

<b>Bulletin Number:</b> MD_IB_0080	<b>Distribution Date:</b> 03/08/2024	<b>Effective Date:</b> 03/18/2024
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Billing revamp and CSV queue import functionality	
<b>Reason:</b> 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

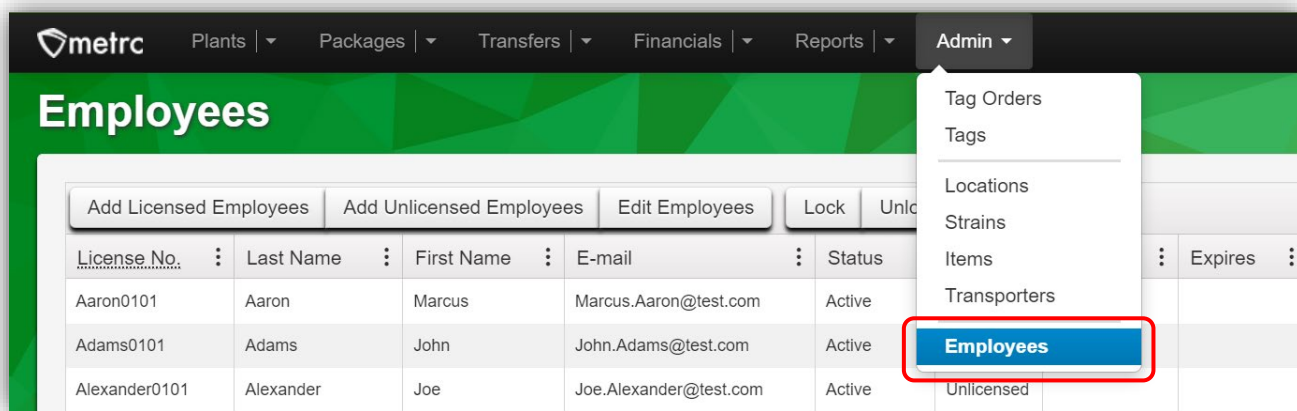
Metrc is also providing information about an updated CSV data import function that is now available for users in platform.

Please read on for more information regarding this new functionality.

## Financial permissions

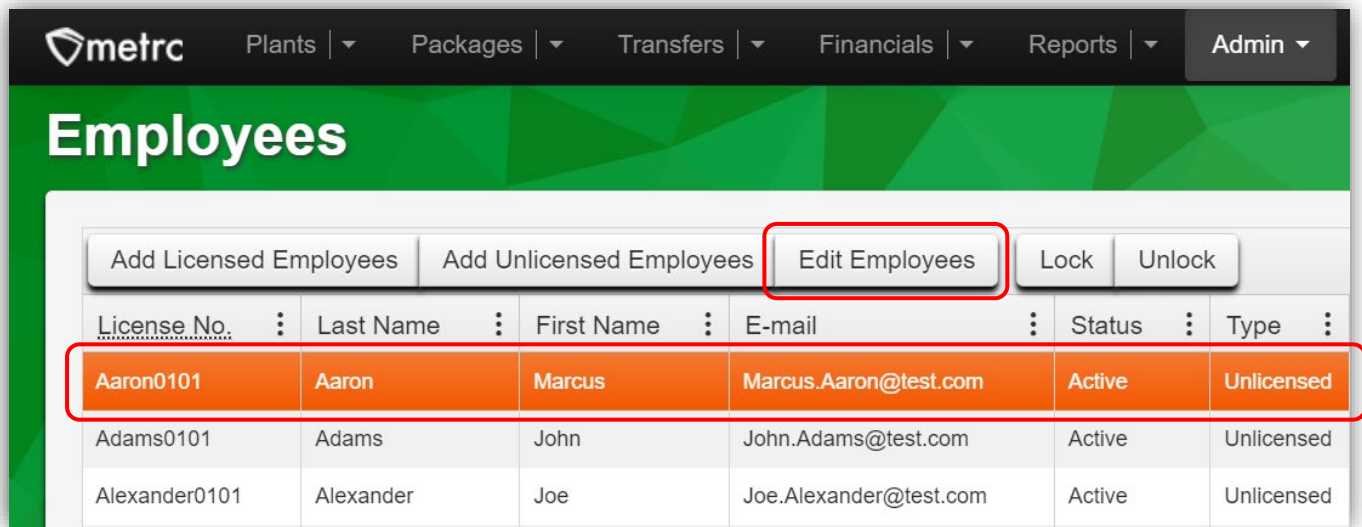
Historically, upon credentialing a new license in the Metrc system, the first Admin added to the account defaults as the financial point of contact. While this default setting will not change, the Admin will now have the ability to designate additional financial points of contact, or backup administrators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

To designate one or more additional financial points of contact, navigate to the Admin 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.**



