New York Metrc Beginning Inventory – Part 1

Metrc recently released a Beginning Inventory Guideline for New York, which steps through the process of preparing inventory for sales in Metrc. Below are some tips on where to get started.

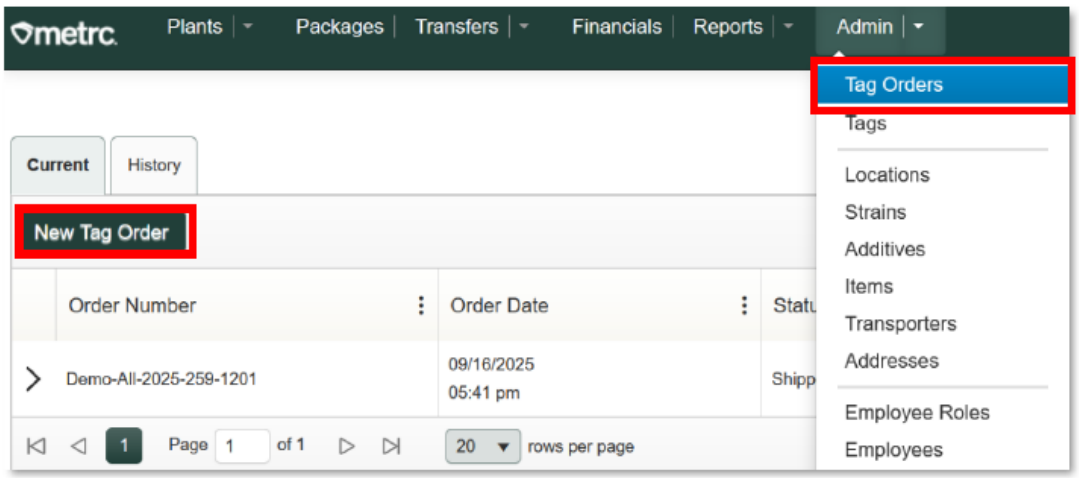
Actions Required for Initial Setup & Configuration

Step 1: Take the New Business Training Course in Metrc Learn

- This is required for Metrc Admin users to get credentials and access to the Metrc portal. Credentialing starts today Friday, **November 7th, 2025**.
- When you sign up, make sure to select you are the Metrc admin and enter your license number. Once you complete the learning course, it can take up to 72 business hours to get credentialed.

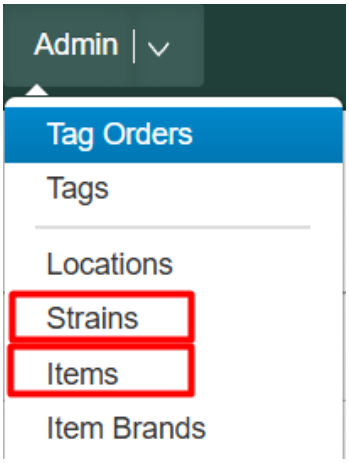
Step 2: Order Metrc Package Tags

- You will need to order enough Metrc tags through the Metrc portal to replace the package IDs of all your existing inventory. Everything needs to be tagged and received in the Metrc portal by Monday, **December 15th, 2025**.
- Tags are printed and shipped via UPS with a standard shipping time of 5-7 days, so please allow enough time for delivery.
- You can find **Tag Orders** under the **Admin** menu in Metrc.



Step 3: Validate that ALL products in your Cova Catalog have Required Fields for Cova to create Strains and Items (Products) in Metrc.

- For Cova to Create Strains and Items (products) for you in Metrc automatically, we need to ensure you have the required fields present and filled in.
    - Strain Type: Sativa, Indica, Hybrid
    - Strain: e.g “Bubba Kush”, “Ghost Train”, “Afghani Widow”
    - THC Content
    - THC %
- A representative from Cova should have already reached out to you about these fields in your catalog. If you have not heard from an implementation partner or your account manager, please email implementation@covasoftware.com
- The Item (Product) information needs to be added in Cova so that strains can be associated with Items and then packages upon creation.
- You can use Cova’s Catalog Export report to find this data and filter to just cannabis products.
- This step must be completed for Cova to be able to create your strains and Items (products). You can find both **Items** and **Strains** under the **Admin** menu in Metrc.



