

Bulletin Number: CO_IB_12.11.2024_New Features: Max Package, Autofill UoM, Invoice field	Distribution Date: 12/11/2024	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: New Features and Updates Available in Metrc Support	
Reason: To share the latest regarding new Metrc features and enhancements now available		

Greetings,

Metrc is excited to share the latest regarding new features now available in Metrc including:

- Max Quantity Button & Autofill Unit of Measure
- Optional Invoice Field

Please read on for detailed information regarding this new functionality.

Max Quantity and Autofill Unit of Measure

The unit of measure and quantity fields will auto-populate according to the source package selected by the license. By selecting the Max button, the system will apply the maximum quantity to the chosen package, applying the related Unit of Measure.

This will apply to the following areas of Metric: New Packages, Sales, Sales Deliveries.

When creating a new package, select a package and then click the “New Packages” button on the Packages grid. From the New Packages action window, the “Max” button appears to the right of the Unit of Measure of the Source Package.

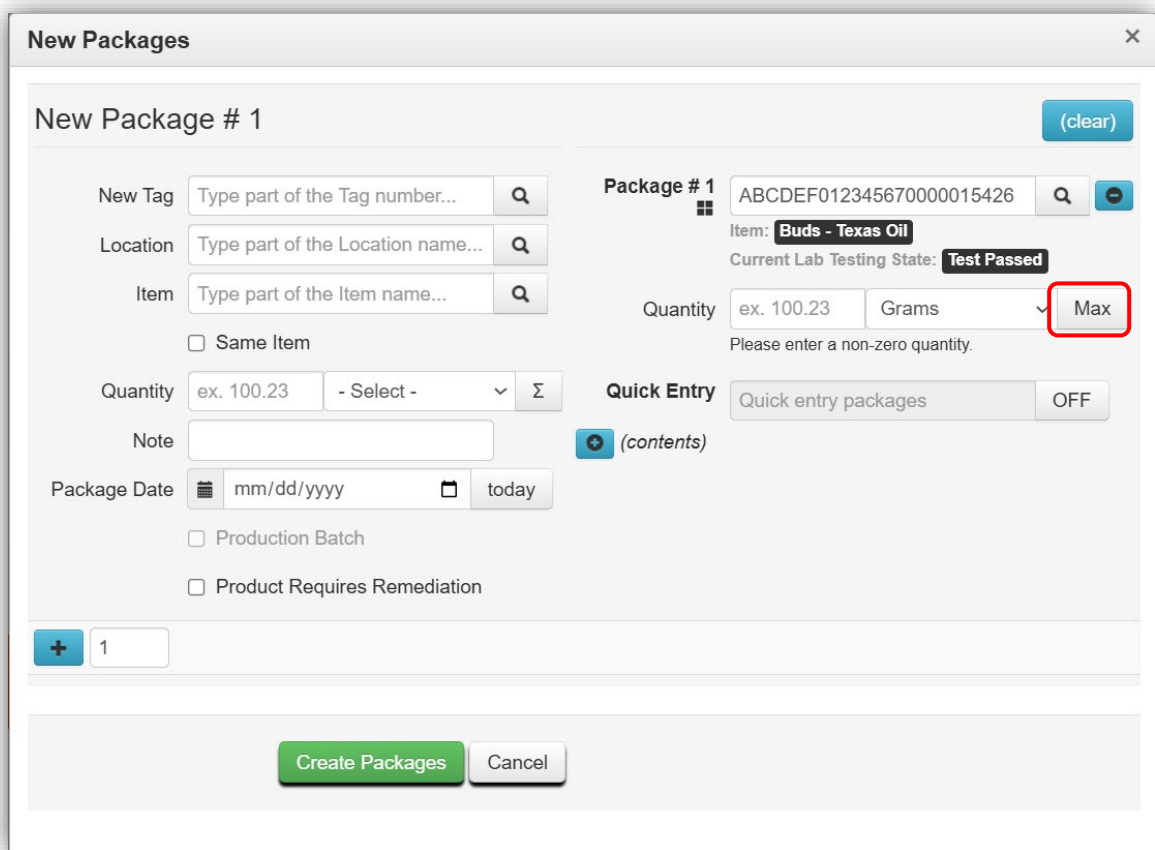


Figure 1: Max Quantity Button in the New Packages Action Window

Click the “Max” button and this will auto-populate the maximum available quantity and the related Unit of Measure in the source package quantity field as well as the New Package being created – see Figure 2 below.

