Bulletin Number: MT_IB_53	Distribution Date: 10/30/2024	Effective Date: Ongoing
Contact Point: Metrc Support	**Subject:** Product labeling functionality in Metrc	
Reason: A reminder that new, optional product labeling functionality is available in the Metrc system.		

Greetings,

We are pleased to announce that product labeling functionality through Metrc Retail ID ("Retail ID") is currently available in the Metrc system. This new product labeling QR code solution – **which is optional to use –** creates a single source for compliance information as item-level unique identification data is pulled directly from the Metrc system.

What is Metrc Retail ID?

Metrc Retail ID leverages QR code technology to provide unique product labeling for individual items. It is designed to enhance supply chain transparency, optimize operational efficiency, and improve compliance outcomes.

By enabling precise tracking and easy access to product information, Retail ID aims to protect public health, ensure products are legal and safe, and boost consumer confidence through increased transparency. Retail ID offers benefits across the supply chain:

1. **Brands & Manufacturers:** Generate QR codes for inventory that has passed testing to streamline product identification and labeling, ensuring each item is easily trackable throughout its lifecycle.
2. **Distributors & Transporters:** Move product easily through the supply chain without additional scanning requirements to reduce handling time and potential errors while enhancing efficiency.
3. **Retailers & Dispensaries**: Pending POS providers' integration capabilities, quickly scan a Metrc Package UID to complete transfers received and during sales to speed up checkout processes and improve accuracy in inventory and sales records.
4. **Consumers**: In a single scan, consumers gain access to detailed product information, including COAs, product origins, and more.

Please read on for important information regarding specific Metrc system functionality related to Retail ID.
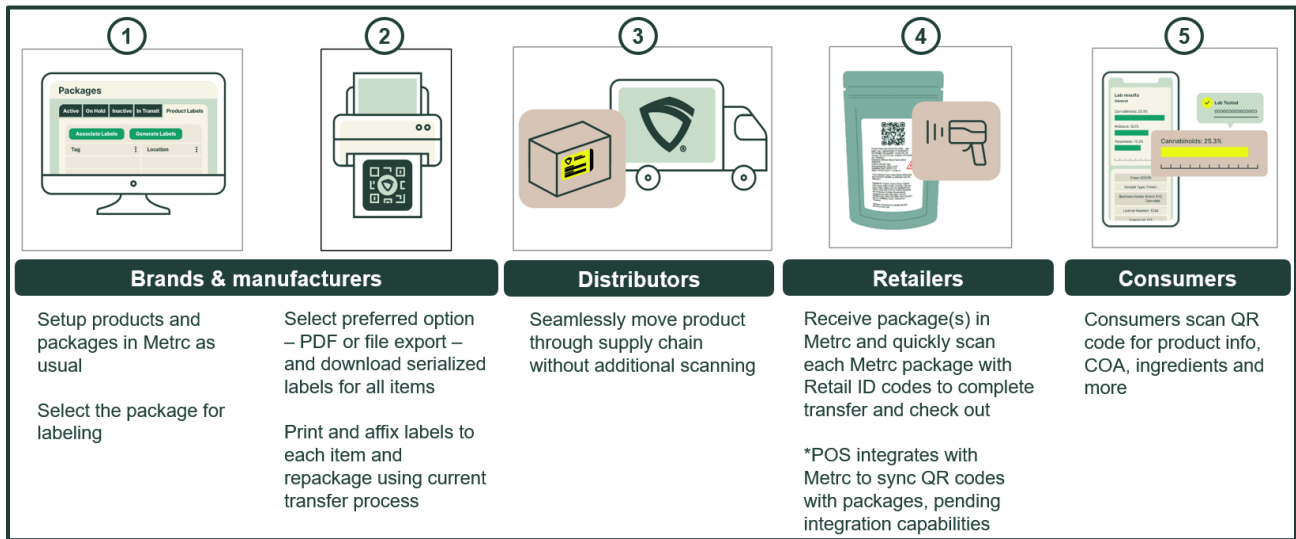
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Important notes:

- This new feature is optional for licensed businesses in Montana to use.
- Integration with third-party ERP and POS systems is available to automatically capture data updates with each product scan, ensuring data consistency across systems, reducing administrative burdens, and enhancing decision-making with up-to-date information.
- In accordance with the Montana CCD, licenses that intend to use Metrc Retail ID to satisfy the QR Code requirement outlined in **42.39.314 GENERAL LABELING REQUIREMENTS** must notify their Testing Facility and request that the Certificate of Analysis is uploaded into Metrc. COA upload functionality is now available as an optional feature in Montana. Additional information can be found in the Metrc bulletin **MT_IB_0052**.

