



# Welcome to Metrc

Learn how to access Metrc and training resources

# Welcome

Hello,

We are excited to introduce you to Metrc, a leading provider of track-and-trace, frequently called seed-to-sale, technology for the cannabis industry. Our system is designed to help businesses like yours ensure compliance with state regulations, streamline operations, and maintain transparency throughout the supply chain. As a trusted partner to 30 regulated markets, Metrc is committed to supporting the growth and success of the cannabis industry by providing reliable, secure, and user-friendly solutions.

From cultivation and harvesting to distribution and retail, our system captures critical data points to support transparency, product integrity, and regulatory compliance. At Metrc, we understand that navigating the complexities of the cannabis industry can be challenging. That's why we offer dedicated support and training to help you make the most of our system. Our team of experts are available to assist with any questions or concerns you may have, ensuring a smooth and efficient implementation process. The following pages in this packet will help you get started with Metrc as it becomes your tool for compliance.

We are proud to support your business in compliance and look forward to working together to build a transparent, accountable, and thriving cannabis industry.

Sincerely,  
The Metrc team

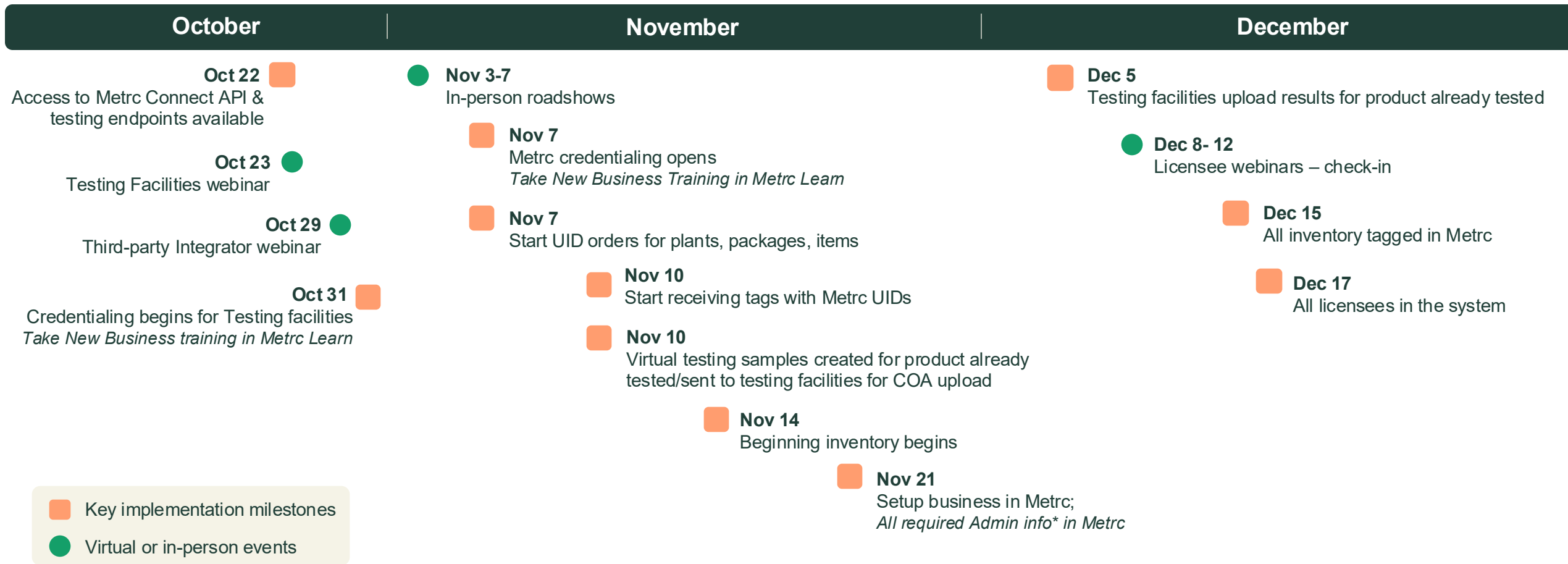
# Why track-and-trace?

