



# Oklahoma State Supplemental Guide

A supplemental guide to the Metrc manual Rev 11.1

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## Opening Process

- An owner or designated manager must take the New Business training webinar.
- The business owner must send an e-mail to [support@metrc.com](mailto:support@metrc.com) requesting log-in credentials after the completion of the New Business training webinar.
- Receive e-mail that contains your log-in link and a temporary password that will allow you to access Metrc. The First-Time Login Key expires in 24 hours.
- Review Initial Account Setup on page 15 for the best process steps for setting up your Metrc account and ordering tags.

# First-Time Credentialing

When at least one business owner or designated manager completes the New Business training course, the business owner must send an e-mail to support@metrc.com requesting log-in credentials. The e-mail MUST contain the following:

Subject Line: "Requesting OK Credentials"

In the body of the email, please include:

Full Name

State Assigned badge/permit number if applicable.

Business License Number

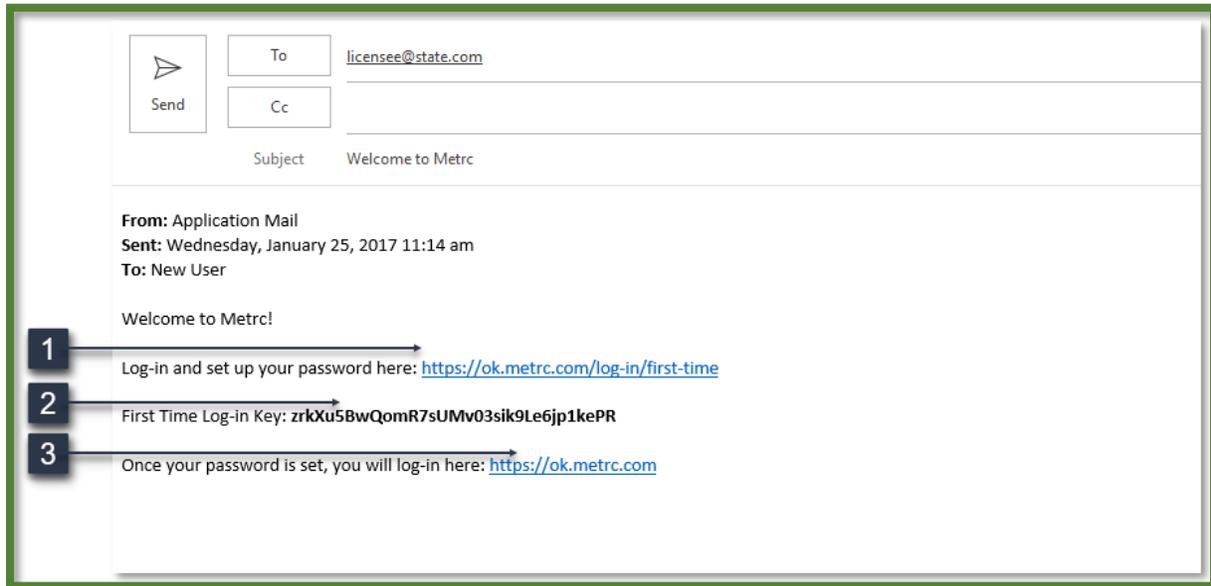
The name of your business and DBA if applicable.

The best phone number where you can be reached.

The email address where you would like your "Welcome to Metrc" email to be sent.

Metrc will verify credentials and training information and credential the Key Administrator within 3 business days.

Once information has been vetted a "Welcome to Metrc" email will be sent to the applicant.



**This link expires in 24 hours!**

This email contains your Log-in Link and temporary password to access Metrc and set up your account. The First-Time Log-in Key is good for 24 hours; **you must log in within 24 hours of when the link was sent!**

**Item 1: Login Link**

<https://ok.metrc.com/log-in/first-time>

This link will take you to the first-time log-in page where you can use your key and temporary password to log in.

**Item 2: First Time Log-in Key**

This first-time log-in key can only be used once, and within 24 hours of when the “Welcome to Metrc” email is sent.

**Item 3: Site Link**

<https://ok.metrc.com>

Use this link to navigate to the main log-in screen and create a bookmark on your device.

# User Profile

The screenshot shows a 'User Profile' form with two main sections: 'Contact Info.' and 'Security Info.'. Below these is an 'Account Recovery' section. The form contains the following fields and buttons:

- Contact Info.:**
  - Full Name: METRC INDUSTRY ADMIN (Callout 1)
  - E-mail: support@metrc.com (Callout 2)
  - Phone Number: +1-123-456-7890 (Callout 3)
- Security Info.:**
  - Username: X00420 (Callout 4)
  - Password: (Callout 5)
  - Confirm Password: (Callout 6)
- Account Recovery:**
  - Security Question: (Callout 7)
  - Security Answer: (Callout 8)
  - View Security Answer
- Buttons:**
  - Save Profile (Callout 9)
  - Undo Changes (Callout 10)

Once you click on the green Login button from the first-time login screen, you will be directed to your **User Profile** to complete your contact and security information.

Complete the missing information.

## Item 1: Full Name

Your full name is prepopulated from the State's database.

## Item 2: Email

You will enter and can change your email in this section.

## Item 3: Phone Number

You will enter and can change your phone number in this section.

## Item 4: Username

Your username will be prepopulated here.

## Item 5: Password

You will enter and can change your password in this section. Your password **MUST** contain at least:

1 upper case letter, 1 lower case letter, 1 number, and 1 special character

## Item 6: Confirm Password

Confirm your chosen password by retyping it in this section.

**Item 7: Security Question**

Enter a security question to use when resetting your password in the event you forget it and are unable to log in to the system.

**Item 8: Security Answer**

Enter the answer to your chosen security question.

**Item 9: Save Profile button**

Use this button to save all entered information or changes to information.

**Item 10: Undo Changes button**

This button will clear the fields you populate so that you can begin again if there were errors.

Once you have completed the information and hit the **Save Profile** button, you will have successfully created the login credentials you will use to access the system.

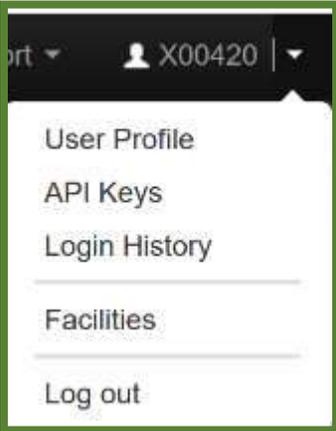
# Adding Additional Facilities to Metrc

The following guidance outlines the steps necessary for a business to input additional facilities to the Metrc system. This can only be completed by the Administrator of the existing license.

**Step 1:** Navigate to the upper right-hand corner of your Metrc account and select the dropdown next to your username.



**Step 2:** Once the dropdown populates, select the “Facilities” option.



**Step 3:** Select the “Add Facilities” button.



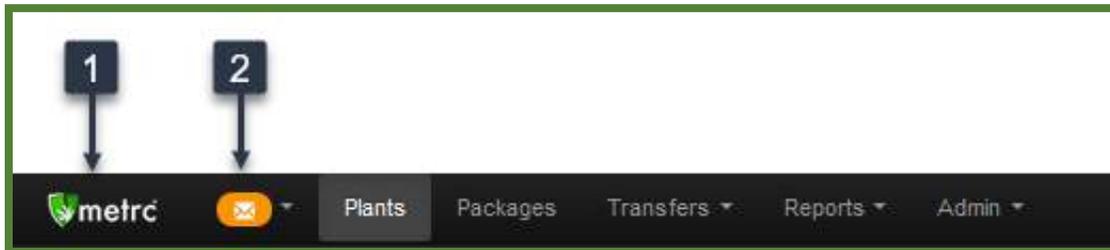
**Step 4:** The “Add Facilities” action window will appear. Here, you will input the facility license number associated with your business. You will also need to designate the homepage for that license number and the type of employment. Once this information is accurately inputted, select “Add Facilities.”

The screenshot shows a window titled "Add Facilities" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Facility # 1" with a "(clear)" button to its right. Underneath, there are two input fields: "Facility Lic. No." containing the text "AU-G-A-XXXXX" and "Home" with a dropdown menu showing "Admin". Below these fields, there is an "Employment" section with two checkboxes: "Owner at this Facility" (checked) and "Manager at this Facility" (unchecked). At the bottom left of the form area, there is a blue button with a "+" sign. At the bottom center, there are two buttons: "Add Facilities" (green) and "Cancel" (grey).

## Navigating in Metrc

Once you are in the software, you will notice a long black navigation bar at the top of the screen. The functions available to you on the navigation bar are based on facility type and employee permissions.

### Navigation Bar



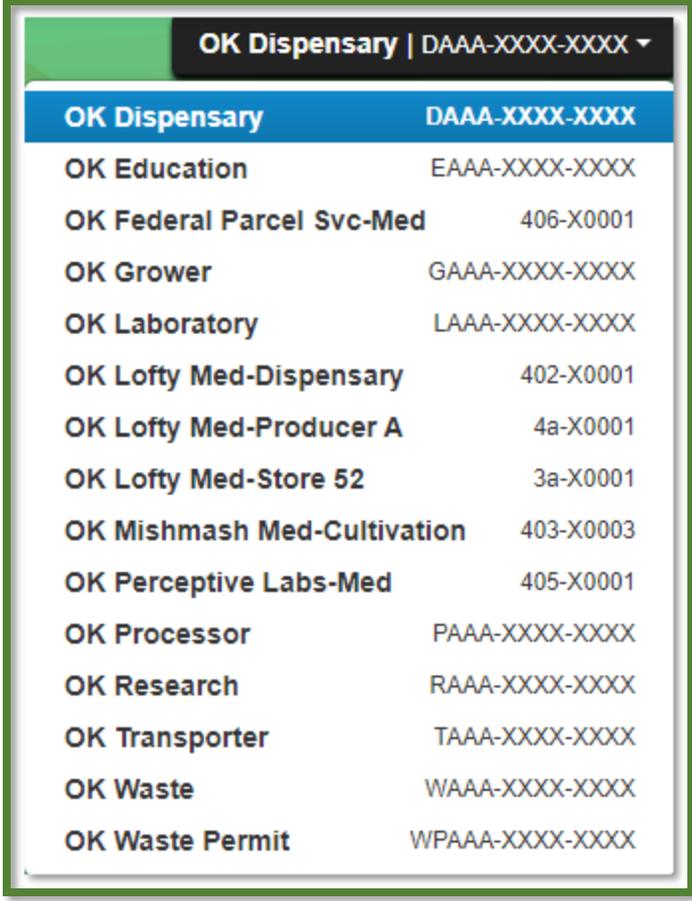
#### Item 1: Metrc Navigation Bar

The Metrc Navigation Bar is the long black bar that runs from left to right at the top of your screen when you are logged into Metrc. You will select from the functional areas on this bar to conduct your data entry.

#### Item 2: Information Envelope

The Information Envelope on the far left of the navigation bar will display Metrc Support holiday hours and/or closures, the number of expiring or expired Patients registered at a Dispensary, and other important information.

## Working In/Switching Between Facilities



OK Dispensary	DAAA-XXXX-XXXX
OK Education	EAAA-XXXX-XXXX
OK Federal Parcel Svc-Med	406-X0001
OK Grower	GAAA-XXXX-XXXX
OK Laboratory	LAAA-XXXX-XXXX
OK Lofty Med-Dispensary	402-X0001
OK Lofty Med-Producer A	4a-X0001
OK Lofty Med-Store 52	3a-X0001
OK Mishmash Med-Cultivation	403-X0003
OK Perceptive Labs-Med	405-X0001
OK Processor	PAAA-XXXX-XXXX
OK Research	RAAA-XXXX-XXXX
OK Transporter	TAAA-XXXX-XXXX
OK Waste	WAAA-XXXX-XXXX
OK Waste Permit	WPAAA-XXXX-XXXX

In the upper right-hand corner of the screen, under the long black navigation bar, will be your facility/location.

### Item 1: Current Facility

This is the facility in which you are currently working.

If your organization only has one facility, or if you are an employee who will only have access to one facility, that facility/location information is what you will see here.

### Item 2: Drill Down Arrow

If your organization has multiple facilities and you have access to more than one of them, a Drill Down Arrow will be available to the right of the facility information. You will click on this to populate the list of facilities to which you have access.

### Item 3: Other Available Facilities

Once the list has populated, you can toggle between facilities by clicking on the facility you need to access. The selected facility will then appear as the current facility

# Licenses & Functionality

	Cultivation	Processor	Dispensary	Transporter	Laboratory	Education Facility	Research Facility	Waste Disposal Facility	Waste Disposal Permit
Plants	✓					✓	✓		
Packages	✓	✓	✓	✓	✓	✓	✓	✓	✓
Transfers	✓	✓	✓	✓	✓	✓	✓	✓	✓
Sales			✓						
Patients*			✓						
Admin	✓	✓	✓	✓	✓	✓	✓	✓	✓
Reports	✓	✓	✓	✓	✓	✓	✓	✓	✓
Financials	✓	✓	✓	✓	✓	✓	✓	✓	✓
Search	✓	✓	✓	✓	✓	✓	✓	✓	✓

## Cultivation Facility

Functions available on the navigation bar for Cultivations/Grows include: Plants, Packages, Transfers, Admin, Reports, Financials, and Search.

## Laboratory Facility

Functions available on the navigation bar for Laboratories include: Packages, Transfers, Admin, Reports, Financials, and Search.

## Dispensary Facility

Functions available on the navigation bar for Dispensaries include: Packages, Transfers, Sales, Patients, Admin, Reports, Financials, and Search.

## Processor Facility

Functions available on the navigation bar for Processor Facilities include: Packages, Transfers, Admin, Reports, Financials, and Search.

## Transporter Facility

Functions available on the navigation bar for Transporter Facilities include: Packages, Transfers, Admin, Reports, Financials, and Search.

## Education Facility

Functions available on the navigation bar for Education Facilities include: Plants, Packages, Transfers, Admin, Reports, Financials, and Search.

## Research Facility

Functions available on the navigation bar for Research Facilities include: Plants, Packages, Transfers, Admin, Reports, Financials, and Search.

## Waste Disposal Facility

Functions available on the navigation bar for Waste Disposal Facilities include: Packages, Transfers, Admin, Reports, Financials, and Search.

## **Waste Disposal Permit**

Functions available on the navigation bar for Waste Disposal Permit include: Packages, Transfers, Admin, Reports, Financials, and Search.

Key Administrators automatically have access to all functions for their license type(s). They will assign specific permissions to employees as they are added to the account. If an employee does not have permissions to certain functionality, that function will not appear on their navigation bar. The Key Administrator must add in all owners with full permissions.

## Initial Account Setup

Below are the best process steps for setting up your Metrc account:

1. Receive Metrc Administrator credentials (see First-Time Credentialing in this guide)
2. Add Facilities/Locations (under the owner's profile area to the far right of the navigation bar)
3. Select Facility/Location
4. Under Admin on the navigation bar:
  - Place your Tag Order (Starting 3/29/2021)
    - Tags must be ordered from each individual license.
    - When tags arrive, "Receive" tags digitally in Metrc from the Tag Orders screen.
  - Add Locations (as applicable)
    - If the Locations functionality is available for your facility under Admin, populate "Locations" to describe how your organization has product laid out on site. Locations may be added to multiple facilities at once if you plan to have those facilities laid out the same way.
  - Add Strains
    - Strains may be added to multiple facilities at once across license types.
  - Add Items
    - Items must be entered in each individual license.
  - Add Employees
    - Add all employees who will be working on site to the employees list in Metrc.