Metrc Retail ID overview

How it works:

Below is a high-level overview of the general workflow for Metrc Retail ID in-system functionality. The following pages include more detailed information on system best practices to get started using this optional solution.

Brands & manufacturers		Distributors	Retailers	Consumers
Setup products and packages in Metrc as usual Select the package for labeling	Select preferred option – PDF or file export – and download serialized labels for all items Print and affix labels to each item and repackage using current transfer process	Seamlessly move product through supply chain without additional scanning	Receive package(s) in Metrc and quickly scan each Metrc package with Retail ID codes to complete transfer and check out *POS integrates with Metrc to sync QR codes with packages, pending integration capabilities	Consumers scan QR code for product info, COA, ingredients and more

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The following table outlines the key features, limitations, and capabilities of Retail ID.

Access location	Metrc system
Unique, serialized QR codes	Prints in PDF format, fixed size 0.75" x 0.75"
Label customization	Label sizes and additional data are unable to be changed or added
Data export	Ability to generate a CSV file of the QR URL
ERP and POS integration	Full integration is available to allow seamless data flow and synchronization. Retail ID integration is available to Metrc Connect customers only.

If you opt to leverage Retail ID functionality, all required labeling information set by your state's rules and regulations needs to be included per your current processes. The information that will be available via the QR code is based on the required test types for Montana. In addition to required test types, the following standardized panel information listed in the table below is also available to be reported into Metrc. If any of these tests are reported by your third-party testing facility, they too would be available to reference via the QR code.

Note: Retail ID also supports additional test types if not already required that can be pulled in based on the data available when the Retail ID code is generated.

Cannabinoid Profile	Terpenes
- CBD - CBDA - Delta-9 THC - THCA - Total THC (%, mg/serving, and mg/package) - Total CBD (%, mg/serving, and mg/package) - Total Cannabinoids	- Alpha-Bisabolol (%) - Alpha-Humulene (%) - Alpha-Myrcene (%) - Alpha-Pinene (%) - Beta-Caryophyllene (%) - Beta-Humulene (%) - Beta-Myrcene (%) - Beta-Pinene (%) - Caryophyllene Oxide (%) - Eucalyptol (%) - Limonene (%) - Linalool (%) - Nerolidol (%) - Phytol (%) - Total Terpenes (%)

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Getting started with Metrc Retail ID

The proper product labeling employee permissions must be granted by an Admin to be able to access this functionality.

To enable permissions, access the "Admin" area on the navigational toolbar and select the "Employees" option from the dropdown – **see Figure 1.**
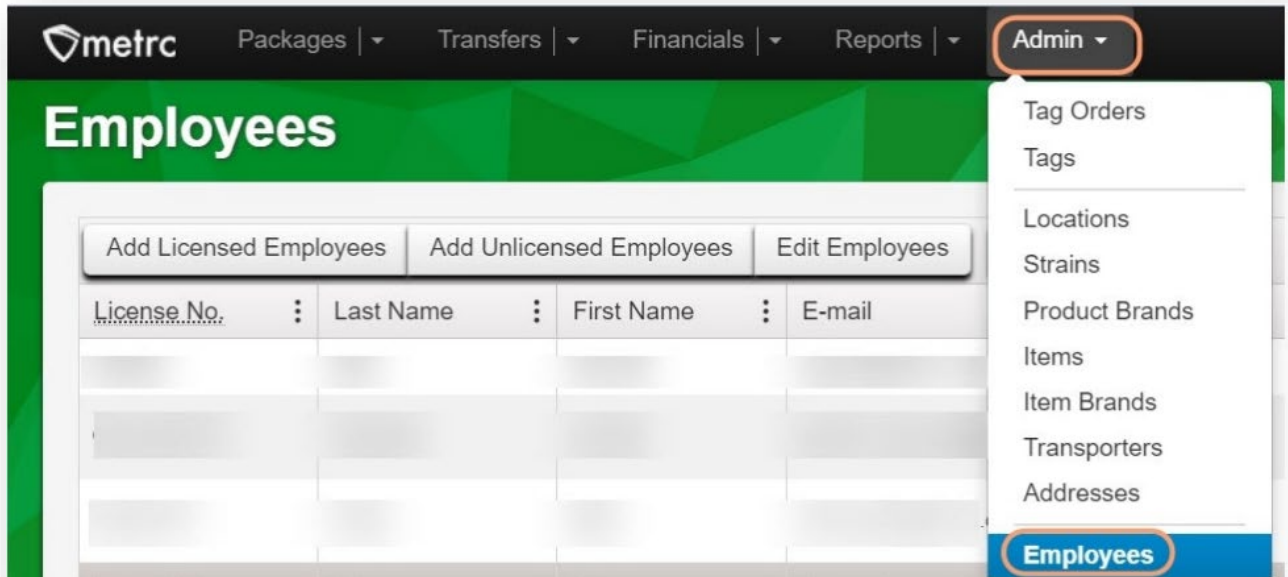

