Metrc Support Bulletin

Bulletin Number: CO_IB_06.30.21	**Distribution Date**: 7/6/21	**Effective Date**: 7/6/21
Contact Point: Metrc® Support	**Subject**: New Features in Metrc	
Reason: Metrc is providing an update on our upcoming feature release.		

Greetings Metrc Users,

Metrc is pleased to provide information on our newest enhancements within the software. These enhancements, fixes, or document updates include:

    I.   Ability to manage saved drivers and vehicles under the Admin Menu
    II.   The new Production Management report available for cultivators
    III.   Source Package field for the Package Inventory report
    IV.   Ability for shippers to edit packages and destinations on a manifest that has been picked up by a transporter
    V.   Optional County field can be recorded on Sales Deliveries
    VI.   Fixed CSV Exports in Canned Reports
    VII.   Fixed Package History on Sales Delivery Drilldown
    VIII. Updated CSV Formatting Guidelines
            a. Sales (new) and Sales (update) Format Changes
    IX.   Updated Metrc General Manual
    X.   Updated State Supplemental Manual

Please find on the following pages a detailed description of the enhancements:

Manage Drivers and Vehicles

There is now the ability to manage the saved drivers and vehicle information under their admin menu. These saved drivers and vehicles can be used to populate those fields when creating transfer manifests.

To navigate to this screen, select the Transporter option under the Admin menu. This step is shown below in **Figure 1**.
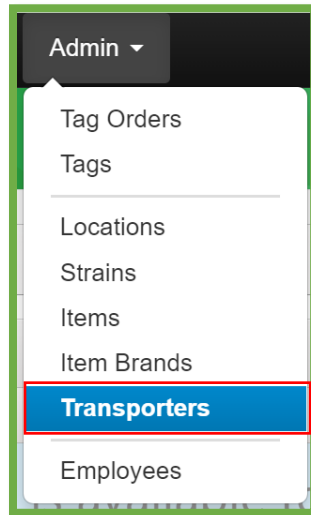

Figure 1: Admin Menu with Transporter Option

Please Note: If you do not see this option, you will need to be granted the permission under the employee admin menu.

Once on the Transporter screen, navigate to either the driver or vehicle tab and use the button to create the entry. This step is shown below in **Figure 2**.
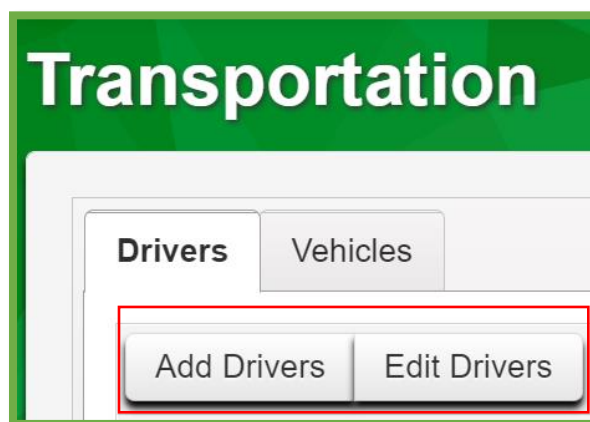
Figure 2: Add Driver Button

