

Bulletin Number: MD_IB_0084	Distribution Date: 04/23/2024	Effective Date: 04/09/2024			
Contact Point: Metrc Support	Subject: Updates to User Functionality				
Reason: 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 Metrc via the new Transferred tab – **see Figure 1**.

ctive On Hold	Inactive I In Tran	nsit Transferred														
														A.	••][≡•	+
Destination Lic.	Destination Fac.	Manifest No.	Package :	<u>S.H.</u> :	S.P. :	ltem :	Category :	Item Strain	Transferred LTS	Shipped Qty	Gross Weight	S.W.P.	Received Qty	R.W.P	Status :	ATD :
405R-X0001	CO PERCEPTIVE TESTING LABS, LLC	000003401	ABCDEF012345670000016096		ABCDEF012345670000016095	BHO OII	Concentrate (Weight) (Medical Only)		SubmittedForTesting	1 g			1 g		Accepted	
405R-X0001	CO PERCEPTIVE TESTING LABS, LLC	000003801	ABCDEF012345670000016098		ABCDEF012345670000016097	BHO Oil	Concentrate (Weight) (Medical Only)		SubmittedForTesting	1 g			1 g		Accepted	
405R-X0001	CO PERCEPTIVE TESTING LABS, LLC	000003802	ABCDEF012345670000016099		ABCDEF012345670000016091	BHO OI	Concentrate (Weight) (Medical Only)		SubmittedForTesting	1 g			1 g		Accepted	
405R-X0001	CO PERCEPTIVE TESTING LABS, LLC	000005301	ABCDEF012345670000016109		ABCDEF012345670000016105	BHO Oil .5 g Cartridge	Concentrate (Each) (Medical Only)		SubmittedForTesting	1 ea			1 ea		Accepted	
402R-X0001	CO LOFTY ESTABLISHMENT, LLC	000005401	ABCDEF012345670000016106		ABCDEF012345670000016105	BHO Oil .5 g Cartridge	Concentrate (Each) (Medical Only)		TestPassed	50 ea	1g	\$1.00	50 ea	\$1.00	Accepted	
402R-X0001	CO LOFTY ESTABLISHMENT, LLC	0000006401	ABCDEF012345670000016105		ABCDEF012345670000016104	BHO Oil .5 g Cartridge	Concentrate (Each) (Medical Only)		TestPassed	199 ca		\$1,200.00	199 ca	\$1,200.00	Accepted	

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.**

🛇metrc 💌 Packa	ges	Admin -
Addresses		Tag Orders Tags
New Edit		Locations Strains
Attn :	Address :	ltems
	1697 Cole Blvd.	Transporters
R I Page 1	of 1 🕨 🕨 20 🔻 rows per	Addresses
I age		Employees

Figure 2: Addresses option in Admin dropdown



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

ddresses				
New Edit				
Attn	:	Address	:	Address Cont.
		100 Oil Road		
Pag	e 1 of 1	► H 20 ▼ rc	ows per page	

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**.

New Shipping	Address ×								
Shipping Ac	ldress								
Contact Name	Facility								
Phone No.	555-555-5555								
Ship Address *	123 Drive								
Address Cont.	Address Cont.								
City	Anytown								
State + Zip	State + Zip MD v 21202								
	set as default								
	* Tags cannot be shipped to P.O. Boxes								
	Check Address Cancel								
_									

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.**

Smetrc 🔽 - Packa	iges	Admin -	
Addresses			
New Edit			
Attn :	Address :	Address Cont.	City :
	1697 Cole Blvd.	Suite 200	Lakewood
Facility			
Page 1	of 1 🕨 🕨 20 🔻 rows per	page	

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.**

Contact Name	Facility #2
Phone No.	555-555-5555
Ship Address *	123 Drive
Address Cont.	
City	Anytown
State + Zip	MD v 21202
	set as default
	* Tags cannot be shipped to P.O. Boxes

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.**

tn	: Address	: Address Cont.	: City	: County	: State	: Zip	: Country	
	1697 Cole Blvd.	Suite 200	Lakewood	Jefferson	co	80401		Set Default
siity #2	123 Drive		Anytown		MD	21202	US	Remove Set Default

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.**

ag Orders			Tag Orders	
ay orders			Tags	
			Strains	-
Current History			Items	
			Item Brands	
New Tag Order			Transporters	
Order Number	:	Order Date	Addresses	
		09/26/2023	Employees	

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.**

Tag Orders		
Current History		
New Tag Order	Order Date	Status :
Demo-All-2023-270-0658	09/26/2023 11:12 pm	Shipped

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**.

