

Subject: Steps Licensees Can Take to Improve Metrc Performance	
Bulletin Type <ul style="list-style-type: none"><input type="checkbox"/> New Functionality<input type="checkbox"/> Updated Functionality<input checked="" type="checkbox"/> Existing Functionality<input type="checkbox"/> Rules & Guidance<input type="checkbox"/> Events<input checked="" type="checkbox"/> Informational	Primary Audience: All Licensees Contact: Metrc Support Distribution Date: 04/15/2021 Effective Date: 04/15/2021 Bulletin Number: CA_IB_2021_003

As previously announced in bulletin CA_IB_2020_016, Metrc has begun efforts to optimize historical data to improve system performance, starting with *sales receipts* data. To maximize the benefits of data optimization in this area, retailers are strongly encouraged to finalize sales receipts that are unlikely to need further editing, ideally a week after the sale. Doing so will improve the performance of both the online sales receipts pages and API access to sales information.¹

Similarly, finishing packages once their quantity has reached 0 improves Metrc system performance. Users are strongly encouraged to finish packages that have a quantity of zero.

As a refresher, directions and screenshots are detailed below demonstrating how to finalize sales receipts and finish packages in Metrc.

¹ Metrc is looking at options for automating this function, such as providing API access to finalize sales or auto-finalizing sales after a certain amount of time. Until such measures are taken, manually finalizing receipts using the Metrc web application is the best way to improve Sales Receipts performance.

Finalizing and Unfinalizing Sales Receipts

The *Finalize* button, as shown in **Figure 1** below, is available on the *Active* tab on the *Sales Receipts* page. Finalizing a receipt moves that receipt to the *Inactive* tab.

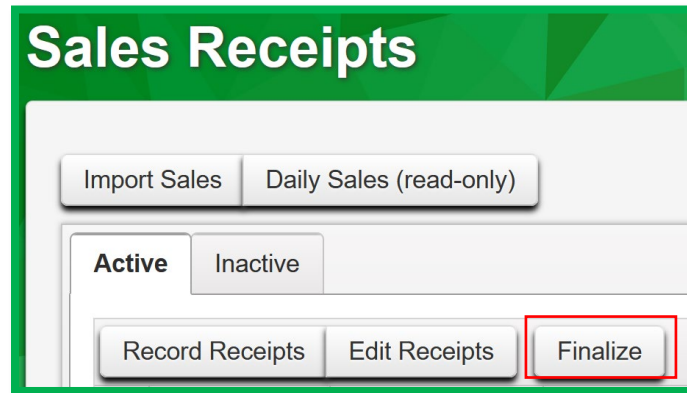


Figure 1: Active Sales Receipts Tab – Finalize Button

Conversely, the *Unfinalize* button, as shown in **Figure 2**, is available on the *Inactive* tab on the *Sales Receipts* page and is used to move a sales receipt back to the *Active* tab for editing.

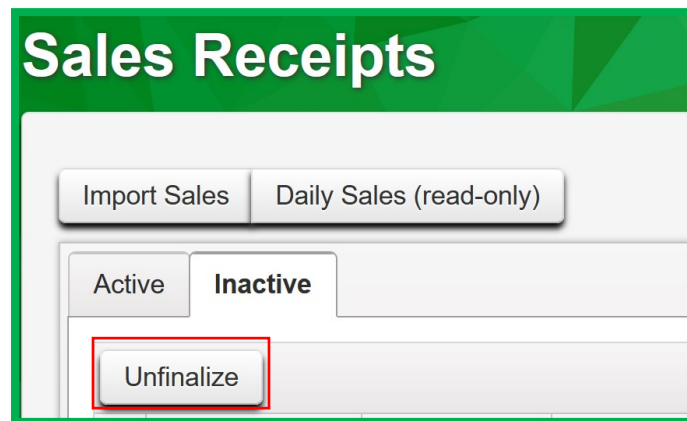


Figure 2: Inactive Sales Receipts Tab – Unfinalize Button

When a receipt is no longer active, select the receipt and click the *Finalize* button. On the action window shown in **Figure 3** verify the receipt number and click the green *Finalize Sales Receipts* button to complete the action.

Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing, such as a week after the sale. Larger facilities may want to *Finalize Sales Receipts* at a faster pace.

