

<b>Bulletin Number:</b> DC_IB_0064	<b>Distribution Date:</b> 04/23/2024	<b>Effective Date:</b> 04/09/2024
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Updates to User Functionality	
<b>Reason:</b> To inform licensees of important updates being made to the Metrc system.		

Greetings,

Metrc is pleased to provide information on the latest system enhancements that are now available, including:

- Transferred tab added to Packages Grid
- Ability to save Shipping Address in Metrc
- Zero Quantity Package Transfers

Please read on for more information regarding this new functionality.

## Transferred Tab added to Packages Grid

Previously within the Packages grid, users had access to four tabs where Packages were separated by their status within the license, including:

- Active
- On Hold
- Inactive
- In Transit

Each tab displays packages based on their status in relation to the license and it was determined that there is a fifth status that warranted the creation of an additional tab. Users with packages permission will now be able to access the historical list of packages that have transferred out of the selected facility in Metric via the new Transferred tab – **see Figure 1.**

Destination Lic.	Destination Fac.	Manifest No.	Package	S.H.	S.P.	Item	Category	Item Strain	Transferred LTS	Shipped Qty	Gross Weight	S.W.P.	Received Qty	R.W.P.	Status
402-X0001	CO LOFTY ESTABLISHMENT, LLC	0000000025	ABCDEF012345670000012485	2017-12-26-Harvest Room-H		Buds - Spring Hill Kush	Change Buds	Spring Hill Kush		11 oz			11 oz		Accept
402-X0001	CO LOFTY ESTABLISHMENT, LLC	0000000025	ABCDEF012345670000012488	2017-12-26-Harvest Room-M		Buds - Spring Hill Kush	Change Buds	Spring Hill Kush		15 oz			15 oz		Accept
403R-X0001	CO LOFTY ESTABLISHMENT, LLC	0000001301	ABCDEF012345670000013778			Buds - Purple Dream	FlowerBuds	Purple Dream	NotRequired	200 g	200 g		200 g		Accept
403R-X0001	CO LOFTY ESTABLISHMENT, LLC	0000001301	ABCDEF012345670000013778			Buds - Purple Dream	FlowerBuds	Purple Dream	NotRequired	200 g	200 g		200 g		Accept

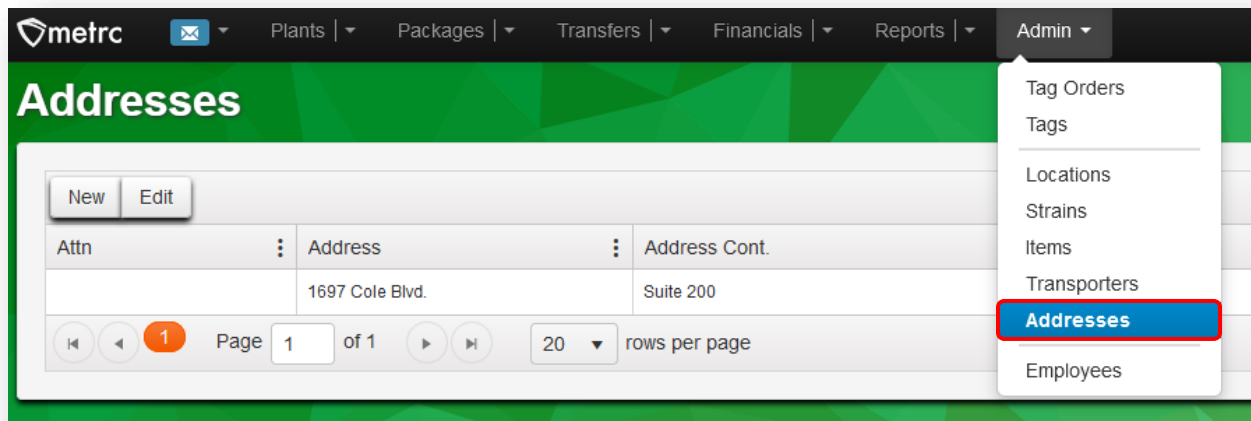
**Figure 1: New Transferred tab in Packages grid**

## **Ability to save Shipping Addresses in Metrc**

When placing a New Tag Order, users previously had to manually enter their address every time they placed a tag order. This update introduces the ability to save shipping addresses in Metrc, streamlining the tag ordering process. There are two main areas where shipping addresses can be saved, created, and edited – the Addresses grid or the New Tag Order action window.