New Tag Order								×
Order Details								
Facility License	CO MISHMASH IMMERSION, LLC	Medical Package	Count	0 ×	(\$0.2500 e	a. 5,000 max.)	\$0.0000	
Physical Address	404-X0001 1697 Cole Blvd. Suite 200 Lakewood, CO 80401	Subtotal					\$0.00	
Shipping Details								
Shipping Addre 1697 Cole Blvd. S Lakewood, CO 80 Change Contact Name Phone No Payment method	Suite 200 0401 e <u>Your Name</u> 555-555-5555				g/Handling Taxes al Amount			
Credit card								
and are placed within Make sure that you are Tag Orders are not tra	arate Tag Orders for each Facility. F your Metrc account automatically o e in the correct Facility within Metro ansferrable between Facilities. Ial, so we recommend that you pla	once received. owhen you place the c	order.	ammed for e	ach of your F	acilities individua	lly	
	Place Order Cancel							

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.**

New Tag Order								×	Ζ.	
Order Details										
Facility License	CO MISHMAS 404-X0001	H IMMERSION, LLC	Medical Package	Count 🗘	× (\$0.2500) ea. 5,000 r	nax.) \$0.00		: Track	
Physical Address	1697 Cole Blv Suite 200 Lakewood, Cl		Subtotal				\$0	.00)jctfrsgvsecwnzk
Shipping Details)djh11z4wnkpt6uk)sab17xlfkjlzqo8
Shipping Addre	ess			Sh	ipping/Handling	J				
1697 Cole Blvd Lakewood, CO	Select									×
Change	New Ed	it						L	••][=- +
Contact Na	Attn :	Address :	Address Cont.	City :	County :	State	: Zip	: Cou	ntry :	
Phone I		1697 Cole Blvd.	Suite 200	Lakewood	Jefferson	co	80401			Set Default
-	Facility #2	123 Drive		Anytown		MD	21202	US		Set Default
Payment metho		Page 1	of1 F	10 v ro	ws per page				Viewing 1	- 2 (2 total)
Credit card	Select	Cancel								
			lant and Package Tags	are programme	d for each of your	Facilities ind	ividually			
and are placed within Make sure that you are			once received. when you place the ord	ler.						
Tag Orders are not tra			ce your orders carefull							
All lag orders are lin	ai, 30 we reco	ninend that you pro	oe your orders careiun	y.						
	Place (Order Cancel								
_		_								

Figure 11: Address Book action window



Zero Quantity Package Transfers

Metrc 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**.

Manifest	0000006701 4a-X0001 +1-800-420-0246		Transfer Type Origin Name Mobile Phone <u>No.</u>		No Transport				
Origin Lic. No.					AK LOFTY ESTABLISHMENT, LL				
Main Phone <u>No.</u>					+1-800-420-1357				
hone No. for Questions									
Employee ID			Vehicle Make						
Driver's Name			Vehicle Model						
Driver's Lic. No.			License Plate						
Template									Reject
Package # 1	ABCDEF012345670000012453	۹	ltem	Buds - B	lue Dream	Shipped Qty.	0	g	Reject
						Receive <u>Qty.</u>	0 0	Grams	~
Package # 2	ABCDEF012345670000012454	٩	Item	Buds - B	lue Dream	Shipped Qty.	-1	g	Reject
						Receive Qty.	-1 0	Grams	~
Package # 3	ABCDEF012345670000012455	٩	Item	Buds - B	lue Dream	Shipped Qty.	5	g	Reject
						Receive Qty.	5 \$	Grams	~
Package # 4	ABCDEF012345670000012452	۹	Item	Buds - B	lue Dream	Shipped Qty.	5	g	Reject
						Receive Qty.	5 0	Grams	~

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 <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 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 <u>state's partner page</u> and scroll down to the "Metrc's Training Resources" section to find the link.

Also, save the link – *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.