- Once your product information is up to date with the required fields, reach out to your representative at Cova to schedule the next steps.
- Strains and Items can be edited after Cova imports them should you need to make any changes.

New York Metrc Beginning Inventory - Part 2

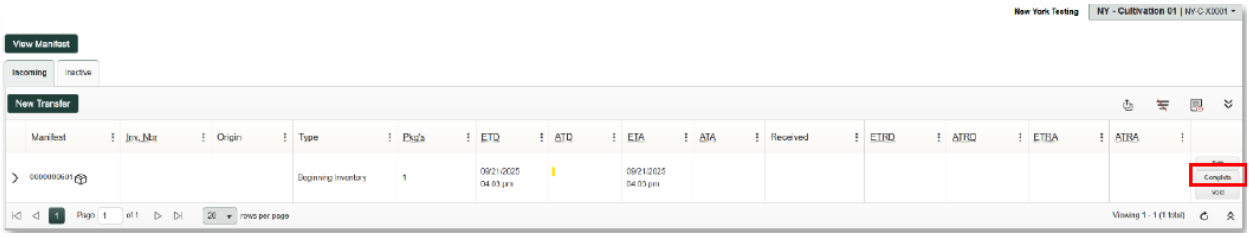
Once Cova has created your items (products) and strains in Metrc, we will build all your External Transfers so that you can start the process of receiving your current in-stock packages in Metrc and assigning package ID's.

Note: All inventory including items, strains, and packages need to be in Metrc by January 12th.

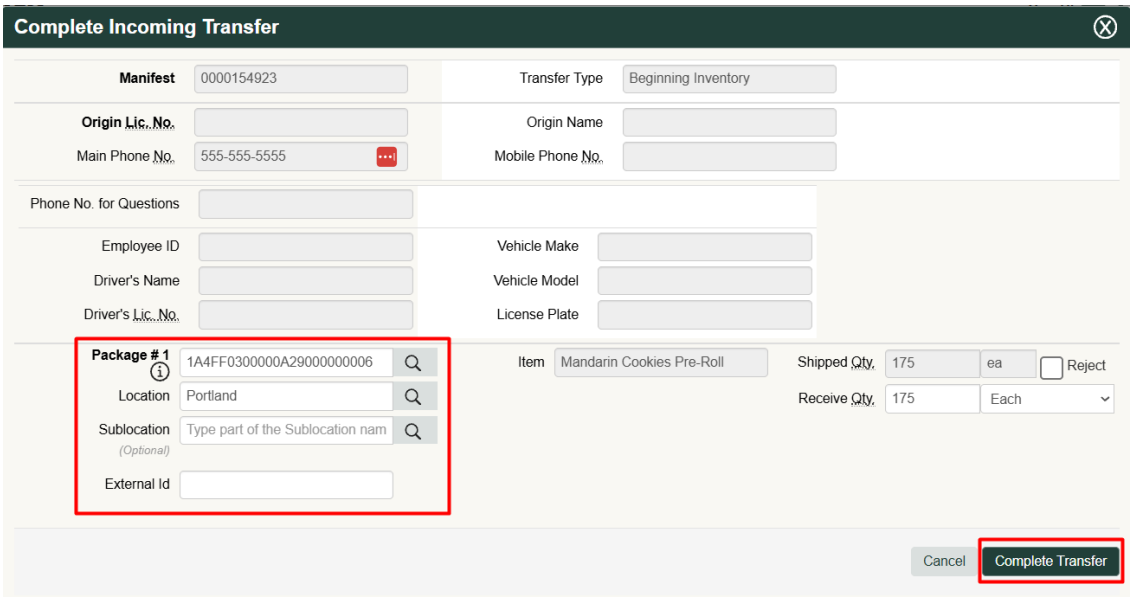
Action Required for Receiving Metrc Packages

Step 1: Complete (Receive) Transfers in Metrc

- In this process, you will receive the quantity for each product at your location(s) in Metrc. This will require matching Metrc Package IDs (physical package tags) you previously ordered in the Metrc portal to the physical products in your store. **Do not complete transfers unless you have physically received your package tags in the mail.**
- Under incoming transfers, click the **Complete** button.



