

Bulletin Number: NJ IB 0028	Distribution Date: 12/05/2024	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Home Delivery Utiliz	ting Class 6 Delivery Licensee
Reason: Providing information r the services of a Class 6 Deliver	egarding home delivery when a y licensee.	a Class 5 Retailer is utilizing

Greetings,

In conjunction with the New Jersey Cannabis Regulatory Commission (CRC), Metrc is providing information on the process for **Class 5 Retailers** to utilize the services of a **Class 6 Delivery** licensee to complete home sales deliveries.

Note: Home Deliveries direct to consumers must be registered in Metrc as "Sales Deliveries" and are tracked separately from onsite sales at the **Class 5 Retailer** which are registered as "Sales Receipts".

The following steps will be outlined in this bulletin. Please note color-coding used to help delineate between the two licensee types.

- Class 5 Retailer Creates Sales Delivery
- Class 6 Delivery Delivers Sales Delivery
- Class 5 Retailer Completes Sales Delivery
- How to Document a Rejected Sales Delivery

Class 5 Retailers may reference <u>New Jersey Industry Bulletin #19</u> for more information about home Sales Deliveries when self-delivering (*not utilizing Class 6 Delivery licensee*).

Please read on for more information.



Employee Permissions for Sales Delivery

Class 6 Delivery employees who will report transporter activity must be granted appropriate permission to complete those actions. These permissions can only be granted by a user with administrative permissions.

To grant permission to an employee, go to the Admin area on the navigational toolbar, then select the Employees option from the drop-down to access the Employees grid – **see Figure 1**.

					-		
Employees	•					Tag Orders Tags	
Add Employees	Edit Employ	ees Lock Unlock				Locations Strains	
License No.	: L	ast Name	÷	First Name	E	Items	
				1	E	Transporters	
					ſ	Employees	

Figure 1: Accessing the Employees grid from Admin drop down

Once on the Employees grid, select the Employee that needs to be granted permission by highlighting them and click on the Edit Employees button to open the Edit Employees action window – **see Figure 2**.

Add Employees	Edit Empl	oyees Lock Unlock	1			
License No.	:	Last Name	:	First Name	E-mail	
X00420		INDUSTRY ADMIN		METRC	support@metrc.com	

Figure 2: Edit Employees button in the Employees grid



From the Edit Employees action window, locate the Sales Menu part of permissions. The **Hub** options grant access to the Sales Delivery Hub grid and/or permissions to manage – **see Figure 3**.

Check the View or Manage checkbox to the right of each permission that the user is being granted. Once all permissions have been updated, click the Save Employees button to save the permissions that have been granted.

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Figure 3: Sales Menu Permissions Options



Class 5 Retailer Creates Sales Delivery

The sales delivery process is initiated by the Class 5 Retailer licensee. The creation of a Sales Delivery Manifest must be created by the Class 5 Retailer once an order has been placed by the customer. These manifests provide necessary documentation when products are being transported off a licensed premises.

To begin the process, the Class 5 Retailer navigates to the Sales Deliveries grid by selecting the Deliveries option under the Sales area dropdown on the navigational toolbar – **see Figure 4**.



Figure 4: Sales Menu with Deliveries option

From the Sales Deliveries grid, select the Record Deliveries button. This will open the Record Deliveries action window so the Sales Delivery can be created – **see Figure 5**.

ales	Delive	eries	5					
Active	Inactive							
Recor	d Deliveries	Edit De	eliveries	iew Manifest				
D	elivery	:	Transporter	:	Sales	:	Customer Type	:

Figure 5: Record Deliveries button

In the Record Deliveries action window, the Class 5 Retailer enters the details of the Sales Delivery. Click the magnifying glass icon by the Transporter Facility field to find the Class 6 Delivery licensee who will be delivering the sale, then click the Select button – see Figure 6 below.

|--|

ales Delive	ery # 1			
Sale Date/Time	 11/20/2024 	today	Consumer Id Name	Receipt #
	01]: 52	PM		
st. Departure	11/20/2024	🗂 today	<u>Est</u> Arrival	E 11/20/2024 today
	02 : 52 ♥ ♥	PM		02 : 32 PM
lanned Route	Turn Left Turn Right		Address	123 Mein Street
		Select		*
Transporter Facility	Tipe part of the Licen	License No.	Legal Name	Image: Type Image: Address Image: Main Phone Image: Mobile Phone Image: Type
	6	CRC0007-T	Acme Transporter	Adult Use Delivery 100 Fast Lane Way Cape May, NJ 8204 732-555-5555
Employee ID	Type part of the Drive	H A Pa	ge 1 of 1 🕞	N N To v rows per page Viewing 1 - 1 (1 total)
Driver's Name		Select Cancel		
Phone No. for	ex. +1-123-456-7890		-	

Figure 6: Select Transporter Facility in Action Window

Note: The Consumer ID field should be populated with the receipt number from the transaction once it has been completed. To initially record the delivery, input "Receipt #" in the Consumer ID field as a placeholder.

