



Bulletin Number: CA-IB-2024-001	Distribution Date: 4/4/2024	Effective Date: 3/26/2024
Contact Point: Metric Support	Subject: Default Facility, New View Permissions, and View Voided Transfers	
Reason: To introduce (1) a feature to set a default facility, (2) updates to grant employees view-only permissions to Transfers, Sales, and Employees, and (3) updates to identify and view voided transfers		

Greetings,

Metric appreciates the collaboration with both The Department of Cannabis Control and its licensees to continue making improvements to the system that benefit all users. The following enhancements have been incorporated into the system:

- The ability to set a default facility as the landing page upon logging into Metric
- The addition of View permissions for the following areas of the Metric system:
 - Transfers
 - Sales
 - Employees
- The addition of a Voided indicator on the Licensed Transfers -Inactive grids and Transfer Reports

Setting Default Facility

Metrc has released new functionality allowing users to change the default facility they are directed to upon logging into the system. If a default facility is not chosen by the user, the default facility will continue to be the first facility in the license list, which is organized alphabetically by license name – see **Figure 1**.

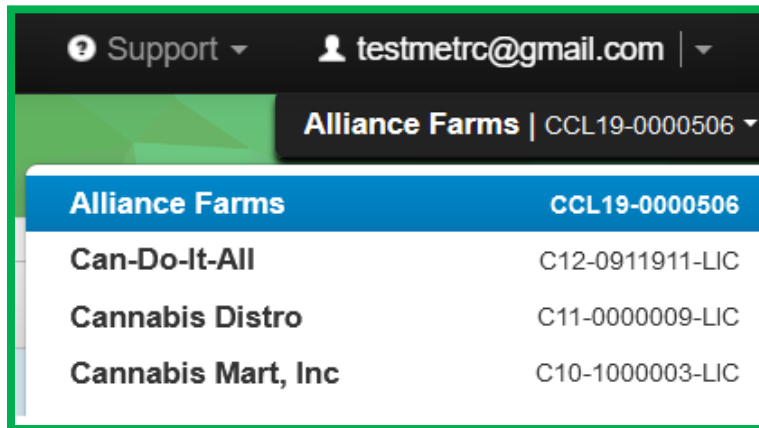


Figure 1: Available accounts in License drop-down

To set a default facility, click on either your username or the drop-down arrow to the right of it on the Navigational Toolbar to access your User Profile – see **Figure 2**.

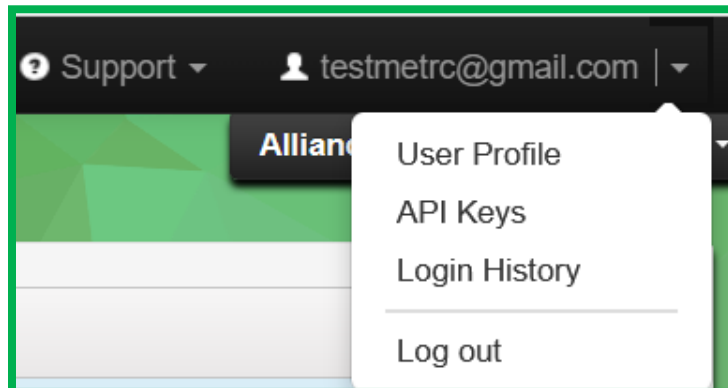
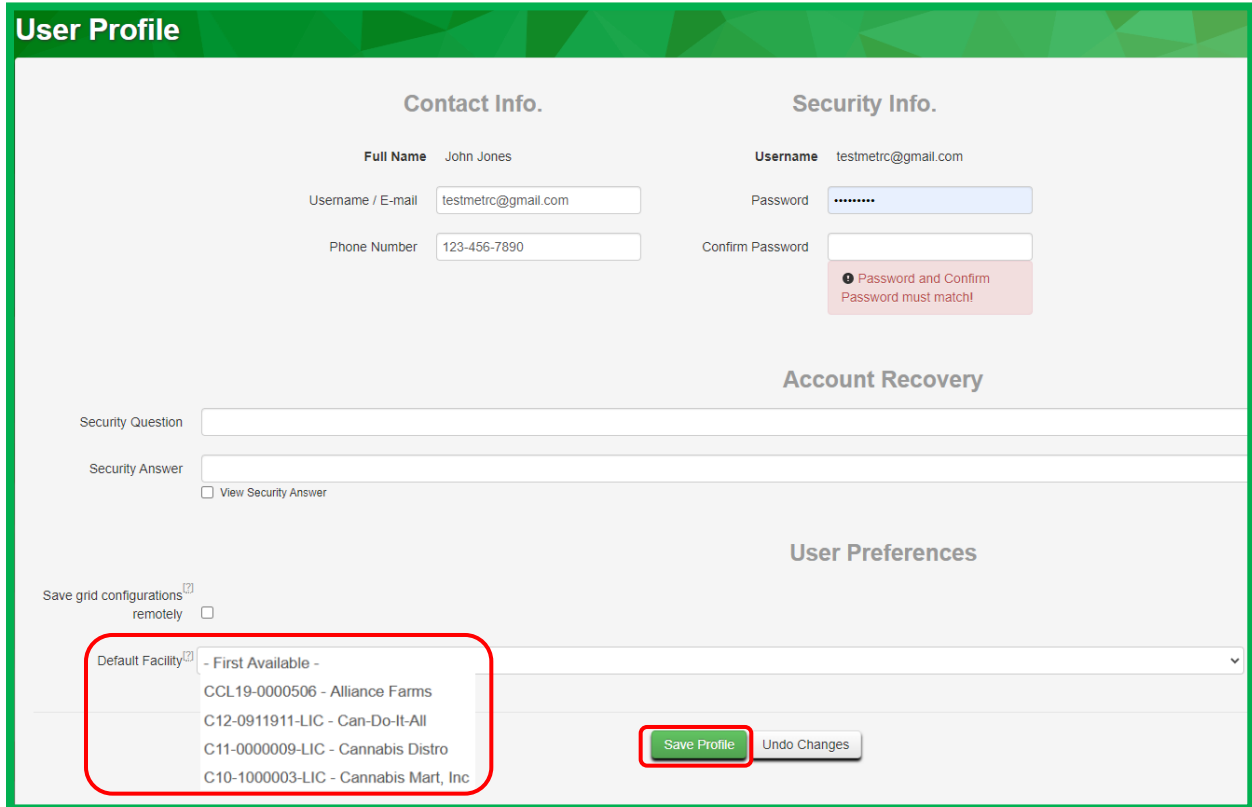