*Track-and-trace technology at its core provides the ultimate transparency in a supply chain.*



# Implementation timeline

*This timeline is intended to guide a smooth transition and onboarding into the Metrc system. Updates will be posted on the Metrc New York State Partner Page and the OCM Seed-to-Sale page, with administrators also receiving regular email notifications.*



*\*Admin info – Strains, Items, Processing Jobs, Employees, Locations, Drivers*

# Testing Facilities Licenses

*What to expect as a Testing Facility 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.*

Timing	Actions	Documentation
Week 1	<ul style="list-style-type: none"><li>• Welcome to Metrc introduction webinar</li></ul>	<ul style="list-style-type: none"><li>• Recording + Slides to be shared</li></ul>
Week 2	<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, etc.)</li></ul>	<ul style="list-style-type: none"><li>• Metrc Learn</li><li>• Metrc Support (portal)</li><li>• Getting started with Metrc</li><li>• Beginning Inventory guide</li></ul>
Week 3	<ul style="list-style-type: none"><li>• Take the Advanced Testing Facility training in Metrc Learn</li><li>• Receive Testing Facility resource materials (Advanced Testing Facility Training is a prerequisite)</li><li>• Order UIDs for Metrc Packages</li></ul>	<ul style="list-style-type: none"><li>• Best practices documents</li><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li><li>• Testing Facility User Guide</li></ul>
Week 4 & beyond	<ul style="list-style-type: none"><li>• Develop Standard Operating Procedures (SOP) for Metrc</li><li>• Continue to take Metrc Learn trainings for the Testing Facility license type</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>

# Distributor Licenses

*What to expect as a Distributor 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.*

Timing	Actions	Documentation
Week 1	<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 Expert (in system)</li><li>• Metrc Learn (training)</li><li>• Metrc Support (portal)</li><li>• Getting started with Metrc</li></ul>
Week 2 & 3	<ul style="list-style-type: none"><li>• Continue set up of Admin dropdown</li><li>• Take the Advanced Distributor Training in Metrc Learn</li></ul>	<ul style="list-style-type: none"><li>• Best practices documents</li><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>
Week 4 & beyond	<ul style="list-style-type: none"><li>• Develop Standard Operating Procedures (SOP) for Metrc</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>

# Vertically Integrated/Microbusiness Licenses

*What to expect as a Vertically Integrated or Microbusiness 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.*

Timing	Actions	Documentation
<b>Week 1</b>	<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, strains, items, drivers, vehicles, etc.)</li><li>• Begin ordering Metrc Plant, Package, and Items UIDs</li><li>• Begin adding Processing job types</li></ul>	<ul style="list-style-type: none"><li>• Metrc Learn (training)</li><li>• Metrc Support (portal)</li><li>• Getting started with Metrc</li><li>• Beginning Inventory guide</li><li>• Processing Jobs Guide</li><li>• Metrc plant tagging best practices</li></ul>
<b>Week 2 &amp; 3</b>	<ul style="list-style-type: none"><li>• Take Advanced Learnings in Metrc Learn: Cultivation, Manufacturing, Retailer</li><li>• Begin tagging inventory with UIDs: Plants, Packages, Items</li><li>• Develop Standard Operating Procedures (SOP) for Metrc</li></ul>	<ul style="list-style-type: none"><li>• RFID Overview</li><li>• Best practices documents</li><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>
<b>Week 4 &amp; beyond</b>	<ul style="list-style-type: none"><li>• Continue Metrc Learn training with additional facility type journey: Cultivation, Manufacturer, Retailer</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>

# Cultivators/Cooperative Licenses

*What to expect as a Cultivator or Cooperative 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.*