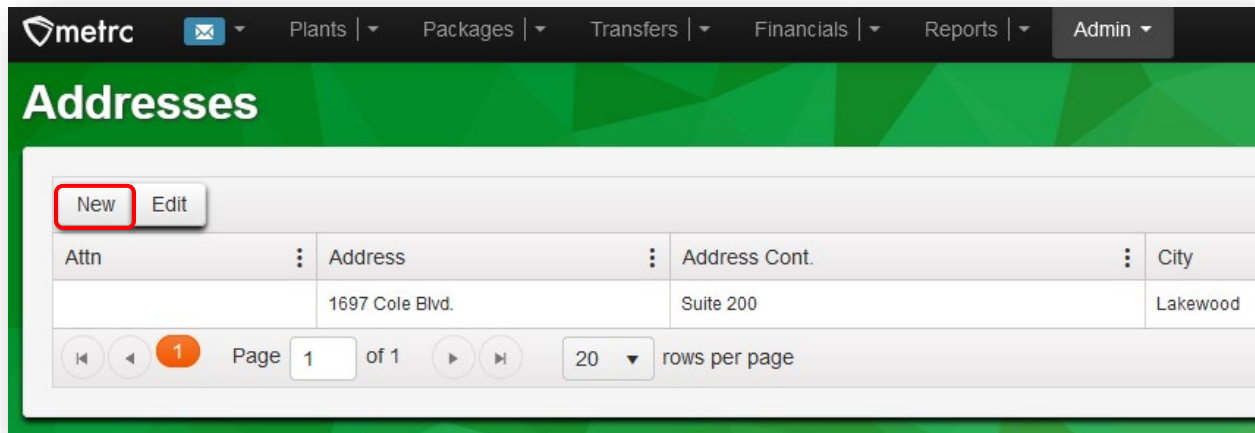
### **Option 1 – Addresses grid**

To access the new Addresses grid, select the Admin area dropdown in the navigational toolbar and select the Addresses option – **see Figure 2.**



**Figure 2: Addresses option in Admin dropdown**

From the Addresses grid, select the New button to add a new address – **see Figure 3.**



**Figure 3: New button to add a new address**

After selecting the New button, the New Shipping Address action window will appear where a new address can be added, saved, and/or set as a default – see **Figure 4**.

The image shows a 'New Shipping Address' dialog box. It contains the following fields: Contact Name (Facility), Phone No. (555-555-5555), Ship Address \* (123 Boulevard), Address Cont. (empty), City (Washington), and State + Zip (DC, 20015). There is a checkbox for 'set as default' and a note: '\* Tags cannot be shipped to P.O. Boxes'. At the bottom are 'Check Address' and 'Cancel' buttons.