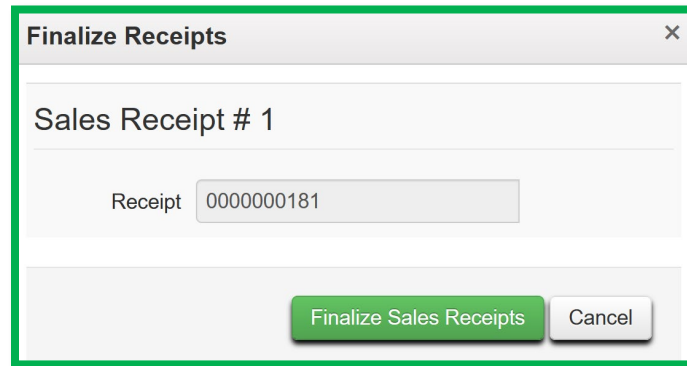


Figure 3: Finalize Sales Receipts

Finalizing a sales receipt removes the receipt from the list of active receipts that Metrc displays when editing sales receipts, which improves system performance.

If a *finalized* receipt later needs to be edited, select the receipt on the *Inactive* tab and click the *Unfinalize* button. Verify the receipt number on the action window shown in **Figure 4** below and click the green *Unfinalize Sales Receipts* button to complete the action.

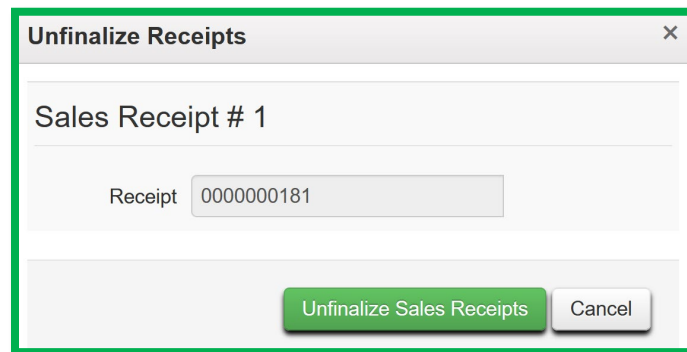
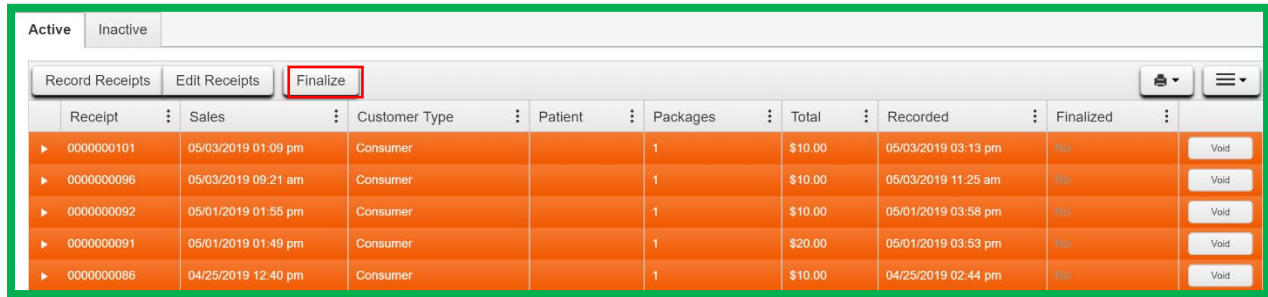


Figure 4: UnFinalize Sales Receipts

Unfinalizing a sales receipt moves the receipt back to the list of active receipts that can be edited.

Finalizing Multiple Receipts

Multiple sales receipts can be selected and finalized in a single action. To do this click and drag to highlight multiple receipts and then select the *Finalize* button, as shown in **Figure 5** below.