Complete the Driver and Vehicle fields by entering information manually or by selecting from the list of saved Drivers and saved Vehicles using the magnifying glass icon. When all fields are completed on the Record Deliveries action window, click the green Record Sales Deliveries button – **see Figure 7 below**.



Transporter Facility	CRC0007-T	٩	County (optional)						
			State + Zip NJ v	01234					
Driver 1	John	Q (clear)	Vehicle 1 Type part of	of the vehicle make.	moc Q				
Employee ID	Doe		Vehicle Make Honda						
Driver's Name	John		Vehicle Model Civic						
river's <u>Lic.</u> No.	XYZ555		License Plate CRC-1234						
Phone No. for Questions	555-555-5555								
	Package # 1	144FE0100000C90000000	17 Q (GRan)	Quantity	35	rams	Max		
	Available	352 0		Total Price	\$ 80.00 C		max		
► Tri	ansaction Details								
(pa	ckage)								
+ 1 0									
+ 1 0									
+ 1 0	Record	Salas Deliverias	ì						
+ 1 🗊	Record	Sales Deliveries Cancel)						
+ 1	Record	Sales Deliveries	J						

Figure 7: Enter or Select Driver and Vehicle Info

The Sales Delivery will now show in the Class 5 Retailer grid with a State of Shipped. The Transporter column shows which Class 6 Delivery licensee is intended to deliver the Sales Delivery – **see Figure 8**.



Figure 8: Class 5 Retailer Created a Sales Delivery Intended for Transport by a Class 6 Delivery Licensee



Class 6 Delivery Delivers Sales Delivery

When using a Transporter, the Class 6 Delivery licensee takes the following steps to do the Sales Delivery that was initiated by the Class 5 Retailer. The Class 6 Delivery licensee begins their process on the Sales Delivery Hub screen from the Sales menu in Metrc – **see Figure 9**.

es Deliv	ery Hu	D D	elivery Hub											1								New Jersey Te	a Dag
ew Manifest																				e-	¥•	=-	
Delivery	Sales I	Customer Type	Destination	Direction	Driver	Vehicle Info	E Phata	: Accepted	: ETD	: 4	I AT	ETA :	ATA :	ETRO	: ATRO	: ;	TRA	ATRA	: D.Verifi	ed :	Рах	1	
000000121	11/20/2024 01:52 pm	Consumer	Street: 123 Main Street Street2: City: Trenton State: NJ Poetar Code: 01234	+ Outbound	John	Male: Honda Model: CMo Lio: Plate: CRC-1234	1		11/20/2 02:52	1024 em		11/20/2024 02:32 pm							No			Ect Accept	3

Figure 9: Sales Delivery Hub in the Sales Menu

Note: The Class 6 Delivery licensee has the ability to edit relevant fields in Sales Delivery by clicking the Edit button in the right column **as shown in Figure 10**. This is an important function if the delivery driver needs to change details such as:

- Driver's name/info
- Vehicle info
- Estimated departure time
- Estimated arrival time
- Planned route

To accept the delivery, the Class 6 Delivery licensee selects the row of the delivery and clicks the Accept button in the right column – **see Figure 10**.

les Deliv	ery l	lub		Delv	eries very Hub							Ц.	à				~			_	Acme	Transporter Nex	CRC0007-T Arsey Texting
View Manifest																					e- 1	•][=•	4
Delivery	: Sales	:	Customer Type	1	Destination	Direction	E Driver	: Vehicle Info	: Phota	Accepted	ETD	: /	TR I	ETA	: ATA	ETRR	: ATRO	: ETRA	: ATRA	: D.Verified	: Pay	1	_
000000121	11/20/20 01:52 pr	24	Consumer		Street: 123 Main Street Street2 City: Trenton State: NJ Drafer Crafe 01234	→ Outbound	John	Male: Honda Model: CMo Llo: Plate: CRC-1234	1		11/20/2 02:52 p	024 m		11/20/2024 02:32 pm						No			Est Accept

Figure 10: Edit Button and Accept Button in right column of Sales Delivery Hub



Once the Accept button has been clicked by the Class 6 Delivery licensee, the Accepted time will be registered in the appropriate column of the Sales Delivery Hub grid. This action also reflects a state of "Accepted" on the Sales Deliveries screen for the Class 5 Retailer.

When the Class 6 Delivery licensee picks up the cannabis product(s) from the Class 5 Retailer, they must click the Depart button to register that the order(s) have been picked up and are ready for delivery as well as select the OK button in the confirmation action window that appears – **see Figure 11**.