**Figure 4: Adding a New Shipping Address**

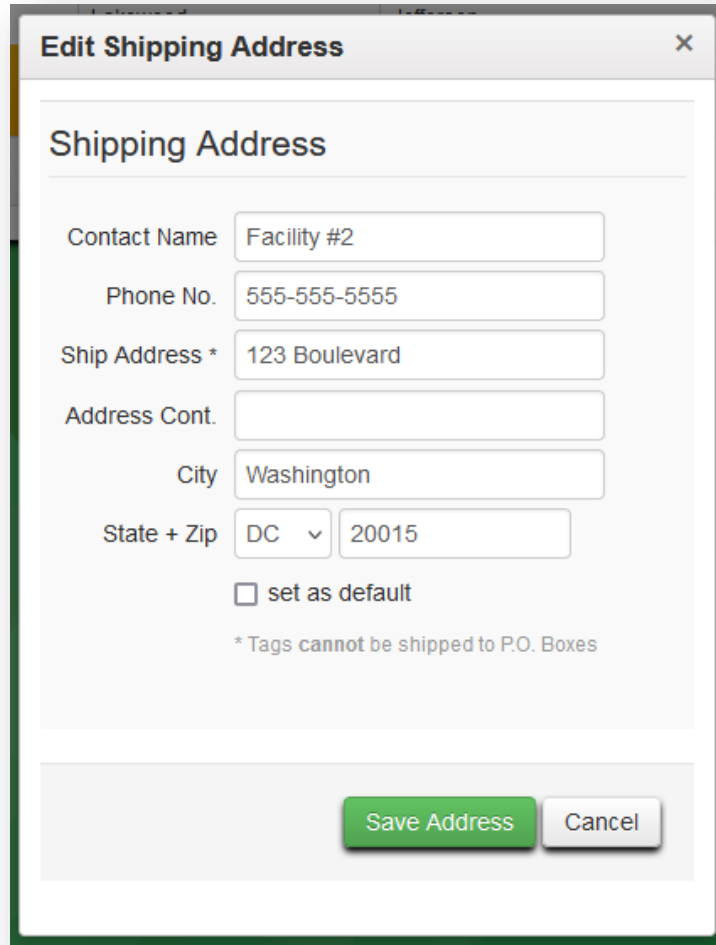
From the Addresses grid, users can also edit addresses. Highlight the address to be edited, then select the Edit button to access the Edit Shipping Address action window – see **Figure 5**.

The image shows the 'Addresses' grid in the Metrc application. The 'Edit' button is highlighted with a red box. The grid contains two rows of address data. The second row is highlighted in orange.

Attn	Address	Address Cont.	City
	1697 Cole Blvd.	Suite 200	Lakewood
Facility	123 Boulevard		Washington

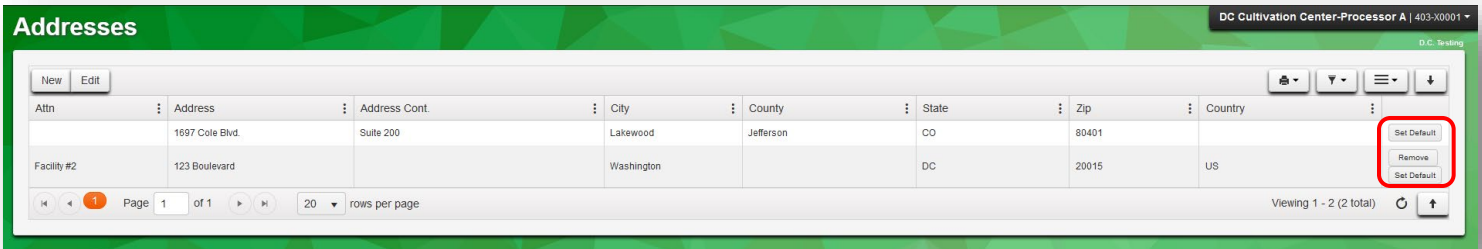
**Figure 5: Edit button to edit saved address**

In the Edit Shipping Address action window, currently saved addresses can be updated and/or set as a default – **see Figure 6.**