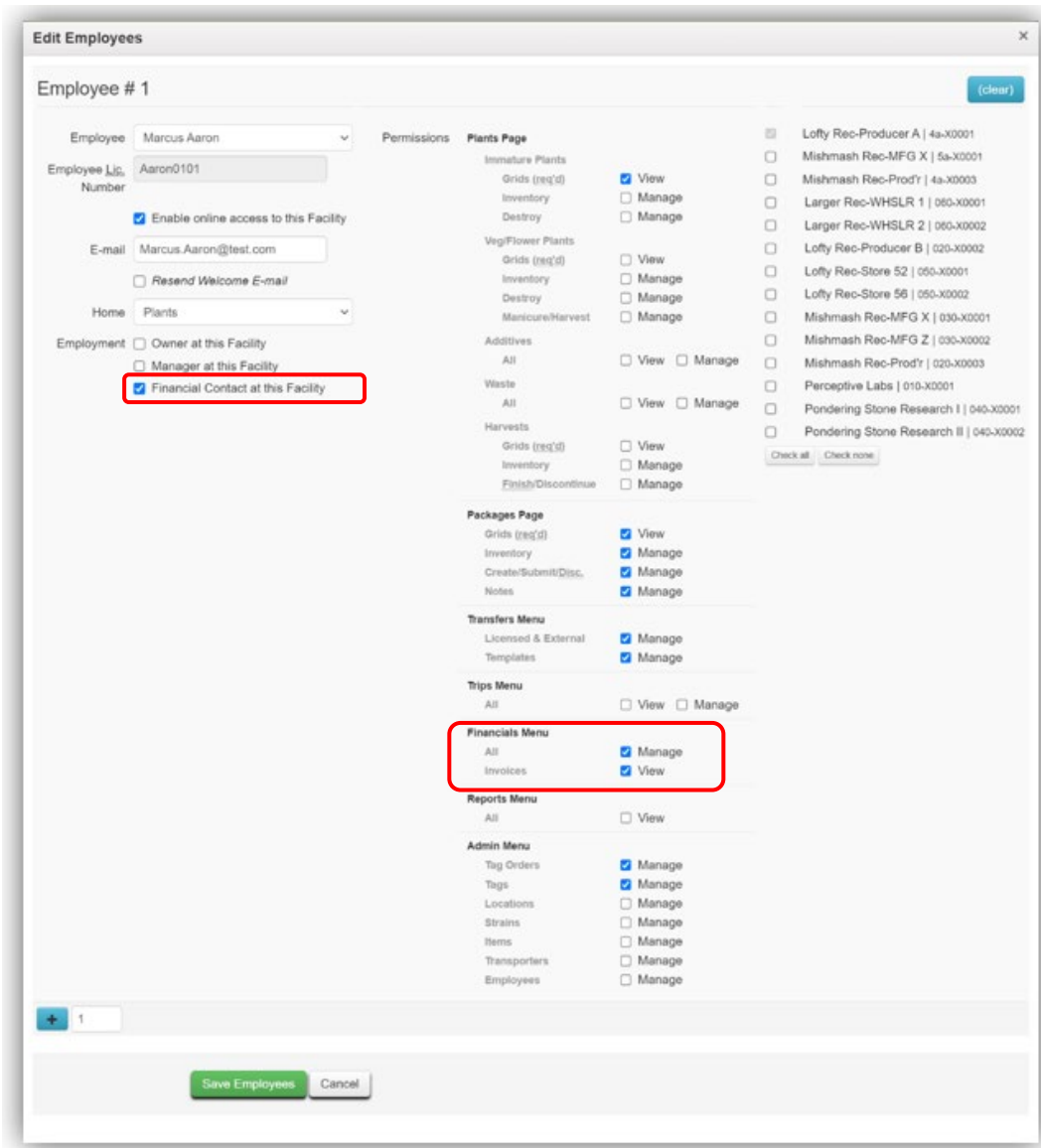
**Figure 2: Edit Employees button**

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 Employees**

Employee # 1 (clear)

Employee: Marcus Aaron

Employee ID, Number: Aaron0101

☒ Enable online access to this Facility

E-mail: Marcus.Aaron@test.com

☐ Resend Welcome E-mail

Home: Plants

Employment: ☐ Owner at this Facility, ☐ Manager at this Facility, ☒ Financial Contact at this Facility

**Permissions**

**Plants Page**

- Immature Plants
  - Grids (req'd) ☒ View
  - Inventory ☐ Manage
  - Destroy ☐ Manage
- Veg/Flower Plants
  - Grids (req'd) ☐ View
  - Inventory ☐ Manage
  - Destroy ☐ Manage
  - Manicure/Harvest ☐ Manage
- Additives
  - All ☐ View ☐ Manage
- Waste
  - All ☐ View ☐ Manage
- Harvests
  - Grids (req'd) ☐ View
  - Inventory ☐ Manage
  - Finish/Discontinue ☐ Manage

**Packages Page**

- Grids (req'd) ☒ View
- Inventory ☒ Manage
- Create/Submit/Disc. ☒ Manage
- Notes ☒ Manage

**Transfers Menu**

- Licensed & External ☒ Manage
- Templates ☒ Manage

**Trips Menu**

- All ☐ View ☐ Manage

**Financials Menu**

- All ☒ Manage
- Invoices ☒ View

**Reports Menu**

- All ☐ View

**Admin Menu**

- Tag Orders ☒ Manage
- Tags ☒ Manage
- Locations ☐ Manage
- Strains ☐ Manage
- Items ☐ Manage
- Transporters ☐ Manage
- Employees ☐ Manage

**Facilities**

- ☐ Lofty Rec-Producer A | 4a-X0001
- ☐ Mishmash Rec-MFG X | 5a-X0001
- ☐ Mishmash Rec-Prod'r | 4a-X0003
- ☐ 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
- ☐ 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

+ 1

Save Employees Cancel

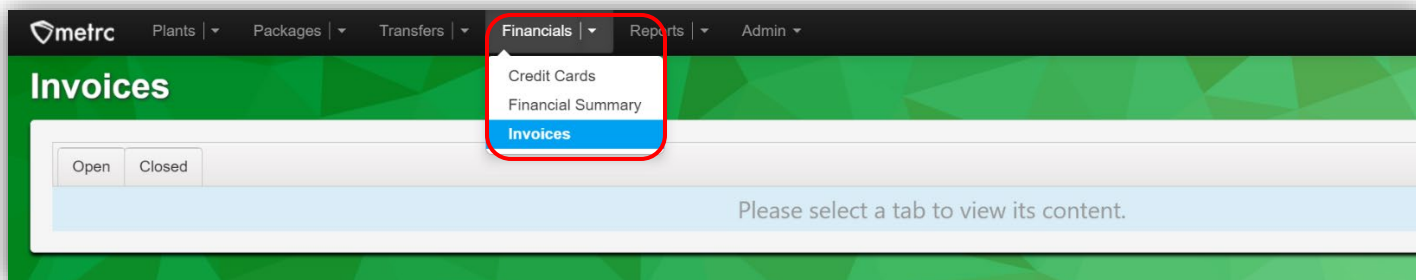
**Figure 3: Edit Employees action window and financial permissions**

