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| Bulletin Number: ME_IB_049 | Distribution Date: 10/24/2024 | Effective Date: 11/06/2024 |
| Contact Point: Metrc Support | Subject: Recording Sales Deliveries for Nurseries, Cultivators, and Product Manufacturers | |
| Reason: Providing guidance on Sales Deliveries functionality for Nurseries, tier 1 and tier 2 Cultivators, and Product Manufacturers. | | |

Greetings,

Metrc is pleased to provide information regarding the processes of recording Sales Deliveries for Nurseries, tier 1 and tier 2 Cultivators, and Product Manufacturers.

Please read on for important information and key differences in functionality.

Sales Deliveries

Effective 11/06/2024, Sales Delivery functionality will be available for Nurseries, tier 1 and tier 2 Cultivators, and Product Manufacturers.

Employees who require access to sales deliveries to report relevant sales activity must be granted appropriate permission to complete the related functions. These permissions can only be granted by a Metrc Track and Trace Admin or an employee with proper authorization, which requires the 'Manage' permission setting in the Metrc system.

1. To grant the Sales Delivery permission, go to the Admin area on the navigational toolbar and select the Employees option from the drop-down menu – **see Figure 1.**

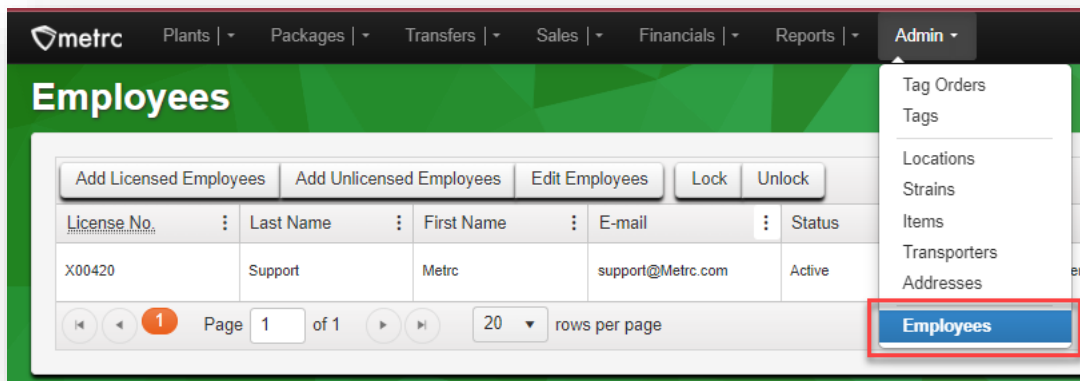


Figure 1: Employees grid in the Admin area dropdown

2. From the Employees grid, highlight the Employee that needs to be granted permission and click on the Edit Employees button to access the Edit Employees action window – **see Figure 2 below.**

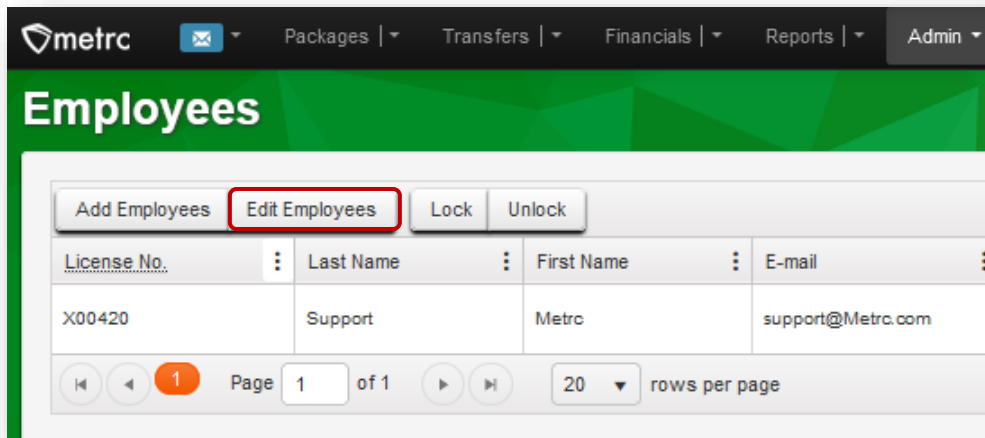


Figure 2: Edit Employees button in the Employees grid

3. Locate the Sales Menu section in the Edit Employees action window. The two permissions available include the ability to View or Manage Sales Deliveries. Check the View or Manage box to the right of the permission that the user is being granted access to for the related function – **see Figure 3 below**.

