Metrc Support Bulletin

Bulletin Number: CA_IB_2020_007	**Distribution Date**: 2/28/2020	**Effective Date**: 2/29/2020
Contact Point: Metrc® Support	**Subject**: New Features in the California Cannabis Track and Trace system (CCTT-Metrc)	
Reason: To provide information on new features in CCTT-Metrc		
Primary Audience: All licensees		

The bulletin provides information on the latest enhancements to CCTT-Metrc, which will become effective on February 29, 2020. The enhancements are listed below. Detailed descriptions of each change are provided on the following pages.

    I.   Any licensee may designate cannabis or cannabis products that they hold in their inventory for donation.

    II.   Users authorized to manage package inventory will see several new enhancements around the New Package(s) process.

    III.   An *In Transit* tab has been added to the *Packages* page.

    IV.   A *Notes* column has been added to the *Lab Results* grid to display notes added by the testing laboratory.

    V.   The transfer manifest is now limited to a single destination and a single transporter.

    VI.   Transporters have access to a new *Distributor Completed Manifest* button on the *Transfers Hub* to be used to acknowledge that they have verified and received all items in the shipment prior to departing from the licensed premises.

    VII.   Licensees that are shipping packages are able to update the transporter information for the return trip if a package is rejected.

    VIII.   Transporters are able to acknowledge receipt of rejected packages, update estimated departure and arrival times, and record departure and arrival times for the return trip.

    IX.   The *Transfers Hub* has new icons within the grid for visual indicators on the direction and point of delivery for a transfer.

    X.   Transfer manifests are color-coded according to the status of each transfer.

    XI.   The transfer manifest includes item-specific details and source package information for each package where applicable.

    XII.   Users with the ability to add, edit, and assign *Rooms* will now see the term "Room" has been updated to "Location" throughout the application.

    XIII.   Users with plant permissions have the ability to take corrective action on incorrect harvest waste entries by discontinuing the waste, which returns the weight to the harvest batch.

    XIV.   All grids in CCTT-Metrc have a *Filter* button to remove multiple filters within the grid at one time.

    XV.   Users have expanded ability to specify the number of items to create on a page.

    XVI.   Row count restrictions have been implemented on CSV uploads.

    XVII.   The Support menu includes a new *CSV Formatting Guide*.

Metrc Support Bulletin

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Packages

Donations of Cannabis and Cannabis Products

Any licensee may designate cannabis or cannabis products that they hold in their inventory for donation in CCTT-Metrc. Licensees cannot remove the donation designation made by another licensee or after the donated item has been transferred and accepted into the inventory of another licensee.

Marking Donations

To designate an existing package of cannabis or cannabis products for donation, on the *Packages* page:
1. Select the package to designate.
2. Select the *Donation* button, and then select *Add* as shown in **Figure 1**.
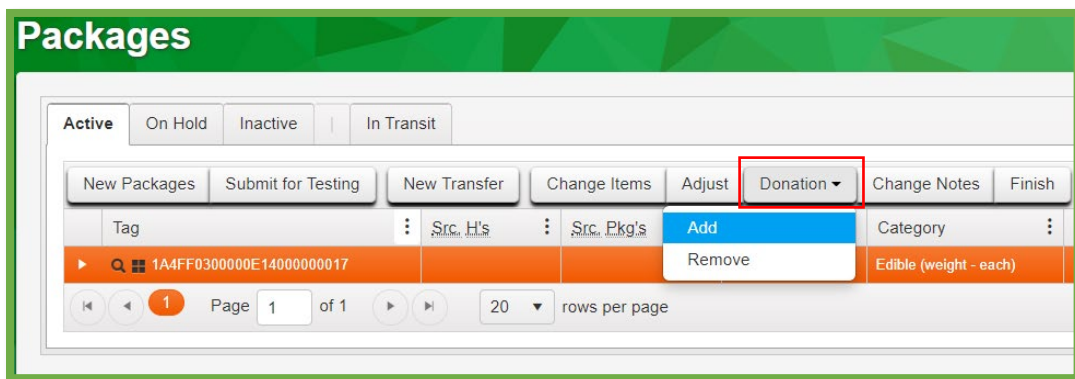