This button will trigger the action window to enter the driver's information. This step is shown for drivers below in **Figure 3.**
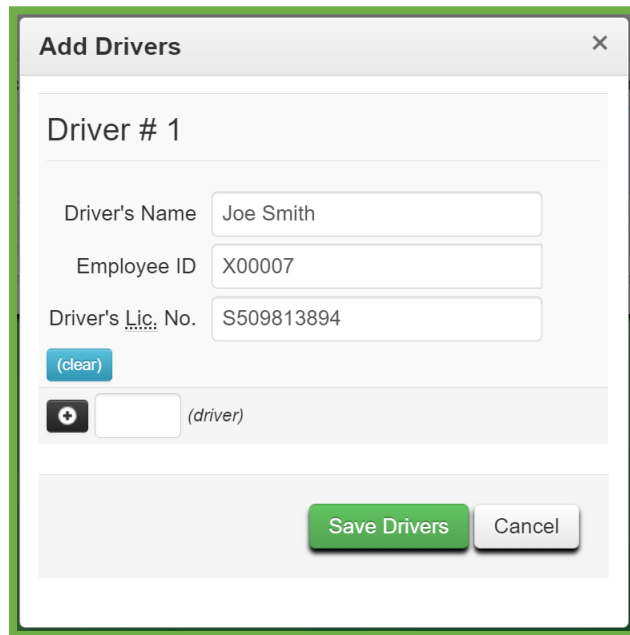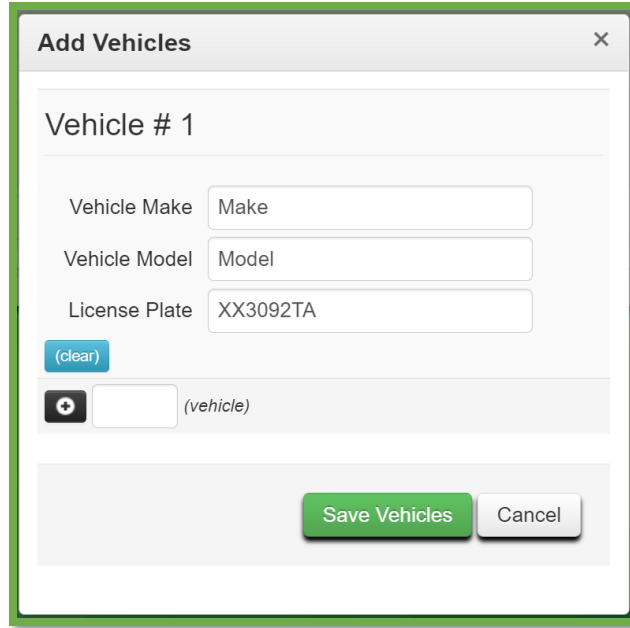

Figure 3: Add Driver Action Window

Once the information is entered, save the driver to be used when creating transport manifests.

To save vehicle information, this process is repeated under the Vehicle tab. This process is shown below in **Figure 4** and **Figure 5**.

Figure 4: Add and Edit Vehicle Buttons

Figure 5: Add Vehicle Action Window

Similarly, to how other Admin related items, there is the ability to edit or discontinue Drivers and/or Vehicles within their Transportation Grid as you shown in **Figure 6**.

Once a Driver or Vehicle has been created in the Transportation Grid, it can be used via the Lookup function on Transfer Manifests. If a Driver or Vehicle has been used for a New Manifest, editing the Driver or Vehicle details within the Transportation Grid **will not update the already created manifest**.


Figure 6: Transportation Grid

Production Management Report

Cultivation licenses will now be able to run an advanced report that will provide the following data points over a given data range (no longer than 180 days):

- Max Plants – *Maximum Number of Plants During Time Period*
- Average Plants – *Average Number of Plants in Veg/Flowering During Time Period*
- Percentage of Max Plants – *Average Number of Plants During Time Period Divided by Max Plants*
- Harvested Weight Packaged – *Total Weight Packaged from Harvest During Time Period*
- Harvested Weight Transferred – *Total Weight Transferred during Time Period*
- Percentage of Harvested Weight Transferred – *Total Weight Transferred Divided by Total Weight Packaged from Transfer During Time Period*

Please Note: This is intended to be an additional report to give visibility into production metrics, as well as to gauge eligibility for a Plant Count Waiver Request. This report is optional and not required to be generated or used for any specific purpose by rule.

To navigate to the Production Management Report screen, select the option under the Reports area. This step is shown below in **Figure 6**.
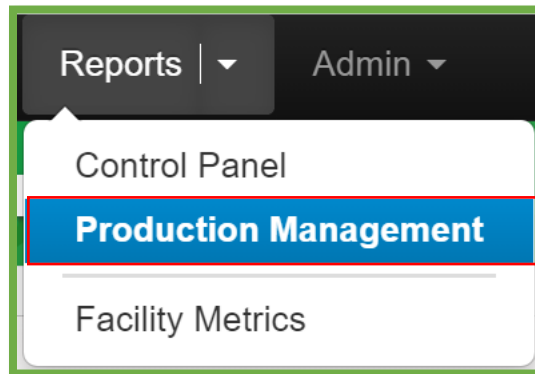
**Figure 7: Navigate to the Production Management Report**

