Metrc Support Bulletin

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

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 New Jersey Industry Bulletin #19 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**.
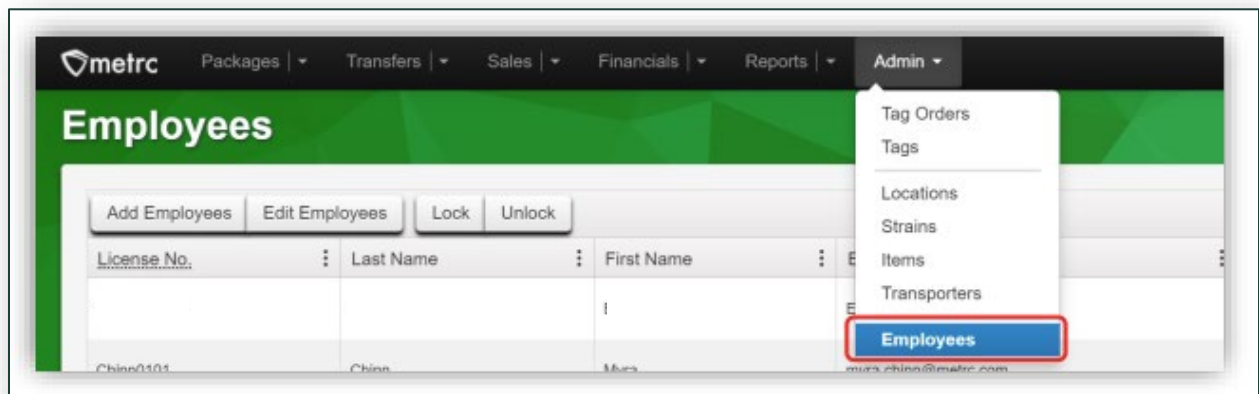
**Figure 1: Accessing the Employees grid from Admin drop down**

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**.
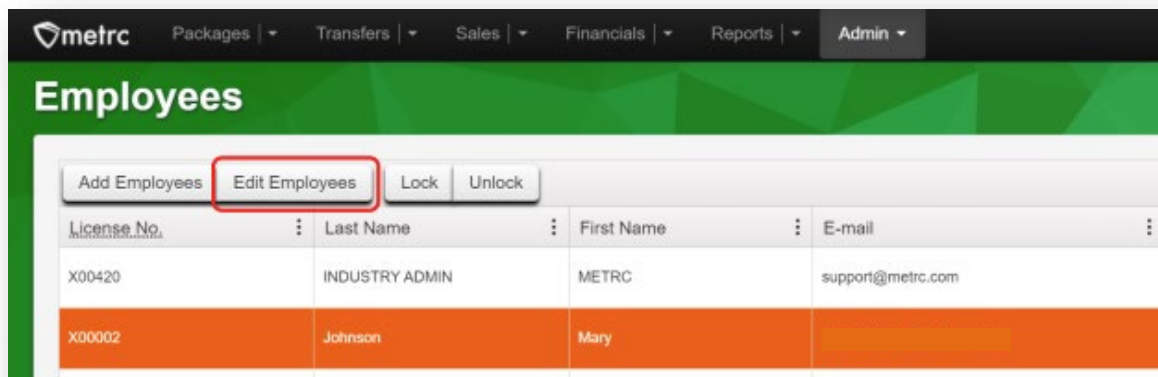
Figure 2: Edit Employees button in the Employees grid

