



Bulletin Number: CO_IB_5.24.23_Sales Deliveries	Distribution Date: 5/24/2023	Effective Date: 7/13/2023
Contact Point: Metrc® Support	Subject: New feature update	
Reason: Provide information on the latest feature release.		

Metrc is pleased to provide information on the latest system enhancements planned to deploy on July 13, 2023. These enhancements include:

- **Sales Delivery Hub**
 - **Note:** For Programs that allow licensees to deliver sales directly to the consumer.
 - Enhancements made to improve workflows within the Sales Delivery Hub function in Metrc and to enhance the Sales Delivery Hub functionality for Store licensees that utilize a third-party integrator.

Sales Delivery Hub For Transporters

For licenses that are permitted to conduct sales deliveries directly to a consumer, sales deliveries can now be recorded by inputting the Transporter license that is performing the delivery. This process should be followed when a Transporter license, rather than a Store License employee, is being used to physically deliver the sale. Once the sales delivery is created, the Transporter license will have the ability to use the Sales Delivery Hub to record the following:

- Acceptance of the delivery
- Departure from the Store
- Arrival at the destination
- Verification of both ID and payment

Upon completion of the full process, the sales delivery must be completed in Metrc by the Store license. If the delivery was rejected, it should be marked as rejected within the Store’s license.

To begin the delivery process, navigate to the Sales Delivery grid by selecting the Deliveries option under the Sales area found on your navigation bar at the top of the screen **(Figure 1)**.

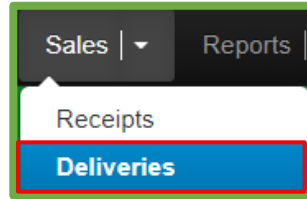


Figure 1: Sales Menu with Deliveries Option

Please Note: If this option is not available, an Administrator will need to grant the user permission.

From the Sales Deliveries grid, select the “Record Deliveries” button to begin the process of creating the Sales Delivery as shown in **Figure 2**.

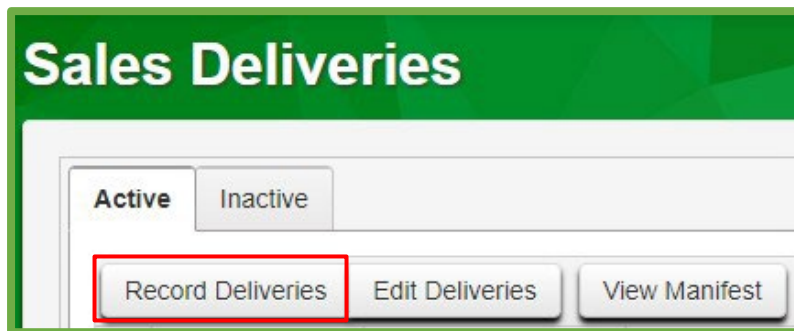


Figure 2: Record Deliveries button

In the Record Deliveries action window that appears, enter the details of the Sales Delivery, which now offers the ability to assign a Transporter’s license that will be physically delivering the sale as shown in **Figure 3**. After all required information is entered, select the “Record Sales Delivery” button to complete the sales delivery creation process.

Record Deliveries

Sales Delivery # 1 (clear)

Sale Date/Time: 09/15/2021 today
12 : 18 PM

Consumer Id (optional)
Name (optional)

Est. Departure: 09/15/2021 today
12 : 18 PM

Est. Arrival: 09/15/2021 today
12 : 18 PM

Planned Route: Example Route

Address: 1 Example Ln
Address Cont.:
City: Boston
County (optional):
State + Zip: MA 02129

Transporter Facility: DO200001

Driver 1: Type part of the Driver Name... (clear)
Employee ID: X23421
Driver's Name: Joe Smith
Driver's Lic. No.: S5653234
Phone No. for Questions: 1234567890

Vehicle 1: Type part of the vehicle make, m... (clear)
Vehicle Make: Ford
Vehicle Model: E350
License Plate: WL43TC

Package # 1: ABCDEF012345670000013802 (clear)
Quantity: 7 Grams
Total Price: \$ 90

(package)

+ 1

Record Sales Deliveries Cancel

Figure 3: Alternate Delivery License

After the sales delivery is created by the Store licensee, it will appear in the new Sales Delivery Hub within the Transporter’s Metrc license.

