Industry User's Guide
California Supplemental

Rev 4.2

California Cannabis
Track-and-Trace System

This user guide describes how California industry participants are intended to use the CCTT-Metrc system consistent with state statutes and regulations. Please refer to the California Transition Period Guide for information about how annual licensees should use the system to enter any existing inventory at the time of annual licensure and how to transfer cannabis and cannabis products to/from temporary licensees.

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Exhibits

1 Introduction

The California Cannabis Track-and-Trace Metrc system is used by Industry businesses to record events throughout the life cycle of cannabis plants and products. This User's Guide contains instructions that incorporate California's specific configurations and proper use. The Metrc system has additional functionality that is generic to all states and is not incorporated into this California specific guide. Additional instructions for use of Metrc to record business events can be found in the Metrc Industry User Guide.

2 First-Time Credentialing and Business Setup

2.1 Initial Business Setup Process

The Metrc Support Team has created a step-by-step process so licensees capture all the necessary requirements and information in Metrc. Setting up a facility in Metrc follows a logical process designed around the common business practices of the cannabis industry. When setting up a Metrc system, it is important to follow this process to minimize data input and maximize accuracy. Remember, all information created in Metrc is in a live system and subject to review by the State. The following steps define the process for setting up a business in Metrc.

1. Follow the first-time credentialing and user profile creation processes described in Sections 2.2 through 2.4 below.
2. Order tags.
3. For each facility add:
   A. Employees (including owners and managers)
   B. Strains
   C. Rooms
   D. Items
4. When tags arrive, receive them in Metrc before entering plants and/or packages.

2.2 Account Manager Credentialing

During the licensing process, an owner, designated responsible party (DRP), primary contact, or other representative authorized to act on behalf of the licensee is identified as the Metrc Account Manager.

The Account Manager must attend the Account Manager New Business training hosted by the Metrc Support Team before accessing Metrc. Once this training is completed and an annual license is issued, the Account Manager sends an email to support@metrc.com or calls Metrc Support (877-566-6506) to initiate the credentialing process and enable Metrc access.

After the Account Manager information is validated, he/she receives a *Welcome to Metrc* email similar to the one shown in Exhibit 1.

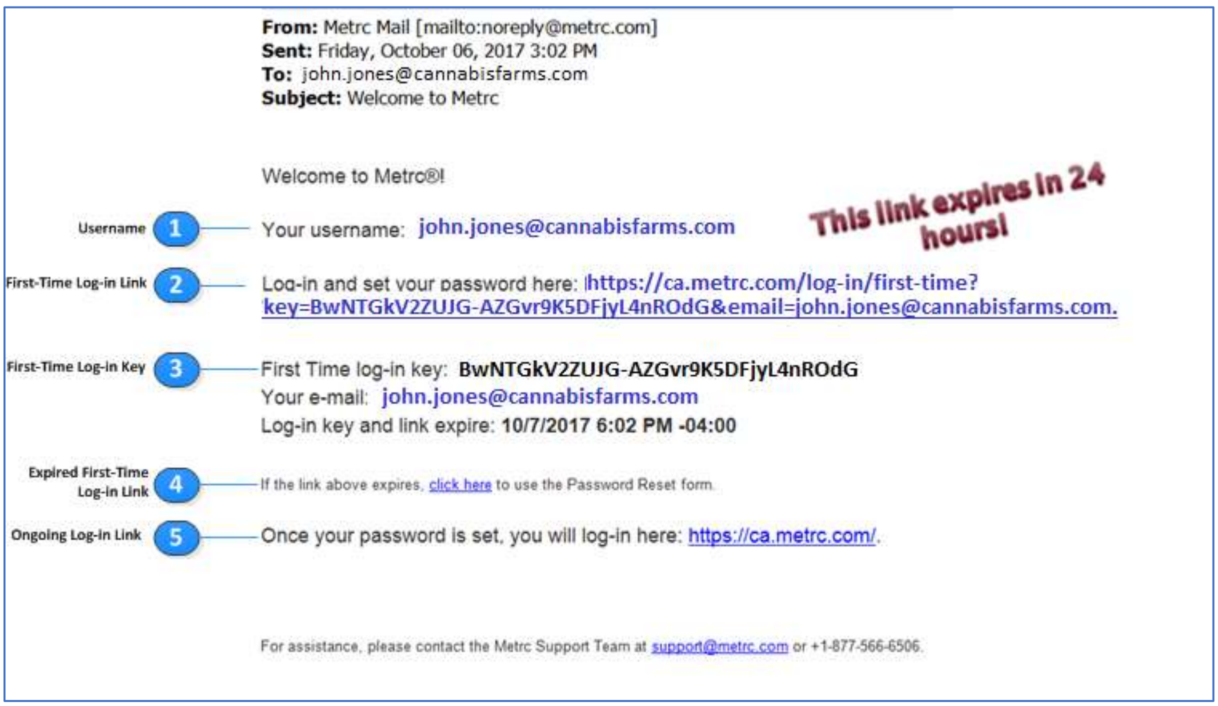


Exhibit 1: The Welcome to Metrc Email

The *Welcome to Metrc* email provides a link and temporary password for logging into Metrc and setting up an account.

NOTE: The first time log-in link is only good for 24 hours, so login within 24 hours of receiving the email. If the log-in link expires, use the *Expired First-Time Log-in Link.* If you no longer have the *Welcome to Metrc* e-mail, contact Metrc Support (877-566-6506) to request that the e-mail be resent.

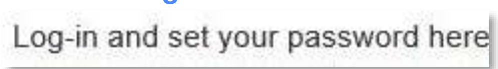
1

Username

The *Username* is based on the email address sent during credentialing (for Account Managers) or the account creation process (for employees). It is used to log into Metrc after the initial log-in.

2

First-Time Log-in Link



Clicking the *First-Time Log-in Link* displays the initial login page pre-populated with the *First-Time Log-in Key* and the user *E-mail* address. Clicking the *Log in* button navigates the user first to the *End User Agreements* page and then to the *User Profile* page to set up security information.

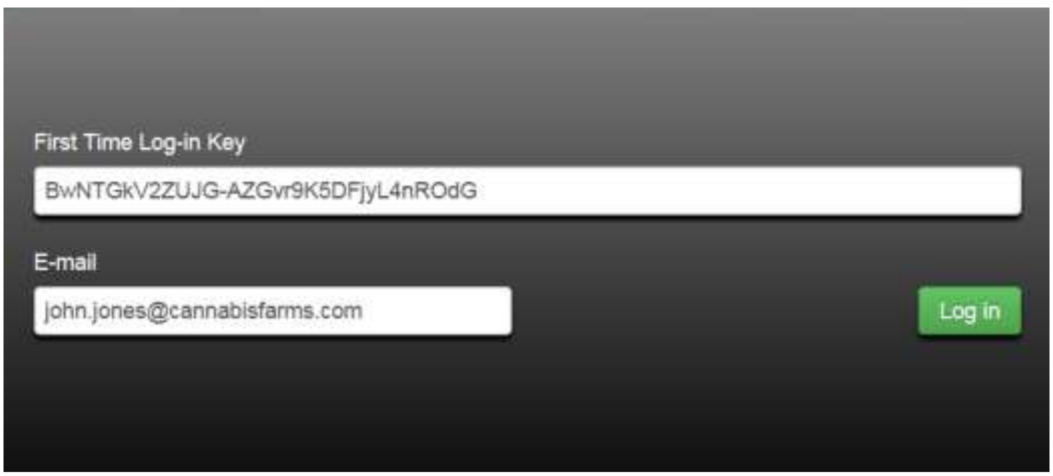
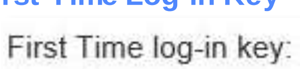


Exhibit 2: The First-Time Log-in Page

3

First-Time Log-in Key



This is a temporary First-Time Log-in Key and can only be used once.

The *First-Time Log-in Link* and *First-Time Log-in Key* will remain active for 24 hours. After 24 hours, use the *Expired First-Time Log-in Link* (see below). If you no longer have the *Welcome to Metrc* e-mail, contact Metrc Support (877-566-6506) to request that the e-mail be resent.

4

Expired First-Time Log-in Link

·If the link above expires, click here to use the Password Reset form.

Expired First-Time Log-in Link is used for the initial log-in when the *First-Time Log-in Link and Key* expire after 24 hours.

5

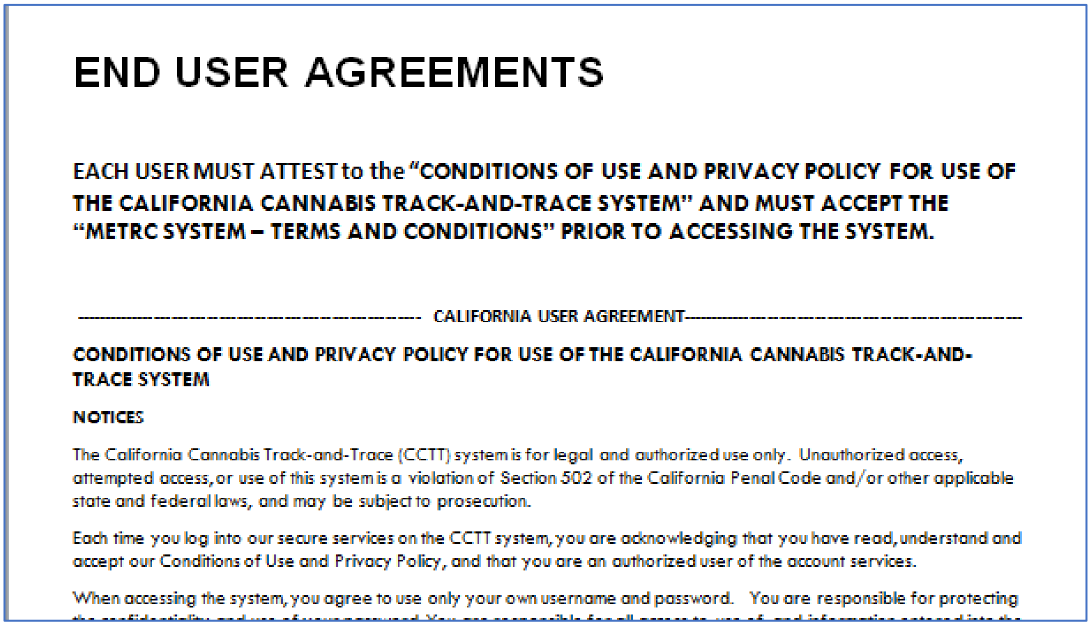
Ongoing Log-in Link

https://ca.metrc.com/

Ongoing Log-in Link is the link used to access Metrc after the first-time login to set-up the *User Profile* and *Password*. It is suggested that this link be added to your Favorites for convenient access.

2.3 End User Agreements

After the *Log-in* button has been selected on the first-time log-in page, the California and Metrc User Agreements shown in Exhibit 3 display. The Account Manager or employee will not be able to gain access to the Metrc system without agreeing to both the agreements.



END USER AGREEMENTS

EACH USER MUST ATTEST to the "CONDITIONS OF USE AND PRIVACY POLICY FOR USE OF THE CALIFORNIA CANNABIS TRACK-AND-TRACE SYSTEM" AND MUST ACCEPT THE "METRC SYSTEM – TERMS AND CONDITIONS" PRIOR TO ACCESSING THE SYSTEM.

--- CALIFORNIA USER AGREEMENT---

CONDITIONS OF USE AND PRIVACY POLICY FOR USE OF THE CALIFORNIA CANNABIS TRACK-AND-TRACE SYSTEM

NOTICES

The California Cannabis Track-and-Trace (CCTT) system is for legal and authorized use only. Unauthorized access, attempted access, or use of this system is a violation of Section 502 of the California Penal Code and/or other applicable state and federal laws, and may be subject to prosecution.

Each time you log into our secure services on the CCTT system, you are acknowledging that you have read, understand and accept our Conditions of Use and Privacy Policy, and that you are an authorized user of the account services.

When accessing the system, you agree to use only your own username and password. You are responsible for protecting

Exhibit 3: California and Metrc User Agreements

2.4 User Profile Creation

Once the terms and conditions of the End User Agreements have been accepted, the Account Manager or employee is directed to the *User Profile* shown in Exhibit 4.

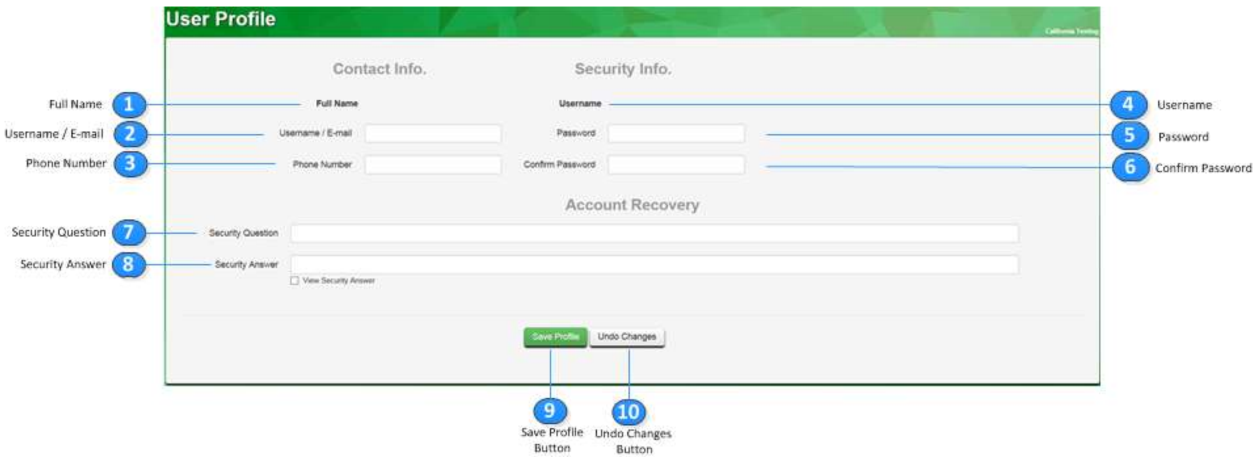


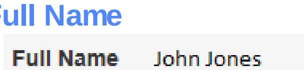
Exhibit 4: The User Profile Page

Complete the *User Profile* shown in Exhibit 4 by creating and confirming a password and providing a security question and answer before selecting the *Save Profile* button.

After the initial login to Metrc, users can access their *User Profile* from the *User* menu at any time to update contact information and update password security.

1

Full Name



This field is auto-populated during the account creation and credentialing process.

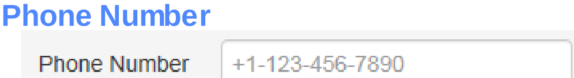
2

Username / E-mail

This field is auto-populated during the account creation and credentialing process. The email address can be changed here, and the *Username* will be updated to the same value.

3

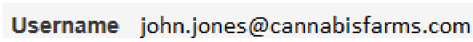
Phone Number



Use this field to enter or change the contact phone number here.

4

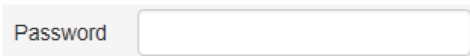
Username



Username is set based on the email address provided during the account creation and credentialing process and is synchronized with the E-mail address when the E-mail address is updated on the User Profile.

5

Password

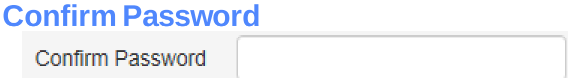


Passwords can be created or changed here.
Passwords must contain, at least:

- One (1) upper case letter
- One (1) lower case letter
- One (1) number, and
- One (1) special character ($#!@&)

6

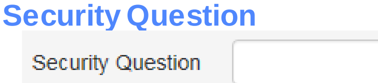
Confirm Password



Confirm the password when creating it and changing it here.

7

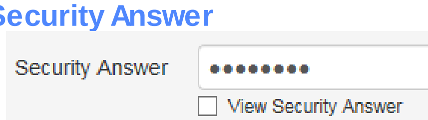
Security Question



Create a security question that can be used to log into Metrc in case of a forgotten password.

8

Security Answer



Provide the answer to the security question here. Select the *View Security/Answer* checkbox to unhide and verify the answer before saving it.

9

Save Profile Button

Select this button to save all information entered into the *User Profile* during the current session.

10

Undo Changes Button

Only select this button to clear all information entered into the *User Profile* during the current session.

2.5 Employee Credentialing

A licensee's Account Manager creates accounts and grant permissions for employees and owners to use Metrc. However, only employees requiring access to Metrc to do their jobs should be given accounts. Each employee should only be granted the minimum permissions required for his/her job. The Account Manager designated by the licensee is responsible for training all employees granted access to Metrc on the proper and lawful use of the system.

NOTE: The Account Manager is responsible for the accuracy of all data recorded in the California Cannabis Track-and-Trace (CCTT) by their Metrc system users.

The Account Manager must have the employee's full name and email address in order to create user accounts. The account creation process generates a *Welcome to Metrc* email for each new user. Using the links and information provided in the *Welcome to Metrc* email, new employee users initiate the first-time log-in and follow the account creation steps described in Sections 2.2 Account Manager Credentialing through 2.4 User Profile Creation above.

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

- **Administration –** Provides the capability to perform all administrative functions, including ordering tags, setting up strains, rooms, and items, and adding employees (it is recommended that the number of users granted administrative permissions be limited).
- **Plants –** Provides the capability to create plantings, move plants, change growth phase, log waste, and create harvests in Metrc.
- **Packages –** Provides the capability to create, adjust, and re-package packages into smaller or larger quantities, as well as create packages of production batches.
- **Transfers –** Provides the capability to create, modify, void, and receive/reject transfers.
- **Transfer Hub –** Provides the capability to view a manifest, edit transporter information, and record actual departure, arrival, layover check-in, and layover check-out dates/times.
- **Sales –** Provides the capability to input sales data or initiate sales uploads.

Additional notes:

- Be sure to enter a valid, unique email address so the employee receives the *Welcome to Metrc* email. If the email address was previously entered in Metrc for an employee of the same licensee or a different licensee, the employee will not receive the

Welcome to Metrc email. Instead, the employee will receive an *Access Granted to Metrc Facility* email which lets them know they have been granted access to the license.

- The employee *Welcome to Metrc* email link expires in 24 hours.
- If a new employee fails to log-in within the 24 hours or does not receive the *Welcome to Metrc* email, the Account Manager can edit the employee record and select the *Resend Welcome Email* checkbox to resend the email containing the temporary log-in information. If the *Resend Welcome Email* checkbox is unavailable, this indicates that the employee previously logged into Metrc and set-up a password on their *User Profile*. If the employee does not remember their password, instruct them to use the password reset link on the Metrc login page.
- The permissions granted to each employee determine which menus are displayed in the Metrc toolbar for that user and whether they can view or update the information.
- The home page selection is the first page an employee sees after successful login. This is where the employee will typically begin his/her work.

2.5.1 Add Employee

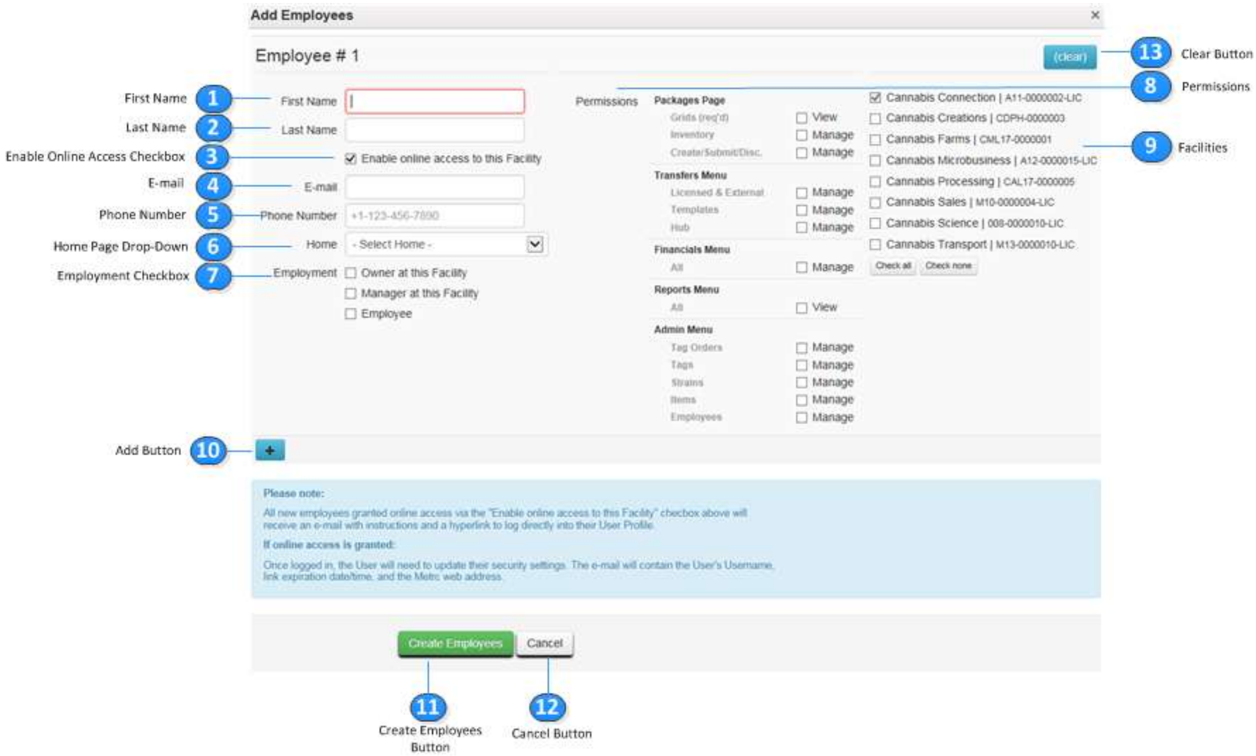


Exhibit 5: The Add Employee Page

1

First Name

Enter the first name of the employee.

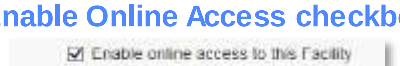
2

Last Name

Enter the last name of the employee.

3

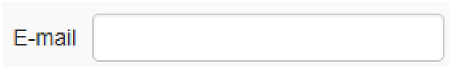
Enable Online Access checkbox



Use this checkbox to grant the employee online access for the current facility. This checkbox will normally be checked for all employees.

4

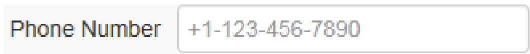
Email



This is the email address where the *Welcome to Metrc* email containing log-in credentials will be received. It will also be used as the employee Username**.**

5

Phone Number



Enter the phone number of the employee.

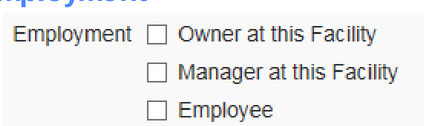
6

Home

Select the *Home* page that should be displayed for the employee upon login based on job duties. This is where the employee will typically begin his/her work. It does not affect an employee's ability to navigate from page to page.

7

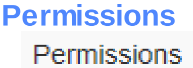
Employment



Identify the role at the facility (owner, manager, or employee). Permissions are not set by this option (see below).

8

Permissions

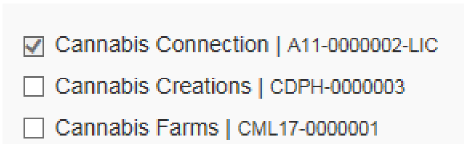


The Account Manager grants permissions to each employee (including owners and managers) based on job duties. These permissions can be edited by the Account Manager as needed.

Select each checkbox to grant access to Metrc pages and menus. These vary according to facility type. For example, Retailers have sales permissions that Cultivators do not have. Examples include:

- Plants page
- Packages page
- Transfers page
- Transfers Hub page
- Reports menu
- Sales menu
- Administration menu

9 Facilities



The Account Manager can use *Facilities* to grant each employee access to one or more facilities at once instead of entering that person into each individual facility's license number. The Account Manager can change access at any time.

10 Add Button

Select this button to add multiple employees at once.

11 Create Employees Button

Select this button to save the work and add the employee to the facility.

12 Cancel Button

Only select this button to exit the page, without saving.

13 Clear Button

Only select this button to clear all information that is currently entered into the page.

2.5.2 Edit Employee

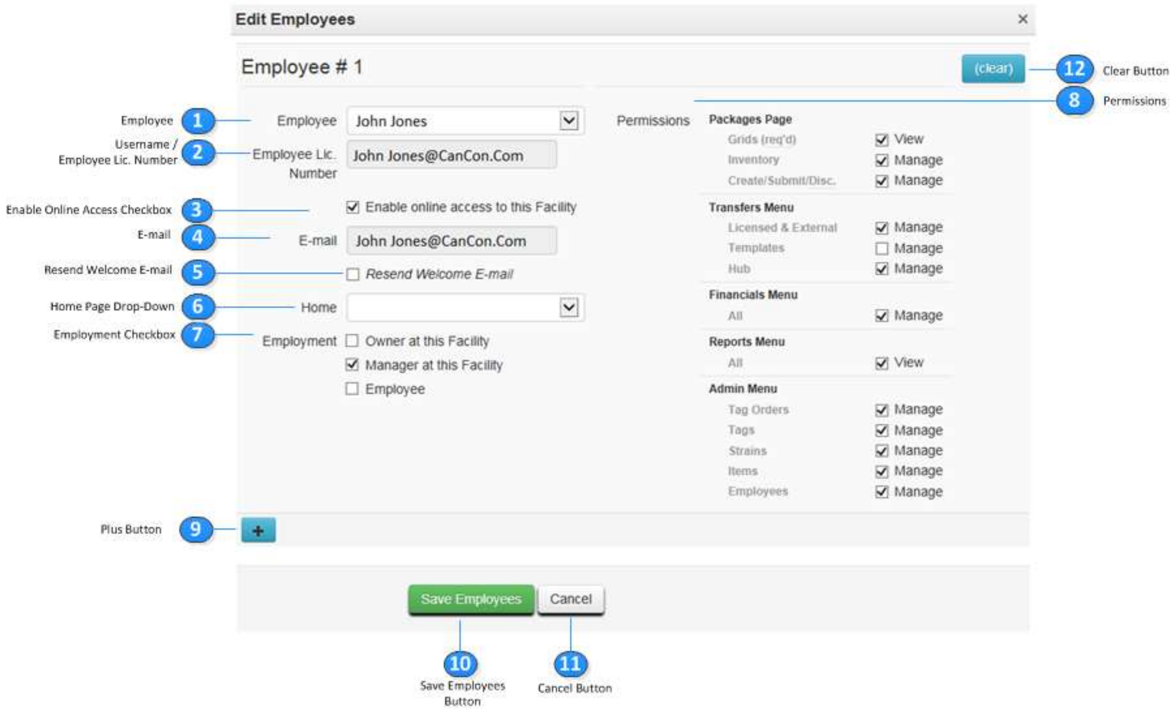


Exhibit 6: The Edit Employee Page

1

Employee

Select the employee name (<First Name> <Last Name>) to be edited from the drop-down list.

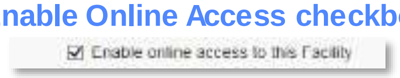
2

Employee Lic. Number/Username

The *Employee License Number* field contains the *Username* of the employee. The *Username* is initially set based on the *E-mail* address entered on the *Add Employee* page, but going forward it can only be updated by the employee on their *User Profile*. This field is read-only.

3

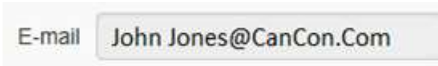
Enable Online Access checkbox



Use this checkbox to grant the employee online access for the current facility. This checkbox will normally be checked for all employees.

4

Email



This is the email address and *Username* of the employee. While the initial *Username / E-mail* value is set when the employee is added to Metrc, going forward it can only be updated by the employee on their *User Profile***.** This field is read-only.

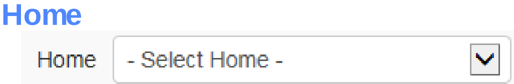
5

Resend Welcome E-mail

This checkbox only displays when an employee has never set-up their *User Profile*. When checked and the *Save Employees* button is selected, the *Welcome to Metrc* email is resent to provide the employee with new first-time login information.

6

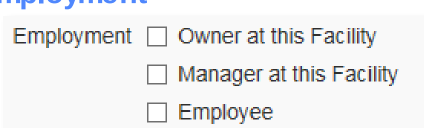
Home



Select the *Home* page that should be displayed for the employee upon login based on job duties. This is where the employee will typically begin his/her work. It does not affect an employee's ability to navigate from page to page.

7

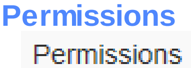
Employment



Identify the role at the facility (owner, manager, or employee). Permissions are not set by this option (see below).

8

Permissions



The Account Manager grants permissions to each employee (including owners and managers) based on job duties. These permissions can be edited by the Account Manager as needed.

Select each checkbox to grant access to Metrc pages and menus. These vary according to facility type. For example, Retailers have sales permissions that Cultivators do not have. Examples include:

- Plants page
- Packages page

- Transfers page
- Transfers Hub page
- Reports menu
- Sales menu
- Administration menu

9

Add Button

Select this button to add multiple employees at once.

10

Save Employees Button

Select this button to save the work and add the employee to the facility.

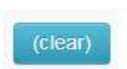
11

Cancel Button

Only select this button to exit the page, without saving.

12

Clear Button



Only select this button to clear all information that is currently entered into the page.

2.6 Adding Strains and Items

Each facility will add strains and items which will be used to enter beginning inventory or transfer inventory. Strains should be entered first as some items will need to use the strain names created from this step. Items created for the facility will correspond to the products the facility produces.

2.6.1 Adding Strains

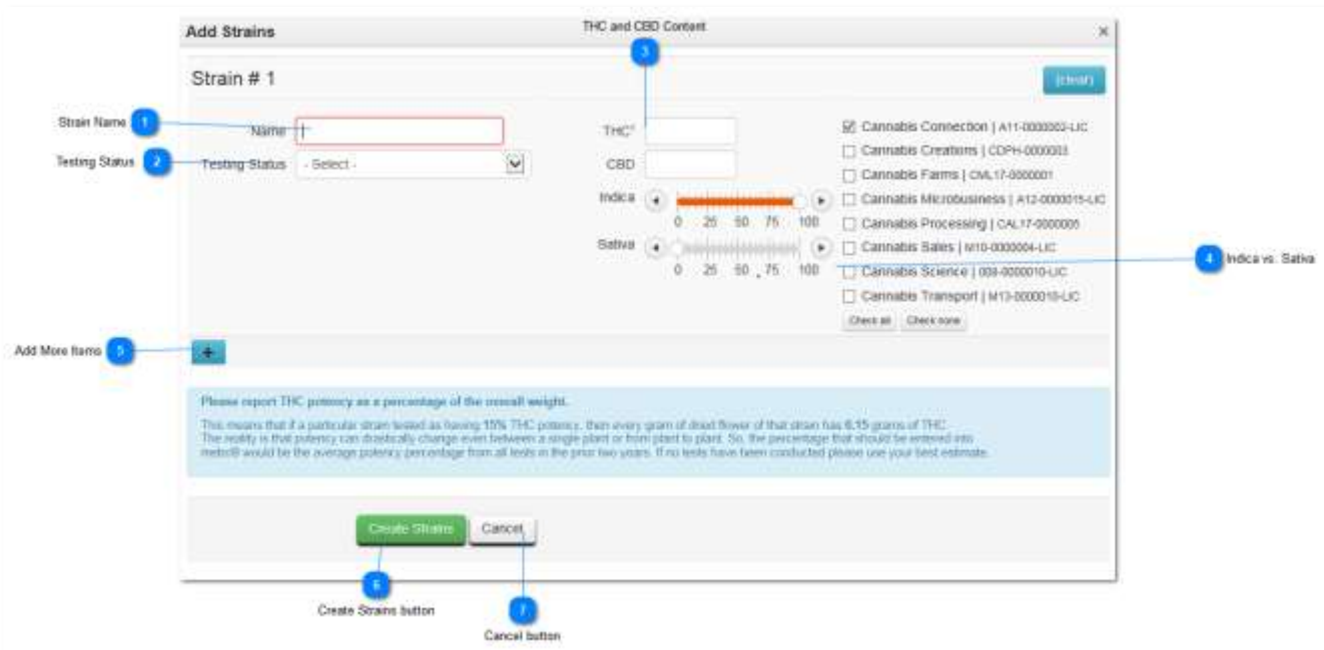


Exhibit 7: The Add Strains Page

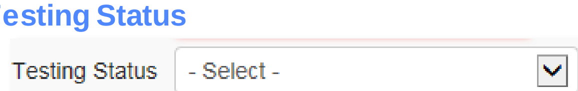
1

Strain Name

Enter the strain name of all strains currently grown in each facility (required field).