Figure 11: Class 6 Delivery clicks Depart button before embarking on delivery

Multiple Deliveries in One Trip

If the Class 6 Delivery licensee is embarking on multiple deliveries in one trip, the driver should click Depart for all deliveries before leaving the Class 5 Retailer facility.

The Class 6 Delivery licensee can edit the Planned Route in Metrc to reflect the actual route they will take between multiple deliveries. For example, the first delivery would originate at the Class 5 Retailer location, the second delivery would originate at the first delivery address, the third delivery would originate at the second delivery address, and so on – see Figure 12 below.



	Type part of the Driver Name	Q		Type part of the vehicle make, mo	a q
Employee ID	Doe		Vehicle Make	Honda	
Driver's Name	John		Vehicle Model	Civic	
river's Lic, No.	XYZ555		License Plate	CRC-1234	
Phone No. for Questions	555-555-5555				
Est Departure		today	Est Arrival	■ 11/20/2024	today
	▲ ▲ ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●			02 : 55 PM	
Planned Route	Begin at Delivery Address #1: 34 Turn Left on E State Ave Turn Right on S Logan Ave Arrive at Delivery Address #2: 12 Ave	5 E State Ave 23 S Logan			
	Indate Sales Deliveri	es Cancel			

Figure 12: Class 6 Delivery licensee can edit the Transporter Info to reflect actual Planned Route for a Sales Delivery trip that includes multiple delivery orders

The Class 5 Retailer and Class 6 Delivery licensees are both able to view and download the Transportation Manifest at any time once the Sales Delivery has been created. Select the row for the Sales Delivery, then click the View Manifest button – **see Figure 13**.

al	es Deliv	ery Hub	0							
V	/iew Manifest									
	Delivery :	Sales :	Customer Type	Street1: 123 M	In :	Direction	:	Driver	:	Vehicle Info
		11/20/2024 01:52 pm		Street2 City: Trenton State: NJ		⇒ Outbound				Make: Honda Model: CMc Llc. Plate: CRC-1234

Figure 13: Select a delivery, then click View Manifest button to download Transportation Manifest PDF document

When the Class 6 Delivery licensee arrives at the delivery location, the driver must verify the identification of the customer. Click the Verify ID button in the right column, then select Payment Type for Delivery and finish by clicking the green "Verify Customer Id" button. The Class 6 Delivery licensee has now completed their role in the delivery – **see Figure 14 below**.



lew Manifest																	A-	v • =	=-)[+
Delivery : S	Sales :	Customer Type :	Destination :	Direction :	Driver :	Vehicle Info	: Pko's :	Accepted :	ETD :	ATD :	FTA	: ATA	ETRD	ATRD	ETRA I	ATRA :	D Venified	: Pay :	
			Street1: 123 Main Street. Street2: City: Trenton State: NJ Poetal Code: 01234	- Outbound															Verity is
0000000108 1 0	11/05/2024 03:48 pm	Consumer	Street1: 123 Main 58 Street2 CRy: Trenton State: NJ Postal Code: 01234	- Outbound	John	Mase Jeep Model Cherokee Lic Piete ABC123	1	11/08/2024 03:49 pm	11/05/2024 03:48 pm	11/05/2024 08:49 pm	11/05/202 03:48 pm	4					Yos	Cash	
11/05/20	11/05/2024	Consumer	Street: 1234 Street Street2 C#/ Torne	4 Patien	John Male Jeep John Mose Cherole Lic Piete ABC	Make: Jeep	Verify Customer Identification ×							11/05/2024	11/05/2024		Cash		
0	03:44 pm		State: NJ Postal Code: 01234			Lic. Plate: ABC123	Employee ID	Doe		Vet	nicle Make	Honda		mc	03:47 pm	08:48 pm			
	11/05/2024		Street1: 12 Main Street2		John Mate Jeos John Model Chexae Lic Path ABC123	Driver's Name Driver's Lic, No.	John XYZ555	XYZ555		icle Model	CRC-1234		1024	11/05/2024	11/05/2024	-			
0000000113 03.37 pm	03:37 pm	Consumer	City Trenton State: NJ Postal Code: 01234	← Keturn		Model: Cherokee Lic. Piele: ABC123	Phone No. for Questions	555-555-5555		Payr	nent Type	Cash			m 03:40 pm	08:42 pm		Cash	
0000000112 0	11/05/2024 01:08 pm	Consumer	Street: 567 Main Street Street2 City: Trenton State: NJ	→ Outbound	John	Mate Jeep Moder Cherosee Lio. Plate ABC123		Vert	iy Customer Id	Cancel)						100	Cash	

Figure 14: Verify Customer ID and designate Payment Type for Delivery

Class 5 Retailer Completes Sales Delivery

The Class 6 Delivery licensee has completed their role in the sales delivery once the Verify ID step has been completed. The Class 5 Retailer will now see a Complete button in the far-right column of the delivery row in their Sales Deliveries screen. The Class 5 Retailer will enter the Actual Arrival time, and the Payment Type for the Sales Delivery then click the green Complete Sales Delivery button – **see Figure 15**.