Figure 1: Employees in Admin dropdown

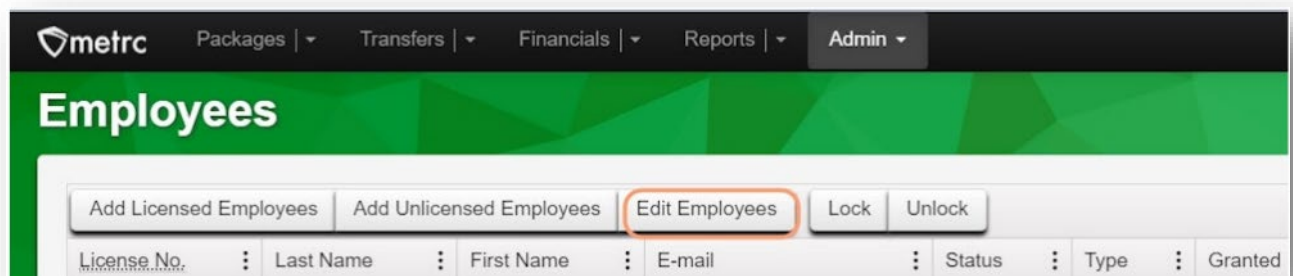From the Employees grid, select the employee that needs to be edited and click on the "Edit Employees" button – **see Figure 2.**

Figure 2: Edit Employees button

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From the Edit Employees action window, click the permission for "Product Labels." When editing an employee's permission, an employee's email can be updated, the welcome email can be resent, and any assigned permissions can be updated or added. Permission for Product Labels should be added. The following options are available to select regarding permission for Product Labels:

- **View:** Allows users to view the Product Labels tab that includes the packages within it and the historical information but not make changes.
- **Manage:** Grants full access to download, associate, discontinue, and view product labels.

