



# Welcome to Metrc

Transporters webinar – March 28, 2025

# Thank you for joining us today!

*Meet the Metrc team*



**Brent Doherty**  
Regional Director,  
Customer Success



**Chad Heater**  
Manager,  
Customer Success

# Agenda

1 **Metrc implementation**

2 **Metrc onboarding**

3 **Key system features**

4 **Metrc resources**

5 **Q&A**

# Implementation plan



# Metrc implementation overview

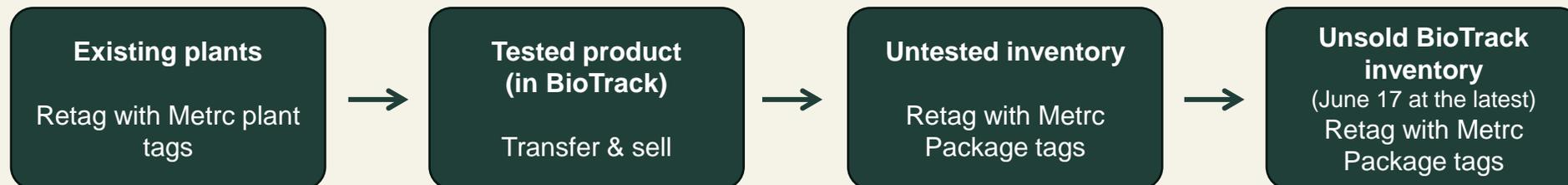
The Metrc migration plan will follow a phased approach to onboard licensees in a timely fashion across the supply chain and to allow dispensaries time to sell through as much BioTrack tracked inventory before converting to Metrc.

**Phase 1:**  
Testing Labs &  
Transporters

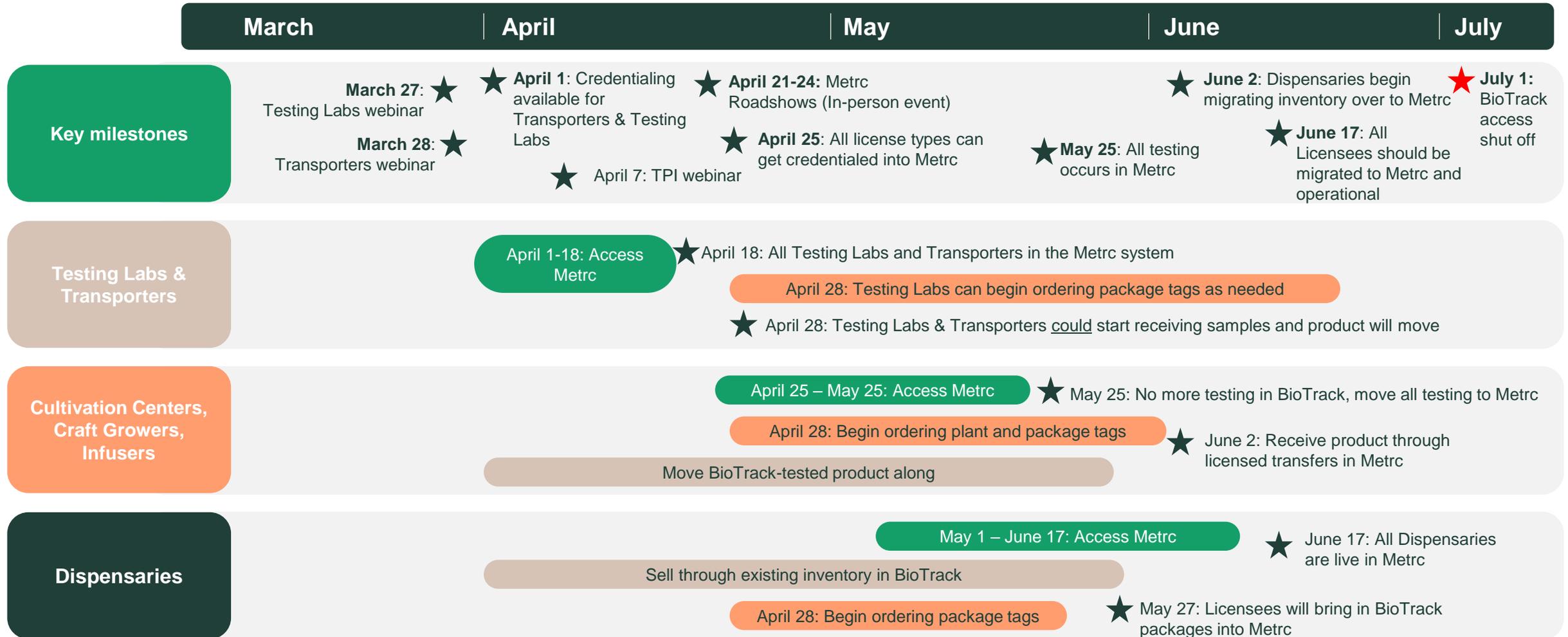
**Phase 2:**  
Cultivation Centers,  
Craft Growers &  
Infusers

**Phase 3:**  
Dispensaries

## Tagging inventory in Metrc



# Implementation timeline



# Transporters

*What to expect as a Transporter in your first few weeks onboarding into Metrc. The following actions and timeline are recommended to ensure a smooth and complete market transition to Metrc by the end June.*

Timing	Actions	Documentation
Date: March 28	<ul style="list-style-type: none"> <li>Welcome to Metrc – Next steps webinar</li> </ul>	
<b>Week 1</b> Dates: April 1-5	<ul style="list-style-type: none"> <li>Register for Metrc Learn and complete New Business Training</li> <li>Get Credentialed in the Metrc system</li> <li>Set up your business and Admin dropdown (Employee permissions, adding drivers, vehicles, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Metrc Learn</li> <li>Metrc Support (portal)</li> <li>Getting started with Metrc</li> </ul>
<b>Week 2</b> Dates: April 6-12	<ul style="list-style-type: none"> <li>Continue set up of Admin dropdown</li> <li>Take the Advanced Transporter Training in Metrc Learn</li> </ul>	<ul style="list-style-type: none"> <li>Best practices documents</li> <li>Metrc Learn</li> </ul>
<b>Week 3 &amp; 4</b> Dates: April 13-26	<ul style="list-style-type: none"> <li>Develop Standard Operating Procedures (SOP) for Metrc</li> <li>Prepare for Metrc transfer manifests</li> </ul>	<ul style="list-style-type: none"> <li>Metrc Expert (in system)</li> </ul>
<b>Week 5 &amp; beyond</b> Dates: April 27-June 30	<ul style="list-style-type: none"> <li>Begin receiving Metrc transfer manifests and transporting packages with Metrc package tags</li> <li><b>Important:</b> Last day Transporters should be receiving and transporting BioTrack packages is June 10</li> <li>Export any data needed from BioTrack for historical purposes</li> </ul>	<ul style="list-style-type: none"> <li>Metrc Expert (in system)</li> </ul>