Timing	Actions	Documentation
Week 1	<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, strains, items, drivers, vehicles, etc.)</li><li>• Begin ordering Metrc Plant, Package, and Items UIDs</li><li>• Begin adding strains and items</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li><li>• Getting started with Metrc</li><li>• Metrc tagging best practices</li><li>• Processing Jobs Guide</li></ul>
Week 2 & 3	<ul style="list-style-type: none"><li>• Begin tagging inventory with UIDs: Plants, Packages, and Items</li><li>• Develop Standard Operating Procedures (SOP) for Metrc</li><li>• Take Advanced Cultivator Training in Metrc Learn</li></ul>	<ul style="list-style-type: none"><li>• Beginning Inventory Guide</li><li>• RFID Overview</li><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>
Week 4 & beyond	<ul style="list-style-type: none"><li>• Continue Metrc Learn training with Cultivation Journey</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>



# Processor Licenses

*What to expect as a Processor 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.*

Timing	Actions	Documentation
Week 1	<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, strains, items, drivers, vehicles, etc.)</li><li>• Begin ordering Metrc package and item UIDs</li><li>• Begin adding Processing job types</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li><li>• Getting started with Metrc</li><li>• Processing Jobs Guide</li><li>• Metrc tagging best practices</li></ul>
Week 2 & 3	<ul style="list-style-type: none"><li>• Begin tagging inventory with UIDs: Packages and Items</li><li>• Begin virtual testing process for any product tested prior to Metrc</li><li>• Develop Standard Operating Procedures (SOP) for Metrc</li><li>• Take Advanced Manufacturing Training in Metrc Learn</li></ul>	<ul style="list-style-type: none"><li>• Beginning Inventory Guide</li><li>• RFID Overview</li><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>
Week 4 & beyond	<ul style="list-style-type: none"><li>• Continue Metrc Learn training with Manufacturer Journey</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>

# Dispensary Licenses

*What to expect as a Dispensary 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.*

Timing	Actions	Documentation
Week 1	<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, items, API keys, locations, etc.)</li><li>• Begin ordering Metrc package UIDs</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li><li>• Getting started with Metrc</li></ul>
Week 2 & 3	<ul style="list-style-type: none"><li>• Develop Metrc workflows</li><li>• Begin tagging on-hand inventory with Metrc Package UIDs</li><li>• Take Metrc Learn Advanced Retailer Training</li></ul>	<ul style="list-style-type: none"><li>• Best practices documents</li><li>• Beginning Inventory Guide</li><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>
Week 4 & beyond	<ul style="list-style-type: none"><li>• Continue Metrc Learn training with Retailer Journey</li></ul>	<ul style="list-style-type: none"><li>• Metrc Expert (in system)</li><li>• Metrc Learn (training)</li></ul>

# Getting started with Metrc

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



**1**

## **Sign up for New Business Training.**

To begin with Metrc, all new users must create an account in [Metrc Learn](#).



**2**

## **Complete New Business Training in Metrc Learn.**

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



**3**

## **Receive log in credentials from Metrc.**

You will receive an email from Metrc containing user credentials for the Metrc system.



**4**

## **Validate credentials by logging in.**

Log into Metrc within 72 hours of receiving your welcome email and begin working in Metrc.



**5**

## **Continue to improve your use of the Metrc system.**

Visit [Metrc Learn](#) to find additional resources on how to navigate Metrc.

# Metrc resources

*A glance at several resources to support your journey with Metrc.*



## Support

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

- **Phone:** 877-566-6506
- **Online:** Support.metrc.com
- **Available:** M-F, 8 a.m. ET – 10 p.m. ET
- **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.metrc.com or through mobile app: Go Learn
- **Available:** 24/7, 365 days
- **What to know:** Metrc 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.



## Metrc Expert

Access support documentation directly in the Metrc system.

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



## Metrc.com

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

- **Access:** Metrc.com
- **Available:** 24/7, 365 days
- **What to know:** Metrc.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