Figure 2: New Packages Action Window Max Quantity

This feature is also available in the Mini-Templates when creating multiple packages simultaneously - see Figure 3 below.

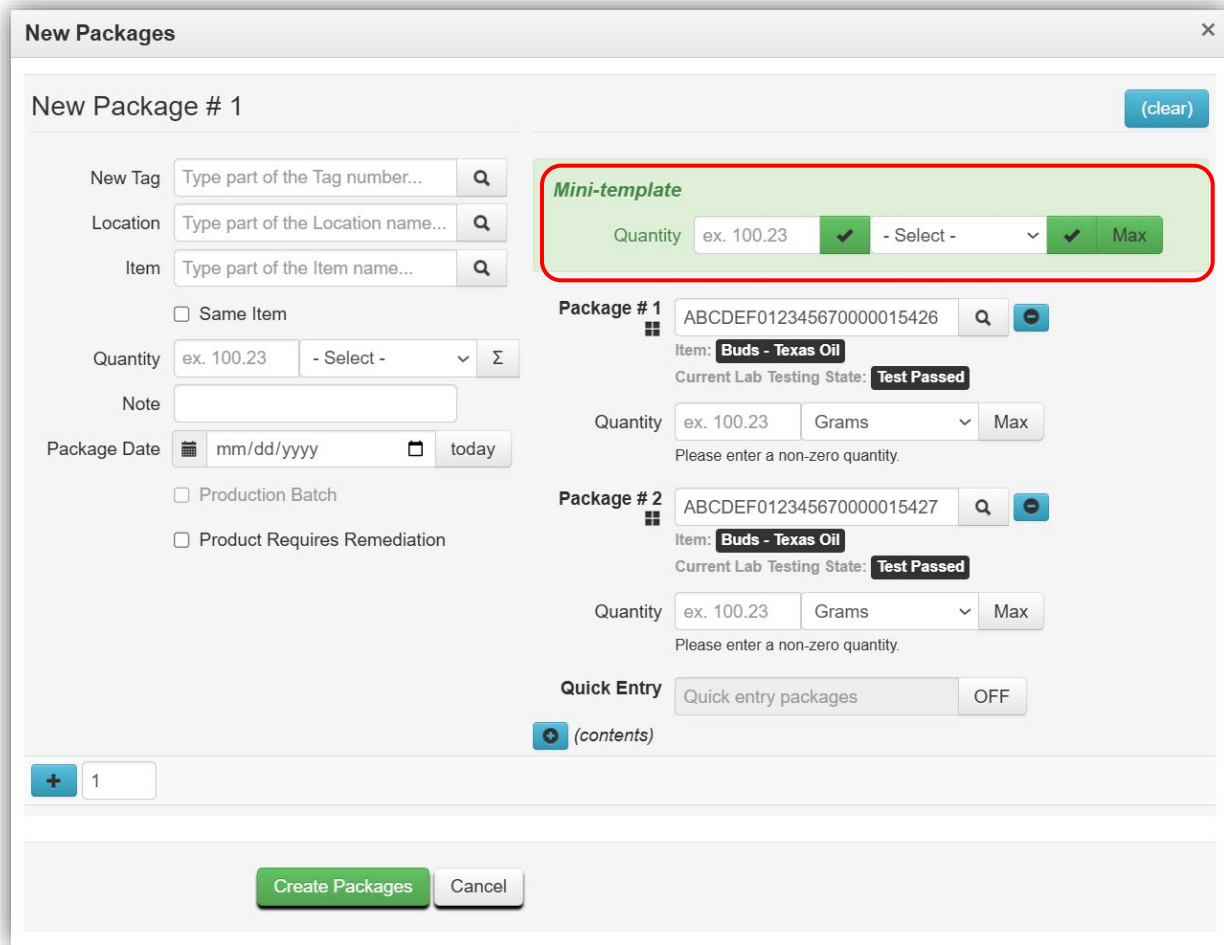


Figure 3: New Packages Window Mini-template

By clicking the “Max” button in the Mini template, the maximum available quantity for each Package will populate – **see Figure 4 below.**