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.**

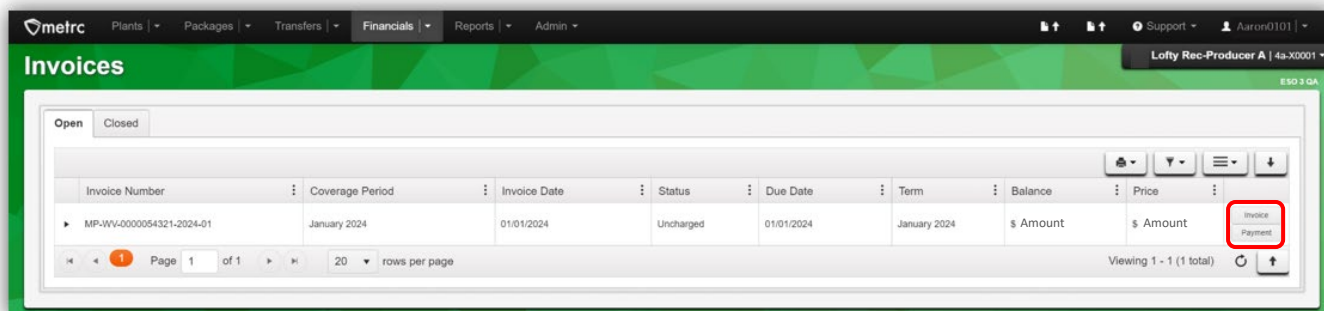


**Figure 4: Navigating to the Invoices grid**

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.**

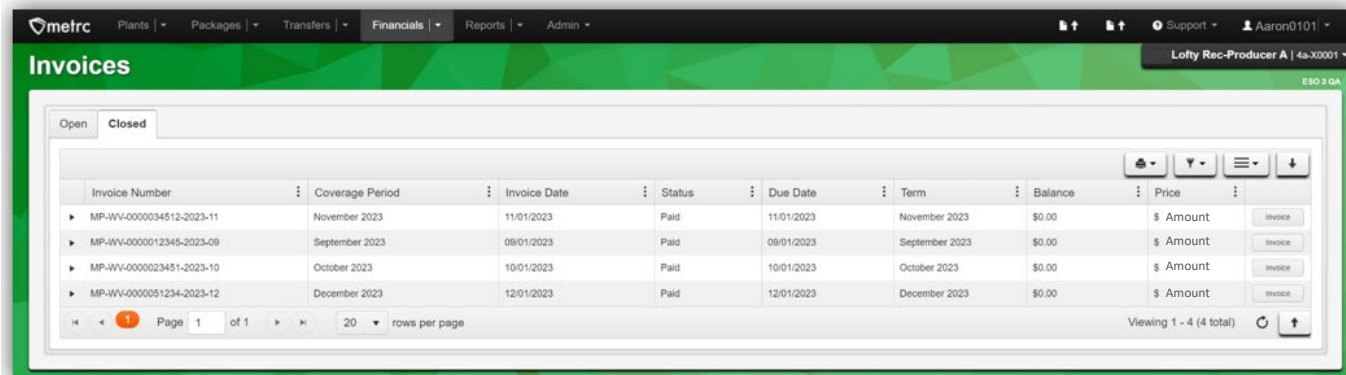
When the Payment action button is selected, the Credit Card action window will appear.

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



**Figure 5: Open Invoices grid**

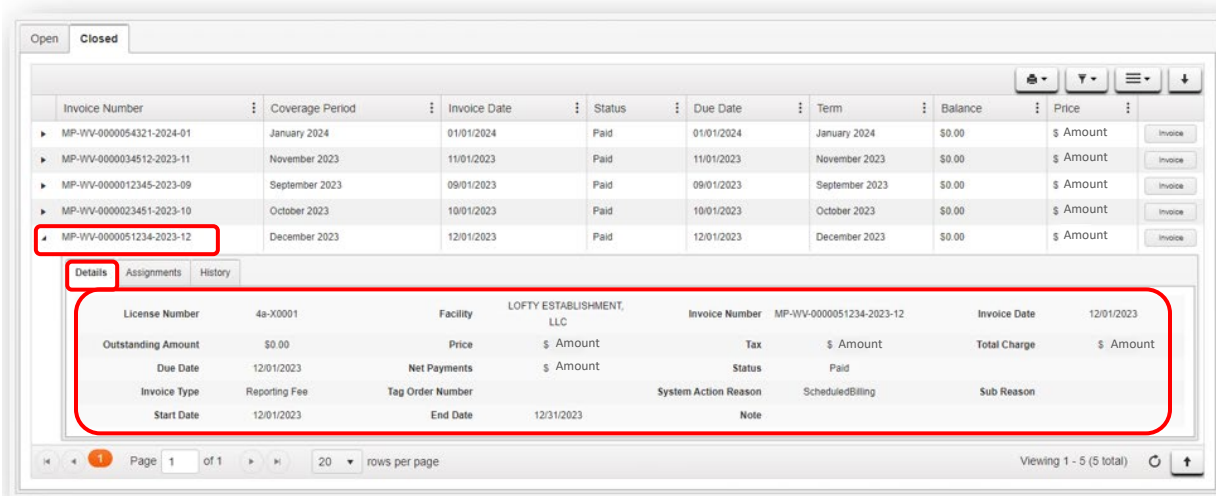
To view closed invoices with fully paid balances, select the Closed tab. While the Closed Invoices grid will look like the Open Invoices grid, the only difference will be the absence of the Payment button and the list of paid invoices will be visible – **see Figure 6.**



Invoice Number	Coverage Period	Invoice Date	Status	Due Date	Term	Balance	Price
MP-WV-0000034512-2023-11	November 2023	11/01/2023	Paid	11/01/2023	November 2023	\$0.00	\$ Amount
MP-WV-0000012345-2023-09	September 2023	09/01/2023	Paid	09/01/2023	September 2023	\$0.00	\$ Amount
MP-WV-0000023451-2023-10	October 2023	10/01/2023	Paid	10/01/2023	October 2023	\$0.00	\$ Amount
MP-WV-0000051234-2023-12	December 2023	12/01/2023	Paid	12/01/2023	December 2023	\$0.00	\$ Amount