Figure 1: Marking an Existing Package for Donation

To designate cannabis or cannabis products for donation when creating a package on the *New Packages* page, check the *Donation* checkbox, as shown in **Figure 2**.
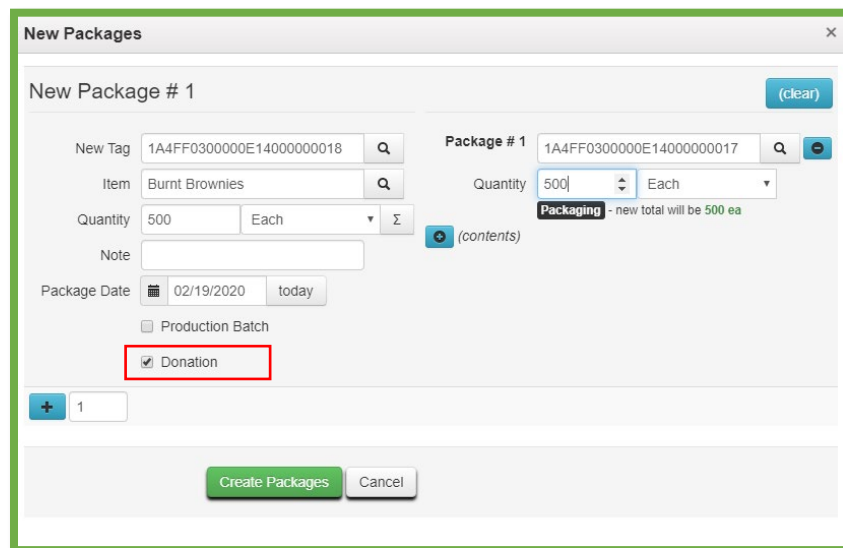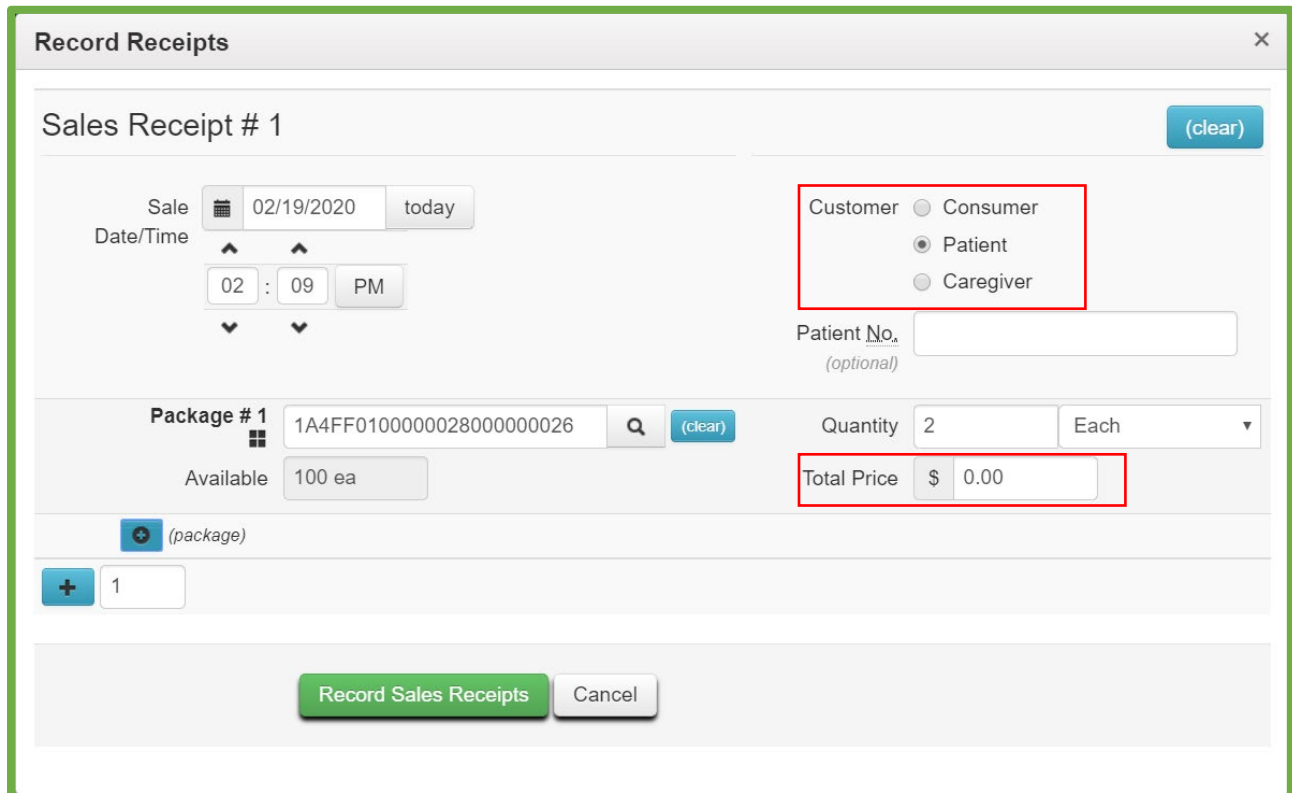

Figure 2: Marking a New Package for Donation

Entering Sales of Donated Cannabis or Cannabis Products:

To enter a cannabis goods sale as a donation to a medicinal cannabis patient or their primary caregiver, the licensed retailer must enter the *Total Price* of the sale of the designated cannabis goods package as $0.00 and indicate the customer type as *Patient* or *Caregiver*, on the Records Receipts page.

Figure 3: Marking a New Package for Donation

Removing the Donation Designation:

Only the licensee who designated a package for donation can remove the donation designation, but they can only do so if the donated package has not yet been transferred and accepted into the inventory of another licensee.

To remove a donation designation from a package of cannabis or cannabis products, on the *New Packages* page:

1. Select the package with the donation designation (identified with a gift package icon 🎁).
2. Select the *Donation* button, and then select *Remove* as shown in **Figure 4**.
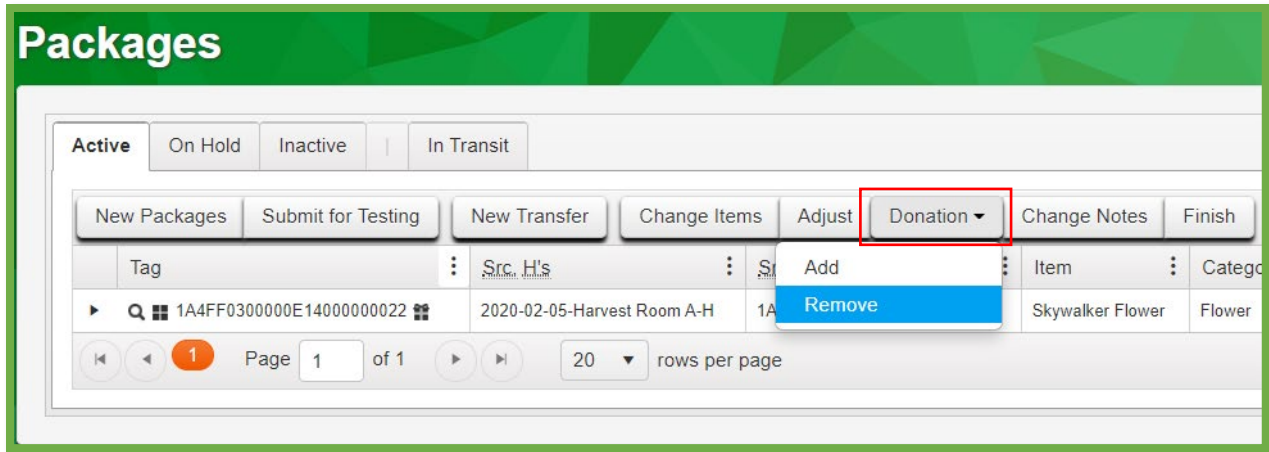
Figure 4: Removing the Donation Designation

New Packages:

When the source package is designated for donation, all new packages created from it must also be designated for donation. Packages marked for donation cannot be combined with any other packages when creating a new package.

