



METRC RECEIVING

A practical guide to syncing, reviewing, and receiving cannabis packages into
PLNTRK inventory



CUSTOMER GUIDE

For store managers, inventory staff, and receiving teams

The one rule to remember

Syncing a package does not make it sellable. A store user must review the package and connect it to the correct PLNTRK product before it becomes inventory.

STEP 1

Check the METRC connection

Before syncing, make sure PLNTRK has everything required to communicate with METRC.

Field	What it tells you
Integration	METRC is enabled for this store.
Vendor key	PLNTRK's METRC vendor credential is configured.
Store key	The store's METRC API key is configured.
License	The METRC license number PLNTRK will use.

If anything shows Missing

Stop and review the store's METRC settings. All required connection items must be configured before a package sync can succeed.

Modified start and Modified end tell PLNTRK which METRC records to check. The dates refer to when a package record was changed in METRC, not necessarily when the physical package arrived at your store.

- Setting up METRC receiving for the first time.
- Looking for an older package.
- A package did not appear during a previous sync.

Use a shorter recent date range. This is usually faster and produces a smaller, easier-to-review inbox.

1. Select the Modified start and Modified end dates.
2. Select Sync packages.
3. Wait for the progress message to finish.
4. Review the updated package counts and open the Pending tab.

STEP 2

Read the package card

Use the details on each card to confirm that you are working with the correct METRC package.

✓ METRC item name	✓ METRC package label
✓ Quantity and unit of measure	✓ Category
✓ Brand or strain	✓ Source facility and license
✓ Lab testing status	✓ Received date
✓ Packaged date	✓ Expiration or use-by date
✓ Production batch number	

Tab	What it means	What to do
Pending	Waiting for review	Choose an existing product or create a new one.
Needs attention	Something requires a decision	Read the warning shown on the package before receiving it.
Imported	Already added to PLNTRK	Use this tab to confirm the linked product, variant, and inventory batch.
Deferred	Set aside for later	The package stays in METRC and can be returned to the receiving queue.
Inactive	Inactive in METRC	Keep for reference; generally do not receive as new sellable inventory.

STEP 3

Choose bulk or retail units

The package type determines whether inventory is attached to a product or to a specific sellable variant.

Is this package bulk material or individual retail units?	
BULK PACKAGE	RETAIL UNITS
Select the existing PLNTRK product.	Select the existing PLNTRK product.
Leave Variant at “Bulk package - product level.”	Select the exact matching variant, such as 3.5 g.
Receive into the selected product.	Receive into the selected product and variant.

A bulk package contains material managed at the product level, such as bulk flower. Select the correct product, leave the variant field at Bulk package - product level, and receive the package. A separate retail variant is not required at this stage.

A retail-unit package contains individual sellable items. Select both the product and the exact variant. For example, a package containing 3.5 g units should normally be matched to the product’s 3.5 g variant.

Important

The variant list is filtered by the selected product. This helps prevent a package from being connected to a variant belonging to a different product.

Avoid this mistake

Do not attach a retail package to a “close enough” size. The selected variant should represent the actual item and unit shown in METRC.

STEP 4

Receive into an existing product

Use this path when the matching product is already set up in PLNTRK.

5. Open the package under Pending.
 6. Select the correct Existing product.
 7. Select the exact matching Variant.
 8. Select Receive into selected product.
 9. Open Imported and confirm the linked product, variant, and inventory batch.
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10. Select the correct Existing product.
 11. Leave Variant at Bulk package - product level.
 12. Select Receive into selected product.
 13. Open Imported and confirm the linked product and inventory batch.

Confirmation check

After import, the package card should show where the package was placed. Confirm this before moving on to the next package.

Select Create new product when the METRC item has no matching PLNTRK product. PLNTRK opens the product editor and carries available package information into the setup process.

- Product name and category
- Brand and strain
- Product description
- Product variants
- Purchase amount and unit
- Inventory enforcement
- METRC item information

Duplicate warning

Do not create a new product when a matching PLNTRK product already exists. Duplicate products can appear in POS searches, menus, inventory reports, and sales reporting.

SPECIAL CASES

Defer, holds, lab state, and search

These tools help you safely handle packages that are not ready for normal receiving.

Select Defer when you are not ready to receive a package. The package moves out of Pending and into Deferred. This does not delete or change the package in METRC.

- Waiting for product details
- Need manager review
- Possible duplicate
- Wrong facility
- Package received in error
- Product setup incomplete

To work with the package again, open Deferred and select Return to receiving queue.

Do not treat a held package as normal inventory

Review the package directly in METRC and determine why it is on hold before attempting to sell, transfer, adjust, or finish it.

The Lab state field displays the testing status supplied by METRC. Common values may include NotSubmitted, Submitted, TestingInProgress, TestPassed, and TestFailed. Follow your state requirements and store procedures before making inventory available for sale.

Search by item name, full package label, or source facility. Search applies only to the tab you are currently viewing. For example, searching while Imported is selected searches imported packages rather than the entire inbox.

TROUBLESHOOTING

Use Sync history first

Sync history shows what PLNTRK requested from METRC and whether the requests succeeded.

- Date and time the sync started
- Overall sync status
- Number of METRC requests
- Successful requests
- Failed requests

Select Open to view details. The page keeps up to the latest 25 sync runs.

1. Check connection status

Confirm Integration, Vendor key, Store key, and License are configured.

**2. Widen the date range**

The package may have been modified earlier than expected.

**3. Sync again**

Pull the latest active and inactive package records.

**4. Check every relevant tab**

Look under Pending, Needs attention, Imported, Deferred, and Inactive.

**5. Search the full label**

Use 070330600171 or the package's complete METRC label.

**6. Open Sync history**

Look for failed requests or a partial sync.

QUICK ANSWERS

Common situations

Use these answers before making a second import or creating another product.

The correct product is not listed

The product may not exist, may be inactive, or may need setup. Use Create new product only when there is truly no matching product.

The correct variant is missing

Confirm the correct product is selected. If the needed size or variation does not exist, update the product before receiving the package.

A package was deferred by mistake

Open Deferred and select Return to receiving queue.

A package was linked to the wrong product

Do not receive the same package again. Ask a manager or system administrator to review and correct the inventory relationship.

The package shows Needs attention

Read the warning on the card. Resolve the missing information or condition before receiving.

The package is inactive in METRC

Keep it for reference. Generally do not receive it as new sellable inventory.

FINAL CHECK

Receiving checklist

Use this short checklist each time you process a METRC package.

- ☐ METRC connection items show configured or enabled.
- ☐ The sync date range includes the package's likely modified date.
- ☐ The package label matches the physical or expected package.
- ☐ The quantity and unit of measure make sense.
- ☐ The source facility and lab state were reviewed.
- ☐ Bulk versus retail units was identified correctly.
- ☐ An existing product was used when a match already existed.
- ☐ Retail units were matched to the exact variant.
- ☐ Packages on hold or needing attention were investigated.
- ☐ The package appears under Imported with the correct product and inventory batch.

Remember

Sync first, review carefully, receive once, and confirm the result under Imported.



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