Additionally, the same permissions can be applied to an employee's information across multiple licenses by checking the corresponding checkbox for each license that the permission needs to be enabled for – **see Figure 3.**
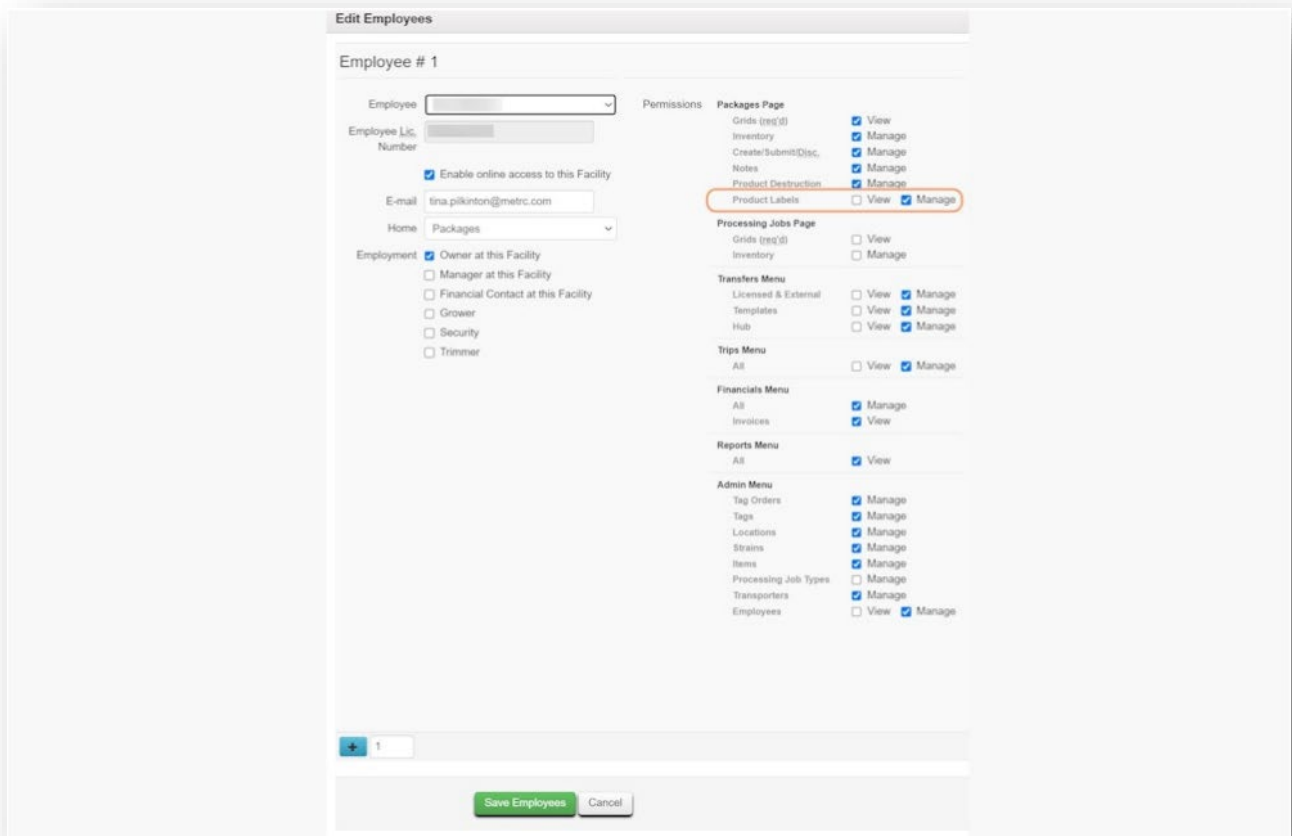

Figure 3: Manage Product Labels Employee Permissions

Downloading Product Labels

With the appropriate employee permissions set, take the following steps to generate and download product labels within the Metrc system:

Go to the Packages area on the navigational toolbar. From the Packages grid, select the "Product Labels" tab – **see Figure 4.**
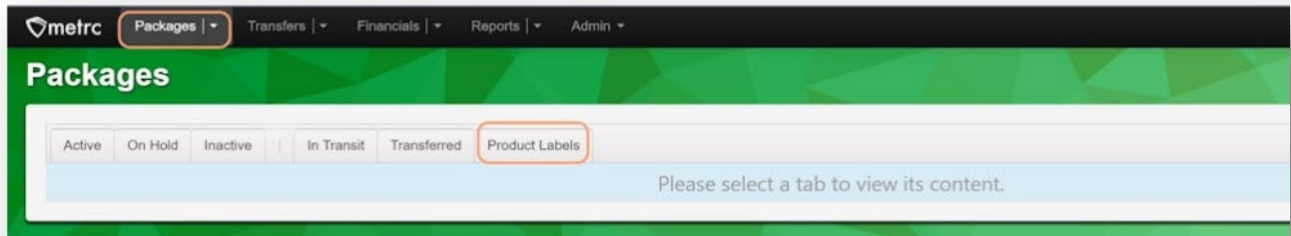