2

Testing Status



Select whether or not this strain has been tested, and if so was it done in-house or by a third party (optional field). This field does not have any effect on State testing requirements.

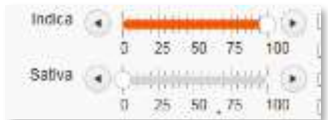
3

THC and CBD Content

Enter the THC and CBD content (optional field).

4

Indica vs. Sativa



Indicate the level of Sativa vs. Indica for each plant.

5

Add More Items

Select this button to add multiple strains from this page at one time.

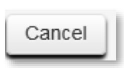
6

Create Strains Button

Select this button to save entered data and create strains.

7

Cancel Button



Select this button to exit the page without saving any changes.

2.6.2 Adding Items

Items are used to track the licensee's inventory through the supply chain life cycle. The *Item Names* are used to identify what type of item is packed into a package. An inventory list of a licensee's current plants or packaged product is a good starting point to create the items in Metrc.

When adding items into Metrc using the page shown in Exhibit 8, keep in mind that:

1. When creating packages, the term *Items* identifies what type of item is in a Metrc package.
2. *Items* in Metrc allow each industry facility to have their own item names.
3. An item name cannot be just simply a category name. It must be specific to the item in that package or production batch.
4. Unlike Employees, Strains and Rooms, Items cannot be created for multiple facilities at one time.
5. See Section 3.2 below for information on switching between facilities.
6. Each facility creates its own items that are unique with item name, category and strain. A facility cannot create duplicate item names.
7. Each item requires a category selection and these categories are determined by the State of California.
8. The purpose of the categories is for grouping similar items for reporting purposes.
9. The item name will identify what is in the package and the category the item belongs in.
10. The facility that packages an item will assign the item name to the package. The package will retain that item name unless it is re-packaged.
11. When creating a package, the item name will be chosen from the list of items previously created.

California has defined the item categories to be used by the industry.

2.6.2.1 Add Items

Exhibit 8: The Add Items Page

Add Item's Name

Enter the item's name to identify what type of item is packed into a package. Items must be uniquely named, even if they are in different categories. For items that are in a *Category* requiring a strain designation, create a unique item name for each strain (i.e., Bud's Blue Dream, etc.).

Category

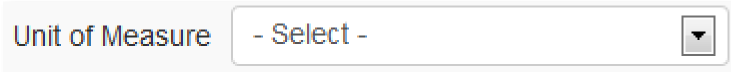
Use the drop-down to select a *Category* for each item. *Categories* are defined by the State of California and are shown in Exhibit 9 with the associated tracking requirements.

Category	Quantity Type	Strain Required	Unit Volume Required	Unit Weight Required
Capsule	*Count Based*	*NO*	*NO*	*YES*
Edible (volume - each)	*Count Based*	*NO*	*YES*	*NO*
Edible (volume)	*Volume Based*	*NO*	*NO*	*NO*
Edible (weight – each)	*Count Based*	*NO*	*NO*	*YES*
Edible (weight)	*Weight Based*	*NO*	*NO*	*NO*
Extract (volume - each)	*Count Based*	*NO*	*YES*	*NO*
Extract (volume)	*Volume Based*	*NO*	*NO*	*NO*
Extract (weight - each)	*Count Based*	*NO*	*NO*	*YES*
Extract (weight)	*Weight Based*	*NO*	*NO*	*NO*
Flower	*Weight Based*	*YES*	*NO*	*NO*
Fresh Cannabis Plant	*Weight Based*	*YES*	*NO*	*NO*
Immature Plant	*Count Based*	*YES*	*NO*	*NO*
Infused Butter/Oil	*Volume Based*	*NO*	*NO*	*NO*
Infused Butter/Oil (each)	*Count Based*	*NO*	*YES*	*NO*
Kief	*Weight Based*	*YES*	*NO*	*NO*
Leaf	*Weight Based*	*YES*	*NO*	*NO*
Other Concentrate (volume – each)	*Count Based*	*NO*	*YES*	*NO*
Other Concentrate (volume)	*Volume Based*	*NO*	*NO*	*NO*
Other Concentrate (weight - each)	*Count Based*	*NO*	*NO*	*YES*
Other Concentrate (weight)	*Weight Based*	*NO*	*NO*	*NO*
Pre-Roll Flower	*Count Based*	*YES*	*NO*	*YES*
Pre-Roll Infused	*Count Based*	*NO*	*NO*	*YES*
Pre-Roll Leaf	*Count Based*	*YES*	*NO*	*YES*
Seeds (each)	*Count Based*	*NO*	*NO*	*NO*
Seeds	*Weight Based*	*NO*	*NO*	*NO*
Tincture	*Volume Based*	*NO*	*NO*	*NO*
Tincture (each)	*Count Based*	*NO*	*YES*	*NO*
Topical (volume - each)	*Count Based*	*NO*	*YES*	*NO*
Topical (volume)	*Volume Based*	*NO*	*NO*	*NO*
Topical (weight - each)	*Count Based*	*NO*	*NO*	*YES*
Topical (weight)	*Weight Based*	*NO*	*NO*	*NO*
Vape Cartridge	*Count Based*	*NO*	*YES*	*NO*
Waste	*Weight Based*	*NO*	*NO*	*YES*

Exhibit 9: State of California Item Categories

3

Unit of Measure



Use the drop-down to select the unit of measure. Depending on the *Quantity Type* defined for the *Category* selected, the available drop-down values may vary, as shown in Exhibit 10. Depending on the *Category* selected, *Unit Weight* or *Unit Volume* may also be required. See *Dynamic Fields* below.

Weight	**Volume**	**Count**
Grams *Kilograms* *Milligrams* *Ounces* *Pounds*	*Fluid Ounces* *Gallons* *Liters* *Milliliters* *Pints* *Quarts*	*Each*

Exhibit 10: Units of Measure

4

Add More Items

Select this button to add multiple items from this page at one time.

5

Create Items Button

Select this button to create items, save the work and exit.

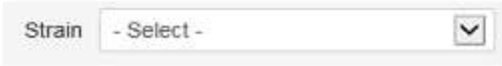
6

Cancel Button

Select this button to exit the page without saving any changes.

Dynamic Fields (shown based on prior data entry):

Strain



This field displays when the *Category* requires a strain designation.

Unit Weight

Use this drop-down to enter a unit weight (based on *Category*).

Unit Volume

Use this drop-down to enter a unit volume (based on *Category*).

3 Metrc Basics

3.1 Navigating in Metrc

Navigating in Metrc is similar to navigating in a traditional website. Metrc uses toolbars and drop-down menus for navigation that can be accessed using a mouse to navigate and perform functional tasks. As shown in Exhibit 11, the primary Metrc navigation bar runs along the top of the window.

Exhibit 11: Metrc's Primary Navigation Bar

The navigation bar has menus for each functional area of the application. A particular menu displays only if the user has the permission to access at least one of the options on that menu.

When the down arrow to the right of a menu is selected, a drop-down menu of options is displayed as demonstrated in Exhibit 12 for the *Transfers* menu. The options that display are based on user permissions.

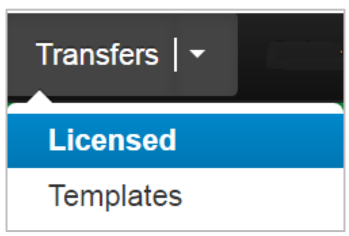


Exhibit 12: Transfers Menu Options (Based on User Permissions)

For menus without the down arrow and those delineated with a |, clicking directly on the menu name navigates the user to the default page for that functional area. The default pages are outlined in Exhibit 13 below.

Menu	Default Page
Plants	*Plants*
Packages	*Packages*
Transfers	*First available option in menu drop-down list*
Sales	*Sales Receipts*
Reports	*Reports Control Panel*
User	*User Profile*

Exhibit 13: Default Pages for Navigation Bar Menus

3.1.1 Licenses and Permissions

The options available in the top navigation bar are based on employee permissions and the facility type (as shown in Exhibit 14). Not all facility types are represented in this table.

	Cultivator 1	Cultivator Processor Only 2	Distributor 3	Distributor Transport Only 4	Manufacturer 5	Manufacturer Packaging/Labeling Only 6	Retailer 7	Testing Laboratory 8	Microbusiness 9
	Cultivator	Cultivator Processor Only	Distributor	Distributor Transport Only	Manufacturer	Manufacturer Packaging/Labeling Only	Retailer	Testing Laboratory	Microbusiness
Plants	✓								✓
Packages	✓	✓	✓		✓	✓	✓	✓	✓
Packages - Remediation					✓	✓			✓
Packages - Test Product								✓	
Transfers	✓	✓	✓		✓	✓	✓	✓	✓
Transfers Hub			✓	✓				✓	✓
Sales							✓		✓
Admin	✓	✓	✓	✓	✓	✓	✓	✓	✓
Reports	✓	✓	✓	✓	✓	✓	✓	✓	✓

Exhibit 14: Navigation Bar Options Based on Facility Type

1

Cultivator

Cultivator

Cultivators have permissions for *Plants, Packages, Transfers, Admin,* and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function permitting abbreviation of the business name in the licensing system to make the name shorter and friendlier.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

2

Cultivator-Processor Only

Cultivator Processor Only

Cultivators - Processor Only have permissions for *Packages, Transfers, Admin,* and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

3

Distributor

Distributor

Distributors have permissions for *Packages, Transfers, Transfers Hub, Admin,* and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

4

Distributor – Transport Only

Distributor Transport Only

Distributors – Transport Only has permissions for *Transfers Hub, Admin,* and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

5

Manufacturer

Manufacturer

Manufacturers have permissions for *Packages, Packages – Remediation, Transfers, Admin,* and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

6

Manufacturer - Packaging/Labeling Only

Manufacturer Packaging/Labeling Only

Manufacturers - Packaging/Labeling Only have permissions for *Packages, Packages – Remediation, Transfers, Admin,* and *Reports*.

The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.

Employees can have any or all of the designated permissions at the discretion of the Account Manager.

7

Retailer

Retailer

Retailers have permissions for *Packages, Transfers, Sales, Admin,* and *Reports*.
The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.
Employees can have any or all of the designated permissions at the discretion of the Account Manager.

8

Testing Laboratory

Testing Laboratory

Testing Laboratories have permissions for *Packages, Packages – Test Product, Transfers, Transfers Hub, Admin,* and *Reports*.
The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.
Employees can have any or all of the designated permissions at the discretion of the Account Manager.

9

Microbusiness

Microbusiness

Microbusinesses have permissions for *Plants, Packages, Packages – Remediation, Transfers, Transfers Hub, Sales, Admin,* and *Reports*.
The Account Manager has all designated permissions. Only the Account Manager has access to the *Friendly Name* function.
Employees can have any or all of the designated permissions at the discretion of the Account Manager.

3.2 Switching Facilities

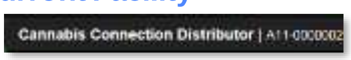
If you are an Account Manager or an employee for multiple licenses, you will have more than one license to choose from. In the upper right-hand corner, use the drop-down arrow to select a facility from a list of facilities, as shown in Exhibit 15.

- For employees of a single facility, only that facility is shown.
- For employees of multiple facilities, first select a facility from the list.

Exhibit 15: Facility License Number and Name

1

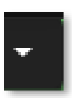
Current Facility



Displays the current facility that the user is working in.

2

Drill-down Arrow



Use this arrow to switch to another facility the user has access to.

3

Other Available Facilities

Lists the other facilities the user has access to in order to switch from one to another.

3.3 Common Elements

Commonly used elements in Metrc are illustrated in Exhibit 16 and described below.

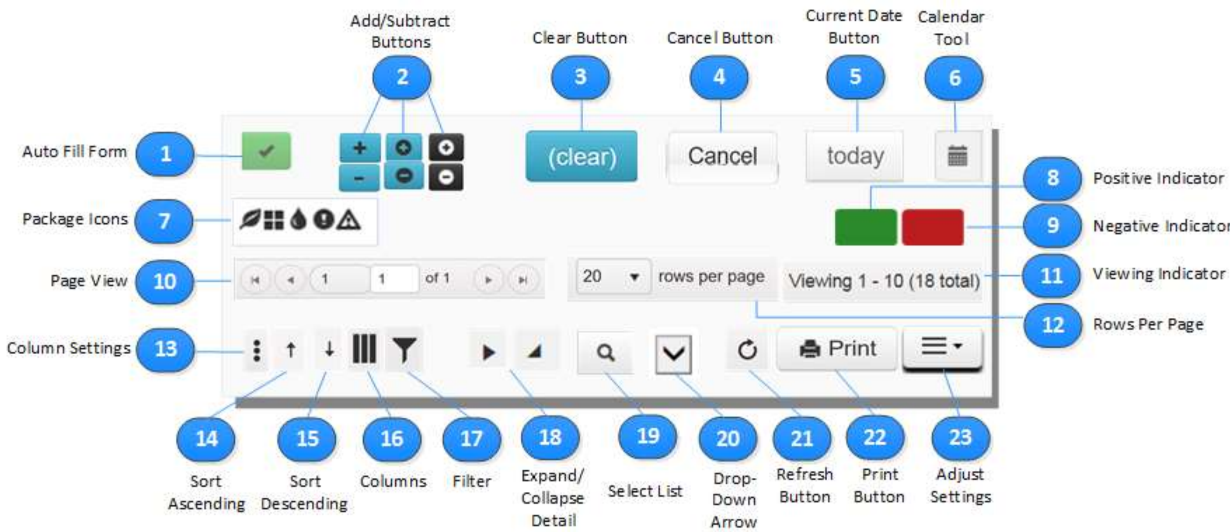


Exhibit 16: Common Metrc Elements

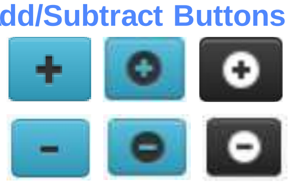
1

Auto Fill Form

This button is used on form templates to populate a specified value in the same field on multiple entry forms.

2

Add/Subtract Buttons



The  and  buttons are used to add/remove additional entry forms when adding/updating information in Metrc. The  and  buttons and the  and  buttons are used to add/remove additional content to an entry form.

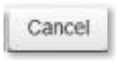
3

Clear button

This button is used to clear all information that is currently entered into the fields on the page, prior to completing the transaction.

4

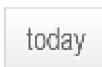
Cancel Button



This button cancels the operation prior to saving information in a field.

5

Current Date Button



Press this button to populate the field with the current date.

6

Calendar Tool

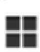
This button launches the Calendar Tool to allow the user to select a date to populate in the field.

7

Package Icons

These icons provide an at-a-glance view of the contents of a package or packages in a transfer.

 Plant Package

 Product Package (e.g. flower or brownies)

 Lab Sample Package

 Remediated Product Package

 Package flagged as Product Requires Remediation - this feature is not used in California

8

Positive Indicator

Text highlighted in green emphasizes a positive situation. For example, a package that has been transferred successfully displays a Status of Accepted, indicating the situation is positive and likely requires no further action.

9

Negative Indicator

Text highlighted in red emphasizes a negative situation. For example, a package that has been placed on hold displays a Yes in the Administrative Hold column, bringing attention to a negative situation that potentially requires attention.

10

Page View

This function shows the number of pages this area has available. It is used in conjunction with the *Rows per Page*.

11

Viewing Indicator

Viewing 1 - 10 (18 total)

This indicator shows the number of items being viewed with the total number of items meeting the filter criteria indicated in parentheses.

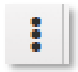
12

Rows per Page

This bar shows the number of rows that can be viewed per page: 5, 10, 20, 50, or 100. The number of rows per page defaults to 20, but this value can be changed by using the drop-down arrow to select a different setting.

13

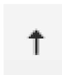
Column Settings



Pressing this button displays the *Column Settings* menu to change the sort of the data, the columns viewed on the grid, or filter the data displayed.

14

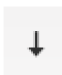
Sort Ascending



This arrow indicates that the data is displayed in ascending order (A to Z) by the data contained in the column.

15

Sort Descending



This arrow indicates that the data is displayed in descending order (Z to A) by the data contained in the column.

16

Columns

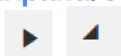
Selecting this option from the *Column Settings* menu allows for the customization of the columns displayed by checking and unchecking the available columns.

17

Filter

Selecting this option from the *Column Settings* menu accesses the filter feature. See Section 3.5 for more details on search functions.

18 Expand/Collapse Detail Arrow



Press the expand button to display additional detail related to a row.
Press the collapse button to hide the additional detail related to a row.

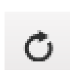
19 Select List

Press this button to display a Select List of items to choose from to populate the field. Generally used when there are a large number of items to choose from.

20 Drop-Down Arrow

Select the drop-down arrow to display a list of items to choose from to populate the field. Generally used when there are a small number of items to choose from.

21 Refresh Button



Press this button to refresh the data on a page.

22 Print Button

Press this button to print the filtered information.

23 Adjust Settings

Press this button to reset the grid settings to the default state when the column display has been modified (see Section 3.5.2 below).

3.4 Notifications

The Metrc application utilizes two methods of automated communication to relay important information to licensees.

The first method is to display a banner across the top of the page upon logging into the Metrc and selecting a specific license from the facility drop-down. Exhibit 17 shows an example of a banner that displays when a package is placed on administrative hold by the State of California.

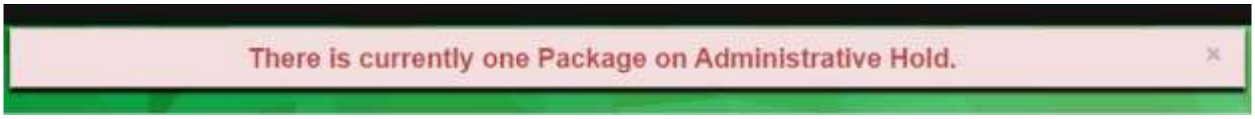


Exhibit 17: Notification Banner

The second method is to display an envelope icon in the top navigation panel. As shown in Exhibit 18, the envelope contains notifications such as transfer rejections and transfer package adjustments which may require action on the part of the licensee.

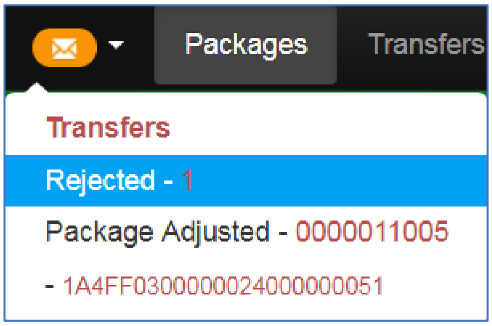


Exhibit 18: Notification Envelope

3.5 Using Search Functions

Search functions allow the industry user to search their inventory based on various criteria. Metrc provides the ability to search in multiple ways with many variables and minimal data. The following instructions demonstrate several examples of how to use the search features.

3.5.1 Sorting

The sort of the data can be changed by clicking a column heading. The up arrow indicates an ascending sort (A to Z).

Exhibit 19: Ascending Sort

Clicking the column again changes the sort to descending. The down arrow indicates a descending sort (Z to A).

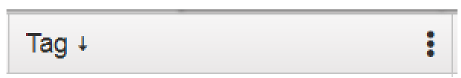


Exhibit 20: Descending Sort

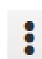
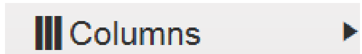
By selecting the *Column Settings* button  the sort order of the data can also be modified to ascending or descending by selecting the required sort from the menu.

Exhibit 21: The Column Settings Menu

3.5.2 Column Display

Selecting the *Columns* 

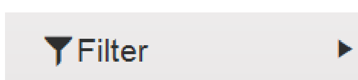
option from the *Column Settings* menu allows for the customization of the columns displayed by checking and unchecking the available columns.

Exhibit 22: The Column Display List

Changes to the *Column Settings* persist between page reloads and from one browsing session to another, however, they do not persist across different browsers.

The default display can be restored by selecting the *Reset Settings* option from the *Adjust Settings* drop-down displayed above the data table as described previously in Section 3.3 above.

3.5.3 Filter Feature

Selecting the *Filter* 

option from the *Column Settings* menu accesses the filter feature. The filter feature allows for searching within each of the individual columns by the criteria specified.

The filter feature shown in Exhibit 23 below allows searching within each of the individual columns. Once information has been entered into the fields, select the *Filter* button to start the query. See the *Metrc Manual/User Guide* for more information.

3.5.3.1 Searching for Items

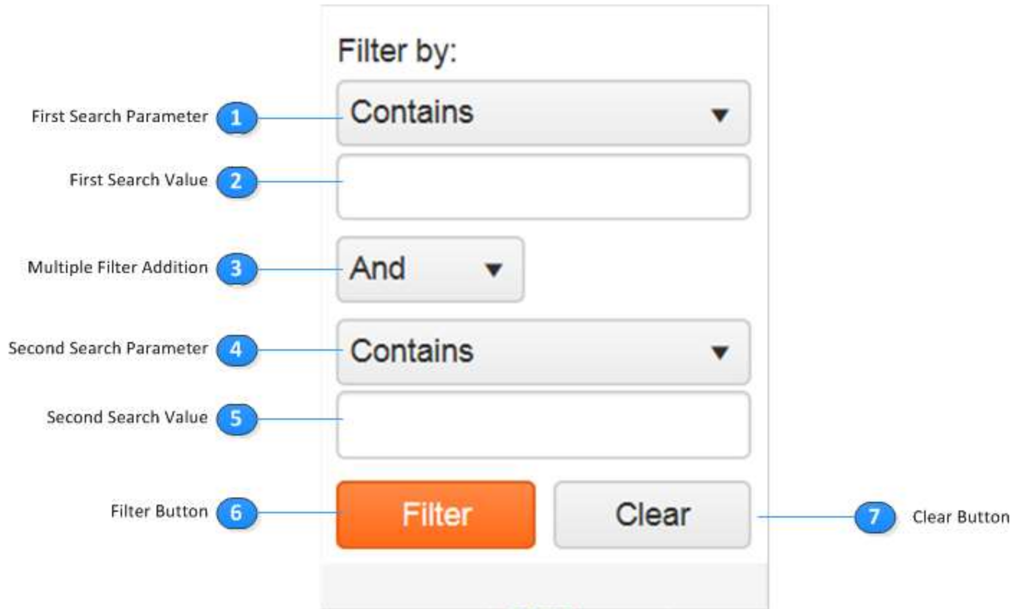


Exhibit 23: Searching for Items

The filter feature shown in Exhibit 23 allows searching within each of the individual columns. Once information has been entered into the fields, select the *Filter* button to start the query. See the *Metrc Manual/User Guide* for more information.

1

First Search Parameter

Use this filter box to filter searches for all items except quantities columns. Search parameters include:
Contains, Does not Contain, Starts with, Ends with, Equal to, and *Not Equal to*.

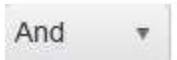
2

First Search Value

Use this field to enter search information (such as the last few digits of a package tag).

3

Multiple Filter Addition



Use this filter box to allow an additional filter to be added to the first. Search parameters include:
And or *Or*.

4

Second Search Parameter

Use this filter box to filter searches by two selections for all items except quantities columns. Search parameters include:
Contains, Does not Contain, Starts with, Ends with, Equal to, and *Not Equal to.*

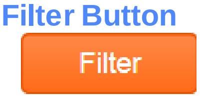
5

Second Search Value

Use this field to enter search information (such as the last few digits of a package tag).

6

Filter Button



Select this button to search or filter for matching records.

7

Clear Button

Select this button to clear all previous filter information.

3.5.3.2 Searching for Quantities

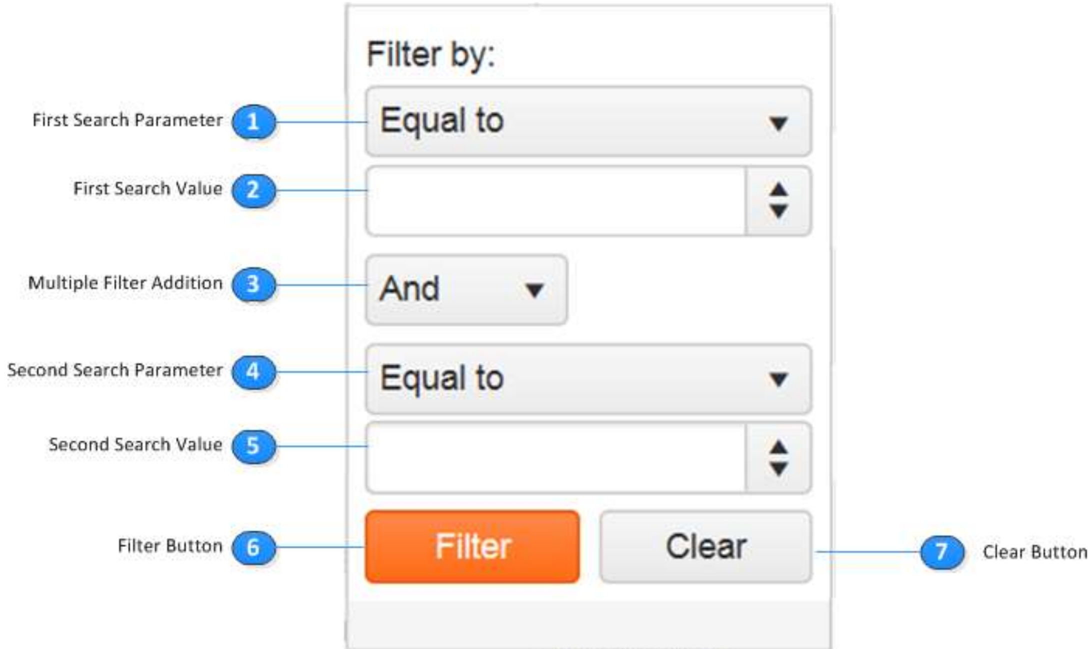
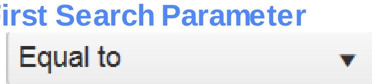


Exhibit 24: Searching for Quantities

1

First Search Parameter



Use this filter box to filter quantities columns. Search parameters include: *Equal to, Not Equal to, Greater than or Equal to, Greater than, Less than or Equal to, Less than*.

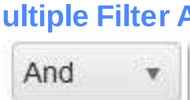
2

First Search Value

Use this field to enter search information (such as the quantity in a package).

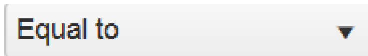
3

Multiple Filter Addition



Use this filter box to add an additional filter to the first. Search parameters include: *And* or *Or.*

4 Second Search Parameter



Use this filter box to filter searches by two selections for all items except quantities columns. Search parameters include:
Equal to, Not Equal to, Greater than or Equal to, Greater than, Less than or Equal to, Less than.

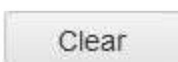
5 Second Search Value

Use this field to enter search information (such as the quantity in a package).

6 Filter Button

Select this button to search or filter for matching records.

7 Clear Button



Select this button to clear all previous filter information.

3.5.3.3 Search Examples

One Search Parameter

Search options allow searching by:
Is equal to, is not equal to, starts with, contains, does not contain, and *ends with*.

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

Multiple Search Parameters (And / Or Searches)

Multiple search options allow *and/or* searches using 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, enter the first 3 digits of a package tag number into the first parameter and the last 2 digits into the second parameter using *and*.
- To see all the transfers in a particular month, enter the month in the first parameter and the year in the Multiple Filter Addition using *and*.

Multiple Search Parameters (Other than And / Or Searches)

You can search by two (2) parameters. Search options allow searching by:
Is equal to, is not equal to, starts with, contains, does not contain, and *ends with.*

- Package Tag – Search using *starts with,* and *is equal to* if you know the first three (3) digits and the last three (3) digits of the package tag.
- Transfer Date – Search using *is equal to* if you know the date the transfers were initiated.

3.6 Templates

Metrc includes template functionality that is enabled when the user indicates that more than one item is to be created with a single action. Templates allow the user to record information more efficiently when creating multiple items simultaneously, such as *Harvest Batches* or *Packages*. Examples of templates available when creating multiple *Harvests* and *Packages* are outlined below.

3.6.1 Harvesting Multiple Plants Template

The example shown in Exhibit 25 demonstrates that when *Plant #2* is added to the *Harvest Flowering Plants* form, the *Template* is activated. The values entered in the *Template* are propagated to both *Plant #1* and *Plant #2* when the *Apply* button is selected for a particular field. The *Plant* and *Weight* are not included in the *Template* and must be entered individually into the form for *Plant #1* and *Plant #2*. Although the *Harvest Name* entered in the *Template* was applied to both plants, different *Harvest Names* could have been entered individually for each plant as well.

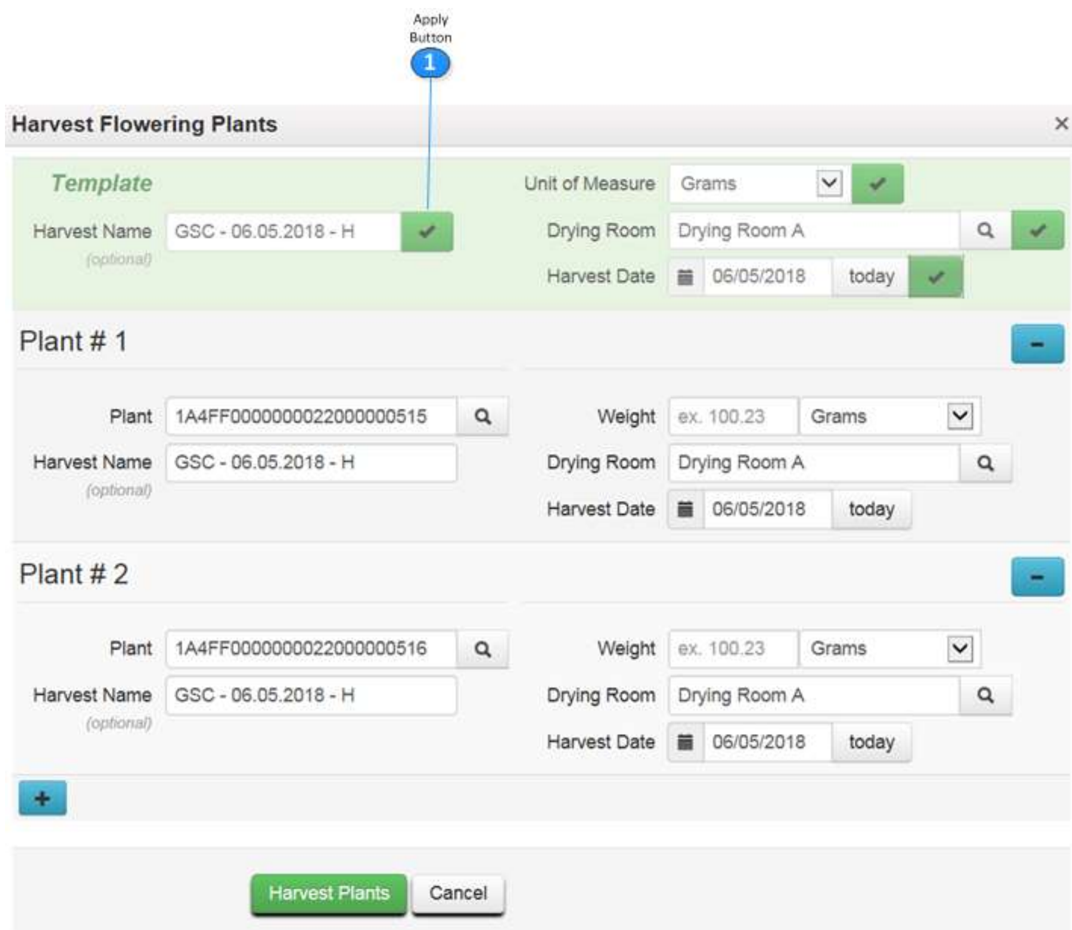


Exhibit 25: Multiple Harvests Template

3.6.2 Creating Multiple Packages Template

The example shown in Exhibit 26 demonstrates that when *New Package #2* is added to the *New Packages* form, the *Template* is activated. The values entered in the *Template* are propagated to both *New Package #1* and *New Package #2* when the *Apply* button is selected for a particular field. The *Quantity* of the new packages is not included in the *Template* and must be entered individually into the form for *New Package #1* and *New Package #2*.