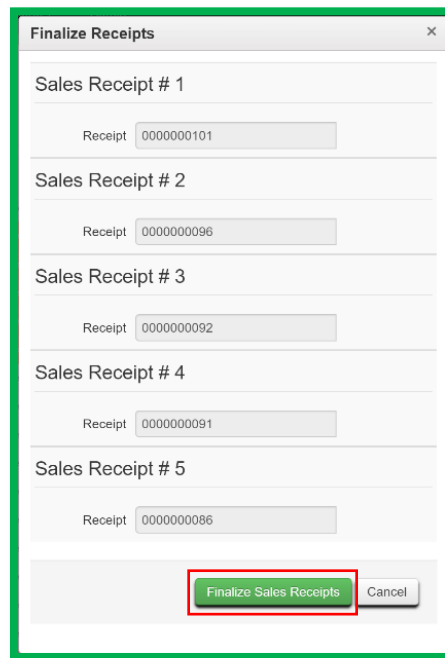


Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized	
▶ 000000101	05/03/2019 01:09 pm	Consumer		1	\$10.00	05/03/2019 03:13 pm	Yes	Void
▶ 000000096	05/03/2019 09:21 am	Consumer		1	\$10.00	05/03/2019 11:25 am	Yes	Void
▶ 000000092	05/01/2019 01:55 pm	Consumer		1	\$10.00	05/01/2019 03:58 pm	Yes	Void
▶ 000000091	05/01/2019 01:49 pm	Consumer		1	\$20.00	05/01/2019 03:53 pm	Yes	Void
▶ 000000086	04/25/2019 12:40 pm	Consumer		1	\$10.00	04/25/2019 02:44 pm	Yes	Void

Figure 5: Select Multiple Sales Receipts for Finalization

Note: When finalizing multiple sales receipts at once, an industry user should limit the process to around 100 receipts at a time.

On the action window shown in **Figure 6**, verify the receipt numbers and click the green *Finalize Sales Receipts* button to complete the action.



Finalize Receipts

Sales Receipt # 1
Receipt: 000000101

Sales Receipt # 2
Receipt: 000000096

Sales Receipt # 3
Receipt: 000000092

Sales Receipt # 4
Receipt: 000000091

Sales Receipt # 5
Receipt: 000000086

Finalize Sales Receipts Cancel

Figure 6: Finalize Multiple Sales Receipts

Finishing and Unfinishing Packages

If the remaining quantity of a package is zero (0), the package should be *finished*. Finishing a package removes the package from the list of active packages that Metrc displays when one of the actions available on the Active tab is taken, which improves system performance.

The *Finish* button, as shown **Figure 7** in below, is available on the *Active* tab on the *Packages* page. Finishing a package moves that package to the *Inactive* tab.

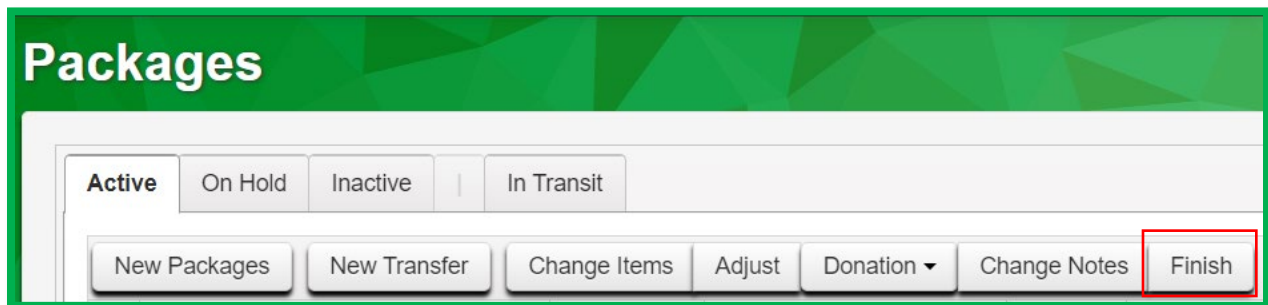


Figure 7: Active Packages Tab – Finish Button

Conversely, the *Unfinish* button, as shown in **Figure 8**, is available on the *Inactive* tab on the *Packages* page and is used to move a package back to the *Active* tab where actions, such as adjustments, can be taken. It is also necessary for retailers to *unfinish* packages in order to record a sales receipt or edit a previously recorded sales receipt which includes a sale from a *finished* package.