Figure 4: Product Labels tab

From the Product Labels grid, select the package with a status of Test Passed or Retest Passed that is ready for labeling, then click the "Download Labels" button. If a package is not selected, it can be selected via the magnifying glass icon in the Download Labels action window – **see Figure 5.**
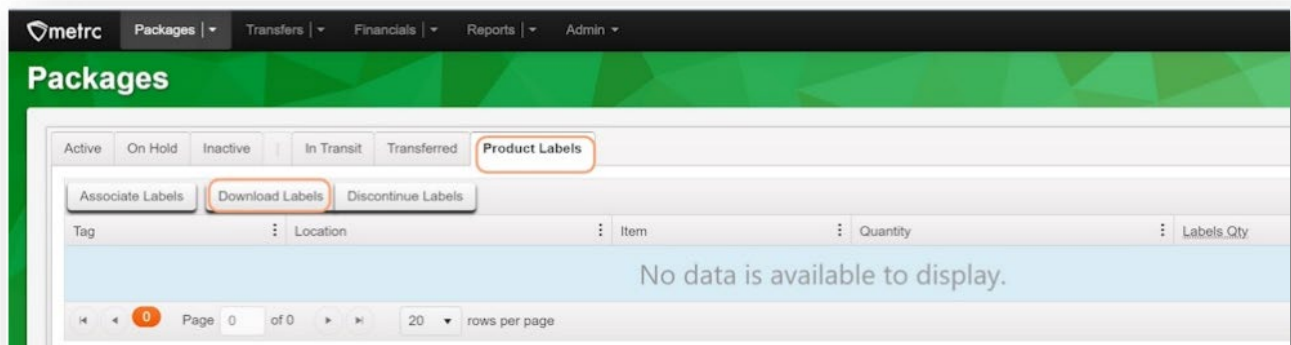

Figure 5: Download Labels

In the Download Labels action window, enter the quantity of labels needed for the package. Retail ID supports labeling of both count-based and weight-based items. It is recommended to add 5% of the actual quantity of labels needed when downloading labels to account for any that may get damaged or lost during the labeling process. Select the file format by choosing either Download Labels PDF or CSV.

- The QR size in the PDF is 0.75" x 0.75".
- The PDF is formatted for printing in a roll format.

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Then open the downloaded PDF or CSV to view your serialized labels – **see Figure 6.**

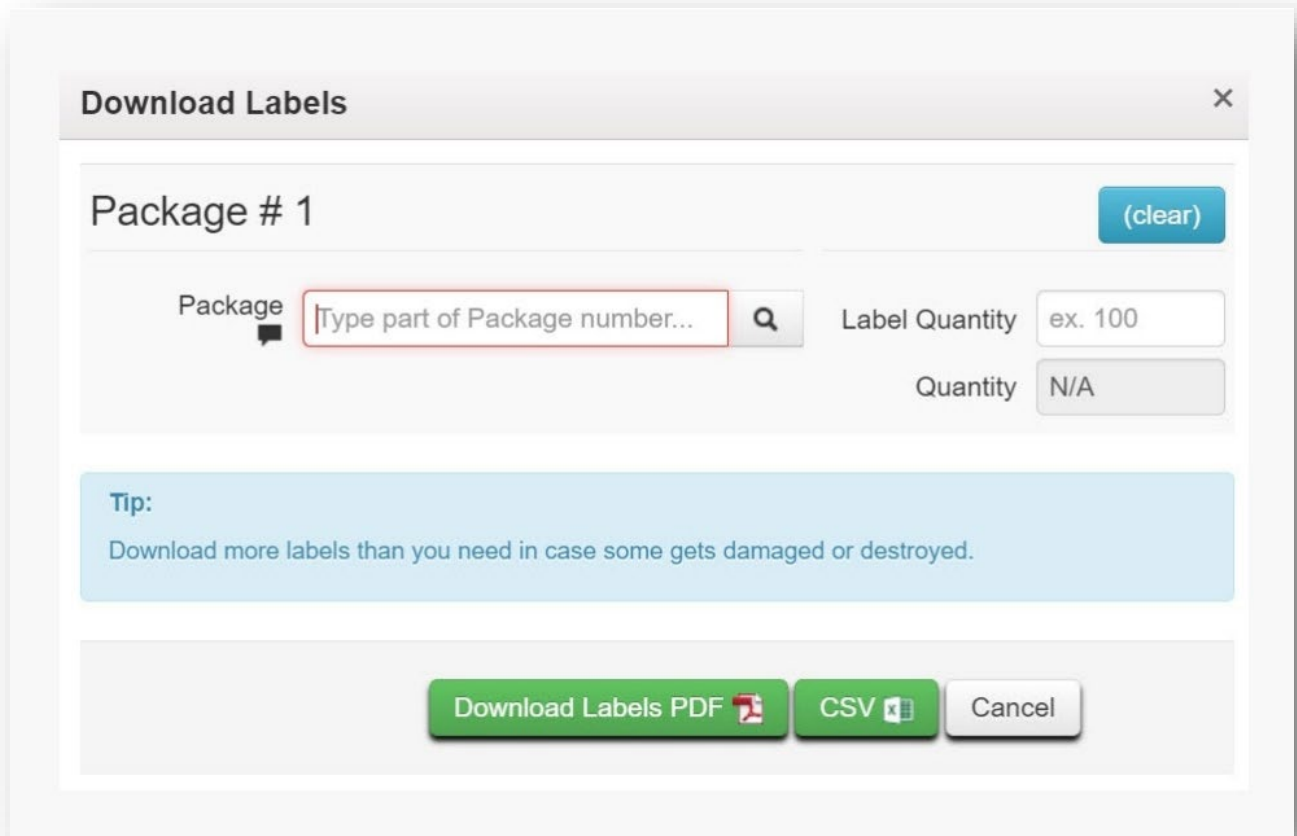**Note:** Consider downloading more labels than you currently need to account for any replacements.