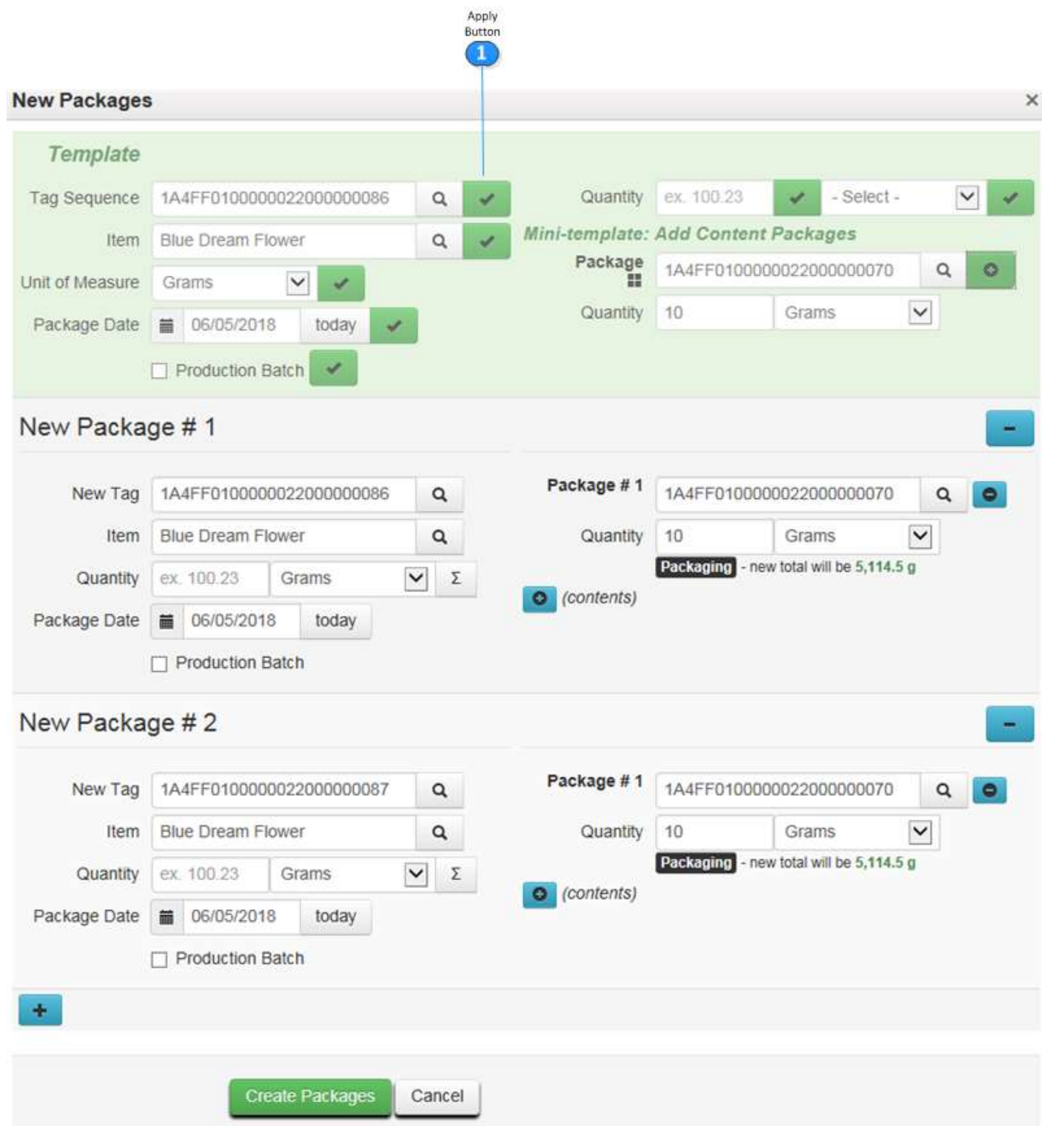


Exhibit 26: Creating Multiple Packages Template

This *Template* includes several advanced features:

- The *Tag Sequence* field can be used to select the *Package Tag UID* to assign to *New Package #1* and to assign the next available Tag(s) to the remaining *New Packages*.

- The *Mini-template* can be used to indicate a content *Package Tag UID(s)* used to create multiple packages. If the same quantity was used from the source package to create each of the new packages, the *Quantity* field in the *Mini-template* can be used in conjunction with the *Package* field. Once the *Package* and, optionally, the *Quantity* are selected, clicking the plus button next to the *Package* field will add the *Package* and *Quantity* as a source package for each new package. This process can be repeated for multiple source packages if applicable.
- When at least one content package is added to one of the new packages, the *Quantity* field dynamically displays above the *Mini-template*. The *Quantity* field can be used to apply the same *Quantity* to each source package(s) being used to create the multiple packages.

4 Tags

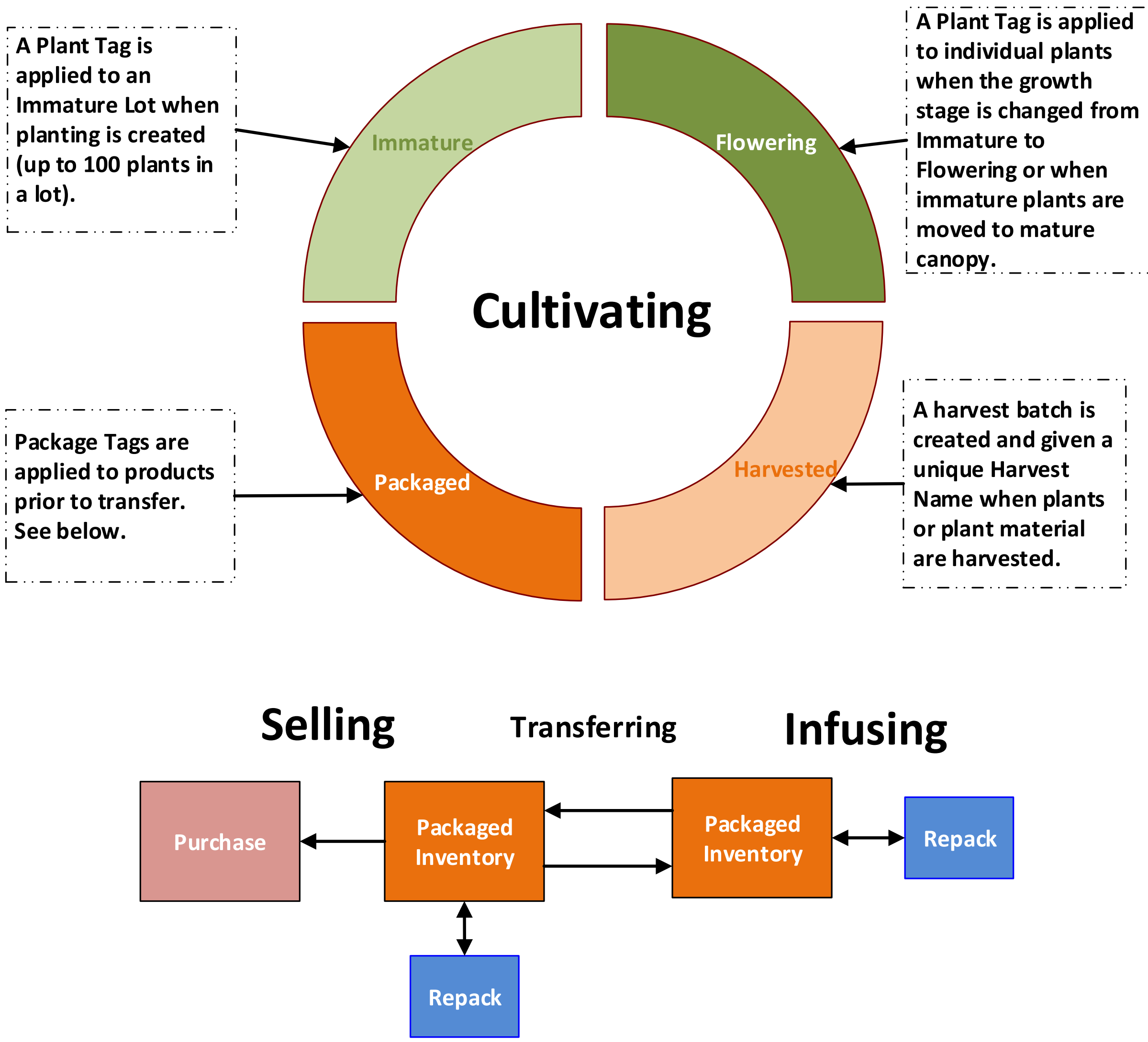


Exhibit 27: Metrc Life Cycle - Cultivation to Sale

Exhibit 27 shows the Metrc life cycle from cultivation to sale. The Metrc software system is based on this process.

4.1 Tag Orders

There are two different types of tags, plant tags and package tags. Tags are used to track plants and packages through the cultivation to sale life cycle. The license type determines which tags can be ordered. Only Cultivators and Microbusinesses can order plant tags.

Additional notes about tag ordering:

- Tags are ordered from the Metrc *Admin* function.
- There is no direct charge to the licensee for the tag order.
- The number of tags ordered cannot exceed the limits imposed by the State.
- Only physical addresses can be used to ship tag orders (P.O. boxes cannot be used).
- Tags will be sent by United Parcel Service (UPS) ground shipping.

4.1.1 New Tag Order

The Account Manager, or any user with sufficient permission, can access the *New Tag Order* page by selecting the *Tag Orders* option from the *Admin* menu in the top navigation bar.

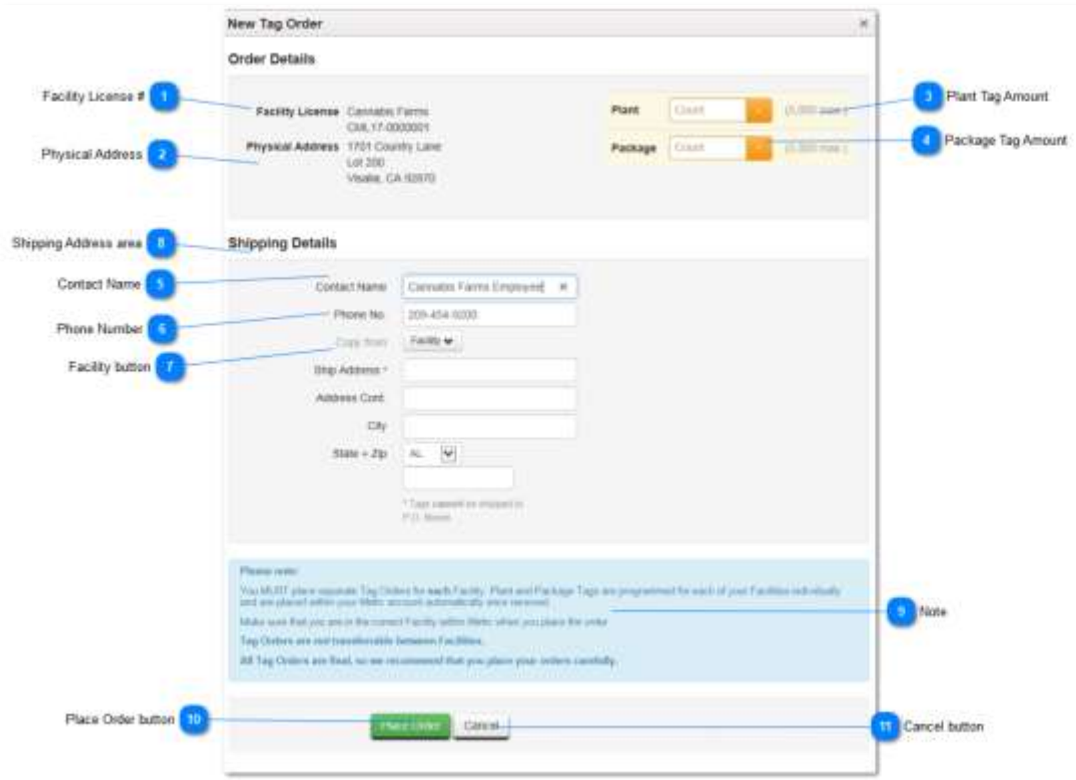


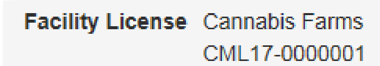
Exhibit 28: New Tag Order

Ordering plant and package tags using *New Tag Order* shown in Exhibit 28 is a simple process; however, it is very important to pay close attention when placing an order.

NOTE: Metrc tags are custom printed for each facility and cannot be cancelled once they have been ordered. Be sure orders are placed for the correct facility, amount, and type of tags required.

1

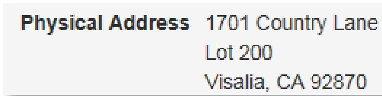
Facility License Name and Number



This field is auto-populated showing the facility that is currently ordering tags.

2

Physical Address



This field is auto-populated with the facility address on file with the State of California.

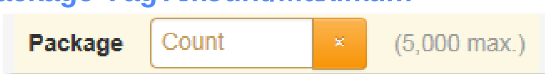
3

Plant Tag Amount/Maximum

Enter the number of plant tags being ordered. The maximum amount that can be ordered, based on license type and current tag inventory, is also shown. Only Cultivators and Microbusinesses can order plant tags.

4

Package Tag Amount/Maximum



Enter the number of package tags being ordered. The maximum amount that can be ordered, based on license type and current tag inventory, is also shown.

5

Contact Name

This field is auto-populated with the name of the Metrc user who is ordering the tags.

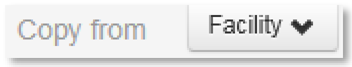
6

Phone Number

This field is auto-populated with the phone number of the facility on file with the State of California.

7

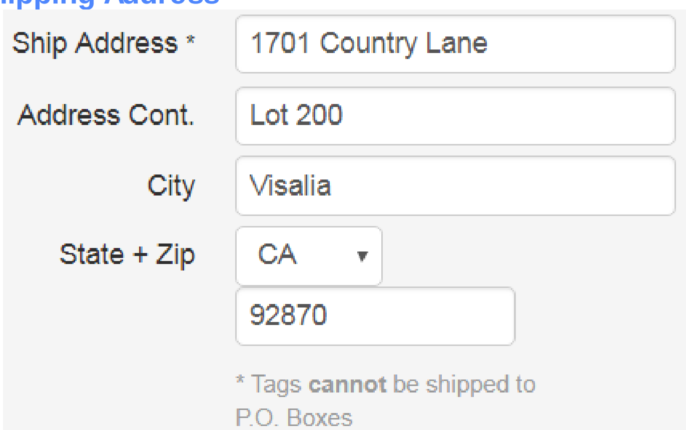
Facility Button



Select this button to auto-populate the shipping address from the physical facility address on file with the State of California.

8

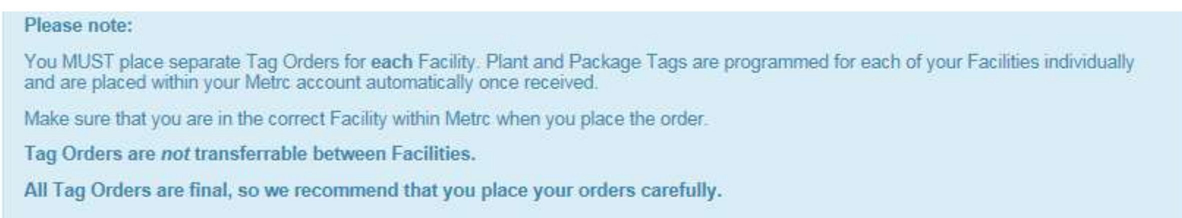
Shipping Address



Use these fields to enter a different address from the physical address noted in the *Order Details* (this field is auto-populated when the *Facility* button above is selected).

9

Notes Area



This field provides important information regarding tag orders for all facilities.

10

Place Order Button

Select this button to place the tag order for a specific facility.

11

Cancel Button

Select this button to exit the page without saving any data.

4.2 Receiving Tags into Metrc

A facility will not automatically receive the tag IDs into its system immediately after placing an order. Once the ordered tags are physically shipped, the tag ID numbers will then become available in Metrc. When the tag's ID numbers are available, a user can see the *Receive* button visible in the tag order page. This is a security feature to prevent the tags from becoming diverted or used by anyone other than the licensee who ordered the tags. When the tags are received, select the *Receive* button to receive them. The *Receive* function will populate ID numbers into that facility's Metrc account.

NOTE: Do not receive the tags in Metrc until they are physically received.

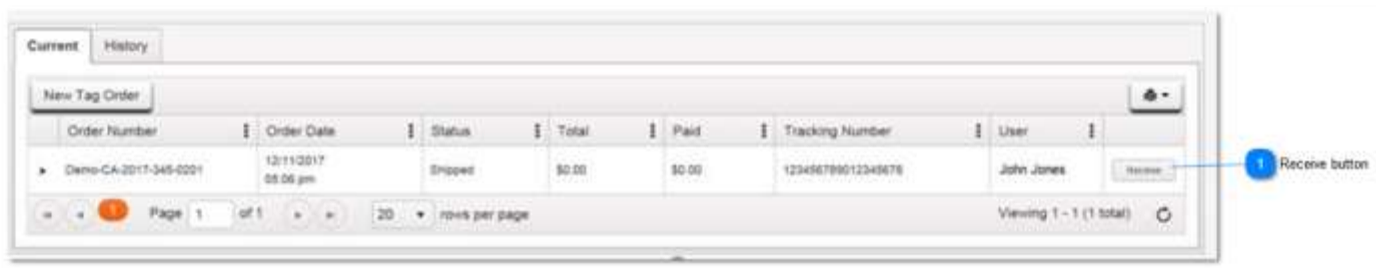


Exhibit 29: The Receive Button on the Tag Order Page

1

Receive Button

Select this button to populate tag ID numbers into the Metrc account for that facility. Once the tags have been shipped, the *Receive* button will be visible on the right side of the page that corresponds to the order number. Selecting the *Receive* displays a confirmation prompt, as shown in Exhibit 30.

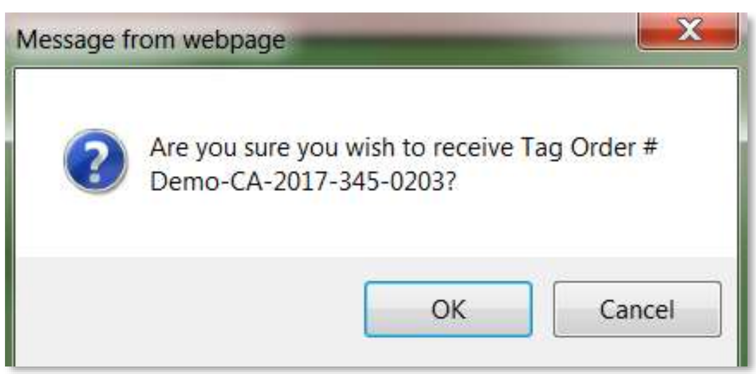


Exhibit 30: Receive Tag Order Confirmation Message

4.3 Monitor Tag Inventory

The Account Manager, or any user with sufficient permission, can monitor the tag inventory on the *Tags* page accessed from the *Admin* menu in the top navigation bar.

Tags in the facility inventory are categorized as *Available, Used* and *Voided*.

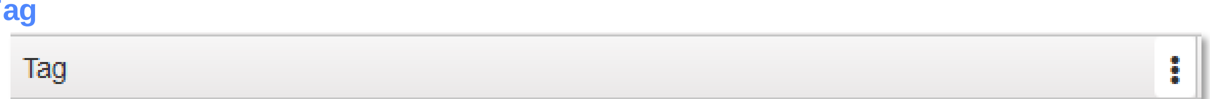
4.3.1 Available Tags

Available Tags such as those shown in Exhibit 31 are those that are assigned to the facility but have not yet been associated to an immature plant lot, flowering plant or package.

Exhibit 31: The Available Tags Page

1

Tag



The unique identification number (UID) printed on the physical tag.

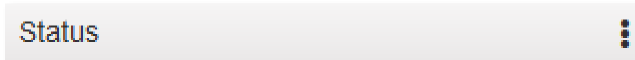
2

Type

This is an indicator of the type of product to be tagged. The tag *Types* are *Plant* and *Package*.

3

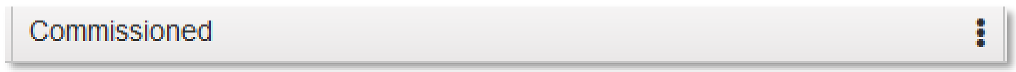
Status



The status for tags on the *Available* tab should be listed as either *Commissioned* or *Received*. *Commissioned* means the tags have been generated and associated to the facility by Metrc but have not been *Received* by the facility.

4

Commissioned



Contains the date/time the tags were generated and associated to the facility by Metrc.

5

Void Button

Select this button to record lost or damaged tags that have never been associated to a plant or package. When this button is selected, a prompt such as the one shown in Exhibit 32 displays for the user to confirm the action.

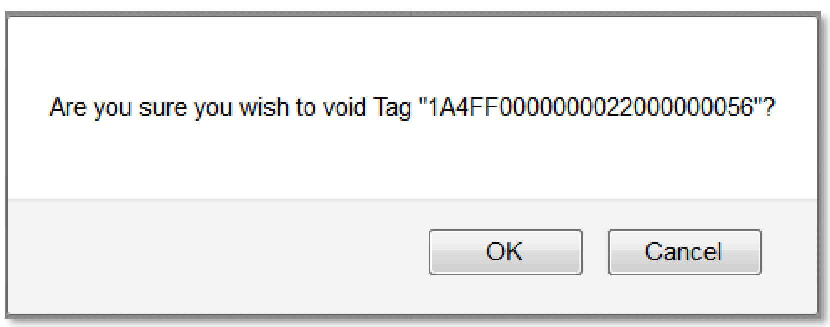


Exhibit 32: Tag Void Confirmation Message

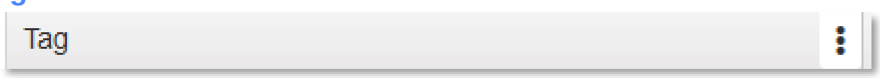
4.3.2 Used Tags

Used Tags are those that are assigned to the facility and have been associated with an immature plant lot, flowering plant or package, as shown in Exhibit 33.

Exhibit 33: The Used Tags Page

1

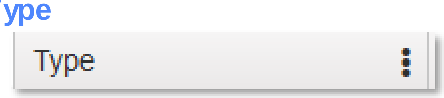
Tag



The unique identification number (UID) printed on the physical tag.

2

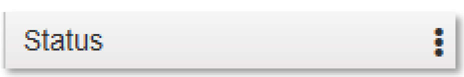
Type



This is an indicator of the type of product to be tagged. The tag *Types* are *Plant* and *Package*.

3

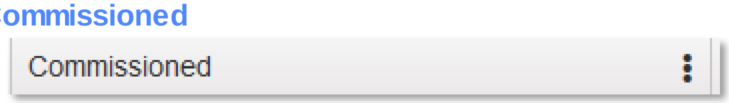
Status



The status of the tags on the *Used* tab.

4

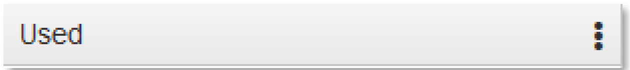
Commissioned



This field contains the date/time the tags were generated and associated with the facility by Metrc.

5

Used



This field contains the date/time the tags were associated to an immature plant lot, flowering plant or package.

6

Detached

This field contains the date/time a tag was replaced by another tag.

4.3.3 Voided Tags

Voided Tags are those that are assigned to the facility, but have never been associated to an immature plant lot, flowering plant, or package, and have been voided by the Account Manager, or employee with tag permissions, due to loss or damage, as shown in Exhibit 34.

Exhibit 34: The Voided Tags Page

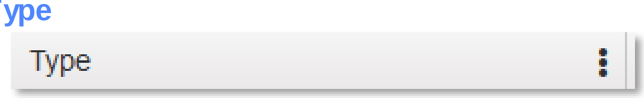
1

Tag

This is the unique identification number (UID) printed on the physical tag.

2

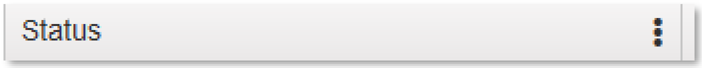
Type



This is an indicator of the type of product to be tagged. The tag *Types* are *Plant* and *Package*.

3

Status



The status of the tags on the *Voided* tab should be listed as *Voided*.

4

Commissioned

This field contains the date/time the tags were generated and associated with the facility by Metrc.

5 Plants

Plants are tagged at the immature lot growth phase and at the mature / flowering growth phase.

5.1 Immature Plant Lot Tag Attachment

Exhibit 35: Immature Plant Lot Tag Attachment

The UID number (plant tag shown in Exhibit 35) is assigned to an immature plant lot of up to 100 seeds or immature plants. Each seed or immature plant in the lot must be labelled with the corresponding UID number of the lot. Please note that the individual immature plant UID labels are not provided by Metrc. The required corresponding UID number labels will need to be produced by the licensee. Immature plant UID labels can be affixed to the container which holds the individual immature plant, attached to the plant itself, and affixed in a form or manner that facilitates identification of the individual immature plant(s) in the designated immature plant lot. Once the immature lot has been established in Metrc, the death of an immature plant(s) must be recorded in Metrc by recording the associated waste amount and reducing the total number of the immature plants in the lot for each immature plant that was destroyed.

5.2 Attaching Tag to Plant

Plant tags are assigned to individual plants when they are moved to a designated canopy area, or when the plant begins flowering. They must be attached to the main stem at the base of each plant using a tamper-resistant strap or zip tie. Exhibit 36 shows some examples of plant tags during various stages of cultivation. Please note these pictures show plant tags used in other states, not those that are used in California.

Exhibit 36: Examples of Plant Tags during Various Stages of Cultivation

5.3 Recording Plant and Harvest Information

Information about handling and recording information in Metrc includes the following:

1. A plant can be destroyed anytime during the growth phases shown in Exhibit 37. Any waste produced by the plant should be recorded prior to the destruction.
2. Any waste created during the immature growth phase must be recorded as waste using the *Plant Waste* function and destroyed.
3. When immature plants begin to flower, select the *Change Growth Phase* button to record the change and associate the new *Plant Tag ID* to the plant(s).
4. In Metrc, anytime something is trimmed from a flowering plant during growing with the intent to sell it, process it, or perform a partial harvest, a *Manicure* batch must be created.
5. Harvest steps include the following:
   A. Harvest Name – Harvests must be strain specific. The *Harvest Name* must be unique. It is a best practice for the harvest name to include the *Strain Name* and *Harvest Date*, but it is not required by the State.
   B. Weight – The plant is weighed individually in its entirety after being cut from root ball (stem, stalk, bud/flower, leaves, trim leaves, etc.).
   C. Waste – This can be recorded using multiple entries but must be reported within three days of destruction.
   D. Package – Package and tag the product from the *Harvest Batch* (*Fresh Cannabis Plant, Flower, Leaf* or *Kief*). These packages must be strain specific.
   E. Transfer – Licensee must create transfer manifest to move product to a Processor, Distributor, or Manufacturer.
   F. Finish – When the *Harvest Batch* (HB) has been fully packaged, there should be remaining wet weight to account for moisture loss. Selecting *Finish Harvest* will attribute any remaining weight to moisture loss.
6. A *Harvest Batch* package of *Flower, Leaf, Kief* or *Fresh Cannabis Plant* can only be created from the *Harvested Tab* using a single strain from plants harvested at the same time.
7. Plant tags may only be used once and may not be reused.

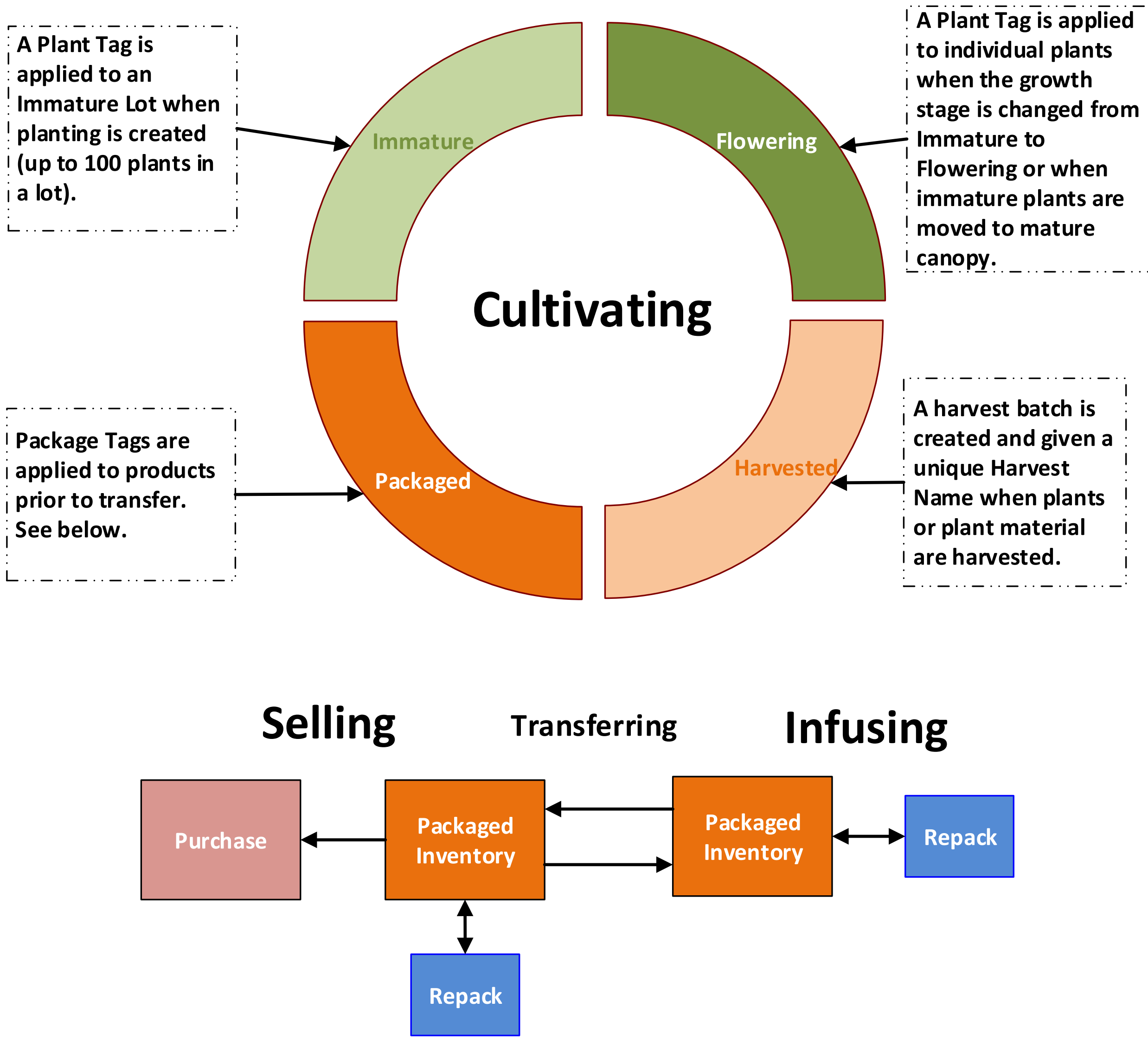


Exhibit 37: Steps in the Cultivation Process

5.3.1 Plant Waste

The following guidelines apply to plant waste:

1. Plant waste must be recorded within three business days of destruction. In Metrc plant waste can be recorded by *Immature Plant Lot, Flowering Plant* or by *Room*.
2. Waste can also be recorded by *Harvest Batch*. See Metrc User Guide for details.
3. When recording *Flowering Plant* waste, the waste from multiple plants can be recorded as a single waste event but the flowering plants contributing to the waste must be individually identified.
4. If a plant is no longer viable, the waste must be recorded prior to recording its destruction.