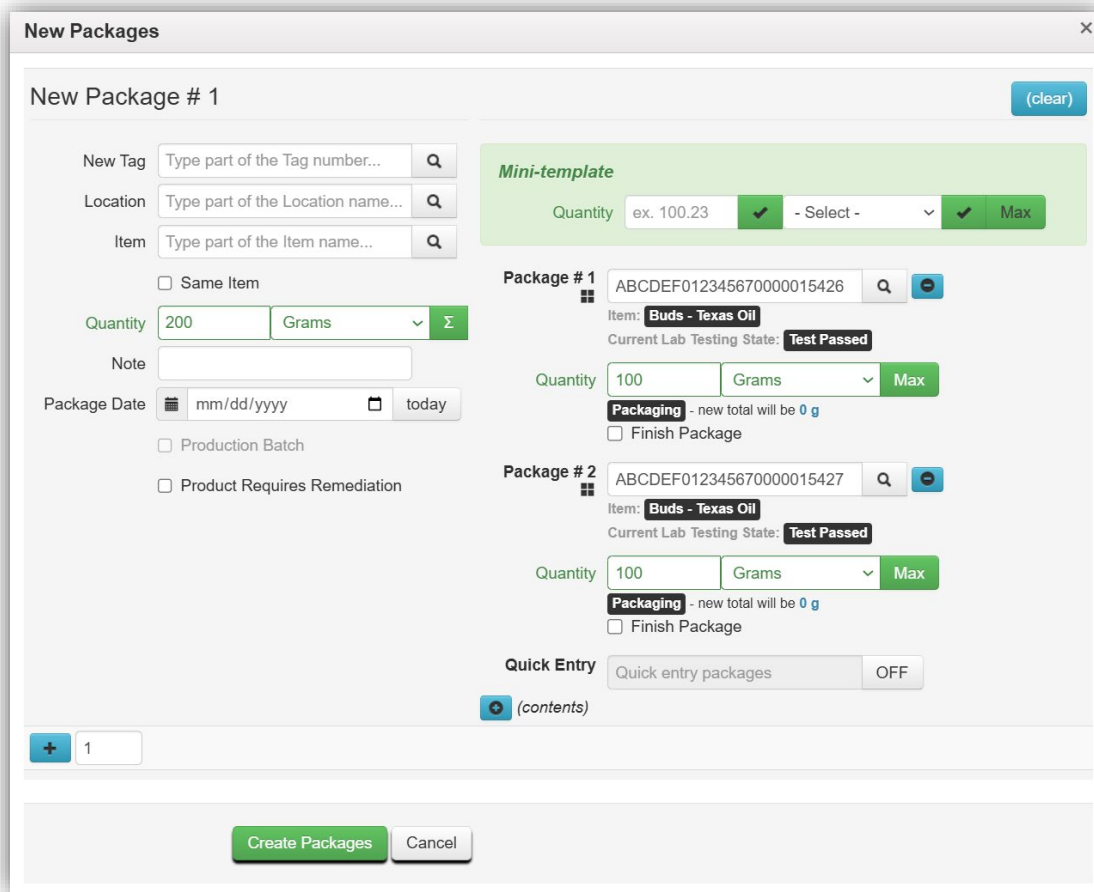


Figure 4: Mini-template with Max quantity populated in New Packages Window

These new features are also available when recording sales deliveries and when recording sales receipts – see **Figure 5** and **Figure 6** below.

Figure 5: Record Sales Deliveries Action Window

The screenshot shows a 'Sales Delivery Action Window' with the following fields and controls:

- Package # 1**: Input field containing 'ABCDEF012345670000013878', a search icon, and a '(clear)' button.
- Available**: Input field containing '5 g'.
- Quantity**: Input field containing '5', a unit dropdown menu set to 'Grams', and a 'Max' button highlighted with a red box.
- Total Price**: Input field containing '\$ ex. 100.23'.
- A blue link labeled 'Transaction Details' is located below the input fields.

Figure 6: Sales Delivery Action Window

We've also added the ability to utilize the Max button when manually recording sales receipts in Metric – see Figure 7.