Figure 2: Accessing User Profile

On the User Profile page, locate the Default Facility drop-down at the bottom of the screen and select the facility you would like to log into by default and then click the green Save Profile button – see **Figure 3**.



The screenshot shows the 'User Profile' page with the following sections:

- Contact Info.**
 - Full Name: John Jones
 - Username / E-mail: testmetric@gmail.com
 - Phone Number: 123-456-7890
- Security Info.**
 - Username: testmetric@gmail.com
 - Password: [Redacted]
 - Confirm Password: [Redacted]
 - Message: Password and Confirm Password must match!
- Account Recovery**
 - Security Question: [Redacted]
 - Security Answer: [Redacted]
 - View Security Answer
- User Preferences**
 - Save grid configurations remotely:
 - Default Facility: [Open Drop-down Menu]
 - First Available -
 - CCL19-0000506 - Alliance Farms
 - C12-0911911-LIC - Can-Do-It-All
 - C11-0000009-LIC - Cannabis Distro
 - C10-1000003-LIC - Cannabis Mart, Inc
 -

Figure 3: Default Facility drop-down

Additional View Permissions

Additional employee View permissions have been added for areas under the Transfers Menu and the Sales Menu, as well as the Employees grid found under the Admin Menu. Granting an employee the View permission allows an employee to see the data on a grid but take no action on that data.

The new View permissions can be set by a user with the Manage Employees permission when adding a new employee or editing an existing employee record.

To grant View permissions to an existing employee, go to the Admin area dropdown on the navigational toolbar and select the Employees option – **see Figure 4.**

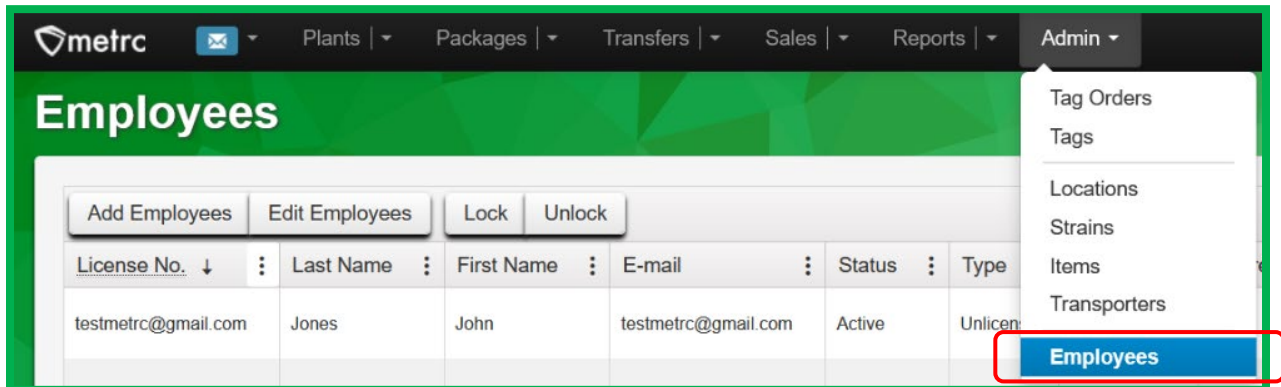


Figure 4: Employees option in Admin area dropdown

Next, highlight the employee you would like to edit permissions of and select the Edit Employees button to access the Edit Employees action window – **see Figure 5.**

