

Bulletin Number: MT_IB_0021	Distribution Date: 12/9/2020	Effective Date: 12/16/20
Contact Point: Metrc® Support	Subject: Sales Data Optimization Update	
Reason: Updating users with the next steps of Metrc's Data Optimization Plan		

Greetings Metrc Users,

As we previously noted in bulletin 16, Metrc will begin optimizing historical data on **December 16th** – starting with Sales Receipts and Deliveries that are finalized or completed respectively – to further improve system performance within those areas. This optimization effort is not expected to affect users, and throughout the entire process both Sales Receipts and Deliveries data will still be able to be accessed within the current UI and users can “un-finalize” sale receipts, if necessary.

To maximize the benefits of data optimization, *users are **strongly encouraged** to finalize sales receipts and complete or void sales deliveries that are no longer active.* Metrc has provided users the ability to finalize sales, and complete or void sales deliveries. As a refresher, directions and screenshots are detailed below:

Sales Receipt Finalize and Unfinalize Buttons

The Sales Receipt section of Metrc allows receipts to be finalized which prompts them to be moved from the Active tab to the Inactive tab or Unfinalize a receipt to move it back to the Active tab. As shown within the Figures below, under the Active Sales Receipts tab the Finalize button is visible. Whereas within the Inactive Sales Receipts Tab, the Unfinalize button is visible.

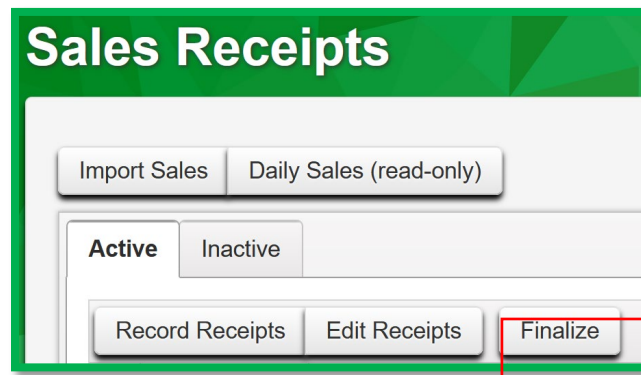


Figure 1: Active Sales Receipts Tab

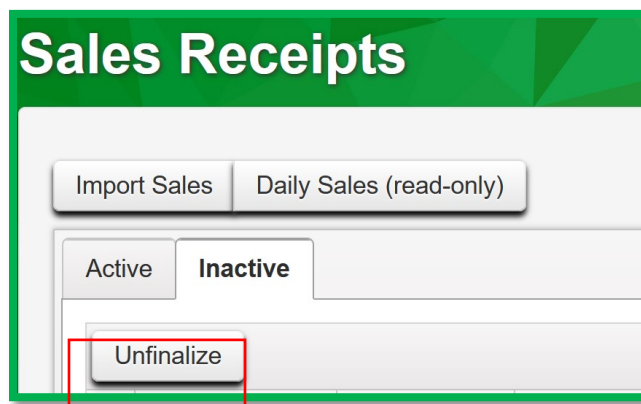


Figure 2: Inactive Sales Receipts Tab

When a receipt is no longer active, select the receipt and click the Finalize button. The following window seen within **Figure 3** will appear. Verify the receipt number and click the “Finalize Sales Receipts” button.

Note: *A receipt should be considered “no longer active” once it becomes unlikely that it will need editing.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

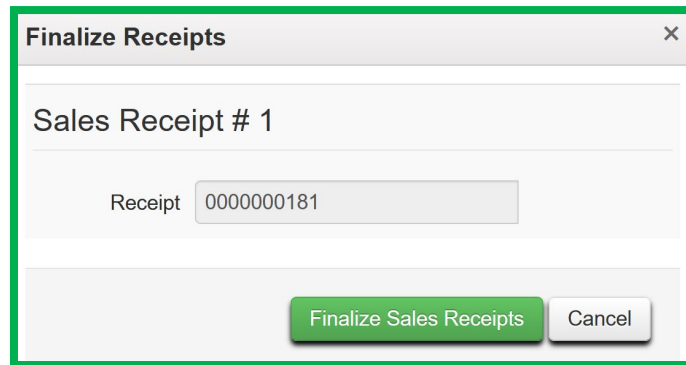
A screenshot of a web application dialog box titled "Finalize Receipts". The dialog has a close button (X) in the top right corner. Inside, it says "Sales Receipt # 1". Below that is a text input field labeled "Receipt" containing the number "0000000181". At the bottom right, there are two buttons: a green button labeled "Finalize Sales Receipts" and a grey button labeled "Cancel".

Figure 3: Finalize Sales Receipt

Finalizing sales receipts will remove the receipt from the list of active receipts Metrc pulls when editing 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 Inactive grid. Select the desired receipt and click the Unfinalize button. The following window shown in **Figure 4** will appear. Verify the receipt number and click the “Unfinalize Sales Receipts” button.

