

Welcome to Metrc!

Features, tools, and what to expect transitioning to the new seed-to-sale system

The rollout of **Metrc**, the state selected seed-to-sale system, has officially begun. Now that a more concrete timeline for this process has been released, we've compiled this guide to serve as a resource hub for the Metrc training process, Flowhub features, and workflow changes you can expect moving forward.

Flowhub was the original Metrc integrator and we've been servicing Metrc markets since 2016. Our ecosystem and inventory management features are designed with Metrc in mind. Below you'll find a comprehensive breakdown of the different Metrc features and tools we offer as well as a brief summary of the steps needed to get on board with Metrc.

Metrc Onboarding

The OMMA, in conjunction with Metrc, have compiled a step by step guide on how to start transitioning to the new platform. Here is a brief description:

1. Submit your application for the annual/provisional license.
2. Register and complete the New Business System training with your dedicated Metrc account manager
3. Request plant/package UID tags
4. Document physical receipt of requested UID tags
5. Assign and apply the UID tags to your cannabis products

For more detail on these steps, click [here](#).

Brief Overview

Metrc handles the full **seed-to-sale** spectrum of the cannabis industry. This includes cultivation, manufacturing, distribution, and retail. Because Flowhub is your *retail* POS provider, we are at the end of the supply chain, so to speak.

This can mean a few different things. For one, the initial setup of your Metrc inventory will be handled outside of Flowhub. We'll then provide you with features to *pull* the inventory and package data from your Metrc account and import it into Flowhub. In addition, the only data we currently *push* to Metrc is your daily sales receipts report.

Ultimately, the state selected Metrc to oversee all operations in Oklahoma. This means your Metrc account is the source of truth to the state and you'll want to utilize our features and tools to ensure your Metrc inventory data remains accurate.

Flowhub Metrc Features

Once you complete the above steps and your Metrc inventory is ready, you can start utilizing Flowhub's Metrc features. There are several areas of Flowhub that utilize an API connection to Metrc to ensure a clean transmission of data. Here is a brief overview of the features we offer. For a more in depth description of each feature, please click the respective links:

1. **Import Packages** - Using the API, Flowhub syncs with your Metrc account across all licenses, allowing you to import active packages to your Flowhub inventory. Using your Product catalog in Flowhub, this feature greatly cuts down on the amount of manual data entry required to enter inventory. Click [here](#) for a more detailed overview on this feature.
2. **Daily Sales Upload** - Flowhub uploads your daily sales to Metrc with the push of a button. You can also download the daily sales CSV and make adjustments and correct discrepancies before manually uploading to Metrc. We allow this flexibility to ensure discrepancies are minimized and your inventory data remains clean. Please see more information below on your closing steps workflow.
3. **Metrc Discrepancy Report** - Managing your inventory and decreasing Metrc discrepancies can be challenging. We therefore offer a comprehensive report that compares your Flowhub inventory to your Metrc inventory. There are a variety of reasons that cause discrepancies, this report is a powerful tool to help proactively mitigate inventory issues. To find out more on the specifics of this report, click [here](#).
4. **Employees** - Users in Flowhub can assign a unique API to their profile. API keys are created in Metrc and correspond with the user's Metrc permissions. This is what allows Flowhub users to access the different API related features such as the Discrepancy Report and uploading daily sales. For more information on how to set up API keys, click [here](#).

Flowhub UI and Workflow Changes

Inventory:

In addition, you'll notice other areas of Flowhub that correspond to Metrc's workflow.

On the **Add Inventory** screen, you'll see the Metrc **Package Tag** field which corresponds to the 24 digit UID number.

Starting **4/30, this will be a required field in Inventory when adding new products.

If you have an API key attached to your employee profile, you'll see the option for **Verify Tag**. After you enter the package tag, you can select the Verify Tag option to confirm it's a valid package in your Metrc account and pull in any additional batch related information not currently entered. This is a quick and helpful way to ensure the manually entered package tag matches the one from your Metrc account.