- This will open the complete transfer window. It is **very important** that you match the package quantity with what you physically have and what is in Cova. If the quantity or ID's don't match, it will lead to failed sales reporting within Metrc. **Make sure to do this while the business is closed so active sales do not impact the quantities you are entering.**
    - You can select your new Metrc Package ID from the list available for your license. These will match the tags that you previously ordered and should be the package ID you are labeling the product with.
    - Make sure to choose the correct location where this package resides if you have more than one location.
    - Once this is complete, click **Complete Transfer**.



Step 2: Enter employee API Key(s) into Cova

- Your Admin Key will already be entered into Cova however, you will need to add your individual team members API keys and ensure they have the appropriate permissions by role – if they do not have the correct permissions and attempt to sell or process inventory, it can lead to errors landing on your traceability dashboard.
- Keys can be generated through the Metrc portal then entered in Cova's traceability settings. Before generating your key, ensure you have all necessary permissions enabled in Metrc, this includes: View and Manage Packages, View and Manage Sales
    - We also recommend using employee keys for better compliance and transparency of transactions. The NY OCM may require individual employee keys to be configured in order to remain compliant.
- Once you enter your keys, you should see the beginning external inventory transfers you received in Metrc during Step 1 ready to be received in Cova under the **Manifests** section.

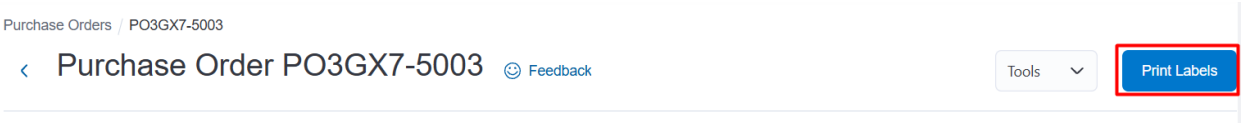
Step 3: Receive Packages in Cova Using Manifests

- In Hub, go to Manifests to start receiving the beginning external inventory transfers that you have received in Metrc. Initial inventory Manifests can be identified as the Manifests without a supplier name.
- **VERY IMPORTANT:** You will use the supplier **"Metrc Beginning Inventory"** that has already been added to your environment and associated to all products by Cova. This will ensure that OCM reporting remains compliant and you do not have to enter costs during receiving your Metrc package ID's, or receive by supplier.

- Here's our help docs on how to receive products through Manifests in Cova.
- Once these packages have all been received, you will have the same package ID's and quantities of product in both Cova and Metrc.

Step 4: Relabel Packages with Metrc Package IDs

- When a Manifest is received in Hub, it creates a completed purchase order. You can open the completed PO under **Inventory >> Purchase Orders** to bulk print labels for packages received on a manifest.



  - All packages should be relabeled with your new Metrc Package IDs to ensure sales get submitted to Metrc properly when the product is scanned at checkout. **You can tag a whole case and scan that case tag when a package is purchased from that case if you are using a backroom fullfillment model.**
  - Cova recommends using Scan to Confirm moving forward to verify the package ID and product going out the door match and are properly recorded between Metrc and Cova.

Step 5: Cova will Adjust Out ALL old package ID's Automatically

- Cova will adjust out the old package ID's in your hub once you have replaced them by receiving the products and package ID's through the external transfers in Metrc.
- Please confirm with your Cova Representative when you have received all External Transfers in Cova so that we can complete the required adjustments for you.
- You may have double inventory while we process your adjustments, please sell only Metrc Package ID's to avoid errors on your traceability dashboard.

Note: **Metrc will be shutting off the beginning inventory functionality at 12am midnight Eastern Time on January 12th, 2025. We recommend you do not accept products from suppliers that are not sent via Metrc Manifest with Package ID's after December 17th, 2025 or you will be out of compliance with the NY OCM.**

Need Help

Please reach out if you have any questions to **implementation@covasoftware.com**, **customercare@covasoftware.com**, or contact us at **1-844-667-2682**.