Figure 6. Download Labels action window

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How to Associate Labels

When repackaging from a source package that has Retail ID codes generated from it, licensees have the option to associate which specific units are assigned to the derived Metrc Package "Child Tag". Associating to a child tag reduces the chances of inventory being assigned to the incorrect Metrc package tag. If no association is made, Metrc will track all available Retail ID codes with the number of Metrc package tags that were derived from the original source of generation.

To associate labels, go to the Packages grid and select the "Product Labels" tab. From the Product labels grid, select a package that you want to associate labels with. Then click the "Associated Labels" button – **see Figure 7.**

Figure 7: Associate Labels button

Please note: Associating labels is not required but encouraged, since it enhances traceability of individual units and ensures that each final product is uniquely assigned to a single Metrc package tag, thereby upholding product safety and best practice inventory standards.

From the Associate Labels action window, the package tag number will be auto-populated. In the QR Scan input field, use a scanner to scan all QR codes on your items until all are completely scanned. The Quantity fields will auto-populate with each scan. Once all QR codes have been scanned, click the "Associate Labels" button to complete the Associating Labels process – **see Figure 8 below.**
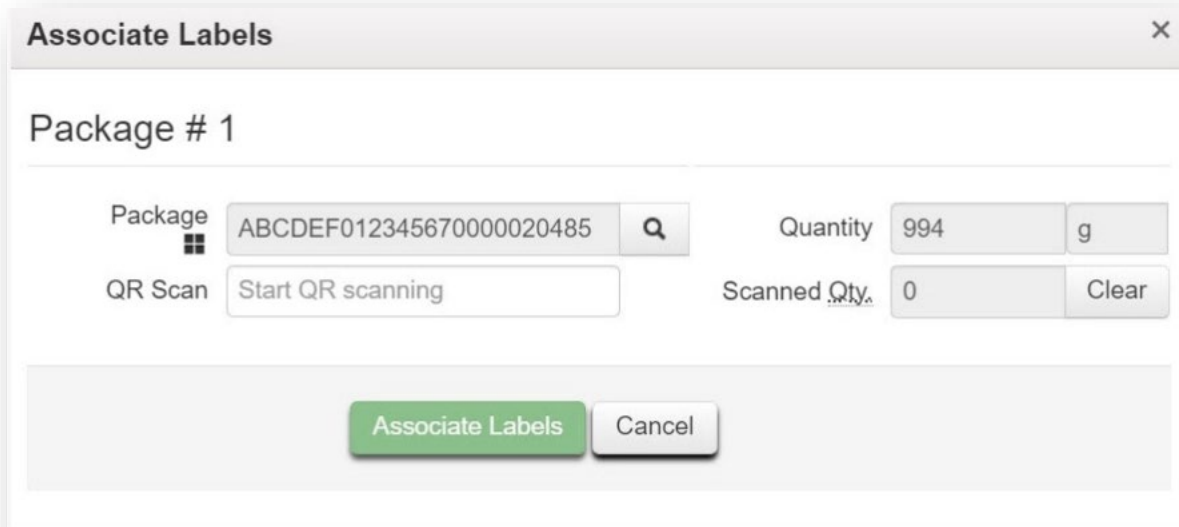
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Figure 8: Associate Labels action window

How to Discontinue Labels

Discontinuing product labels will remove the link between packages and previously downloaded product labels but will not discontinue the package itself. Once package labels are discontinued, they cannot be re-downloaded in the current version.