**Figure 6: Edit Shipping Address action window**

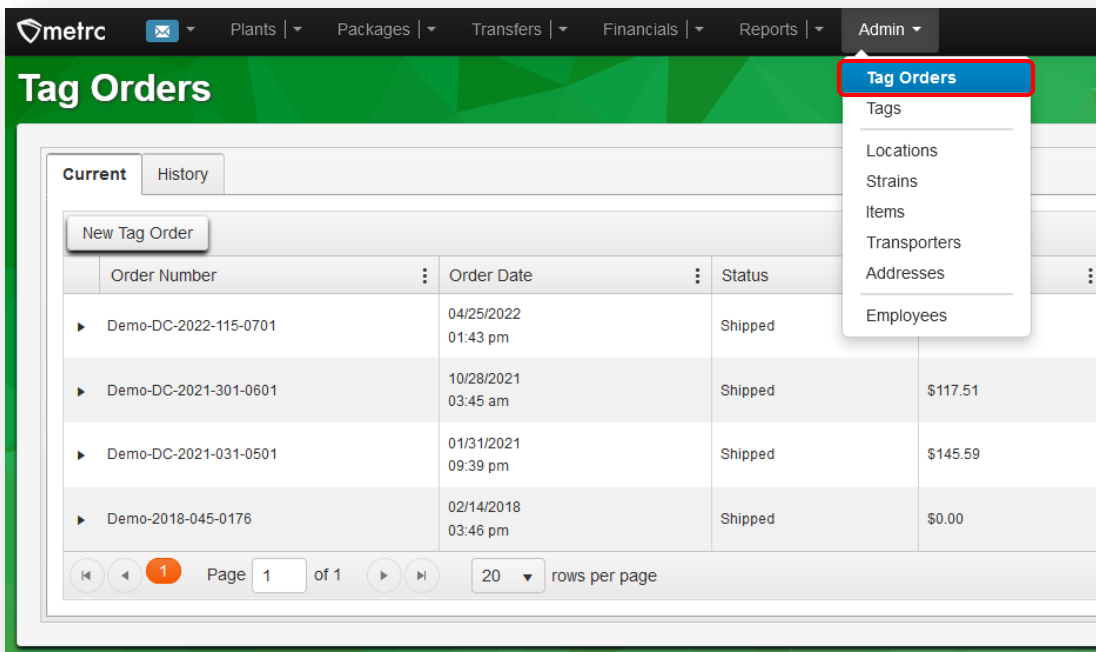
Lastly, if a default shipping address is not set in either the Edit or New Shipping Address action windows, the default address can be set directly from the Addresses grid. In addition, with the exception of the mailing address which is a non-editable option, a shipping address can be removed using the “Remove” button. A maximum of three additional shipping addresses can be stored, and once reached, users are prompted to remove an existing address before adding a new one – **see Figure 7.**



**Figure 7: Remove or Set Default address in Addresses grid**

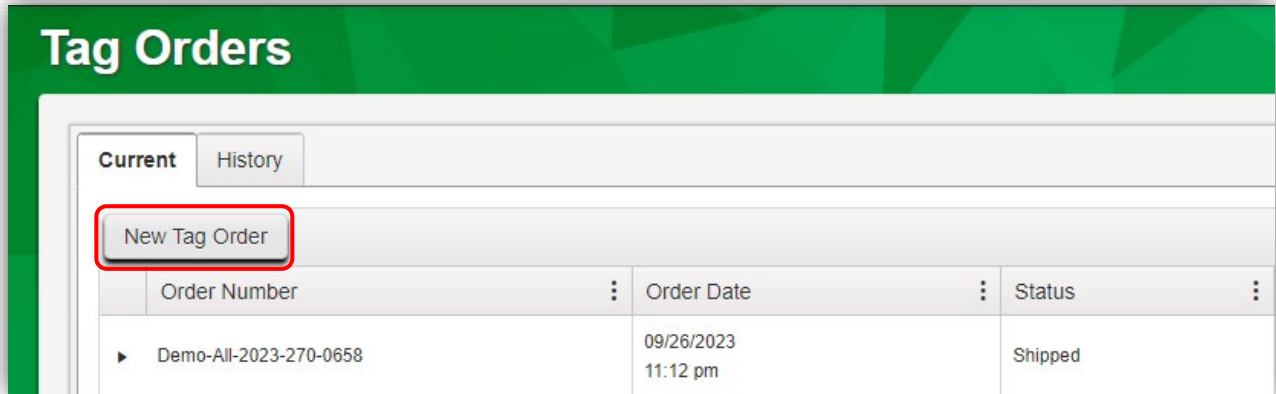
**Option 2 – New Tag Order action window**