5.3.1.1 Record Immature Plant Lot Waste

On the *Immature* tab in the *Plants* area, select the *Record Waste* button shown in Exhibit 38 to access the *Record Plant Batches Waste* page.

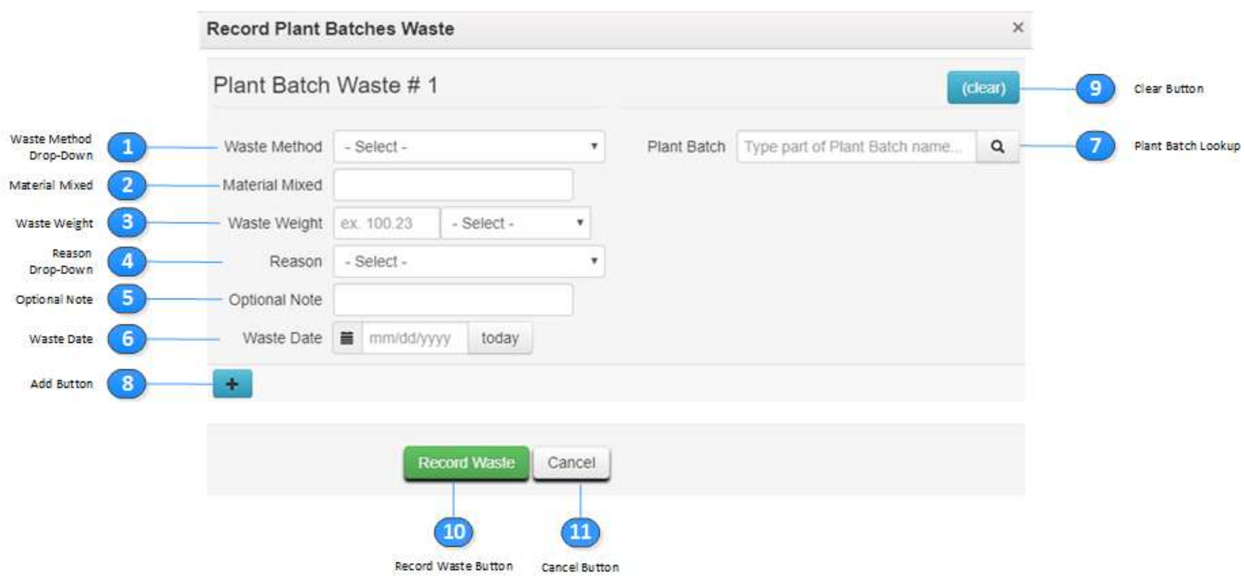


Exhibit 38: The Record Plant Batches Waste Page

1

Waste Method Drop Down

Use this drop-down to identify how the waste was handled. Waste methods defined by the State are: *Compost, Self-Haul,* or *Waste-Hauler*.

2

Material Mixed

Specify any material that was combined with the waste while performing the *Waste Method*. If the *Waste Method* did not require this step, enter *None*.

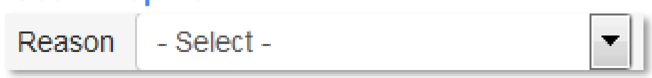
3

Waste Weight

Enter the weight of the waste.

4

Reason Drop Down



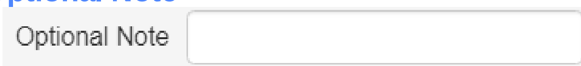
Use this drop-down to explain why the waste occurred. Waste reasons defined by the State are listed in Exhibit 39.

Waste Reason	Reason Usage
Contamination	*Degradation of plant(s) by environmental elements such as pests, filth/foreign material, mold/mildew.*
Damage	*Damage to the plant(s).*
Failure to Thrive	*Failure to grow or develop vigorously.*
Male Plants	*The plant(s) is male.*
Mandated Destruction	*Cannabis plant(s) is destroyed as a result of a State– or local authority–mandated or –supervised process, a response to a health department advisory, or another similar circumstance.*
Pesticides	*Improper usage and application of pesticides on plant(s).*
Pruning	*Cannabis byproduct produced during pruning of plant(s).*

Exhibit 39: State of California Waste Reasons

5

Optional Note



Use this optional field to provide additional information related to the waste.

6

Waste Date

Enter the date the waste event occurred.

7

Plant Batch

Specify the *Immature Plant Lot* that produced the waste.

8

Add Button

Select this button to create another batch of immature plant waste simultaneously.

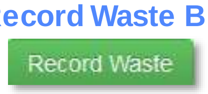
9

Clear Button

Select this button to clear the current information that has been entered into the fields for the waste record.

10

Record Waste Button



Select this button to save the waste record in Metrc.

11

Cancel Button

Select this button to disregard the entries on the *Record Plant Batches Waste* page.

5.3.1.2 Record Flowering Plant Waste

On the *Flowering* tab in the *Plants* area, select the *Record Waste* button to access the *Record Flowering Plant Waste* page shown in Exhibit 40.

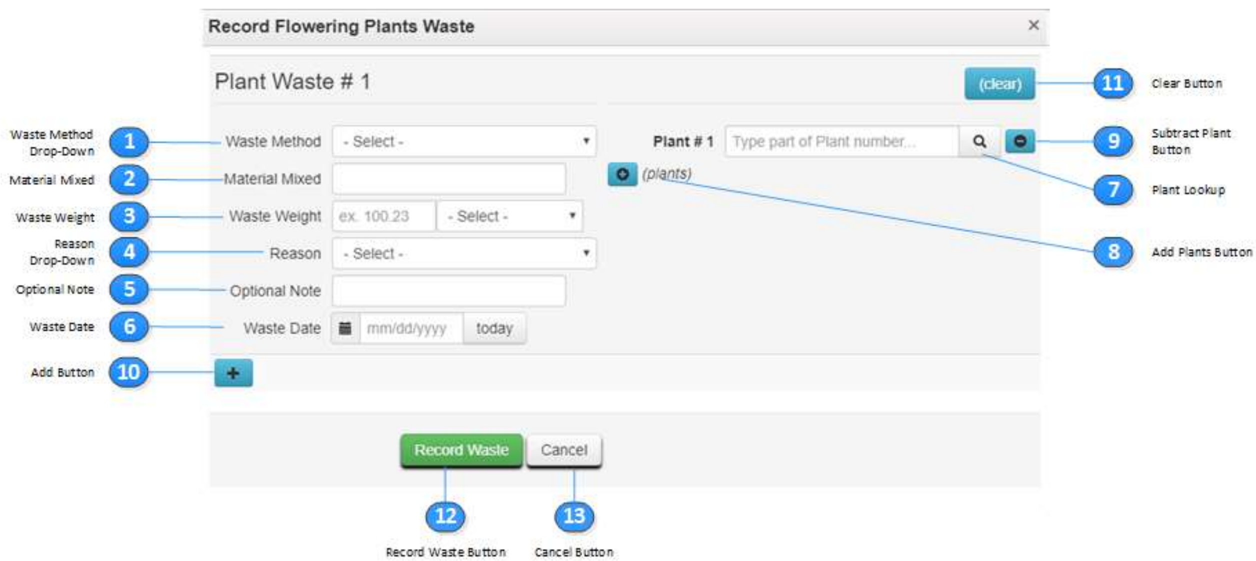
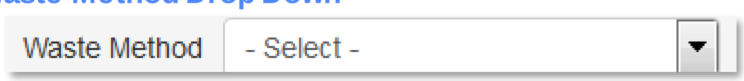


Exhibit 40: The Record Flowering Plant Waste Page

1

Waste Method Drop Down



Use this drop-down to identify how the waste was handled. Waste methods defined by the State are: *Compost, Self-Haul,* or *Waste-Hauler*.

2

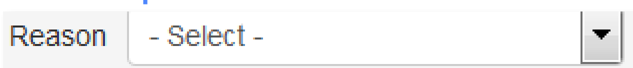
Material Mixed

Specify any material that was combined with the waste while performing the *Waste Method*. If the *Waste Method* did not require this step, enter *None*.

3 Waste Weight

Enter the weight of the waste.

4 Reason Drop Down



Use this drop-down to explain why the waste occurred. Waste reasons defined by the State are listed in Exhibit 41.

Waste Reason	Reason Usage
Contamination	*Degradation of plant(s) by environmental elements such as pests, filth/foreign material, mold/mildew.*
Damage	*Damage to the plant(s).*
Failure to Thrive	*Failure to grow or develop vigorously.*
Male Plants	*The plant(s) is male.*
Mandated Destruction	*Cannabis plant(s) is destroyed as a result of a State– or local authority–mandated or –supervised process, a response to a health department advisory, or another similar circumstance.*
Pesticides	*Improper usage and application of pesticides on plant(s).*
Pruning	*Cannabis byproduct produced during pruning of plant(s).*

Exhibit 41: State of California Waste Reasons

5 Optional Note

Use this optional field to provide additional information related to the waste.

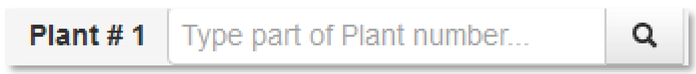
6

Waste Date

Enter the date the waste event occurred.

7

Plant



Use this field to select the *Flowering Plant* that produced the waste. Type part of the number, or use the magnifying glass to display a list of all plants.

8

Add Plants Button

Select this button to select additional *Flowering Plants* which participated in producing the waste.

9

Subtract Plants Button

Select this button to remove *Flowering Plants* previously specified as having contributed to the waste.

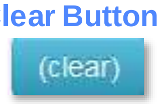
10

Add Button

Select this button to create another waste event simultaneously.

11

Clear Button



Select this button to clear the current information that has been entered into the fields for the waste record.

12

Record Waste Button

Select this button to save the waste record.

13

Cancel Button

Select this button to disregard the entries on the *Record Flowering Plant Waste* page.

5.3.1.3 Record Waste by Room

On the Waste tab in the Plants area, select the Record Waste by Room button to access the *Record Room Plants Waste* page shown in below.

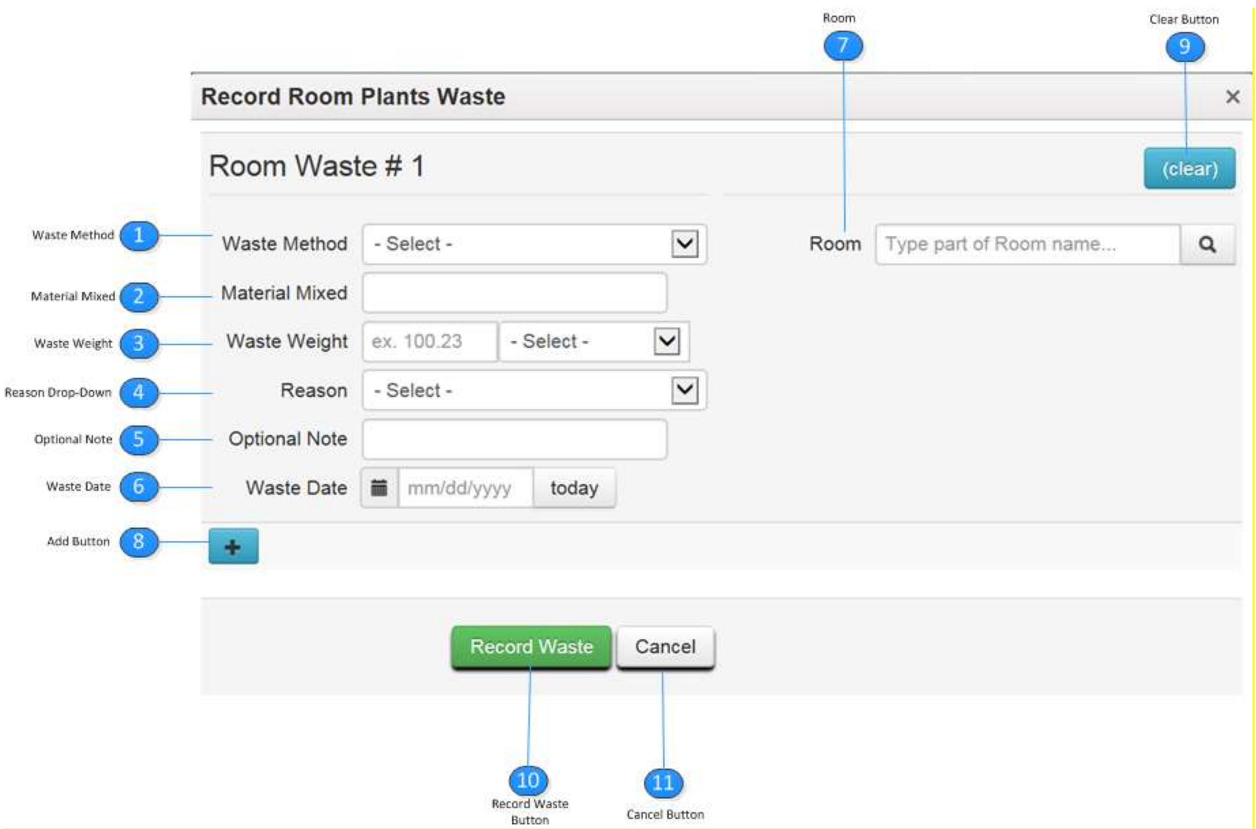


Exhibit 42: The Record Plant Waste by Room Page

1

Waste Method Drop Down

Use this drop-down to identify how the waste was handled. Waste methods defined by the State are: *Compost*, *Self-Haul*, or *Waste-Hauler*.

2

Material Mixed

Specify any material that was combined with the waste while performing the *Waste Method*. If the *Waste Method* did not require this step, enter *None*.

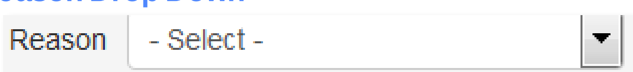
3

Waste Weight

Enter the weight of the waste.

4

Reason Drop Down



Use this drop-down to explain why the waste occurred. Waste reasons defined by the State are listed in Exhibit 43.

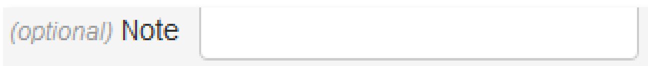
Waste Reason	Reason Usage
Contamination	*Degradation of plant(s) by environmental elements such as pests, filth/foreign material, mold/mildew.*
Damage	*Damage to the plant(s).*
Failure to Thrive	*Failure to grow or develop vigorously.*
Male Plants	*The plant(s) is male.*
Mandated Destruction	*Cannabis plant(s) is destroyed as a result of a State– or local authority–mandated or –supervised process, a response to a health department advisory, or another similar circumstance.*

Waste Reason	Reason Usage
Pesticides	*Improper usage and application of pesticides on plant(s).*
Pruning	*Cannabis byproduct produced during pruning of plant(s).*

Exhibit 43: State of California Waste Reasons

5

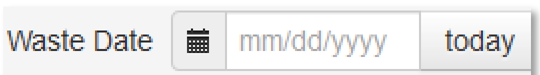
Note



Use this optional field used to provide additional information related to the waste.

6

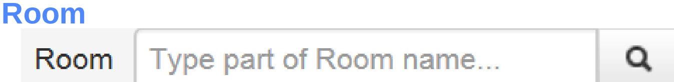
Waste Date



Enter the date the waste event occurred.

7

Room



Use this field to select the *Room* containing flower plants that produced the waste. Type part of the number, or use the magnifying glass to display a list of all rooms.

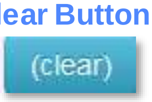
8

Add Button

Select this button to create another waste event simultaneously.

9

Clear Button



Press this button to clear the current information that has been entered into the fields for the waste record.

10

Record Waste Button

Press this button to save the waste record.

11

Cancel Button

Press this button to disregard the entries on the *Record Room Plants Waste* page.

5.3.1.4 Waste History

The waste events recorded for *Immature Plant Lots* and *Flowering Plants* and by *Room* display on the *Waste* tab shown in Exhibit 44.

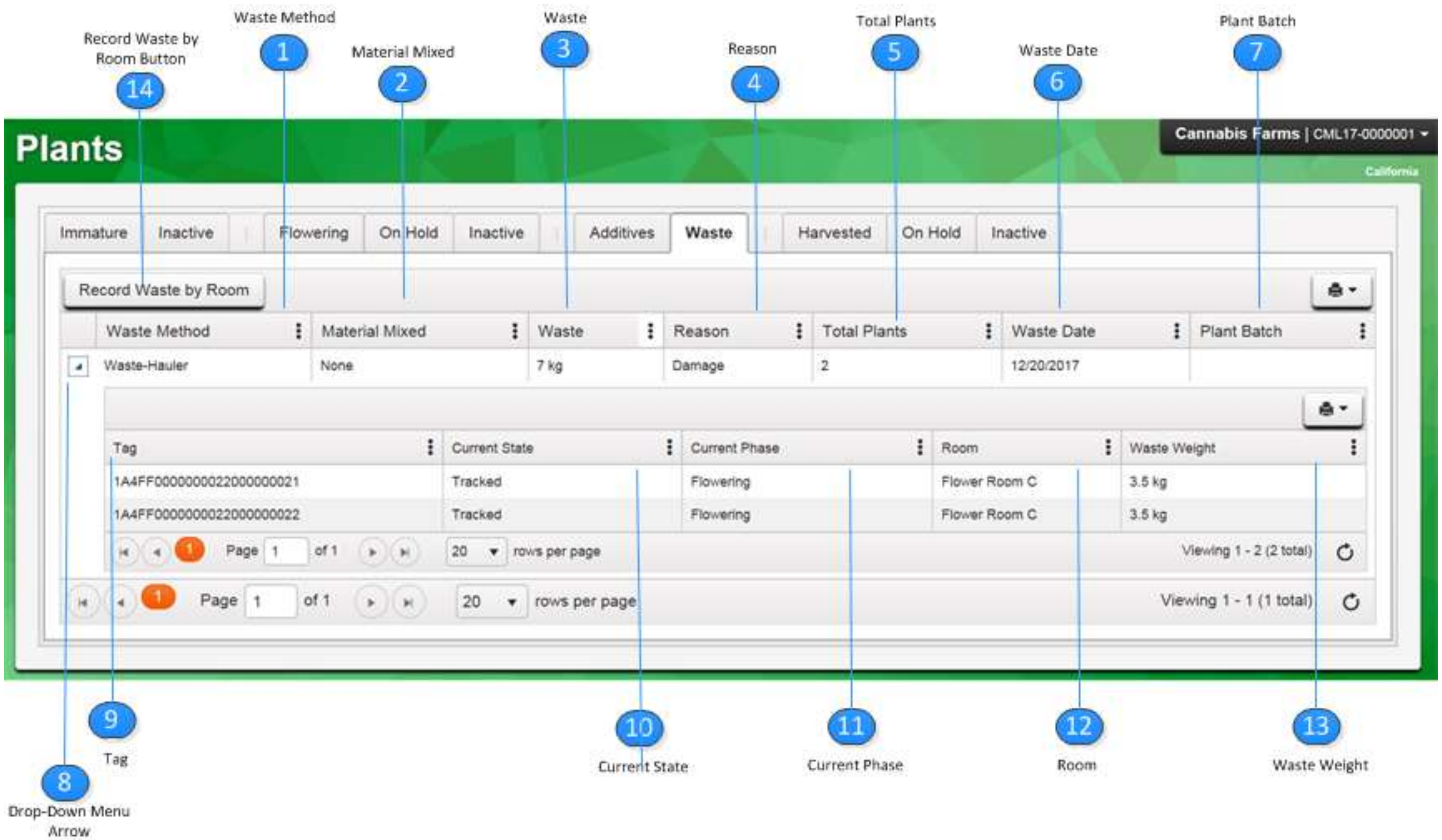
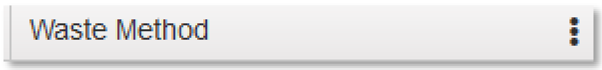


Exhibit 44: The Waste Tab

1

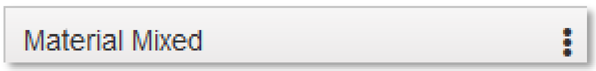
Waste Method



This field identifies how the waste was handled. Waste methods defined by the State are: *Compost*, *Self-Haul*, or *Waste-Hauler*.

2

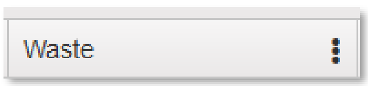
Material Mixed



This field displays any material that was combined with the waste while performing the *Waste Method*.

3

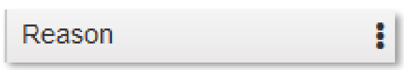
Waste



This field displays the weight of the waste produced.

4

Reason



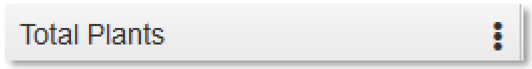
This field explains why the waste occurred. Waste reasons defined by the State are shown in Exhibit 45.

Waste Reason	Reason Usage
Contamination	*Degradation of plant(s) by environmental elements such as pests, filth/foreign material, mold/mildew.*
Damage	*Damage to the plant(s).*
Failure to Thrive	*Failure to grow or develop vigorously.*
Male Plants	*The plant(s) is male.*
Mandated Destruction	*Cannabis plant(s) is destroyed as a result of a State– or local authority–mandated or –supervised process, a response to a health department advisory, or another similar circumstance.*
Pesticides	*Improper usage and application of pesticides on plant(s).*
Pruning	*Cannabis byproduct produced during pruning of plant(s).*

Exhibit 45: State of California Waste Reasons

5

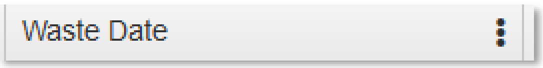
Total Plants



This field displays the total number of plants that produced the waste.

6

Waste Date



This field displays the date the waste event took place.

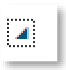
7

Plant Batch

This field displays the *Immature Plant Lot* that produced the waste. This field will be blank for *Flowering Plant* waste.

8

Drop-Down Menu Arrow



This arrow indicates that the file has additional detail available for viewing. Selecting this arrow displays information on the *Flowering Plants* that contributed to the waste event, as shown in Exhibit 46.

Exhibit 46: The Drop-Down Menu Arrow Expands Waste Detail

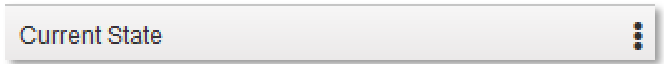
9

Tag

This field displays the *Tag ID* of the *Flowering Plant* that contributed to the waste event.

10

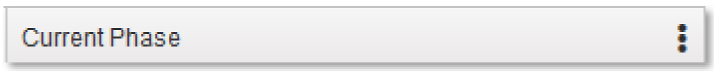
Current State



This field displays the *Current State* of the *Flowering Plant* that contributed to the waste event.

11

Current Phase



This field displays the *Current Phase* of the *Flowering Plant* that contributed to the waste event.

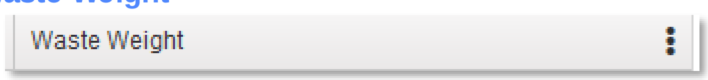
12

Room

This field displays the room where the *Flowering Plant* that contributed to the waste event is located.

13

Waste Weight



This field displays the *Waste Weight* (the total waste weight divided by the number of *Flowering Plants* that contributed to the waste event).

5.4 Importing CSV Files to Record Plant and Harvest Information

Metrc provides the option of making data entries of *Plant* and *Harvest* information using comma separated value (.CSV) files which are uploaded to Metrc using the *Data Import* feature described in Section 9.

The CSV files are most commonly generated from third party software, but can be created manually as well. The *Metrc Mobile* application also creates CSV files for upload using the *Data Import* feature.

5.4.1 Plant and Harvest CSV File Formats

Use the following information when building a CSV file for upload to Metrc:

5.4.1.1 Create Plantings

Fields:
<New Tag ID>,<Plants Type>,<Plants Count>,<Strain>,<New Room>,<not used>,<Planting Date>

Example:
1A4FF0000000022000000200,Clone,25,Bubba Kush,Immature Room A,,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
New Tag ID	*Alphanumeric (24)*	*Yes*	*Immature Plant Lot Tag ID*
Plants Type	*Alphanumeric*	*Yes*	*Valid Values:* *Clone* *Seed*
Plants Count	*Numeric*	*Yes*	*Number of immature plants in new plant lot*
Strain	*Alphanumeric*	*Yes*	*Strain Name exactly as defined in Metrc*
New Room	*Alphanumeric*	*Yes*	*Room Name exactly as defined in Metrc*
Not Used in California	*NA*	*No*	*NA*
Planting Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 47: Create Plantings CSV Record Layout

5.4.1.2 Plantings from Plants

Fields:
<Plant Tag ID>,<New Tag ID>,<Plants Type>,<Plants Count>,<Strain>,<New Room>,<not used>,<Planting Date>

Example:
1A4FF0000000022000000100,1A4FF0000000022000000201,Clone,80,FOG,Immature Room B,,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Flowering Plant from which planting was created*
New Tag ID	*Alphanumeric (24)*	*Yes*	*Immature Plant Lot Tag ID*
Plants Type	*Alphanumeric*	*Yes*	*Valid Values:* *Clone* *Seed*
Plants Count	*Numeric*	*Yes*	*Number of immature plants in new plant lot*
Strain	*Alphanumeric*	*Yes*	*Strain Name exactly as defined in Metrc*
New Room	*Alphanumeric*	*Yes*	*Room Name exactly as defined in Metrc*
Not Used in California	*NA*	*No*	*NA*
Planting Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 48: Plantings from Plants CSV Record Layout

5.4.1.3 Plantings from Packages

Fields:
<Package Tag ID>,<Package Quantity>,<Unit of Measure>,<New Tag ID>,<Plants Type>,<Plants Count>,<Strain>,<New Room>,<not used>,<Planting Date>,<Unpackaged Date>

Example:
1A4FF0100000022000000700,5,Each,1A4FF0000000022000000202,Clone,5,Shark's Breath,Immature Room B,,2018-01-01,2017-12-31

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Package Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Package of Immature Plants from which planting was created*
Package Quantity	*Numeric*	*Yes*	*Quantity of immature plants taken from package to create planting*
Unit of Measure	*Alphanumeric*	*Yes*	*Package unit of measure*
New Tag ID	*Alphanumeric (24)*	*Yes*	*Immature Plant Lot Tag ID*
Plants Type	*Alphanumeric*	*Yes*	*Valid Values:* *Clone* *Seed*
Plants Count	*Numeric*	*Yes*	*Number of immature plants in new plant lot*
Strain	*Alphanumeric*	*Yes*	*Strain Name exactly as defined in Metrc*
New Room	*Alphanumeric*	*Yes*	*Room Name exactly as defined in Metrc*
Not Used in California	*NA*	*No*	*NA*
Planting Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*
Unpackaged Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 49: Plantings from Packages CSV Record Layout

5.4.1.4 Immature Plants Growth Phase

Fields:
<Plant Lot Tag ID>,<Plants Count>,<Starting Tag ID>,<Growth Phase>,<New Room>,<Change Date>,<not used>

Example:
1A4FF0000000022000000200,5,1A4FF0100000022000000300,Flowering,Flower Room B,2018-01-01,

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Lot Tag ID	*Alphanumeric (24)*	*Yes*	*Immature Plant Lot Tag ID*
Plants Count	*Numeric*	*Yes*	*Number of plants being promoted to the Flowering growth phase*
Starting Tag ID	*Alphanumeric (24)*	*Yes*	*Starting Tag ID for Flowering Plants*
Growth Phase	*Alphabetic*	*Yes*	*Valid Values:* *Flowering*
New Room	*Alphanumeric*	*Yes*	*Room Name exactly as defined in Metrc*
Change Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*
Not Used in California	*NA*	*No*	*NA*

Exhibit 50: Immature Plants Growth Phase CSV Record Layout

5.4.1.5 Record Immature Plants Waste

Fields:
<Waste Method>,<Material Mixed>,<Waste Weight>,<Waste Unit of Measure>,<Reason>,<Optional Note>,<Waste Date>,<Plant Batch>

Example:
Compost,Soil,10,Pounds,Failure to Thrive,Frost Damage,2018-01-01,1A4FF0000000022000000150

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Waste Method	*Alphanumeric*	*Yes*	*Valid values:* Compost Self-Haul Waste-Hauler
Material Mixed	*Alphanumeric*	*Yes*	*Material that was combined with the waste while performing the* Waste Method
Waste Weight	*Alphanumeric*	*Yes*	*Weight of waste*
Waste Unit of Measure	*Numeric*	*Yes*	*Unit of measure for waste*
Reason	*Alphanumeric*	*Yes*	*Waste Reason exactly as defined in Metrc - See* Exhibit 39: State of California Waste *Reasons*
Optional Note	*Alphanumeric*	*Optional*	*Explanation of reason for waste*
Waste Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*
Plant Lot Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Immature Plant Lot that produced the waste*

Exhibit 51: Record Immature Plants Waste CSV Record Layout

5.4.1.6 Immature Plants Packages

Fields:
<Plant Lot Tag ID>,<Item>,<Plants Count>,<Package Tag ID>,<Package Date>

Example:
1A4FF0000000022000000205,Immature Shark,1A4FF0100000022000000707,5,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Lot Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Immature Plant Lot that was used to create the package*
Item	*Alphanumeric*	*Yes*	*Item exactly as defined in Metrc*
Package Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Package*
Plants Count	*Alphanumeric*	*Yes*	*Number of immature plants from Plant Lot used in package*
Package Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 52: Immature Plants Packages CSV Record Layout

5.4.1.7 Destroy Immature Plants

Fields:
<Plant Lot Tag ID>,<Plants Count>,<Note>,<Destroy Date>

Example:
1A4FF0000000022000000151,3,Mandated,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Lot Tag ID	*Alphanumeric (24)*	*Yes*	*Immature Plant Lot Tag ID*
Plants Count	*Numeric*	*Yes*	*Number of plants destroyed*
Note	*Alphanumeric*	*Yes*	*Explanation of reason for immature plant destruction*
Destroy Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 53: Destroy Immature Plants CSV Record Layout

5.4.1.8 Plants Room

Fields:
<Plant Tag ID>,<New Room>,<Move Date>

Example:
1A4FF0000000022000000520,Flower Room C,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID for Flowering Plant*
New Room	*Alphanumeric*	*Yes*	*Room Name exactly as defined in Metrc*
Move Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 54: Plants Room CSV Record Layout

5.4.1.9 Record Plants Waste

Fields:
<Waste Method>,<Material Mixed>,<Waste Weight>,<Waste Unit of Measure>,<Reason>,<Optional Note>,<not used>,<Waste Date>,<Plant Tag ID(s)>

Example - Waste Event Involving Multiple Plants:
Self-Haul,NA,5,Pounds,Pruning,Frostbit,,2018-01-01,1A4FF0000000022000000210|1A4FF0000000022000000215

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Waste Method	*Alphanumeric*	*Yes*	*Valid values:* Compost Self-Haul Waste-Hauler
Material Mixed	*Alphanumeric*	*Yes*	*Material that was combined with the waste while performing the* Waste Method
Waste Weight	*Alphanumeric*	*Yes*	*Weight of waste*
Waste Unit of Measure	*Numeric*	*Yes*	*Unit of measure for waste*
Reason	*Alphanumeric*	*Yes*	*Waste Reason exactly as defined in Metrc - See* Exhibit 39: State of California Waste *Reasons. Must match exactly.*
Optional Note	*Alphanumeric*	*Optional*	*Explanation of reason for waste*
Not Used in California	*NA*	*No*	*NA*
Waste Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*
Plant Tag ID(s)	*Alphanumeric (24)*	*Yes*	*Tag ID of Flowering Plant that produced the waste.* *Multiple Plant Tag IDs can be specified separated by a '|'.*

Exhibit 55: Record Plants Waste CSV Record Layout

5.4.1.10 Manicure Plants

Fields:
<Plant Tag Id>,<Manicure Weight>,<Manicure Unit of Measure>,<Drying Room>,<Harvest Name>,<not used>,<Manicure Date>

Example:
1A4FF0000000022000000322,5,Kilograms,Drying Room A,Bubba Kush Manicure,,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Flowering Plant that was manicured*
Manicure Weight	*Alphanumeric*	*Yes*	*Weight of manicure harvest*
Manicure Unit of Measure	*Numeric*	*Yes*	*Unit of measure for manicure harvest*
Drying Room	*Alphanumeric*	*Yes*	*Room Name exactly as defined in Metrc*
Harvest Name	*Alphanumeric*	*Optional*	*Name assigned to the manicure harvest. If not specified, Metrc will assign a Harvest Name.*
Not Used in California	*NA*	*No*	*NA*
Manicure Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 56: Manicure Plants CSV Record Layout

5.4.1.11 Harvest Plants

Fields:
<Plant Tag Id>,<Harvest Weight>,<Harvest Unit of Measure>,<Drying Room>,<Harvest Name>,<not used>,<Harvest Date>

Example:
1A4FF0000000022000000375,10,Kilograms,Harvest Room,Blue Dream Harvest,,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Flowering Plant that was harvested*
Harvest Weight	*Alphanumeric*	*Yes*	*Weight of harvest*
Harvest Unit of Measure	*Numeric*	*Yes*	*Unit of measure for harvest*
Drying Room	*Alphanumeric*	*Yes*	*Room Name exactly as defined in Metrc*
Harvest Name	*Alphanumeric*	*Optional*	*Name assigned to the harvest. If not specified, Metrc will assign a Harvest Name.*
Not Used in California	*NA*	*No*	*NA*
Harvest Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 57: Harvest Plants CSV Record Layout

5.4.1.12 Destroy Plants

Fields:
<Plant Tag ID>,<Reason Note>,<Destroy Date>

Example:
1A4FF0000000022000000151,Mandated,2018-01-01

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Plant Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Flowering Plant that was destroyed*
Reason Note	*Alphanumeric*	*Yes*	*Explanation of reason for destroying the plant*
Destroy Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*

Exhibit 58: Destroy Plants CSV Record Layout

5.4.1.13 Packages from Harvests

Fields:
<Package Tag ID>,<not used>,<Item>,<Package Unit of Measure>,<not used>,<Package Date>,<Production Batch Number>,<Harvest Name>,<Harvest Quantity>,<Harvest Quantity Unit of Measure>

Example 1 - Package with Single Harvest (Non-Production Batch):
1A4FF0100000022000000800,,Shark Flower,Pounds,,2018-03-01,,Shark-2018.3.11-H,12,Pounds

Example 2 - Package with Multiple Harvests (Production Batch):
1A4FF0100000022000000801,,Shark Kief,Kilograms,,2018-03-01,PB 2018.03.01 Shark,2018-01-01-Shark-M,10,Kilograms
1A4FF0100000022000000801,,Shark Kief,Kilograms,,2018-03-01,PB 2018.03.01 Shark,2017-12-15-Shark-H,15,Kilograms

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in the file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Package Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Package being created*
Not Used in California	*NA*	*No*	*NA*
Item	*Alphanumeric*	*Yes*	*Item exactly as defined in Metrc*
Package Unit of Measure	*Numeric*	*Yes*	*Unit of measure for package*
Not Used in California	*NA*	*No*	*NA*
Package Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*
Production Batch Number	*Alphanumeric*	*Optional*	*Production Batch Number (if applicable)*
Harvest Name	*Alphanumeric*	*Yes*	*Name of harvest used in package*
Harvest Quantity	*Alphanumeric*	*Yes*	*Quantity of harvest used in package*
Harvest Quantity Unit of Measure	*Numeric*	*Yes*	*Unit of measure for harvest quantity*

Exhibit 59: Packages from Harvests CSV Record Layout

NOTE: Once a CSV is imported successfully, there is no way to automatically reverse the import. Any corrections will have to be performed manually.