Once on the Production Management Report screen, select the Pending tab and use the "Request Report" button to initiate the process. This step is shown below in **Figure 7**.
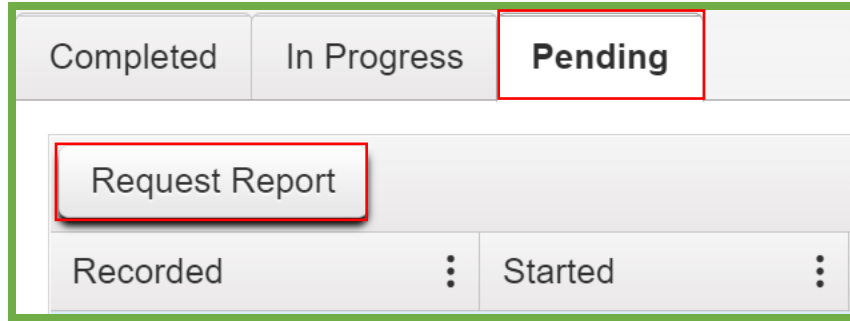
Figure 8: Pending Report Tab and Request Report Button

This button will initiate an action window to select the date range of the report. This step is shown in **Figure 8** below.

Note: The date range must be less than 180 days or the report will not run.
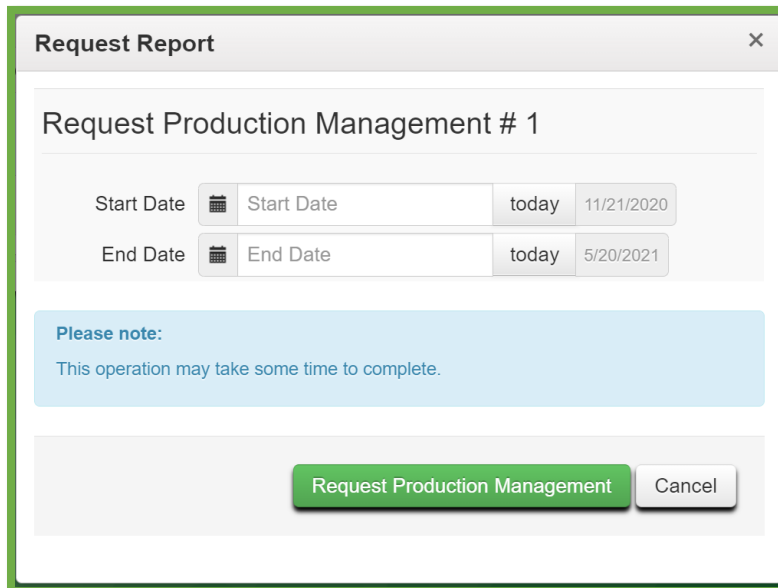
Figure 9: Request Production Report Action Window

The request will remain under the Pending tab until it is moved to the In Progress Tab. Once completed all the information will be made available under the Complete tab. This step is shown in **Figure 9** below.
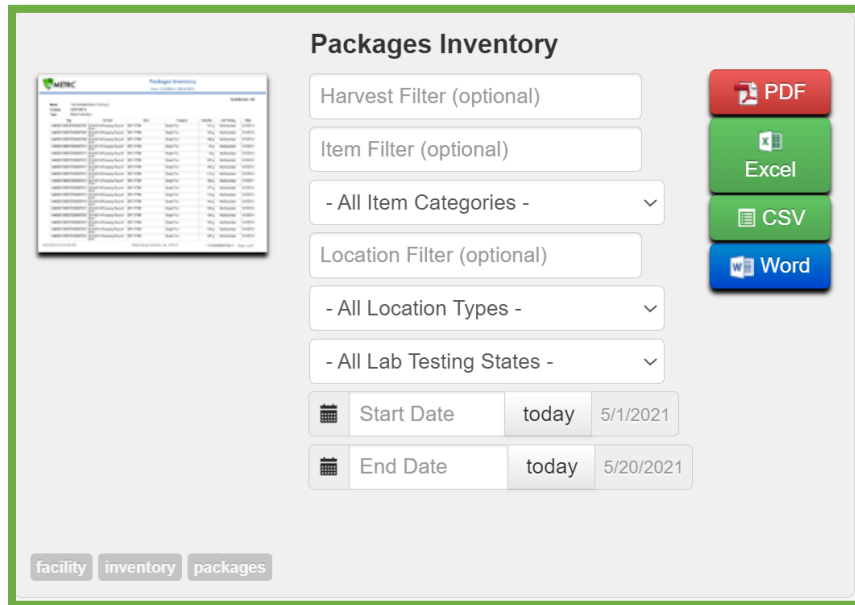
Figure 10: Production Management Report Complete Tab

Packages Inventory Report Update

The packages inventory report now has an additional "Source Package" field. To run the report, navigate to the Control Panel screen under the Reports menu. Once there, run the Packages Inventory report. This report is shown below in **Figure 11**.

