

<b>Bulletin Number:</b> OH_IB_0055	<b>Distribution Date:</b> 04/17/2024	<b>Effective Date:</b> 04/16/2024
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Updated Functionality Bulletin	
<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 will be available on 04/16/2024, including:

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

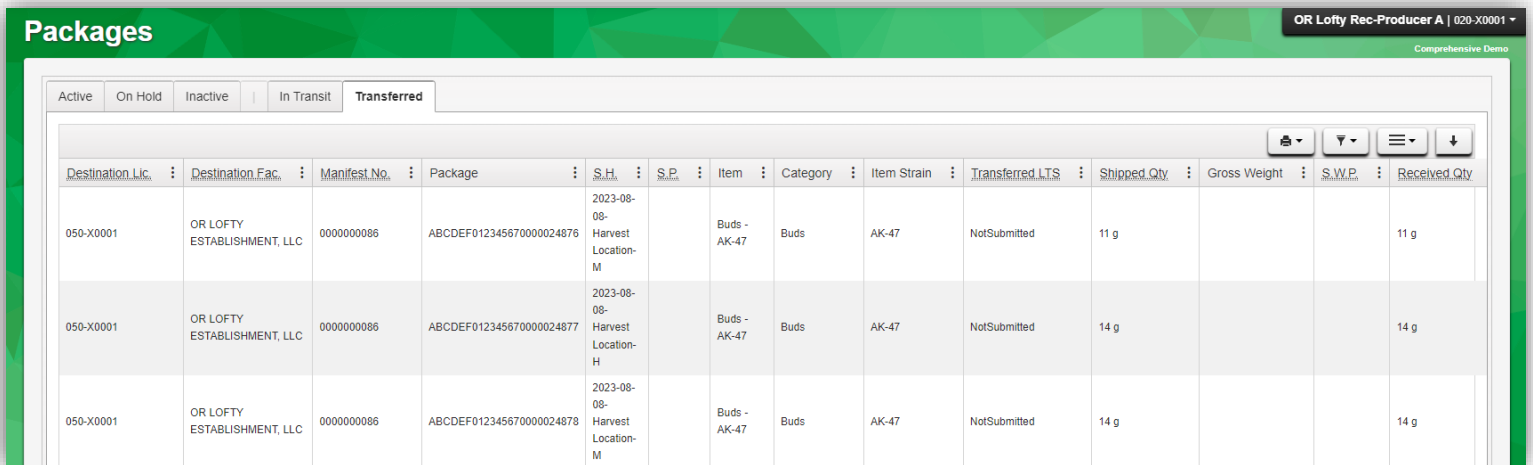
Please read on for more information regarding this new functionality.

## 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
- Inactive
- On Hold
- 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.**



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
050-X0001	OR LOFTY ESTABLISHMENT, LLC	0000000086	ABCDEF012345670000024876	2023-08-08-Harvest Location-M		Buds - AK-47	Buds	AK-47	NotSubmitted	11 g			11 g
050-X0001	OR LOFTY ESTABLISHMENT, LLC	0000000086	ABCDEF012345670000024877	2023-08-08-Harvest Location-H		Buds - AK-47	Buds	AK-47	NotSubmitted	14 g			14 g
050-X0001	OR LOFTY ESTABLISHMENT, LLC	0000000086	ABCDEF012345670000024878	2023-08-08-Harvest Location-M		Buds - AK-47	Buds	AK-47	NotSubmitted	14 g			14 g

**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 on the navigational toolbar and select the Addresses option – see Figure 2.