Record Deliveries	R Deliveries View Ma	nifest												A- Y-	≡• +
Delivery	: Transporter	: Sales	E Customer Type	E Patient E	Driver	E Vehicle Info	i etd. i	ETA I	1 <u>AA</u> 1	Completed	E Pkg's	: Total	E Recorded	: State	
															Complete
000000116		11/08/2024 12:47 pm	Consumer	Complete Del	ivery	Male. Jeep	11/08/2024	11/08/2024		×		\$24.00	11/08/2024 12:48 pm	Shipped	Complete
0000000108	C/RC0007-17 Acme Transporter	11/05/2024 03:48 pm	Consumer	Employee ID	Doe		Vehicle Make	Honda		1	۰.	\$25.00	11/05/2024 03:49 pm	Shipped	Complete
e e 🚺 Page	1 of 1 > >	20 v rows per	page	Driver's Lic No.	30nn XV2555		Liceose Plate	CRC-1234						Viewing 1 - 3 (3 tota	0 +
				Phone No. for	555-555-5555		Actual Arrival	11/25/20	024	today					
				Payment Type For Delivery	Cash	~			55 PM						
				Pack	Nem Rowdy	010000000900000017 / Roadshow - Buds	Q Quantity	3.5	g Reje	ct Package					

Figure 15: Class 5 Retailer Completes Sales Delivery by Confirming Actual Arrival Time and Payment Type for Delivery



Once the sales delivery has been marked as Complete, it will move to the Inactive tab on the Sales Deliveries grid.

How to Document a Rejected Sales Delivery

There may be a situation where a Class 6 Delivery licensee is not able to complete a delivery for a variety of reasons (customer was not home, customer did not have identification, customer rejected delivery). If a delivery or a package within a delivery is rejected by the customer, the Class 6 Delivery licensee must contact the Class 5 Retailer to let them know as soon as possible (via phone, text, etc.).

The Class 6 Delivery licensee must communicate to the Class 5 Retailer which package(s) were rejected and the reason why, so that the Class 5 Retailer is able to document the return in Metrc.

To document a return, the Class 5 Retailer first clicks the Complete button on the sales delivery. This would be completed once the Sales Delivery has been completed. In the Complete Delivery action window, the Class 5 Retailer will click the Reject Package checkbox, verify the quantity, then complete the Return Reason and Required Note fields – see Figure 16.

Employee ID	Doe			Vehicle Make	Jeep				
Driver's Name	John			Vehicle Model	Cherokee ABC123				
river's <u>Lic.</u> No.	XYZ55	5		License Plate					
Phone No. for	555-55	5-5555		Actual Arrival				today	
Questions					^	^			_
Payment Type	Cash	~]			12]:[47	PM		
For Delivery					*	*			
Pack	age # 1	1A4FF0100000C900000049	٩	Q Quantity	1 g				🗹 Reject Package
n		Garden State Ganja - Buds		Verification	1	Gram	s	~	
				Return Reason	Patient/C	onsumer Ref	used Sales	Deli 🗸	
				Required Note	Custome	r did not ans	wer door		
		Complete Sales Delivery	Cancel						

Figure 16: Document a Rejected Package in the Complete Delivery action window



Note: If a sales delivery contains multiple packages and only one package is rejected, mark only that specific package as rejected. Any packages not marked "Reject Package" will be completed as a sale.

Tips:

- If any package(s) within the delivery are rejected by the customer, the delivery driver should write the rejection reason on the printed manifest and ask the customer to sign off.
- The Void button should only be used to delete a sales delivery that was incorrectly documented or created in error. If a sales delivery was attempted, but not completed, the Reject Package process outlined above should be followed.



Metrc resources

If you have any questions, or need additional support, the following resources are available:

Contact Metrc Support by using the new full-service system – Service Cloud – by navigating to <u>Support.Metrc.com</u>, or from the Metrc System, click the Support area dropdown on the navigational toolbar and click support.metrc.com to redirect to the portal.

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state and "Facility license number", and a valid email to set a password are required.

Metrc Learn: Metrc Learn was recently redesigned to offer interactive educational opportunities to enhance Metrc system users' skills and provide various training options based on experience level.

In addition, the learning system is organized into facility-specific programs made up of various courses. To login or register for an account, visit <u>Metrc Learn</u>.

Access additional resources: In the Metrc system, click on the Support area on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more from the dropdown.

Thank you for your continued partnership.