Remaining Quantity in Source Package

The remaining quantity of a source/content package(s) in the *New Packages* action window will now take into account all other *New Package* entries for that same source/content package. In the past, using a package multiple times would subtract the amount used from the package's quantity independently. A user will now see the true total remaining quantity when the same package is used multiple times to create new packages. For example, **Figure 5** shows the new remaining quantity is 7605.5g when the source/content package is used to make one 100g package. **Figure 6** shows the new remaining quantity is 7505.5g when the source/content package is used again to make a second 100g package.
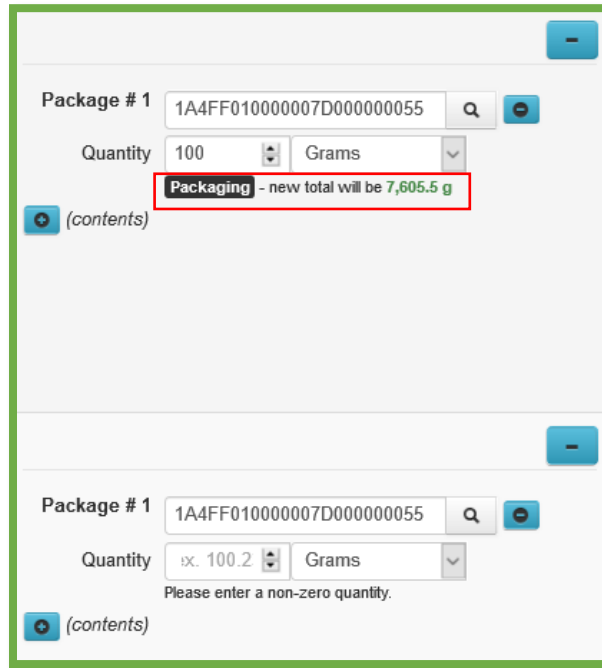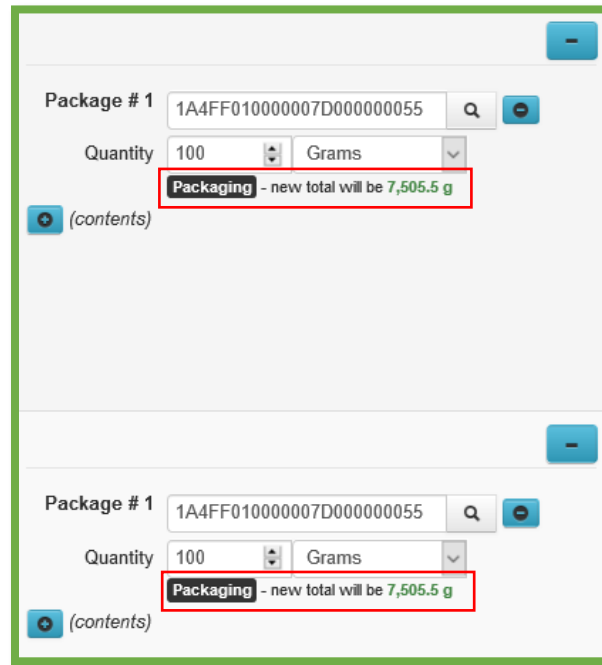
Figure 5: Remaining Quantity in Source Package

Figure 6: Remaining Quantity Removing Total Amount Deducted

Finish Package When Creating New Packages

If the remaining quantity of a source/content package is calculated to be zero (0) when creating a new package, the user will now be able to finish that source package at the same time as creating the new package(s). **Figure 7** below shows an example of finishing a source package when creating a new package. Once the user has marked the *Finish Package* checkbox, identified a *Finish Date*, and selected the *Create Packages* button, the source package moves to the *Inactive* tab.
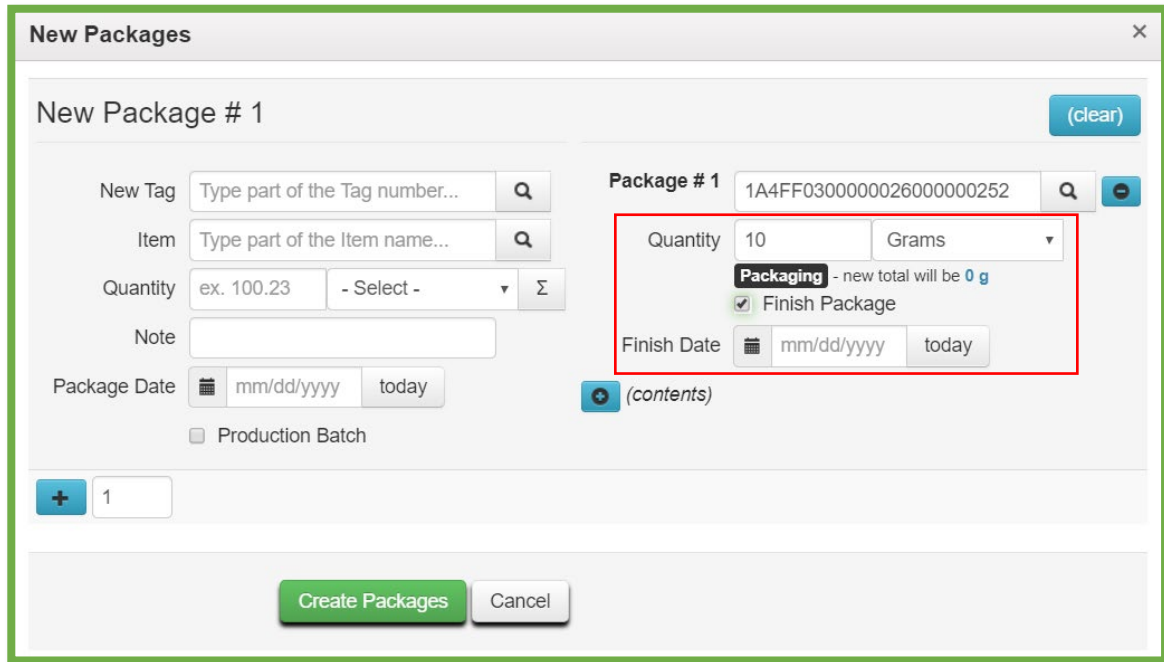