Figure 11: Run Packages Inventory Report

Once run, the source package field can be seen which will indicate the source of the package included in the report as shown below in **Figure 12**.
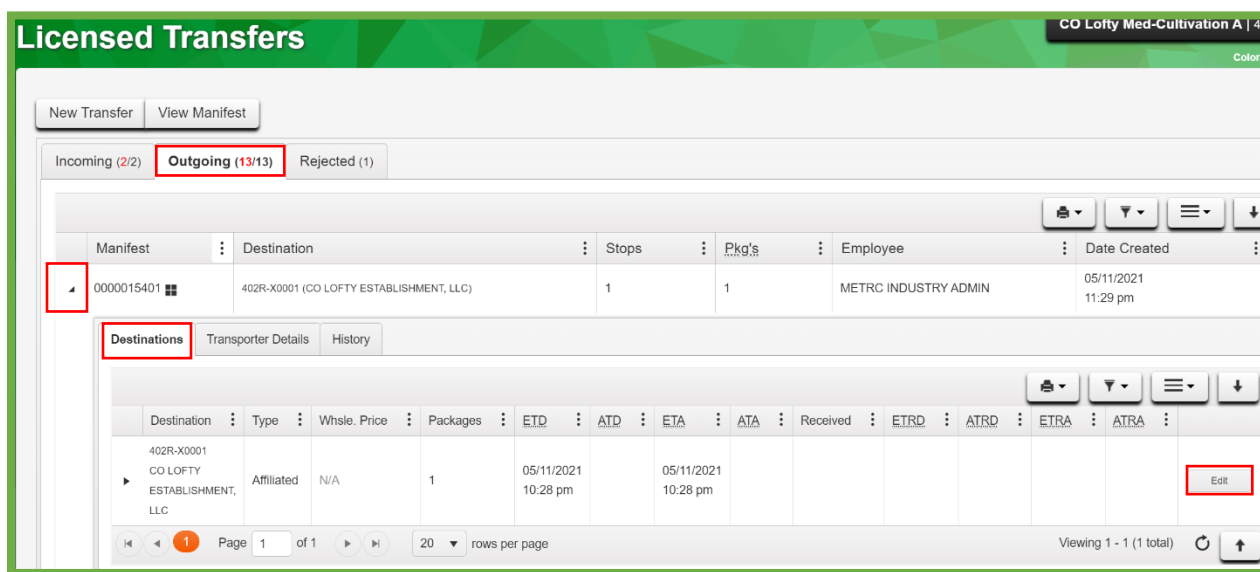
Package	Harvest	Source Packages
ABCDEF012345670000013908	GA 4.15.21	ABCDEF012345670000013904
ABCDEF012345670000013907	Blue Dream 6.22.20	ABCDEF012345670000013872

Figure 12: Source Package Field

Edit Transfer Manifests After Transporter Acceptance

There is now the ability to edit the packages and destinations of transfers after they have been accepted by Transporter licenses for correction purposes.

To do this, navigate to outgoing transfers screen and drill down on the transfer requiring edits. Once the drill down arrow is utilized, select the Destination tab and use the "Edit" button. This step is shown in **Figure 12** below.