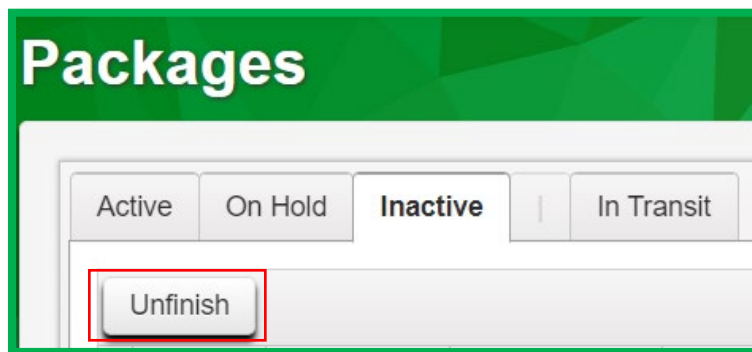


Figure 8: Inactive Packages Tab - Unfinish Button

When the quantity of a package is zero (0), select the package and click the *Finish* button. On the action window shown in **Figure 9** below, verify the package, enter the date finished, and click the green *Finish Package* button to complete the action.

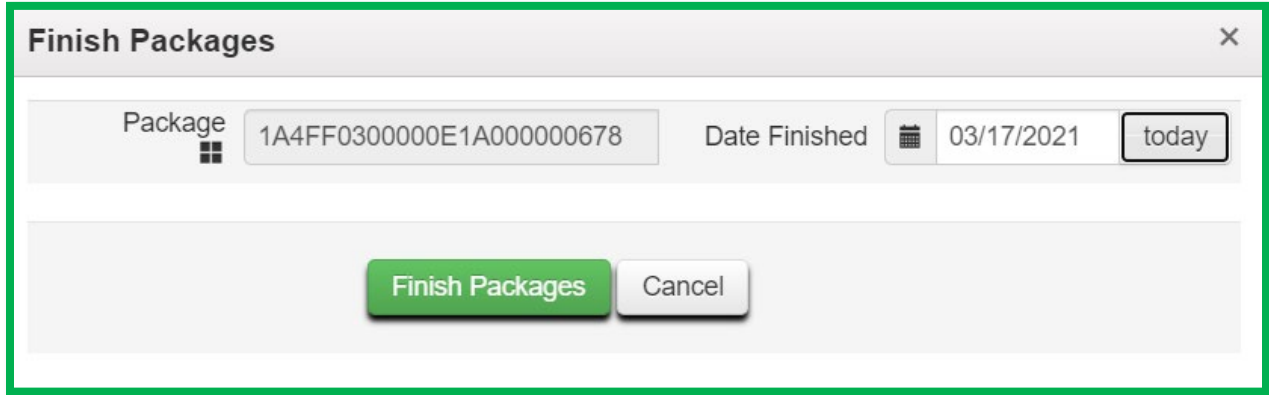


Figure 9: Finish Packages

If an action later needs to be taken on a *finished* package, select the package on the *Inactive* tab and click the *Unfinish* button. Verify the package on the action window shown in **Figure 10** below and click the green *Unfinish Package* button to complete the action.

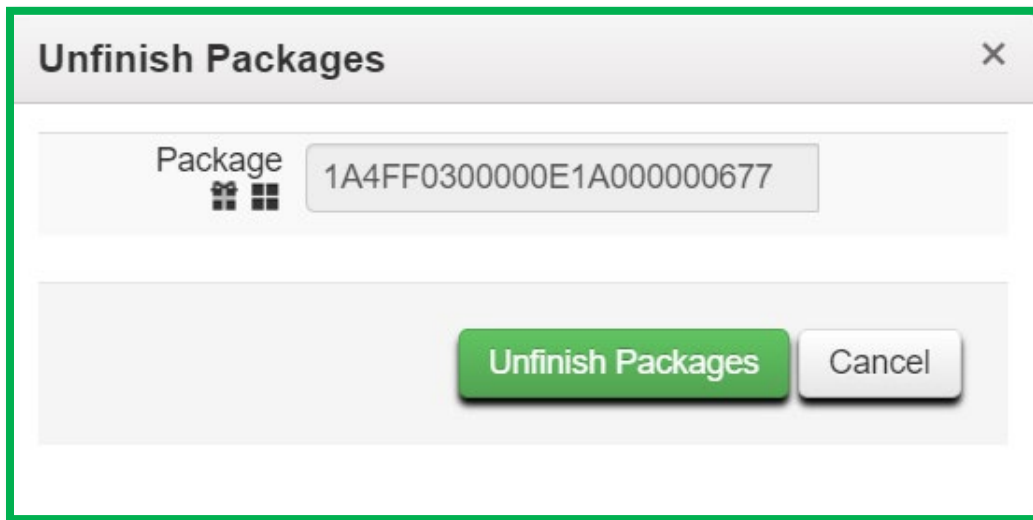


Figure 10: Unfinish Packages

Unfinishing a package moves the package back to the list of active packages.