When your tags arrive, receive tags digitally in Metrc from the Tag Orders screen, then begin entering plants and/or packages information to track your product in Metrc.

# Tag Orders

The screenshot shows a 'New Tag Order' form with the following sections and callouts:

- Order Details:**
  - 1:** Facility License (CO LOFTY ESTABLISHMENT, LLC 403-X0002)
  - 2:** Physical Address (1697 Cole Blvd, Suite 200, Lakewood, CO 80401)
  - 3:** Plant and Package sections, each with a 'Count' field and a price of \$0.00.
  - Subtotal:** \$0.00
- Shipping Details:**
  - 4:** Contact Name (METRC INDUSTRY ADMIN), Phone No. (+1-800-420-MAIN), Copy from (Facility), Ship Address, Address Cont., City, and State + Zip (AL).
  - Shipping/Handling, Taxes, and Total Amount fields are present but empty.
- Payment methods:**
  - Credit card (with VISA, MasterCard, and American Express logos)
  - Check or Money Order
- Please note:** A blue box containing instructions: 'You MUST place separate Tag Orders for each Facility. Plant and Package Tags are programmed for each of your Facilities individually and are placed within your Metro account automatically once received. Make sure that you are in the correct Facility within Metro when you place the order. Tag Orders are not transferrable between Facilities. All Tag Orders are final, so we recommend that you place your orders carefully.'
- 5:** Place Order button
- 6:** Cancel button

While ordering tags in Metrc is a straightforward process, it is important to pay close attention and check your information before placing an order. Once a tag order has been submitted, in most cases it can only be canceled before 7 pm Central Time on the day the order was placed. Tags are custom printed for each facility. As such, orders cannot be cancelled once the printing process has begun and are non-refundable/non-returnable. Pay close attention to the facility you are placing the order from/for, the quantity of tags, and type of tags being ordered. Always double-check your information before hitting the Place Order button.

## Item 1: Facility License #

Facility License # will be auto-populated based on the facility in which you are currently working.

## Item 2: Physical Address

The Physical Address of the facility is auto-populated with the facility address on file with the State.

## Item 3: Plant and/or Package Tag Amount

Enter the number of Plant Tags you would like to order (Plant Growing Facilities only) and/or the number of Package Tags you would like to order.

#### **Item 4: Shipping Details**

Enter your preferred shipping address. \*Must be a physical address, CANNOT be a PO Box.

#### **Item 5: Place Order button**

Click the Place Order button, after you have verified your information is correct to submit the order.

#### **Item 6: Cancel button**

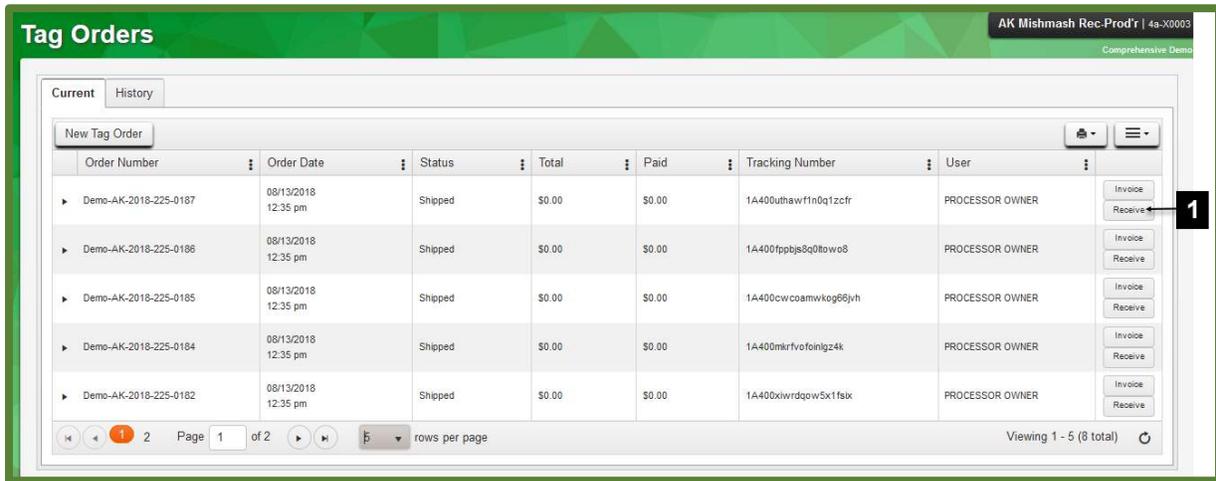
Click this button to exit the screen without saving any data.

#### **Additional notes:**

- To navigate to the Tag Order area, select the Admin function on the navigation bar and click on Tag Orders.
- Payment information is not required to be the licensee or the business owner.
- Tags can be sent to a physical location of your choosing. Tags cannot be sent to a PO Box.
- Tags will be sent by UPS ground.
- Tag costs are \$.45 per plant tag & strap and \$.25 per package tag.
- All tag orders are printed and shipped the next business day after the order has been placed.
- Expedited shipping is available, including UPS Next Day Air or 2<sup>nd</sup> Day Air. To request expedited shipping, call the Metrc Support Desk immediately after placing your tag order. The licensee requesting expedited shipping will be responsible for the greater cost of expedited shipping. Please remember with expedited shipping that tags never print the day of the order, they print the following business day.
- Users may opt to send a Check or Money Order as payment. If this option is selected, the address to send payment will populate. Please note: if you are paying by check or money order, your tag orders will not be printed or shipped until payment has been received and cleared by the bank.

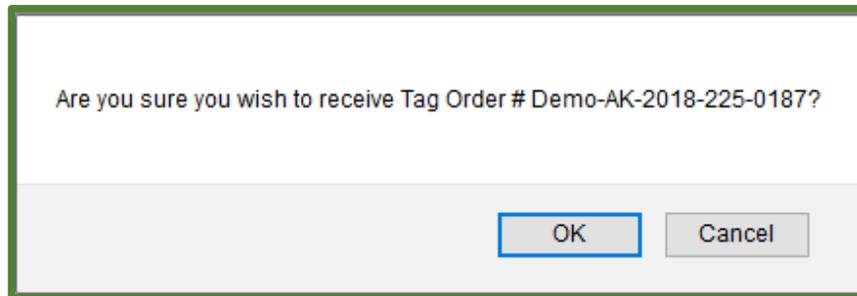
# Receiving your Tags into Metrc

As a security feature to ensure physical tags are not diverted before they reach you or used by anyone other than the licensee who ordered them, your tags will not automatically populate in the system as the order is placed. Once your tag order has shipped, a “Receive” button will populate in the Tag Orders area of the system as displayed below. When your tags arrive, select the “Receive” button for the order to populate the tags in the software.



## Item 1: Receive button

Select this button once your tags have physically arrived. After selecting the receive button, a confirmation window like the one displayed below will appear prompting you to confirm receipt of your tag order.



# Locations

The Locations area is located under the Admin functionality on the navigation bar. This where locations can be added or edited, as needed. The “x” button to the far right of the location name can be used to discontinue the location for that facility.

Locations should be added for immature batches, plants, harvests, and packages.

Location	Location Type	Plant Batches	Plants	Harvests	Packages	
Meta Office	default	Yes	Yes	Yes	Yes	X
Shelle's Baby Bath	default	Yes	Yes	Yes	Yes	X
Shelle's Flower Room	default	Yes	Yes	Yes	Yes	X
Shelle's Harvest Hut	default	Yes	Yes	Yes	Yes	X
Shelle's Inventory Stock Room	default	Yes	Yes	Yes	Yes	X
Shelle's Test Room	default	Yes	Yes	Yes	Yes	X
Shelle's Veg Center	default	Yes	Yes	Yes	Yes	X

Page 1 of 1 | 20 rows per page | Viewing 1-7 (7 total)

# Adding Locations

The screenshot shows a dialog box titled "Add Locations" with a close button (X) in the top right corner. The dialog is for "Location # 1" and includes a "clear" button. It features a "Name" text input field (callout 1) and a "Location Type" dropdown menu (callout 2). A list of facilities is shown on the right, each with a checkbox. The first facility, "OK Dispensary | DAAA-XXXX-XXXX", is checked. At the bottom left, there is a "+" button (callout 3) and a text input field containing the number "1". At the bottom center, there are "Create Locations" (callout 5) and "Cancel" (callout 6) buttons. At the bottom right, there are "Check all" and "Check none" buttons. Callout 4 points to the facility list, and callout 7 points to the "clear" button.

## Item 1: Name

The location name is entered here.

## Item 2: Location Type

Use this dropdown to select where the location will be used.

## Item 3: Add Button

This button is used to add multiple locations to the same facility or facilities.

## Item 4: Facilities

The facility that you are logged into will automatically be checked. Any additional facilities that this location should be added to can be checked as well to add the location to all facilities at once. The "Check All" and "Check None" buttons can be used to quickly select all or none of the additional facilities.

## Item 5: Create Locations

Use this button to save the changes and create the location.

## Item 6: Cancel Button

Use this button to save the changes and create the location.

## Item 7: Clear Button

This button is used to clear all entered data without saving.

## Editing Locations

The screenshot shows a dialog box titled "Edit Locations" with a close button (X) in the top right corner. The dialog contains the following elements:

- Item 1:** A text input field labeled "Location" with the placeholder text "Type part of the Location name..." and a search icon (Q) on the right.
- Item 2:** A text input field labeled "Name".
- Item 3:** A dropdown menu labeled "Location Type" with the text "- Select -" and a downward arrow.
- Item 4:** A blue button with a plus sign (+) and a text input field containing the number "1".
- Item 5:** A green button labeled "Save Locations".
- Item 6:** A grey button labeled "Cancel".
- Item 7:** A blue button labeled "(clear)".

### Item 1: Location

Use this area to select the existing location that needs to be edited.

### Item 2: Name

Input the new name for the location in this box.

### Item 3: Location Type

Use this dropdown to select where the location will be used.

### Item 4: Add Button

This button is used to edit multiple locations at one time.

### Item 5: Save Locations

Use this button to save the changes to the location.

### Item 6: Cancel

Use this button to cancel and exit without saving any data.

### Item 7: Clear Button

This button is used to clear all entered data without saving.

# Strains

The Strains area is located under the Admin functionality on the navigation bar. This is where strains can be added or edited, as needed. The “x” button to the far right of the strain name can be used to discontinue the strain for that facility. If the “Used” column has a “Yes” for that strain, the strain cannot be edited.

The screenshot shows a web interface for managing strains. At the top, there are buttons for 'Add Strains' and 'Edit Strains'. Below is a table with the following columns: Strain, Testing, THC, CBD, Genetics, and Used. The table contains three rows of data. At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and '20 rows per page'. On the right side of the table, there are icons for adding, deleting, and editing, along with a 'Viewing 1 - 3 (3 total)' indicator.

Strain	Testing	THC	CBD	Genetics	Used	
Blue Dream	ThirdParty	22	10		Yes	X
Shelle - GG44	None				Yes	X
Yellow Orange	None				Yes	X

# Adding Strains

The screenshot shows a web form titled "Add Strains" with the following elements:

- 1**: Name input field.
- 2**: Testing Status dropdown menu.
- 3**: THC<sup>1</sup> input field.
- 4**: Indica and Sativa sliders.
- 5**: "+" button and a quantity input field (showing "1").
- 6**: "Create Strains" button.
- 7**: "Cancel" button.
- 8**: List of checkboxes for various categories (e.g., OK Dispensary, OK Education, etc.).
- 9**: "(clear)" button.

Below the form, there is a blue informational box:

Please report THC potency as a percentage of the overall weight.  
This means that if a particular strain tested as having 15% THC potency, then every gram of dried flower of that strain has 0.15 grams of THC. The reality is that potency can drastically change even between a single plant or from plant to plant. So, the percentage that should be entered into metro® would be the average potency percentage from all tests in the prior two years. If no tests have been conducted please use your best estimate.

## Item 1: Strain Name

Enter each Strain you grow and/or carry at your facility.

## Item 2: Testing Status

An optional field in which you can define whether the product has been tested, and if so, if testing was performed in-house or by a third party.

## Item 3: THC and CBD Content

An optional field in which you can identify the THC and CBD content of the Strain.

## Item 4: Indica vs. Sativa

An optional field in which you can identify the Indica vs Sativa makeup of the Strain.

## Item 5: Add More Strains

Select this button to add multiple strains at once on this screen.

## Item 6: Create Strains button

Select this button to save the information and create the strain(s).

## Item 7: Cancel button

Select this button to exit the screen without saving any information.

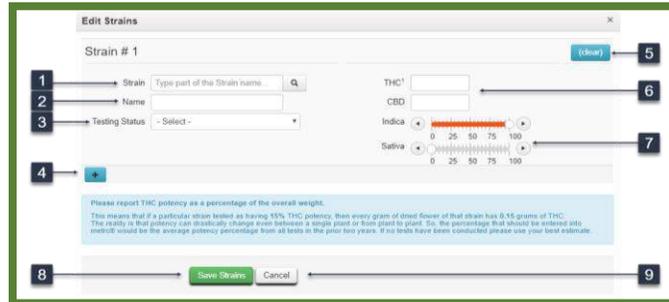
**Item 8: Additional Facilities**

If your organization has multiple facilities, you can add strains to one or more at the same time using the relevant checkmark boxes.

**Item 9: Clear button**

Use this button to clear all data entered without saving.

# Editing Strains



## Item 1: Strain

Use this area to select the strain that needs to be edited.

## Item 2: Name

Use this box to enter the new name for the selected strain.

## Item 3: Testing Status

An optional field in which you can define whether the product has been tested, and if so, if testing was performed in-house or by a third party.

## Item 4: Add Button

Select this button to add multiple strains at once on this screen.

## Item 5: Clear Button

This button is used to clear all entered data without saving.

## Item 6: THC and CBD Content

An optional field in which you can identify the THC and CBD content of the Strain.

## Item 7: Indica vs. Sativa

An optional field in which you can identify the Indica vs Sativa makeup of the Strain.

## Item 8: Save Strains

Select this button to save the information and create the strain(s).

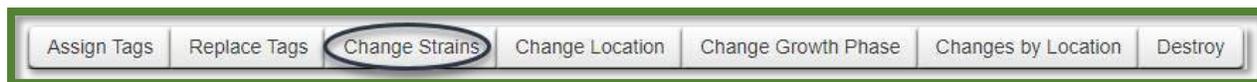
## Item 9: Cancel

Select this button to exit the screen without saving any information.

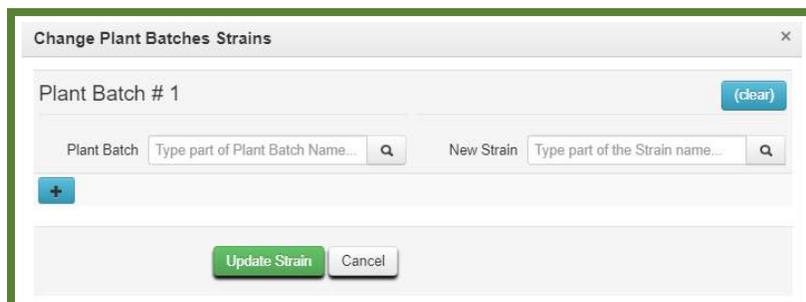
**\*\*Please note:** Once a strain has been used, the "Name" field will be restricted. If a name edit is attempted for a strain that has been used, an error will be received. However, other fields within the strain can still be modified.