# Onboarding to Metrc

# Getting started with Metrc

*Your first steps in getting credentialed into the system.*



**1**

Sign up for New  
Business Training



**2**

Complete New  
Business Training in  
Metrc Learn



**3**

Receive log in  
credentials from Metrc



**4**

Validate  
credentials by  
logging in



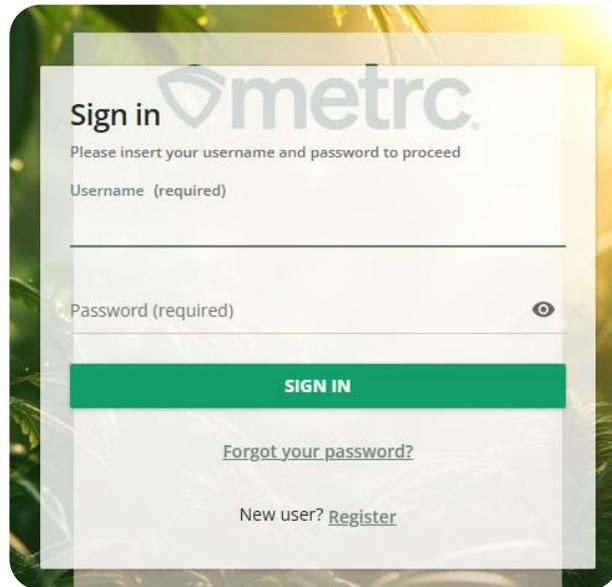
**5**

Continue to improve  
your use of the Metrc  
system

# Metric New Business Training

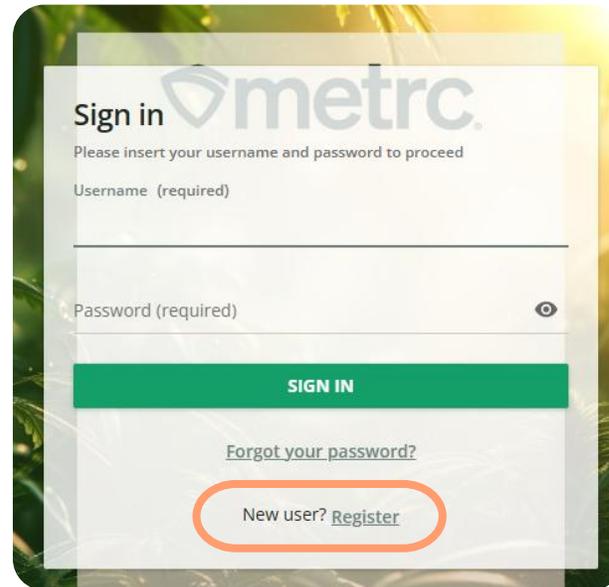
Available April 1

To begin with Metric, all new users must create an account in Metric Learn.



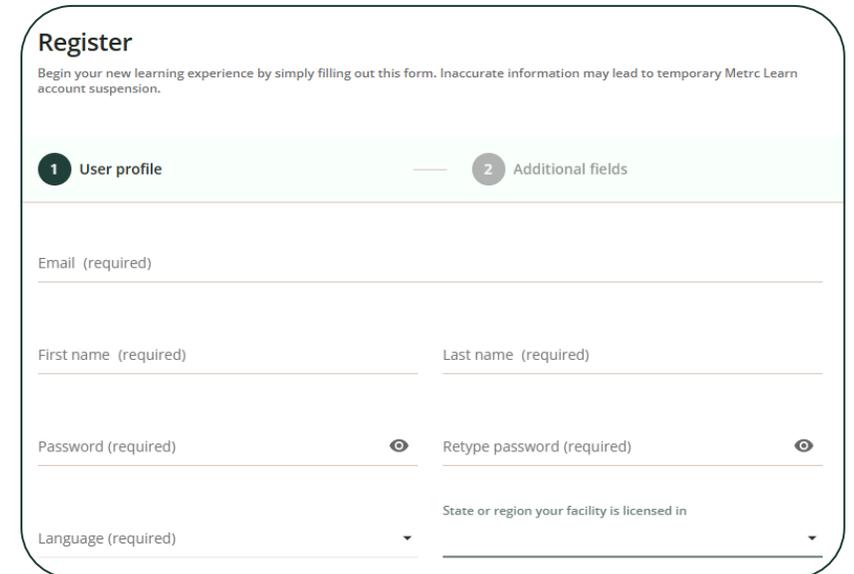
1

Navigate to Metric Learn  
<https://learn.metric.com>



2

Click "Register" next to  
New user?