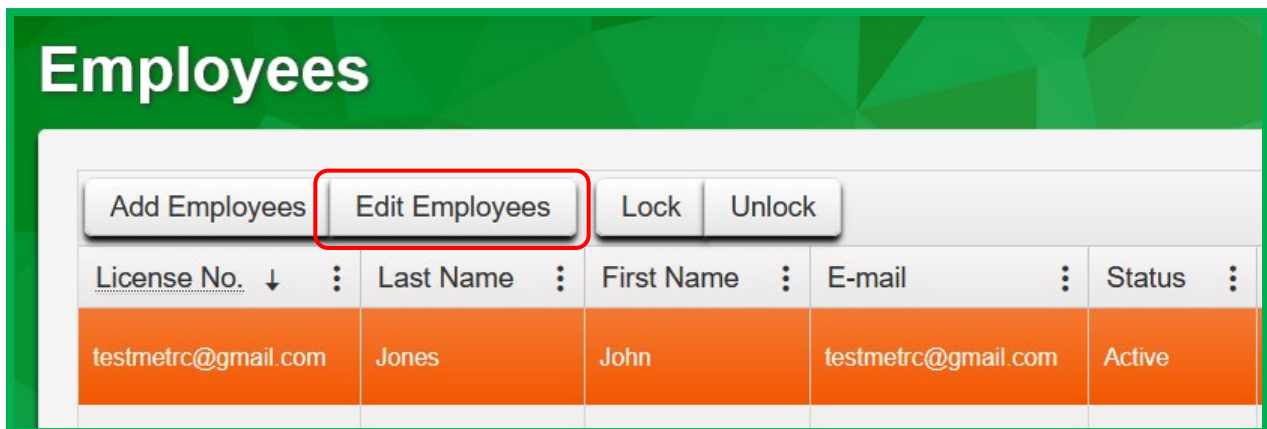


Figure 5: Edit Employees button

Within the Edit Employees action window, users now have the option to grant View only access to all areas under the Transfers Menu and Sales Menu and the Employees area under the Admin Menu – Employees. Users can select either View or Manage for these permissions, but not both. Selecting Manage will uncheck the View permission because Manage grants both manage and view permissions – see Figure 6.

Permissions	View	Manage
Packages Page		
Grids (req'd)	<input type="checkbox"/>	<input type="checkbox"/>
Inventory	<input type="checkbox"/>	<input type="checkbox"/>
Create/Submit/Disc.	<input type="checkbox"/>	<input type="checkbox"/>
Notes	<input type="checkbox"/>	<input type="checkbox"/>
Transfers Menu		
Licensed & External	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hub	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Menu		
Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Delivery	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Retailer Delivery	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Trips Menu		
All	<input type="checkbox"/>	<input type="checkbox"/>
Financials Menu		
All	<input type="checkbox"/>	<input type="checkbox"/>
Reports Menu		
All	<input type="checkbox"/>	<input type="checkbox"/>
Admin Menu		
Tag Orders	<input type="checkbox"/>	<input type="checkbox"/>
Tags	<input type="checkbox"/>	<input type="checkbox"/>
Strains	<input type="checkbox"/>	<input type="checkbox"/>
Items	<input type="checkbox"/>	<input type="checkbox"/>
Transporters	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 6: New View permissions for Transfers, Sales and Admin Menu

Access to Retailer Deliveries was previously controlled exclusively by the Sales Delivery permission. There are now separate View and Manage permissions for Retailer Delivery, although permissions to Retailer Delivery can only be granted if the comparable permission to Sales Delivery is also granted. When this change went live, users with the Manage Sales Delivery permission were automatically granted the Manage Retailer Delivery permission to maintain their existing access.

Increased Visibility of Voided Transfers

The Incoming and Outgoing Inactive tabs on the Licensed Transfers page have been updated to include voided transfers. Voided transfers can be identified by a Yes value in a new Voided column – see **Figure 7** and **Figure 8**.