6 Packages

Information relating to the package process includes the following:

1. An immature plant can be packaged and transferred for sale. Only Nursery Licensees can cultivate immature plants for sale.
2. When a manufacturer is creating a concentrate that will then be used in multiple infused production batches, the concentrate must be created as a new package. The infused production batches will then be created from the concentrate package.
   A. The new package of concentrate is a production batch and will then be partially used in an infused product or sold to a customer.
   B. This makes it more easily recorded as connected to the finished infused product package.
3. Packages made at a manufacturer facility that creates concentrates must be created by pulling from other packages.
4. A package must exist in order for it to be selected for transfer. Transfers are real-time inventory dependent.
5. There must be a contents section for each new package created from an existing package.
6. When adjusting a package, use the appropriate adjustment reason.
7. In order for a distributor to send a sample for testing, a test sample package must be created. A new test sample must have a new RFID package tag and be pulled from an existing package.
8. Package tags may only be used once and may not be reused.

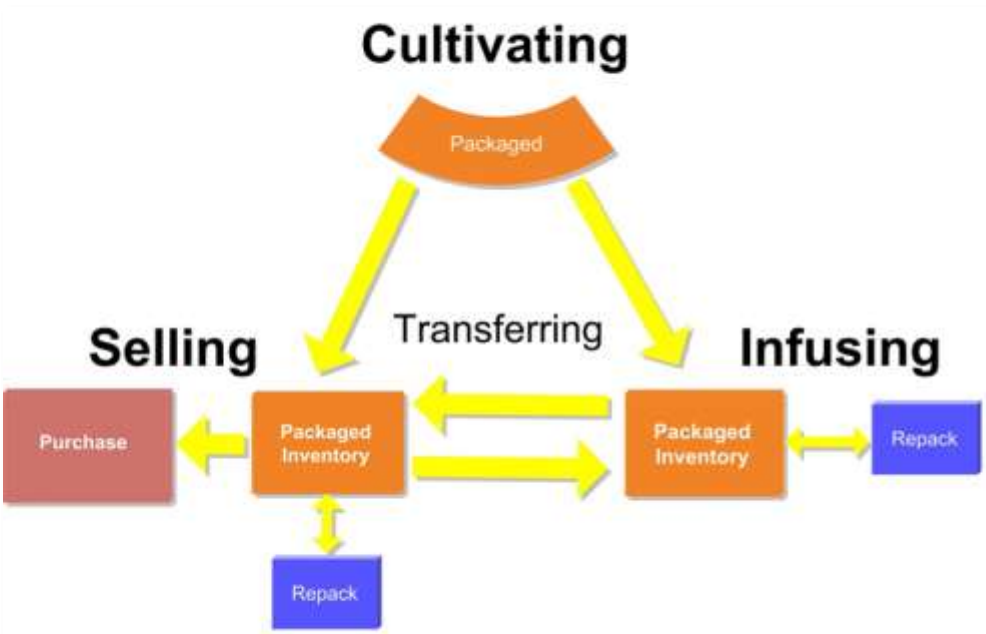


Exhibit 60: The Package Life Cycle

6.1 Package Tag

The *Package Tag* is designed to identify and track the chain of custody of cannabis and cannabis products. It breaks into two (2) pieces as described below, and uses a pressure sensitive adhesive so the tag can be affixed to the associated package.

Exhibit 61: Package Tag

1

Perforation

The *Package Tags* are perforated, as shown in Exhibit 61.

2

Upper Portion

The *Upper Portion* stays with the package as shown in Exhibit 62 below.

Exhibit 62: The Upper Portion of the Tag Remains with the Package

3

Lower Portion

The *Lower Portion* can be used to label a display container or lab paperwork in order to identify the associated Package. All buds must be in final package form. Bud jars are not allowed.

6.1.1 Package Tag Details

The detailed information printed on each *Package Tag* as marked in Exhibit 63 is described below.

Exhibit 63: Package Tag Information

1

License Facility Name

CANNABIS FARMS, LLC

The *License Facility Name* is identified on the package tag.

2

Facility License Number

CML18-9999999

The *Facility License Number* is printed on the package tag.

3

Package Tag Order Number

Order #9999-999-999999

The *Package Tag Order Number* is printed on the *Package Tag*. This identifies which order number this particular *Package Tag* was a part of.

4

Unique Tag Number

1A4FF01000000C9000000101

The unique individual ID (UID) number is encoded on the tag in numeric, barcode, and radio frequency ID (RFID) formats. The barcode printed on the tag is a standard UCC 128 barcode. Metrc generates the ID numbers automatically and assigns them to a facility.

5

Cannabis Identifier

CANNABIS

Cannabis is printed on the package tag to easily identify that the package contains cannabis or a cannabis product.

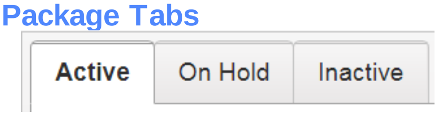
6.2 Package Search

The *Packages* page is accessed by selecting *Packages* in the top navigation bar. Clicking on the *Active* tab displays active packages in the inventory of the licensee as shown in Exhibit 64.

Exhibit 64: The Packages Page

A user can search for a package in the license inventory by filtering and sorting on the columns in the package grid. See Section 3.5 for information on using the filter functionality in Metrc.

Package Tabs



Only packages in the inventory of the licensee may be viewed. The available tabs include: *Active, On Hold* and *Inactive*.

The *Active* tab shows the active packages currently at the facility.

The *On Hold* tab displays any packages that have been placed on administrative hold by the State of California.

The *Inactive* tab displays packages that have been discontinued or finished and are no longer active at the facility.

Package Information

Each of these fields can be used to sort and filter the package data. The *UOM* (unit of measure), *Packaged By* and *Received From* columns are hidden by default, but can be shown using the *Columns Settings* menu. See Section 3.5.2 for information on changing the *Column Settings*.

3

Expand Arrow

This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow next to a *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. The *Lab Results* tab is selected in the example shown in Exhibit 65.

Exhibit 65: Package Details

Lab Results

The *Lab Results* tab displays the details of each individual lab test performed on the package. A *Document Download* button is available on each row on the *Lab Results* tab to view the associated certificate of analysis (which the laboratory staff uploads when test results are recorded).

History

The *History* tab displays a log of every event related to the package.

Req'd (Required) Lab Test Batches

The *Req'd Lab Test Batches* tab displays only for packages containing lab test samples. This tab shows the list of *Lab Test Batches* marked as required by the licensee when creating the test sample. California is not currently utilizing this feature of Metrc, so no data will be populated on the *Req'd Lab Test Batches* tab.

4

New Packages Button

Select this button to launch the *New Packages* page to record starting inventory during initial transition, to re-package an existing package, to split a package into multiple packages, or to combine multiple packages into a single package. This button is also used to record product remediation when the package that failed laboratory testing is remediated and re-packaged.

5

Submit for Testing Button

Select this button to launch the *Submit for Testing* page to create a sample package for laboratory testing. This button is enabled only for Distributors and Microbusinesses.

6

Remediate Button

Select this button to launch the *Remediate Packages* page to record the remediation of a package that failed laboratory testing if the product and remediation method did not require the remediated product be re-packaged. Otherwise, select the *New Packages* button to record the product remediation. This button is enabled only for Manufacturers and Microbusinesses.

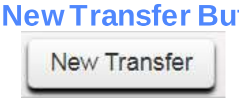
7

Create Plantings Button

Select this button to launch *the Create Plantings from Packages* page to create a new immature plant lot from a package of immature plants. This button is enabled only for Cultivators and Microbusinesses.

8

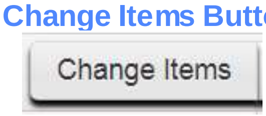
New Transfer Button



Select this button to launch the *New Transfer* page to transfer a package(s) to another annual licensee.

9

Change Items Button



Select this button to launch the *Change Items* page to update the *Item* designated for the package.

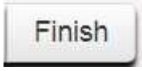
10

Adjust Button

Select this button to launch the *Adjust Packages* page to update the quantity contained in a package.

11

Finish Button



Select this button to launch the *Finish Packages* page to inactivate a package with a quantity of zero.

12

Discontinue Button

Select this button to discontinue a package that was created in error. Once a package has been modified in any way or transferred it can no longer be discontinued.

6.3 Creating Packages from Harvest Batch

Creating packages from a harvest batch is initiated by selecting the *Create Packages* button on the *Plants* page - *Harvested* tab

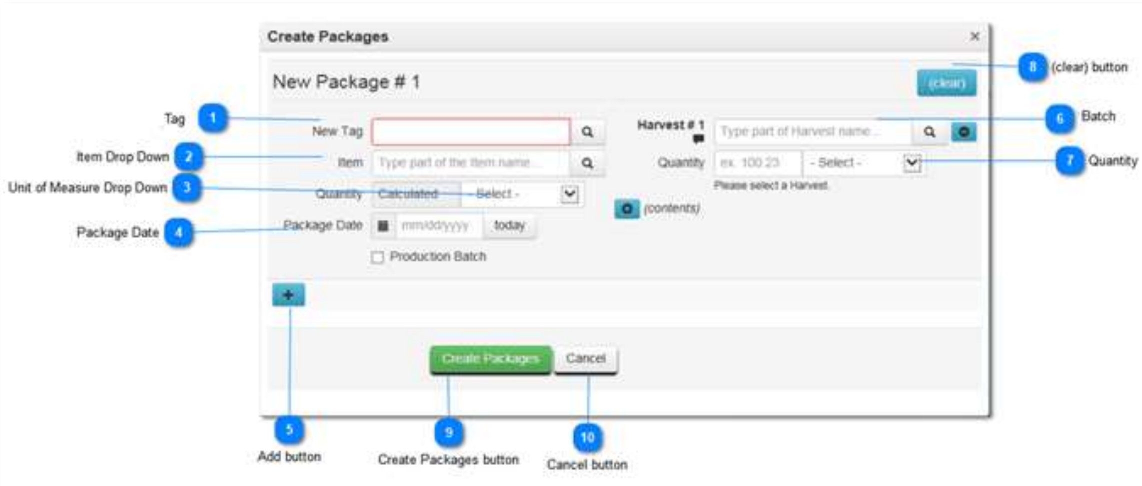


Exhibit 66: Creating Packages from Harvest Batch

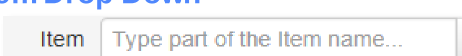
1

Tag

Use this field to identify a specific *Metrc RFID Package Tag* to be associated with this package being made.

2

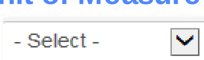
Item Drop Down



Use this field to identify what item the new package contains.

3

Unit of Measure Drop Down



Use this drop-down to choose the weight basis unit of measure for this package.

4 Package Date

Enter the date the package is being made (or use the today button to enter the current date).

5 Add Button

Select this button to create another package simultaneously.

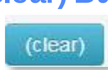
6 Batch

Specify the *Harvest Batch* this particular package should be pulled from. Use the magnifying glass to display a list of all active harvest batches.

7 Quantity

Enter the weight of the product being taken from the harvest and put into the current package.

8 (clear) Button

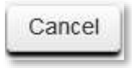


Select this button to clear the current information that has been entered into the fields for this package being created.

9 Create Packages Button

Select this button to create the package(s) in Metrc.

10 Cancel Button



Select this button to cancel the *Create Packages* area and return to the previous page.

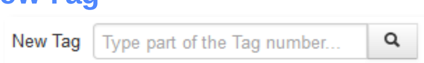
6.4 Creating Packages from Existing Package(s)

Creating packages from an existing package(s) is initiated by selecting the *New Packages* button on the *Packages* page - *Active* tab.

Exhibit 67: Creating Packages from Existing Packages

1

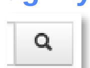
New Tag



Enter the new package tag number associated with the new package being currently created, as shown in Exhibit 67.

2

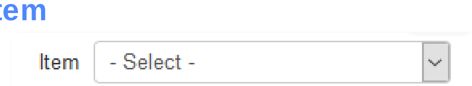
Magnifying Glass Button



Select this button to display a list of available *Package Tag* numbers currently available for use.

3

Item

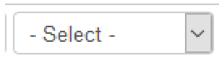


Use this drop-down to identify the *Item Name* of the product currently being created.

4
Quantity

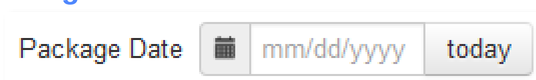
Enter the weight-based product, volume-based product, or count-based items for the package being created.

5
Unit of Measure Drop Down



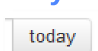
Use this drop-down to select the unit of measure for the current package being created. This will be weight-based, volume-based, or count-based.

6
Package Date



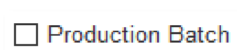
Enter the date upon which the package is being created (or use the *today* button described below).

7
Today Button



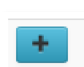
Select this button to enter the current date.

8
Production Batch check



Use this checkmark to identify a production batch (such as *Concentrates, Infused Edibles,* or *Infused Non-edibles*).

9
Add Button



Select this button to add another new package to be created simultaneously. Every package must contain a contents section.

10

Package #1

Identify the package(s) being pulled from to create the new package(s).

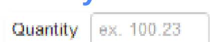
11

Subtract Button

Select this button to remove the current contents of a package. Keep in mind that every package must have a contents section.

12

Quantity



Enter the quantity of weight-based, volume-based or count-based product(s) being used to create the new package.

13

Unit of Measure

Use this drop-down to identify the current unit of measure for the package being pulled from to create the new package.

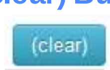
14

Add Button

Select this button to add another contents package, if pulling inventory from multiple packages.

15

(clear) Button



Use this button to clear all entries that have entered into the current sections.

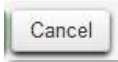
16

Create Packages Button

Select this button to create the new package(s) that need to be created.

17

Cancel Button



Select this button to exit the current page without making any new packages and return to the previous page.

6.4.1 Manufactured Batch Process

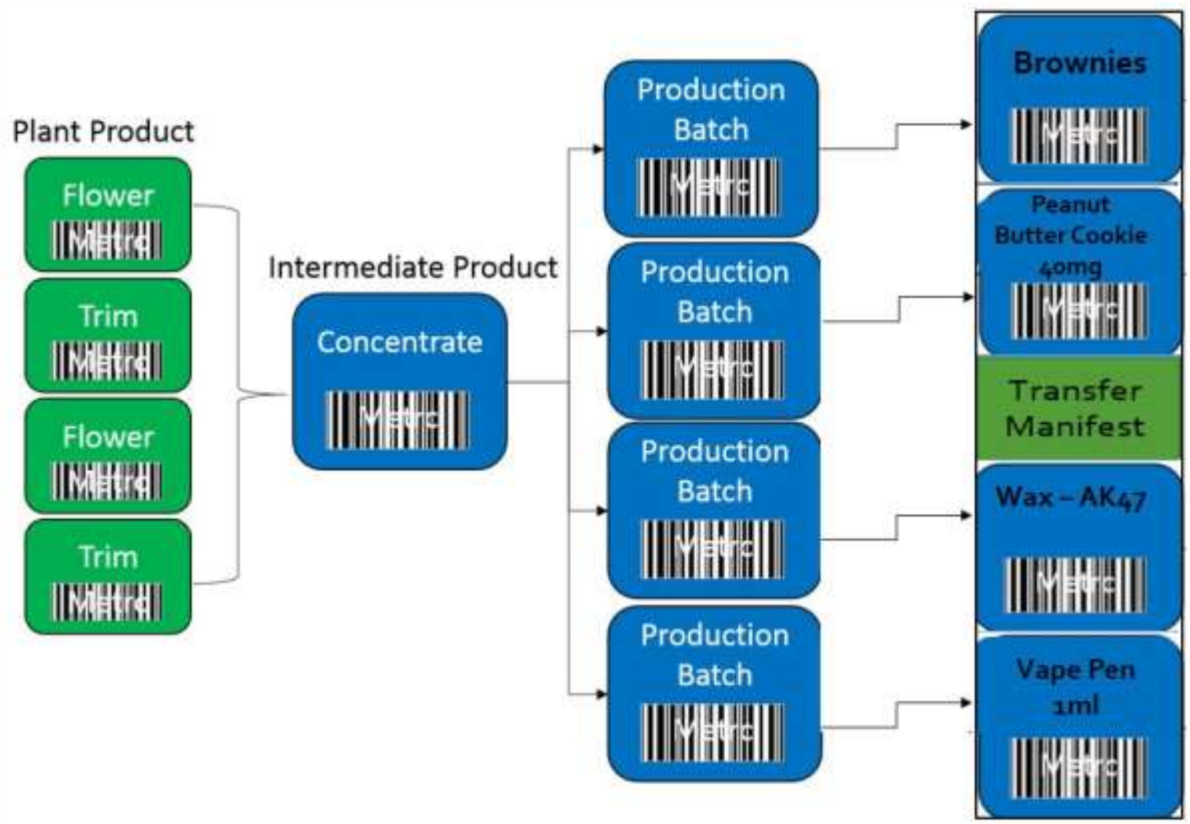


Exhibit 68: Each Unique ID Number Connects to the One that Preceded It

Exhibit 68 shows how several bags of flower and leaf were transferred into the manufacturing facility from another location via the transfer process. The flower and leaf were then converted to an intermediate product (*Production Batch of Concentrate*) for use in a larger batch. In the example above, we could call it butter. The butter is then used to bake a large batch of peanut butter cookies, say 1000. The larger batch of 1000 cookies is then broken down and packaged to be transferred and shipped. Using this example, it is critical to understand that each intermediate step requires a new package tag. Follow the process above and note how each unique ID number is connected to each unique ID number preceding it, and how the chain is kept intact.

6.5 Package Adjustments

Package Adjustments is a tool to adjust the weight, volume, or quantity of a Metrc package. Adjustments are not used to correct sales in a store. Package adjustment reasons are set by the State. A note section is available for the licensee to explain why that package adjustment was made.

The *Adjust Packages* page shown in Exhibit 69 is accessed by selecting the *Adjust button* option the *Packages* page.

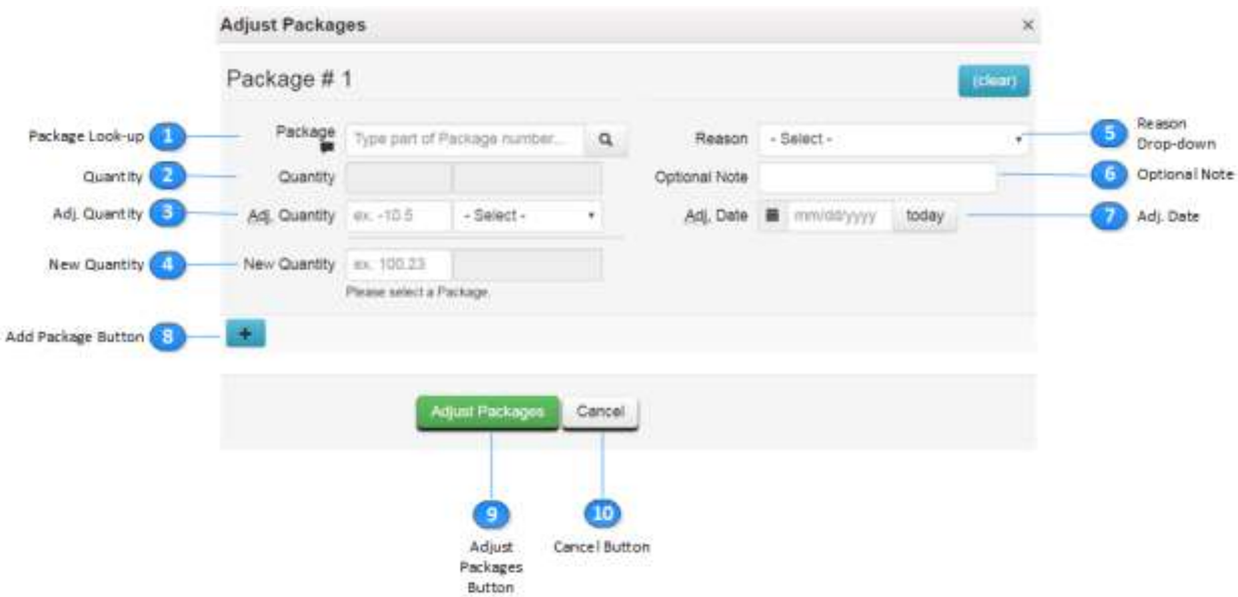
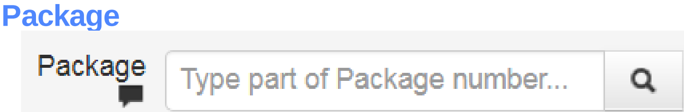


Exhibit 69: The Adjust Packages Page

1

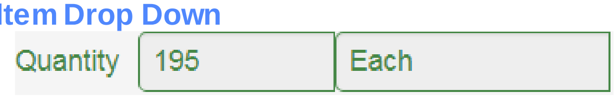
Package



Use this field to identify the *Package Tag ID* to be adjusted. The *Package* must be selected before entering values in any other fields on the page.

2

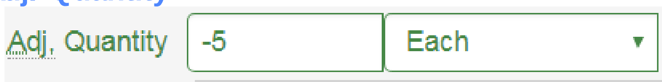
Item Drop Down



Quantity is a read-only only field displaying the current quantity in the selected *Package*.

3

Adj. Quantity

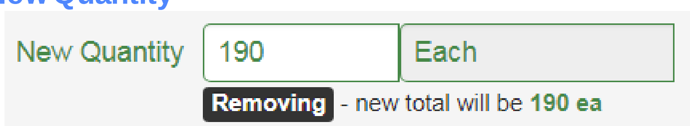


Use this field to increase or decrease the quantity in the selected *Package*. Use a negative number as shown in the example to decrease the quantity and a positive number to increase the quantity.

The user can choose to enter an *Adj. Quantity* or a *New Quantity*. When a value is entered in the *Adj. Quantity* field, the amount in the *New Quantity* field is automatically calculated when the user clicks out of the *Adj. Quantity* field.

4

New Quantity



Use this field to specify the *New Quantity* in the selected *Package*.

The user can choose to enter a *New Quantity* or an *Adj. Quantity*. When a value is entered in the *New Quantity* field, the amount in the *Adj. Quantity* field is automatically calculated when the user clicks out of the *New Quantity* field.

5

Reason Drop-Down

Use the *Reason* drop-down to indicate why the Package is being adjusted. See Section 6.5.1 below for the list of *Adjustment Reasons* defined by the State of California.

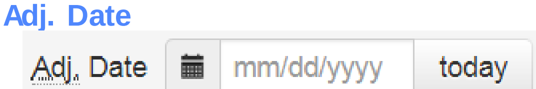
6

Optional Note

Use the *Optional Note* field to provide further explanation of the circumstances that lead to the need to adjust the package.

7

Adj. Date



Enter the date the package is being adjusted (or use the today button to enter the current date).

8

Add Button

Select this button to record another package adjustment simultaneously.

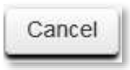
9

Adjust Packages Button

Select this button to process the package adjustment in Metrc.

10

Cancel Button



Select this button to disregard the entries made on the *Adjust Packages* page and return to the *Packages* page.

6.5.1 Adjustment Reasons

All adjustment reasons shown in Exhibit 70 are defined by the State of California, not Metrc.

Adjustment Reason	Reason Usage
Display Sample	*Any amount of cannabis or cannabis product used for display purposes in a licensed designated retail area.*
Enforcement Testing	*Under order of state and/or local jurisdiction, samples removed from a licensee's inventory for enforcement related analysis.*
Free Medicinal Cannabis Goods	*Cannabis goods that are provided to a medicinal cannabis patient or primary caregiver without compensation.*
Incorrect Quantity	*Package received via transfer that was not correctly weighed or counted. This should not be used to correct sales. If the package quantity varies significantly, it should be rejected.* *Notes section should be used to explain the error.*

Adjustment Reason	Reason Usage
Mandated Destruction	*Cannabis plant(s) or package(s) destroyed as a result of a State– or local authority–mandated or –supervised process, a response to a health department advisory, or another similar circumstance.*
Onsite Testing	*To indicate testing on a licensed premise for the purposes of quality assurance of the product in conjunction with reasonable business operations.* *Note: Not to be used for official state testing*
Over Pulled	*Too much product was placed in a new Metrc package, resulting in less product remaining in the originating package than is reflected in Metrc. This requires a note indicating the corresponding package that was under pulled.* *Notes section should be used to explain the error.*
Oversold	*Over reported sales from the package.* *Notes section should be used to explain the error.*
Research & Development	*Adjustment used to indicate product was used for Research and Development*
Sample Tested	*Used by laboratories during official state testing to report quantities of a sample used during the testing process.* *FOR LAB USE ONLY*
Scale Variance	*When there is a measurable difference in the weight of the product due to a scale.*
Spoilage	Deterioration of packaged product.
Theft	*Discrepancy in cannabis product inventory due to theft; State should be notified.*
Under Pulled	*Too little product was placed in a new Metrc package, resulting in more product remaining in the originating package than is reflected in Metrc. This requires a note indicating the corresponding package that was over pulled.* *Notes section should be used to explain the error.*
Undersold	*Underreported sales from the package.* *Notes section should be used to explain the error.*
Voluntary Surrender	*In coordination with state and/or local jurisdiction, indicates that the cannabis product was voluntarily surrendered and no longer in the licensee's possession.*
Waste (Unusable Product)	*Cannabis or cannabis product rendered and disposed of per licensing authority regulations.*
Weight Change Due to Moisture	*Packaged cannabis product's weight has increased or decreased due to moisture content change.*

Exhibit 70: State of California Adjustment Reasons

6.5.2 Importing CSV Files to Record Package Adjustment Information

Metrc provides the option of making data entries for *Package Adjustments* using a comma separated value (.CSV) files which is uploaded to Metrc using the *Data Import* feature described in Section 9.

The CSV file is most commonly generated from third party software, but can be created manually as well. The *Metrc Mobile* application also creates a Package Adjustment CSV file for upload using the *Data Import* feature.

6.5.2.1 Package Adjustment CSV File Format

Use the information below when building a Package Adjustment CSV file for upload to Metrc.

<u>Fields</u>:
<Package Tag ID>,<Quantity>,<Unit of Measure>,<Reason>,<Optional Note>,<Adjustment Date>,<Employee ID>

<u>Example</u>:
1A4FF0100000022000000710,-25.25,Grams,Theft,,2017-07-15,John.Jones@CanFarm.Com

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in your file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Package Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Package being adjusted*
Quantity	*Alphanumeric*	*Yes*	*Amount of package adjustment - positive (+) to increase quantity and package and negative (-) to decrease quantity*
Unit of Measure	*Numeric*	*Yes*	*Unit of measure for adjustment*
Reason	*Alphanumeric*	*Yes*	*Reason for the adjustment. See Exhibit 70. Must match exactly.*
Optional Note	*Alphanumeric*	*Optional*	*Explanation of the adjustment*
Adjustment Date	*MM/DD/YYYY or YYYY-MM-DD*	*Yes*	*US Short Date or ISO 8601 Date*
Employee ID	*Alphanumeric*	*Yes*	*Metrc Username of the employee taking the adjustment action*

Exhibit 71: Package Adjustment CSV Record Layout

NOTE: Once a CSV is imported successfully, there is no way to automatically reverse the import. Any corrections will have to be performed manually.

7 Transfers

Metrc functionality to facilitate the transfer process is accessed from the *Transfers* menu in the top navigation bar.