3

Complete registration to  
setup your user profile

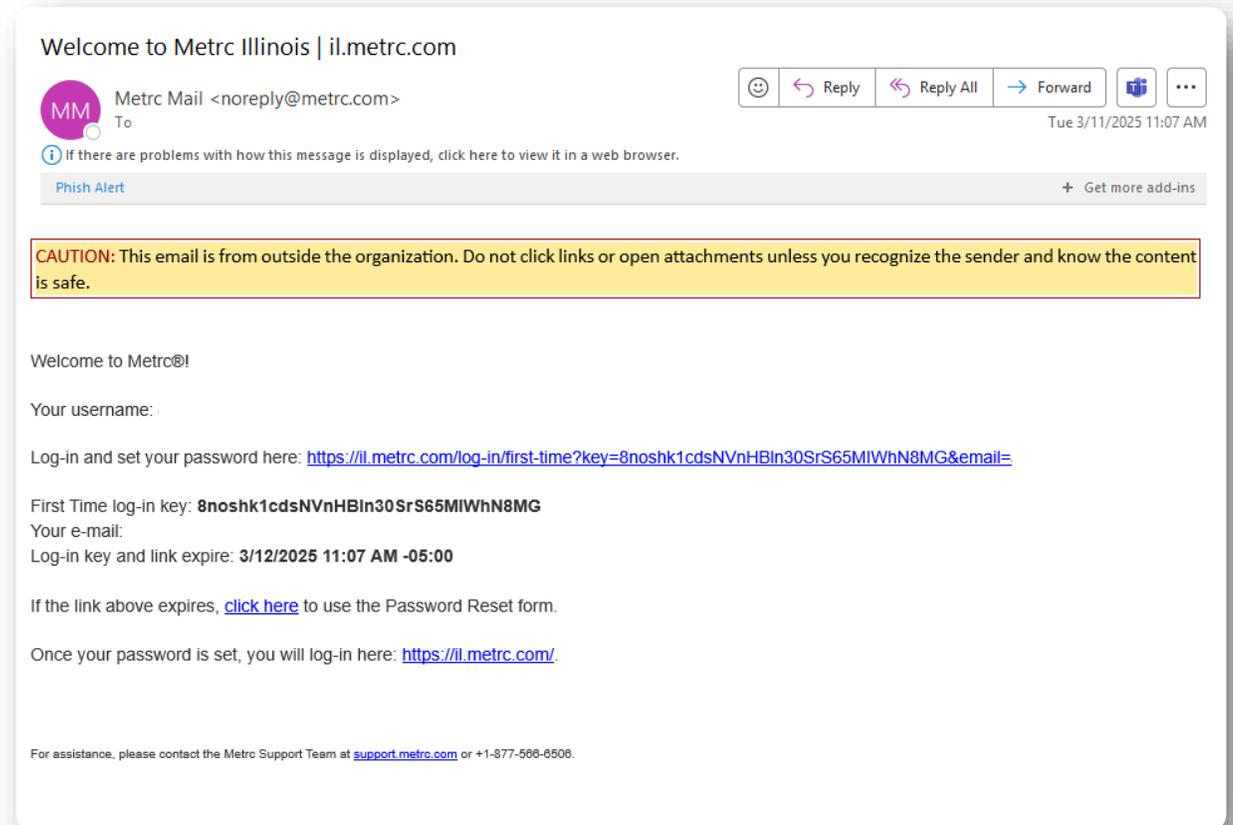
# Metric New Business Training

*Once you complete the training and pass your assessment, your information will be sent to Metric Support.*



# Receive and validate Metrc login credentials

- 1 You will receive an email from Metrc containing user credentials for the Metrc system.
- 2 Log into Metrc within 72 hours of receiving your welcome email to begin working in Metrc.
- 3 Setup your User Profile including a password and security question.



# Additional Metrc Learn training

*Supplemental training is not required but highly encouraged to aid in a seamless onboarding experience.*

- 1 Login to Metrc Learn
- 2 Navigate to Assigned Coursework
- 3 Take the Advanced Transporter training



# Setting up your business

# Adding Employees

*Admins should setup employees and system permissions.*

Adding employees and setting employee permissions is accessible through the Admin dropdown on the navigational toolbar.

- All Employees information should be entered and saved.
- Online access does not need to be granted.
- Proper View or Manage permissions should be set based on the user's role.
- Employees and permissions can be added or removed at anytime.

### Add Licensed Employees

Employee # 1

Employee Lic. Number	<input type="text"/>	Permissions	<b>Packages Page</b>	<input type="checkbox"/> View
	<input checked="" type="checkbox"/> Enable online access to this Facility		Grids (req'd)	<input type="checkbox"/> Manage
Notification E-mail	<input type="text"/>		Inventory	<input type="checkbox"/> Manage
Home	- Select Home -		Create/Submit/Disc.	<input type="checkbox"/> Manage
			Notes	<input type="checkbox"/> Manage
<b>Employment</b>	<input type="checkbox"/> Owner at this Facility		<b>Transfers Menu</b>	
	<input type="checkbox"/> Manager at this Facility		Licensed & External Templates	<input type="checkbox"/> View <input type="checkbox"/> Manage
	<input type="checkbox"/> Financial Contact at this Facility		<b>Trips Menu</b>	
	<input type="checkbox"/> Budtender (Agent)		All	<input type="checkbox"/> View <input type="checkbox"/> Manage
	<input type="checkbox"/> Manager		<b>Financials Menu</b>	
	<input type="checkbox"/> Manager (Agent-in-Charge)		All	<input type="checkbox"/> Manage
	<input type="checkbox"/> Owner		Invoices	<input type="checkbox"/> View
	<input type="checkbox"/> Trimmer		<b>Reports Menu</b>	
			All	<input type="checkbox"/> View
			<b>Admin Menu</b>	
			Tag Orders	<input type="checkbox"/> Manage
			Tags	<input type="checkbox"/> Manage
			Locations	<input type="checkbox"/> Manage
			Strains	<input type="checkbox"/> Manage
			Items	<input type="checkbox"/> Manage
			Transporters	<input type="checkbox"/> Manage
			Employees	<input type="checkbox"/> View <input type="checkbox"/> Manage

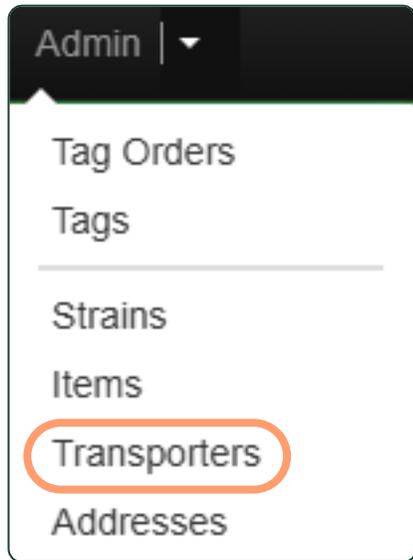
+ 1

**Please note:**  
All new employees granted online access via the "Enable online access to this Facility" checkbox above will receive an e-mail with instructions and a hyperlink to log directly into their User Profile.  
**If online access is granted:**  
Once logged in, the User will need to update their security settings. The e-mail will contain the User's Username, link expiration date/time, and the Metrc web address.

**Create Employees** **Cancel**

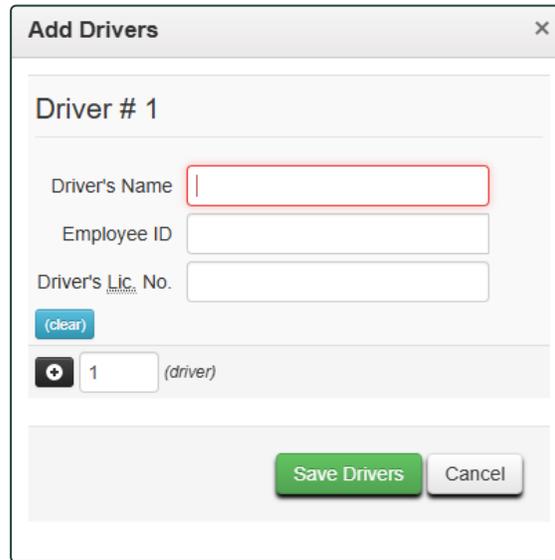
# Adding Drivers and Vehicles

Your system Administrator (Admin) should set up drivers and vehicles to ensure compliant reporting.



