

<b>Bulletin Number:</b> OH_IB_026	<b>Distribution Date:</b> 9/25/2020	<b>Effective Date:</b> 9/28/20
<b>Contact Point:</b> Metrc® Support	<b>Subject:</b> Sales Data Optimization Update	
<b>Reason:</b> Updating users with the next steps of Metrc's Data Optimization Plan		

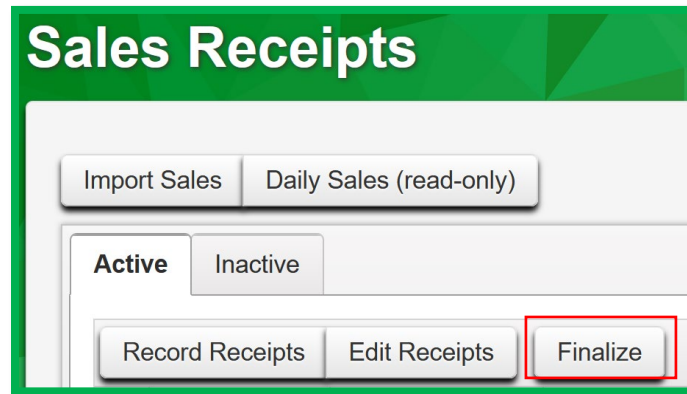
Greetings Metrc Users,

As we previously noted in bulletins Oh\_IB\_023 Metrc will begin optimizing historical data – 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.

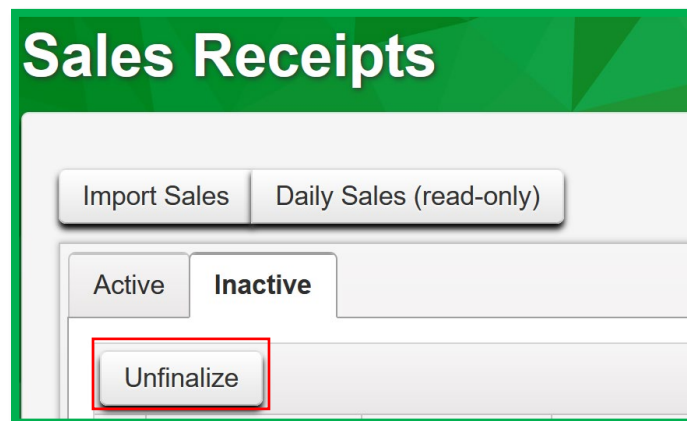
To maximize the benefits of data optimization, *users are strongly encouraged to finalize sales receipts and complete or void sales deliveries that are no longer active.* Metrc has provided users the ability to finalize sales, and complete or void sales deliveries. As a refresher, directions and screenshots 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 moved it back to the Active tab. As you'll see 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.



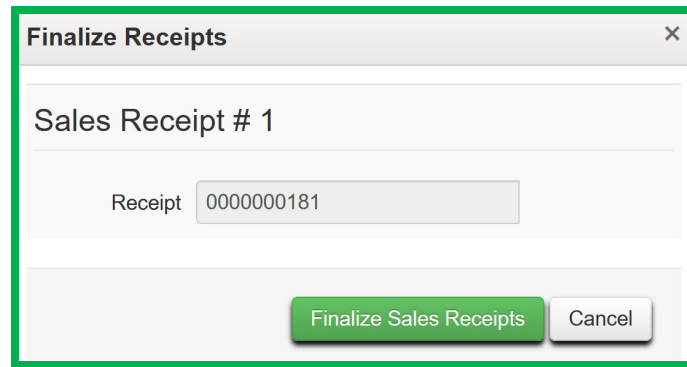
**Figure 1: Active Sales Receipts Tab**



**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When a receipt is no longer active, select the receipt and click the Finalize button.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.

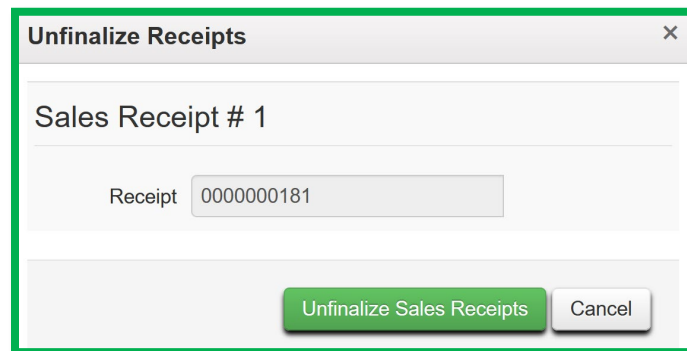
**Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing. Larger facilities with sales may want to Finalize older Sales Receipts at a faster pace (e.g. on a weekly basis).**