Figure 7: Finishing a Source Package

Auto-Sum Quantity in New Packages Template

Users now have a new button within the *New Packages* template that allows all new package quantities to be "Auto-Summed" based on the quantity removed from the source package. This button, shown in **Figure 8,** functions exactly as the *Auto-Sum* button does for each individual new package. Meaning, if a licensee has one source package of one hundred (100) cookies and wants to create ten (10) packages of ten (10) cookies each, the quantity removed from the source package would be set to ten (10) each for all ten (10) new packages. When selected, the *Auto-Sum* button populates the quantity of each new package with ten (10) each/cookies.
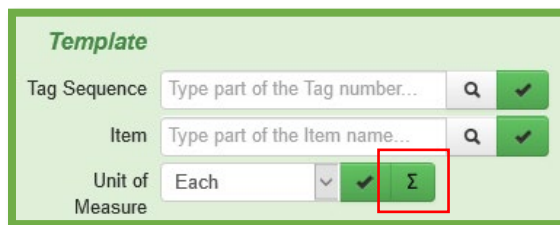

Figure 8: Auto-Sum Button in New Packages Template

New and Updated Item Categories

The following _New_ item categories have been added:

    a.   Flower (packaged gram - each)

    b.   Flower (packaged eighth - each)

    c.   Flower (packaged half ounce - each)

    d.   Flower (packaged ounce - each)

    e.   Flower (packaged quarter - each)

    f.   Infused Butter/Oil (weight)

    g.   Infused Butter/Oil (weight - each)

    h.   Tincture (weight)

    i.   Tincture (weight - each)

    j.   Vape Cartridge (weight - each)

The following _Existing_ item categories have been updated:

    a.   Changed Infused Butter/Oil to Infused Butter/Oil (volume)

    b.   Changed Infused Butter/Oil (each) to Infused Butter/Oil (volume - each)

    c.   Seeds has been updated to require a strain

    d.   Seeds (each) has been updated to require a strain

    e.   Changed Tincture to Tincture (volume)

    f.   Changed Tincture (each) to Tincture (volume - each)

    g.   Changed Vape Cartridge to Vape Cartridge (volume - each)

It is important to note that available item categories vary according to license type.

Same Item Option When Creating New Packages

Users have a new _Same Item_ checkbox option when creating a new package from an existing package as shown in **Figure 9**. Checking _Same Item_ will assign the same package item from the source package. This option allows licensees who receive packages of an item not previously configured for their license to repackage and create lab sample packages using the same item name from the source package. Using the _Same Item_ feature does not add the item to the list of items for that license.
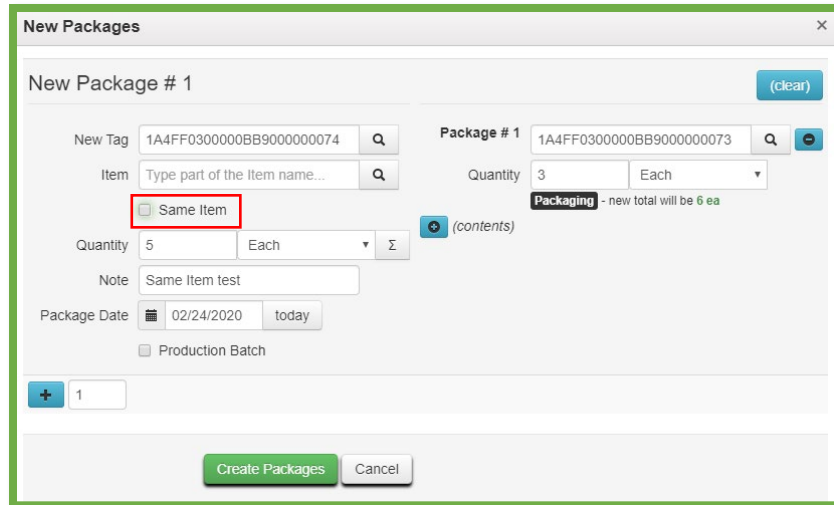
Figure 9: Same Item Checkbox