## Changing Strains

If a user identifies that an incorrect strain was designated to an Immature Plant Batch or a Vegetative/Flowering Plant, they can select the “Change Strain” button to assign the correct strain.

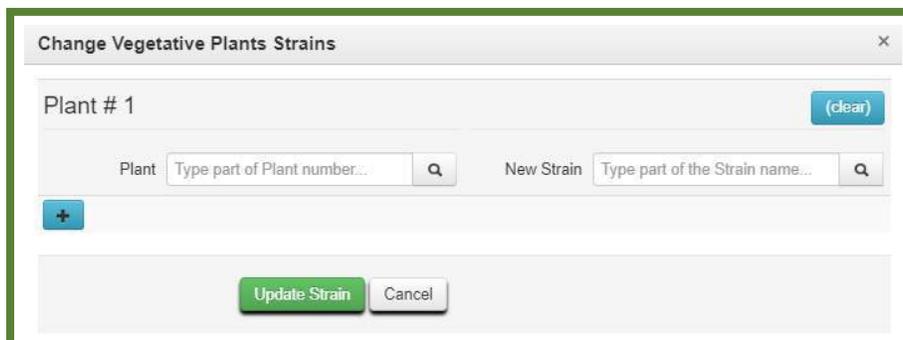


## Changing Plant Batch Strains

A dialog box titled "Change Plant Batches Strains" with a close button (x) in the top right. It contains a text input field for "Plant Batch # 1" with a "(clear)" button to its right. Below this are two search fields: "Plant Batch" with the placeholder "Type part of Plant Batch Name..." and "New Strain" with the placeholder "Type part of the Strain name...". Both search fields have a magnifying glass icon. A blue "+" button is located below the search fields. At the bottom of the dialog are two buttons: "Update Strain" (green) and "Cancel" (white).

For plant batches, the user will be able to update the strain for the plant batch that was identified as incorrect. The “New Strain” option will include the selectable list of active strains created within the license. If some plants within the immature batch have been transitioned to a new growth phase, they will not be updated by the immature batch strain change.

## Changing Vegetative/Flowering Plants Strains

A dialog box titled "Change Vegetative Plants Strains" with a close button (x) in the top right. It contains a text input field for "Plant # 1" with a "(clear)" button to its right. Below this are two search fields: "Plant" with the placeholder "Type part of Plant number..." and "New Strain" with the placeholder "Type part of the Strain name...". Both search fields have a magnifying glass icon. A blue "+" button is located below the search fields. At the bottom of the dialog are two buttons: "Update Strain" (green) and "Cancel" (white).

For Vegetative or Flowering Plants, the user will be able to select the plants that were identified as incorrect. The “New Strain” option will include the selectable list of active strains created within the license. If multiple plants are selected, a template will appear and can be used.

# Items

The Items area is located under the Admin functionality on the navigation bar. This is where items can be added or edited, as needed. The “x” button to the far right of the item name can be used to discontinue the item for that facility. If the “Used” column has a “Yes” for that item, the item cannot be edited.

Item	Category	Type	Quantity Type	Default LMS	UoM	Approval	Expiry Date	Brand	Strain	CBD%	CBD	CBD.D.	THC%	THC	THC.D.	Vol.	Wgt.	Qty.	# Doses	Used
Character Limit	Products for Oral Administration	Infused/EtOle	CountBased	NotSubmitted	Each	UnderReview	02/27/2020 01/04/20 pm	Lot Top Admin 00-101		1%	1 g		1%	1 g		1 g		110 mg		No
Lot Top Admin 00-170-10	Lotion/Cream for Topical Administration	Infused/NotEtOle	CountBased	NotSubmitted	Each	Rejected	12/31/2020 05/09/24 pm	Lot Top Admin 04-170			170 mg		50%	200 mg		0.5 ml		500 mg		No
M0000012401: Tier 1 Vap-Inhale 22 - 10 - 14-18	Tier 1 Plant Material for VapORIZATION	Buds	WeightBased	NotSubmitted	Grams	Approved	12/31/2020 05/09/24 pm	Tier 1 Vap-Inhale 22-10	Blue Dream	10%			22%				14.15 g			No
M0000012801: Oil for Oral Admin 11-0-10	Oil for Oral Administration	Infused/EtOle	CountBased	NotSubmitted	Fluid Ounces	Approved	12/31/2020 05/09/24 pm	Oil for Oral Admin 11-0			0.03 mg		70%	100 mg		2.1 oz		220 mg		No
M0000012901: Scott 3	Scotts Demo	Concentrate	WeightBased	NotSubmitted	Ounces	Approved	12/31/2020 05/09/24 pm				1 g			1 g				5 g		No
M0000013001: CBD Rich 1000mg CBD 90 mg THC	Domo Tincture for Oral Admin	Infused/NotEtOle	VolumeBased	NotSubmitted	Each	Approved	12/31/2020 05/09/24 pm				80 mg			1,000 mg		30 ml				No
M0000013901: Shellie - OG44 Bud	Bud Power/Buds	Buds	WeightBased	NotSubmitted	Grams	Approved	12/31/2020 05/09/24 pm		Shellie - OG44				17.01%							No
M0000014401: Budz Test	Bud Power/Buds	Buds	WeightBased	NotSubmitted	Grams	Approved	11/02/2019 04/21/17 pm		Yellow Orange											No
Oil for Oral Admin 11-0-10	Oil for Oral Administration	Infused/EtOle	CountBased	NotSubmitted	Each	Rejected	12/31/2020 05/09/24 pm	Oil for Oral Admin 11-0		1%	0.1 mg		40%	110 mg		0.3 ml		550 mg		No
Oil for Oral Admin 11-0-10 Example	Oil for Oral Administration	Infused/EtOle	CountBased	NotSubmitted	Each	RequiresUpdate	01/29/2020 04/11/21 pm	Oil for Oral Admin 11-0 Bud		1%	0.1 mg		40%	110 mg		0.3 ml		110 mg		No
Oil for Oral Admin 050-0-10	Oil for Oral Administration	Infused/EtOle	CountBased	NotSubmitted	Each	UnderReview	12/31/2020 05/09/24 pm	Oil for Oral Admin 11-0		0.1%	0.1 mg		70%	11 mg		0.3 ml		550 mg		No
Oil or Sol Vap 50-10-11E	Mixed Oil or Solid for VapORIZATION	Concentrate	CountBased	NotSubmitted	Miligrams	Ready	12/31/2020 05/09/24 pm	Oil or Sol Vap 50-10			10 mg		40%	5,000 mg				5,000 mg		No
Oil or Sol Vap 50-10-10	Mixed Oil or Solid for VapORIZATION	Concentrate	CountBased	NotSubmitted	Miligrams	UnderReview	12/31/2020 05/09/24 pm	Oil or Sol Vap 50-10		10%	10 mg		40%	50 mg				5,000 mg	5,000 mg	No
Scotts Demo	Scotts Demo	Concentrate	WeightBased	NotSubmitted	Ounces	Ready	12/31/2020 05/09/24 pm				1 g			11 oz				10 oz		No
THC Content Test	Capsule for Oral Administration	Infused/EtOle	CountBased	NotSubmitted	Each	Ready	01/12/2020 05/09/24 pm	Lot Top Admin 04-170			33 g			100 null				110 mg		No
Tier 1 Vap-Inhale 22 - 10 - 8-48	Tier 1 Plant Material for VapORIZATION	Buds	WeightBased	NotSubmitted	Grams	RequiresUpdate	01/31/2020 02/10/20 pm	Tier 1 Vap-Inhale 22-10	Blue Dream	10%			22%					8.49 g		No
Tier 2 Vap - Saliva 24 - 14 - 8-49	Tier 2 Plant Material for VapORIZATION	Buds	WeightBased	NotSubmitted	Grams	Ready	12/31/2020 05/09/24 pm	Tier 2 Vap - Saliva 24-14 - 8-49	Blue Dream	14%			24%					8.46 g		No
Walton Item Brand	Edible for Oral Administration	Infused/EtOle	CountBased	NotSubmitted	Each	Rejected	12/31/2020 05/09/24 pm	Walton Item Brand		44%	11 mg		50%	53 mg				110 mg		No

## Adding Items – Keep in Mind

**When adding Items into Metrc, please keep in mind:**

1. The “Item” name should identify the product that will be packaged and eventually distributed to Patients.
2. The Item name should not simply identify the Category; it should describe the specific item that will be packaged from a Harvest or Production Batch. The name for an item from any Strain Specific category should include the Strain Name (e.g. Buds - Blue Dream).
3. Items must be created for each individual facility.
4. As you create your Item, you will also identify the Category to which it belongs. Categories available in the dropdown menu are populated by the state. Categories facilitate the tracking of product in the system by like groups.
5. The facility packaging the product is responsible for naming the Item; the Item name is carried with the product through the distribution chain. It is unlikely that a Dispensary would ever change the name of an Item, even if/when repackaging product.
6. Once Items are created in the Items admin area, and approved by the state where necessary, they will be available in the Items dropdown menu as the facility creates packages.

**Categories are defined by the State and are listed in your account.**

## Adding Items – Breakdown

The screenshot shows a web form titled "Add Items" with a close button (X) in the top right. The form contains the following elements:

- Item # 1**: A label for the first item, with a "(clear)" button to its right (callout 4).
- 1**: Points to the "Name" text input field.
- 2**: Points to the "Category" dropdown menu, which currently shows "- Select -".
- 3**: Points to the "Unit of Measure" dropdown menu.
- 5**: Points to a blue "+" button.
- 6**: Points to the "Create Items" button.
- 7**: Points to the "Cancel" button.

Below the form, there is a light blue informational box with the following text:

Why is there no multi-Facility create such as that available in Employees, Strains, and Rooms?  
Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

### Item 1: Name

Type the Item Name, keeping in mind the naming requirements identified in the Categories discussion on the previous page and under Category below.

### Item 2: Category

Select the correct Category for the Item from the State-populated dropdown menu, keeping in mind the guidelines reiterated below. Certain Category selections may populate more data fields underneath Unit of Measure for you to complete

### Item 3: Unit of Measure

If an Item belongs to a weight-based Category, select the Unit of Measure for that Item. If the Item belongs to a count-based "each" Category, select "Each". Please ensure you have selected the correct Unit of Measure before creating the Item.

### Item 4: Clear button

Select this button to clear all entered data.

### Item 5: Add button

Select this button to create additional items while on this screen.

### Item 6: Create Item button

Select this button to save all entered data and create the Item in the system.

### Item 7: Cancel button

Select this button to exit the screen without saving any information.

# Editing Items

The screenshot shows a dialog box titled "Edit Items" with a close button (x) in the top right corner. Below the title bar, it says "Item # 1" followed by a blue "clear" button. The main area contains three input fields: "Item" with a search icon and placeholder text "Type part of the Item name...", "Name" with an empty text box, and "Category" with a dropdown menu showing "- Select -". To the right of the "Item" field is a "Unit of Measure" dropdown menu. Below these fields is a blue "+" button. At the bottom of the dialog are two buttons: "Save Items" (green) and "Cancel" (grey). Eight numbered callouts (1-8) point to these elements: 1 points to the "Item" field, 2 to the "Name" field, 3 to the "Category" dropdown, 4 to the "+" button, 5 to the "clear" button, 6 to the "Unit of Measure" dropdown, 7 to the "Save Items" button, and 8 to the "Cancel" button.

## Item 1: Item

Select the item name that needs to be edited.

## Item 2: Name

Use this field to input the new name for the selected item.

## Item 3: Category

Select the correct category for the item from the State-populated dropdown menu, keeping in mind the guidelines in the “Adding Items” section. Certain category selections may populate more data fields underneath unit of measure for you to complete.

## Item 4: Add button

Select this button to edit additional items while on this screen.

## Item 5: Clear button

Select this button to clear all entered data.

## Item 6: Unit of Measure

If an item belongs to a weight-based category, select the unit of measure for that item. If the item belongs to a count-based “each” Category, select “Each”. Please ensure you have selected the correct unit of measure before creating the item.

## Item 7: Save Items

Select this button to save all entered data and create the item in the system.

## Item 8: Cancel

Select this button to exit the screen without saving any information.

**Please note:** Once an item has been used, the “Name” field will be restricted. If a name edit is attempted for an item that has been used, an error will be received. However, other fields within the item can still be modified.

# Employees

A Medical Marijuana Business may designate owners and employees as Metrc users. A Medical Marijuana Business shall ensure that all owners and employees who are granted Metrc access are trained in the proper and lawful use of the system. It is strongly recommended that all users attend a Metrc training class prior to operating in the system.

*Keep in mind:* a licensee is accountable for all actions while logged into Metrc, which includes the inputting, modification, and/or deletion of any information.

The owner who is initially designated as the Metrc Administrator will add additional owners and employees to the organization's account in the Employees area under the Admin functionality. Those employees who are added with permission to the system will receive a welcome email prompting them to establish their account in the same way outlined in the First-Time Credentialing section of this guide.

The Metrc system provides the following functionality:

- Permissions
- Home Screen
- Welcome Email
- Add an Employee
- Edit an Employee
- Lock an Employee
- Unlock an Employee
- Disable an Employee

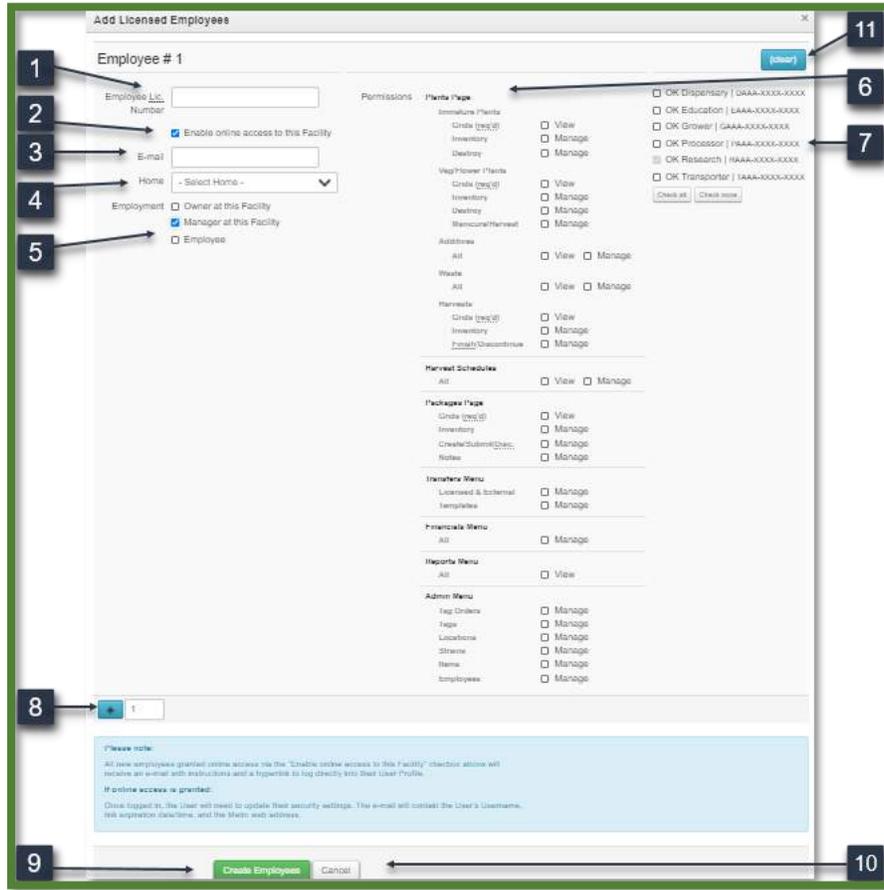
When adding an employee, it will be necessary to add permissions that an employee will use to perform tasks in the Metrc system. Employee permissions include:

- **Administration** - Provides the capability to perform all administrative, plants, packages, transfers, and sales tasks. The only exception is adding facilities.
- **Plants** - Provides the capability to create, move, change phase, and create harvests in Metrc.
- **Packages** - Provides the capability to create, adjust and re-package packages into smaller or larger quantities.
- **Transfers** - Provides the capability to create, receive, modify, or delete transfers.
- **Sales** - Provides the capability to input sales data or initiate sales uploads.