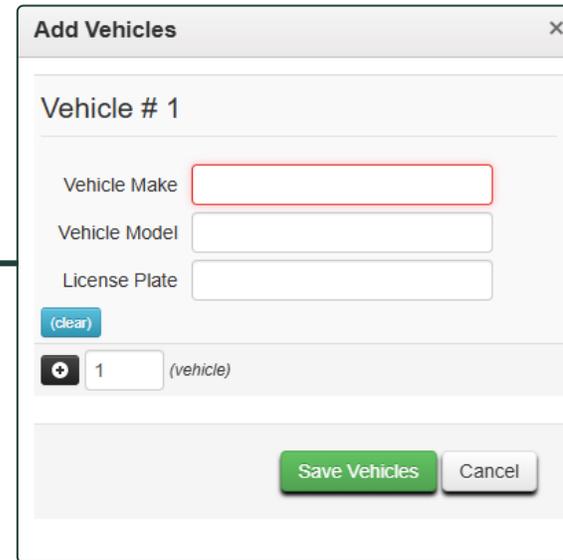
1

Navigate to Admin > Transporters to access the Transportation grid



2

Select Drivers > Add Drivers, then input information and Save



3

Select Vehicles > Add Vehicles, then input information and Save

All Drivers and Vehicles information is saved on the Transportation grid for easy access.

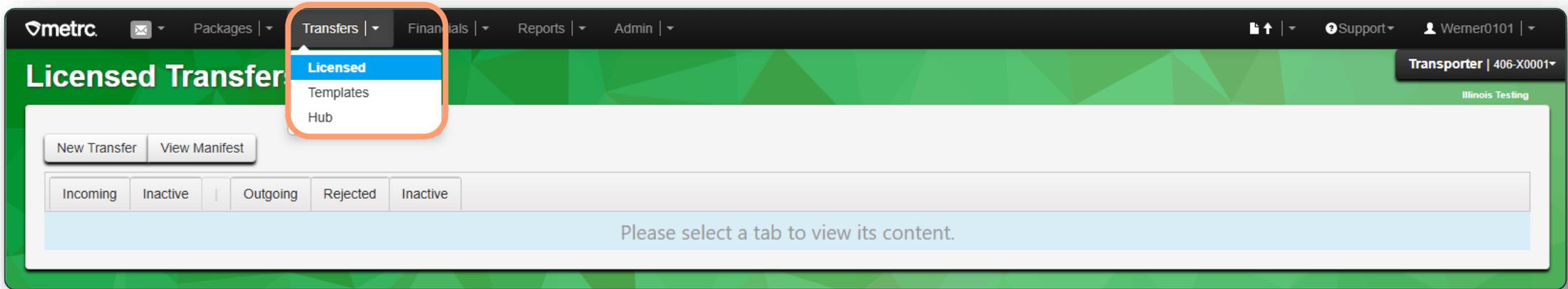
You can Edit and/or Copy information at anytime.

**Important:**  
The Vehicle Certification Number should be added to the "Make" field

# Key system features

# Transfers overview

*Metrc system functionality for licensed Transporters.*



Transfers functionality is available from the Transfers dropdown on the navigational toolbar:

**Licensed  
Transfers**

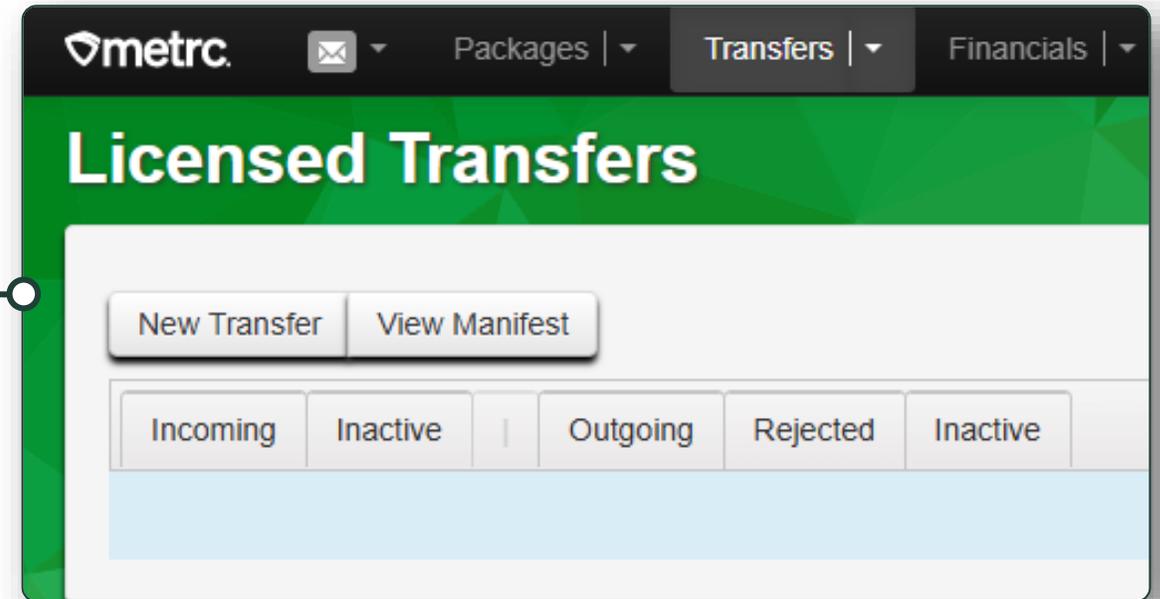
**Transfers  
HUB**

# Licensed Transfers overview

*Metrc system functionality for licensed Transporters.*

The Licensed Transfers grid allows you to:

- View a Transfer Manifest
- View and manage transfers that are:
  - Incoming
  - Inactive incoming or outgoing
  - Outgoing
  - Rejected



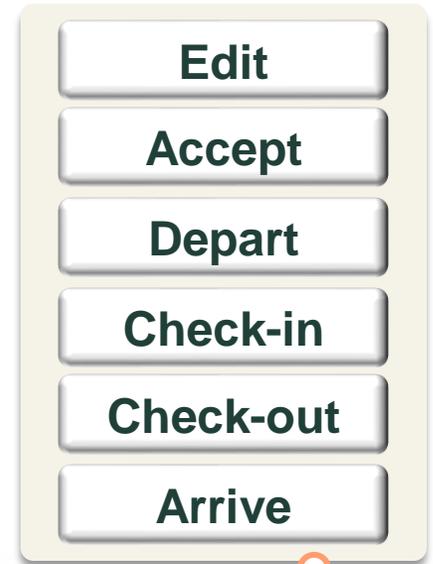
# Licensed Transfers

## Overview and tips

- ✓ Must be created any time a package moves from one licensed facility to another – *even on the same property.*
- ✓ The destination facility can reject some or all packages.
- ✓ Partial packages cannot be received or rejected.
- ✓ A rejected package will require the originating licensee to return the package back into their inventory.