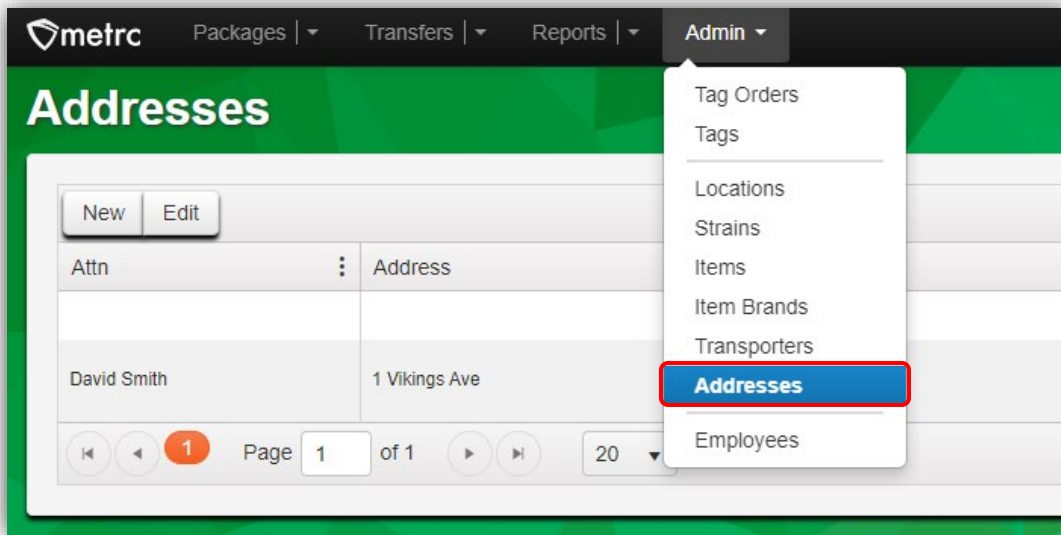


Figure 2: Addresses option in Admin dropdown

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

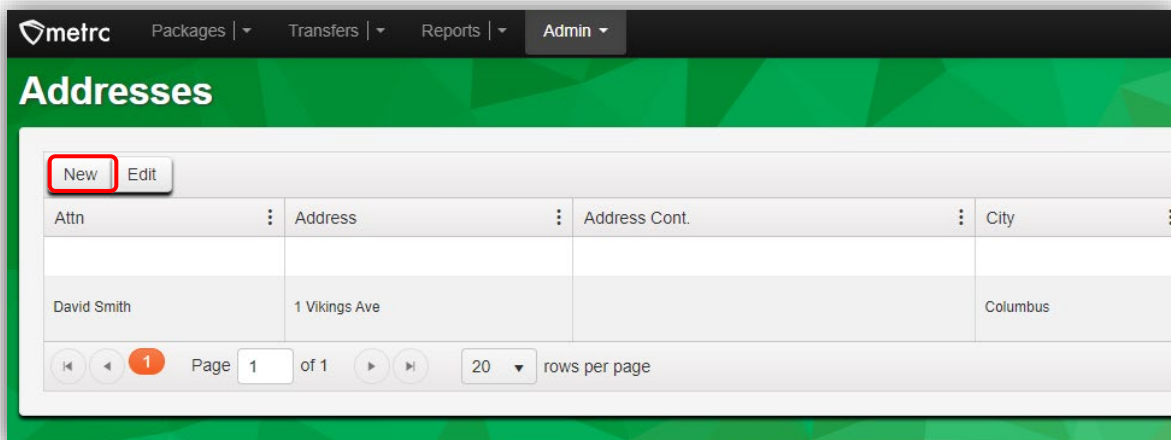


Figure 3: New button to add a new address

This will open the New Shipping Address action window to allow a new address to be added and even set as a default. Once all information has been entered, select the Check Address button to save the added address – **see Figure 4.**

The image shows a 'New Shipping Address' dialog box with the following fields: Contact Name, Phone No. (with an example 'ex. +1-123-456-7890'), Ship Address \*, Address Cont., City, and State + Zip (with a dropdown menu). 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. To edit an address, highlight the address to be edited, then select the Edit button – **see Figure 5.**

The screenshot shows the 'Addresses' section of the Metrc interface. At the top, there are navigation tabs: Packages, Transfers, Reports, and Admin. Below the title 'Addresses', there are 'New' and 'Edit' buttons. The 'Edit' button is highlighted with a red box. Below the buttons is a table with columns: Attn, Address, Address Cont., and City. A row is highlighted with a red box, containing the text: David Smith, 1 Vikings Ave, and Columbus. At the bottom of the grid, there are pagination controls: Page 1 of 1, 20 rows per page, and navigation arrows.

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

This will open the Edit Shipping Address action window for the currently saved addresses which can be updated and/or set as a default – see **Figure 6**.