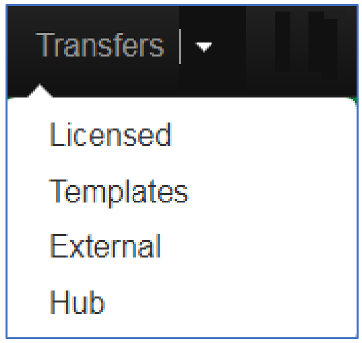


Exhibit 72: The Transfer Menu

Information related to the transfer process includes the following:

1. A transfer must be created anytime a package moves from one licensee to another, even if the two facilities are located on the same property.
2. To print a manifest, select the manifest number to highlight it in orange, then select the *View Manifest* button and select *Print*.
3. Packages can only be transported from one licensee to another by a licensed Distributor. A Testing Laboratory is allowed to transport test samples for official state testing. Distributors and Testing Laboratories are required to record the actual departure time from the origin facility and the actual arrival time at the destination facility in Metrc real-time.
4. A package must be received in its entirety (the system DOES NOT allow receiving a partial package).
5. A transfer can be rejected by individual package, or in whole by rejecting all packages.
6. A rejected package requires the originating Licensee to receive the package back into inventory.
7. A package must exist in order to be selected for transfer. Transfers are done in real time and are inventory dependent.
8. When receiving a package, any adjustments to the weight, volume, or count may be reported to the State.
9. If there are any questions about a transfer, reject it.

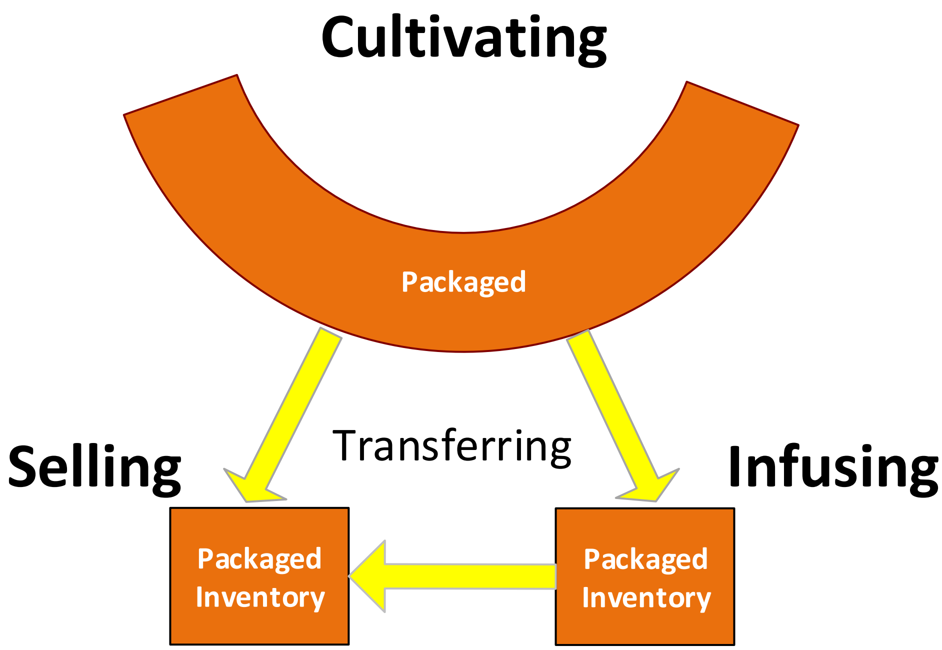


Exhibit 73: The Transfer Process

7.1 Licensed Transfers

A *Licensed Transfer* is a Metrc term for the transfer of cannabis or cannabis products between Annual Licensees.

7.1.1 Creating a Licensed Transfer

All information entered into the manifest fields on the *New Licensed Transfer* page shown in Exhibit 74 is required and can be saved and printed in PDF format. Save a copy of the manifest for your records. Print a copy for the driver. Read all rules and regulations regarding transferring and transfer manifests provided by the State of California to ensure that the transfer is in compliance.

The *New Licensed Transfers* page is accessed by selecting the *Licensed* option from the *Transfers* menu in the top navigation bar.

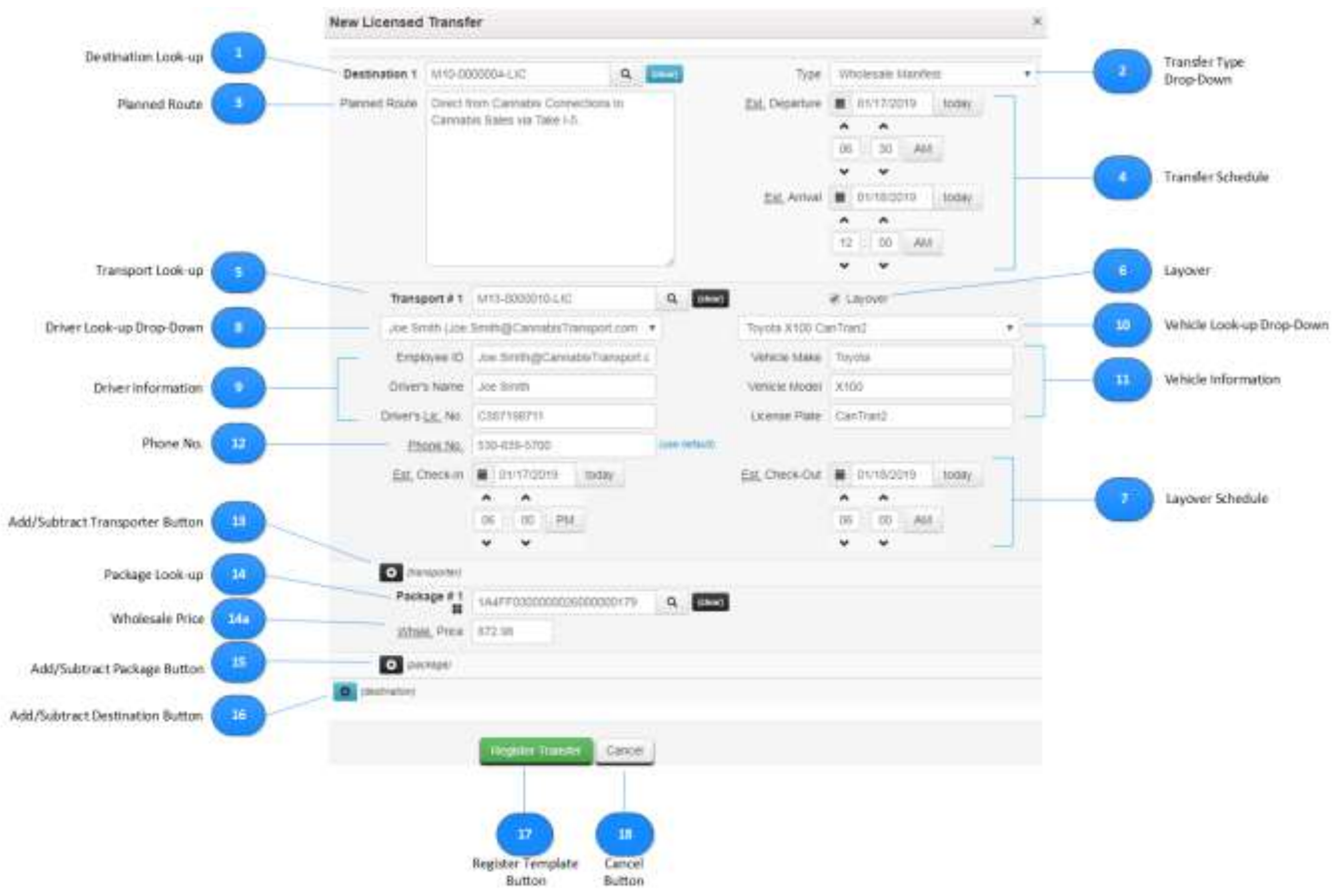


Exhibit 74: Creating a New Licensed Transfer

1

Destination Look-up

Use this field to select the location to transfer to. Use the magnifying glass to find the location in the list of all actively licensed businesses, which is sorted in numerical order by license number.

2

Transfer Type Drop-down

Use this drop-down to select the kind of transfer to perform. *Transfer Types* and their usage are outlined in Exhibit 75 below.

Transfer Type	Transfer Type Usage
Transfer	*Used for all transfers except transfers requiring the use of a Wholesale Manifest or Return manifest.*
Return	*A Return transfer is used only for the transfer of defective manufactured products back to the originating licensee.*
Wholesale Manifest	*A Wholesale Manifest transfer is used when transferring products to a Retailer licensee.* *When a Wholesale Manifest is used, the originator is required to record the wholesale price of each package in the transfer.* *A Microbusiness functioning as a Distributor with a transfer that includes a Retailer licensee, or another Microbusiness licensee functioning as a Retailer, shall follow the process above.* *It is recommended that Nurseries utilize a Wholesale Manifest when transferring seeds or immature plants to a Retailer.*

Exhibit 75: State of California Licensed Transfer Types

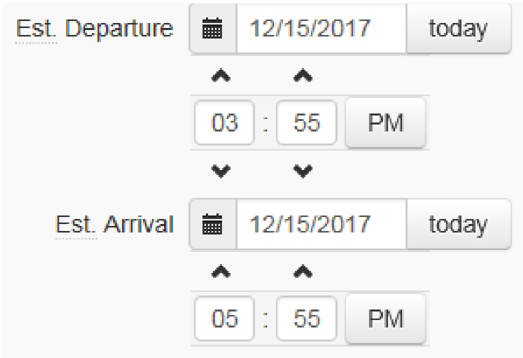
3

Planned Route

Use this field to specify the route to be taken for each leg of a transfer. If the transfer is going from one location to another, only one route should be entered. For multi-destination transfers, complete one field for each leg of the transfer. The field shown is for an individual leg of the transfer.

4

Transfer Schedule



Use the schedule to enter the estimated date/time for the departure, and expected date/time for the arrival of the shipment. Data can be manually entered or selected using the calendar date/time functions.

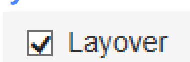
5

Transport Look-up

Use this field to select the Distributor or Laboratory licensee that will transport the package(s). Use the magnifying glass to display a list of all actively licensed Distributors and Laboratory licensees. The list is initially sorted alphabetically by license name and then by license number, but it can be sorted and filtered as needed.

6

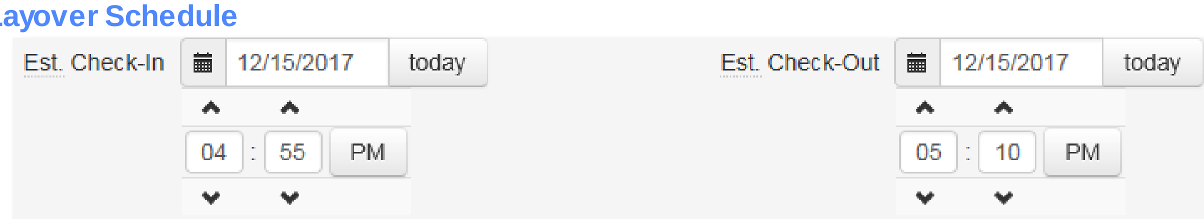
Layover Checkbox



Check this checkbox if there will be a stop between the origin and destination facility. This will display the *Layover Schedule* fields.

7

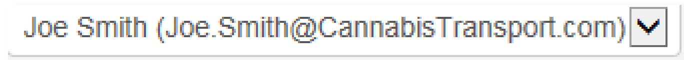
Layover Schedule



Use the schedule to enter the estimated check-in date/time at the layover location, and the estimated check-out date/time at the layover location. Data can be manually entered or created using the calendar/time functions.

8

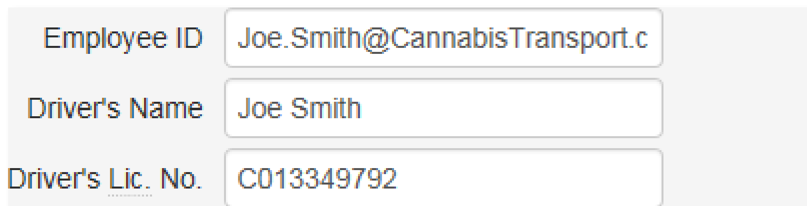
Driver Look-up Drop-down



This drop-down displays a list of drivers previously entered into the *Driver Information* field. This includes *Employee ID, Driver's Name,* and *Driver's Lic. No*. Driver information is not associated with vehicles.

9

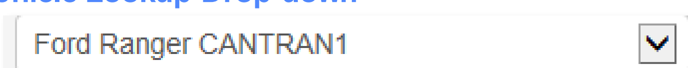
Driver Information



Add each new driver's information, providing complete information for future use. The *Employee ID* is a required field that can be used at the licensee's discretion to record an employee internal business ID number or other distinguishing employee identifier.

10

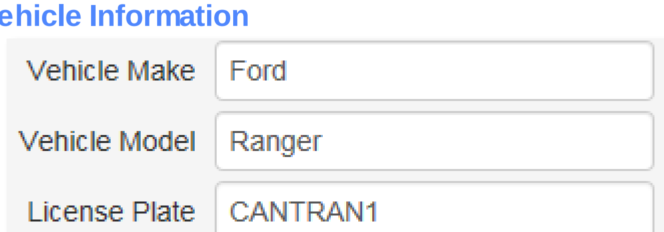
Vehicle Lookup Drop-down



This drop-down displays a list of vehicles previously entered into the *Vehicle Information* field. This includes *Vehicle Make, Vehicle Model,* and *License Plate.* Vehicle information is not associated with the driver.

11

Vehicle Information



Add each new vehicle's information, providing complete information for future use. This includes *Vehicle Make, Vehicle Model,* and *License Plate.*

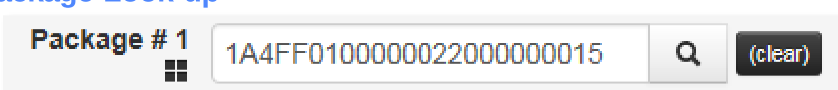
12 Phone No.

Use this field to specify the phone number to display in the *Contact Phone No. for Inquiries* field on the manifest. Selecting the *use default* hyperlink populates the field with the main phone number of the originating facility.

13 Add/Subtract Transporter Button

Use the black *Add* (plus) button to add additional transporters to a manifest as required. Only add transporters for each destination on a manifest. For multiple destinations, add transporters to each individual destination (do not add all transporters to a single destination).
The black *Subtract (minus)* button removes the corresponding transporter from the transfer manifest. This button only displays when a subsequent transporter has been added.

14 Package Look-up



Use this field to select packages in inventory to include in a transfer that have not previously been included in the transfer. Use the magnifying glass to display a list of all packages in inventory.

14a Wholesale Price

When a *Transfer Type* of *Wholesale Manifest* is used to transfer packages to a Retailer, a *Wholesale Price* field displays. *Wholesale Price* is a required field.

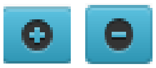
15

Add/Subtract Package Button

Press the black *Add* (plus) button to add additional packages to a manifest as required. Only add packages for each destination on a manifest. For multiple destinations, add packages to each individual destination (do not add all packages to a single destination).
Press the black *Subtract (minus)* button to remove the corresponding packages from the transfer manifest. This button only displays when a subsequent package has been added.

16

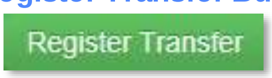
Add/Subtract Destination Button



Select this button to add an additional destination. When a new destination is added, new fields display for completion, including *Destination, Route, Schedule,* and *Package*.
Press the black *Subtract* (minus) button to remove the corresponding destination from the transfer manifest. This button only displays when a subsequent destination has been added.

17

Register Transfer Button

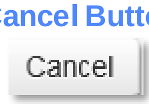


Select this button to finalize the manifest creation process and make it available to all parties named in the transfer.

After a transfer has been created/registered, it is viewable by the licensee that created it as Outgoing, by the licensee receiving it as Incoming, and by the State. Transfers can be scheduled in advance for as many facilities as desired, and for as many packages as needed, as long as the transfer meets regulations.

18

Cancel Button



Select this button to prevent the transfer/manifest from being created.

Remember:

- A transfer cannot be generated for a package that has not been created. Only live packages can be added to a transfer manifest and shipped.
- Metrc is a reporting system. All transfers should be completed based on all applicable State of California rules and regulations. Metrc does not replace, alter, or change any rules or regulations. Consult your Licensing Authority for further information on how to manifest products.

7.1.2 Licensed Transfer – Outgoing Tab

The *Originating* facility can view outbound transfers on the *Outgoing* tab of the *Licensed Transfers* page shown in Exhibit 76.

Exhibit 76: The Licensed Transfers Page – Outgoing tab

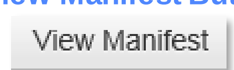
1

New Transfer Button

This button launches the *New Licensed Transfer* page so a transfer manifest form can be created.

2

View Manifest Button



Select this button to look at any existing manifest. First highlight the manifest for viewing. The new manifest is created in PDF format so this will take a few moments. The manifest can then be printed.

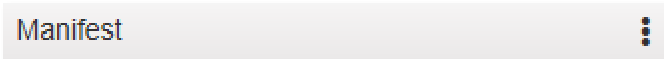
3

Manifest View Tabs

Only manifests for the location the user is in may be viewed. Three available options include:
Incoming, Outgoing and *Rejected*

4

Manifest



This field displays the unique manifest number. To the right of the unique manifest number are package detail icons. These icons provide an at-a-glance view of the packages in the transfer. See Section 3.3 Common Elements for more information on package icons. The user can hover over each icon to determine its meaning.

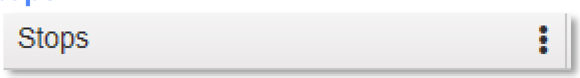
5

Destination

This field displays the *Destination(s)* of the transfer. If there is more than one *Destination*, the value in the field displays as “(multi-destination)” and the user can use the *Drop-Down Menu Arrow* to view all *Destination* information.

6

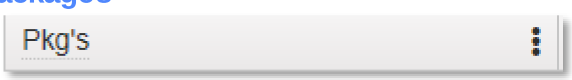
Stops



This field displays the number of stops (destinations) specified on the manifest.

7

Packages



This field displays the number of packages being moved in that transfer, along with the other corresponding information.

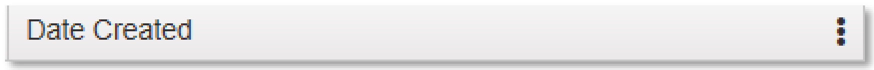
8

Employee

This field displays the employee at the facility that created the manifest.

9

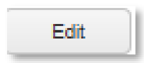
Dated Created



This field displays the date the manifest was created.

10

Edit Button



Select this button to allow the originating facility to edit the manifest details until the time a transfer leaves the facility.

11

Void Button

Select this button to allow the originating facility to void the manifest details until the time a transfer leaves the facility.

12

Expand Arrow

This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow to next to the *Manifest* number provides information about the *Destinations* included on the manifest.

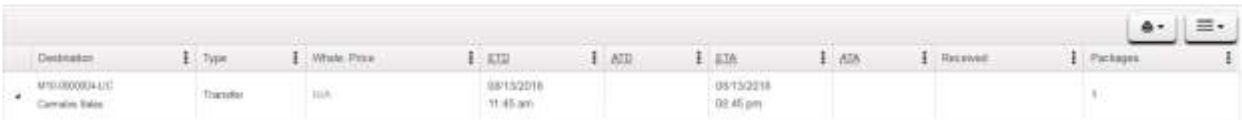


Exhibit 77: Manifest Destinations

Selecting the expand arrow to next to each *Destination* provides information about the *Transporter(s)* and *Package(s)* specific to that *Destination*.

Exhibit 78: Destination Transporter and Package Information

Selecting the expand arrow to next to each *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. See Section 6.2 for more information about the content of these tabs.

Remember:

- Each field with the symbol can be filtered and sorted (see search functions for more details).
- Use the *Expand Arrow* to review all information about that manifest.

7.1.3 Viewing a Manifest

When the *Register Transfer* button is selected on the *New Licensed Transfer* page, a pop-up message is displayed confirming the registration and providing a link to view the manifest. Clicking inside the pop-up opens the PDF version of the manifest in a new browser ta**b.** Exhibit 79 below shows an example of the pop-up displayed when using a Chrome browser. The type of browser being used and the browser notification settings may impact the behavior of this pop-up.

Exhibit 79: The Transfer Confirmation Message

A manifest can also be viewed by selecting the *View Manifest* button. The *View Manifest* button is available in the *Incoming, Outgoing* and *Rejected* pages. Select the manifest before selecting the *View Manifest* button.

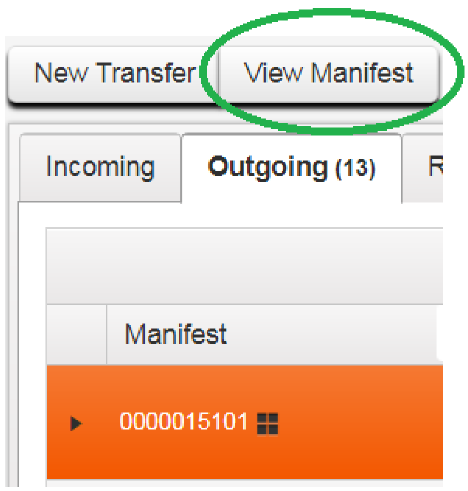


Exhibit 80: The View Manifest Button

Once the appropriate manifest has been highlighted and the *View Manifest* button has been selected, a new browser tab launches and the manifest opens as a PDF file.

NOTE: Viewing the manifest requires adjusting the computer settings to allow popups from Metrc.

The manifest can be printed or saved from *View Manifest* using the browser's Print and Save buttons.

NOTE: Be sure to print the manifest for the driver before he/she leaves the facility.

7.1.4 Modifying a Transfer

A transfer can be modified as shown in Exhibit 81, or voided, up until the time that the Distributor or Testing Laboratory marks that it has departed the facility. Once the transfer process has begun, the transfer may not be modified except by the Distributor or Testing Laboratory to edit estimated departure and arrival times, or driver and vehicle information (see *Edit Transporter Info* below).

When modifying transfers, each of the transfer fields may be modified at the same level of detail as when the transfer was created. Edits may be completed for a variety of reasons including: error correction, changes in destination, changes in product, etc. The transfer process is a key component of the chain of custody process, and modifying a transfer manifest should be handled appropriately.

To modify a transfer, navigate to the *Outgoing* tab on the *Licensed Transfers* page (see Section 7.1.2). Locate the proper transfer and select the *Edit* button.

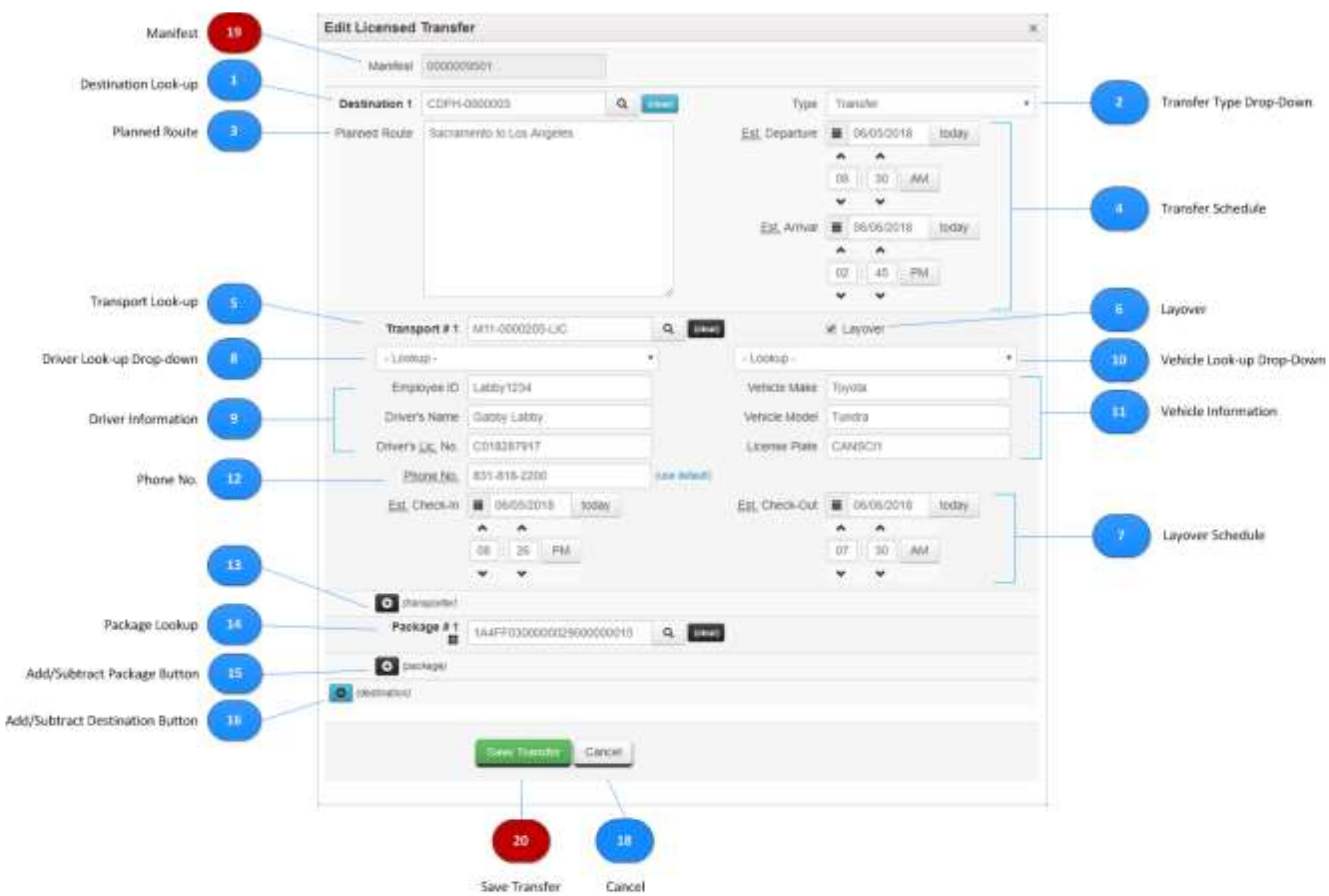


Exhibit 81: The Edit Licensed Transfer Page

The *Edit Licensed Transfer* page shown in Exhibit 81 shares many elements with the *New Licensed Transfer* page (blue annotations). Please see the Section 7.1.1 above for a description of these shared elements. The elements unique to the *New Licensed Transfer Template* page (red annotations) are described below.

19

Manifest

This field displays the unique manifest number.

20

Save Transfer Button

Select this button to save the updates to the manifest and make the updated manifest available to all parties named in the transfer.

Remember:

New packages can be added or packages may be removed. However, packages cannot be adjusted from the *Transfer* page. If a package must be adjusted, remove it from the transfer to make the adjustment. After the package has been adjusted, it can be added back into the transfer.

7.1.5 Voiding a Transfer

Voiding a transfer can only be completed by the originating business. Voiding a transfer permanently eliminates it and moves the product back into the originator's inventory. To void a transfer, navigate to the *Outgoing* tab on the *Licensed Transfers* page (see Section 7.1.2). Locate the proper transfer and select the *Void* button.

After the *Void* button is selected, a prompt displays asking to confirm the void, as shown in Exhibit 82. Press *OK* to confirm the void.

Exhibit 82: Void Transfer Confirmation Message

Once a transfer has been voided, it cannot be reinstated and all associated packages will be returned to the transfer originator's inventory.

7.1.6 Licensed Transfer – Incoming Tab

The *Destination* facility can view incoming transfers on the *Incoming* tab of the *Licensed Transfers* page shown in Exhibit 83.

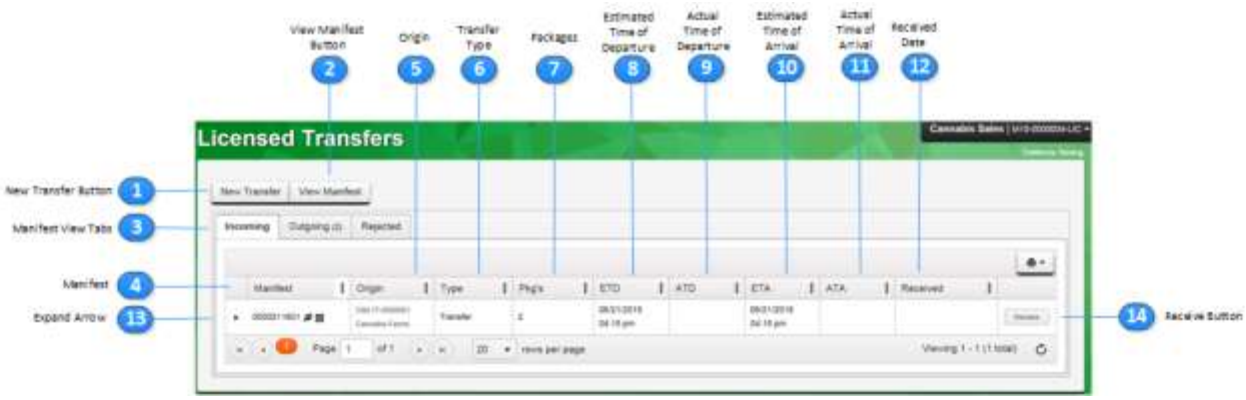


Exhibit 83: The Licensed Transfers Page - Incoming Tab

1

New Transfers Button

New Transfer

Select this button to launch the *New Transfer* page so a transfer manifest form can be created.

2

View Manifest Button

View Manifest

Select this button to look at any existing manifest. First highlight the manifest for viewing. The new manifest is created in PDF format so this will take a few moments. The manifest can then be printed.

3

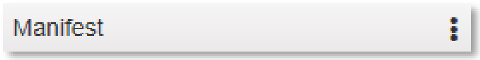
Manifest View Tabs

Incoming | Outgoing | Rejected

Only manifests for the location the user is in may be viewed. The available tabs include: *Incoming, Outgoing* and *Rejected*.

4

Manifest



This field displays the unique manifest number. To the right of the unique manifest number are package detail icons. These icons provide an at-a-glance view of the packages in the transfer. See Section 3.3 Common Elements for more information on package icons. The user can hover over each icon to determine its meaning.

5

Origin

This field displays the location where the transfer was created, along with the other corresponding information.

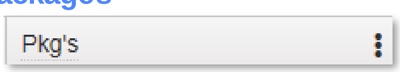
6

Type

This field displays the kind of transfer being performed. *Transfer Types* include: *Transfer, Return,* and *Wholesale Manifest*. See Exhibit 75 above for a description of each *Type*.

7

Packages



This field displays the number of packages being moved in a transfer, along with other corresponding information.

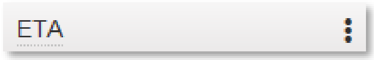
8

ETD (Estimated Time of Departure)

This field displays the time the transfer will leave the point of origin entered into the transfer manifest for that transfer.

9

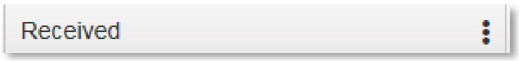
ETA (Estimated Time of Arrival)



This field displays the time the transfer should arrive at the destination entered in the transfer manifest for that particular transfer.

10

Received



This button displays the time the recipient of the transfer selected the *Receive* button. This may or may not correspond to the drop off time. It is important for the receiving licensee to select the *Receive* button as soon as the product is received and verified in order to avoid discrepancies.

11

Expand Arrow

This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow to next to the *Manifest* number provides information about the *Transporter(s)* and *Package(s)* included in the transfer.

Exhibit 84: Manifest Transporter and Package Information

Selecting the expand arrow to next to each *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. See Section 6.2 for more information about the content of these tabs.

7.1.7 Receiving a Transfer

Receiving a transfer is the final point of exchange in the chain of custody.