The same functionality found in the Addresses grid can be accessed directly in the New Tag Order action window. First, select the Tag Orders option from the Admin area dropdown in the navigational toolbar – **see Figure 8.**



**Figure 8: Accessing the Tag Orders grid**

From the Current Tag Orders grid, select the New Tag Order button to access the New Tag Orders action window – **see Figure 9.**



**Figure 9: New Tag Order button**



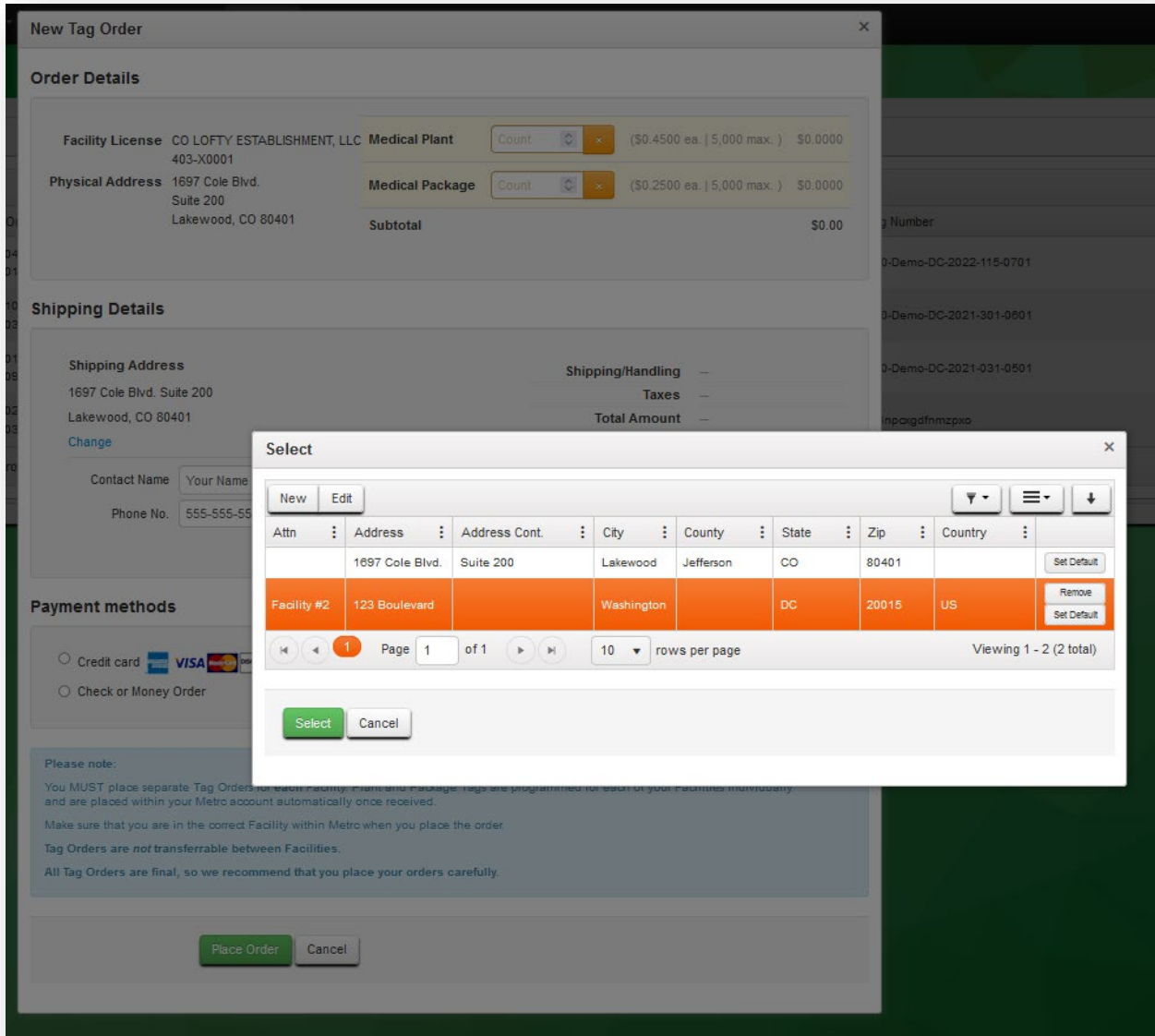
From the New Tag Order action window, users will notice there are no longer fields to input a shipping address. The address that appears automatically is whichever address is saved as the default shipping address – see **Figure 10**.

