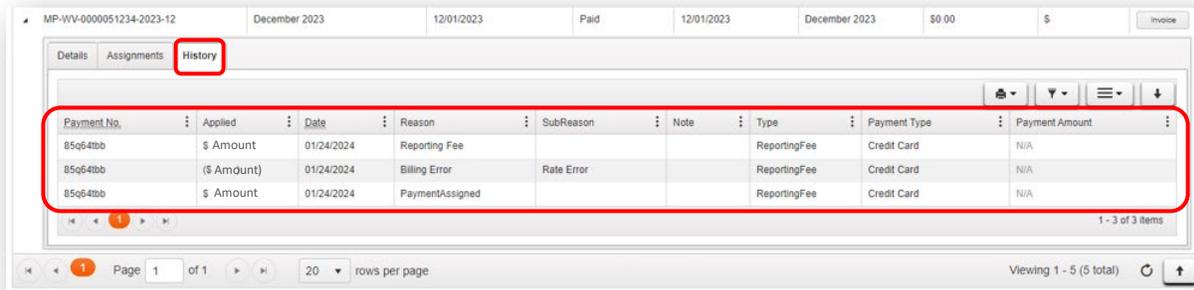

Figure 7: View closed invoice Details

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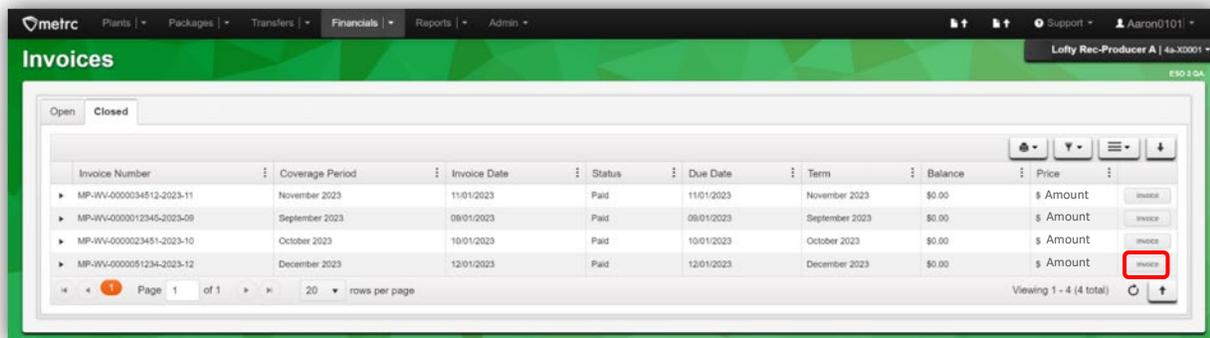
Figure 8: View closed invoice Assignments

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.**

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

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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.*

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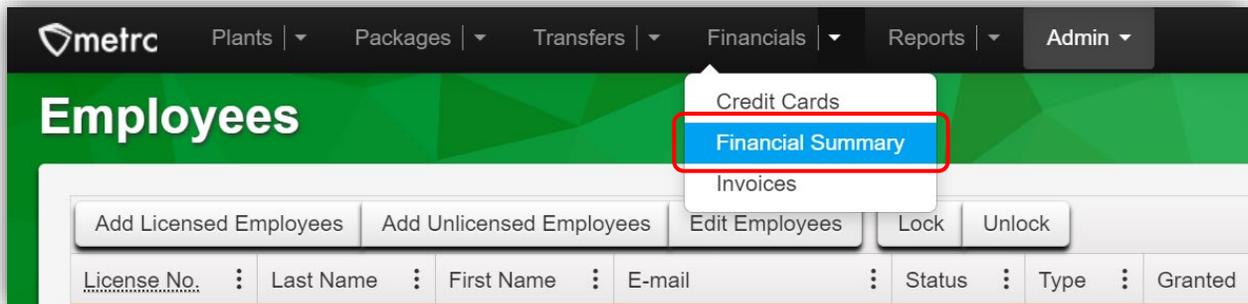
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Important note: Access to invoices, and the ability to download and/or print, will be available from the Invoices grid. Direct access will offer greater efficiencies, including real-time ability to view and/or manage invoices in a singular location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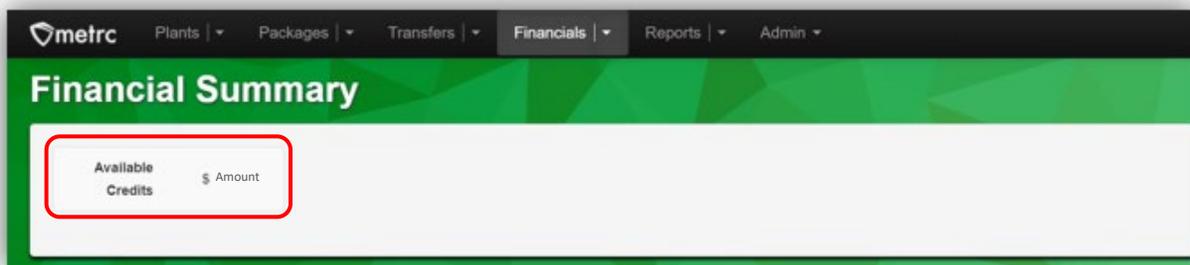
Financial Summary