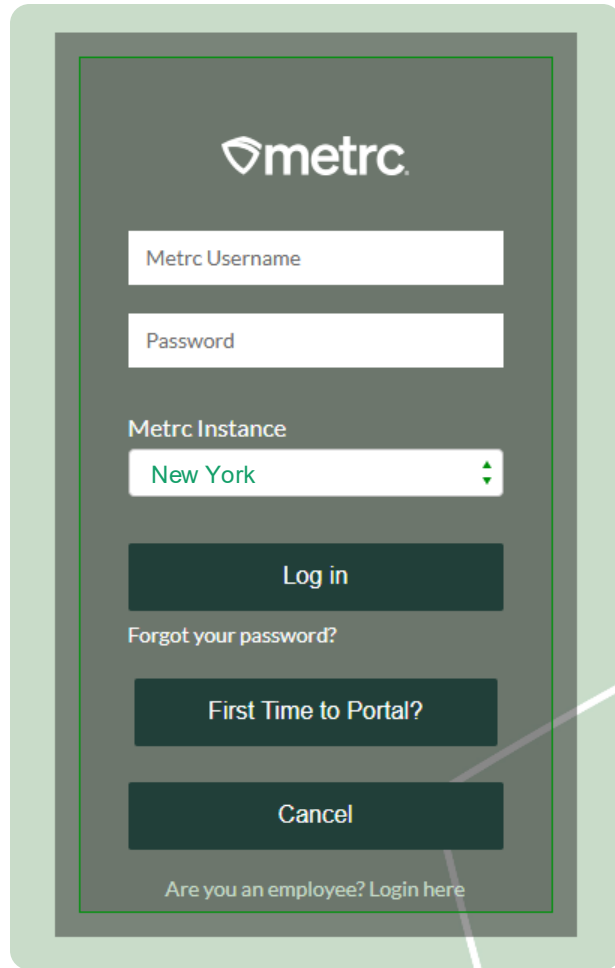
Live chat or online via  
the [Support Portal](#)