The screenshot shows a 'New Tag Order' window with the following sections:

- Order Details:** Facility License (CO LOFTY ESTABLISHMENT, LLC 403-X0001), Physical Address (1697 Cole Blvd. Suite 200, Lakewood, CO 80401), Medical Plant (Count: 1, \$0.4500 ea. | 5,000 max. | \$0.0000), Medical Package (Count: 1, \$0.2500 ea. | 5,000 max. | \$0.0000), and Subtotal (\$0.00).
- Shipping Details:** Shipping Address (1697 Cole Blvd. Suite 200, Lakewood, CO 80401, with 'Lakewood, CO 80401' highlighted in a red box and a 'Change' link below it), Shipping/Handling (--), Taxes (--), and Total Amount (--). Contact Name (Your Name) and Phone No. (555-555-5555) are also present.
- Payment methods:** Radio buttons for 'Credit card' (with VISA, MasterCard, and DISCOVER logos) and 'Check or Money Order'.
- Please note:** A light blue box containing instructions: 'You MUST place separate Tag Orders for each Facility. Plant and Package Tags are programmed for each of your Facilities individually and are placed within your Metro account automatically once received. Make sure that you are in the correct Facility within Metro when you place the order. Tag Orders are not transferrable between Facilities. All Tag Orders are final, so we recommend that you place your orders carefully.'
- Buttons:** 'Place Order' and 'Cancel' buttons at the bottom.

**Figure 10: New Tag Order action window**

To edit the shipping address, click the blue Change link to access the Address Book action window, where shipping addresses can be managed efficiently, including add, edit, and remove shipping address functionality – see **Figure 11**.



**Figure 11: Address Book action window**

### Zero Quantity Package Transfers

Metric has updated the transfer functionality so packages with a negative or zero quantity are unable to be added to a transfer. If a current transfer exists with a negative or zero quantity package, then the receiving facility will be required to reject the package. If the receiving facility tries to accept the transfer with a zero or negative quantity package, an error message will appear – see **Figure 12**.