The screenshot shows the 'Add New Inventory Item' form with the following fields:

- Category:** category: Concentrate ▾
- *Package Tag #:** scan or enter package # [Verify Tag]
- *Batch #:** enter batch #
- Batch Date:** mm/dd/yyyy
- *Supplier License:** select the supplier license
- *Product Name:** select the product
- Invoice #:** enter invoice #
- *Reporting Unit of Meas.:** Each (per unit sold)
- Cost/Unit:** cost/unit
- *Price:** price
- Post-Tax:** --
- *Expiration Date:** mm/dd/yyyy

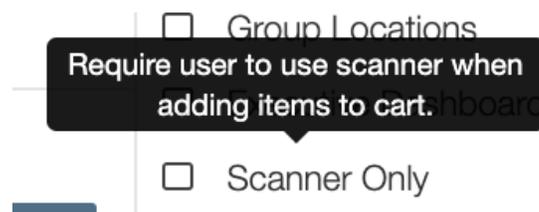
Since the RFID package tag is required to enter for each product, we'll update your inventory UI to ensure this is entered for each inventory item entered in Flowhub. When sales are uploaded to Metrc each day, the package tag is how Metrc associates the quantities sold to the specific inventory items.

The package tags provided by Metrc are NOT the same as the product SKUs, which are unique identifiers specific to the product, rather than the batch. For example, you can have multiple batches of the same product that share the same package tag but for each product in those batches, there will be a specific SKU for each item. Therefore, once the physical packages are received at your dispensary, we'd recommend utilizing the **Print Barcode** feature to use the SKU as the barcode. When you go to scan items into a cart, the SKU will ensure the product with the correct package tag is being added. If you're already using this label to print the SKU/Barcode, you won't see many differences to your inventory management workflow.

Quick Tips:

When receiving new Metrc transfers, you may not want to put *all* items into a for sale room. This can be done depending on your current for sale inventory and if you have the remaining batch of items in storage. In Flowhub, you can designate different Rooms as to whether they are *for sale* or *not for sale*. For more information on how to utilize our **Rooms** feature, click [here](#).

In addition, you can provide further safeguards by enabling the **Scanner Only** permission on Employee Profiles. This permission restricts budtenders from adding inventory to a cart unless it is physically scanned using the SKU barcode. This is a great practice for high volume stores carrying a variety of products to ensure the correct items are added when checking out.



Closing Steps:

There will be one additional step at the end of the day: uploading your sales to Metrc. Each sale is recorded in our **Metrc Receipts** report and you're able to send the full days worth of transactions to Metrc with the press of a button.

Using the Metrc API, a user with a valid API key and permissions to access Flowhub reports can follow these steps to upload sales to Metrc:

1. Click **Reports**
2. Search for the **METRC RECEIPTS** report

receipts ✕	Location: Choose One ▾	08/28/2019	med	rec	+
NAME ▲	TYPE	DESCRIPTION			
METRC RECEIPTS	METRC RECEIPTS	Sales receipts data for reporting to METRC			

3. Click the report and choose the **Date** and **License Type** (if applicable)
4. If you're a multi-location operator and you have the **Report Admin** permission, you can select which location to upload sales for
5. Choose the desired option:
 - a. **Upload to Metrc** - this is the recommended option as it provides a 'one-click' solution for sending sales through the API directly to your Metrc account
 - b. **CSV** - in the event of the API failing due to an incorrectly entered package tag or Unit of Measure (UOM), you can download the CSV and make adjustments to these values before submitting to Metrc. This allows you to minimize Metrc discrepancies by catching them before the data is uploaded

Sales will be uploaded to Metrc on a daily basis. Metrc does allow for up to a 24 hour grace period for missed days to ensure sales are entered in a timely manner. Once sales are uploaded to Metrc, you'll also need to **Finalize** the individual receipts. You can learn more about this step from your dedicated Account Manager at Metrc.

Epilogue

We understand this is a stressful time and massive undertaking by the state. To reiterate, Flowhub has been working with Metrc since our inception and we currently operate in 8 Metrc states: Colorado, Montana, Alaska, Oregon, Michigan, Maryland, Massachusetts, and Nevada. We are confident in providing a robust retail solution for your Metrc needs and will be ready to assist you.

It's time to dive into the world of Metrc! We're very excited to join you on this new journey.

Helpful Links and Resources

[Oklahoma | metrc](#)

[Metrc Next Step Overview](#)