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

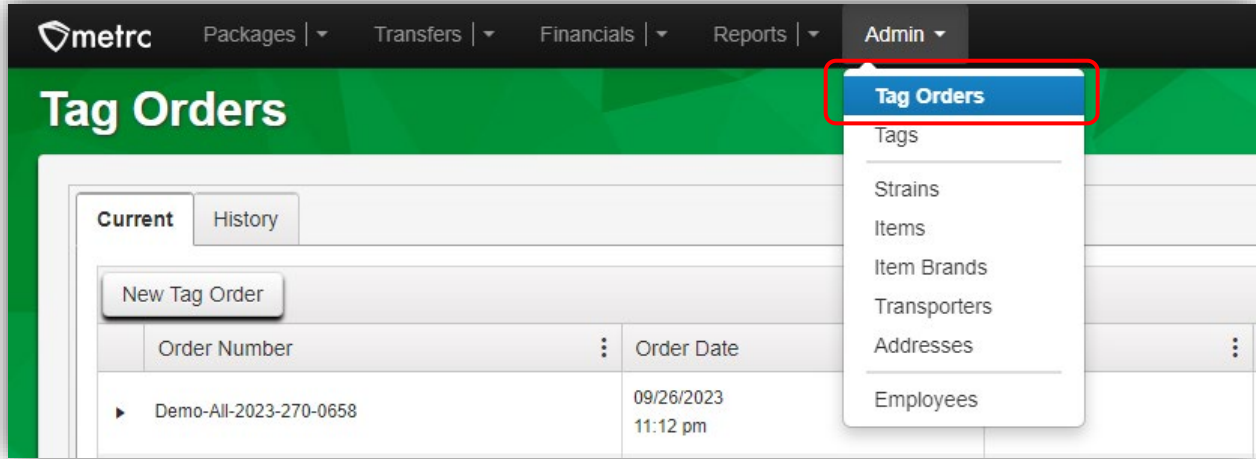
Lastly, if a default shipping address is not set in either the Edit or New Shipping Address action windows, the default address can be set directly from the Addresses grid. In addition, with the exception of the mailing address, which is a non-editable option, a shipping address can be removed using 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**.

Attn	Address	Address Cont.	City	County	State	Zip	Country	
David Smith	1 Vikings Ave		Columbus		OH	43004	US	 Set Default Remove Set Default

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

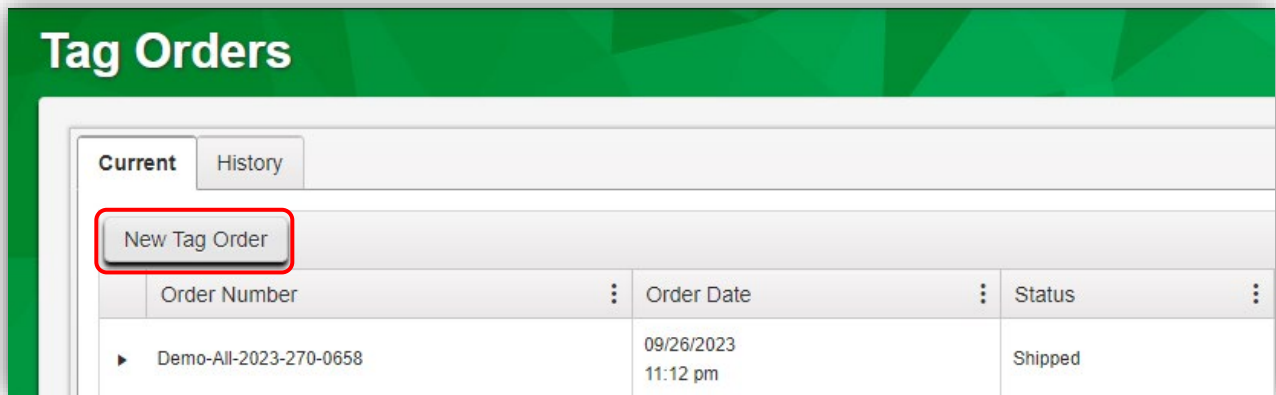
**Option 2 – New Tag Order action window**

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 on the navigational toolbar – see **Figure 8**.