New In Transit Tab

Users with the *View Packages* permission have access to a new *In Transit* tab on the *Packages* page as pictured in **Figure 10**. The *In Transit* tab allows users to easily view/search packages currently in an active Outgoing Transfer or in an active Rejected Transfer.
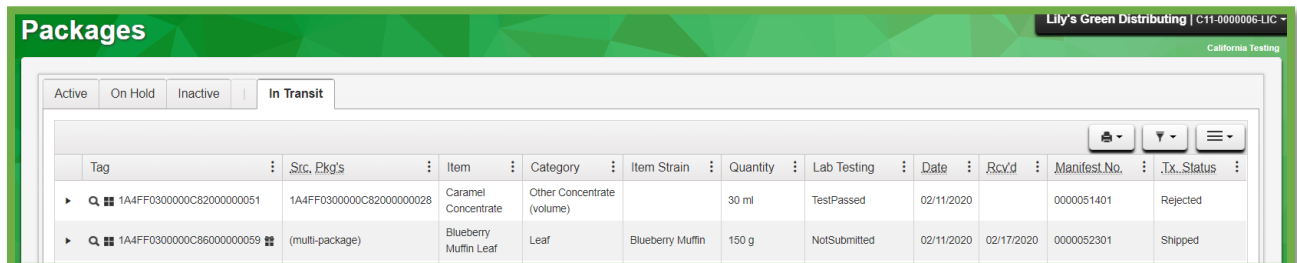

Figure 10: In Transit Tab

New Column for Notes on Lab Results Tab

The existing *Lab Results* tab within the Package drilldown has been updated to include a column that displays the notes that are entered by the lab when recoding test results. *Notes* are specific to each test result for each sample package. The *Notes* column displays up to 25 characters followed by three dots in a row, as pictured below in **Figure 11**. If the user clicks on the three dots in a row, the note will expand and display as seen in **Figure 12** below.

Figure 11: Notes Field added to Packages/Lab Results Tab

This is a note. Once 25 characters has been included you will see elipses
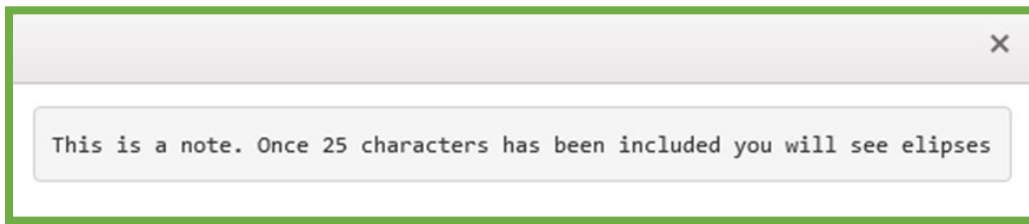
Figure 12: Note Expanded

Transfers

Single Destination and Single Transporter Transfers

The transfer manifest is now limited to a single destination and a single transporter. Licensees need to create separate transfer manifests for each destination. Licensees will receive an error when attempting to edit an existing Transfer or use an existing Transfer Template with more than one destination and/or transporter.

Distributor Completed Manifest Button

Users that have access to the *Transfers Hub* in CCTT-Metrc will notice a new *Distributor Completed Manifest* button for each active transfer. California requires transporters to use this button to acknowledge that they have verified and received the items on the Manifest prior to departing the shipping facility. Please see **Figure 13** below.
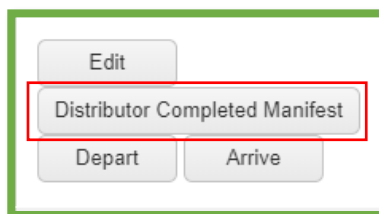

Figure 13: Distributor Completed Manifest Button in Transfers Hub

Outbound Transfers and Return Transfers

Outbound Trip

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

A licensed transporter selected by the shipping licensee to transfer the packages can view the transfer information from the *Transfers Hub*. The *Transfers Hub* includes buttons for transporters to report the progress of each transfer as shown in **Figure 13** above.
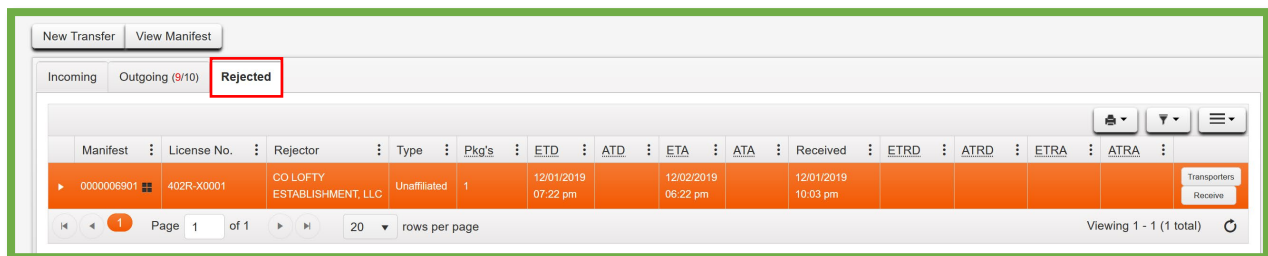
The use of each button is outlined below.

- The *Edit* button allows a transporter to update Estimated Departure and Arrival times.
- The *Distributor Completed Manifest* and *Depart* buttons are designed to be used when a transporter accepts custody of the packages for delivery and then departs the originating facility.
- The *Arrive* button indicates the transporter arrived at the destination facility.

It is also important to note the following when using these buttons:

- The buttons pictured in **Figure 13** above are applied in chronological order. For example, if the *Arrive* button is clicked prior to the *Depart* button, the *Depart* button will no longer be displayed and no date/time can be recorded for the departure.
- If a transporter does not select any button during their route and the manifest is received by the destination facility, these buttons are no longer available for selection by the transporter.

Return Trip

If the destination facility rejects a package in the transfer, the originating facility has access to the return manifest under the *Rejected* tab as pictured in **Figure 14**.