To navigate to the Sales Delivery Hub, select Delivery Hub under the Sales area found on the top navigational bar as shown in **Figure 4**.



Figure 4: Navigate to Delivery Hub

From the Sales Delivery Hub grid, all deliveries associated with the transporter license are visible. **Note:** The transporter license can edit all transporter details (drivers, vehicles, etc.) but cannot edit the content of the delivery.

After the Transporter license has arrived at the Store’s facility and accepted the delivery, the delivery can be accepted by using the “Accept” button as shown in **Figure 5**.

Delivery	Sales	Customer Type	Destination	Direction	Driver	Vehicle Info	Accepted	ATD	ATA	ATRD	ID.Verified	Pay	
▶ 0000000061	09/15/2021 12:18 pm	Consumer	Street1: 1 Example Ln Street2: City: Boston State: MA Postal Code: 02129	→ Outbound	Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC					No		<input type="button" value="Edit"/> <input type="button" value="Accept"/>

Figure 5: Accept Sales Delivery

After accepting the delivery in Metric, confirmation of the Transporter’s departure can be completed using the “Depart” button shown in **Figure 6**.

Delivery	Sales	Customer Type	Destination	Direction	Driver	Vehicle Info	Accepted	ATD	ATA	ATRD	ID.Verified	Pay	
▶ 0000000061	09/15/2021 12:18 pm	Consumer	Street1: 1 Example Ln Street2: City: Boston State: MA Postal Code: 02129	→ Outbound	Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC	09/15/2021 12:28 pm				No		<input type="button" value="Edit"/> <input type="button" value="Depart"/>

Figure 6: Mark Departure from Retailer Facility

When making a delivery, the end recipient’s ID must be verified. Once ID verification is confirmed, the “Verify ID” button should be used as shown in **Figure 7**.

Delivery	Sales	Customer Type	Destination	Direction	Driver	Vehicle Info	Accepted	ATD	ATA	ATRD	ID.Verified	Pay	
▶ 0000000061	09/15/2021 12:18 pm	Consumer	Street1: 1 Example Ln Street2: City: Boston State: MA Postal Code: 02129	→ Outbound	Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC	09/15/2021 12:28 pm	09/15/2021 04:30 pm			No		<input type="button" value="Edit"/> <input type="button" value="Verify ID"/>

Figure 7: Verify ID of Recipient

Selecting the “Verify ID” button will trigger an action window where the Payment Type - Cash or Electronic - should be captured using the dropdown shown in **Figure 8**.

Figure 8: Verify ID Action Window & Payment Type

Once this process is completed by the Transporter, the Store licensee will then be able to complete the sales delivery in their license by selecting the “Complete” button in the Sales Deliveries grid as shown in **Figure 9**.

Delivery	Transporter	Sales	Customer Type	Patient	Driver	Vehicle Info	Pkg's	Total	Recorded	State	Action
0000000071	DO200001 MA Delivery Courier	10/12/2021 12:35 pm	Consumer		Joe Smith	Make: Ford Model: E350 Lic. Plate: WL43TC	1	\$40.00	10/12/2021 10:36 am	Shipped	Complete Void

Figure 9: Complete Sales Delivery

Selecting the “Complete” button will open an action window where the sales delivery can be finalized by selecting the green Complete Sales Delivery button as shown in **Figure 10**.