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 area dropdown on the navigational toolbar and select the Financial Summary option – **see Figure 11.**

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.**
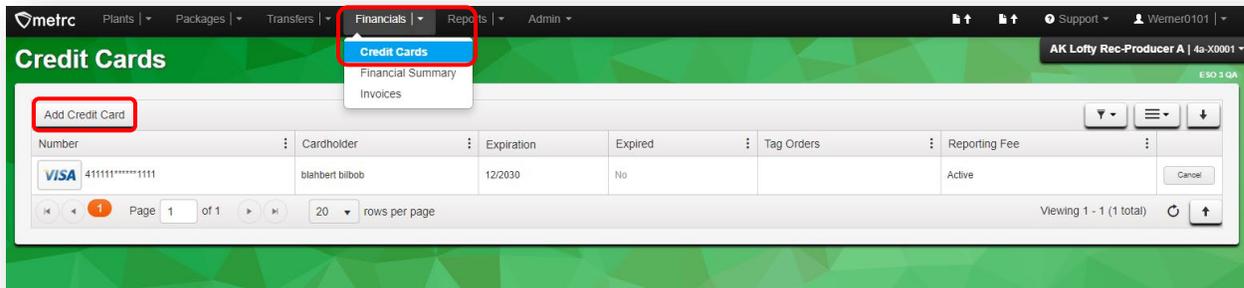

Figure 12: Available Credits in Financial Summary grid

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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:
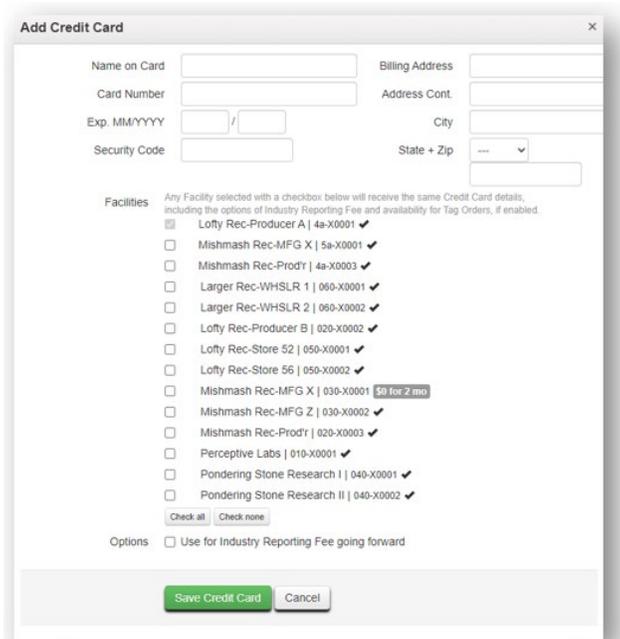
Pay by credit card – *Recommended*
To review, update, or add a credit or debit card, select the Financials area dropdown on the navigational toolbar, then select Credit Cards – **see Figure 13.**

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.**

Figure 14: Add Credit Card action window

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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

Enhancements to Data Import Queue

In November 2023, the updated Data Import (CSV queue) functionality was released to create better workflow efficiencies through expanding CSV data import capabilities and reduce time spent waiting for CSV uploads to occur before completing other actions in the Metrc system.

Based on market requirements, the updated Data Import (CSV queue) functionality has offered:

- Data import expansion to 10,000 rows per upload instead of 500/1000, depending on market.
- Notifications on upload status.
- Ability to add multiple files to the queue at the same time and log out or take other actions while uploading.
- Error reporting on uploaded files with a return file showing exact lines that failed.
- Acceptance of rows that are correct instead of throwing an error and preventing the entire upload.