Figure 14: Rejected Transfers Grid

A new *Transporters* button displays for each rejection on the *Rejected* transfers grid as pictured in **Figure 15** below. This button allows the originating licensee to update details of the return trip, including transporter information as pictured in **Figure 16.**
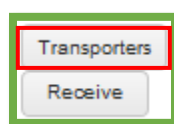

Figure 15: New Button to Update Return Trip Information for Rejected Transfers
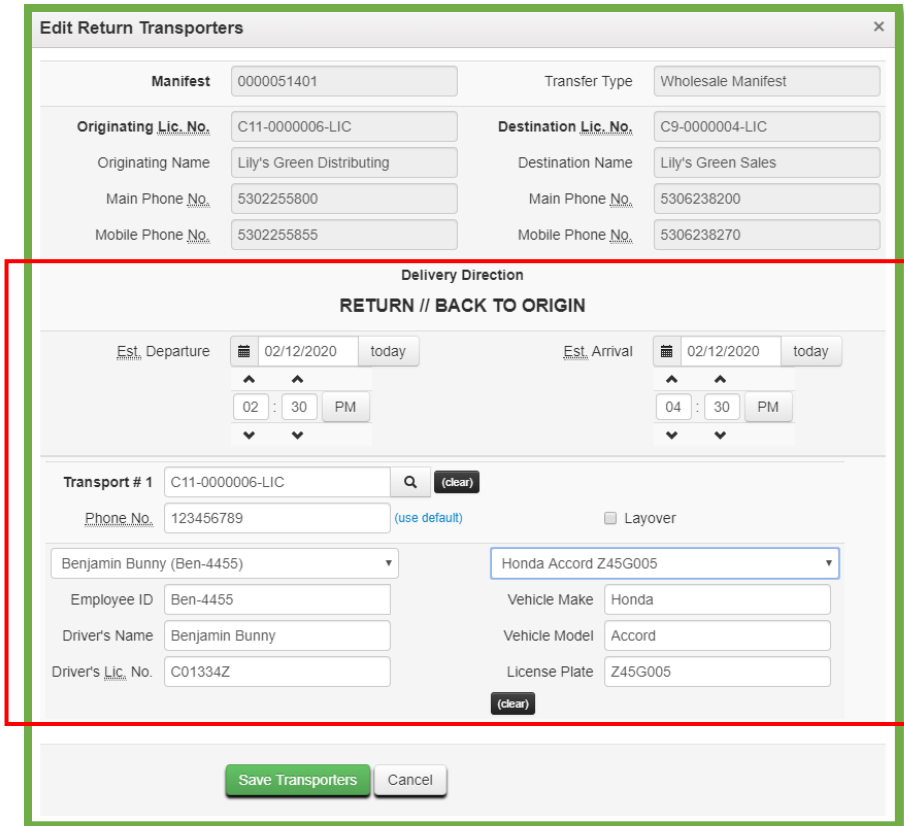
Figure 16: Updating Return Trip Information on Rejected Transfers Tab

Once modified, the return transporter will have access to the manifest under the *Transfers Hub,* including the *Distributor Completes Manifest*, *Depart*, *Arrive* and *Edit* buttons described above to record transporter activities for the return trip.

New Transfers Hub Icons and Direction Column

Transporters with access to the *Transfers Hub* in CCTT-Metrc will see a new icon and column outlined in **Figure 17**. The icon identifies the point of delivery for each transfer and the new *Direction* column indicates the direction (Outbound or Return) of the trip.

Figure 17: Transfers Hub Grid

Transfer Manifests Color-Coding Transporters and Packages

Transfer Manifests in CCTT-Metrc are color-coded according to the status of each transfer in the system. "Outbound" and "Return" transporters are color-coded to indicate the direction of the transfer. Outbound transporters have light green shading, while Return transporters have light red (or pink) shading as shown in **Figure 18**.

Any in transit package, meaning the package has not been received or rejected, has light gray shading. Once the destination facility takes an action to receive or reject a package, the package status on the manifest is 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 have a status of "Returned" with light red (or pink) shading.

1. Outbound Transporter	Cannabis Connection	No Layover Scheduled		
Transporter License Number	A11-0000002-LIC			
Address of Transporter	7899 Warehouse Way Tracy, CA 95287 County: San Joaquin County			
Contact Phone No. for Inquiries: 1234567890				
Name of Person Transporting	Joe Smith	Employee ID of Driver	Joe.Smith@Cannabis.Connect.com	
State Driver's License No.	C387198721	Signature of Person Transporting		
Make, Model, License Plate No.	Ford Explorer CANCON2			
2. Return Transporter	Cannabis Connection	No Layover Scheduled		
Transporter License Number	A11-0000002-LIC			
Address of Transporter	7899 Warehouse Way Tracy, CA 95287 County: San Joaquin County			
Contact Phone No. for Inquiries: 1234567890				
Name of Person Transporting	Joe Smith	Employee ID of Driver	Joe.Smith@Cannabis.Connect.com	
State Driver's License No.	C387198721	Signature of Person Transporting		
Make, Model, License Plate No.	Ford Explorer CANCON2			
1. Package | Accepted	**Production Batch No.**	**Item Name**		**Quantity**
1A4FF0300000026000000238 Lab Test: TestPassed		Girl Scout Flower (Flower)		Shp: 100.0000 kg Rcv: 100.0000 kg
Item Details	Strain: Girl Scout Cookies (GSC)			
Source Package(s)	1A4FF0300000026000000237			
2. Package | Rejected	**Production Batch No.**	**Item Name**		**Quantity**
1A4FF0300000026000000229 Lab Test: TestPassed		Yabba Dabba Doo Concentrate (Other Concentrate (volume))		Shp: 0.5000 l
Item Details				
Source Package(s)	1A4FF0300000026000000212			

Figure 18: Color Coded Manifest Layout Example

Additional Information on Transfer Manifests

When registering and receiving transfers, users will now see that the Transfer Manifest provides additional information about the packages included on the manifest. Each package now includes the item details (Strain, Unit Weight, Unit Volume, etc.) and source package information as shown in **Figure 19** below.