Sales Delivery – grants access to Sales Deliveries grid and permission to view or manage. Manage permission allows the employee to both view and take actions in the system related to sales deliveries including creating sales delivery manifests.

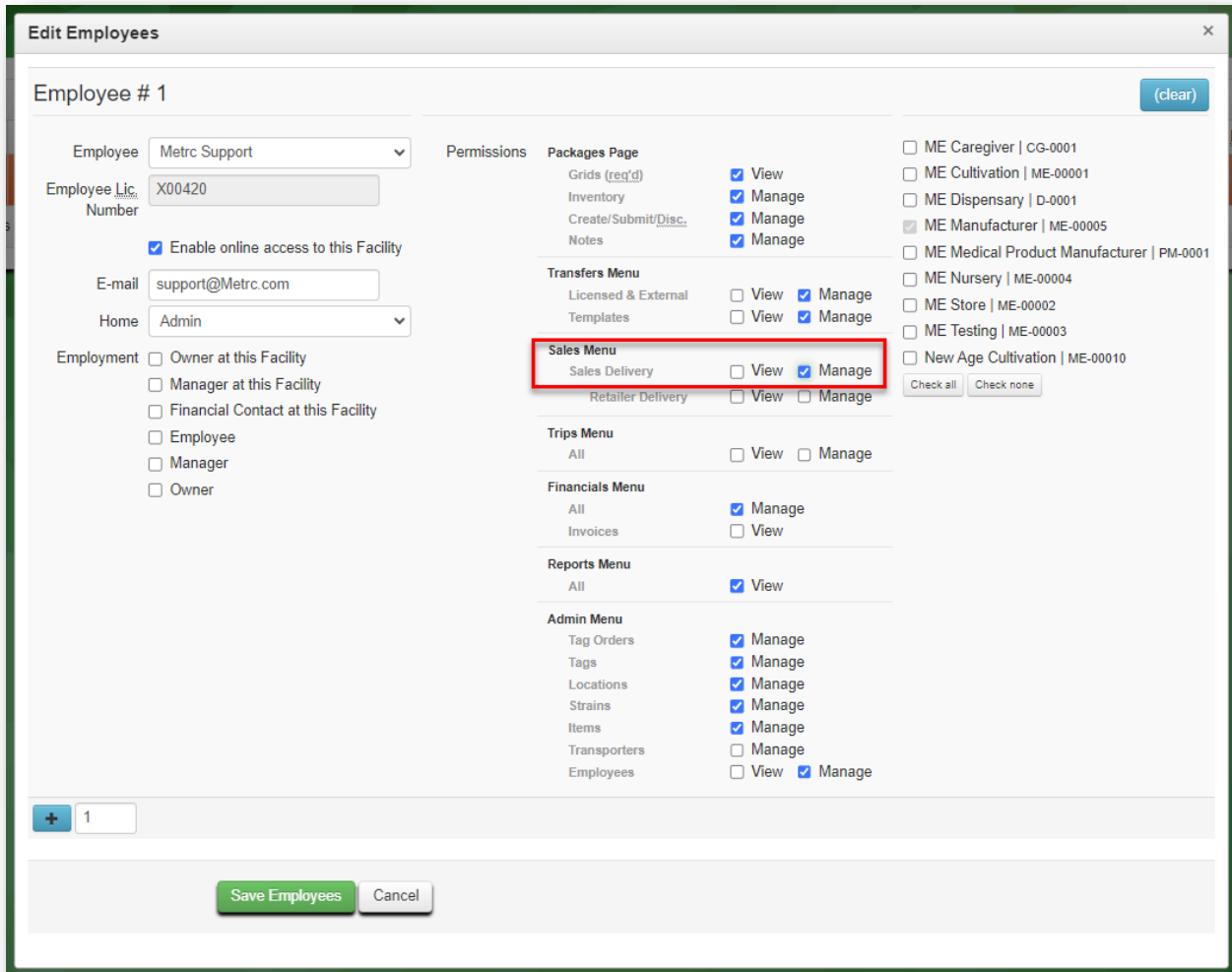


Figure 3: Edit Employee action window with Permissions

After permissions are granted, users will have access to the respective options.