**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.**



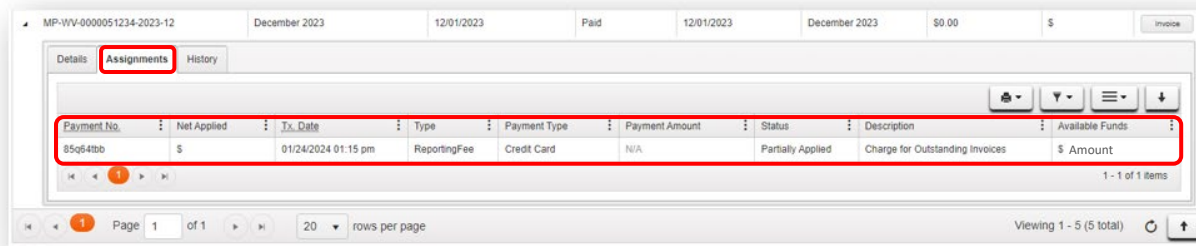
Invoice Number	Coverage Period	Invoice Date	Status	Due Date	Term	Balance	Price
MP-WV-0000054321-2024-01	January 2024	01/01/2024	Paid	01/01/2024	January 2024	\$0.00	\$ Amount
MP-WV-0000034512-2023-11	November 2023	11/01/2023	Paid	11/01/2023	November 2023	\$0.00	\$ Amount
MP-WV-0000012345-2023-09	September 2023	09/01/2023	Paid	09/01/2023	September 2023	\$0.00	\$ Amount
MP-WV-0000023451-2023-10	October 2023	10/01/2023	Paid	10/01/2023	October 2023	\$0.00	\$ Amount
MP-WV-0000051234-2023-12	December 2023	12/01/2023	Paid	12/01/2023	December 2023	\$0.00	\$ Amount

Details		Assignments		History	
License Number	4a-X0001	Facility	LOFTY ESTABLISHMENT, LLC	Invoice Number	MP-WV-0000051234-2023-12
Outstanding Amount	\$0.00	Price	\$ Amount	Tax	\$ Amount
Due Date	12/01/2023	Net Payments	\$ Amount	Status	Paid
Invoice Type	Reporting Fee	Tag Order Number		System Action Reason	ScheduledBilling
Start Date	12/01/2023	End Date	12/31/2023	Note	

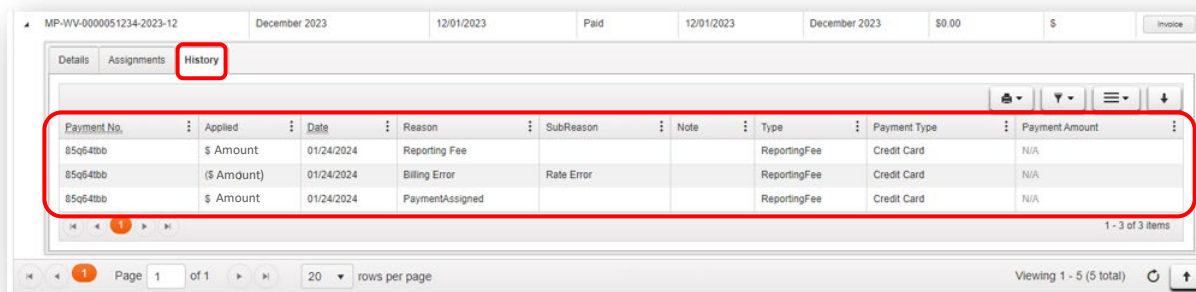
**Figure 7: View closed invoice Details**

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



Payment No.	Net Applied	Tx Date	Type	Payment Type	Payment Amount	Status	Description	Available Funds
85q64tbb	\$	01/24/2024 01:15 pm	ReportingFee	Credit Card	N/A	Partially Applied	Charge for Outstanding Invoices	\$ Amount

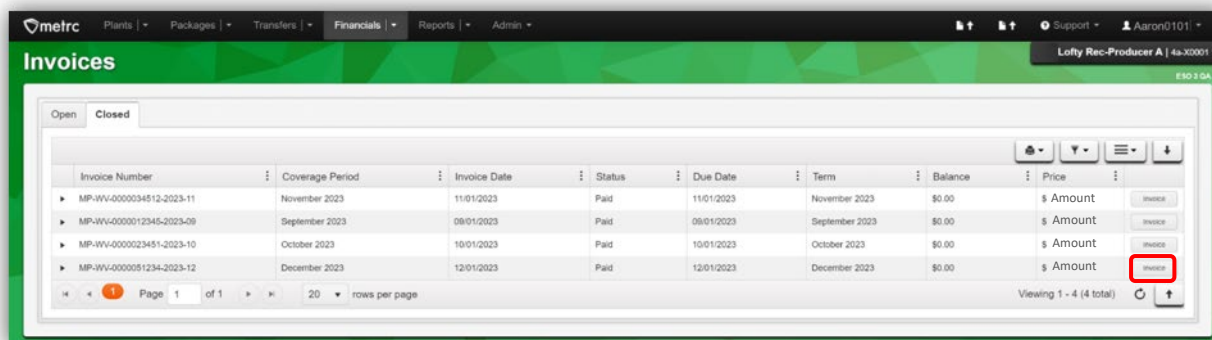
**Figure 8: View closed invoice Assignments**



Payment No.	Applied	Date	Reason	SubReason	Note	Type	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.**



Invoice Number	Coverage Period	Invoice Date	Status	Due Date	Term	Balance	Price	Invoice
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	\$ Amount	Invoice
MP-WV-0000023451-2023-10	October 2023	10/01/2023	Paid	10/01/2023	October 2023	\$0.00	\$ Amount	Invoice
MP-WV-0000051234-2023-12	December 2023	12/01/2023	Paid	12/01/2023	December 2023	\$0.00	\$ Amount	Invoice

**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 paid 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 unpaid 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](mailto:Support@metrc.com)



**INVOICE**

DATE: January 22, 2024

INVOICE #:  
MP-DEMO-QAE38R-  
000000003-2024-01

**TERMS:**  
Due upon receipt

**BILL TO:**

LICENSE #:

Quantity	Description	Date	Unit Price	Total
1	Monthly Reporting Fee	1/1/2023 - 1/31/2024	\$ Amount	\$ Amount