To deliver a more efficient experience with the Metrc system, legacy functionality will no longer be supported starting on April 30th, 2024, and the updated functionality will need to be used.
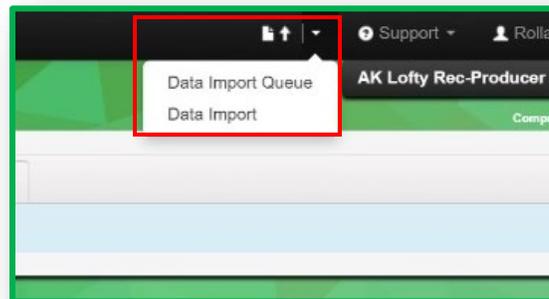
In addition, the following user interface (UI) changes have been made; These changes do not impact workflows or the new functionality.

- A new navigational toolbar dropdown is available to make it easier to access the updated functionality.
- The page name "Updated Data Import" changed to "Data Import Queue" to reduce confusion between legacy and new functionality.

Licensed users will have a new CSV import process available that allows for larger CSV files to be uploaded. This new process removes the current 500-row limit on uploads and allows for CSV files up to 1 MB in size to be uploaded. Imported CSV files are automatically uploaded into a queue to allow users to upload one or more CSV files.

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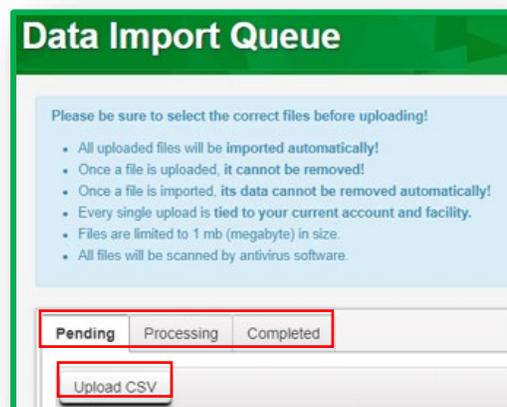
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Users can log out or work in other areas of Metrc and return to the data import area later to view the status of their import requests.

Until April 30th, users will have two data import options available from the navigational toolbar dropdown – **see Figure 1.** If "Data Import" is selected, the page that opens will show up as "Data Import (legacy)".

Figure 1: Dropdown to access Data Import options

Previously named Updated Data Import, the *Data Import Queue* page is designed to improve the user experience and allow users to track the status of their import requests using the three tabs shown in **Figure 2** below:
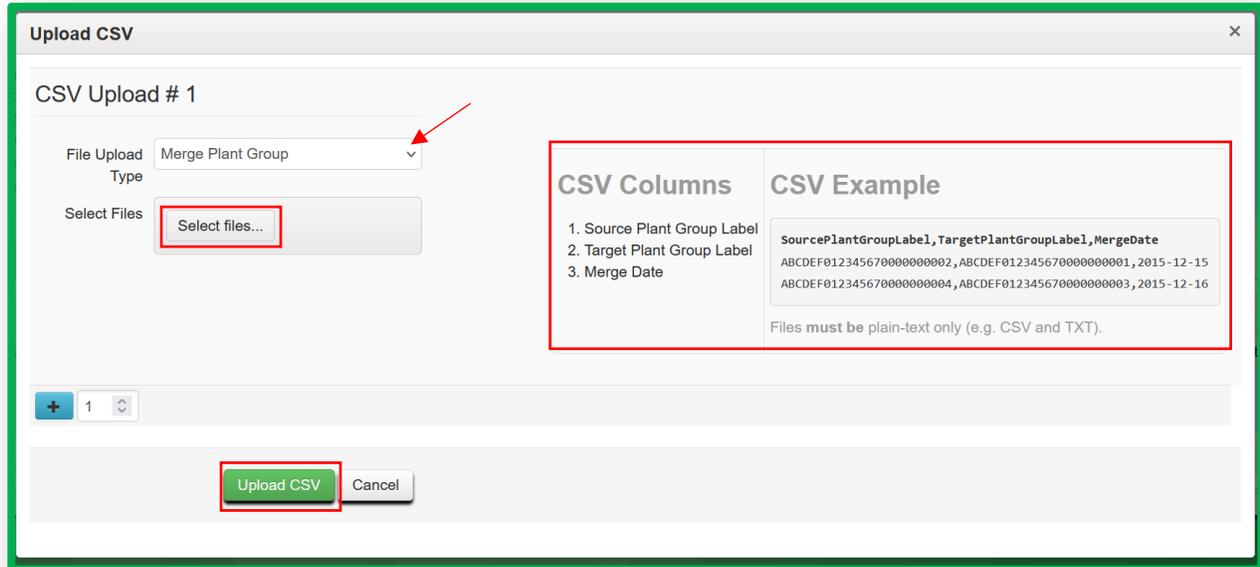