- To access the Sales Deliveries, go to the Sales area on the navigational toolbar and select the Deliveries option from the drop-down menu – see **Figure 4** below.

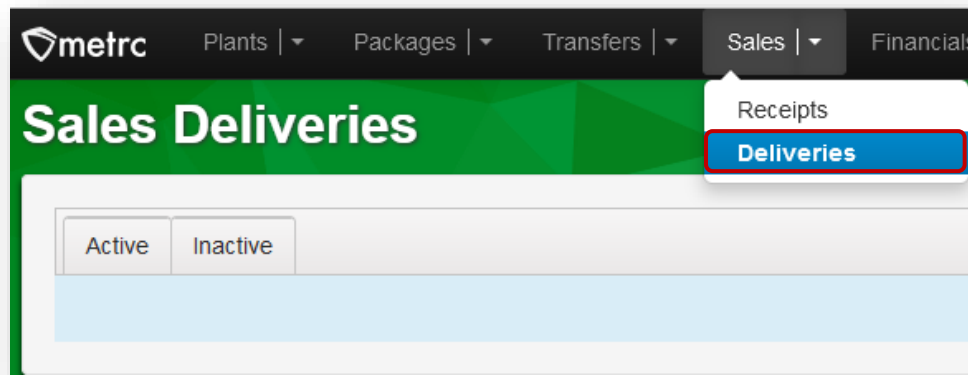


Figure 4: Deliveries option in Sales drilldown

From the Sales Deliveries grid, both Active and Inactive sales deliveries are visible on the appropriate tab that is selected. The Inactive tab will display all completed Sales Deliveries and the Active tab will display all active Sales Deliveries.

Recording Sales Deliveries

A Sales Delivery Manifest is required to be created once a delivery order has been placed by the customer. These Sales Delivery manifests provide the required tracking when products are being transported from a licensed premises to a consumer via delivery. When recording the information within the Sales Delivery Manifest, it is important to ensure the required information is accurately reflected. Please note, while similar to a Transport Manifest, a **Sales Delivery Manifest** is for authorized sales by delivery *to consumers* while a **Transport Manifest** is required for transfers *between licensees*.

1. To begin, go to the Sales Deliveries grid by selecting the Deliveries option under the Sales area drop-down on the navigational toolbar – see **Figure 5**.

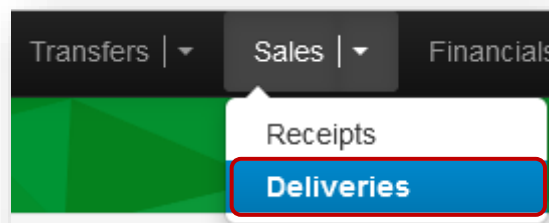


Figure 5: Sales Menu with Deliveries option

- From the Sales Deliveries grid, select the Record Deliveries button to open the Record Deliveries action window – **see Figure 6**.