Metrc LLC
For additional support:
please visit Support.Metrc.com

2

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.
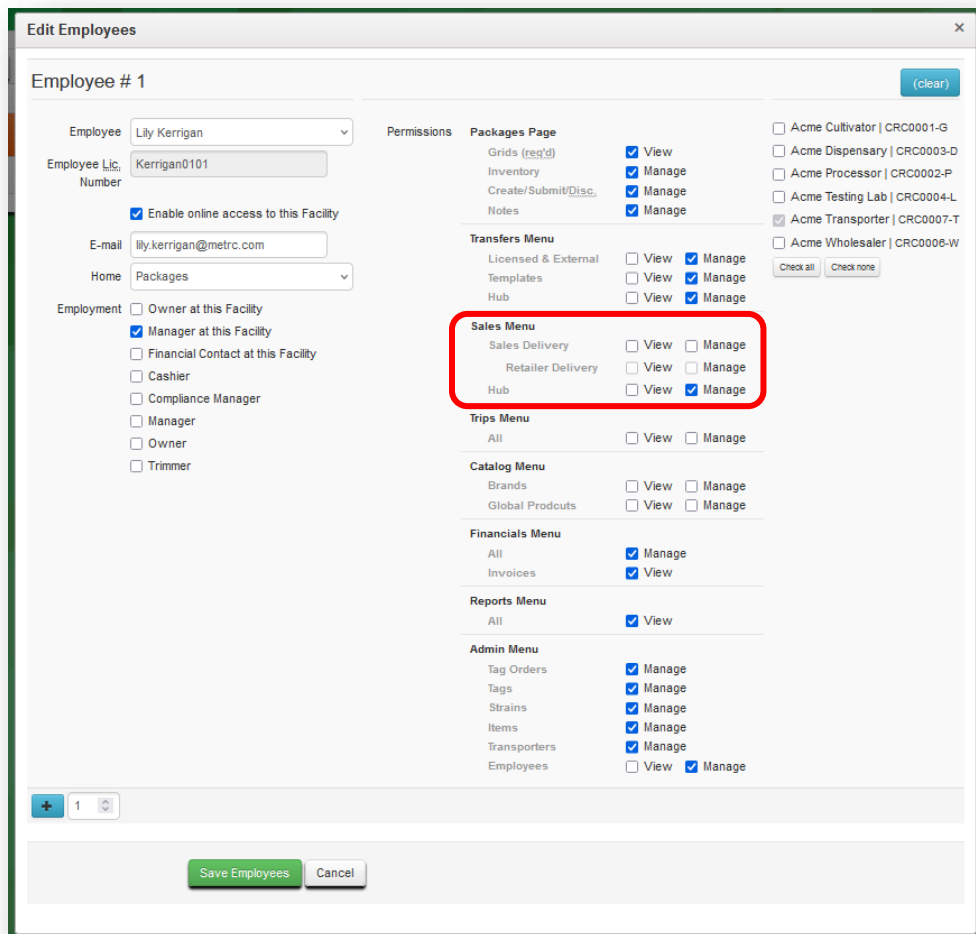

Figure 3: Sales Menu Permissions Options
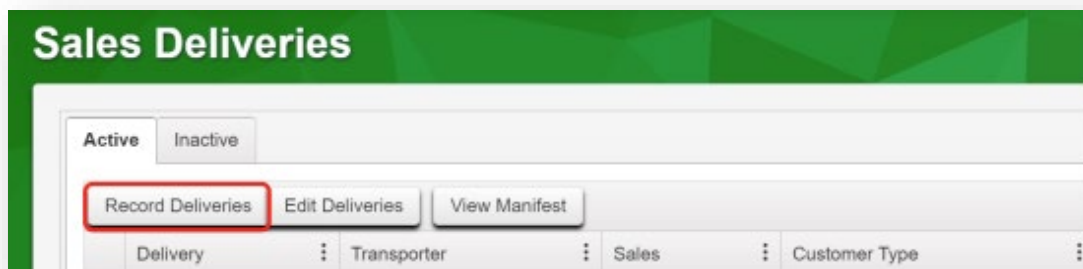
Class 5 Retailer Creates Sales Delivery

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**.
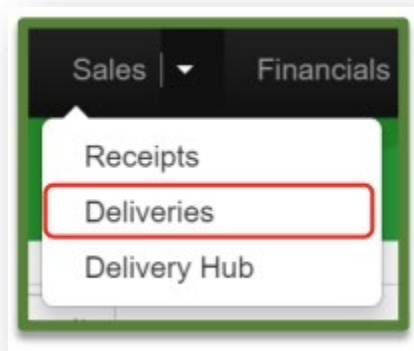

Figure 4: Sales Menu with Deliveries option

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**.

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**.