Invoice Subtotal: \$ Amount

Sales Tax: \$ Amount

Sales Tax Adjustment: \$ Amount

Invoice Due: \$ Amount

Payment Received: \$ Amount

Final Amount Due: \$ Amount



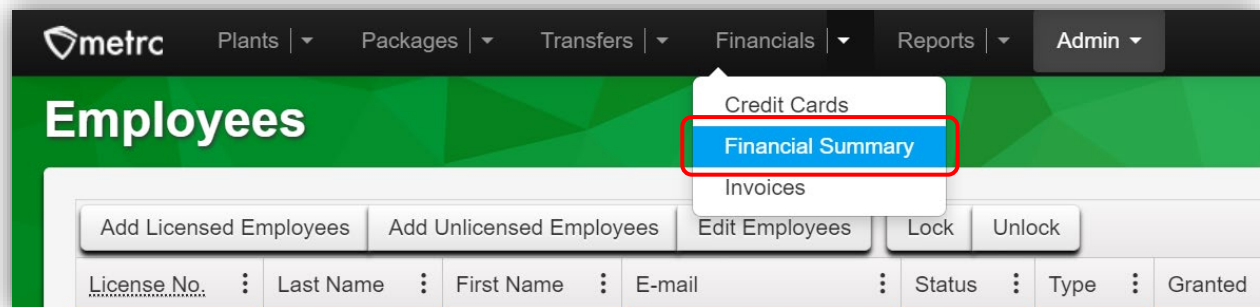
**Important note:** Access to invoices, and the ability to download and/or print, will be available from the Invoices grid. Direct access will offer greater efficiencies, including real-time ability to view and/or manage invoices in a singular location and limit incoming or outgoing communications to/from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



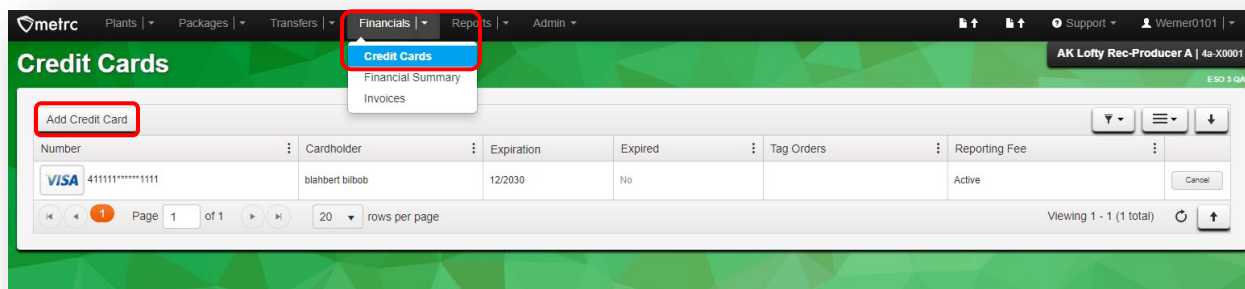
**Figure 12: Available Credits in Financial Summary grid**

## 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:

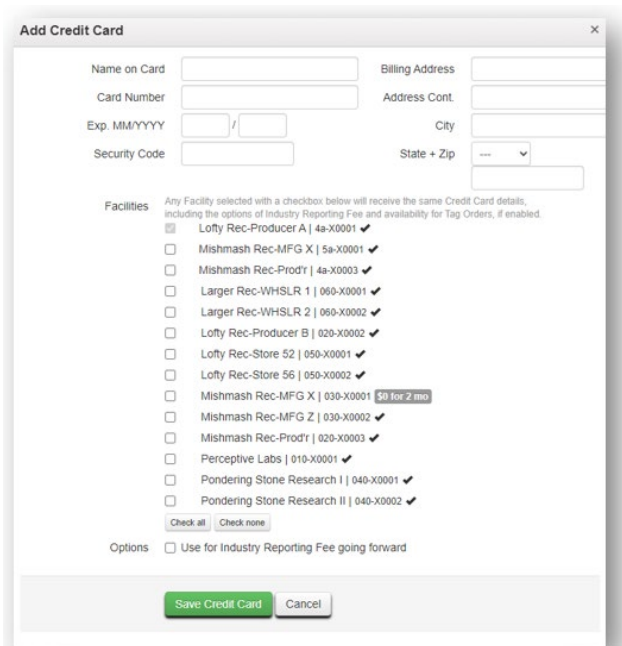
### Pay by credit card – *Recommended*

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**

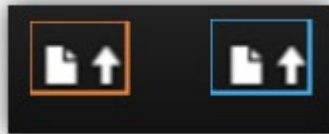
In addition, payments can be made via check or money order and sent to the following address:

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

### Enhancements to Updated CSV Queue Data Import

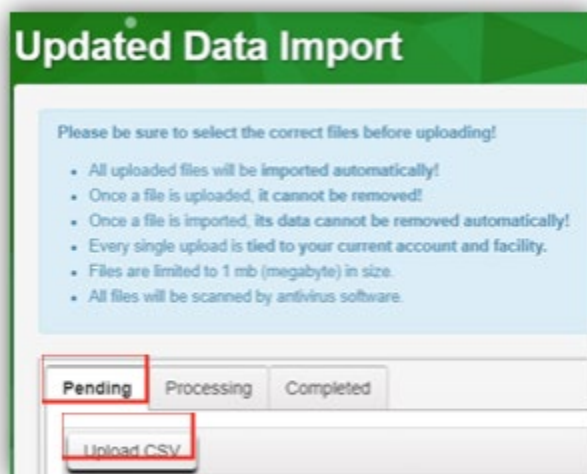
To improve workflows, and in response to industry requests, Metrc has developed an improved CSV import experience that allows for larger CSV files to be uploaded. This improved process removes the current 500-row limit on uploads and allows for CSV files up to 1 MB in size to be uploaded. Imported CSV files are automatically uploaded into a queue to allow users to upload one or more CSV files at a time. 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.