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

From the 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.**

**New Tag Order**

**Order Details**

Facility License	OH Med Dispensary B 050-X0002	Medical Package Label	Count	(\$0.1700 ea.   5,000 max. )	\$0.0000
Physical Address	N/A	Medical Package	Count	(\$0.2500 ea.   5,000 max. )	\$0.0000
Subtotal					\$0.00

**Shipping Details**

Shipping Address

[Change](#)

Contact Name:

Phone No.:

Shipping/Handling: --

Taxes: --

Total Amount: --

**Payment methods**

Credit card

Check or Money Order

**Please note:**

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.

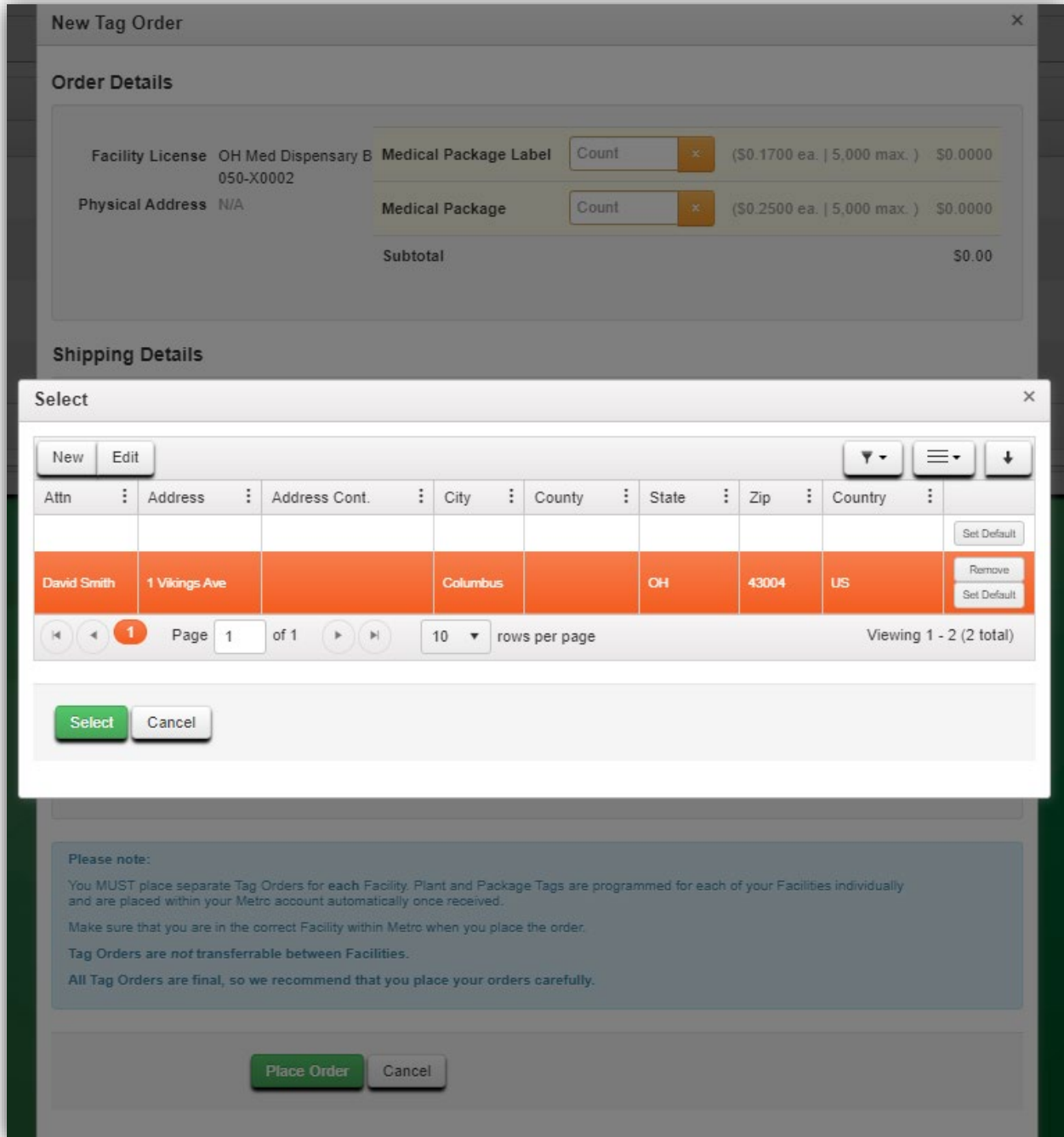
Tag Orders are *not* transferrable between Facilities.