To discontinue product labels, go to the Packages grid and select the "Product Labels" tab. Then select a Package for which you want to discontinue product labels and click the "Discontinue Labels" button – **see Figure 9.**
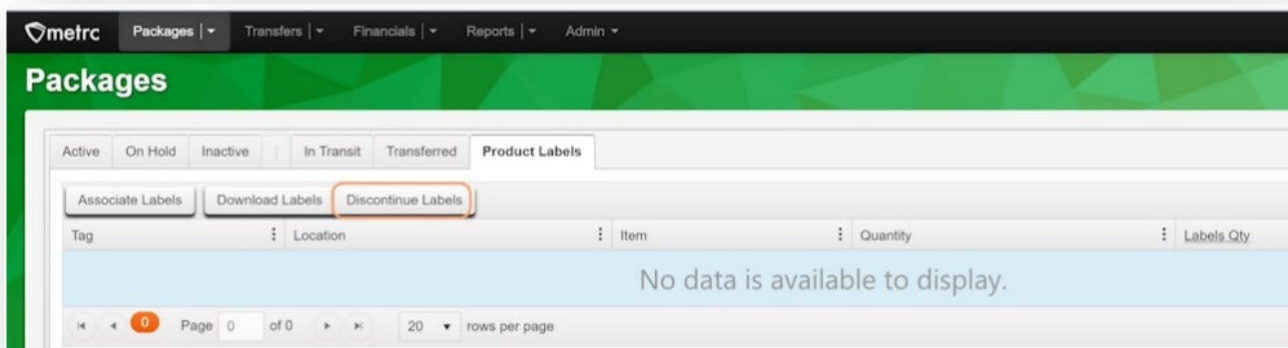

Figure 9: Discontinue Labels button

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Consumer experience – Scanning a Retail ID QR code

Once a consumer purchases a product labeled with a Retail ID QR code from a retailer or dispensary, they can scan the QR code with their mobile phone camera and gain access to detailed product information, including COA and testing information (reference page 2 of this bulletin for information).

Since the COA document is linked directly through the QR code based on data housed in the Metrc system, this allows real-time access to item-level product data in a single scan, which helps build consumer confidence with validation of lab testing – **see Figure 10.**
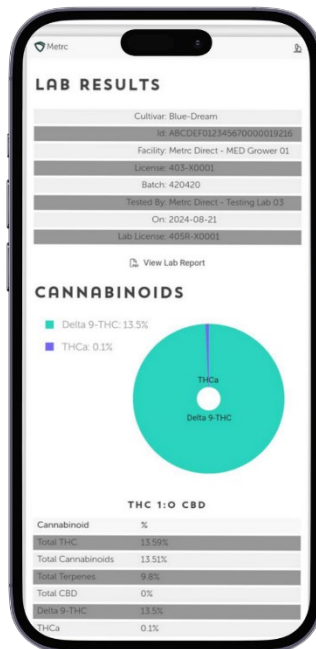

Figure 10: Consumer view of Retail ID QR code scan

Reminder:

In accordance with the Montana CCD, licenses that intend to use Metrc Retail ID to satisfy the QR Code requirement outlined in **42.39.314 GENERAL LABELING REQUIREMENTS** must notify their Testing Facility and request that the Certificate of Analysis is uploaded into Metrc. COA upload functionality is now available as an optional feature in Montana. Additional information can be found in the Metrc bulletin **MT_IB_0052**.

Thank you for your continued partnership. We look forward to supporting your success with Retail ID.

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Metrc resources

To ensure users who opt to leverage this new feature and related functionality can start using it quickly, the following resources are available:

Metrc Expert: Access help directly within Metrc via the Metrc Expert widget located in the lower-right corner of your screen with the question mark icon.

Metrc Learn: Our redesigned learning management system now includes a new course titled Metrc Retail ID Walkthrough to learn more about this functionality. To access this training, go to Metrc Learn.

Please note: The proper product labeling employee permissions must be granted by an Admin to be able to access this functionality.

If you still have questions, please reach out to Metrc Support to create a Metrc Retail ID case in the Support portal.

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