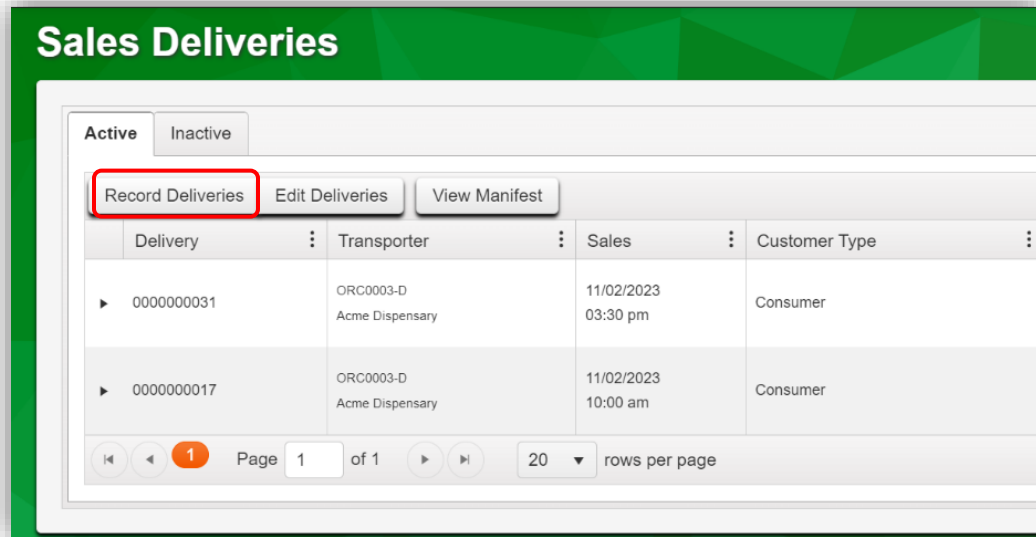


Figure 6: Record Deliveries button

- In the Record Deliveries action window, enter the details of the Sales Delivery, including driver and vehicle information. After all the required information is entered, select the green Record Sales Deliveries button to complete the Sales Delivery creation process – **see Figure 7 below**.

Record Deliveries

Sales Delivery # 1

| | | | |
|--------------------------------|--|----------------------|------------------------------------|
| Sale Date/Time | 05 / 01 / 2024 today 08 : 00 AM | Consumer Id | <input type="text"/> |
| | | Name | <input type="text"/> |
| Est. Departure | 05 / 08 / 2024 today 02 : 30 PM | Est. Arrival | 05 / 08 / 2024 today 02 : 34 PM |
| Planned Route | Route from license business to destination | | |
| | Address | 123 Main St | |
| | Address Cont. | <input type="text"/> | |
| | City | Augusta | |
| | County | <input type="text"/> | |
| | State + Zip | ME 01234 | |
| Driver 1 | Joe Brown | Vehicle 1 | LVWeed |
| Employee ID | 8675309 | Vehicle Make | Chevy |
| Driver's Name | Joe Brown | Vehicle Model | Kush Van |
| Driver's Lic. No. | 1253 | License Plate | LVWeed |
| Phone No. for Questions | ex. +1-123-456-7890 | | |
| Package # 1 | 1A4FF010000025B000000003 | Quantity | 3.5 Grams |
| Available | 595 g | Total Price | \$ 75.00 |
| Transaction Details | | | |
| (package) | | | |
| + 1 | | | |
| Record Sales Deliveries Cancel | | | |

Figure 7: Record Deliveries action window to record Sales Delivery details

Marking Sales Deliveries as Complete

Once the sale has been physically delivered, the associated licensee will then need to mark the sales delivery as complete. To do this, navigate to the Sales Deliveries grid and select the Complete button for the Sales Delivery – see **Figure 8**.