Phone: 877-566-6506

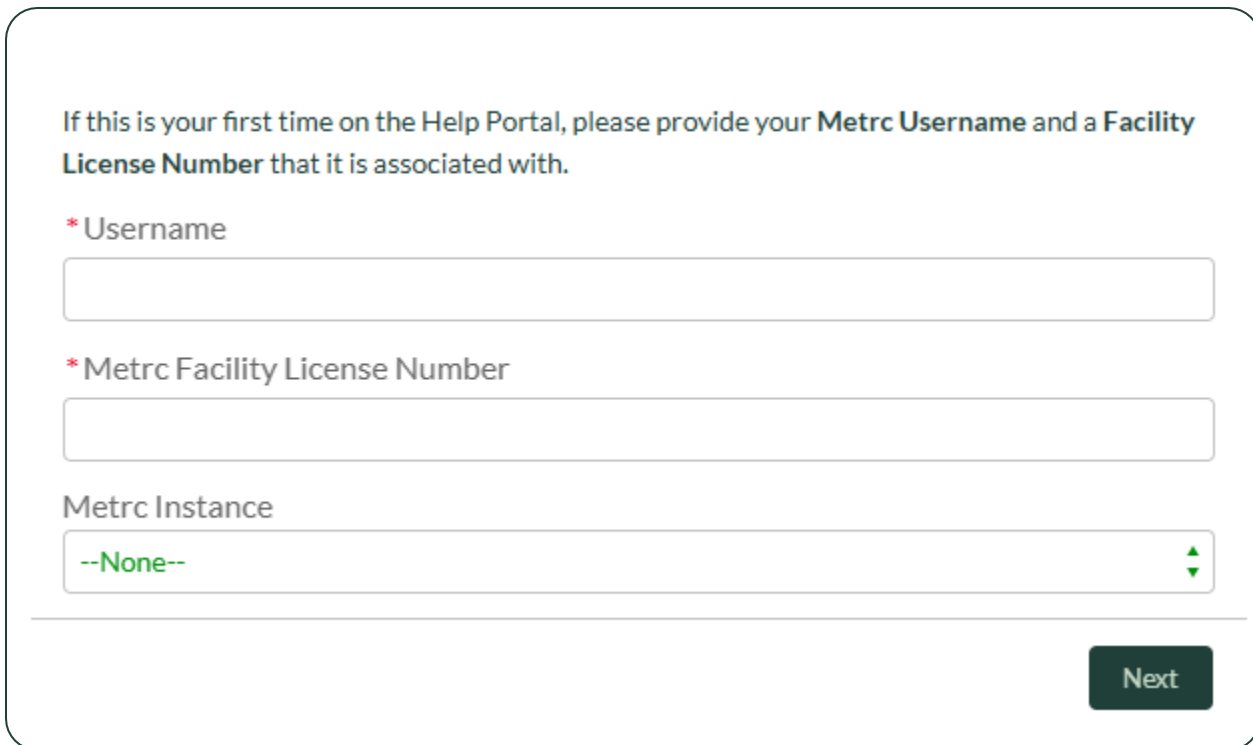
# Access the Support Portal

*Login page and first-time users*



A screenshot of the Metrc login page. The page has a dark gray background with the Metrc logo at the top. Below the logo are input fields for 'Metrc Username', 'Password', and 'Metrc Instance' (with 'New York' selected). There are three buttons: 'Log in', 'First Time to Portal?', and 'Cancel'. At the bottom, there is a link 'Are you an employee? Login here'.

**Complete this form to access the Metrc Support portal**



A form to access the Metrc Support portal. It includes a message: '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.' Below this are three input fields: '\* Username', '\* Metrc Facility License Number', and 'Metrc Instance' (with '--None--' selected). A 'Next' button is at the bottom right.

# 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



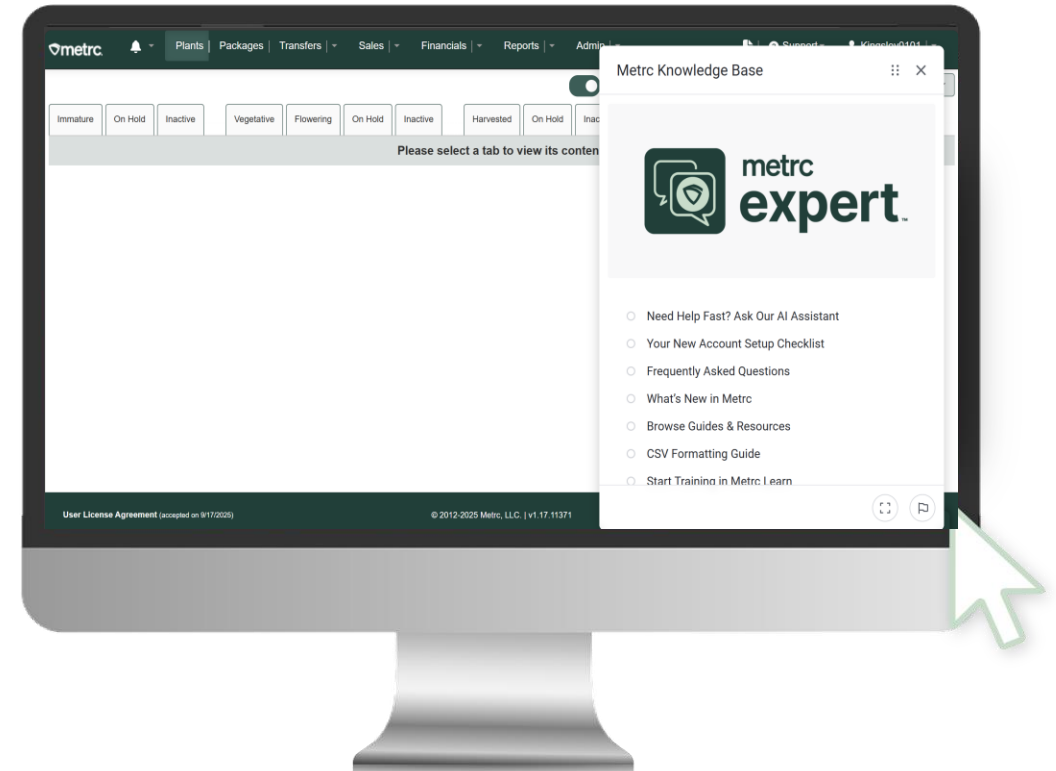
# Access help right in the Metrc system

## 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





# Questions?

Reach out to Metrc Support



**Phone: 877-566-6506**



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