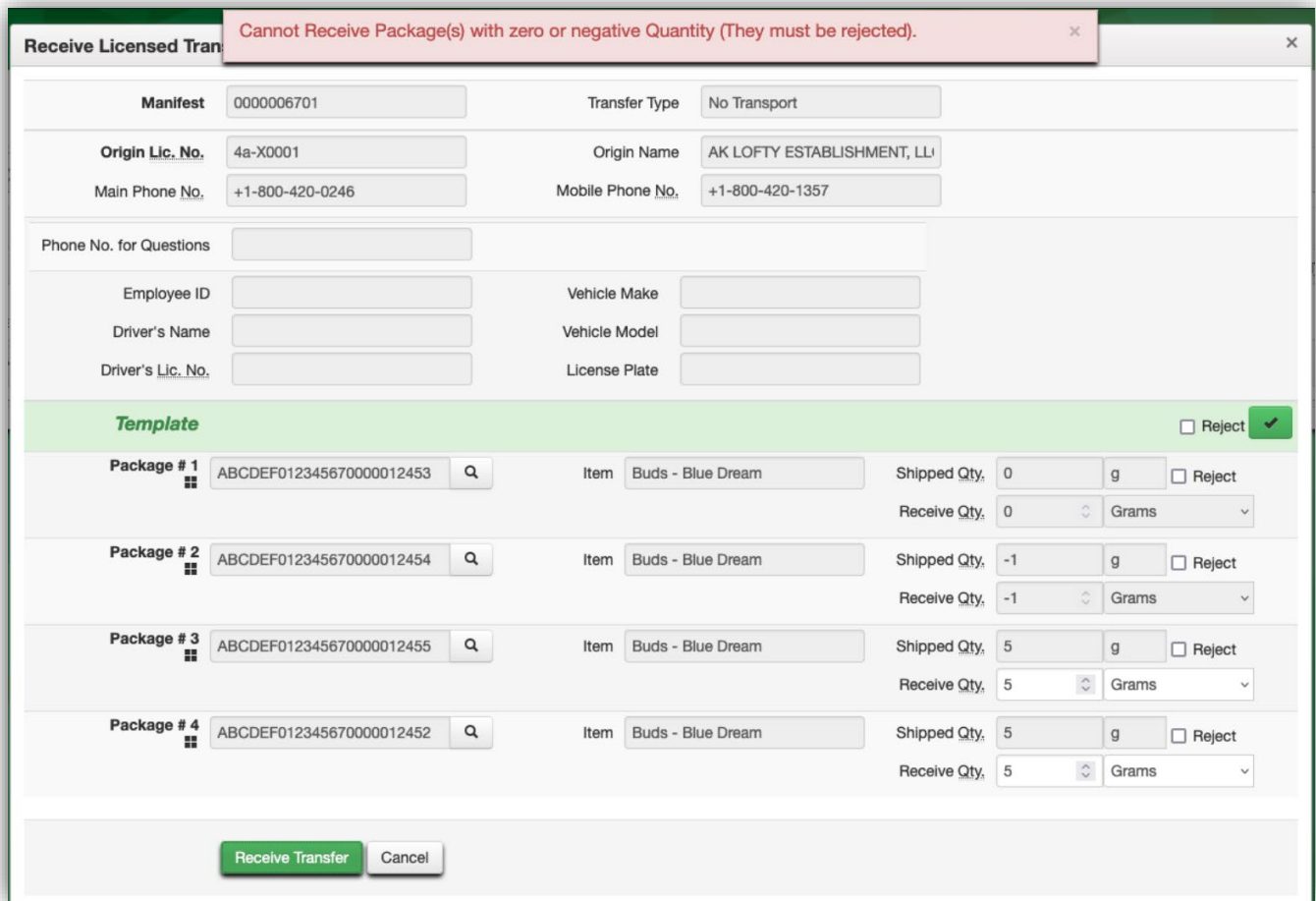


Figure 12: Error message when accepting zero quantity package

## 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 by navigating to [Support.Metrc.com](https://Support.Metrc.com), or from the Metrc System, click Support and navigate to [support.metrc.com](https://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.

### Metrc Learn

Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new [Metrc Learn](#) LMS is simple through multiple convenient locations:

#### ***From within the Metrc system***

- Navigate to the Support area dropdown on the navigational toolbar and select “Sign up for Training” to register.

#### ***From the Metrc website***

- Navigate to your [state’s partner page](#) and scroll down to the “Metrc’s Training Resources” section to find the link.

Also, save the link – [learn.metrc.com](https://learn.metrc.com) – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

### Access additional resources

In the Metrc system, click on the Support area dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more.

Thank you for your continued partnership.