Finishing Multiple Packages

Multiple zero quantity packages can be selected and finished in a single action. To do this click and drag to highlight multiple packages and then select the *Finish* button, as shown in **Figure 11** below.

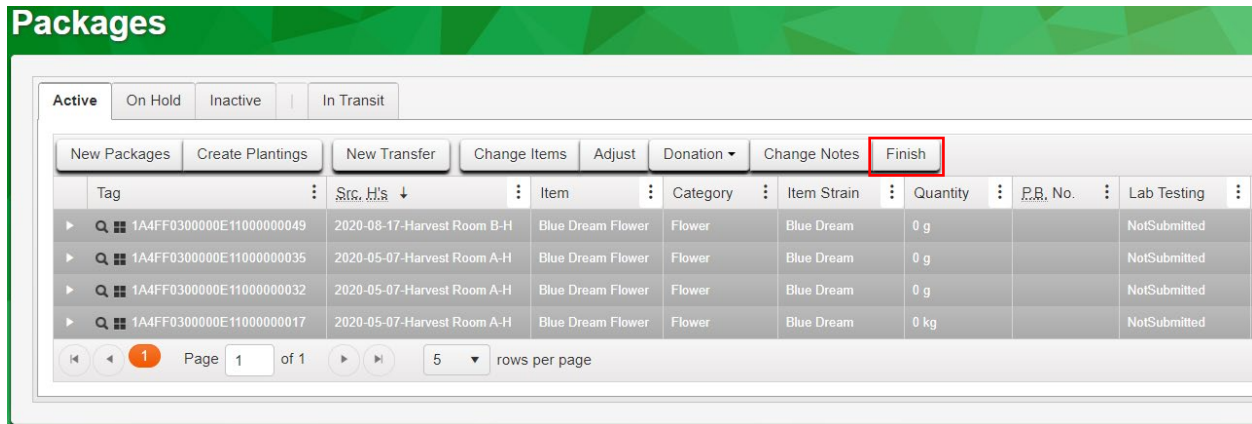


Figure 11: Select Multiple Zero Quantity Packages for Finishing

Note: When finishing multiple packages at once, limit the process to around 100 packages at a time.

On the action window shown in **Figure 12**, verify the packages, select the *Date Finished* in the *Template* section and click the checkmark button to apply the date to all packages, and then click the green *Finish Packages* button to complete the action.