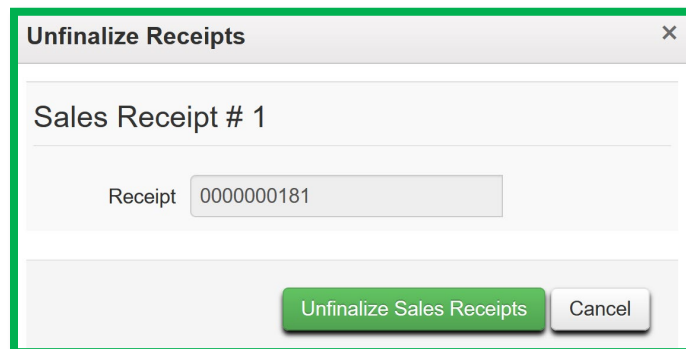
A screenshot of a web application dialog box titled "Unfinalize Receipts". The dialog has a close button (X) in the top right corner. Inside, it says "Sales Receipt # 1". Below that is a text input field labeled "Receipt" containing the number "0000000181". At the bottom right, there are two buttons: a green button labeled "Unfinalize Sales Receipts" and a grey button labeled "Cancel".

Figure 4: Unfinalize Sales Receipt

Finalizing Multiple Receipts

Industry users can select multiple receipts and finish them at one time. To do this, click and drag to select multiple receipts (all receipts that are highlighted in orange), then select the finalize button.


Active


Inactive

Record Receipts

Edit Receipts

Finalize



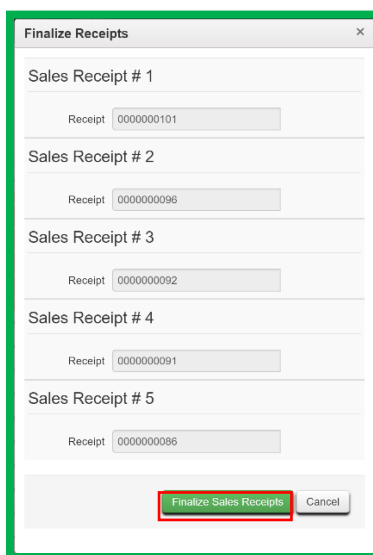


Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized	
▶ 0000000101	05/03/2019 01:09 pm	Consumer		1	\$10.00	05/03/2019 03:13 pm	No	Void
▶ 0000000096	05/03/2019 09:21 am	Consumer		1	\$10.00	05/03/2019 11:25 am	No	Void
▶ 0000000092	05/01/2019 01:55 pm	Consumer		1	\$10.00	05/01/2019 03:58 pm	No	Void
▶ 0000000091	05/01/2019 01:49 pm	Consumer		1	\$20.00	05/01/2019 03:53 pm	No	Void
▶ 0000000086	04/25/2019 12:40 pm	Consumer		1	\$10.00	04/25/2019 02:44 pm	No	Void

Figure 5: Finalize Multiple Sales Receipts

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



Finalize Receipts [X]

Sales Receipt # 1
Receipt: 0000000101

Sales Receipt # 2
Receipt: 0000000096

Sales Receipt # 3
Receipt: 0000000092

Sales Receipt # 4
Receipt: 0000000091

Sales Receipt # 5
Receipt: 0000000086

Finalize Sales Receipts Cancel

Figure 6: Finalize Multiple Sales Receipts

Active and Inactive Sales Deliveries Update

Similar to the Active/Inactive Sales Receipts tabs, there will also be an Active/Inactive Sales Deliveries tab. Within the Active Tab in **Figure 7**, there will be the same functions (Record, Edit, and View) as currently available.

With the new Inactive Tab in **Figure 8**, there will only be the ability to View the Manifest at this time which is consistent with how the current deliveries functionality works today.

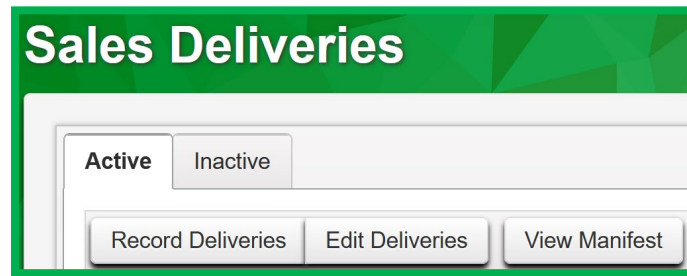


Figure 7: Active Sales Deliveries Tab

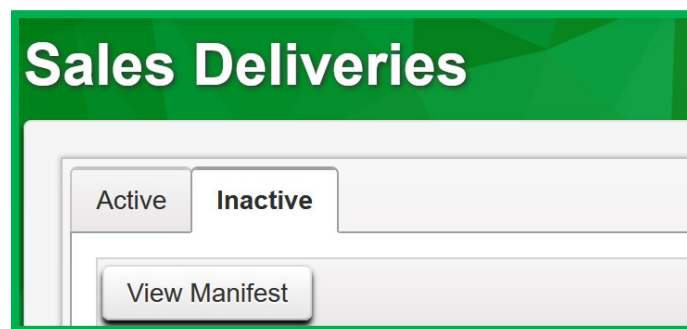


Figure 8: Inactive Sales Receipts Tab

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