# Transfers HUB

A licensed transporter who has been designated by the shipping licensee to transfer packages will have selectable buttons within their Transfers Hub.

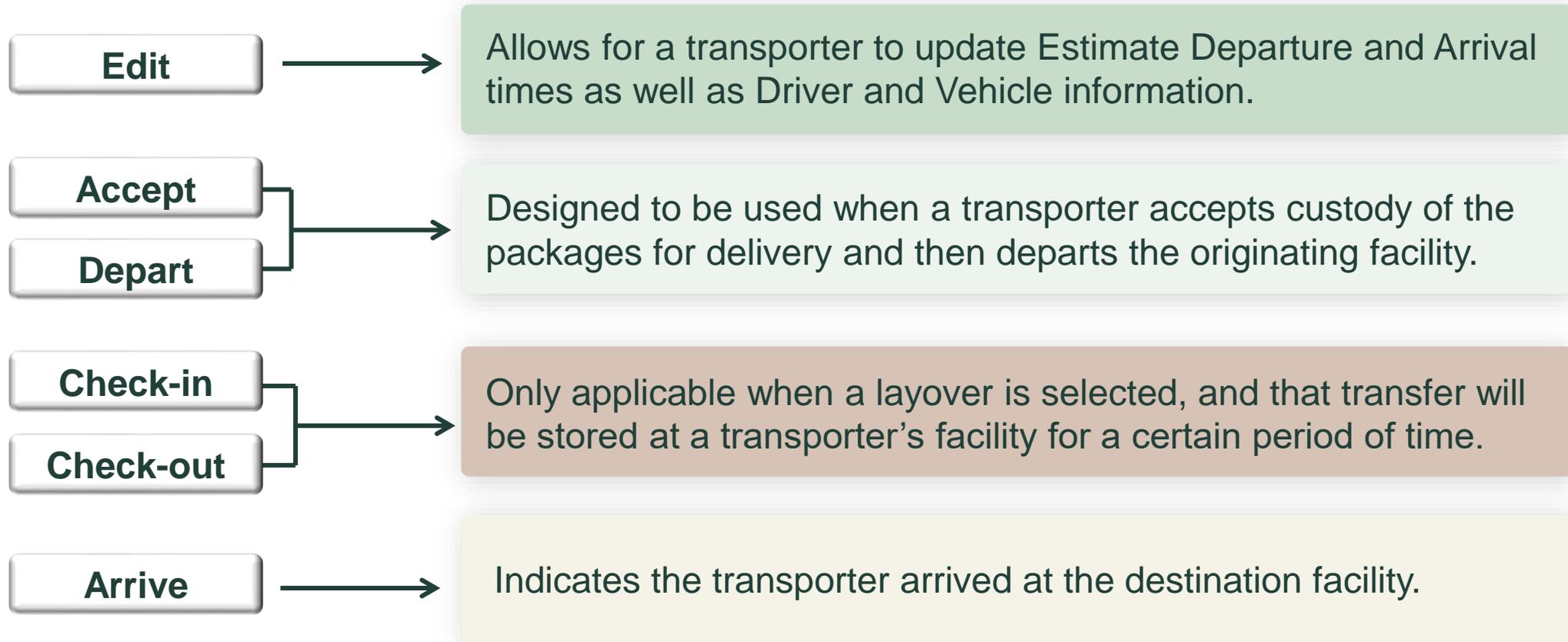


The screenshot shows the 'Transfers Hub' interface. At the top, there is a navigation bar with 'metrc.' logo and various menu items: Packages, Transfers, Financials, Reports, Admin. On the right, there are icons for Support and a user profile 'Werner0101'. Below the navigation bar, the page title 'Transfers Hub' is displayed. A 'View Manifest' button is located in the top left. The main content area is a table with columns for Manifest, Origin, Destination, Direction, Driver, Vehicle Info, Pkg's, Accepted, ETD, ATD, ETRD, ATRD, ECI, ACI, ECO, ACO, ETA, ATA, ETRA, ATRA, and Voided. A single record is visible in the table. To the right of the table, there is a vertical menu with buttons: Edit, Accept, Depart, Check-In, Check-Out, and Arrive. An orange circle highlights the 'Arrive' button in this menu, with a thin orange line extending downwards from it towards the 'Arrive' button in the screenshot below.

Manifest	Origin	Destination	Direction	Driver	Vehicle Info	Pkg's	Accepted	ETD	ATD	ETRD	ATRD	ECI	ACI	ECO	ACO	ETA	ATA	ETRA	ATRA	Voided
0000001503	020-X0001 IL Testing - AU Cultivation Center	030-X0001 IL Testing - AU Infuser 01	→ Outbound	Mordecai Brown	Make: Ford Model: Van Lic. Plate: CARGO	1		03/26/2025 05:17 pm				03/26/2025 08:09 pm			03/26/2025 08:09 pm		03/26/2025 07:17 pm			No

# Transfers HUB

*In chronological order, these buttons are reportable actions a transporter licensee takes with each transfer.*



# Editing Licensed Transfers

Once the transfer is registered, both the transporter and destination licensees can see the transfer information.

- The designated transporter can edit certain details within the manifest from the Transfers Hub, while the destination licensee can view all information that has been registered.
- The “Edit” button allows for a transporter to update Estimate Departure and Arrival times as well as Driver and Vehicle information.

**Edit Transporter Info**

Manifest	0000001503	Transfer Type	Unaffiliated Transfer
Originating Lic. No.	020-X0001	Destination Lic. No.	030-X0001
Originating Name	IL Testing - AU Cultivation Center	Destination Name	IL Testing - AU Infuser 01
Main Phone No.		Main Phone No.	
Mobile Phone No.		Mobile Phone No.	