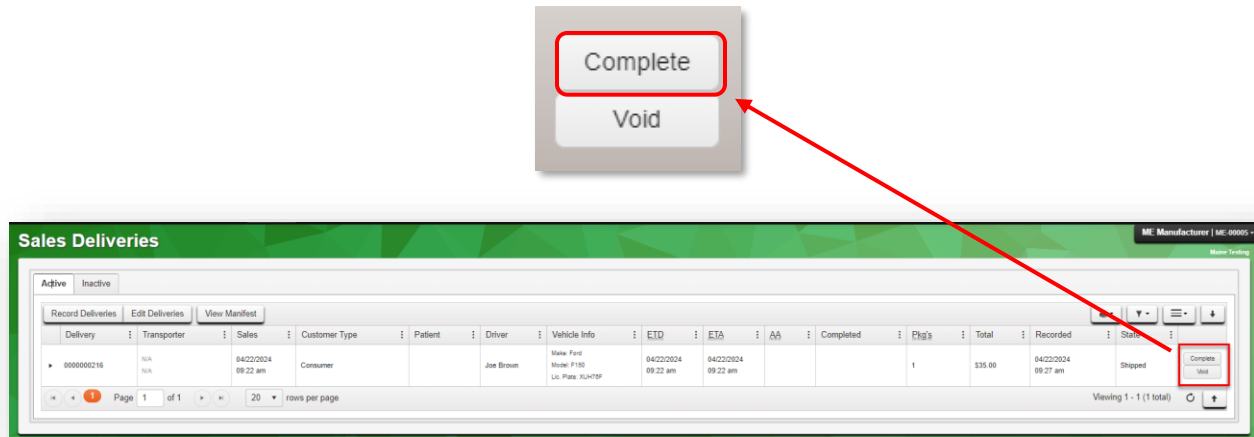


Figure 8: Complete Sales Delivery

This will open the Complete Delivery action window, and the sales delivery can be finalized by selecting the green Complete Sales Delivery button - see **Figure 9**.

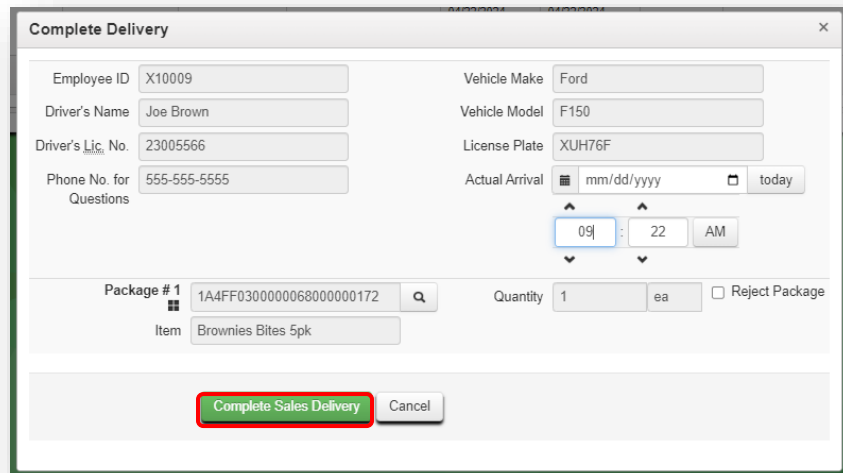


Figure 9: Complete Delivery action window

If the Sales Delivery was not completed, take the following steps:

- Use the Reject Package checkbox to record the necessary information
- Verify the amount of product being returned using the Verification field
- Select a reason from the Return Reason dropdown
- Add additional details in the Required Note field.

When all the information is entered, select the green Complete Sales Delivery button - see **Figure 10**.

Figure 10: Complete Delivery action window with Reject Package

After completing the Sales Delivery, the completed delivery will be finalized and automatically moved to the Inactive tab in the Sales Deliveries grid – see **Figure 11**.

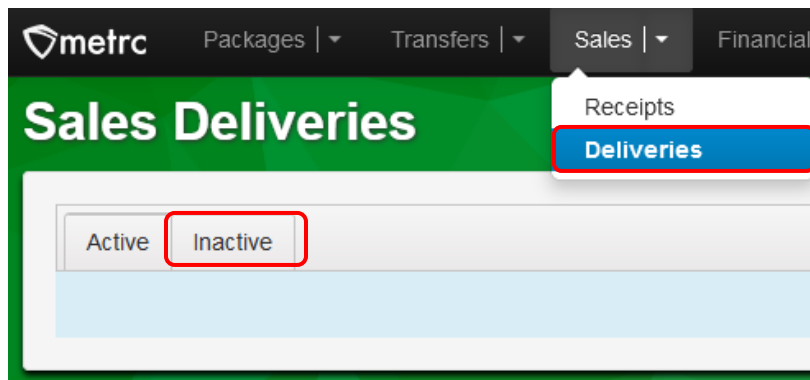


Figure 11: Inactive tab with completed Sales Deliveries

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, 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.

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 drop-down Support menu in 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.