Metrc LLC
For additional support:
please visit Support.Metrc.com

4
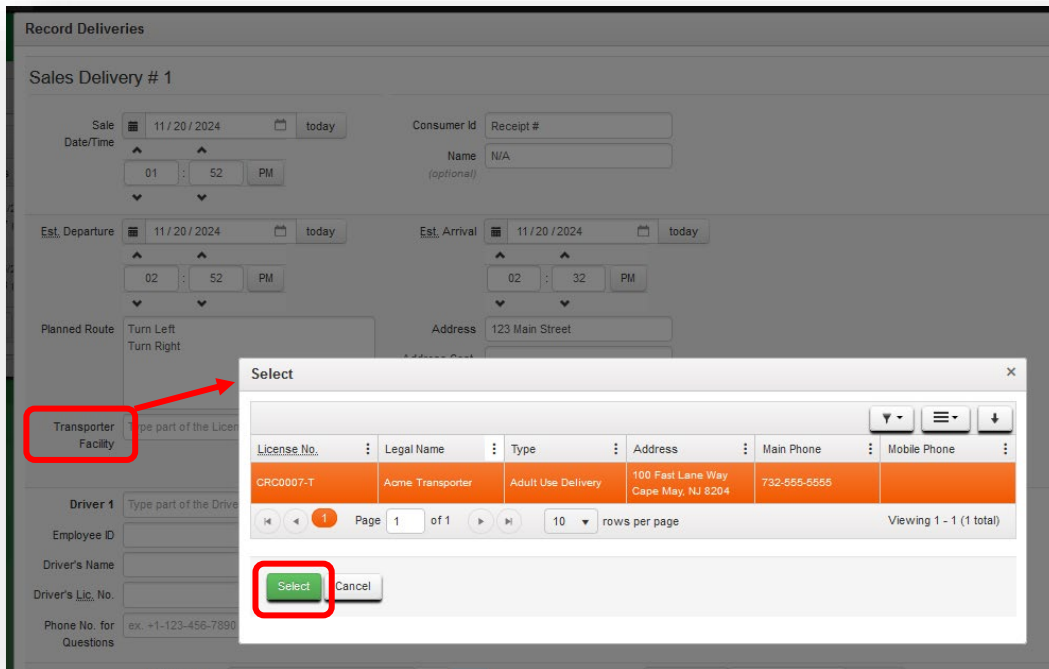
Figure 6: Select Transporter Facility in Action Window

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**.

Metrc LLC
For additional support:
please visit Support.Metrc.com

5

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

Metrc LLC
For additional support:
please visit Support.Metrc.com

6

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**.
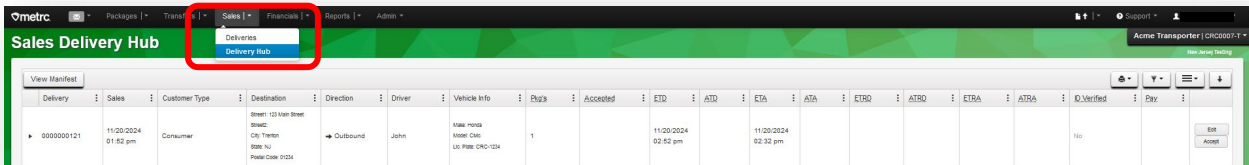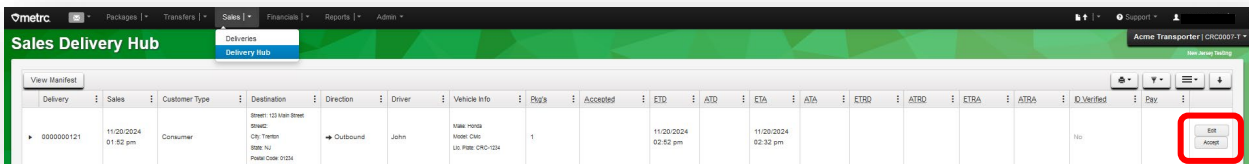

Figure 9: Sales Delivery Hub in the Sales Menu

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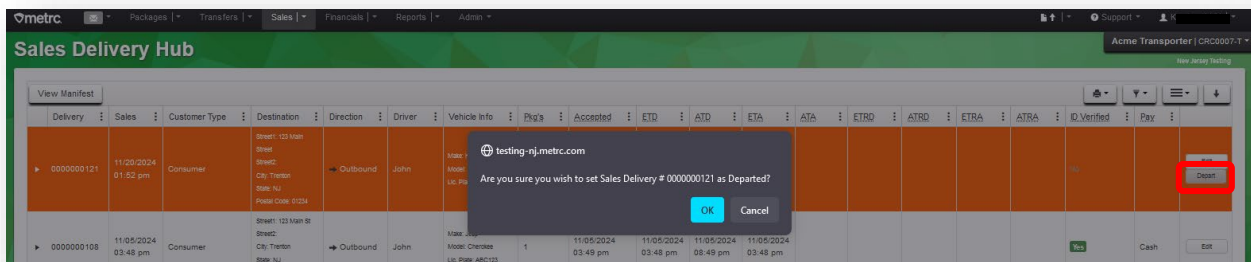
To accept the delivery, the Class 6 Delivery licensee selects the row of the delivery and clicks the Accept button in the right column – **see Figure 10**.

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**.