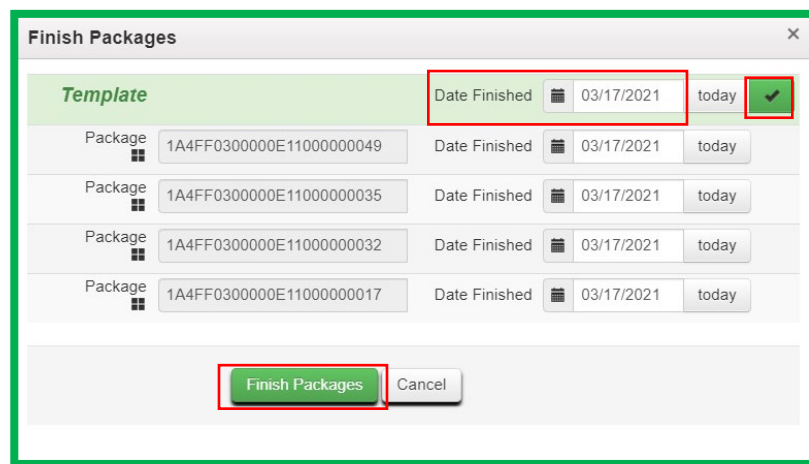
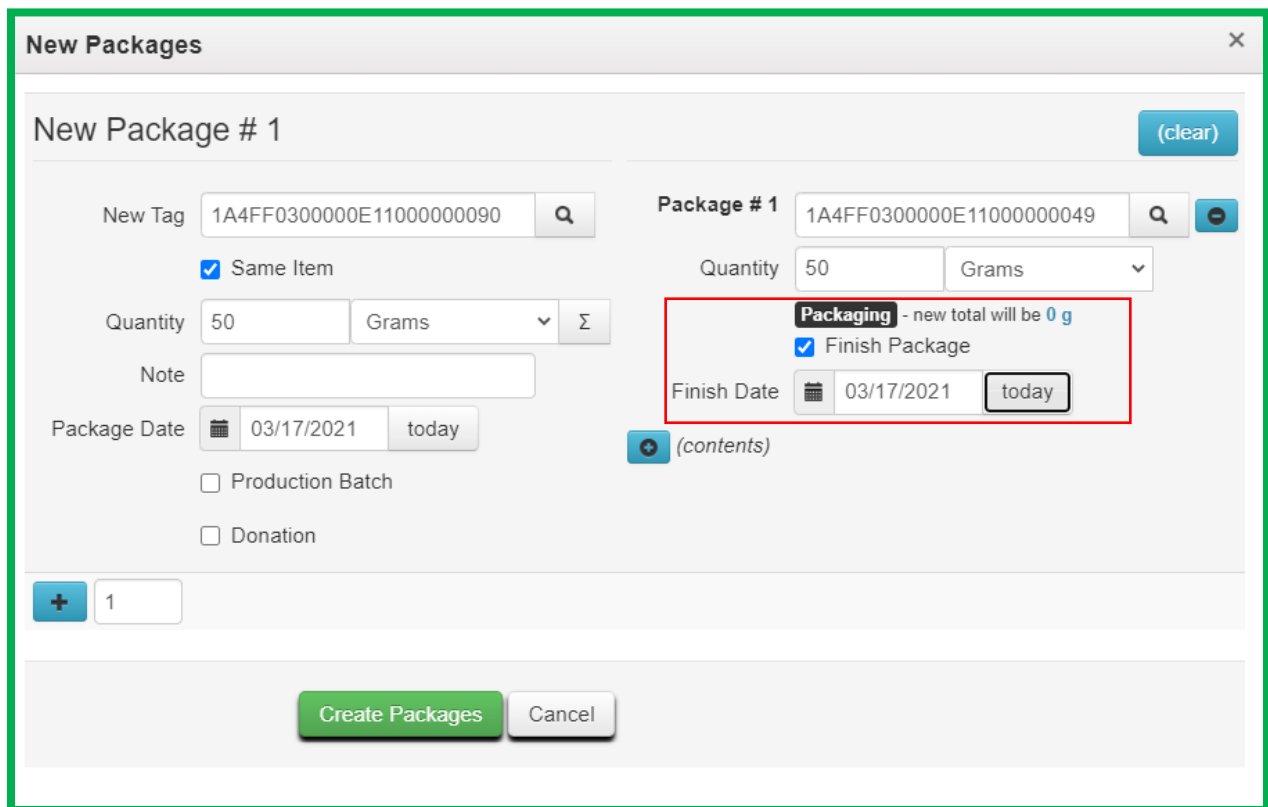


Figure 12: Finish Multiple Packages

Finish Package When Creating New Package

If the remaining quantity of a source package is calculated to be zero (0) when creating a new package, the source package can be finished at the same time as creating the new package. **Figure 13** below shows an example of finishing a source package when creating a new package by marking the *Finish Package* checkbox (defaults to unmarked) and identifying a *Finish Date*. When the green *Create Packages* button is selected, the source package moves to the *Inactive* tab of the *Packages* page.



The screenshot shows a web form titled "New Packages" with a close button (X) in the top right corner. The form is for creating a new package, labeled "New Package # 1" with a "(clear)" button. It contains several input fields and checkboxes:

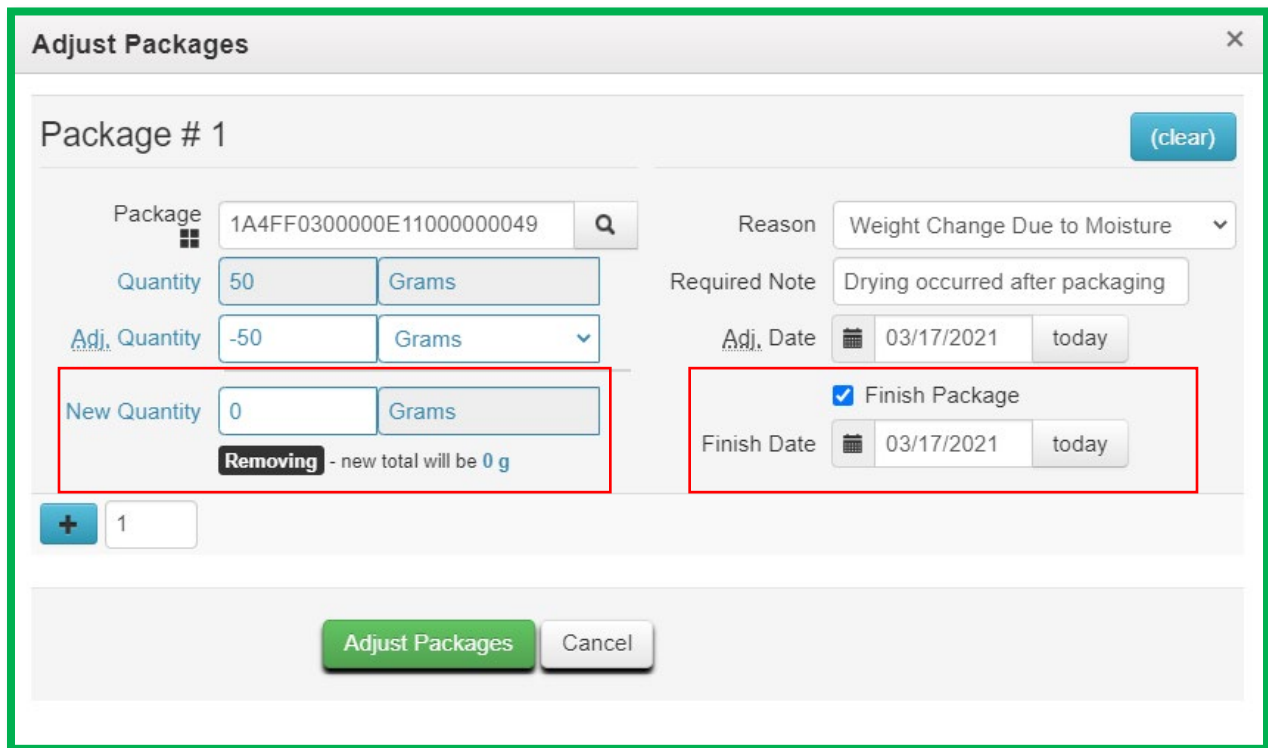
- New Tag:** 1A4FF0300000E11000000090
- Package # 1:** 1A4FF0300000E11000000049
- Quantity:** 50 Grams
- Same Item:**
- Finish Package:** (highlighted in a red box)
- Finish Date:** 03/17/2021 (with a "today" button, also highlighted in a red box)
- Production Batch:**
- Donation:**

At the bottom of the form, there is a "Create Packages" button and a "Cancel" button. A small notification box above the "Finish Package" checkbox says "Packaging - new total will be 0 g".

Figure 13: Finish Package When Creating New Package

Finish Package When Adjusting a Package

If the *New Quantity* is calculated to be zero (0) when adjusting a package, the package can be finished at the same time as the recording the adjustment. **Figure 14** below shows an example of finishing a package while adjusting the package by marking the *Finish Package* checkbox (defaults to unmarked) and identifying a *Finish Date*. When the green *Adjust Packages* button is selected, the package moves to the *Inactive* tab of the *Packages* page.



The screenshot shows the 'Adjust Packages' interface. At the top, it says 'Adjust Packages' with a close button. Below that, 'Package # 1' is displayed with a '(clear)' button. The form is divided into two main sections. The left section contains: 'Package' (ID: 1A4FF0300000E11000000049), 'Quantity' (50 Grams), 'Adj. Quantity' (-50 Grams), and 'New Quantity' (0 Grams). A 'Removing' button is visible below the 'New Quantity' field, with the text '- new total will be 0 g'. The right section contains: 'Reason' (Weight Change Due to Moisture), 'Required Note' (Drying occurred after packaging), 'Adj. Date' (03/17/2021), and 'Finish Date' (03/17/2021). A 'Finish Package' checkbox is checked. At the bottom, there are '+ 1' buttons and 'Adjust Packages' and 'Cancel' buttons.

Figure 14: Finish Package When Adjusting a Package

We appreciate your understanding and support as we continue to improve our system for all users. Please contact support@metrc.com with any questions or concerns.