The screenshot shows a 'Record Receipts' window with the following fields and controls:

- Sales Receipt # 1**: Header with a '(clear)' button.
- Sale Date/Time**: Calendar icon, date '11/22/2024', 'today' button, and a time picker showing '12:00 PM'.
- Customer**: Radio buttons for 'Patient', 'Caregiver', and 'External Patient'.
- Package # 1**: Input field with placeholder 'Type part of Package number...', search icon, and '(clear)' button.
- Quantity**: Input field with 'ex. 100.23', a dropdown menu set to '- Select -', and a 'Max' button highlighted with a red box.
- Available**: Input field with 'N/A'.
- Total Price**: Input field with '\$ ex. 100.23'.
- A blue link labeled 'Transaction Details' is located below the input fields.
- A '(package)' button is located below the 'Transaction Details' link.
- A quantity input field with a '+' button and the value '1' is located below the '(package)' button.
- At the bottom, there are two buttons: 'Record Sales Receipts' (green) and 'Cancel' (grey).

Figure 7: Record Sales Receipts Action Window

Optional Invoice Number on Transfer

On 10/22/2024 Metric was updated to allow licensees to optionally include an *Invoice Number* on transfer manifests.

When creating or editing a transfer, a new optional *Invoice Number* field displays on the action window - see **Figure 8**.

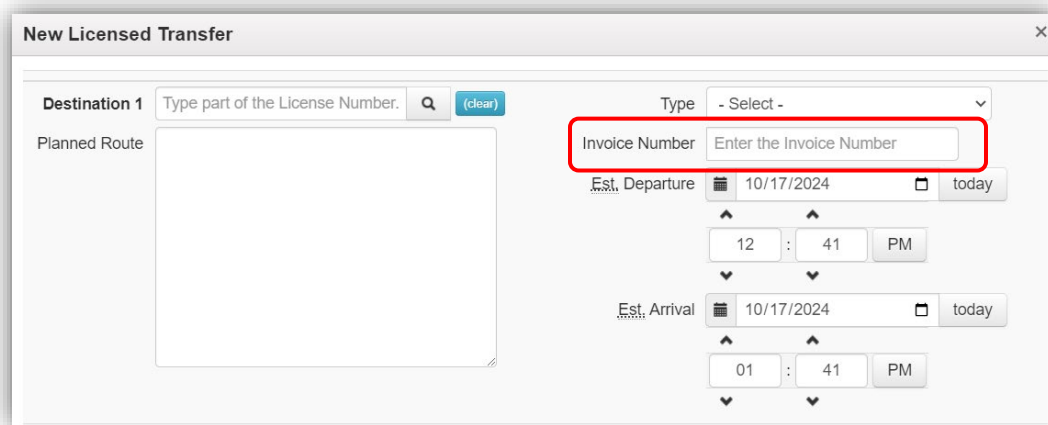


Figure 8: Invoice Number Field in New Licensed Transfer Action Window

An entry in the *Invoice Number* field is **NOT** required, but it can be used as an option by origin licensees who find it helpful to include this information on the transfer/transfer manifest.

The *Invoice Number* field can be viewed by the origin license in the manifest drill-down on the *Outgoing* tab on the *Licensed Transfers* grid – see **Figure 9** below.