Employees can be given whatever permissions the administrator/owner thinks appropriate based on that user's job duties.

# Adding Licensed Employees

The Add Licensed Employees functionality is available under the Admin tab on the navigation bar. (Transporters are the ONLY license type that will add licensed employees. All other license types, please see the section titled “Add Unlicensed Employees.”)



### Item 1: Employee License Number

Enter the employee’s state-assigned permit/badge number. The system will associate all actions performed by a user with the license number.

### Item 2: Enable Online Access checkbox

Use this checkbox to designate whether the employee being added will or will not have access to the organization’s Metrc account. While all employees must be entered in the Employees list in the software, not all employees are required to be given Metrc access.

### Item 3: Email

Enter the employee’s individual email address. This is where the employee’s "Welcome to Metrc" email will be sent.

**Item 4: Home**

Select a "Home" screen for the employee; this is the screen they will see when logging in to Metrc. The home screen does not affect the employee's ability to move from screen to screen but does need to match the Permissions granted to the employee.

**Item 5: Employment**

This area may be used to designate the job functions of the individual being added: Owner, Manager, Bud Tender, Compliance Officer, Grower, and/or Trimmer. This designation does not automatically populate certain Permissions; the Administrator will still need to designate Permissions for each specific user.

**Item 6: Permissions**

Select the checkbox for each function an employee will need to access to complete their job tasks. This area will not be visible if you are adding an employee who will not have access to Metrc. The options available in this section vary by facility type. Owners are encouraged to be highly selective about which permissions they grant to each employee.

**Item 7: Facilities**

If an employee is being added who will have access to multiple facilities for an organization with more than one license, they may be added to those facilities at the same time. Keep in mind, however, that if the same employee needs different permissions at different facilities, the Administrator will need to add or edit that employee in each individual facility.

**Item 8: Add button**

Allows you to enter multiple employees at the same time.

**Item 9: Create & Save Employees button**

Click here to save your work and add the employee to the facility.

**Item 10: Cancel button**

Click here to exit the screen without saving any data.

**Item 11: Clear button**

Click here to clear all the information fields.

**Notes:**

- The Permissions that you select for an employee will affect the functionality available to them on the navigation bar and within each functional area.
- As specified in the First-Time Credentialing section of this guide, the login link contained in the "Welcome to Metrc" email expires 24 hours after the link is sent. If an employee fails to log in within the 24-hour period, the Metrc Administrator will need to return to the Employees menu, select that employee, and click the "Resend Welcome Email" box.

# Adding Unlicensed Employees

The Add Unlicensed Employees functionality is available under the Admin tab on the navigation bar. (All license types ASIDE from Transporters will use Unlicensed Employees. Transporters, please see section titles "Add Licensed Employees.")

The screenshot shows a web form titled "Add Unlicensed Employees" with a close button (X) in the top right. The form is divided into several sections:

- Employee # 1:** A header with a "(clear)" button (8).
- Personal Information:** Fields for First Name (1), Last Name, Birthday (MMYY) (2), E-mail (3), Phone Number (+1-123-456-7890) (4), and Home (- Select Home -) (5).
- Employment:** Radio buttons for Owner at this Facility, Manager at this Facility, and Employee (6).
- Permissions:** A large section with various checkboxes and "Manage" buttons, including:
  - OK Dispensary | DAAA-XXXX-XXXX (9)
  - OK Education | EAAA-XXXX-XXXX
  - OK Grower | GAAA-XXXX-XXXX
  - OK Processor | PMAA-XXXX-XXXX
  - OK Research | RAAA-XXXX-XXXX
  - OK Transporter | TAAA-XXXX-XXXX
  - Grids (req'd) - View
  - Inventory - Manage
  - Create/Submit/Clac. - Manage
  - Notes - Manage
  - Transfers Menu - Manage
  - Licensed & External Templates - Manage
  - Sales Menu - Manage
  - Patients Menu - Manage
  - Financials Menu - Manage
  - Reports Menu - View
  - Admin Menu - Manage (Tag Orders, Tags, Locations, Strains, Items, Employees)
  - Search Menu - View (Caragiver Status Lookup)
- Buttons:** A blue "+" button (7) and a "Create Employees" button (11) with a "Cancel" button (12).
- Notes:** A blue box with "Please note:" text (10).

## Item 1: Employee Information

Enter the employee's first and last name, as well as their date of birth and last four of their SSN. The system will associate all actions performed by a user with them.

## Item 2: Enable Online Access

Use this checkbox to designate whether the employee being added will or will not have access to the organization's Metrc account. While all employees must be entered in the Employees list in the software, not all employees have to be given access.

## Item 3: Email

Enter the employee's individual email address. This is where the employee's "Welcome to Metrc" email will be sent.

**Item 4: Phone Number**

Enter the employee's individual phone number.

**Item 5: Home**

Select a "Home" screen for the employee; this is the screen they will see upon logging in. The home screen does not affect the employee's ability to move from screen to screen but does need to match the permissions granted to the employee.

**Item 6: Employment**

This area may be used to designate whether the individual being added is a manager or an owner at the facility. This designation does not automatically populate certain Permissions; the Administrator will still need to designate Permissions for each specific user.

**Item 7: Add button**

Allows you to enter multiple employees at the same time.

**Item 8: Clear button**

Click here to clear all the information fields.

**Item 9: Facilities**

If an employee is being added who will have access to multiple facilities for an organization with more than one license, they may be added to those facilities at the same time. Keep in mind, however, that if the same employee needs different permissions at different facilities, the Administrator will need to add or edit that employee in each individual facility.

**Item 10: Permissions**

Select the checkbox for each function an employee will need to access to complete their job tasks. This area will not be visible if you are adding an employee who will not have access to the system. The options available in this section vary by facility type. Owners are encouraged to be highly selective about which permissions they grant to each employee.

**Item 11: Create & Save Employees button**

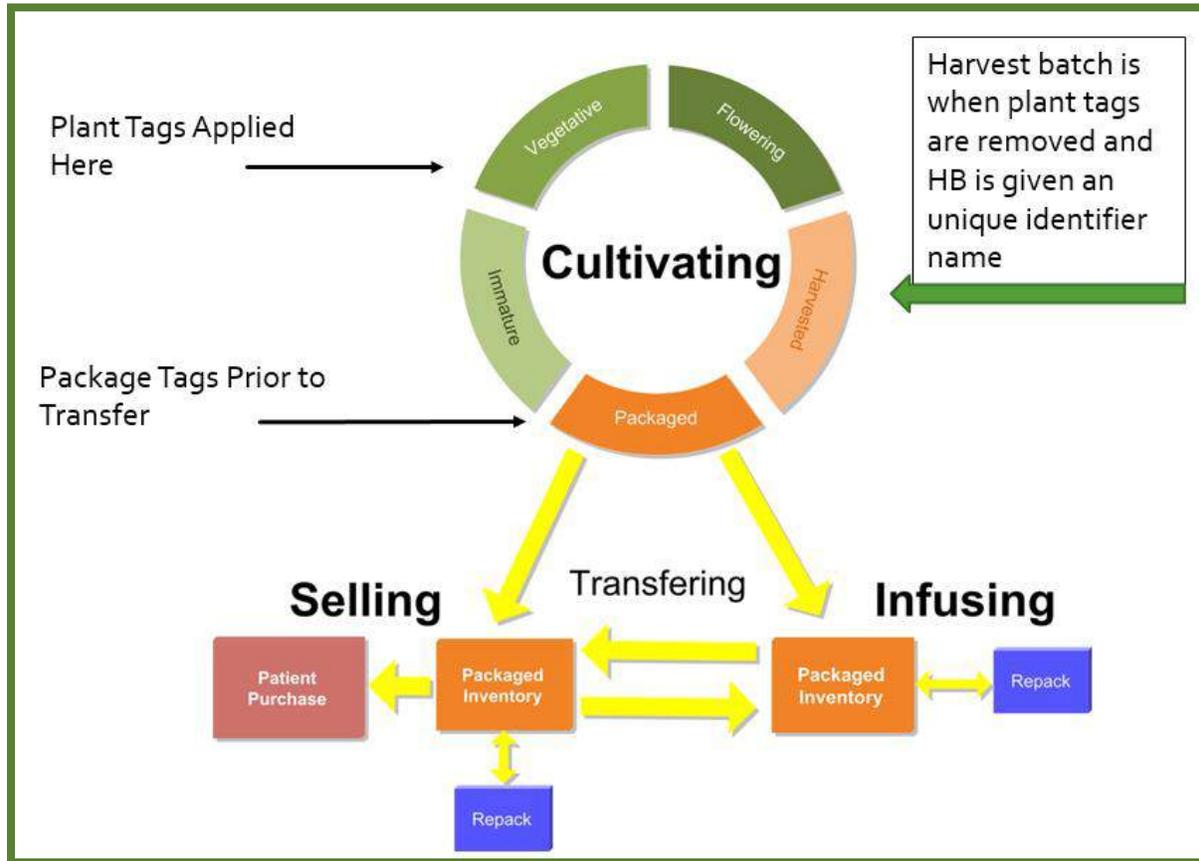
Click here to save your work and add the employee to the facility.

**Item 12: Cancel button**

Click here to exit the screen without saving any data.



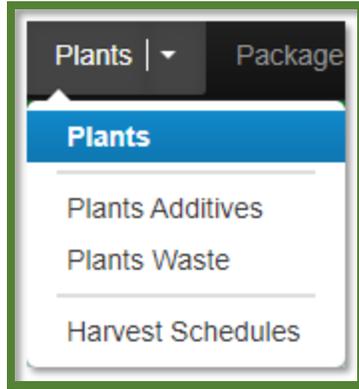
## Product Life Cycle



This diagram shows the product life cycle from seed to sale.  
The Metrc system is based on this process.

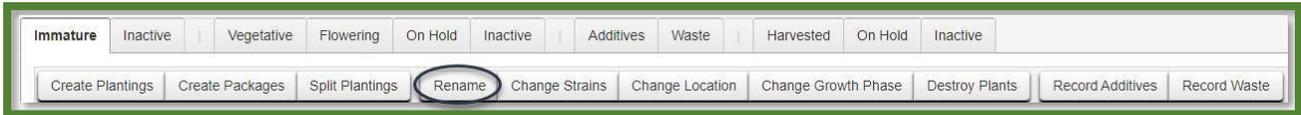
# Plants

This section of Metrc is only available to Cultivation license types. It can be accessed by navigation to the Plants section of Metrc in the Navigation bar. Plants Additives and Plants Waste can also be located here by using the drop-down arrow. This section is where all Plants (immature, vegetative, flowering, and inactive), Harvests, Additives and Waste will be found, as well as the harvest scheduler.



## Editing Planting Names

As seen below, users with permission to the plants section will have a new selectable “Rename” button within the immature tab. This button should be utilized if an immature plant batch has an incorrect name associated to the batch. Industry users should accurately identify the names of their immature plant batches, and the recommended best practice is to enter the strain name and date of planting.

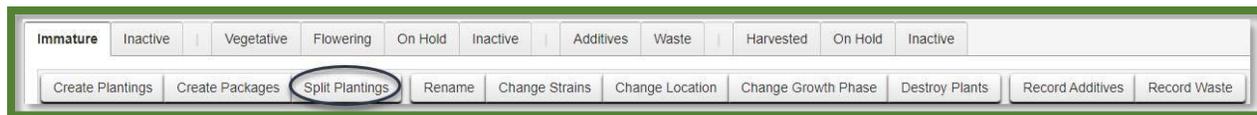


If a user identifies an immature plant batch that requires a name update, the below image is an example on how the change would be made. The user would select the immature batch in need of a change and click the “Edit Planting” button. After the selection, the user would see the box below and make the edit within the group name field. Once the edit is deemed correct, the user would click Edit Plantings.

A screenshot of a dialog box titled 'Rename Plant Batches'. The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a section for 'Plant Group # 1' with a '(clear)' button. Below this, there is a 'Group' field with the text 'Purple Dream' and a search icon. Below the 'Group' field is a 'Group Name' field with the text 'ex. B. Kush 5-30'. At the bottom left of the dialog, there is a '+' button and a text input field containing the number '1'. At the bottom center of the dialog, there are two buttons: 'Edit Plantings' (green) and 'Cancel' (grey).

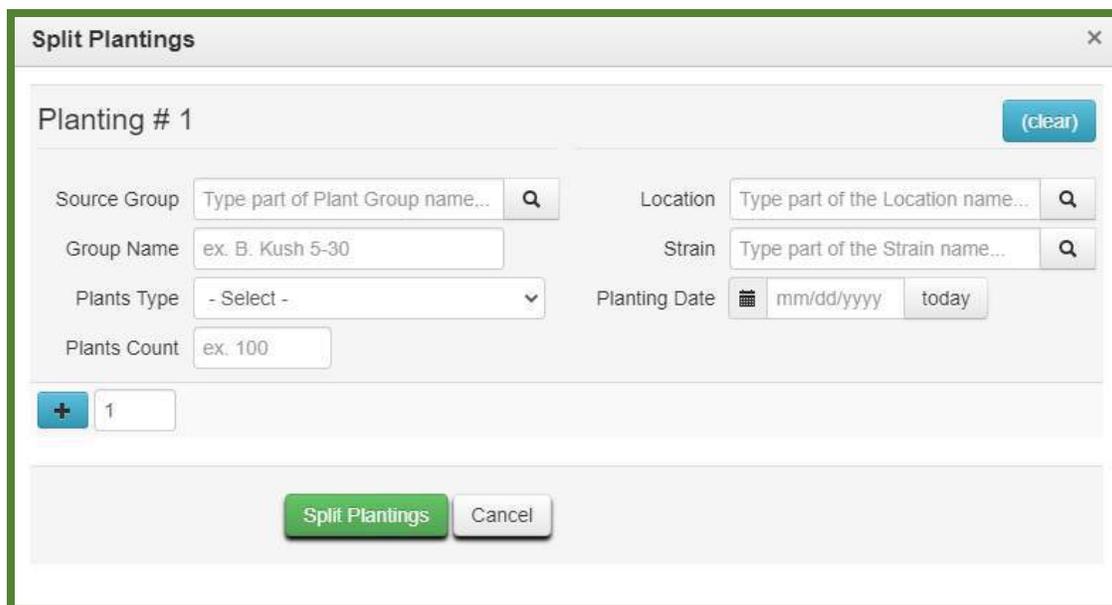
## Splitting Plantings

Immature plant batches are now able to be “split” after creation, as seen in Figures 1 and 2. This process can be used in a case of moving part of an immature plant batch to another location. *Please note that there is no way to undo this action, nor is there the ability to merge different plant batches.*



**Figure 1: Select the Immature Plant Batch to Split**

Once the Split Plantings is selected, an action window opens where they will complete the information about the new planting, including Plants Count, Group Name, Strain, Location, and Planting Date. Once this information is completed, then select the “Split Plantings” button.