All Tag Orders are final, so we recommend that you place your orders carefully.

**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.**

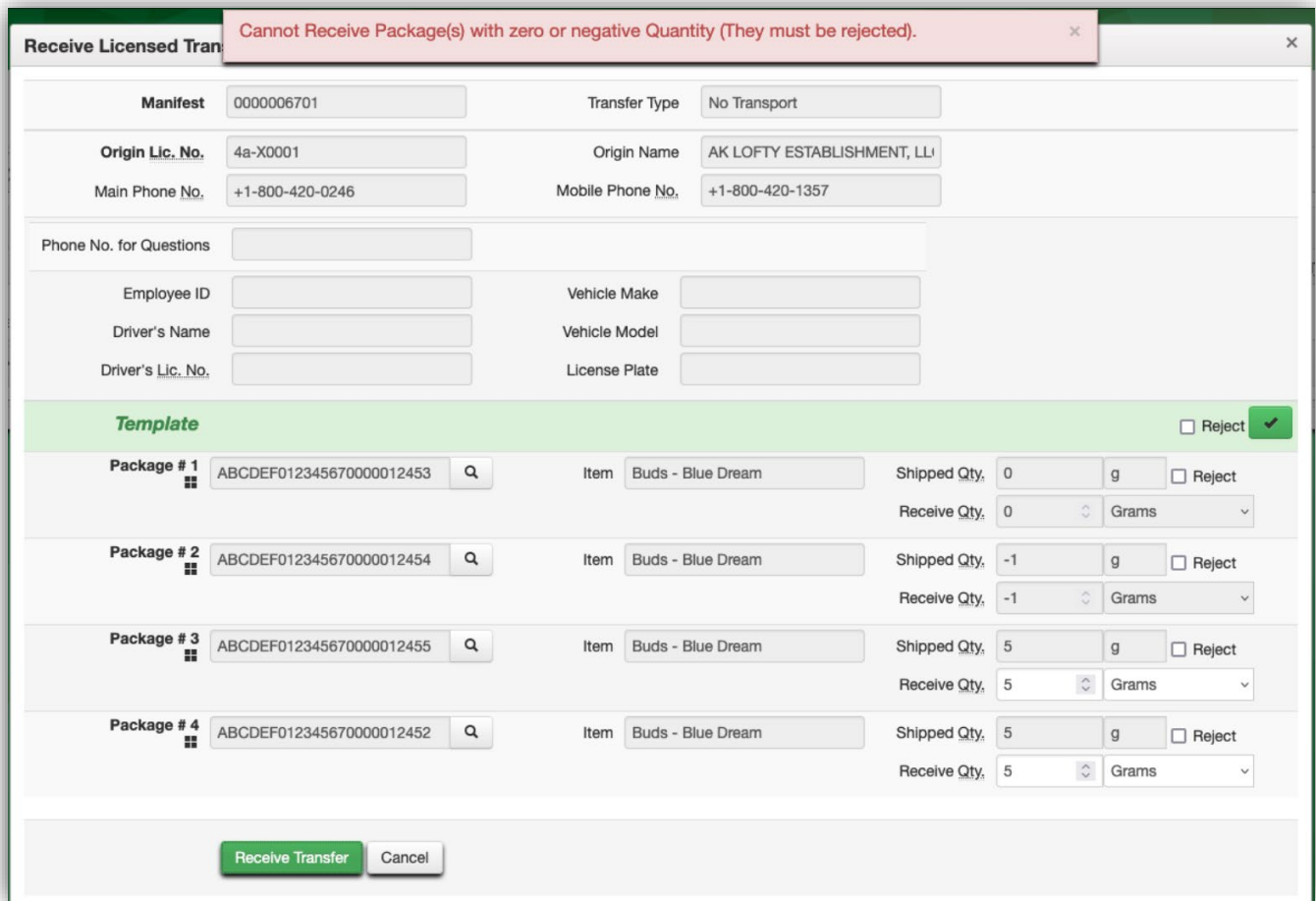


**Figure 11: Address Book action window**



## 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.**



**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* – 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.