Figure 2: Data Import Queue page

Pending tab: CSV imports are initiated from the *Pending* tab by selecting the *Upload CSV* tab highlighted in **Figure 2** above.
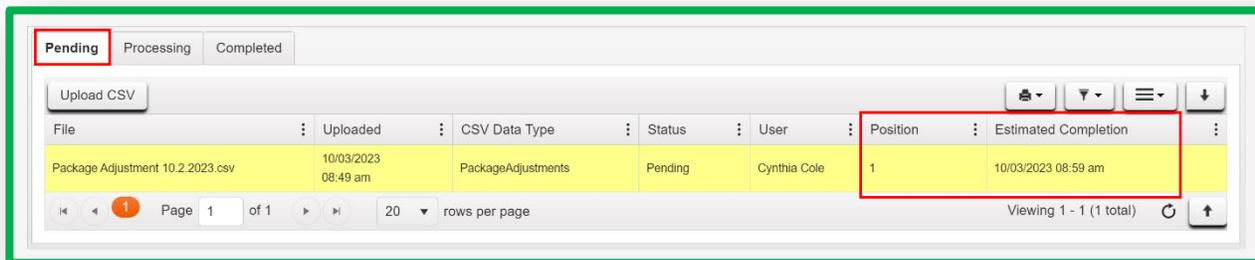
The *Upload CSV* action window, as shown in **Figure 3** below, allows the user to select the applicable *File Upload Type* from a drop-down list and either use the *Select Files* button to browse their device to choose the CSV file to be imported or drag and drop the CSV file to be imported into the *Select Files* area of the modal.

Figure 3 below demonstrates further. Notice that the CSV columns region of the action window displays the required sequence and data points within the CSV upload.

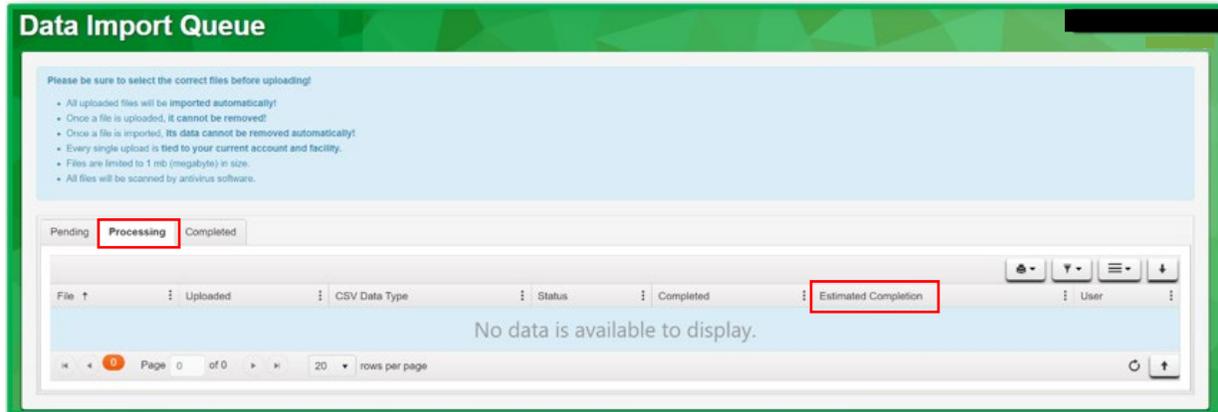**Figure 3: Upload CSV action window**

Once the *Upload CSV* button is selected, the import request displays as a row on the *Pending* grid until processing begins. The *Pending* tab includes a *Position* column which indicates where the file stands in the processing queue. In **Figure 4** below the *Position* value indicates the upload is number 1 in the queue. An *Estimated Completion* column has been added to the *Pending* grid as well.