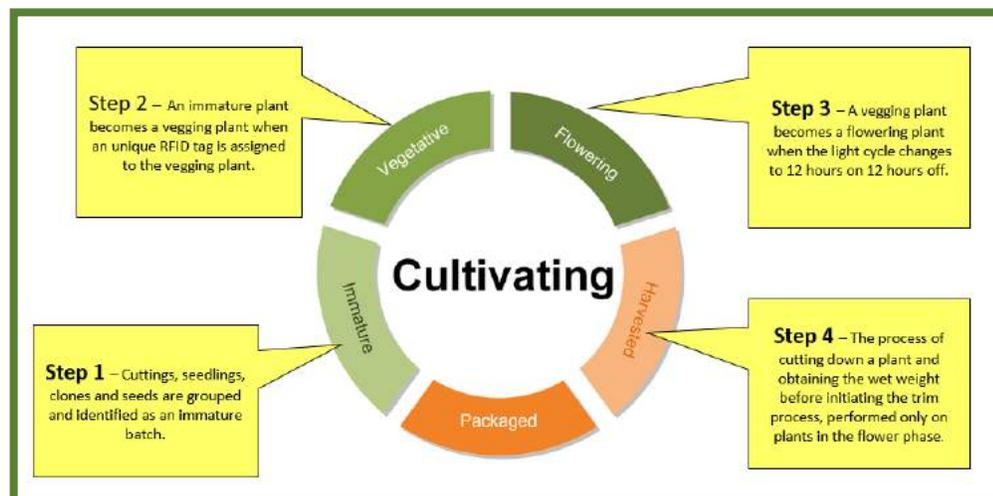
A screenshot of a 'Split Plantings' action window. The window has a title bar with 'Split Plantings' and a close button. Below the title bar is a section for 'Planting # 1' with a '(clear)' button. The form contains several input fields: 'Source Group' with a search icon, 'Group Name' with the example 'ex. B. Kush 5-30', 'Plants Type' with a dropdown menu showing '- Select -', 'Plants Count' with the example 'ex. 100', 'Location' with a search icon, 'Strain' with a search icon, and 'Planting Date' with a calendar icon and a 'today' button. At the bottom of the form is a '+ 1' button. Below the form are two buttons: 'Split Plantings' and 'Cancel'.

**Figure 2: Split Plantings Action Window**

## Plants - Keep in Mind

1. A plant can be destroyed anytime during the growth process.
2. Once plants are moved to the vegetative growth phase, a plant tag will need to be assigned.
3. Anytime you trim something off a vegetative or flowering plant with the intent to sell or process trimmed material, you must create a Manicure Batch. Manicure Batches must be strain specific.
4. Use the “Change Growth Phase” button to transition plants from one phase to another.
5. Harvest Steps:
  - Must Harvest Strain specifically
  - **Weigh** each plant individually in its entirety after cutting it from root ball (weight should include stem, stalk, bud/flower, fan leaves, trim leaves, etc.)
  - **Waste** can be collected and entered once, or multiple times based on your operating procedures, but must be reported in the system the day it is collected and assigned to the specific Harvest from which it came
  - Create **Test Samples** directly from Packages made from the Harvest Batch
  - **Package** product strain specifically from the Harvest Batch (Item specific packages)
  - Create a **Transfer Manifest** to move product from one facility to another.
  - When the product from a Harvest Batch is completely gone, digitally **Finish** the Harvest Batch regardless of the remaining weight in the system. At the point at which all physical material is gone, that remaining weight is indicative of moisture loss.
6. Plant tags are one time use ONLY. Once a Plant is destroyed or Harvested, the associated tag should be destroyed or kept separate for your records.

Below is a diagram detailing the cultivation steps.

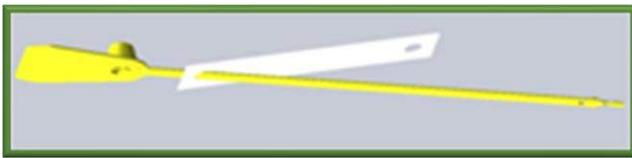


# Plant Tags

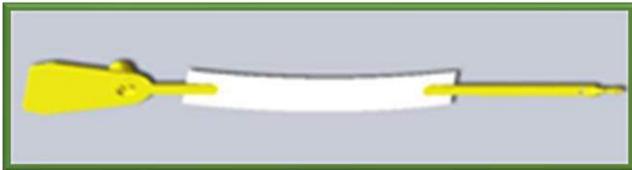
## Plant Tag Attachment



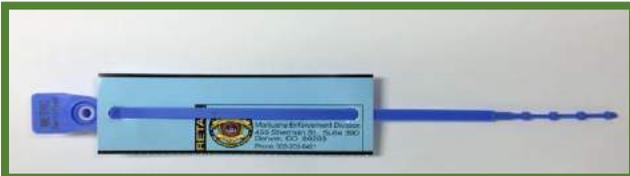
Step 1 – Remove the circular chads on each side of the Plant Tag



Step 2 – Place the strap through the hole on one side



Step 3 – Place the strap through the hole on the other side



Step 4 – Move the tag up until the notch at the top of the strap catches the label. This will ensure the label does not slide down.



Step 5 – When hanging the tag from a plant, remove the strap from the hole on one end of the tag so that the tag is hanging. Then secure fasten the point of the strap through the top of the strap.

## Attaching Tag to Plant

A Plant must be tagged once it is viable AND in a growth medium



When a plant is not large enough to carry a strap and tag, the tag can be vertically displayed by placing the pointed end of the Strap into the growth medium after completing Steps 1-4 on the previous page.

When attaching permanently to the plant



When the plant is large enough to carry the strap, pull plant strap out of perforated hole at the lower end of the Plant Tag. Place Plant Tag and strap around the plant and close the strap by inserting the pointed end into the locking mechanism. Once the pointed end of the strap is inserted into the locking mechanism, it will not come apart again, as displayed below.



## Plant Tag Strap Instructions



Figure 1



Figure 2



Figure 3

- Figure 1. Push the tail end of the strap through the lock until you hear a click and the plastic knot passes through the lock, securing the strap for first use.
- Figure 2. If you need to reposition the strap and tag, push the strap through the lock until there is enough space to clip beneath the first knot. Avoid pressing the second knot through the lock.
- Figure 3. Cut the strap as shown in the picture above, releasing the strap.

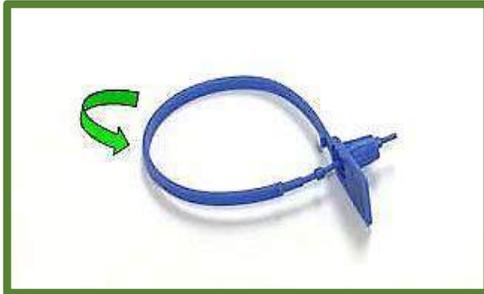


Figure 4



Figure 5

- Figure 4. When you are ready to secure the strap again, as with the first usage, push the tail-end through the lock until you hear a click and see the knot on the other side of the lock.
- Figure 5. To release the strap from the last lock, you must cut the strap.

You can repeat steps 2-4 to reuse the strap twice more, for a total of four strap placements.

# Additives

This optional functionality allows you to record and track the application of Additives by Immature Batch, individual plant, groups of two or more plants, or Location. Additives, such as fertilizer, pesticides, growing mediums, etc., can be added and tracked per plants or per location. Plant additives can also be easily accessed through the navigation bar under the Plants section. Additives can also be uploaded by using the Plant Additives CSV formatting in the CSV Formatting Guide.

Group	Strain	Location	Type	Plants	Tracked	Packaged	Harvested	Destroyed
365 G-ual	AK 47	Immature Plant Room	Clone	25	0	0	0	0
grass candy 656	Blue Dream	Immature Plant Room	Clone	314	0	0	0	0
warm apple 3.14	Blue Dream	Immature Plant Room	Clone	314	0	0	0	0
AK 47 777	AK 47	Immature Plant Room	Seed	10	0	0	0	0
blue dream 01132021	Blue Dream	Immature Plant Room	Seed	5,900	88	0	11	0
JJJ 01132021	Blue Dream	Veg Room A	Seed	10	0	0	0	0
lll 01132021	Blue Dream	Immature Plant Room	Seed	1,600	0	0	0	0
ttt 01132021	AK 47	Immature Plant Room	Seed	10	0	0	0	0
Blue Dream 12.15.20_Beginning Inventory	Blue Dream	Immature Plant Room	Seed	40	10	0	0	0

Tag	Strain	Location	Hold	Group	Group Type	Group Date	Phase
1A4FF00000012C000000001	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000002	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000003	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000004	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000005	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000006	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000007	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000008	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000009	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000010	Blue Dream	Veg Room A	No	Blue Dream 12.15.20_Beginning Inventory	Seed	01/10/2021	01/10/2021
1A4FF00000012C000000040	Blue Dream	Veg Room A	No	blue dream 01132021	Seed	01/13/2021	01/25/2021

Please note:  
The Plant Additives section is now available under the Plants menu near the top-left of the page. The existing Plant Additives tab on this page will be removed in the future.

Record Additives by Room

Type	Product	EPA No.	Supplier	Device	To
------	---------	---------	----------	--------	----

Plants | Package

- Plants
- Plants Additives
- Plants Waste
- Harvest Schedules

## Recording Additives Information

The screenshot shows a web form titled "Record Vegetative Plants Additives" with a close button (X) in the top right. The form is for "Plant Additive # 1" and includes a "(clear)" button. The form is divided into two main sections. The left section contains input fields for: 1. "- Lookup -" (dropdown), 2. "Type" (- Select - dropdown), 3. "Product Name" (text), 4. "EPA Reg. No." (text, example: 123-4567), 5. "Supplier" (text), 6. "Appl. Device" (text), 7. "Total Amount" (text, example: 100.2, unit: ex. Gallons), and 8. "Date Applied" (calendar icon, text: mm/dd/yyyy, button: today). The right section contains: 9. "Active" (checkbox), 10. "Ingredient # 1" (text, example: ex. %, button: +), 11. "Plant # 1" (text, example: Type part of Plant number., button: +), and 12. "Record Additives" (green button) and 13. "Cancel" (grey button). A plus sign (+) button is located below the input fields.

The screen capture shown above shows the recording of additives for a Plant in the Vegetative phase. The information you will input is the same whether you record additives by Immature Batch, individual plant, groups of two or more plants, or Location except for Item 10, which would be Batch information, Plant(s) information, and Location information respectively.

### Item 1: Lookup

You can use the Lookup drop down to select information that has been entered before.

### Item 2: Type

Select the type of additive being applied from the dropdown menu.

### Item 3: Product Name

Enter the Product Name from the label.

### Item 4: EPA Regulation Number

Enter the EPA Regulation Number if applicable.

### Item 5: Supplier

Enter the additive Supplier name.

### Item 6: Application Device

Enter the type of device being used to deliver the additive.

### Item 7: Total Amount

Enter the Total Amount of additive being applied.

**Item 8: Date Applied**

Enter the date of application.

**Item 9: Active Ingredient #1**

Enter the first Active Ingredient from the additive label. You may use the blue addition button under and just to the left of this item to add additional active ingredients.

**Item 10: Percentage**

Enter the percentage of the active ingredient you have listed, as shown on the product label.

**Item 11: Plant**

Enter the Plant(s) to which the product is being applied. If you were recording additives by Immature Batch, this would be Batch information. If you were recording additives by Location, this would be Location information. The blue addition button under and just to the left of this item may be used to identify additional Plants, Batches, or Locations the product is being applied to.

**Item 12: Record Additives button**

Select Record Additives to save the information and exit the screen.

**Item 13: Cancel button**

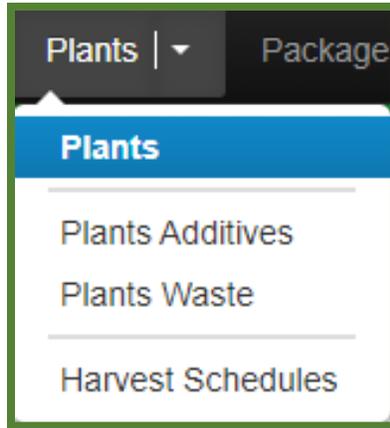
Select this button to exit the screen without saving any information.

**Item 14: Clear button**

Select this button to clear all entered information.

## Plant Waste

Like Additives discussed above, waste can be reported by Immature Batch, individual plant, groups of plants, or Location. The Waste option is to the right of the Additives option in each scenario.



# Reporting Waste Information

The screenshot shows a web form titled "Record Flowering Plants Waste". The form is titled "Plant Waste # 1" and includes a "(clear)" button. It contains several input fields and dropdown menus, each with a numbered callout:

- 1: Waste Method dropdown menu.
- 2: Material Mixed text input field.
- 3: Waste Weight input field with a unit dropdown menu (currently showing "g. 100.2").
- 4: Reason dropdown menu.
- 5: Optional Note text input field.
- 6: Waste Date input field with a calendar icon and a "today" button.
- 7: Plant # 1 search input field with a search icon and a "(plants)" button.
- 8: A blue "+" button.
- 9: "Record Waste" button.
- 10: "Cancel" button.
- 11: A "(clear)" button in the top right corner.

The screen capture shown above shows the recording of waste by Location. The information you input is the same whether you record waste by Immature Batch, individual plant, or groups of two or more plants, except for Item 7, which would be Batch information, and Plant(s) information, respectively.

## Item 1: Waste Method

Select the waste method from the dropdown menu.

## Item 2: Material Mixed

Identify the material with which the waste was mixed to dispose of the product in accordance with regulations.

## Item 3: Waste Weight

Input the total weight of the product being wasted and select the Unit of Measure from the dropdown menu.

## Item 4: Reason

Select the most appropriate reason why the product is being destroyed from the dropdown menu.

## Item 5: Optional Note

You may choose to use this area to provide additional information about why the product is being destroyed.

**Item 6: Waste Date**

Enter the date the material was destroyed.

**Item 7: Location**

Enter the Location from which the waste came. If you were entering waste by Immature Batch, this would be the Batch information. If you were entering waste by Plant or groups of two or more plants, this would be the Plant(s) information.

**Item 8: Add button**

You may use the add button to record more than one waste entry at a time from this screen.

**Item 9: Record Waste button**

Select Record Waste to save the information and exit the screen.

**Item 10: Cancel button**

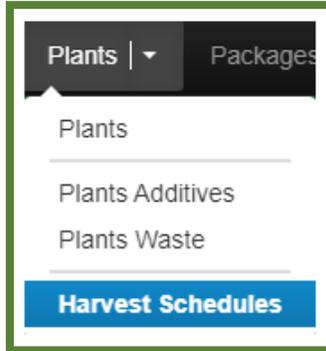
Select the Cancel button exit the screen without saving any information.