8
Metrc LLC
For additional support:
please visit Support.Metrc.com
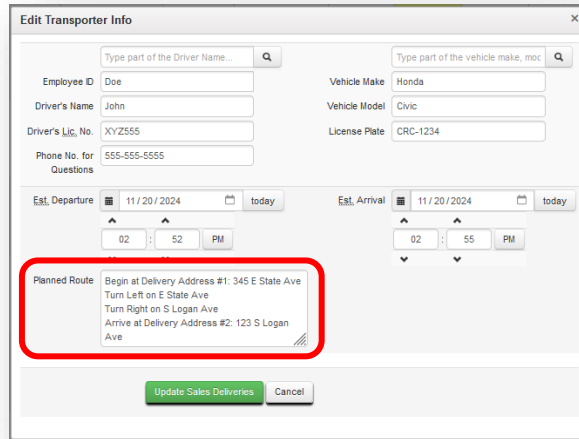
Figure 12: Class 6 Delivery licensee can edit the Transporter Info to reflect actual Planned Route for a Sales Delivery trip that includes multiple delivery orders

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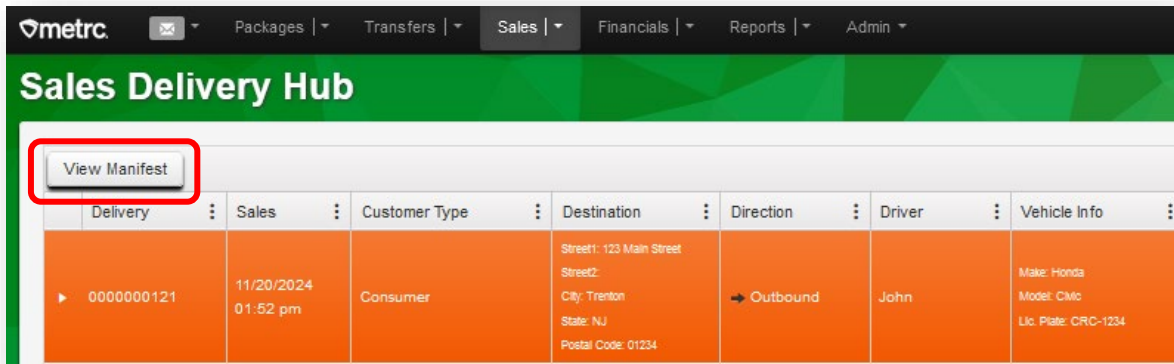
Figure 13: Select a delivery, then click View Manifest button to download Transportation Manifest PDF document

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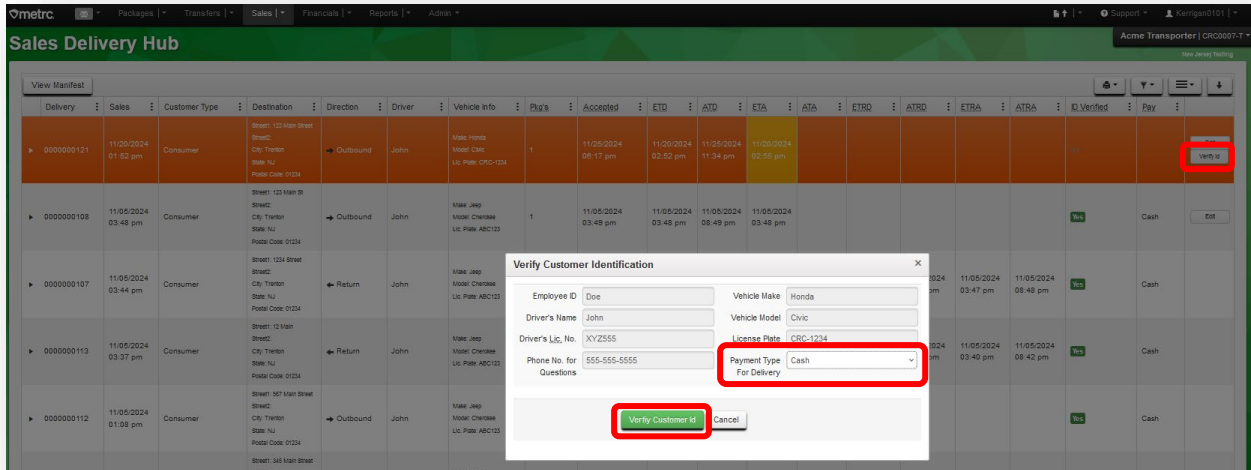
Figure 14: Verify Customer ID and designate Payment Type for Delivery