1. Package | Accepted	**Production Batch No.**	**Item Name**	**Quantity**
1A4FF0300000E1A000000144 Lab Test: NotSubmitted		Skywalker Flower (Flower)	Shp: 9.9950 kg Rcv: 9.9950 kg
Item Details	Strain: Skywalker		
Source Harvest(s)	2020-02-05-Harvest Room A-H		
Source Package(s)	1A4FF0300000E1A000000137, 1A4FF0300000E1A000000138		

Figure 19: Additional Details on Transfer Manifest

Plants and Harvests

Rooms Renamed to Locations

Licensees with the ability to add, edit and assign *Rooms* will see the term *Room* has been renamed to *Location* throughout the system. For example, users with Admin permissions to add and edit rooms will now see *Locations* (formerly Rooms) on the *Admin* menu where they can *Add Locations* (formerly Add Rooms) and *Edit Locations* (formerly Edit Rooms) as shown in **Figure 20**. All cultivator licensees will see a default *Location Type* assigned to all existing locations and new locations.
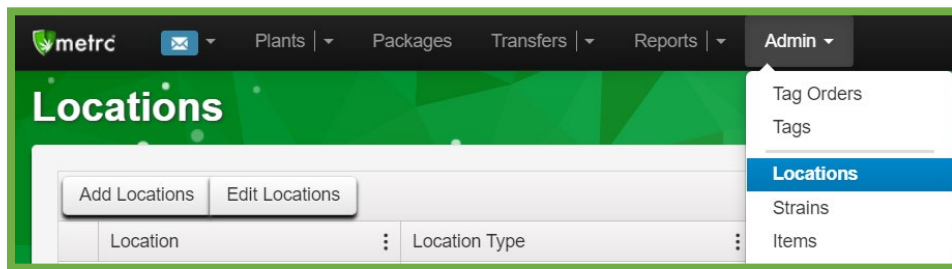

Figure 20: Rooms Renamed to Locations

All cultivator licensees with the ability to assign plants to rooms will now see a *Location* column on all *Plants* grids and a *Location* field on all *Plants* pages as shown in the **Figure 21** example below.
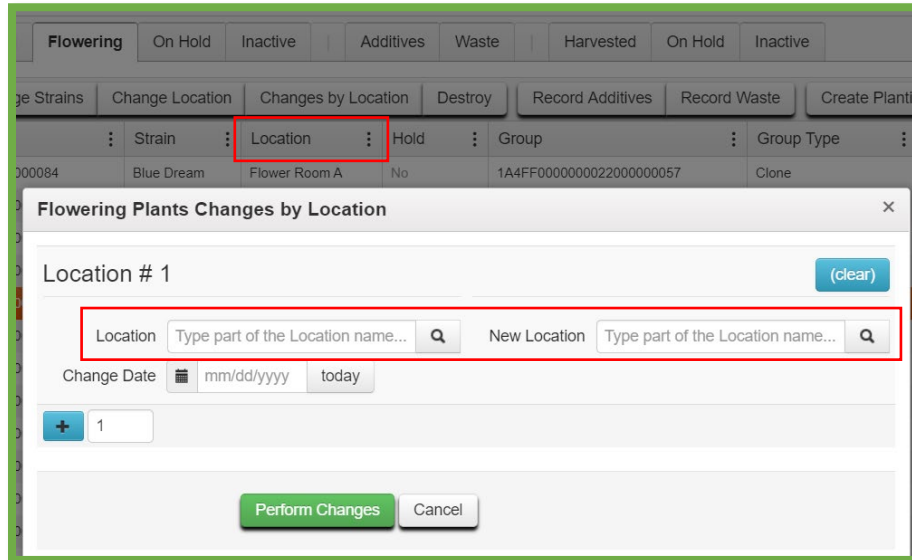

Figure 21: Location Column and Fields on Plants Grids and Pages

Discontinuing Harvest Waste

When drilling down into a harvest batch, users can now toggle to the *Waste* tab and find a new discontinue (✖) button next to each waste entry as seen in **Figure 22**. Once the discontinue button is selected, a confirmation box (as shown in **Figure 23** below) displays for the user to confirm the action. When the *OK* button is selected, the waste entry is removed and the waste weight is added back into the weight of the harvest batch.
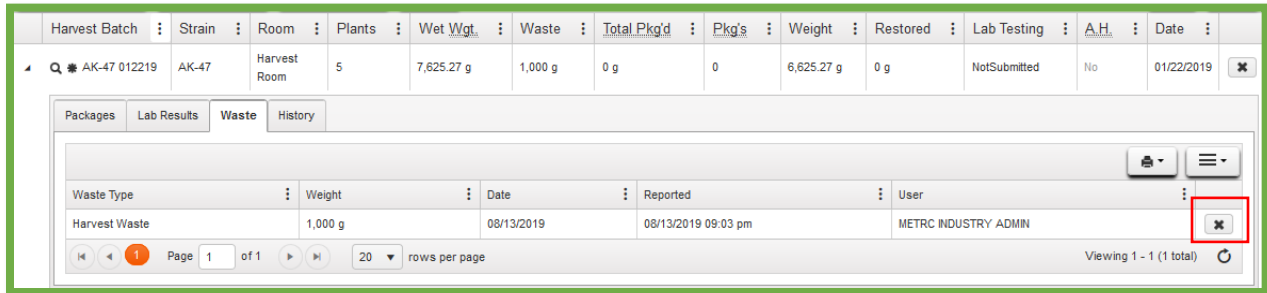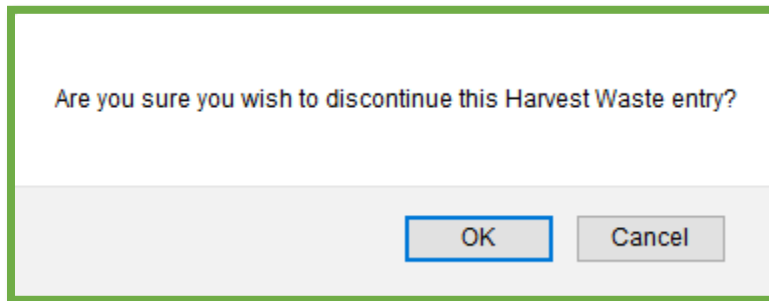