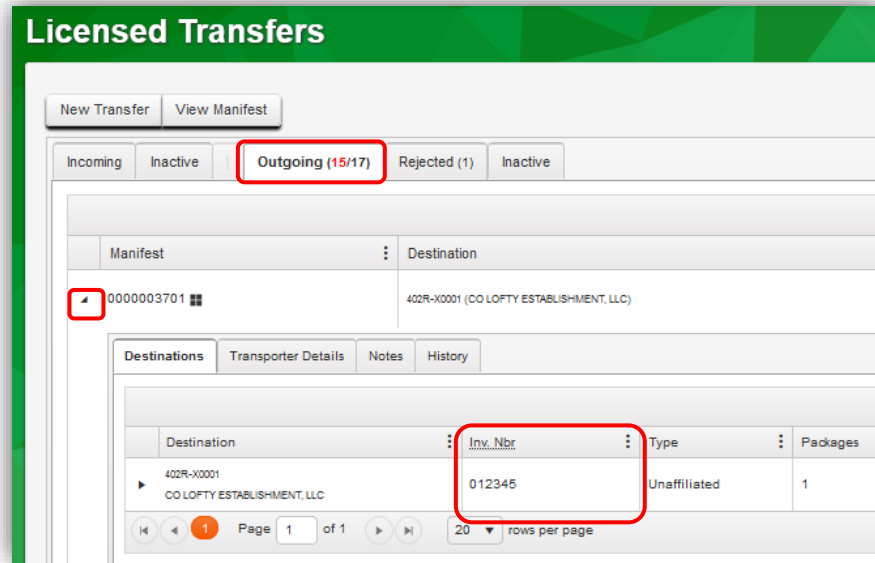


Figure 9: Invoice Number Field on Outgoing Tab Drilldown

The *Invoice Number* field can be viewed by the destination licensee on the *Incoming* tab of the *Licensed Transfers* grid – see Figure 10.

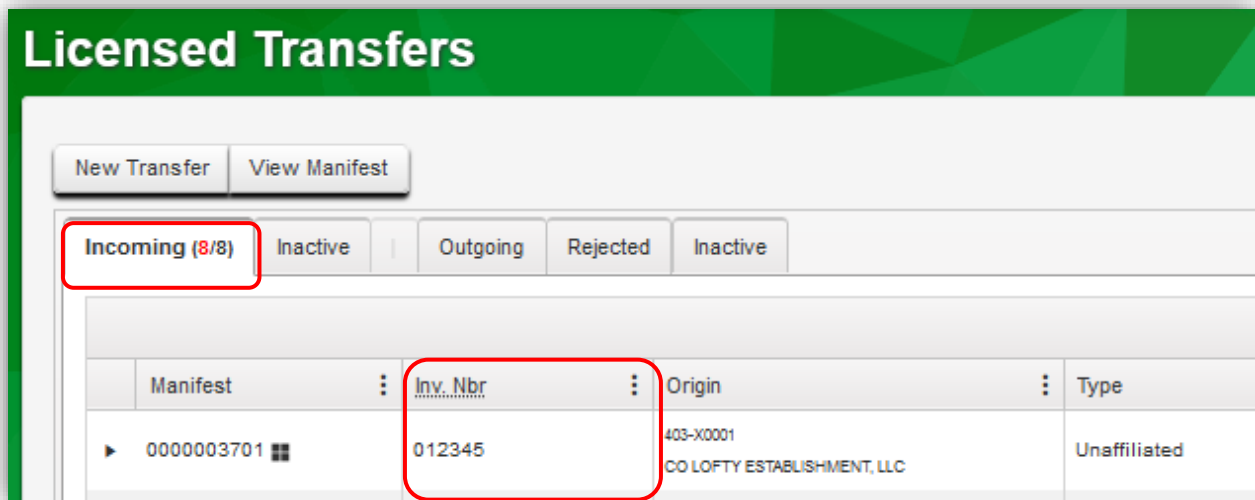


Figure 10: Invoice Number Field on Incoming Tab

Invoice Number on Transfer Manifest

The new *Invoice Number* field also displays when viewing or printing a manifest. It will be populated with a value only if the origin licensee opted to include this information when creating or editing the transfer.

An example of the new *Invoice Number* field on the transfer manifest is shown below - **see Figure 11.**

metrc		METRC®	
MARIJUANA TRANSPORTATION MANIFEST			
All sales transactions are to be completed prior to transportation of any MARIJUANA. The receiving entity may reject product delivered, but amount delivered must be limited to amount agreed upon in prior sales transaction.			
Manifest No.	000003701	Date Created	10/21/2024 6:39 PM
Originating Entity	CO LOFTY ESTABLISHMENT, LLC	For Agency Use Only	
Originating License Number	403-X0001		
Address of Originating Entity			
Phone No. of Originating Entity	+1-800-420-MAIN		
1. Destination	CO LOFTY ESTABLISHMENT, LLC	Destination Phone No.	+1-800-420-MAIN
Invoice Number	012345		
Destination License Number	402R-X0001	Date and Approx. Time of Departure	10/21/2024 6:38 PM

Figure 11: Invoice Number on Transfer Manifest

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 you 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, manuals, and more.

Thank you for your continued partnership.