

Bulletin Number: NJ_IB_0017	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**.

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Destination Lic.	Destination Fac.	Manifest No.	Package	<u>S.H.</u>	<u>S.P.</u>	Item	Category	Item Strain	Transferred LTS	Shipped Qty	Gross Weight	S.W.P.	Received Qty :	R.W.P :	Status :	ATD
RC0003-D	Acme Dispensary	0000001901	1A4FF0100000C900000001	Harvest Metro Bliss 05182022		Metrc Bliss - Buds	Bud/Flower	Metro Bliss	TestPassed	3,195 g			3,195 g		Accepted	
RC0003-D	Acme Dispensary	0000002101	1A4FF0100000CA00000001	Harvest Metrc Bliss 05182022	1A4FF0100000C900000008	Garden State Ganja - BHO Oil	Concentrate		NotSubmitted	400 g			400 g		Accepted	
RC0003-D	Acme Dispensary	000002101	1A4FF0100000CA00000001	Harvest Metro Bliss 05182022	1A4FF0100000C900000000	Garden State Ganja - BHO Oil	Concentrate		NotSubmitted	400 g			400 g		Accepted	
RC0003-D	Acme Dispensary	0000003101	1A4FF0100000CA00000013	Harvest Metrc Bliss 05182022	1A4FF0100000CA00000011	Brownies 40mg	Edibles		NotSubmitted	50 es		\$25.00	50 es	\$25.00	Accepted	
H 4 1 F	Page 1 of 1 🕨	H 20 V	rows per page											Viewing	1 - 3 (3 total)	0 +

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.** 

ddresses		Tag Orders Tags	
New Edit		Locations Strains	
Attn	Address	Items Transporters	Address Cont.
Page 1	f1	Addresses Tows per page	

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**.

Shipping Ac	ldress
Contact Name	Facility
Phone No.	555-555-5555
Ship Address *	123 Street
Address Cont.	
City	Anytown
State + Zip	NJ ~ 12345
	set as default
	* Tags cannot be shipped to P.O. Boxes
	This address has not been verified
	Save 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.

metrc Package		sfers   + Reports   + Admin +				
ddresses						
New Edit						
Attn	:	Address	Address Cont.	:	City	:
		100 Oil Road			Jersey City	
Facility						
H 4 1 Pa	age 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.** 

Shipping Ac	Idress
Contact Name	Facility #2
Phone No.	555-555-5555
Ship Address *	123 Street
Address Cont.	
City	Anytown
State + Zip	NJ v 12345
	set as default
	* Tags cannot be shipped to P.O. Boxes
	Save Address Cancel

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.** 

ew Edit	Address	Address Cont.	: City	: County	: State	: Zip	: Country	
	100 Oil Road		Jersey City		NJ	7030		Set Default
lity	123 Street		Anytown		NJ	12345	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**.

Smetrc Packages - Transfers	s	- Admin -	
Tag Orders		Tag Orders	
lag olders		Tags	
Current History		Strains Items Item Brands	
New Tag Order		Transporters	
Order Number	: Order Date	Addresses	:
▶ Demo-All-2023-270-0658	09/26/2023 11:12 pm	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**.

ag O	rders			1		
Current	History					
	Tag Order	:	Order Date	:	Status	:
► De	emo-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	Acme Processor CRC0002-P	Cannabis Package	Count	0 ×	(\$0.2500 ea	a. 5,000 max.)	\$0.0000
Physical Address		Subtotal					\$0.00
Shipping Details							
Shipping Addre 100 Oil Road Jersey City, NJ 7 Change					/Handling Taxes I Amount		
Contact Nam Phone No							
ayment method	Is						
Credit card	VISA and a second						
and are placed within Make sure that you an Tag Orders are not tr	arate Tag Orders for each your Metrc account autor e in the correct Facility wit ansferrable between Fac nal, so we recommend th	natically once received. hin Metrc when you plac ilities.	e the order		i for each of y	rour Facilities ind	ividually
	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 Ta	ig Order								× _
Order	Details								ac
Fac	ility License	Acme Processor CRC0002-P	Cannabis	Package	2 🛛		(\$0.2500 €	a.   5,000 max. )	
Physi	ical Address	100 Oil Road Jersey City, NJ 7030	Subtotal						\$0.50
Shippii	ng Details								
ect									×
ew Ed	_								
tn 🚦	Address 100 Oil Road	Address Cont.	: City Jersey	County		State	2ip	: Country	Set Default
cility #2	123 Street		Anyto			41	08816	US	Remove Set Default
	Page 1	of 1 (F) (H)	10	rows per p	age			Viev	ving 1 - 2 (2 total)
and are Make su Tag Ord	JST place sepa e placed within ure that you are ders are not tra	rate Tag Orders for each your Metrc account auton in the correct Facility wit insferrable between Fac al, so we recommend the	natically one hin Metro w ilities.	e received. hen you place t	he order.	ogrammei	d for each of	your Facilities in	divîdually
		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		Transfer Type		No Transport				
Origin Lic. No.	4a-X0001		Origin Name Mobile Phone <u>No.</u>		AK LOFTY ESTAB	LISHMENT, LLI			
Main Phone No.	+1-800-420-0246				+1-800-420-1357				
none No. for Questions									
Employee ID			Vehicle Make						
Driver's Name				Vehicle Model					
Driver's Lic. No.			License Pla						
Template									Reject
Package # 1	ABCDEF012345670000012453	٩	Q Item		lue Dream	Shipped Qty.	0	g	Reject
						Receive Qty.	0 0	Grams	v
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	٩	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.