Now, two data imports options will be available in the navigational toolbar. The icon in orange on the left opens the original upload page that only allows for one upload at a time. The icon in blue on the right opens the improved Updated Data Import page, which is encouraged as a best practice to use to access the new functionality described below – **see Figure 1.**



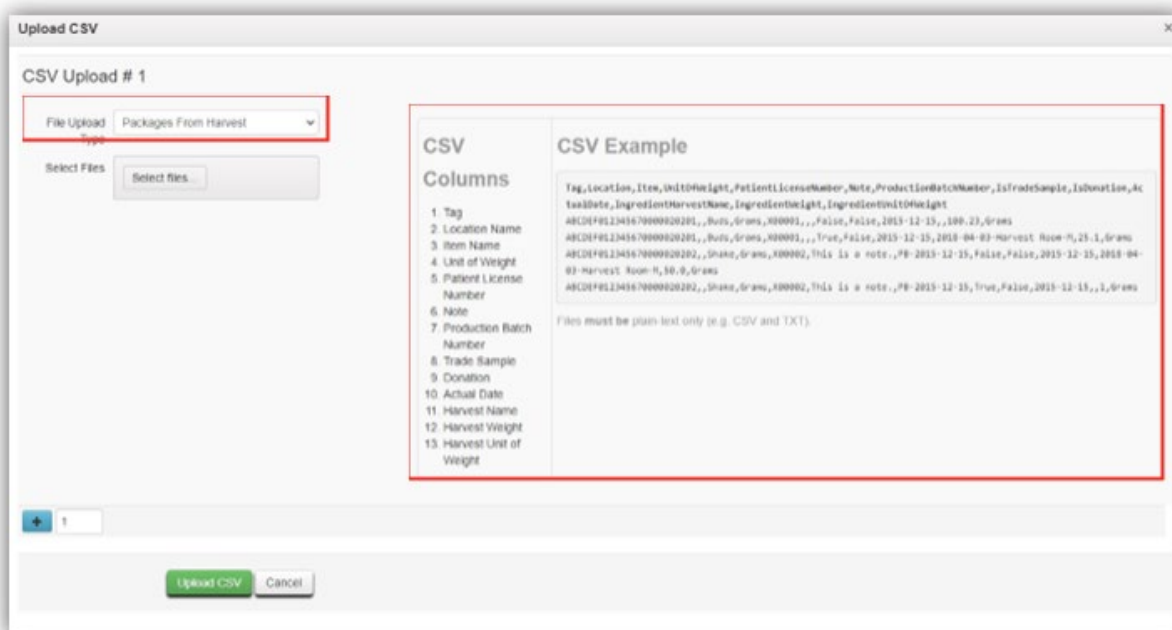
**Figure 1: Data Import options in navigational toolbar**

The Updated Data Import page is designed to provide a more efficient experience and allow for status tracking on import requests using the three tabs located at the top of the grid. To initiate the CSV upload, start on the Pending tab and click the Upload CSV button – **see Figure 2.**



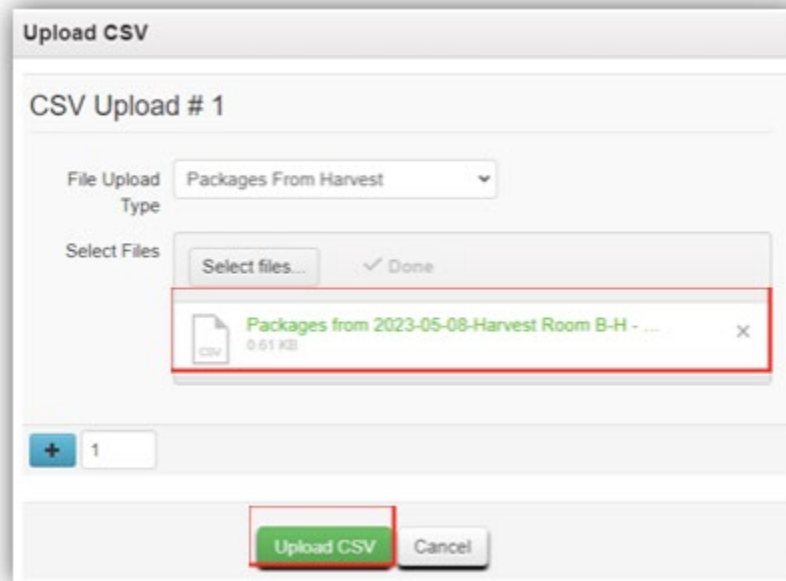
**Figure 2: Updated Data Import page**

After selecting the Upload CSV button, the Upload CSV action window will appear. First, select the applicable File Upload Type from the drop-down list. Once a File Upload Type has been selected, information clarifying what CSV columns are required and an example of the file type will be shown – see **Figure 3**.



**Figure 3: Upload CSV action window & CSV file type information**

Then, either use the Select files button to browse the device to choose the CSV file to be imported or drag and drop a CSV file into the Select Files area of the action window. Once the CSV file is successfully recognized, the file name will appear in green letters. To initiate the final upload, click the green Upload CSV button – **see Figure 4.**



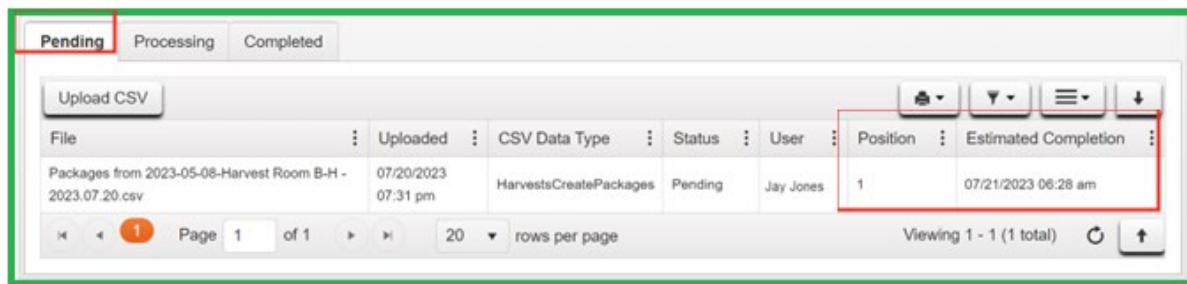
**Figure 4: Upload CSV file acceptance**

**Note:** Visibility into the CSV upload status will be available throughout the process. The upload will start on the Pending tab, then move to the Processing tab, and finish on the Completed tab. Details about each tab are provided on the following pages.