Delivery Direction  
**OUTBOUND // TO DESTINATION**

Est. Departure	03/26/2025 today	Est. Arrival	03/26/2025 today
05 : 17 PM		08 : 17 PM	
Est. Check-In	03/26/2025 today	Est. Check-Out	03/26/2025 today
08 : 09 PM		08 : 09 PM	

Planned Route: Right on Bravo, left on Charlie

Driver 1	Type part of the Driver Name... (clear)	Vehicle 1	Type part of the vehicle make, mc (clear)
Driver's Name	Mordecai Brown	Vehicle Make	Ford
Employee ID	IL239-130	Vehicle Model	Van
Driver's Lic. No.	IL-253-5424	License Plate	CARGO
Layover Leg	From And To Layover		

1 (details)

**Update Transporter Info** Cancel

# Check-in vs. check-out functionality

Only applicable when a layover is selected, and that transfer will be stored at a transporter's facility for a certain period of time.

**Transfers Hub**

View Manifest

Transfers

Manifest	Origin	Destination	Direction	Driver	Vehicle Info	Pkg's	Accepted	ETD	ATD	ETRD	ATRD	ECI	ACI	ECO	ACO	ETA	ATA	ETRA	
▶ 0000001503	020-X0001 IL Testing - AU Cultivation Center	030-X0001 IL Testing - AU Infuser 01	→ Outbound	Mordecai Brown	Make: Ford Model: Van Lic. Plate: CARGO	1		03/26/2025 05:17 pm					03/26/2025 08:09 pm	03/27/2025 11:42 am	03/26/2025 08:09 pm	03/27/2025 11:43 am	03/26/2025 07:17 pm		

A **Check-In** selection indicates the transporter has arrived at their layover facility.

Select **Check-Out** once you are leaving the layover facility to continue on the planned route.

# Transfers Hub grid

Historical transfer tracking details product movement.

**Licensed Transfers**

New Transfer View Manifest

Incoming Inactive Outgoing Rejected Inactive

Manifest	Inv. Nbr	Origin	Type	Pkg's	ETD	ATD	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA
0000001602		020-X0001 IL Testing - AU Cultivation Center	Unaffiliated Transfer	1	03/27/2025 05:42 pm		03/27/2025 05:42 pm						
0000001601		020-X0001 IL Testing - AU Cultivation Center	Affiliated Transfer	1	03/27/2025 05:39 pm	03/27/2025 05:54 pm	03/27/2025 05:39 pm	03/27/2025 05:57 pm					

Transporter Direction ECI ACI ECO ACO

408-X0001 IL Testing - Transporter 01	→ Outbound	03/27/2025 05:39 pm		03/27/2025 09:39 pm	
--	------------	------------------------	--	------------------------	--

Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)

Package	Src. H's	Src. Pkg's	Item	Category	Item Strain	Lab Testing	Shipped Qty.	Gross Wgt.	Ship. Whsle. Price	Received Qty.	Rcv. Whsle. Price	Status
1A4FF0300000016000000038	2023-02-27-Harvest Location-M	1A4FF0300000016000000017	Food Grade Rosin	Concentrate (Bulk)		TestPassed	469.3 g		N/A		N/A	Shipped

Page 1 of 1 20 rows per page Viewing 1 - 1 (1 total)

Page 1 of 1 20 rows per page Viewing 1 - 2 (2 total)

# Packages grid – Receiving facility’s view

*Historical transfer tracking details product movement across facilities.*

**Packages**

Active | On Hold | Inactive | In Transit | Transferred

New Packages | Submit for Testing | New Transfer | Change Locations | Change Items | Change Req'd LTBs | Adjust | Change Notes | Finish | Edit Shelf Life

Tag	Src. H's	Src. Pkg's	Src. Pj's	Location	Item	Category	Item Strain	Quantity	P.B. No.	LT Status	A.H.	A.R.	Date	Rcv'd	Exp.	L.T.E.
1A4FF0300000016000000046	BH 2.21.25	1A4FF0300000016000000026		Transfer Vault	Buds - Blackhawk Haze	Bud/Flower (Bulk)	Blackhawk Haze	100 g		TestPassed	No	No	03/27/2025	03/27/2025		

Source Harvests | Lab Test Batches | Lab Results | **History**

Description	Employee	Date	Reported	Sources	External App
Packaged 100 Grams of Buds - Blackhawk Haze from another Package - Took 100 Grams of Buds - Blackhawk Haze from Package 1A4FF0300000016000000026 - Package Type: Product - Location: Packages Vault - Location Type: Default	Myra Chinn (Chinn0•••)	03/27/2025	03/27/2025 06:22 pm	User	
Package added to Manifest # 0000001603 - From: IL Testing - AU Cultivation Center (020-X0001) - To: IL Testing - AU Dispensary (050-X0001) - License Type: Licensed - Transfer Type: Affiliated Transfer	Myra Chinn (Chinn0•••)		03/27/2025 06:22 pm	User	
100 Grams accepted from Manifest # 0000001603 by IL Testing - AU Dispensary (050-X0001) - Location: Transfer Vault - Location Type: Default	Myra Chinn (Chinn0•••)		03/27/2025 06:24 pm	User	

Page 1 of 1 | 20 rows per page | Viewing 1 - 3 (3 total)

# Transfer Manifests

View and edit through the Transfers HUB.

## Important reminder:

Before you accept & depart, check the manifest for accuracy



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.