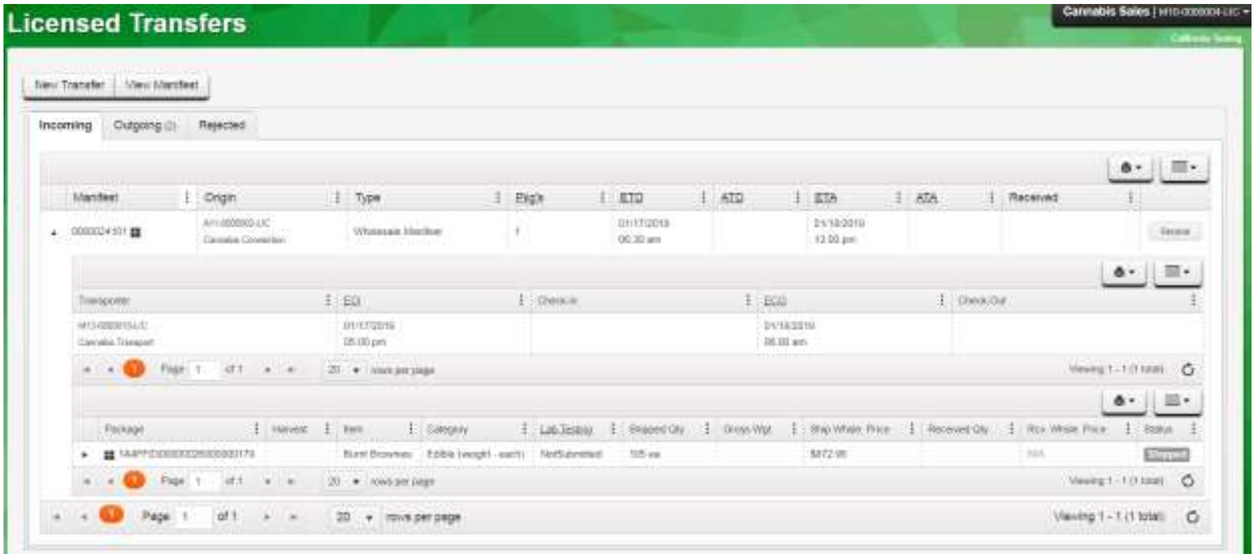


Exhibit 85: Receiving a Transfer

To display the contents of the shipment for review prior to accepting the packages, use the *Drop-Down Menu Arrow* to the left of the transfer *Manifest ID* number as shown in Exhibit 85.

The *Receive* button is on the right side of the transfer manifest, as shown in Exhibit 85. Pressing the *Receive* button does not accept the transfer but rather launches the *Receive Licensed Transfer* page as shown in Exhibit 86 below, which allows the Destination facility to adjust the quantity received, reject the entire transfer, reject specified packages in the transfer, or accept the transfer as is.

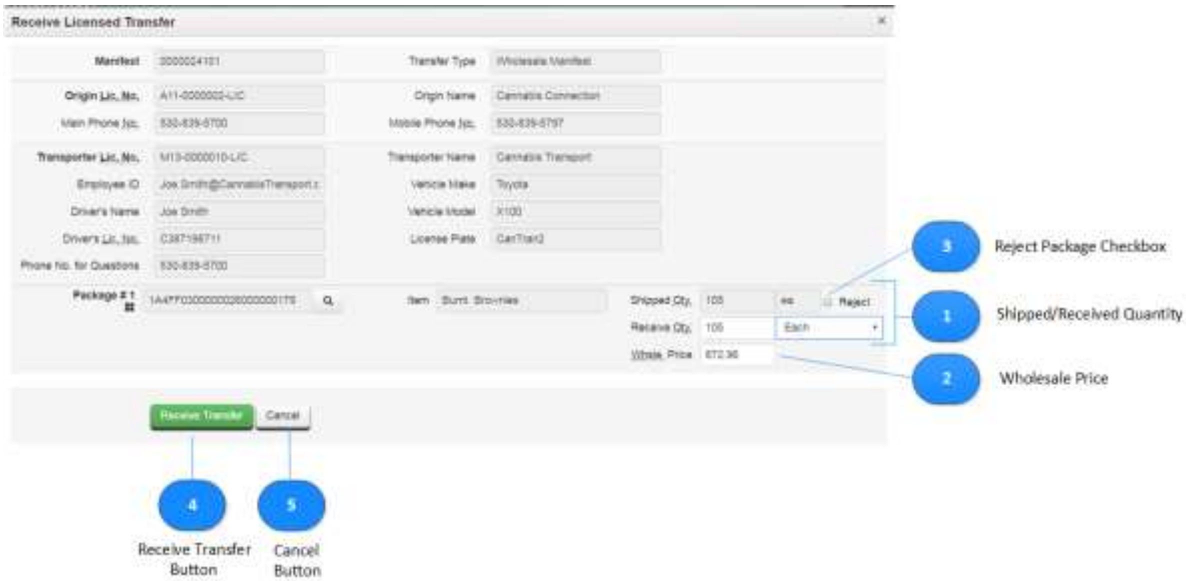
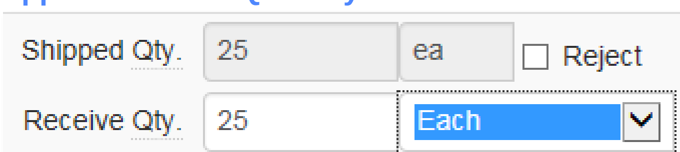


Exhibit 86: The Receive Licensed Transfer Page

1

Shipped/Received Quantity



The *Shipped Quantity (Qty.)* field displays the amount of product that was recorded when the package was created. The same product quantity is auto-populated in the *Receive Quantity* field. Two choices are available if the *Shipped Quantity* does not match the *Received Quantity*:

- Adjust the package in the *Received Quantity* field to correct the variance, or
- Reject the package

2

Wholesale Price

Retailers and Microbusinesses performing licensed Retailer activities: The *Wholesale (Whsle) Price* field displays the wholesale price of the product that was recorded when the transfer was created. If accepting a product in the transfer and the wholesale price is incorrect, enter the correct price in the *Wholesale Price* field.

If the package is accepted, any adjustments entered in the *Received Quantity* and *Wholesale Price* fields display in the *Manifest* details as shown in Exhibit 87.

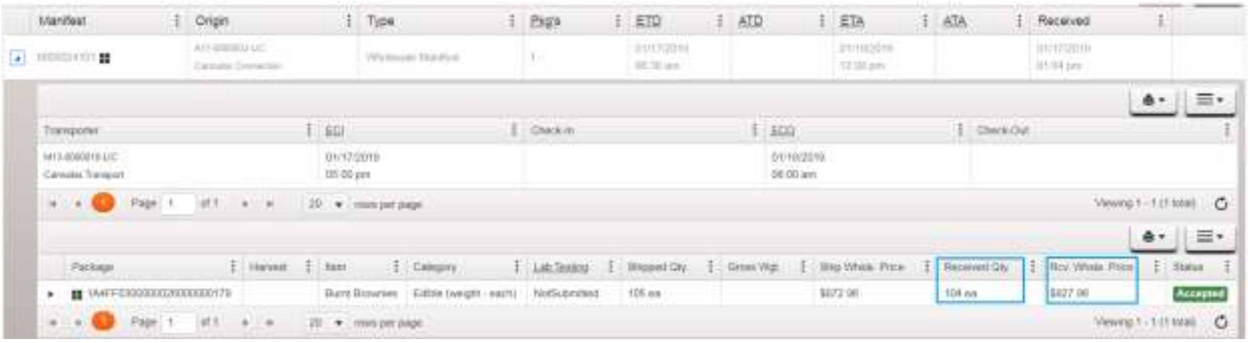
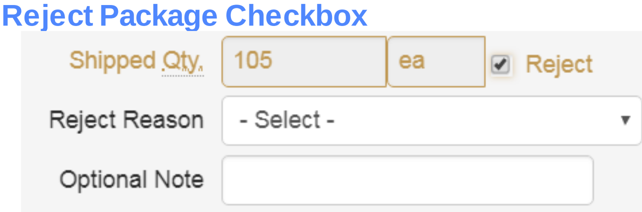


Exhibit 87: Received Quantity and Wholesale Price Adjustments in Transfer Details

3

Reject Package Checkbox



Select this checkbox to allow a single package to be rejected from a transfer without rejecting the entire transfer. To reject a package, select the *Reject* checkbox next to the corresponding package and select a reason from the *Reject Reason* drop-down. An *Optional Note* can also be entered, but is not required. Reasons to reject a package are shown in Exhibit 88.

Rejection Reason	Reason Usage
Damage	*There has been damage to the plant or package.*
Data Entry Error	*A package(s) cannot be accepted by the receiving licensee due to a data entry error that occurred when the manifest was created.*
Incorrect Item (Transfer)	*A manifest was created with the incorrect item and must be rejected.*
Incorrect Quantity	*Package received via transfer that was not correctly weighed or counted. This should not be used to correct sales. If the package quantity varies significantly, it should be rejected.* *Notes section should be used to explain the error.*
Spoilage	*Deterioration of packaged product.*
Theft	*Rejection of a package when product has been stolen in transit.*

Exhibit 88: State of California Package Rejection Reasons

When a package is rejected, the received quantity and unit of measure disappear. Any package not checked will be received. At that point, the user can accept the transfer and the rejected package(s) will remain in the custody of the sender. To reject the entire transfer, check the *Reject* checkbox for all packages in the transfer.

4

Receive Transfer Button

Select this button to accept the transfer and move the packages into the recipient's inventory unless the package(s) have been rejected. Press the *Receive Transfer* button to record the package rejection(s), as well as accepted packages. Rejected packages are returned to the inventory of the facility initiating the transfer. Accepted transfers are added to the inventory of the Destination facility.

5

Cancel Button

Select this button to prevent the transfer/manifest from being received. The *Licensed Transfer* page will display.

7.1.8 Receiving a Rejected Transfer - Rejected Tab

Transfers rejected by the Destination facility appear on the *Rejected* tab, shown in Exhibit 89, of the *Licensed Transfer* page of the Originating facility.

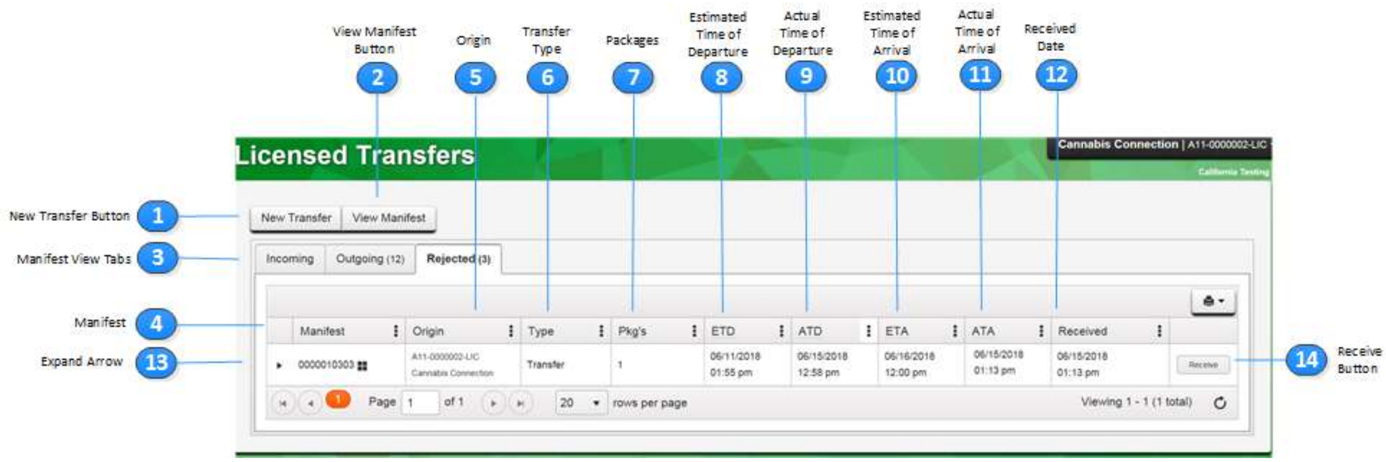


Exhibit 89: Receiving a Rejected Transfer

The *Rejected* tab contains the same elements as the *Incoming* tab. Please see Section 7.1.6 above for a description of these shared elements.

The Originating facility must select the *Receive* button to put rejected packages back into their package inventory.

When the *Receive* button is selected, the *Receive Rejected Transfer* page displays, as shown in Exhibit 90.

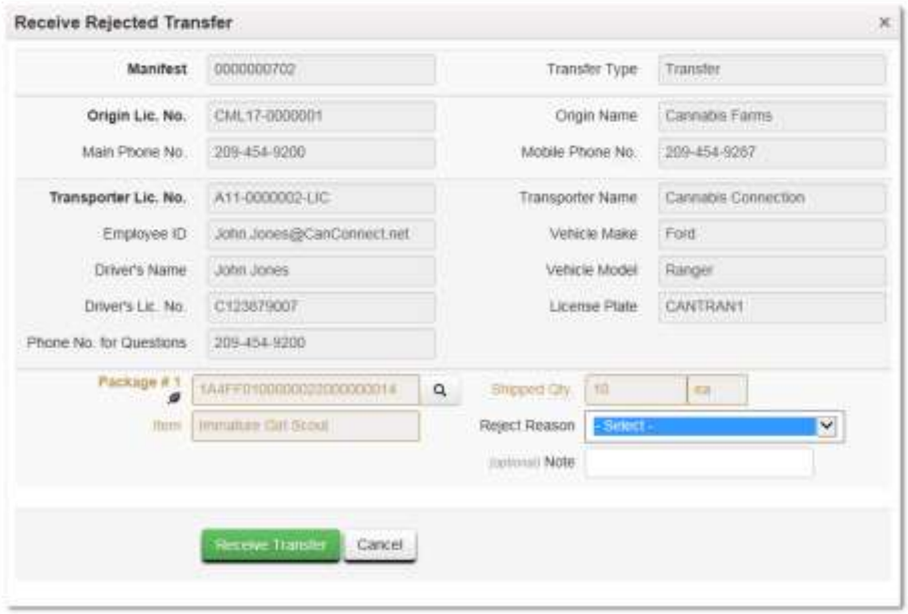


Exhibit 90: The Receive Rejected Transfer Page

The *Received Rejected Transfer* page is very similar to the *Receive Transfer* page, although the only entries that can be made are *Rejection Reason* and *Notes*. Once the *Receive Transfer* button is selected, the rejected package(s) are put back into the facility's package inventory. A reason for rejecting a package must be entered. A note can also be entered but is not required.

7.2 Licensed Transfers Templates

Licensed transfers made on a regular basis to the same *Destination* licensee utilizing the same *Planned Route, Transporter(s), Driver(s)* and/or *Vehicle(s)* can be recorded in Metrc most efficiently when a transfer template is employed.

A template can be used to record these types of transfers with minimal data input to suit the circumstances of a particular transfer and specify the packages to be transferred. The template can also be copied as a starting point to create additional templates.

The *Licensed Transfers Template* page shown in Exhibit 91 is accessed by selecting the *Templates* option from the *Transfers* menu in the top navigation bar.

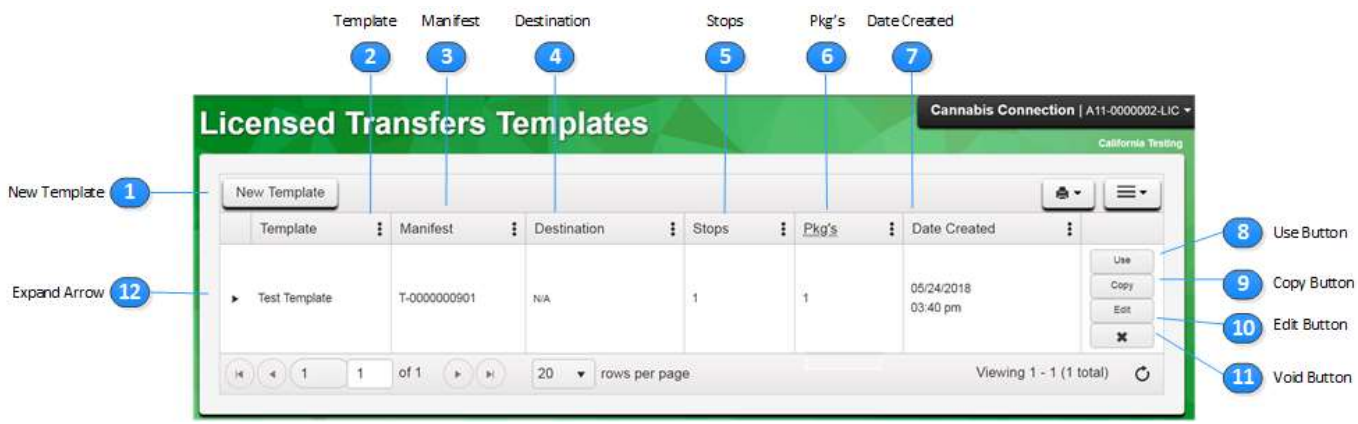
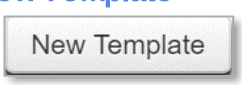


Exhibit 91: The Licensed Transfers Templates Page

1 New Template

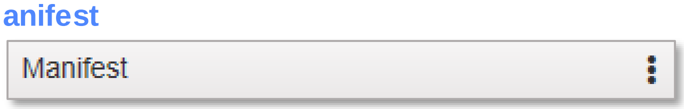


This button launches the *New Licensed Transfer Template* page described in Section 7.2.1 below.

2 Template

This field displays the template name.

3 Manifest



This field displays the unique number assigned to the template.

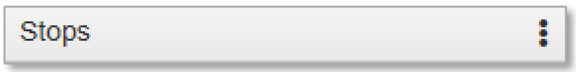
4

Destination

This field displays the *Destination(s)* of the transfer. If there is more than one *Destination*, the value in the field displays as “(multi-destination)” and the user can use the *Expand Arrow* to view all *Destination* information.

5

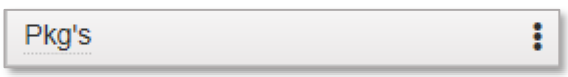
Stops



This field displays the number of stops (destinations) specified on the transfer template.

6

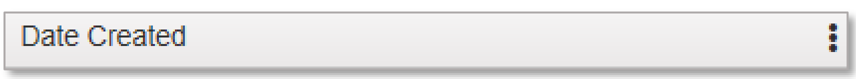
Packages



This field displays the number of packages included on the transfer template. The user can use the *Expand Arrow* to view all *Package* information.

7

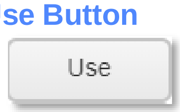
Date Created



This field displays the date the transfer template was created.

8

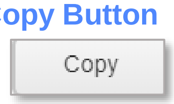
Use Button



This button launches the *New Licensed Transfer* page (see Section 7.1), pre-populated with the values specified on the selected template.

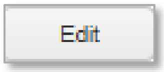
9

Copy Button



This button launches the *New Licensed Transfer Template* page, pre-populated with the values specified on the selected template.

10 Edit Button



This button launches the *Edit Licensed Transfer Template* page populated with values from the selected transfer template. All fields except the template number are editable.

11 Discontinue Button

This button discontinues the selected transfer template so it can no longer be used.

12 Expand Arrow

This arrow indicates that there is additional detail available for the row.

Selecting the expand arrow to next to the *Template* name provides information about the *Destinations* included on the template.

Exhibit 92: Manifest Destinations

Selecting the expand arrow to next to each *Destination* provides information about the *Transporter(s)* and *Package(s)* specific to that *Destination*.

Exhibit 93: Destination Transporter and Package Information

Selecting the expand arrow to next to each *Package* displays tabs containing *Lab Results* (if applicable) and the *History* of the package. See Section 6.2 for more information about the content of these tabs.

7.2.1 Creating Licensed Transfer Templates

To create a template, select the *New Template* button on the *Licensed Transfers Templates* page to access the *New Licensed Transfer Template* page. The *New Licensed Transfer Template* page is used to specify the name of the template and the values to populate in the template.

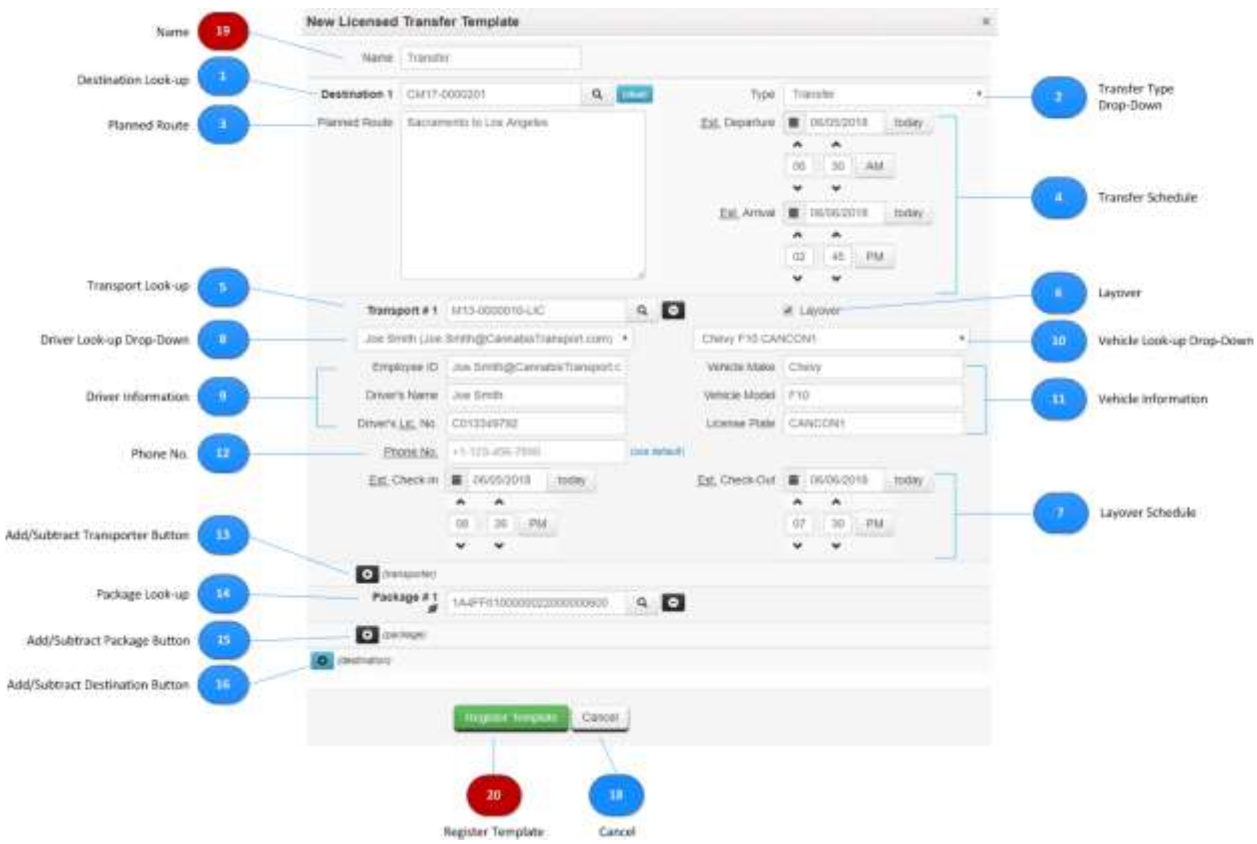


Exhibit 94: The New Licensed Transfer Template Page

The *New Licensed Transfer Template* page shown in Exhibit 94 shares many elements with the *Create a Licensed Transfer* page (blue annotations). Please see the Section 7.1.1 above for a description of these shared elements. The elements unique to the *New Licensed Transfer Template* page (red annotations) are described below.

19

Name

Use this field to specify the name of the transfer template.

20

Register Template Button

Select this button to finalize the creation process and make the transfer template available to create new licensed transfers and additional transfer templates.

7.2.2 Editing Licensed Transfer Templates

Select the *Edit* button associated to the transfer template to be updated on the *Licensed Transfers Templates* page to access the *Edit Licensed Transfer Template* page.

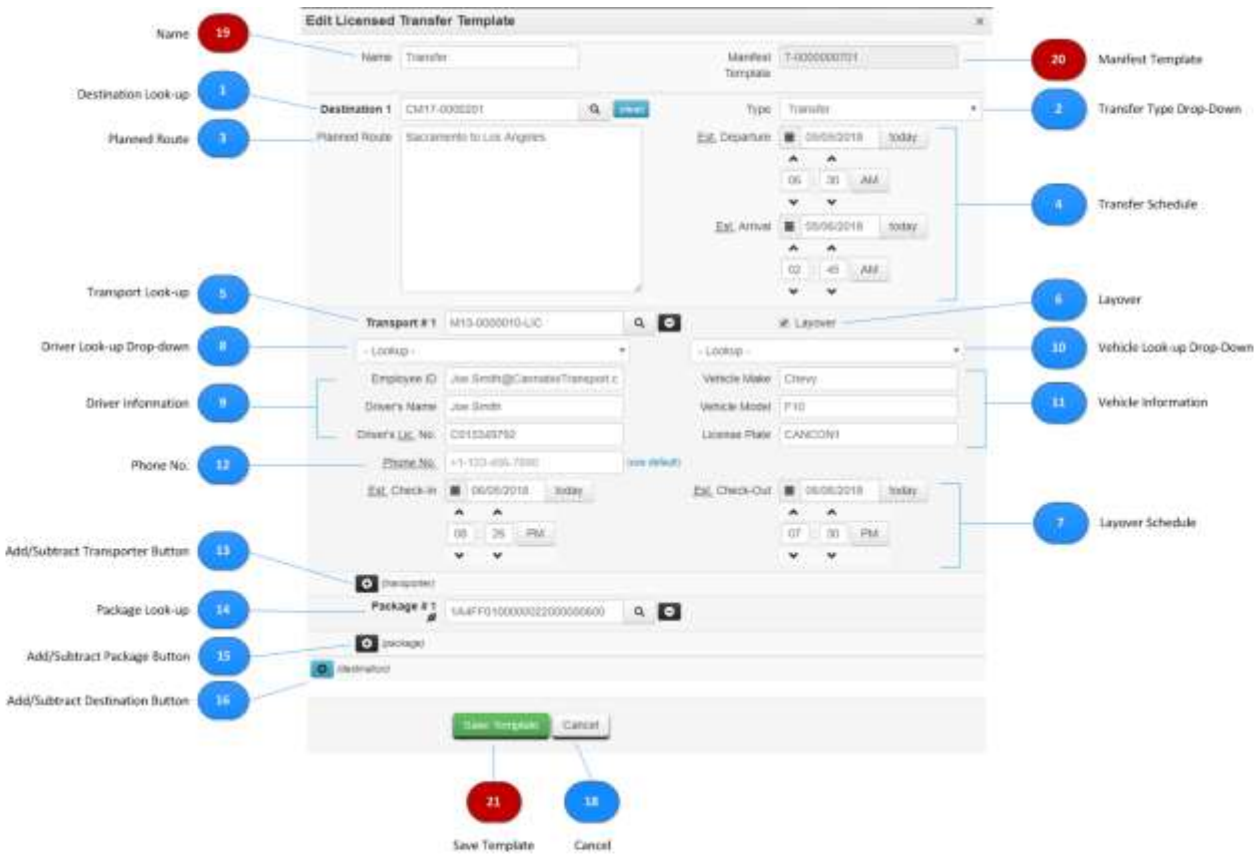


Exhibit 95: The Edit Licensed Transfer Template Page

The *Edit Licensed Transfer Template* page shown in Exhibit 95 shares many elements with the *New Licensed Transfer* page (blue annotations). Please see the Section 7.1.1 above for a description of these shared elements. The elements unique to the *Edit Licensed Transfer Template* page (red annotations) are described below.

19

Name

Use this field to change the name of the transfer template.

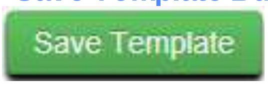
20

Manifest Template

This field displays the unique number assigned to the transfer template.

21

Save Template Button



Select this button to save the changes made to the transfer template.

7.3 External Transfers

An *External Transfer* is a Metrc term for the transfer of cannabis or cannabis products between an Annual Licensee (Metrc enabled) and a Temporary Licensee (non-Metrc enabled).

The process and functionality related to *External Transfers* is provided in the *Transition Period Guide*.

7.4 Transfers Hub

Licensed Distributors and Testing Laboratories use the *Transfers* menu in the top navigation bar to access the *Transfers Hub* page shown in Exhibit 96 to manage transfers.

The *Transfers Hub* page provides Distributors and Testing Laboratories with the ability to view a manifest, edit transporter information, and record actual departure, arrival, layover check-in, and layover check-out dates/times in real-time.

Exhibit 96: The Transfers Hub Page

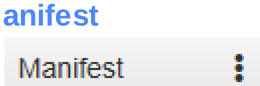
1

View Manifest

Select this button to look at any existing manifest. First highlight the manifest for viewing. The new manifest is created in PDF format so this will take a few moments. The manifest can then be printed.

2

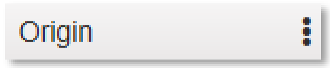
Manifest



This field displays the unique manifest number.

3

Origin



This field displays the *License Number* and *Facility Name* that created the transfer.

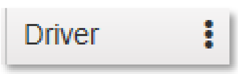
4

Destination

This field displays the *License Number* and *Facility Name* that will receive the transfer.

5

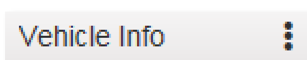
Driver



This field displays the name of the driver assigned to complete the transfer.

6

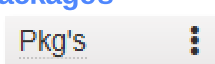
Vehicle Info



This field displays the vehicle assigned to perform the delivery by *Make, Model* and *License Plate Number*.

7

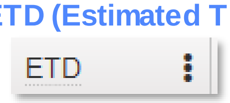
Packages



This field displays the number of packages being moved in that transfer.

8

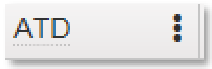
ETD (Estimated Time of Departure)



This field displays the date/time the transfer is scheduled to leave the point of origin as recorded on the transfer manifest for that particular transfer.

9

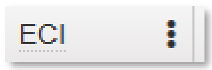
ATD (Actual Time of Departure)



This field displays the date/time the transfer left the point of origin, populated with the date/time the Transporter selected the *Depart* button for the manifest.

10

ECI (Estimated Time of Check-in)



This field displays the date/time the Transporter is scheduled to arrive at the layover location as recorded the transfer manifest for that particular transfer.

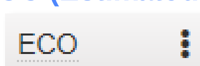
11

Check-in

This field displays the date/time the Transporter arrived at the layover location, populated with the date/time the Transporter selected the *Check-In* button for the manifest.

12

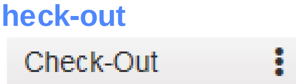
ECO (Estimated Time of Check-out)



This field displays the date/time the Transporter is scheduled to depart from the layover location as recorded the transfer manifest for that particular transfer.

13

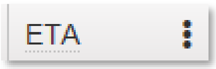
Check-out



This field displays the date/time the Transporter departed from the layover location, populated with the date/time the Transporter selected the *Check-Out* button for the manifest.

14

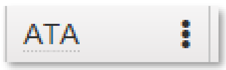
ETA (Estimated Time of Arrival)



This field displays the date/time the transfer is scheduled to arrive at the destination facility as recorded on the transfer manifest for that particular transfer.

15

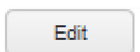
ATA (Actual time of Arrival)



This field displays the date/time the transfer arrived at the Destination facility, populated with the date/time the Transporter selected the *Arrive* button for the manifest.

16

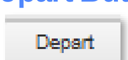
Edit Button



Press this field to display the *Edit Transporter Info* page allowing the Transporter to edit estimated departure and arrival times, as well as the assigned driver and vehicle information on the manifest. Once the *Arrive* button has been selected on the *Transfers Hub*, the *Edit* button is no longer available.

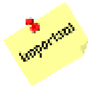
17

Depart Button



This button enables the Transporter to record the actual departure date/time from the Originating facility. When the *Depart* button is selected, a prompt displays for the user to confirm the action, as shown in Exhibit 97.