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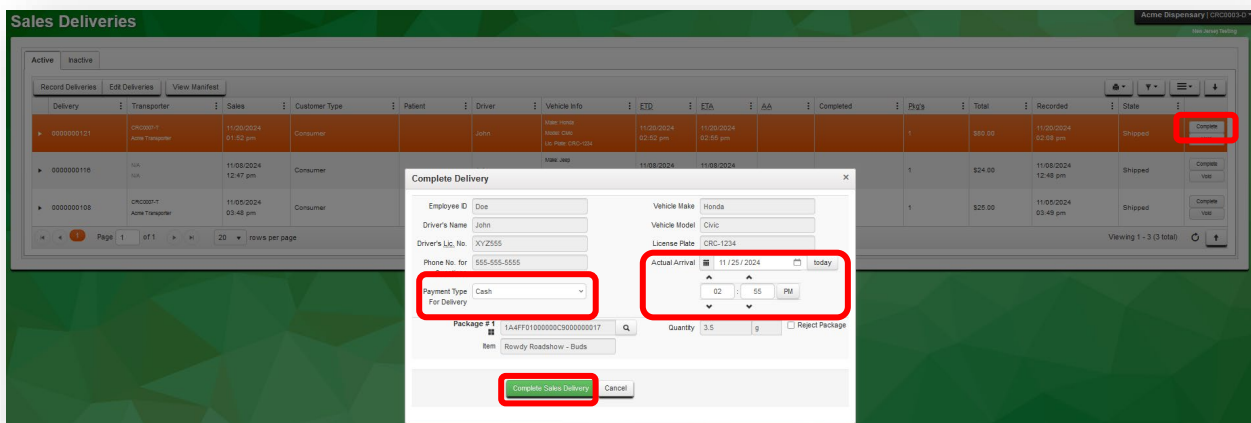
Figure 15: Class 5 Retailer Completes Sales Delivery by Confirming Actual Arrival Time and Payment Type for Delivery

Metrc LLC
For additional support:
please visit Support.Metrc.com

10

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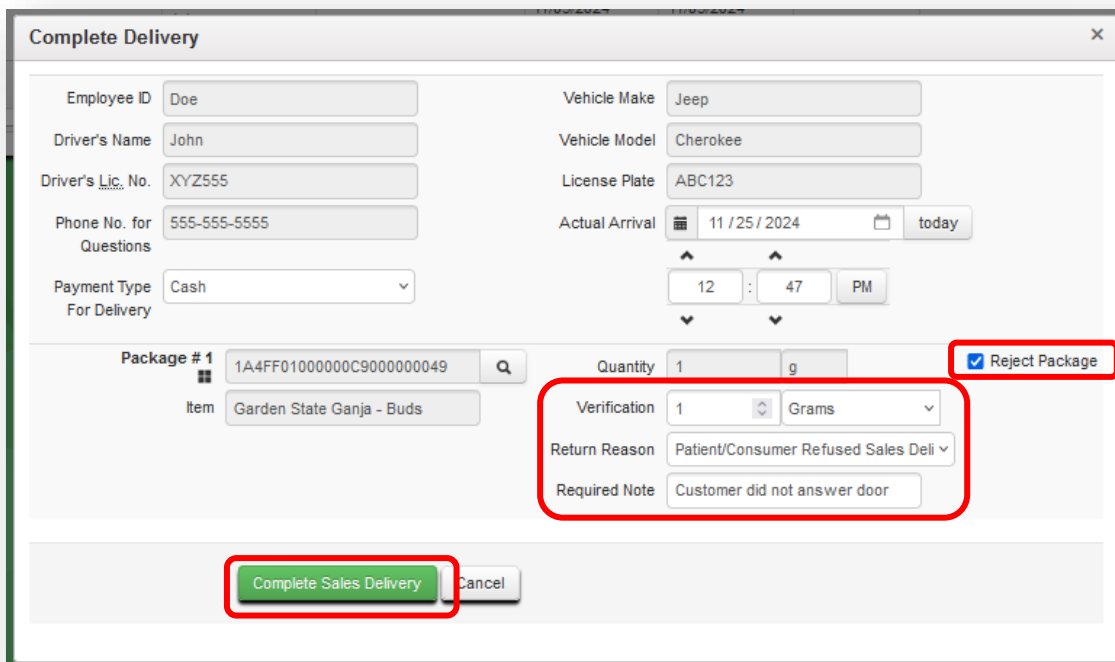
Figure 16: Document a Rejected Package in the Complete Delivery action window

Metrc LLC
For additional support:
please visit Support.Metrc.com

11

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 LLC
For additional support:
please visit Support.Metrc.com

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 Support.Metrc.com, 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 Metrc Learn.

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.

13

Metrc LLC
For additional support:
please visit Support.Metrc.com