Complete Delivery

Employee ID	X23421	Vehicle Make	Ford
Driver's Name	Joe Smith	Vehicle Model	E350
Driver's Lic. No.	S5653234	License Plate	WL43TC
Phone No. for Questions	1234567890	Actual Arrival	09/15/2021 today
Payment Type For Delivery	Electronic		12 : 18 PM

Package # 1	ABCDEF012345670000013802	Quantity	7	g	<input type="checkbox"/> Reject Package
Item	M00000000002: Buds - Blue Dre:				

Complete Sales Delivery Cancel

Figure 10: Complete Sales Delivery Action Window

If the sales delivery was unable to be completed, the "Reject Package" checkbox should be used, a return reason should be selected from the Return Reason dropdown, and additional details provided in the Optional Note text box. Finally, the rejected delivery should be completed by clicking on "Complete Sales Delivery." (Figure 11).

Complete Delivery

Employee ID	X23421	Vehicle Make	Ford
Driver's Name	Joe Smith	Vehicle Model	E350
Driver's Lic. No.	S5653234	License Plate	WL43TC
Phone No. for Questions	1234567890	Actual Arrival	09/15/2021 today
Payment Type For Delivery	Electronic		12 : 18 PM
		Est. Return Departure	today
			12 : 34 PM
		Est. Return Arrival	today
			12 : 34 PM

Package # 1 ABCDEF012345670000013802 Reject Package

Item M00000000002: Buds - Blue Dre: Verification 7 Grams

Return Reason Undeliverable

Optional Note No answer at the door

Figure 11: Rejected Sales Delivery Action Window

Once completed, the delivery will be finalized and automatically moved to the "Inactive" tab in the Sales Deliveries grid. All package contents are then returned to the original source package and are reflected in the package history as a return.

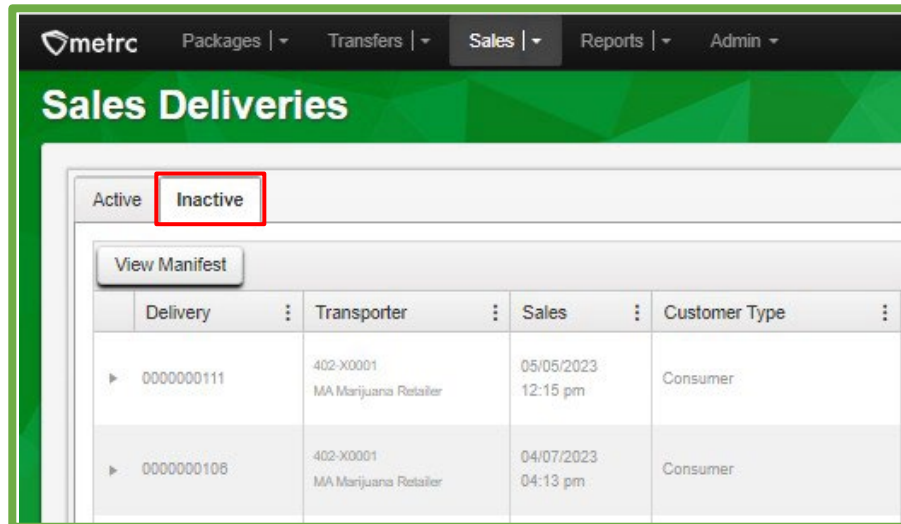


Figure 12: Inactive Deliveries tab

Metrc Resources

Additional resources are available in Metrc in the Support dropdown located in the upper right corner of the navigational toolbar and can be utilized to access the Metrc Manual/User Guide, the State Supplemental Guide, and other helpful information.

In addition, on-demand training is available in [Metrc Learn](#), an interactive learning management system, and the [Metrc Knowledge Center](#), a portal that provides on-demand access to various resource materials, including past bulletins and other helpful links.

If you have questions regarding information included in this bulletin, please contact Metrc Support at 877-566-6506 or support@metrc.com and provide your license # and Metrc username to aid in the inquiry process.