<b>Manifest No.</b>	000001503	<b>Date Created</b>	3/26/2025 6:42 PM
<b>Originating Entity</b>	IL Testing - AU Cultivation Center	<b>For Agency Use Only</b>	
<b>Originating License Number</b>	020-X0001		
<b>Address of Originating Entity</b>			
<b>Phone No. of Originating Entity</b>			
<b>1. Destination</b>	IL Testing - AU Infuser 01	<b>Destination Phone No.</b>	
<b>Invoice Number</b>	IL5415		
<b>Destination License Number</b>	030-X0001	<b>Date and Approx. Time of Departure</b>	3/26/2025 5:17 PM
<b>Address of Destination</b>	<b>Date and Approx. Time of Arrival</b>		3/26/2025 7:17 PM
	<b>Date/Time Received</b>		
	<b>Notes:</b> details for extenuating circumstances (e.g., road closure, flat tire, etc.)		
<b>Route to be Traveled</b>	Right on Bravo, left on Charlie		
<b>1. Outbound Transporter</b>	IL Testing - Transporter 01	<b>Layover Schedule</b>	
<b>Transporter License Number</b>	406-X0001	<b>Date and Approx. Time of Check-In</b>	3/26/2025 8:09 PM
<b>Address of Transporter</b>	<b>Actual Date/Time of Arrival</b>		3/27/2025 10:42 AM
	<b>Date and Approx. Time of Check-Out</b>		3/26/2025 8:09 PM
	<b>Actual Date/Time of Departure</b>		3/27/2025 10:43 AM
<b>Contact Phone No. for Inquiries:</b> 111-111-1111			
<b>Name of Person Transporting</b>	Mordecai Brown	<b>Employee ID of Driver</b>	IL239-130
<b>State Driver's License No.</b>	IL-253-5424	<b>Signature of Person Transporting</b>	
<b>Make, Model, License Plate No.</b>	Ford Van CARGO	<b>Leg of Layover Trip</b>	From And To Layover
<b>1. Package   Shipped</b>	<b>Production Batch No.</b>	<b>Item Name</b>	<b>Quantity</b>
1A4FF0300000016000000045 Lab Test: TestPassed		Buds - Blue Dream (Buds)	Shp: 1000 g
<b>Item Details</b>	Strain: Blue Dream		
<b>Source Harvest</b>	2023-02-27-Harvest Location-M		
<b>Source Package(s)</b>	1A4FF0300000016000000005		

#### PRODUCT REJECTION (if only a portion of shipment is rejected, circle that portion above)

<b>Name of Person Receiving or</b>			
I confirm that the contents of this shipment match weight records entered above, and I agree to take custody of those portions of this shipment not circled above. Those portions circled were returned to the individual delivering this shipment.			
<b>Signature</b>		<b>Date</b>	
<b>Signature of individual taking receipt of rejected portion of this shipment</b>			

# API connections

# Third-party Integrators in Illinois

*Coming soon! All TPIs will be on Metrc Connect.*

[Metrc.com/validated-integrators/](https://metrc.com/validated-integrators/)

- Easy to find licensed businesses in Metrc's validated integrators list.
- Search and sorting functionality helps users find what they need quickly and easily.



# Metric resources

# Metric resources

*A glance at several resources to support your journey with Metric*



## Support

Our dedicated support team is available through phone and online portal access.

- **Phone:** 877-566-6506
- **Online:** Support.metric.com
- **Available:** M-F, 7 a.m. CT – 9 p.m. CT
- **What to know:** Our team is here to help in your journey with cannabis compliance. We not only have a dedicated team for answering specific questions, but a library of self-help materials for navigating the system.



## Training

On-demand training platform with over 300+ courses right at your fingertips.

- **Access:** Learn.metric.com or through mobile app: Go Learn
- **Available:** 24/7, 365 days
- **What to know:** Metric Learn, our on-demand training portal allows for users to create persona-based learning journeys, access over 300 courses and more! Select trainings also include interactive pieces allowing you to practice new skills out of the production environment.



## Metric Expert

Access support documentation directly in the Metric system.

- **Access:** Available when you log in to your Metric instance
- **Available:** 24/7, 365 days
- **What to know:** Metric Expert is our AI-powered chat tool that allows you to ask questions in the Metric system as you work in real time without having to spend time sifting through documentation.



## Metric.com

Additional information and resources to supplement your needs are available on Metric.com

- **Access:** Metric.com
- **Available:** 24/7, 365 days
- **What to know:** Metric.com offers additional resources including case studies, blogs, guides, and more! Also, for state specific information, navigate to your state partner page to access bulletin documentation (which can also be found in the support portal).

# Metrc Support

*The Metrc team is here to help!*

Every question and conversation counts, and our dedicated support team is here to help.

Our support teams have been with us for a long time – they know and love the industry – so whether you are seeking help navigating the Metrc system, facing technical challenges, or have a general inquiry, we take every interaction seriously and do everything we can to find a resolution quickly.

You can access Metrc Support by phone or online through our Metrc Support portal, which offers the ability to:

- Create a new support case
- View real-time case status
- Live chat with a Metrc Support agent
- Access help documentation and articles

To sign up for the portal, ensure you have Metrc system access.

Scan this QR code  
to access the portal



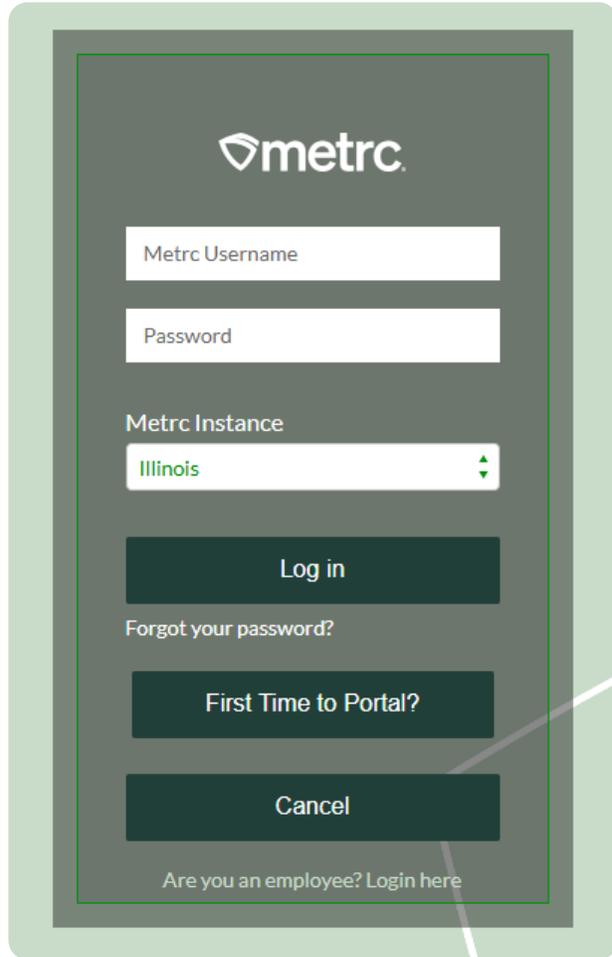
Live chat or online via  
the [Support Portal](#)



Phone: 877-566-6506

# Access the Support Portal

*Login page and first-time users*



A screenshot of the Metrc login page. At the top is the Metrc logo. Below it are two input fields: "Metrc Username" and "Password". Underneath is a dropdown menu for "Metrc Instance" with "Illinois" selected. There are three buttons: "Log in", "First Time to Portal?", and "Cancel". At the bottom, there is a link that says "Are you an employee? Login here".

## Complete this form to access the Metrc Support portal

If this is your first time on the Help Portal, please provide your **Metrc Username** and a **Facility License Number** that it is associated with.