**Item 11: Clear button**

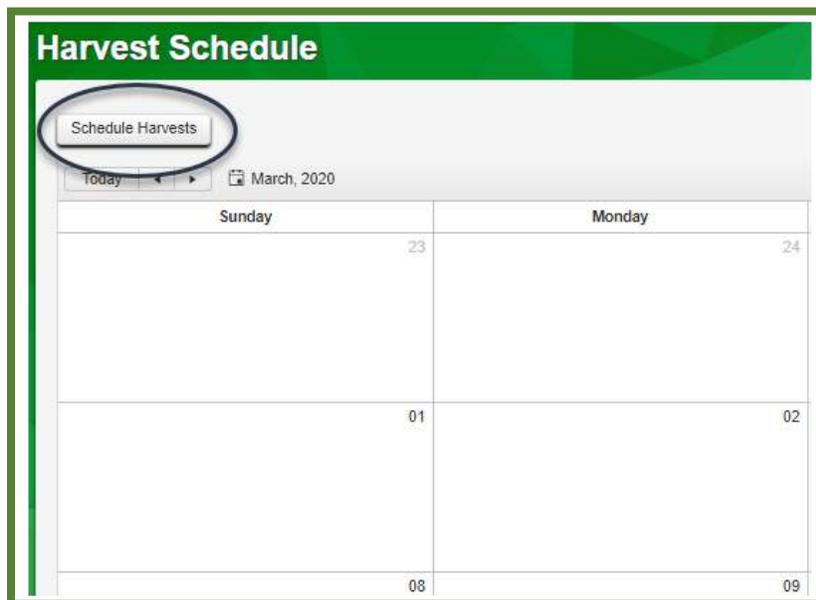
Select the Clear button to clear all entered data.

# Harvest Scheduler

Harvests can be scheduled by navigating to the Harvest Schedules section in the Plants tab in the Metrc Navigation bar.



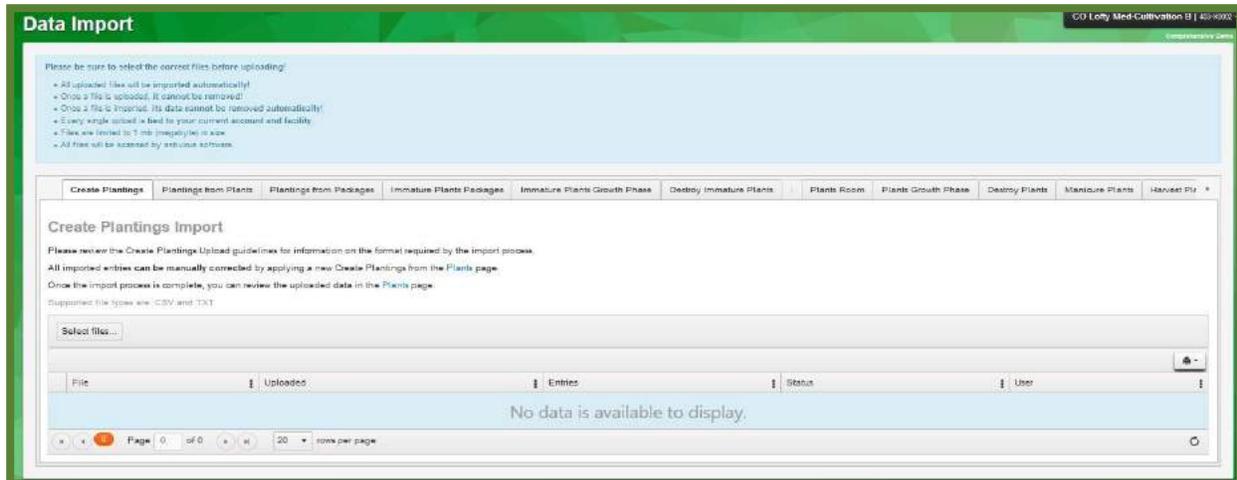
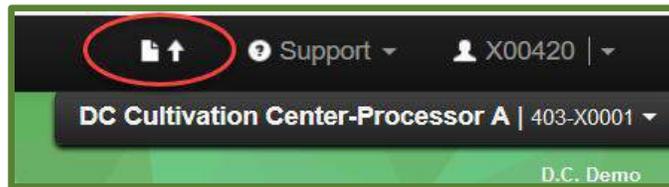
When the Harvest Schedules is selected, a calendar will be displayed on the screen that shows all harvests that have been scheduled for the selected license for that month. Harvests can be scheduled by selecting the “Schedule Harvests” button as shown below.



# Plants Uploads

## .CSV Upload for the Plants Grid

Cultivators may choose to upload a variety of data sets as .csv files instead of manually entering the information into Metrc. To do this, the user would navigate to the data import icon (a sheet of paper with the upper righthand corner folded in with an up arrow to the right) to the left of the Support function on the navigation bar, select the tab for the dataset they intend to upload, and hit the “Select files...” button. You would then locate the file on your device and follow the prompts to upload it. If it does not upload, there are critical errors in the document. If it uploads successfully, the document will appear in green or red. If it is green, you are good to go. If it is red, there are errors in the document. A dropdown arrow will be to the left of the file so that you can view the errors. If you manually correct the information, you must upload a new file with a different file name to capture the changes. For guidance on how to format these uploads, please view the CSV Formatting Guide under your Support Tab. For additional information on uploading information to the system, please reach out to Metrc Support via email or phone. The CSV file should contain no more than 500 lines per file.



## Packages

This section of Metrc is available to all license types. It can be accessed by navigation to the Packages section of Metrc in the Navigation bar. In the Packages area is where all Active, On Hold, In Transit and Inactive packages can be found. Only packages that currently reside within the license will be found here.







# Creating Packages from Harvest Batch

The screenshot shows a 'Create Packages' window with a 'New Package # 1' header. It contains several input fields and buttons, each with a numbered callout:

- 1: New Tag (text input with magnifying glass)
- 2: Location (text input with magnifying glass)
- 3: Item (text input with magnifying glass)
- 4: Quantity (dropdown menu with 'Calculated' and '- Select -' options)
- 5: Note (text input)
- 6: Package Date (calendar icon, 'mm/dd/yyyy', and 'today' button)
- 7: Production Batch (checkbox)
- 8: Product Requires Remediation (checkbox)
- 9: Harvest # 1 (text input with magnifying glass)
- 10: Please select a Harvest. (dropdown menu with 'ex. 100.23' and 'Grams' unit)
- 11: Create Packages (green button)
- 12: Cancel (grey button)
- 13: (clear) (blue button)

## Item 1: New Tag

Enter or use the magnifying glass to the right to select the next alphanumeric tag number from your tag inventory to assign and affix to the product being packaged.

## Item 2: Location

Select the location for where the package will be stored.

## Item 3: Item Drop Down

Select the appropriate Item from the dropdown list. Use the magnifying glass to the right to view a list of your license's Items.

## Item 4: Package Quantity

Select the unit of measure from the dropdown menu.

## Item 5: Note

Enter any necessary notes for the creation of this package.

## Item 6: Package Date

The day the package is being made. Select "today" to populate the current date.

**Item 7: Other Package Options**

Only select the Production Batch checkbox if the package you are creating is a new Production Batch. Only select Product Requires Remediation if the product is being remediated.

**Item 8: Add Contents Button**

You can use this button to add additional sources from which you are packaging product.

**Item 9: Harvest Batch Name**

Enter the Harvest Batch from which the product is being packaged. You can click the magnifying glass icon to the right to display a list of all the active Harvest Batches at your facility.

**Item 10: Quantity Pulled from Batch**

Enter the weight of the product being packaged from the Harvest Batch and select the unit of measure from the dropdown menu.

**Item 11: Create Packages Button**

Select Create Packages to save the information and create your package(s) in Metrc.

**Item 12: Cancel Button**

The Cancel button will exit the screen without saving any data.

**Item 13: Clear button**

The Clear button will clear all entered information.

## Creating Packages from Existing Package(s)

The screenshot shows a 'New Packages' window with the following fields and callouts:

- 1: New Tag (input field with magnifying glass)
- 2: Location (input field with magnifying glass)
- 3: Item (input field with magnifying glass)
- 4: Same Item (checkbox)
- 5: Quantity (input field with unit dropdown and sum button)
- 6: Note (text area)
- 7: Package Date (calendar icon, mm/dd/yyyy, today)
- 8: Production Batch (checkbox)
- 8: Product Requires Remediation (checkbox)
- 11: Package Count (+, 1)
- 12: Add contents button (+)
- 13: Create Packages button
- 14: Cancel button
- 9: Package # 1 (input field with magnifying glass)
- 15: (clear) button

### Item 1: New Tag

Enter or use the magnifying glass to the right to select the next alphanumeric tag number from your tag inventory to assign and affix to the product being packaged.

### Item 2: Location

Select the location where the product will be stored.

### Item 3: Item Drop Down

Select the appropriate Item from the dropdown list. Use the magnifying glass to the right to view a list of your license's Items.

### Item 4: Same Strain

Check this box to use the same item for the new package as was used for the old one.

### Item 5: Package Quantity

Select the unit of measure from the dropdown menu.

### Item 6: Note

Enter any necessary notes for the creation of this package.

**Item 7: Package Date**

Select the day on which the package is being made. Select "today" to populate the current date.

**Item 7: Production Batch Checkbox**

Only select the Production Batch checkbox if the package you are creating is a new Production Batch.

**Item 8: Package Details**

Check these boxes to designate the new package as either a production batch or one that requires remediation.

**Item 9: Package #1**

Enter the source package tag from which product is being packaged. You can click the magnifying glass icon to the right to display a list of all the active Packages at your facility.

**Item 10: Quantity Pulled from Package**

Enter the weight of the product being packaged from the Source Package and select the unit of measure from the dropdown menu.

**Item 11: Add Button**

The Add button can be used to create additional packages from the same screen. Use the number field to input the number of packages you want to create.

**Item 12: Add Contents Button**

You can use this button to add additional sources from which you are packaging product.

**Item 13: Create Packages Button**

Select Create Packages to save the information and create your package(s) in Metrc.

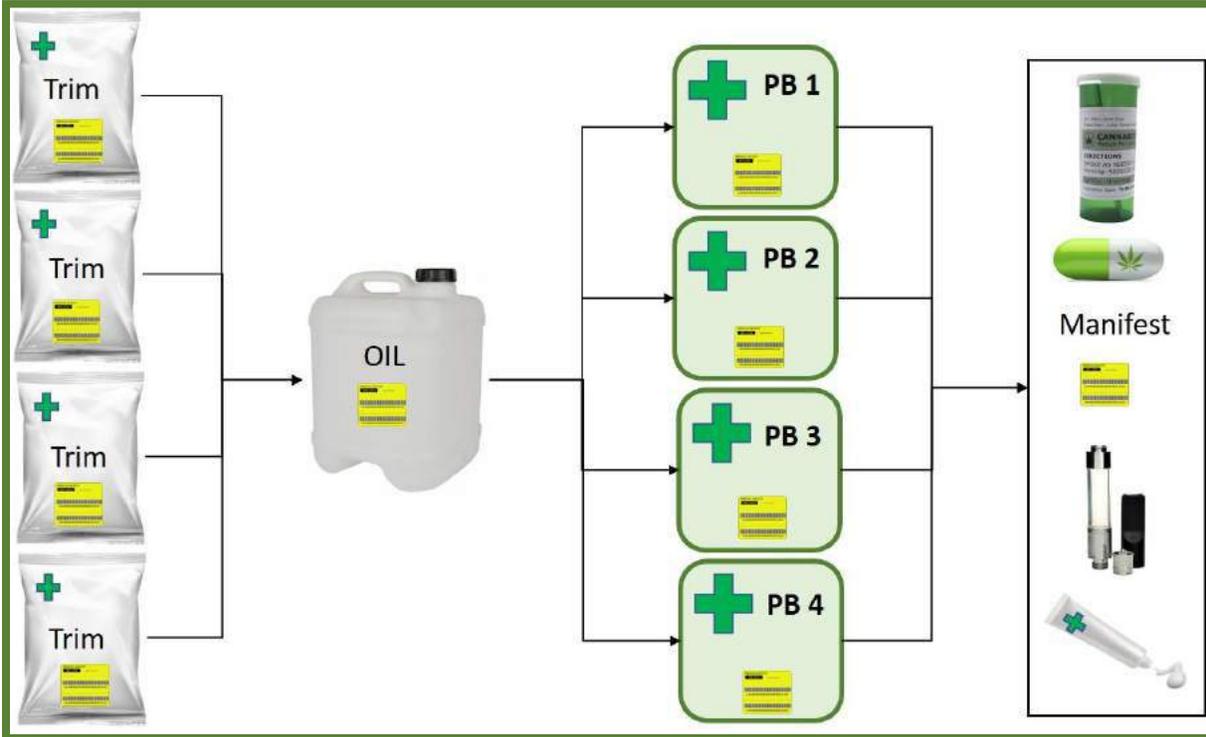
**Item 14: Cancel Button**

The Cancel button will exit the screen without saving any data.

**Item 15: Clear button**

The Clear button will clear all entered information.

## Edible/Non-Edible Process



In this graphic, you can see how several packages of Flower and Trim were used to create an intermediate product (Production Batch of Concentrate). Some of that Concentrate is then used to make four separate Production Batches. If these are the final Production Batches, product will be pulled from them to create “sale packages” that will be manifested to the Dispensary. Every item being created in the graphic requires a new package tag, which will carry the source package in its history, ensuring accurate product tracking throughout the supply chain.

## Package Adjustments/Rejections

Package Adjustments can be made in the system to address certain discrepancies, inconsistencies, and errors in the data that have been entered. Package Adjustments cannot be used to correct an error in sales data at a Dispensary. Package adjustment reasons are populated by the state; licensees may use the note section to further explain why a package adjustment was made.

A licensee can reject one or more packages from a manifest that they are receiving. Rejection reasons are populated by the state; licensees may use the note section to further explain why they are rejecting a certain package.

# Adjustment Reasons

The current Adjustment Reasons, as populated by the State, are:

**API Related Error** – an error that occurred during an API update.

**Contaminant Testing** - Testing Lab ONLY, this is used when a portion of the package will be removed to be used in the testing process.

**removed to be used in the testing process.**

**Damage/Soilage** – Used to adjust for product that has expired or gone bad or damaged.

**Drying/Moisture Loss** - 5-7 grams per pound

**Mandatory State Destruction** – A product that the state says should be destroyed.

**Potency Testing** – Testing Lab ONLY, this is used when a portion of the package will be removed to be used in the testing process.

**Sample Used During Testing** – A sample that is created for testing.

**Scale Variance** – When there is a difference between two scales (not drying)

**Test Sample Destruction** – used when a sample jar product is being destroyed.

**Theft** - used for any type of theft (licensee must also notify the state and file documentation with Metrc)

**Typing/Entry Error** -- only to be used in the instance of a minor typing or other entry error.

**Waste Destruction** – used for any type of waste that is recorded.

## Packages - Keep in Mind

1. Seeds or Immature plants can be packaged strain specifically from the Immature Plants menu and transferred for sale.
2. To create an intermediate product, like a Production Batch of Concentrate, you will pull from a package or packages of raw product to create the new package for the new Concentrate. You may then pull product out of that Production Batch to create additional Production Batches (e.g. infused edible products). Each new Production Batch will have a new Package Tag and be marked as a Production Batch. If these Production Batches are final products, packages will be created from them for transfer to the Dispensaries and distribution to Patients.
3. A package must exist to be selected for transfer. Transfers are real time inventory dependent.
4. There must be a contents section identifying the source package(s) for each new package created by pulling product from an existing package.
5. Select the most appropriate adjustment reason from the dropdown menu when adjusting a package.
6. To send a sample for testing from a package, Submit for Testing out of an existing package to create a new package for the Test Sample.
7. Package tags may only be used once and for the product they were originally created to hold.