Licensed Transfers Lily's Micro Grow | C12-0000002
California Te

New Transfer View Manifest

Incoming (1/7) **Inactive** Outgoing (10/14) Rejected (3) Inactive

Manifest ↑	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA	Voided
▶ 0000106201	C12-0000005-LIC Tibby's Micro Biz	Transfer	1	05/17/2022 05:00 am		05/18/2022 07:00 pm							Yes
▶ 0000130101	C12-0000005-LIC Tibby's Micro Biz	Wholesale Manifest	2	08/15/2023 04:27 pm		08/15/2023 06:27 pm		08/15/2023 04:36 pm					No

Figure 7: Voided Transfers on Licensed Transfer - Incoming Inactive Tabs

Licensed Transfers Lily's Micro Grow

New Transfer View Manifest

Incoming (1/7) Inactive Outgoing (10/14) Rejected (3) **Inactive**

Manifest ↑	Destination	Stops	Pkg's	Date Created	Voided
▶ 0000054502	C11-0000006-LIC (Lily's Green Distributing)	1	1	02/27/2020 01:40 pm	Yes
▶ 0000113004	C12-0000005-LIC (Tibby's Micro Biz)	1	5	10/27/2022 04:35 pm	No

Figure 8: Voided Transfers on Licensed Transfer - Outgoing Inactive Tabs

In addition, the Transfers Report, Transfers (Limited) Report and Whole Transfers Reports have all been updated to include a Voiced column as well – see **Figure 9 – Figure 11**.

metrc												Transfers	
												From 3/21/2020 To 3/21/2021	
Manifest	Origin Lic.	Origin Facility	Origin Facility Type	Dest. Lic.	Destination Facility	Dest. Facility Type	Type	Created	Created by User	Received	Received by User	Voiced	
0000056202	C12-0000002-LIC	Lily's Micro Grow	Cannabis - Microbusiness License	C12-0000002-LIC	Lily's Micro Grow	Cannabis - Microbusiness License	Transfer	3/24/2020	John Jones	3/24/2020	Sam Smith	No	
0000056302	C12-0000002-LIC	Lily's Micro Grow	Cannabis - Microbusiness License	CAL17-0000198	Lily's Green Farm	A-Medium Outdoor	Transfer	3/24/2020	John Jones			Yes	

Figure 9: Voiced Transfers on Transfers Report

metrc												Transfers (limited)			
												From 3/21/2020 To 3/21/2023			
Created	Manifest	Origin Lic.	Origin Facility	Origin Type	Dest. Lic.	Destination Facility	Dest. Type	Type	Received	Voiced	Item Category	Ship'd	Rcv'd	Ship'd	Rcv'd
3/24/2020	0000056303	C12-0000005-LIC	Tibby's Micro Biz	Cannabis - Microbusiness License	C11-0000009-LIC	Tibby's Distribution	Cannabis - Distributor License	Transfer		Yes	Flower	0.00	0.00	0.011 lb	0.00
3/26/2020	0000056401	C12-0000005-LIC	Tibby's Micro Biz	Cannabis - Microbusiness License	C12-0000005-LIC	Tibby's Micro Biz	Cannabis - Microbusiness License	Transfer	3/26/2020	No	Flower	0.00	0.00	110.2311 lb	0.00

Figure 10: Voiced Transfers on Transfers (Limited) Report

metrc												Wholesale Transfers (summary)			
												From 1/27/2020 To 10/27/2024			
Manifest	Origin Lic.	Origin Facility	Dest. Lic.	Destination Facility	Created	Received	Item	Item Category	Voiced	Amount	Ship'd	Rcv'd	Ship'd	Rcv'd	
0000052701	C12-0000002-LIC	Lily's Micro Grow	C9-0000004-LIC	Lily's Green Sales	2/18/2020	2/18/2020	Banana Split Kief	Kief	No	\$69.65S \$69.65R	0.00	0.00	0.0441 lb	0.0441 lb	
0000052702	C12-0000002-LIC	Lily's Micro Grow	C9-0000004-LIC	Lily's Green Sales	2/18/2020		Blueberry Muffin Leaf	Leaf	Yes	\$0.01S	0.00	0.00	0.0009 lb	0.00	
0000052801	C12-0000002-LIC	Lily's Micro Grow	C12-0000002-LIC	Lily's Micro Grow	2/18/2020	2/25/2020	Thin Mint Immature	Immature Plant	No	\$0.02S \$0.02R	3 ea	3 ea	0.00	0.00	
Totals:										\$69.66S \$69.67R	3 0.00	3 0.00	0.045 lb	0.0441 lb	

Figure 11: Voiced Transfers on Wholesale Transfers Report

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](#).

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

Thank you for your continued partnership.