**Figure 3: Finalize Sales Receipt**

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.**

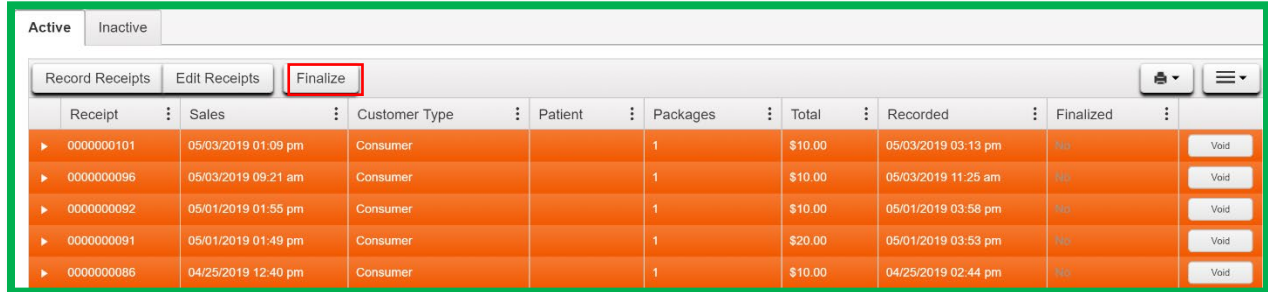
If a “finalized” receipt later needs to be edited, utilize the Unfinalize button on the Sales Receipts Inactive grid. Select the desired receipt and click the Unfinalize button. The following window within **Figure 4** will appear. Verify the receipt number and click the “Unfinalize Sales Receipts” button.



**Figure 4: Unfinalize Sales Receipt**

## **Finalizing Multiple Receipts**

Multiple receipts can be selected 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.

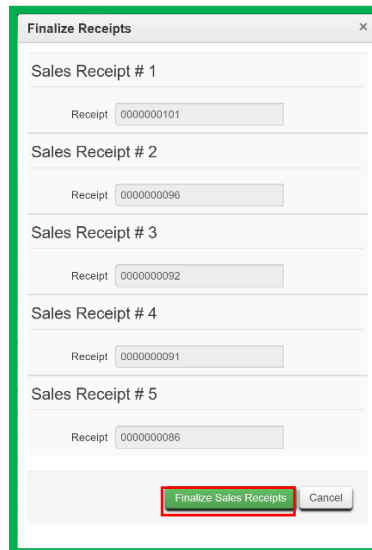


Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized	
▶ 000000101	05/03/2019 01:09 pm	Consumer		1	\$10.00	05/03/2019 03:13 pm	Yes	Void
▶ 000000096	05/03/2019 09:21 am	Consumer		1	\$10.00	05/03/2019 11:25 am	Yes	Void
▶ 000000092	05/01/2019 01:55 pm	Consumer		1	\$10.00	05/01/2019 03:58 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: Finalize Multiple Sales Receipts**

**Note: When finalizing multiple sales receipts at once, you 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

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

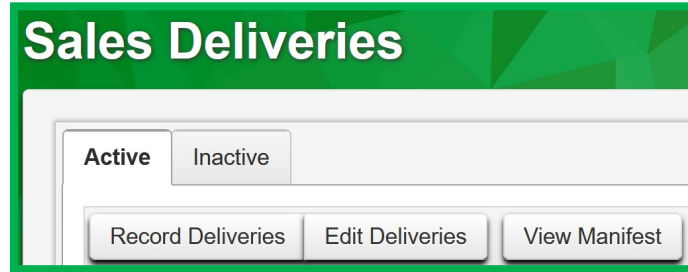
**Finalize Sales Receipts** Cancel

**Figure 6: Finalize Multiple Sales Receipts**

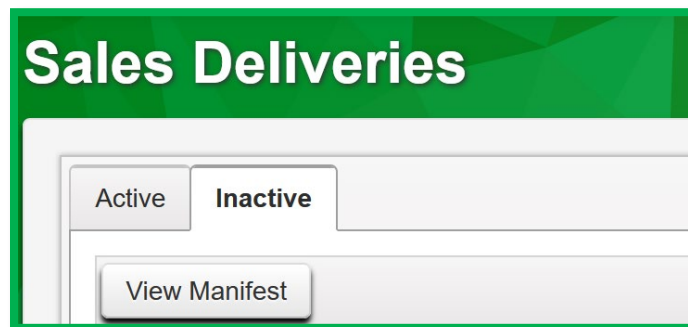
## **Active and Inactive Sales Deliveries Update**

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**, the same functions will be available (Record, Edit, and View) as you currently do.

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



**Figure 7: Active Sales Deliveries Tab**



**Figure 8: Inactive Sales Receipts Tab**

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