Figure 22: Discontinuing Harvest Waste

Figure 23: Confirming Discontinuation of Harvest Waste

Application-Wide Features

Filters Button

Users will now have a new *Filters* button, as seen in **Figure 24**, on the right-hand side of all grid toolbars. Clicking the *Filters* button displays a drop-down menu with a *Clear Filters* option. Clicking *Clear Filters* removes all applied filters from the grid.
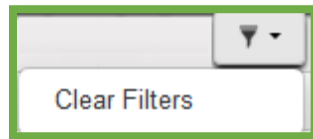

Figure 24: Filters Button

Placing the mouse over the *Clear Filters* button, as shown in the example in **Figure 25** below**,** displays all currently applied filters.
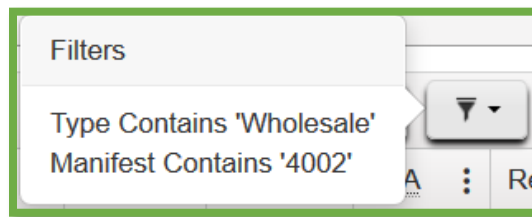

Figure 25: Hovering over Filters Button

Adding Multiple Rows

The ability to specify the number of rows to add has been expanded to all action windows within CCTT-Metrc. Users can enter a value into the field next to the + icon as shown in **Figure 26**, and then select the + icon to add that number of rows for creating multiple items at one time.
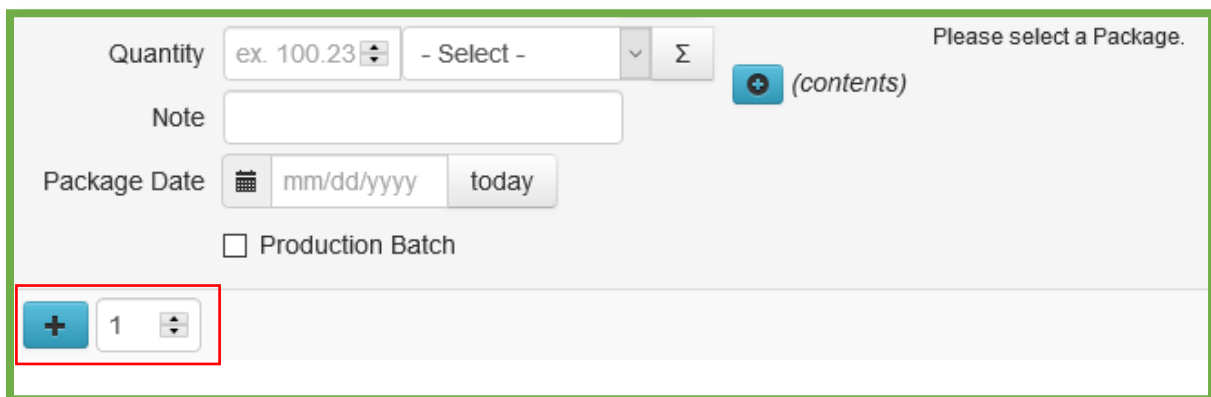

Figure 26: Plus X Addition

CSV Uploads

CSV Row Count Restrictions

CCTT-Metrc processes all records in a CSV file as a single upload transaction. Before storing any data, each record is reviewed to make sure there are no errors (such as a data type mismatch or the wrong number of values). If any record in the file generates an error, the upload is rejected. CCTT-Metrc will report each error and the row on which it occurred. The user must then modify the CSV file and retry.

With this information in mind, CCTT-Metrc now enforces a maximum of 500 rows for each CSV file uploaded into the system. If this maximum is exceeded, the data can be split into separate files with unique names that do not exceed the 500 row maximum. When adding plants to the same harvest or manicure batch using multiple CSV files, it is recommended that they be uploaded one file at a time.

The exception made at this time to the 500 row maximum is for recording lab test results. There is currently no maximum limit set for uploading lab results using the CSV import.

This limitation applies only to CSV imports and does not apply to data interfaced through the API.

New User Guide

A *CSV Formatting Guide* has been added to the *Support* dropdown menu as shown in **Figure 27** below.
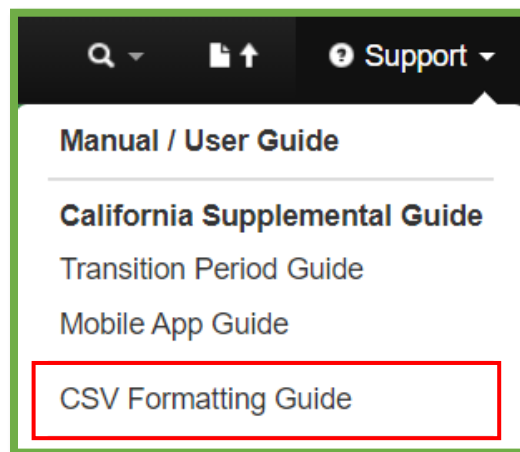

Figure 27: Support Menu

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