\* Username

\* Metrc Facility License Number

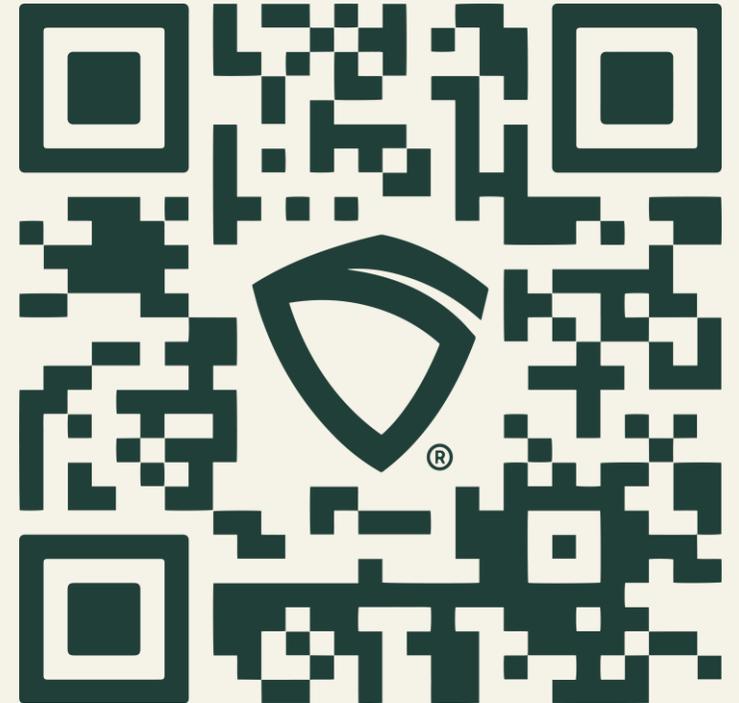
Metrc Instance

Next

# Sharpen your Metrc skills

*Access Metrc Learn, our interactive training resource with 300+ courses*

- ✓ On-demand training available 24/7
- ✓ System functionality training, by facility type
- ✓ Easily track and share your progress
- ✓ Available on-the-go through a mobile app



# Access help right in the Metrc system

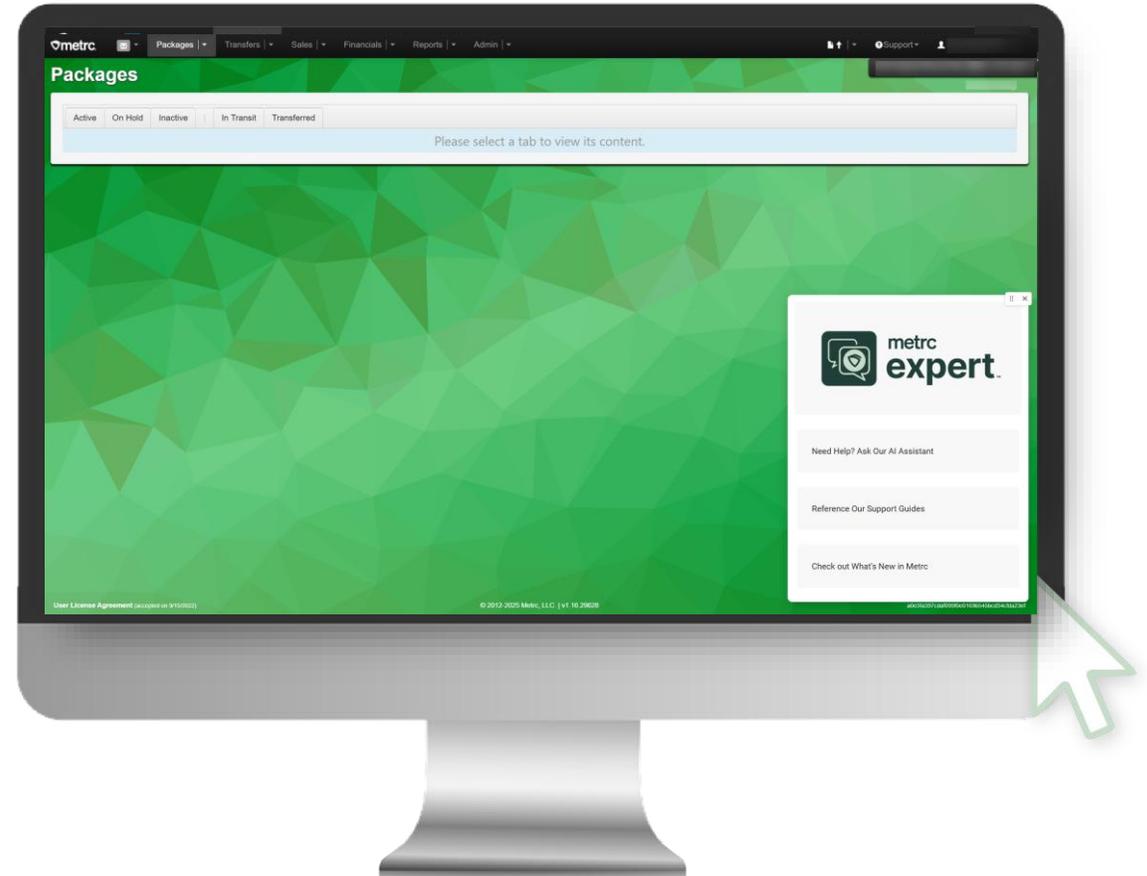
## Metrc Expert

### knowledge base

An innovative state-specific knowledge base is accessible through a widget in the Metrc system.

Leveraging AI, as you interact with the tool and ask questions, it will drive automated responses and deliver personalized customer support with faster responses.

- ✓ Access knowledge base resources directly in the system
- ✓ Minimized disruption to workflows
- ✓ Answers to your questions in seconds
- ✓ Generate a support case or live chat with Metrc Support if further help is needed



# Metrc website & Illinois partner page

*Access state-specific information, and more!*



Welcome to the Illinois partner page! This page provides essential information regarding Illinois' transition to Metrc as the track-and-trace system of record. The implementation plan and timeline outline the transition by license type. For additional details about this transition, please see the full implementation plan and FAQ below.

[Implementation plan](#)

- Implementation plan
- FAQs

*Coming soon!*

- Program overview
- Training information
- Other resources and information

Questions?

# Thank you!

If you have additional questions, reach out to Metrc Support



**Phone: 877-566-6506**



**Live chat or online via the  
Support Portal**