Figure 13: Edit Outgoing Transfer

The edit button will trigger an action window, to edit the destination and package information for the transfer. Once the edits are complete, save transfer button to complete the process. This step is shown below in **Figure 13**.
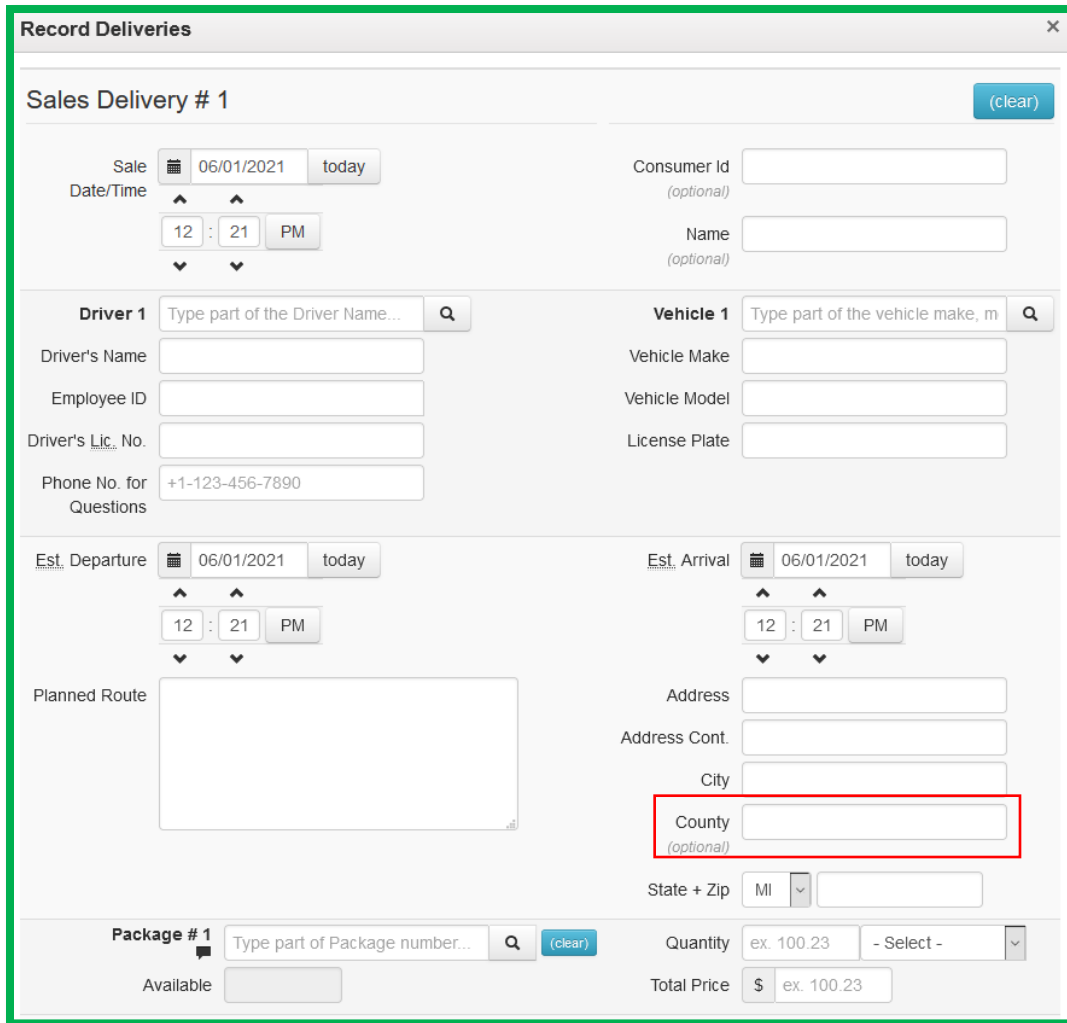
Figure 14: Edit Transfer Action Window

County Field in Sales Deliveries

Users with permissions to the Sales Deliveries in Metrc will see a new optional filed to denote the "County" for where the sales delivery is being delivered as seen in **Figure 14**. While this field is optional, this functionality will allow licensees to accurately track and trace routes for business planning purposes by understanding delivery trends.

Figure 15: Record Sales Delivery

CSV Guidelines Update

The CSV Formatting Guide has been updated and can be found within the Support Dropdown as seen in **Figure 16**. Updates to this guide include changes going into effect for the Sales Import requirements.

A new column as "Identification Method" will now need to be included in both the Sales (new) and (update) files. An Identification Method is a free form field for users to indicate how they identified the individual making a purchase. At this time, unless the Identification Method is already required for sales receipts, it will not be enabled within this release and additional information would be provided in a future bulletin.

The order of the columns for the CSV Sales (new) import are as follows:

1. Sale Date/Time
2. Customer Type
3. Patient License Number
4. Caregiver License Number
5. Identification Method
6. Package Label
7. Quantity
8. Unit of Measure
9. Total Amount

The order of the columns for the CSV Sales (update) import are as follows:

1. Sales Receipt No.
2. Sales Date/Time
3. Sales Customer Type
4. Patient License Number
5. Caregiver License Number
6. Identification Method
7. Package Label
8. Quantity
9. Unit of Measure
10. Total Amount

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.