## Package Detail Icons

Instead of drilling down to see package details, you will see small icons next to the package number that provide important information regarding that package. If these icons are seen to the right of a manifest number, that manifest contains packages that displays those characteristics. Below are the different icons that might be shown.

**From left to right:**



Contains at least one plant package

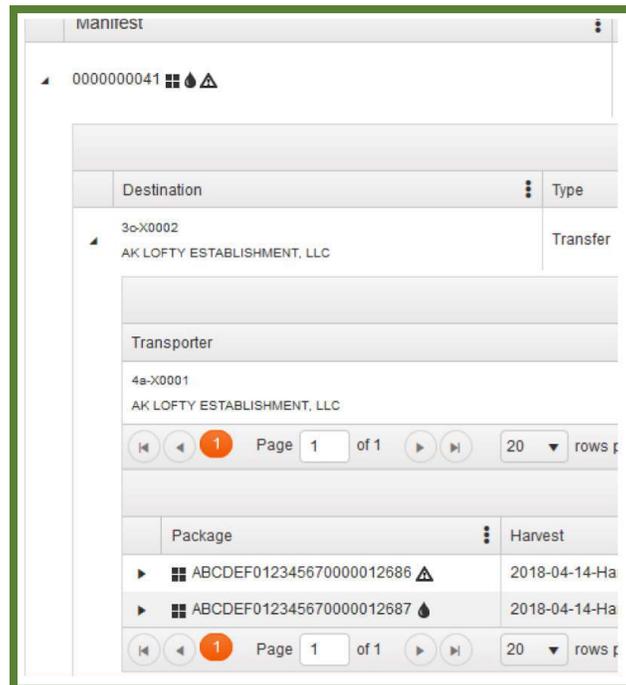
Contains at least one product package (i.e. buds, trim, brownies, etc.)

Contains at least one lab sample package

Contains at least one package flagged with “Product Requires Remediation”

Contains at least one package that has remediated product

**Displayed on a manifest, the icons will appear as below:**



# Templates

Green template check buttons are available in multiple places throughout the software to save you time. Using them, you can populate the common information for Plants you are phasing, Harvest or Manicure Batches you are creating, Packages you are creating, etc.



The screenshot shows a dialog box titled "Harvest Flowering Plants" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Template" in green text. Below this section, there are four fields, each with a green checkmark button to its right:

- Harvest Name** (optional): A text input field with a green checkmark button.
- Unit of Measure**: A dropdown menu showing "- Select -" with a green checkmark button.
- Drying Location**: A text input field with the placeholder "Type part of the Location name..." and a search icon (Q), with a green checkmark button.
- Harvest Date**: A date picker showing "mm/dd/yyyy" and a "today" button, with a green checkmark button.

In the example above, you could populate your Harvest Name, Unit of Measure, Drying Location, and Harvest Date and then select each green template check next to the items to populate that same information for every plant you've selected to be a part of the Harvest Batch.



**Item 8: Prior Package Quantity**

The Quantity field is used if the same quantity is being pulled from each of the prior packages.

**Item 9: Prior Unit of Measure**

This Unit of Measure field is used if the same unit of measure is being used to pull from each of the prior packages.

**Item 10: Prior Package Tag Number**

This Package Tag field is used if all new packages are being created from the same previous package tag.

**Item 11: Prior Package Quantity**

This Quantity field is used if the same quantity is being pulled from each of the prior packages if the same prior package tag is being used for all new packages.

**Item 12: Prior Unit of Measure**

This Unit of Measure field is used if the same unit of measure is being used to pull from each of the prior packages if the same prior package tag is being used for all new packages.

**Item 13: Add Button**

This button allows for additional packages to be created from the same source package.

## Sort and Filter Functions

Drill Down Arrow - shows you the history of the item

Sort:  
- Ascending  
- Descending

Sort by ONE Column at a time

Filter by:  
Equal to  
And  
Equal to  
Filter Clear

Filter by MULTIPLE Columns at a time

Hitting the drilldown arrow to the left of an item anywhere in the system will list the history for that item.

You can sort the data in any column by clicking at the top of the column. One click sorts the data in ascending alphanumeric order, two clicks sorts the data in descending alphanumeric order, and a third click clears the sort. Sort by one column at a time. Sort functionality is also available under the three-button menu icon to the right of each column name.

By clicking on the three-button menu icon to the right of each column name, you can select Filter functionality and filter the data in the corresponding column. You can filter multiple columns at a time, but please remember to Clear your filters when you are finished using them.

Refer to the Metrc Manual/User Guide for additional information.

## Search Functions for Items

This feature allows you to search within each of the individual columns. Once you have entered the information into the fields, select the Filter button to start the query. See the Metrc Manual/ User Guide for more information.



### Item 1: First Search Parameter

This filter box is shown for all items except a column where quantities are involved. This is where you can choose how you want to filter your search. Your choices are: Contains, Does not Contain, Starts with, Ends with, Is Equal to, and Is not Equal to.

### Item 2: Entry Box for Information

This Entry Box is used to input any part of the information that you are wanting to search (Such as the last few digits of your package tag).

### Item 3: And/Or Multiple Filter Addition

Multiple Filter Addition box is the place that you can choose to add another filter in addition to the first one. Your choices are: And & Or. By using the "And" option it means the results would contain BOTH the first filter and the second filter parameters to show results. The "OR" means the search results will show results from either search field or both if applicable.

### Item 4: Second Search Parameter

A Second Filter Box is used if you want to filter your search by 2 choices. (For example, "Starts with" and "Ends with") Your choices are: Contains, Does not Contain, Starts with, Ends with, Is Equal to, and Is not Equal to.

**Item 5: Entry Box for Information**

This Second Entry Box is for you to enter the other search criteria that you are searching for. Your choices are: Contains, Does not Contain, Starts with, Ends with, Is Equal to, and Is not Equal to.

**Item 6: Filter button**

Filter button is the button that you choose when you are ready to begin your search or filter your choices in order to find the criteria you are wanting to find.

**Item 7: Clear button**

The clear button is used to clear all of your previously entered information that you have used to filter. This will return all your information that existed prior to your filtering.

## Search Functions for Quantities



### Item 1: First Search Parameter

The Filter Box is used to choose how you will filter your times. The choices are: Is equal to, Is not equal to, Is greater than or equal to, Is greater than, Is less than or equal to, and Is less than.

### Item 2: Entry Box for Information

The Entry Box is used to put the information that helps to filter your search.

### Item 3: And/Or Multiple Filter Addition

The Multiple Filter Addition is used to add an additional filter to your search.

### Item 4: Second Search Parameter

A Second Filter Box is used if you want to filter your search by two choices. (For example, "Starts with" and "Ends with") Your choices are: Contains, Does not Contain, Starts with, Ends with, Is Equal to, and Is not Equal to.

### Item 5: Entry Box for Information

The second Entry Box is used to put in additional information that helps to filter your search.

### Item 6: Filter button

Filter button is the button that you choose when you are ready to begin your search or filter your choices in order to find the criteria you are wanting to find.

### Item 7: Clear button

The clear button is used to clear all of your previously entered information that you have used to filter. This will return all your information that existed prior to your filtering.

# Search Options

## EXAMPLES:

### One Search Parameter

Search Options allow you to search by: "is equal to", "is not equal to", "starts with", "contains", "does not contain" and "ends with".

- Package Tag - if you know the exact package tag - Search with "is equal to".
- Package Tag - if you know the first 3 digits of the package tag number - Search by "starts with".
- Package Tag - if you know the last 3 digits of the package tag number - Search by "ends with" or "contains".

### **Search functions do not use wild cards.**

Multiple Search Criteria Options allow you to search by: "and or". This search feature allows you to search single or multiple values.

- Package Tag - If you know the first 3 digits of a package tag number and the last 2 digits of that package tag, you would enter those into the first parameter and the second parameter choosing the "and" button.
- If you wanted to see all the transfers in a particular month you would put the month in the first parameter and the year in the second parameter while selecting the "and" button.

### Multiple Search Parameters

You can search by 2 parameters. The Search Options allow you to search both by: "is equal to", "is not equal to", "starts with", "contains", "does not contain" and "ends with".

- Package Tag - if you know the first 3 digits and the last 3 digits of the package tag - Search with "starts with" and "is equal to".
- Transfer Date - if you know what date the transfers were initiated - Search with "is equal to".

## Transfers - Keep in Mind

1. A transfer manifest must be created to move packages from one license to another.
2. There are ten (10) types of Transfers: Beginning Inventory Transfer, Incoming Patient Processing Transfer, Lab Samples Transfer, to be used when sending Test Samples to a Testing facility that is listed in Metrc, Licensee to Licensee Return Transfer, Outgoing Patient Processing, Patient/Caregiver Recall Return Transfer, Patient/Caregiver Testing Transfer, Voluntary Patient/Caregiver Return Transfer, Waste Disposal, to dispose of waste, Wholesale Transfers, to be used when money is being exchanged for the product, and Licensee to Licensee Return, to be used when returns occur.
3. To produce a physical manifest to print and send with the driver, click on the manifest number to highlight the item in orange, then click on the “View Manifest” button. The manifest will open as a PDF in a new window for you to print.
4. A package must be received in its entirety; you cannot receive a partial package (i.e. 200/400 grams of raw product).
5. You can reject one or more packages from a manifest; you can also reject a manifest in its entirety.
6. If a package that you have sent is rejected by the recipient, you will need to navigate to the “Rejected” tab in the “Transfers” function on the navigation bar to receive the item or items back into your inventory once they are physically back on site.
7. A package must exist to be selected for transfer; transfers are real time inventory dependent.
8. When receiving a manifest digitally, you should always physically verify the count/weight of each package. Be sure to account for discrepancies by modifying the received count/weight. Consider rejecting the package if a substantial discrepancy exists between the reported shipped amount versus the amount you are receiving. A modified count/weight on the receiving end will raise an exception in the state reporting.
9. You must digitally receive a transfer in the system within 24 hours of physically receiving the product.

10. Reject any suspicious or incorrect transfers.

## Cultivating

The screenshot shows a web form titled "New Licensed Transfer" with the following fields and callouts:

- 1**: Destination 1 (input field)
- 2**: Planned Route (text area)
- 3**: Transport # 1 (input field)
- 4**: Employee ID (input field)
- 5**: Package # 1 (input field)
- 6**: Whsle, Price (input field)
- 7**: (input field)
- 8**: Select files... (button)
- 9**: Type (dropdown menu)
- 10**: Est. Departure (time selection)
- 11**: Est. Arrival (time selection)
- 12**: Register Transfer (button)
- 13**: Cancel (button)

## Creating Licensed Transfers

### Item 1: Destination

Facility License of the Destination of the transfer

### Item 2: Planned Route

This is the route that the driver will be taking to get to his destination.

### Item 3: Transporter

This is the Facility License number of the Transporter as well as their phone number.

**Item 4: Employee ID, Name and Driver's License Number**

Employee's Worker Permit Number, the name and license number of the driver that is transporting the manifest.

**Item 5: Package**

Package(s) that will be transported.

**Item 6: Wholesale Price**

Input the price per package.

**Item 7: Add Button – Additional Packages**

This is the area to add more packages to the manifest.

**Item 8: Select Files**

This is where you can upload a CSV file of packages that will be included on the transfer. The format can be found under the Support tab in the CSV Formatting Guide.

**Item 9: Type**

This is the type of Transfer that you are creating.

**Item 10: Est Departure Date and Time**

Estimated time and date that the driver is expected to Depart the origin location.

**Item 11: Est Arrival Date and Time**

Estimated time and date that the driver is expected to arrive at the destination.

**Item 12: Register Transfer**

This is where you complete the transfer after it is completely filled out.

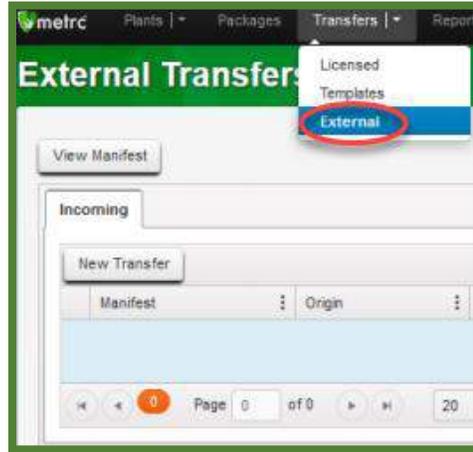
**Item 13: Cancel Button**

Cancel button is used to exit the current screen without making any new packages and return to the previous screen.

# Creating Incoming External Transfers

External Transfers are a two-step process which will require the user to go to the External Transfers Grid to create and receive the transfer into their active inventory.

The two-step process is as follows:



Once you have selected “External” under the Transfers tab on the navigation bar. Create the incoming external transfer by clicking the “New Transfer” button. This will bring up a screen below where you will enter the required information.

## Item 1: Type

This is the type of Transfer that you are creating.

**Item 2: Planned Route**

This is the route that the driver will be taking to get to his destination.

**Item 3: Package**

Package(s) that will be transported.

**Item 4: Est. Departure Date and Time**

Estimated time and date that the driver is expected to Depart the origin location.

**Item 5: Est. Arrival Date and Time**

Estimated time and date that the driver is expected to arrive at the destination.

**Item 6: Destination Gross Weight**

The total weight of the item plus packaging when it arrives at the destination.

**Item 7: Gross Weight**

The total weight of the item plus packaging before it arrives at the destination.

## Overdue Transfers

The Transfers section will display a red number on the tab (Outgoing/Incoming) indicating the total number of overdue transfers. These transfers have exceeded the time window of one hour outside of the delivery arrival time. The Transfers tab for both the sender of the manifest and the destination will display the notification. If there are no overdue transfers, only the black number for total pending transfers will be displayed.



### Item 1: Red Numbers

This is the number of transfers that are exceeding one hour from the estimated arrival time.

### Item 2: Black Numbers

This is the total number of pending transfers within this tab.

## Color-Coding Transporters and Packages

Transfer manifests in Metrc will be color-coded according to the status of each transfer in the system. “Outbound” and “Return” transporters will be color-coded to indicate the direction of the transfer. Outbound transporters will have light green shading, while Return transporters will have light red (or pink) shading as show in the figure below.

Any in-transit package, meaning the package has not been received or rejected, will have light gray shading. Once the destination facility takes an action to receive or reject a package, the package status on the manifest will be updated and color-coded accordingly. Received packages have a status of “Accepted” with light green shading. Rejected packages have a status of “Rejected” with light red (or pink) shading. Rejected packages that have been received back into the shipping facility’s inventory will have a status of “Returned” with light red (or pink) shading.