Figure 4: Pending button

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Processing tab: While being processed, the import request is displayed on the *Processing* tab.
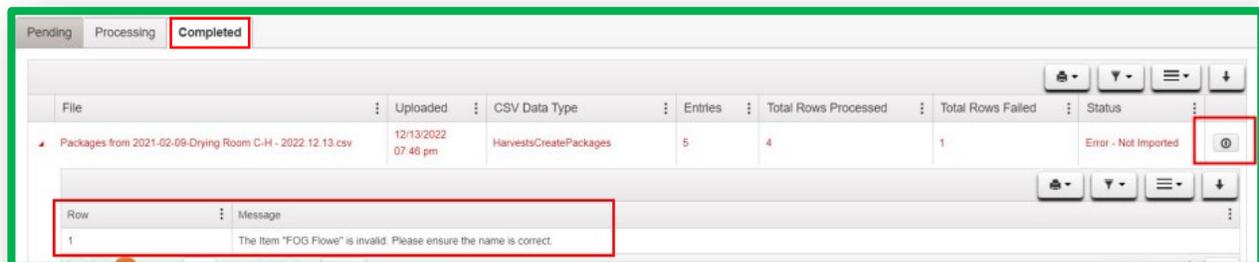
An *Estimated Completion* column has been added to the *Processing* grid as shown in **Figure 5**. Additionally, an email is generated to the user as soon as processing has begun. The email includes an updated estimated completion time.
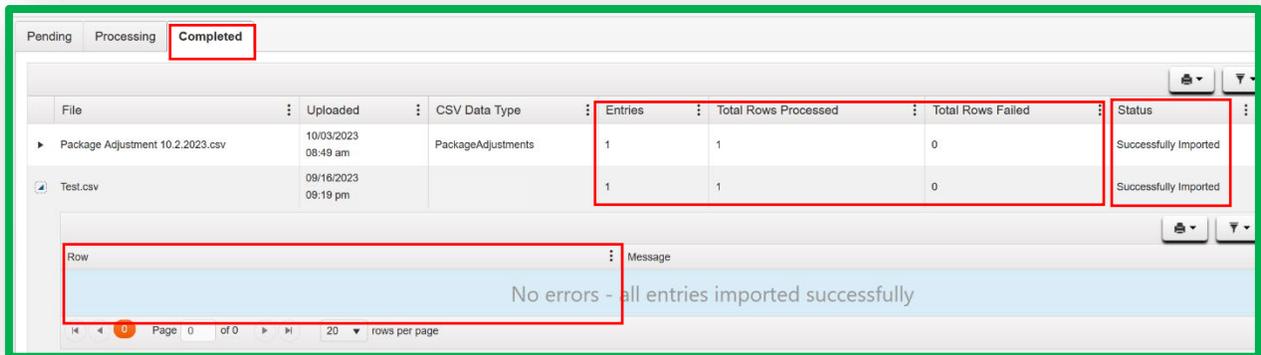

Figure 5: Processing button

Completed tab: When processing of an import request is completed, the request displays on the *Completed* tab, along with the *Total Rows Processed*, *Total Rows Failed*, and an overall status indicating either *Successfully Imported* or *Error – Not Imported*.

Metrc processes any rows it can rather than rejecting the entire file due to errors on a subset of the rows in the file. Metrc creates a CSV file containing just the failed rows. The user can download the CSV file using the download tab highlighted in **Figure 6** and then refer to the error messages in the drill down to resolve the issues prior to submitting a new request to process the corrected rows.

Figure 6: CSV File Downloads and Error Messaging

The only exception to the import process occurs at the Laboratory/Testing level. For Lab Testing, all data files must be successfully imported in full. Should the upload incur errors, the entire file will need to be re-submitted as partial file acceptance will not occur. **Figure 7** demonstrates a successful upload in full, without errors. Notice that the history drill down states there were no errors and the *Total Rows Failed* and *Status* reflect a successful upload.

Figure 7: Completed Uploads Without Errors

For additional visibility and clarity into the data upload process, a no reply email from noreply@metrc.com will be sent to the user's email address that will confirm the data import status. This will look much like **Figure 8** below.

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CSV Processing Complete

File: Package Adjustment 10.18.2023.csv

Type: Package Adjustments

License: 100000C

Facility: Medical Cultivator

Errors Found: 0

Figure 8: E-mail Confirmation example

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![metrc logo]

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 Support.Metrc.com, 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 are required. For additional information, please review the step-by-step guide or a video demo.

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 log in, visit Metrc Learn and enter your login credentials, or to access, register by visiting the Metrc Learn Registration**.**

Access additional resources: In the Metrc system, click on the Support area dropdown on the top-right navigational toolbar and select the appropriate resource, including educational guides, manual, and more.

Thank you for your continued partnership.

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