### **CSV Upload – Pending:**

The import request will be displayed as a row in the grid on the Pending tab until processing begins. The Pending tab includes a Position column which indicates where the file stands in the processing queue.

The file being uploaded in this example has a position of 1, indicating the upload is number one in the queue. An Estimated Completion column is also available to provide more transparency into the estimated completion time – **see Figure 5.**

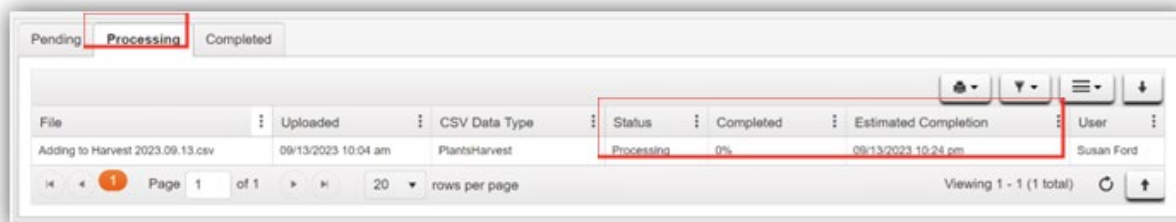


File	Uploaded	CSV Data Type	Status	User	Position	Estimated Completion
Packages from 2023-05-08-Harvest Room B-H - 2023.07.20.csv	07/20/2023 07:31 pm	HarvestsCreatePackages	Pending	Jay Jones	1	07/21/2023 06:28 am

**Figure 5: CSV Upload in Pending grid**

### CSV Upload – Processing:

During this phase, the import request is displayed in the Processing tab grid, which also includes an Estimated Completion column and status of completion percentage – **see Figure 6.**



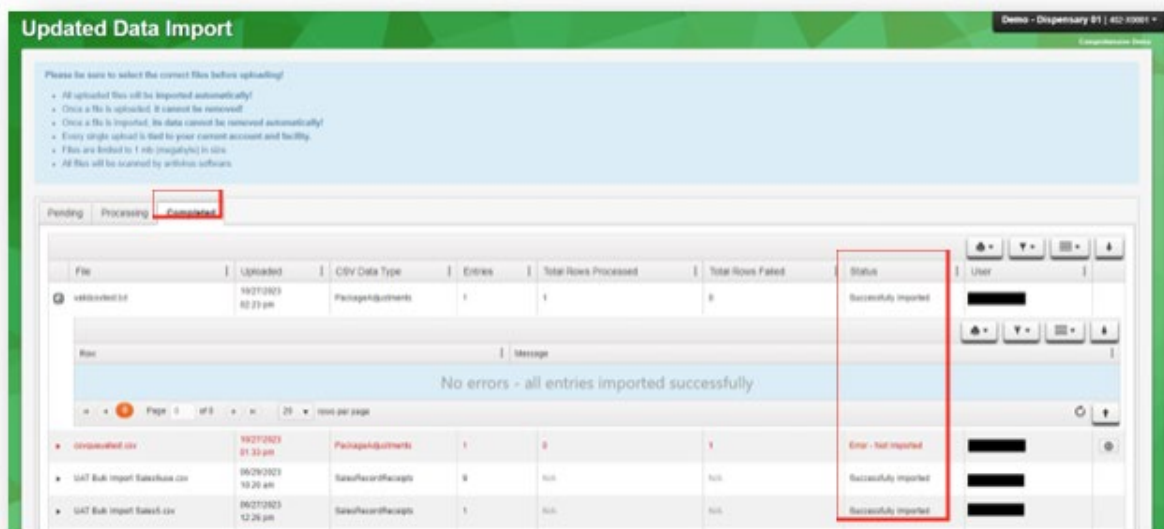
File	Uploaded	CSV Data Type	Status	Completed	Estimated Completion	User
Adding to Harvest 2023.09.13.csv	09/13/2023 10:04 am	PlantsHarvest	Processing	0%	09/13/2023 10:24 pm	Susan Ford

**Figure 6: CSV Upload in Processing grid**

Once processing has begun, an email will be generated and sent to the user who added the file for upload to notify of the transition from pending to processing. The email includes an updated estimated completion time, if applicable.

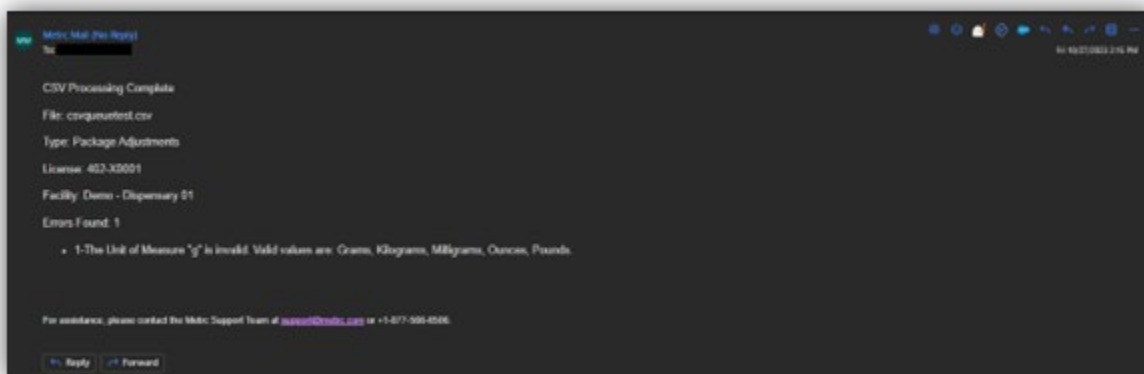
### CSV Upload – Completed:

When processing an import request is complete, the request displays on the Completed tab grid. The Completed grid includes columns for information about the CSV upload including Total Rows Processed, Total Rows Failed, and an overall Status indicator displaying either Successfully Imported or Error – Not Imported – **see Figure 7.**