		<b>METRC®</b> <b>MARIJUANA TRANSPORTATION MANIFEST</b>	
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>	<b>000008801</b>	<b>Date Created</b>	9/24/2019 12:16 PM
<b>Originating Entity</b>	AK LOFTY ESTABLISHMENT, LLC		<b>For Agency Use Only</b>
<b>Originating License Number</b>	3c-X0002		
<b>Address of Originating Entity</b>	550 West 7th Ave. Suite 1600 Anchorage, AK 99501 County: Anchorage		
<b>Phone No. of Originating Entity</b>	+1-800-420-MAIN		
<b>1. Destination</b>	AK LOFTY ESTABLISHMENT, LLC	<b>Destination Phone No.</b>	+1-800-420-MAIN
<b>Destination License Number</b>	3c-X0002	<b>Date and Approx. Time of Departure</b>	9/24/2019 12:15 PM
<b>Address of Destination</b>	550 West 7th Ave. Suite 1600 Anchorage, AK 99501 County: Anchorage	<b>Date and Approx. Time of Arrival</b>	9/24/2019 12:15 PM
		<b>Date/Time Received</b>	11/5/2019 11:03 AM
<b>Route to be Traveled</b>	Main	<b>Notes:</b> details for extenuating circumstances (e.g., road closure, flat tire, etc.)	
<b>1. Outbound Transporter</b>	AK LOFTY ESTABLISHMENT, LLC	<b>No Layover Scheduled</b>	
<b>Transporter License Number</b>	3c-X0002		
<b>Address of Transporter</b>	550 West 7th Ave. Suite 1600 Anchorage, AK 99501 County: Anchorage		
<b>Contact Phone No. for Inquiries:</b> +1-800-420-5555			
<b>Name of Person Transporting</b>	person	<b>Employee ID of Driver</b>	person
<b>State Driver's License No.</b>	person	<b>Signature of Person Transporting</b>	
<b>Make, Model, License Plate No.</b>	car car car		
<b>1. Package   Rejected</b>	<b>Production Batch No.</b>	<b>Item Name</b>	<b>Quantity</b>
ABCDEF01234567000014075 Lab Test: NotSubmitted		Buds - Flo (Bud/Flower)	Shp: 2.0000 g
<b>Item Details</b>	Strain: Flo		
<b>Source Harvest(s)</b>	2019-01-30-Brians Test Room-M		
<b>Source Package(s)</b>	ABCDEF012345670000013021		
<b>PRODUCT REJECTION (if only a portion of shipment is rejected, circle that portion above)</b>			
<b>Name of Person Receiving or Rejecting Product</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 <i>not</i> 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>			

# Sales

## Entering Sales at the Dispensaries

Only Dispensaries send Sales information in the system. Recording Sales in Metrc is "reporting the last event in chain of custody" in this Seed-to-Sale tracking software.

Sales may be entered two (2) ways:

1. Manually
2. Data Import - via .csv file upload or through the API from a Third-Party Vendor that has completed the certification process with Metrc and the State.

Sales must be entered into Metrc daily on the day sales are made using the "Record Receipts" button for manual entries, or the "Import" button for CSV uploads.

## Manually Entering Sales

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

- 1**: Sale Date/Time (calendar icon, 02/01/2021, today)
- 2**: Time (07 : 56 PM)
- 3**: Package # 1 (search field: Type part of Package number..., clear button)
- 4**: Available (N/A)
- 5**: Add Package button (+ (package))
- 6**: Quantity input (1)
- 7**: Customer (Patient selected, Caregiver unselected)
- 8**: Patient No. (input field)
- 9**: Quantity dropdown (ex. 100.23, - Select -)
- 10**: Total Price (\$ ex. 100.23)
- 11**: Total Price input field
- 12**: Record Sales Receipts button
- 13**: Cancel button
- 14**: (clear) button

### Item 1: Receipt Date

The date of purchase from the receipt.

### Item 2: Time of Sale

The Time of Sale in hours and minutes.

### Item 3: Time of Day

Identifies whether the sale occurred in the am or pm hours.

### Item 4: Package Number

Package(s) from which product was distributed to the Patient.

### Item 5: Availability

Displays how much product remains in the existing Metrc package.

### Item 6: Add Package button

Use to add additional package information.

### Item 7: Add button

Use to populate information from a separate Sales Receipt while on the same screen.

### Item 8: Customer button

Identifies whether the customer was a patient or caregiver.

**Item 9: Patient Number**

The Patient Number or Caregiver Number box will appear, and you will enter the number of the person purchasing the product.

**Item 10: Quantity**

How much product the Patient purchased from the identified package(s).

**Item 11: Unit of Measure dropdown**

Select the Unit of Measure from the dropdown. The Unit of Measure must match the Unit of Measure of the source package(s).

**Item 12: Total Price**

Enter the Total Price for the product sold before tax and after any discounts.

**Item 13: Record Sales button**

Select Record Sales to save the information and exit the screen.

**Item 14: Cancel button**

Select to exit the screen without saving any changes.

**Item 15: Clear button**

Select to clear all entered information.

You can use the “Edit Receipts” button to edit the date and time, customer/patient information, and package/sales details.

# Sales Data Import

You will need the ability to associate the Metrc package ID number to one or more sku items in your POS to import Sales data via the API.

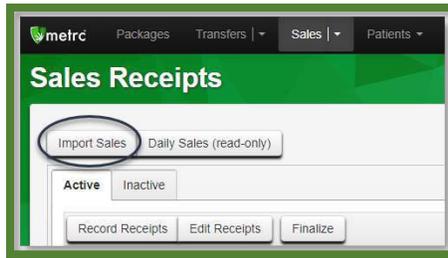
If they do not participate in the API (see the API Third Party Vendor list of companies who are certified to use the API with Merc at [www.metrc.com](http://www.metrc.com)), your Point of Sales vendor can help you export a CSV file from their system to your computer. You can then import that CSV file into Metrc.

If your POS vendor participates in the API, they can push this data to the software automatically.

CSV - Comma Separated Variable file or Comma Delimited file

## To use the CSV upload:

A sales upload from a common file type is available from the Sales function within a retailer. The file will need to be a test file separated by commas, commonly called a CSV file. This type of file can be created from an excel worksheet. The image below shows where to select the file. Once you have selected sales, select the "Import" button shown below. You should be able to create a CSV file from your existing Point of Sale system. Sales files should contain no more than 500 lines per file.



A new screen will open. Select the "Sales (new)" button and select the file to upload.



## Notes:

1. Please be sure to select the correct files before uploading
2. All uploaded files will be imported automatically
3. Once a file is uploaded, it cannot be removed
4. Once a file is imported, its data cannot be removed
5. Every single upload is tied to your current account and facility
6. Files are limited to 1MB (megabyte) in size
7. All files will be scanned by antivirus software

## Formatting your CSV Sales File for Upload

The CSV data fields for the upload are as follows:

Field	Format	Description
Sales Date/Time	YYYY-MM-DD HH:MM	Date and time of the actual sale
Sales Customer Type	Patient or Caregiver	Type of Sales Transaction
Patient Number	Numeric Value	State Provided Patient Number
Caregiver Number	Numeric Value	State Provided Caregiver Number
Package Label	Alpha-Numeric Value	Metric Package ID Number
Quantity	Numeric Value	Number of Units Sold
Unit of Measure	Numeric Value	ie: Grams, Ounces, Each
Total Amount (\$)	Numeric Value	Numeric Value, do not include "\$"

### New Sales Receipts:

Please remember, the CSVs cannot have a header, just the data. The file will need to be created without headers and with a separate row for each transaction, for example:

"2018-01-23 12:30","Patient","123456","654321","ABCDEF012345670000011229","5","Grams","20"

\*Please note that the commas are just to designate the next column in the file. These commas will NOT be placed in your file if you are using a .csv file/excel spreadsheet. If you are making a .txt file, then you WILL need the commas.

### Existing Sales Receipts:

Field	Format	Description
Metrc Receipt Number	Numeric Value	10 Digits
Sales Date/Time	YYYY-MM-DD HH:MM	Date and time of the actual sale
Sales Customer Type	Patient or Caregiver	Type of Sales Transaction
Patient Number	Numeric Value	State Provided Patient Number
Caregiver Number	Numeric Value	State Provided Caregiver Number
Package Label	Alpha-Numeric Value	Metrc Package ID Number
Quantity	Numeric Value	Number of Units Sold
Unit of Measure	Numeric Value	ie: Grams, Ounces, Each
Total Amount (\$)	Numeric Value	Numeric Value, do not include "\$"

#### Example:

"001234567","2018-01-23 12:30","Patient","123456","654321","ABCDEF012345670000011229","5","Grams","20"

\*Please note that the commas are just to designate the next column in the file. These commas will NOT be placed in your file if you are using a .csv file/excel spreadsheet. If you are making a .txt file, then you WILL need the commas.

#### Notes:

- If you are updating a previously uploaded entry, you will need to retrieve the receipt number from Metrc.
- If you receive an error upon upload, you may contact the Metrc Support Desk for assistance diagnosing the issue. Errors are usually due to missing or invalid data in the CSV file.
- All CSV files should be limited to no more than 500 lines per file.

# Finalizing Sales Receipts

It is recommended that users who report sales into the system finalize receipts in Metrc periodically. Finalizing the receipts will improve system performance in the sales receipts area and decrease the editing times for receipts if your active receipt total exceeds 50,000. This functionality is similar to the active/inactive area for packages.

## Sales Receipt Finalize and Unfinalize Buttons

The Sales Receipt section of Metrc was previously updated to include two new buttons: Finalize and Unfinalize. A new Finalized column (filterable) has been added to the Sales Receipt grid as well.

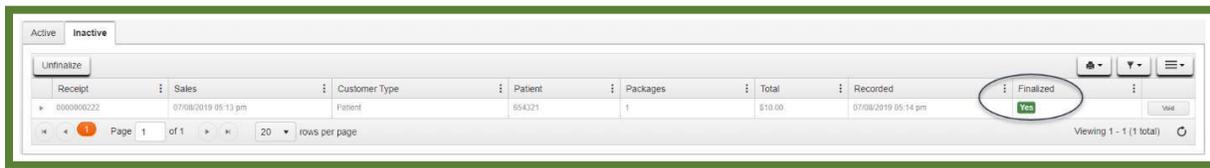


Figure 1: New Finalized Sales Receipt Field

When a receipt is no longer active, select the receipt and click the Finalize button. The following window will appear. Verify the receipt number and click the “Finalize Sales Receipts” button. **Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing. Larger Dispensaries may want to Finalize older Sales Receipts at a faster pace (e.g. on a weekly basis).**

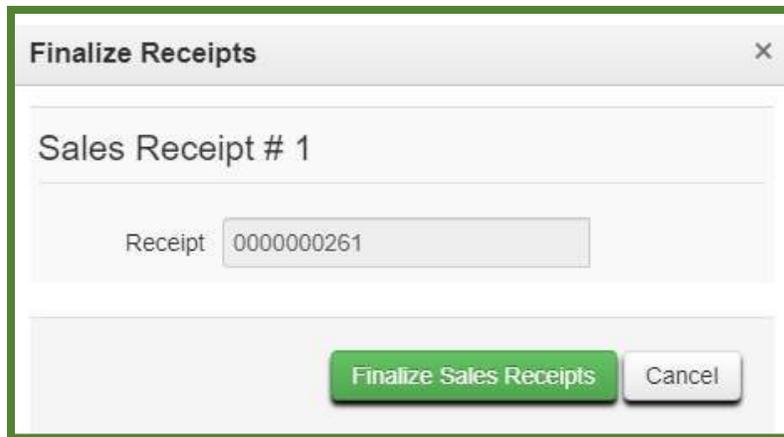


Figure 2: Finalize Sales Receipt Action Window

Finalizing sales receipts will remove the receipt from the list of active receipts Metrc pulls when you edit receipts, which will improve system performance.

**Note: Only those receipts not marked as “finalized” will display in the edit receipts window.**

If a “finalized” receipt later needs to be edited, utilize the Unfinalize button on the Sales Receipts grid. Select the desired receipt and click the Unfinalize button. The following window will appear. Verify the receipt number and click the “Unfinalize Sales Receipts” button.

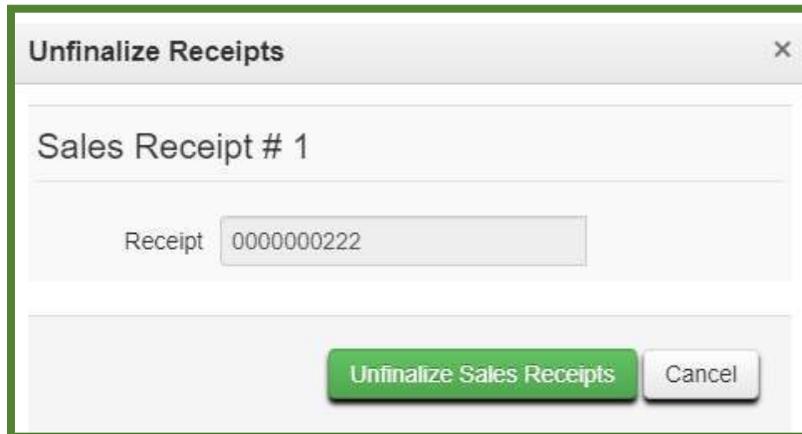


Figure 3: Unfinalize Sales Receipt

### Finalizing Multiple Receipts

Industry users can select multiple receipts and finish them at one time. To do this click and drag to select multiple receipts, then select the finalize button.



Figure 4: Highlight Multiple Receipts for Finalization

**Note:** *When finalizing multiple sales receipts at once, an industry user should limit the process to 100 receipts at a time.*

This will prompt an action window where the industry user will confirm the receipt finish dates and select the “Finalize Sales Receipts” button to complete the finalization.

The image shows a software dialog box titled "Finalize Receipts" with a close button (X) in the top right corner. The dialog contains five sections, each for a sales receipt. Each section has a label "Sales Receipt # [number]" and a text input field labeled "Receipt" containing a 12-digit number. The receipt numbers are 0000000272, 0000000271, 0000000261, 0000000260, and 0000000259. At the bottom of the dialog, there are two buttons: a green "Finalize Sales Receipts" button and a grey "Cancel" button.

Sales Receipt #	Receipt Number
Sales Receipt # 1	0000000272
Sales Receipt # 2	0000000271
Sales Receipt # 3	0000000261
Sales Receipt # 4	0000000260
Sales Receipt # 5	0000000259

**Figure 5: Finalize Multiple Sales Receipts**

## Common Metrc Acronyms

1. **API** - Application Programming Interface
2. **CSV** - Comma Separated Variable file
3. **METRC** - Marijuana Enforcement Tracking Reporting Compliance System
4. **POS** - Point of Sale System
5. **TPV** - Third Party Vendor

# Metrc Support

Support Materials (available through the software 24x7x365)

1. This State Supplemental Guide
2. Metrc Manual/User Guide
3. CSV Uploads Guide
4. Metrc Reports Guide

Interactive Support Team

1. Email - **support@metrc.com**
2. Phone - **877-566-6506**
  - Monday - Friday: 10 am – 9pm Eastern Standard Time
  - Saturdays: 10 am – 8 pm Eastern Standard Time
  - Sundays: Voicemail & Email Only

Training - sign up for training through the Metrc website ([www.metrc.com](http://www.metrc.com)) or by navigating to “Sign up for Training” under the Support Tab on the navigation bar in the software.

To sign up from your Metrc account:

1. Click on Support in the right-hand options on the navigation bar.
2. Click on “Sign up for Training”.
3. In the new window, click on the date you would like to attend a specific training and fill out the registration information.

To sign up from [www.metrc.com](http://www.metrc.com)

1. Click on “States” on the navigation bar and select the appropriate state.
2. Click on the “Schedule Training Now” button.
3. Click on the date you would like to attend a specific training and fill out the registration information.