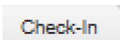
Exhibit 97: The Departure Confirmation Message



When there are multiple Transporters used for the transfer, the *Depart* button should only be used by the Transporter that actually picks up the shipment at the *Origin* facility. The *Depart* button is not intended to be used to report the time the transfer was handed off from another Transporter or for any other purpose. When the *Depart* button is clicked, the current date/time is recorded on the manifest as the departure date/time from the *Origin* facility.

18

Check-In Button



This button enables the Transporter to record the actual arrival date/time at the layover location. When the *Check-In* button is selected, a prompt displays for the user to confirm the action. The *Check-In* button displays only if a scheduled layover is recorded for the Transporter.

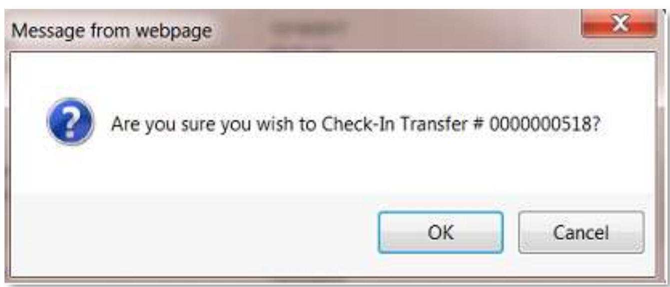
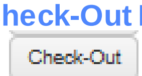


Exhibit 98: The Layover Check-In Confirmation Message

19

Check-Out Button



This button enables the Transporter to record the actual departure date/time from the layover location. When the *Check-Out* button is selected, a prompt displays for the user to confirm the action. The *Check-Out* button displays only if a scheduled layover is recorded for the Transporter.

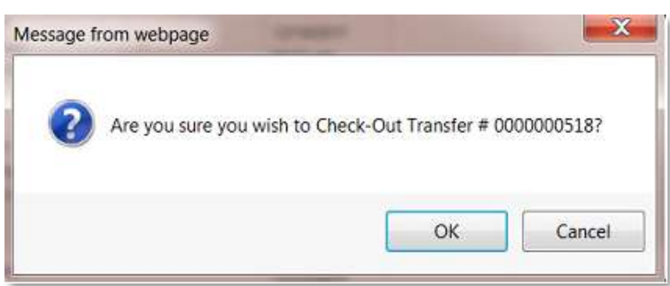


Exhibit 99: The Layover Check-Out Confirmation Message

20

Arrive Button

This button enables the Transporter to record the actual arrival date/time at the *Destination* facility. When the *Arrive* button is selected, a prompt displays for the user to confirm the action, as shown in Exhibit 100.

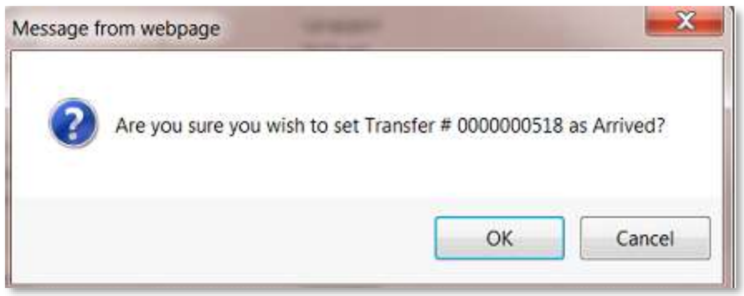


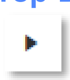
Exhibit 100: The Arrival Confirmation Message

Important

<u>When there are multiple Transporters used for the transfer, the *Arrive* button should only be used by the Transporter that actually delivers the product to the *Destination* facility</u>. The *Arrive* button is not intended to be used to report the time the transfer was handed off to another Transporter or for any other purpose. When the *Arrive* button is clicked, the current date/time is recorded on the manifest as the arrival date/time at the *Destination* facility.

21

Drop-Down Menu Arrow



This arrow indicates that the file has additional detail available for viewing. Selecting this arrow displays information on the packages included on the manifest for that particular transfer.

7.4.1 Editing Transporter Information

Select the *Edit* button associated to the transfer to be updated on the *Transfers Hub* page to access the *Edit Transporter Info* page.

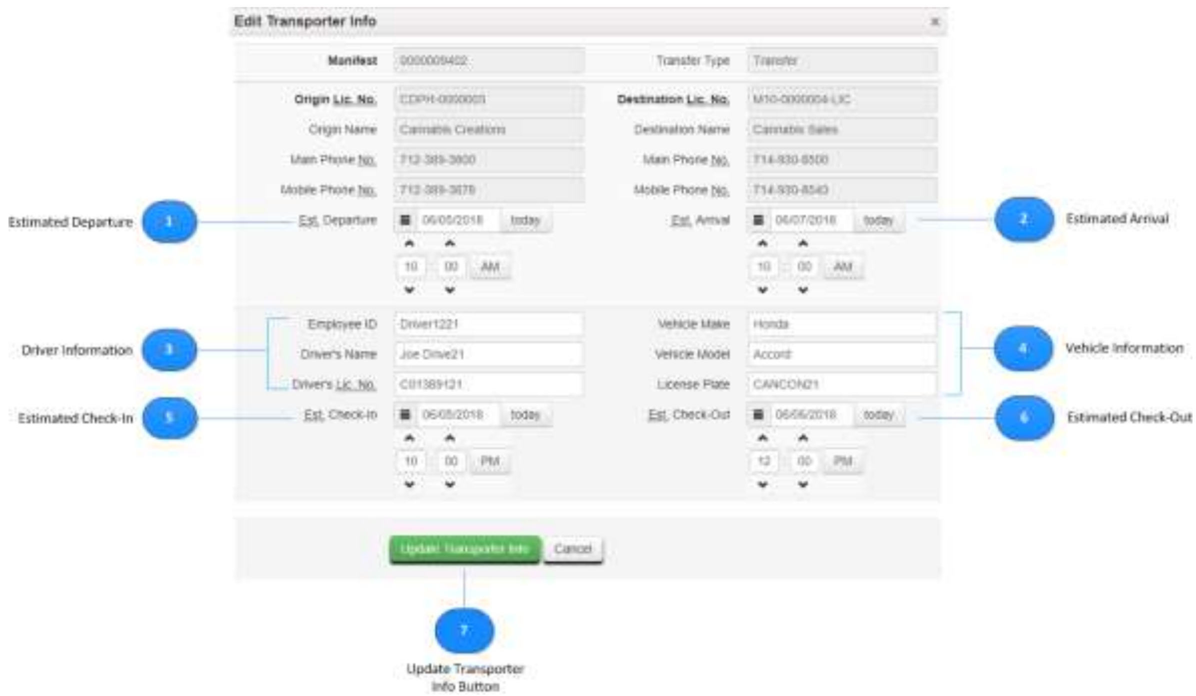
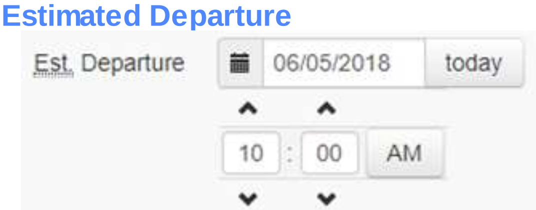


Exhibit 101: The Edit Transporter Info Page

Only fields related to the transporter are editable on the *Edit Transporter Info* page. These editable fields are described below.

1

Estimated Departure



Use the *Estimated Departure field* to update the estimated date/time for the departure from the *Origin* facility. Data can be manually entered or created using the calendar date/time functions. Once the *Depart* button has been selected on the *Transfers Hub*, the *Est. Departure* cannot be updated.

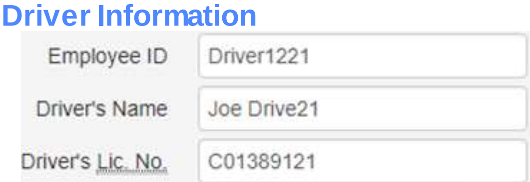
2

Estimated Arrival

Use the *Estimated Arrival field* to update the expected date/time for the arrival of the shipment at the *Destination* facility. Data can be manually entered or created using the calendar date/time functions. Once the *Arrive* button has been selected on the *Transfers Hub*, the transporter information on the manifest is no longer editable.

3

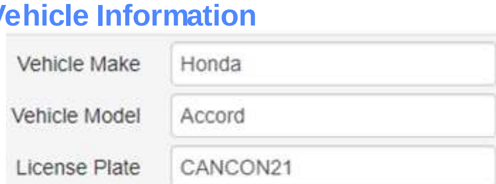
Driver Information



Use the Driver Information section to update the *Employee ID, Driver's Name* and *Driver's License Number*. The *Employee ID* is a required field that can be used at the licensee's discretion to record an employee internal business ID number or other distinguishing employee identifier.

4

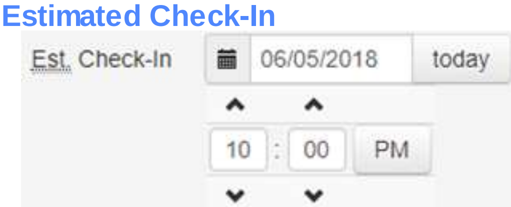
Vehicle Information



Use the *Vehicle Information* section to update the *Vehicle Make, Vehicle Model,* and *License Plate.*

5

Estimated Check-In



Use the *Estimated Check-In* field to update the estimated arrival date/time at the layover location, if applicable. Data can be manually entered or created using the calendar/time functions. Once the *Check-In* button has been selected on the *Transfers Hub*, the *Estimated Check-In* cannot be updated.

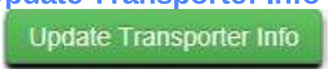
6

Estimated Check-Out

Use the *Estimated Check-Out field* to update the estimated departure date/time at the layover location, if applicable. Data can be manually entered or created using the calendar/time functions. Once the *Check-Out* button has been selected on the *Transfers Hub*, the *Estimated Check-Out* cannot be updated.

7

Update Transporter Info Button



Select this button to update the transporter information on the manifest.

8 Sales

Sales are reported by the industry to record the transfer of cannabis products to a consumer, patient or caregiver.

8.1 Entering Sales

Sales information is only captured after a Retailer License number has been selected. Recording sales is required for reporting the last event in the chain of custody.

Sales may be entered in two ways:

- Manually
- Data Import (via CSV file upload or API from a Third-Party Vendor that has completed the certification process with Metrc and the State)

Sales may also be entered from a POS system and must be entered within 24 hours of occurrence. In addition, physical inventory must be reconciled with Metrc at least once every 14 days.

8.1.1 Sales Receipts

From the *Sales* menu in the top navigation bar select the *Receipts* option to access the *Sales Receipt* page as shown in Exhibit 102. Select the button applicable to the action to be taken. Each button is described below.

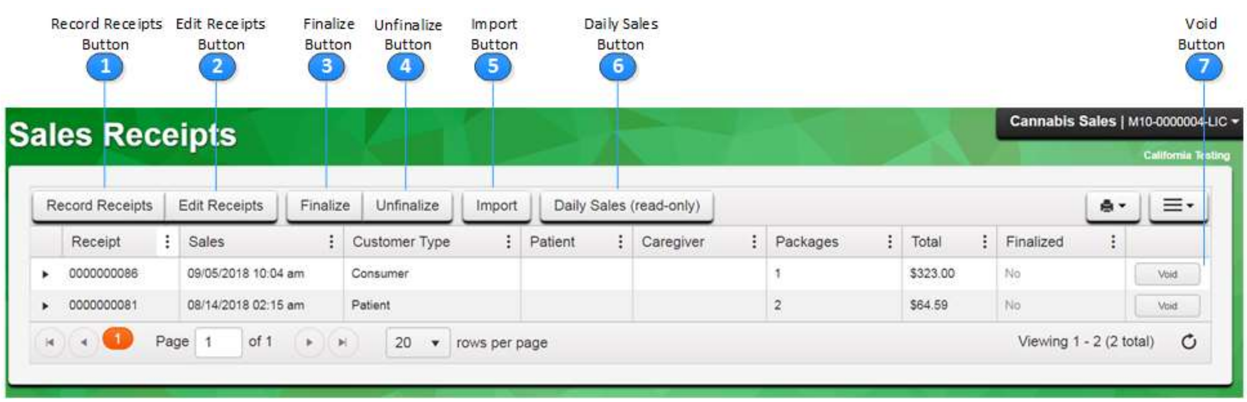


Exhibit 102: The Sales Receipts Page Buttons

Record Receipts Button

Select this button to launch the *Record Receipts* page for manual sales receipt entry.

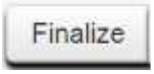
2

Edit Receipts Button

Select this button to launch the *Edit Receipts* page to edit manual sales receipts.

3

Finalize Button



To improve response time when looking up receipts on the *Edit Receipts* page, mark receipts as *finalized* by highlighting a receipt or multiple receipts and then selecting the *Finalize* button. A *finalized* receipt is grayed out on the *Sales Receipt* list page and cannot be selected for editing.

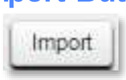
4

Unfinalize Button

Use the *Unfinalize* button if it becomes necessary to edit a receipt that was previously indicated as *finalized*. Highlight the receipt(s) to be marked as *unfinalized* and select the *Unfinalize* button.

5

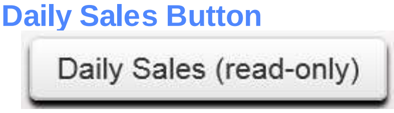
Import Button



Select the *Import* button to launch the *Data Import* page to upload a Point of Sale (POS) comma separated values (CSV) file into Metrc.

6

Daily Sales Button



Select this button to launch the *Daily Sales* page to view daily sales transactions. This page will not be populated with any data, as California does not use this method of recording sales.

7

Void Button

Select this button to remove a sales receipt.

8.1.2 Manually Entering Sales

Sales must be entered daily for each individual sales transaction. The following information is required in order to enter sales manually:

1. The date and time each sale took place.
2. The type of customer that made the purchase.
3. The Metrc *Package ID* for each package involved in the sale.
4. The quantity sold from each Metrc package.
5. The *Unit of Measure* in Metrc for each package.
6. The total dollar amount sold from each package before tax and after any discount was given.

Once the required information is available, enter sales on the *Record Receipts* page described in Section 8.1.2.1 below using the following steps:

1. Select the date and time the sale occurred.
2. Select the type of customer: *Consumer* (adult-use), *Patient*, or *Caregiver*.
3. Enter the *Package ID* by either typing in the last three (3) numbers of the package, or use the magnifying glass icon to find the package.
4. Enter the *Quantity sold*.
5. Enter the *Unit of Measure* in Metrc.
6. Enter the *Total Price* sold for that package before tax and after any discount was given.
7. Press the blue *Add* + (packages) button to add packages to the *Sales Receipt* as necessary and repeat steps 3 through 6.
8. Press the *Add* + (sales receipts) button and repeat steps 1 through 7 as necessary to add multiple *Sales Receipts* simultaneously.
9. Select the green *Record Sales Receipt* button at the bottom of the page to record all the sales.

Sales Receipts are editable (including the ability to update date/time, type of customer, quantity, price, and package details) using the *Edit Receipts* button on the *Sales Receipts* page and removable using the *Void* button on the *Sales Receipts* page.

8.1.2.1 Record Receipts

To access the *Record Receipts* page, select the *Record Receipts* button on the *Sales Receipts* page shown in Exhibit 102 above.

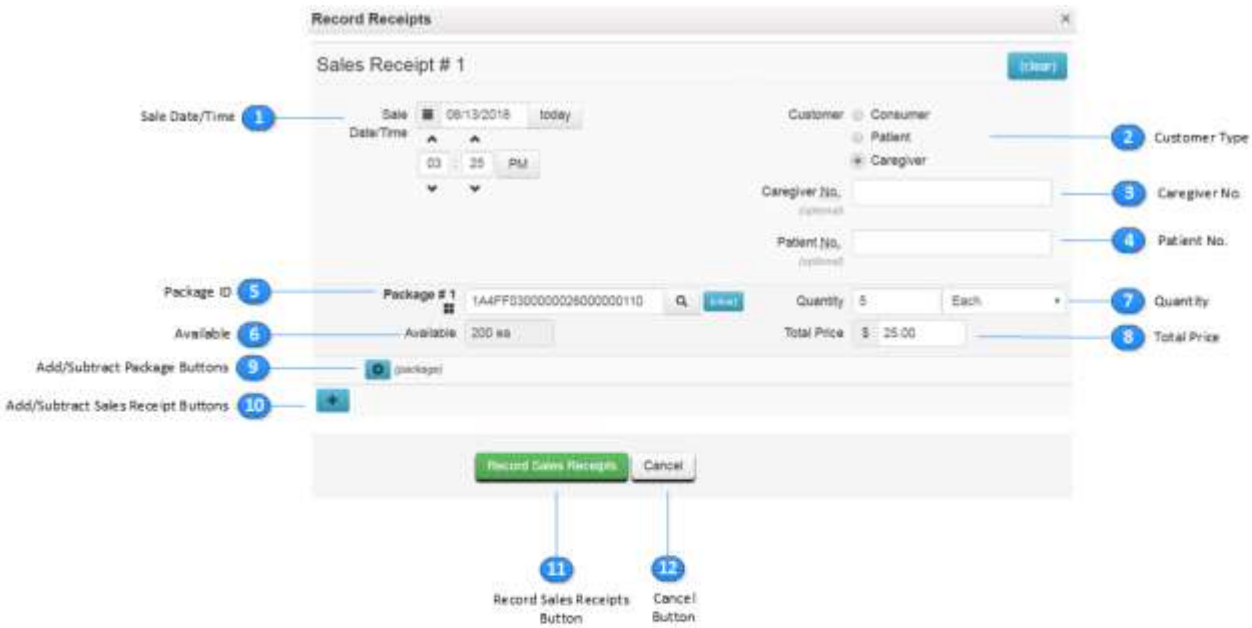
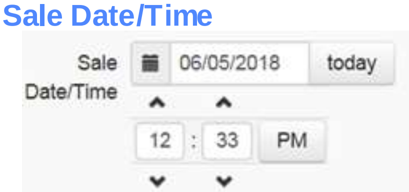


Exhibit 103: The Record Receipts Page

1

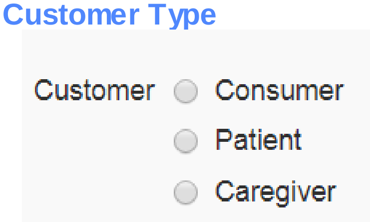
Sale Date/Time



Use *Sale Date/Time* fields to enter the date/time for the sale took place. Data can be manually entered or selected using the calendar date/time functions.

2

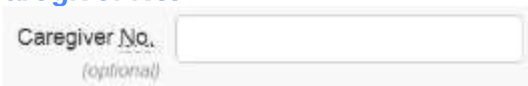
Customer Type



Use this field to specify the type of customer involved in the sale: *Consumer (adult-use)*, *Patient* or *Caregiver*.

3

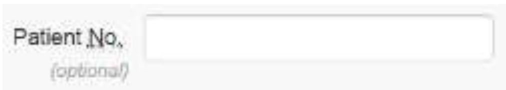
Caregiver No.



This field is enabled when a *Customer Type* of *Caregiver* is selected. California does not require that the *Caregiver* be tracked, so an entry in this field is not required.

4

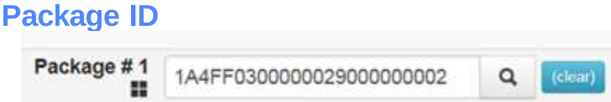
Patient No.



This field is enabled when a *Customer Type* of *Patient* or *Caregiver* is selected. California does not require that the *Patient* be tracked, so an entry in this field is not required.

5

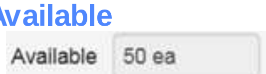
Package ID



Use this field to look-up the *Package ID* involved in the sale.

6

Available



This is a read-only field indicating the quantity in the package.

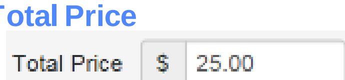
7

Quantity

Use this field to indicate the *Quantity* sold from the package.

8

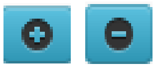
Total Price



Use this field to record the *Total Price* of the sale from the package before tax and after any discount was given.

9

Add/Subtract Package Buttons



Press the *Add* (plus) button to add additional packages to the *Sales Receipt* as required.
Press the *Subtract (minus)* button to remove the corresponding packages from the *Sales Receipt*. This button only displays when a subsequent package has been added.

10

Add/Subtract Sales Receipts Buttons

Press the *Add* (plus) button to record additional *Sales Receipts* simultaneously.
Press the *Subtract (minus)* button to remove the corresponding *Sales Receipts*.
This button only displays when a subsequent *Sales Receipt* has been added.

11

Record Sales Receipts Button

Select this button to save the *Sales Receipts*.

12

Cancel Button

Select this button to prevent the *Sales Receipts* from being recorded.

8.1.3 Importing CSV Files to Record Sales

Metrc package ID numbers must be associated with one or more SKU items in the user's Point of Sales (POS) system.

Use the POS system to export a CSV file to your computer. The file can then be imported manually into Metrc using the *Data Import* feature described in Section 9. Alternatively, the Third-Party system can automatically upload the file using Metrc's secure API (see the *API Third Party Vendor* list to see which firms can interface with Metrc on the Metrc website).

8.1.3.1 Sales (New)

Use the information below when building a Sales (new) CSV file for upload to Metrc.

<u>Fields</u>:
<Sales Date/Time>,<Customer Type>,<Patient Number>,<Caregiver Number>,<Package Tag ID>,<Quantity>,<Unit of Measure>,<Total Price>

<u>Example</u>:
2018-01-23 12:30,Patient,,,ABCDEF012345670000011229,5,Grams,20.52

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in your file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Sales Date/Time	*YYYY-MM-DD HH:MM*	*Yes*	*ISO 8601 Date*
Customer Type	*Alphanumeric*	*Yes*	*Valid Values: Consumer , Patient or Caregiver*
Patient Number	*Alphanumeric*	*No*	*Numeric value.* *Not required in California.*
Caregiver Number	*Alphanumeric*	*No*	*Numeric value.* *Not required in California.*
Package Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Package involved in the sale*
Quantity	*Alphanumeric*	*Yes*	*Amount sold from the package*
Unit of Measure	*Numeric*	*Yes*	*Unit of measure for package in Metrc.* *Valid values are: Each, Fluid Ounces, Gallons, Grams, Kilograms, Liters, Milliliters, Ounces, Pints, Pounds, Quarts*
Total Price	*Numeric*	*Yes*	*Alphanumeric (do not include $sign). Total amount before tax and after discounts*

Exhibit 104: Sales (New) CSV Record Layout

8.1.3.2 Sales (Update)

Use the information below when building a Sales (Update) CSV file for upload to Metrc.

Fields:

<Receipt Number>,<Sales Date/Time>,<Customer Type>,<Patient Number>,<Caregiver Number>,<Package Tag ID>,<Quantity>,<Unit of Measure>,<Total Price>

Example:

0000123456,2018-01-23 12:30,Patient,,,ABCDEF012345670000011229,5,Grams,20

Please note that the commas are just to designate the next column in the file. These commas should NOT be placed in your file if you are using a .csv file/excel spreadsheet. If you are using a .txt file, however, the commas are NEEDED.

Field	Format	Required	Description
Receipt Number	*Numeric*	*Yes*	*Numeric*
Sales Date/Time	*YYYY-MM-DD HH:MM*	*Yes*	*ISO 8601 Date*
Customer Type	*Alphanumeric*	*Yes*	*Valid Values: Consumer , Patient or Caregiver*
Patient Number	*Alphanumeric*	*No*	*Numeric value.* *Not required in California.*
Caregiver Number	*Alphanumeric*	*No*	*Numeric value.* *Not required in California.*
Package Tag ID	*Alphanumeric (24)*	*Yes*	*Tag ID of Package involved in the sale*
Quantity	*Alphanumeric*	*Yes*	*Amount sold from the package*
Unit of Measure	*Numeric*	*Yes*	*Unit of measure for package in Metrc.* *Valid values are: Each, Fluid Ounces, Gallons, Grams, Kilograms, Liters, Milliliters, Ounces, Pints, Pounds, Quarts*
Total Price	*Numeric*	*Yes*	*Alphanumeric (do not include $sign).* *Total amount before tax and after discounts*

Exhibit 105: Sales (Update) CSV Record Layout

9 Data Import

The *Data Import* page is accessed using the  upload icon on the top navigation bar or from the *Sales Receipt* page by selecting the *Import* button. The functions that are offered for upload are listed below:

1. Create Plantings / Plantings from Plants / Plantings from Packages
2. Immature Plants Growth Phase
3. Record Immature Plants Waste
4. Immature Plants Packages
5. Destroy Immature Plants
6. Plants Room
7. Plants Growth Phase
8. Record Plants Waste
9. Manicure Plants
10. Harvest Plants
11. Destroy Plants
12. Packages from Harvest
13. Lab Results
14. Package Adjustment
15. Sales (new)
16. Sales (update)

If uploading multiple types of CSV files, it is recommended that they be uploaded in the order listed above to avoid data collisions. For instance, if uploading a CSV to Manicure Plants and another to Destroy Plants and the same plant is included on both files, the manicure must be recorded prior to the destruction of the plant.

Exhibit 106 shows the features of the *Data Import* page.

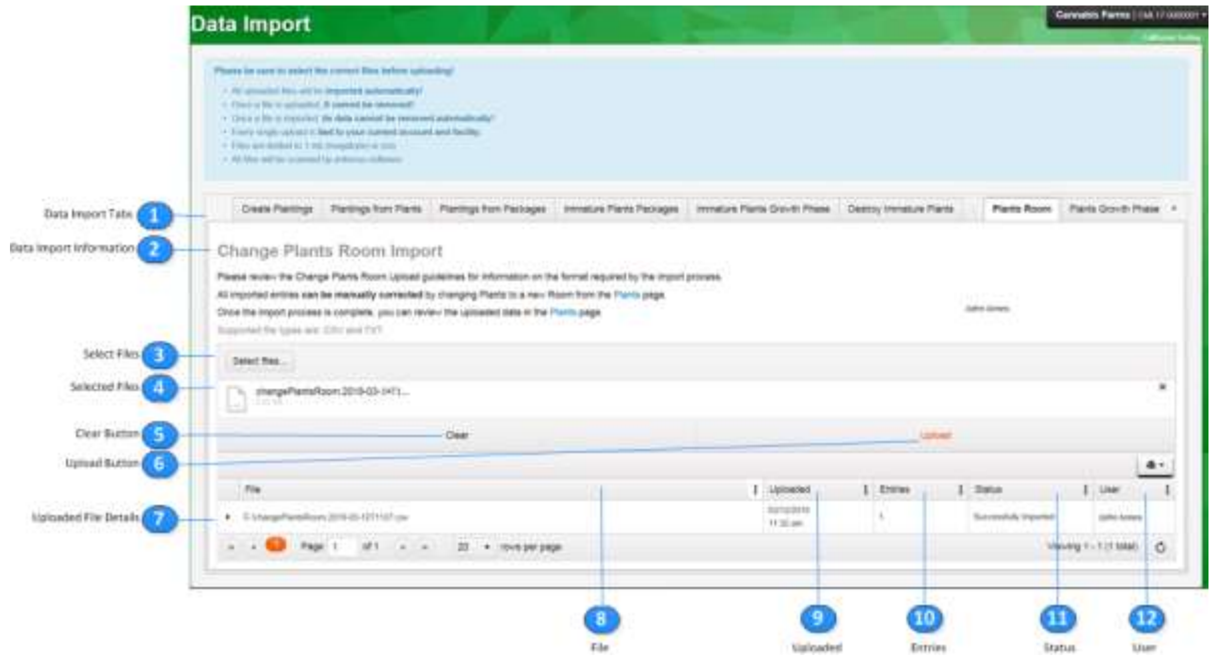


Exhibit 106: The Data Import Page

1 Data Import Tabs

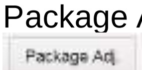
There is a separate tab for each type of CSV file. The tabs that display are specific to a facility's/employee's permissions to perform that type of action in Metrc.

Immature Plants Actions:

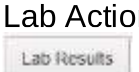
Flowering Plant Actions:

Harvest Actions:

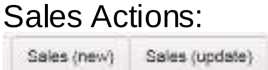
Package Actions:



Lab Actions:



Sales Actions:



2

Data Import Information

Package Adjustments Import

Please review the Package Adjustments Upload guidelines for information on the format required by the import process.

All imported entries **can be manually corrected** by applying new Package Adjustments from the Packages page.

Once the import process is complete, you can review the uploaded data in the Packages page.

Supported file types are: CSV and TXT

The *Data Import Information* section provides helpful information related to the type of CSV file being uploaded.

3

Select Files

Select files...

The *Select Files* button allows the user to browse their computer/network to specify the CSV file to be uploaded. Files can also be dropped into this area for upload. Multiple files can be uploaded at one time.

4

Selected Files

This is a list of CSV files which have selected for upload.

5

Clear Button

Clear

The *Clear* button is enabled only when CSV files have been selected for upload. Clicking the *Clear* button removes all the files listed in the *Selected Files* section.

6

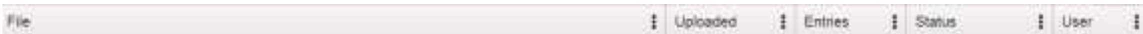
Upload Button

Upload

The *Upload* button is enabled only when CSV files have been selected for upload. Clicking the *Upload* button initiates the process to upload all the files listed in the *Selected Files* section.

7

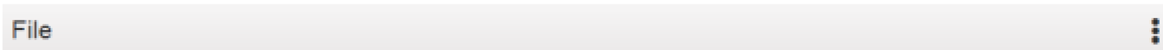
Uploaded File Details



The *Uploaded File Details* section lists the CSV files that have been uploaded for the facility on that specific tab. See below for a description of each field.

8

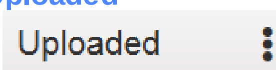
File



The *File* field provides the name and location of the file that was uploaded.

9

Uploaded



The *Uploaded* field provides the date and time the file that was uploaded.

10

Entries

The *Entries* field lists the number of records on the uploaded file.

11

Status

The *Status* field provides the outcome of the upload. If successful, the status will be *Successfully Imported*. If an error occurs during processing, the status will display as *Error - Not Imported*. Clicking the  next the record will provide details of the error(s).

The *Row* the error occurred on and a *Message* describing the error are provided for trouble-shooting purposes. When an error occurs, none of the records on the CSV file are processed.

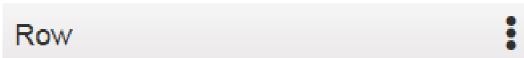
12

User

The *User* field lists the name of the employee that uploaded the file.

13

Row



The *Row* field lists the row in the CSV file that contained the error.

14

Message

The *Message* field describes the error encountered on the specified row in the CSV file.

9.1.1 CSV File Best Practices

Each row of the CSV file contains information about one *Plant* or *Harvest* action. While the abbreviation "CSV" refers to any data file delimited with commas, different tools implement the CSV format differently.

It is recommended that the rules used by Excel be utilized when generating CSV files for upload to Metrc:

- No quotation marks (') or double quotes (") appear around string values in most situations. Two exceptions to this rule follow:
  - If a string value from the extract contains a comma, the entire string is surrounded by double quotes. For instance, if an Item is defined as:

    `Star Trek, The Next Generation`
    it will be represented in the CSV file as:
    `"Star Trek, The Next Generation"`
  - If a string value from the extract contains double quotes, use double quotes around the string and also as an escape character. For instance, if an Item is defined as:

    `Brownies "R" Us`
    it will be represented in the CSV file as:
    `"Brownies ""R"" Us"`
- Empty fields are represented in the CSV file as the absence of text between delimiting commas – in other words, two consecutive commas appear in the file. This should only happen for the fields indicated as Optional in the record layouts.
- The CSV file should not include a header row.