

Bulletin Number: ME_IB_0020	Distribution Date: 11/4/21	Effective Date: Ongoing
Contact Point: Metric® Support	Subject: Finalizing Sales Receipts	
Reason: Metric is providing emphasized guidance on the requirement to finalize sales receipts		

Greetings Metric Users,

Metric would like to advise on Finalizing Sales receipts. Receipts should be finalized up to the last week. Finalizing your receipts will speed up the sales receipts area and help with editing times for receipts. You may finalize multiple receipts at a time. This process will be demonstrated within this bulletin.

Please find on the following pages for additional details:

Sales Receipt Finalize and Unfinalize Buttons

The Sales Receipt section of Metrc includes two buttons: Finalize and Unfinalize. A new Finalized column (which is filterable) is available in the Sales Receipt grid as well. This column is shown in **Figure 1** below.



Figure 1: Finalized Sales Receipt Field

When a receipt is no longer active, select the receipt and click the Finalize button. The following window will appear. Verify the receipt number and click the “Finalize Sales Receipts” button. This step is shown below in **Figure 2**.

Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing. Larger stores may want to Finalize older Sales Receipts at a faster pace (e.g., weekly).

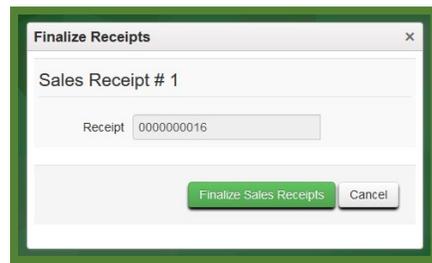


Figure 2: Finalize Sales Receipt Action Window

Finalizing sales receipts will remove the receipt from the list of active receipts Metrc pulls when you edit receipts, which will improve system performance. **Note: Only those receipts not marked as “finalized” will display in the edit receipts window.**

If a “finalized” receipt later needs to be edited, utilize the Unfinalize button on the Sales Receipts grid. Select the desired receipt and click the Unfinalize button. The following window will appear. Verify the receipt number and click the “Unfinalize Sales Receipts” button. The unfinalized action window is shown below in **Figure 3**.

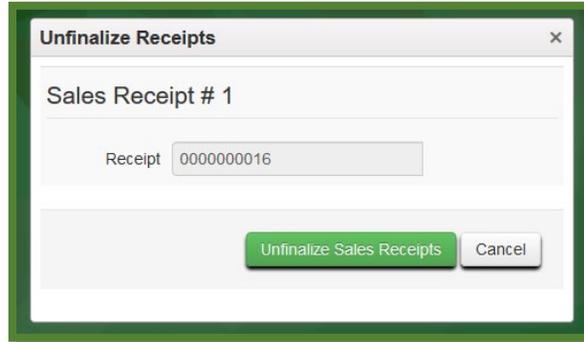


Figure 3: Unfinalize Sales Receipt Action Window

Finalizing Multiple Receipts

Multiple receipts can now be selected and finished at one time. To do this click and drag to select multiple receipts, then select the finalize button. This step is demonstrated in **Figure 4**, below.



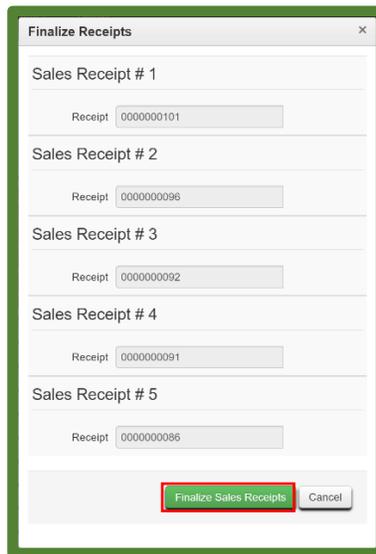
The image shows a screenshot of a software interface with a table of sales receipts. The "Finalize" button in the top toolbar is highlighted with a red box. The table has columns for Receipt, Sales, Customer Type, Patient, Packages, Total, Recorded, and Finalized. Each row has a "Void" button on the right.

Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized	
▶ 000000101	05/03/2019 01:09 pm	Consumer		1	\$10.00	05/03/2019 03:13 pm	No	Void
▶ 000000096	05/03/2019 09:21 am	Consumer		1	\$10.00	05/03/2019 11:25 am	No	Void
▶ 000000092	05/01/2019 01:55 pm	Consumer		1	\$10.00	05/01/2019 03:58 pm	No	Void
▶ 000000091	05/01/2019 01:49 pm	Consumer		1	\$20.00	05/01/2019 03:53 pm	No	Void
▶ 000000086	04/25/2019 12:40 pm	Consumer		1	\$10.00	04/25/2019 02:44 pm	No	Void

Figure 4: Highlight Multiple Receipts for Finalization

Note: When finalizing multiple sales receipts at once, it should be limited in the process to 100 receipts at a time.

This will prompt an action window to confirm the receipt finish dates and select the “Finalize Sales Receipts” button to complete the finalization. This step is shown below in **Figure 5**.



Sales Receipt #	Receipt
Sales Receipt # 1	0000000101
Sales Receipt # 2	0000000096
Sales Receipt # 3	0000000092
Sales Receipt # 4	0000000091
Sales Receipt # 5	0000000086

Figure 5: Finalize Multiple Sales Receipts

Please feel free to contact support at support@metric.com or 877-566-6506 with any questions.