**Figure 7: Successfully completed CSV Upload**

Once processing is complete, an email will be generated and sent to the user who added the file for upload and include information about any errors found while processing the file – **see Figure 8.**



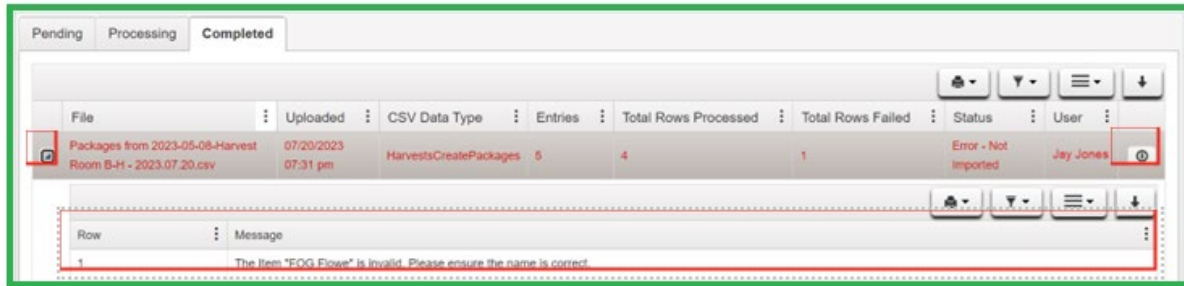
**Figure 8: Example email for CSV upload completed**

**For all imports except Lab Test Results:**

Metrc processes all accurate file data and only rejects incorrect information rather than rejecting the entire file due to a fraction of errors in the file. As a result, the system creates a CSV file containing just the failed rows. To view, use the download button on the right side of the line item in the grid to download the CSV file. Then, refer to the



error messages in the drilldown prior to submitting a new request to process the corrected rows – see **Figure 9**.



File	Uploaded	CSV Data Type	Entries	Total Rows Processed	Total Rows Failed	Status	User
Packages from 2023-05-08-Harvest Room B-H - 2023.07.20.csv	07/20/2023 07:31 pm	Harvests/CreatePackages	5	4	1	Error - Not Imported	Jay Jones

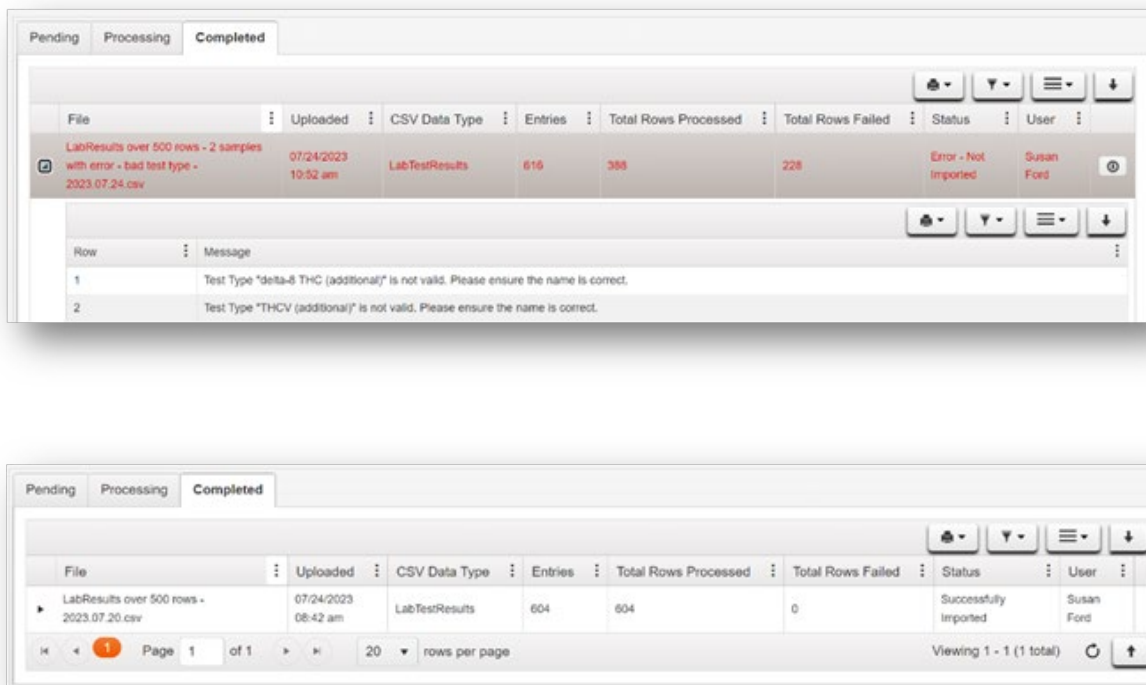
Row	Message
1	The item "FOG Floor" is invalid. Please ensure the name is correct.

**Figure 9: Completed tab – Download button and Error Messages**

## **For Lab Test Results imports:**

If errors are detected on any row in the CSV file for a specific lab sample package, no data included in the file will be processed, and Metrc will create a CSV file containing all rows for the lab sample.

To view, use the download button on the right side of the line item in the grid to download the CSV file. Then, refer to the error messages in the drilldown prior to submitting a new import request. Rows without errors are listed in the drilldown with a message indicating "No Error" – see **Figure 10**.



File	Uploaded	CSV Data Type	Entries	Total Rows Processed	Total Rows Failed	Status	User
LabResults over 500 rows - 2 samples with error - bad test type - 2023.07.24.csv	07/24/2023 10:52 am	LabTestResults	615	358	228	Error - Not Imported	Susan Ford

Row	Message
1	Test Type "delta-8 THC (additional)" is not valid. Please ensure the name is correct.
2	Test Type "THCV (additional)" is not valid. Please ensure the name is correct.

File	Uploaded	CSV Data Type	Entries	Total Rows Processed	Total Rows Failed	Status	User
LabResults over 500 rows - 2023.07.20.csv	07/24/2023 08:42 am	LabTestResults	604	604	0	Successfully Imported	Susan Ford

**Figure 10: Screenshot of completed upload with both error and error free rows**



### 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](https://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 is 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 login, 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.