Metrc Support Bulletin



Bulletin Number: OR_IB_0030	Distribution Date: 9/10/2020	Distribution Date: 9/10/2020 Effective Date: 9/14/2020							
Contact Point: Metrc® Support Subject: Caregiver Patient Number Field									
Reason: Metrc is providing an update recreational retailers	on the most recent change regar	ding to caregiver sales by							

The OLCC and Metrc are providing information on an upcoming change to the available Customer Types a Recreational Retailer can record sales to. Starting on 9/14/2020, a Recreational Retailer will be able to record Caregiver Sales in addition to the already available Consumer and Patient Customer Types. When selecting a Caregiver as the Customer Type, users will be required to enter both the Caregiver and Patient License Number. This change will also be supported via the API or CSV upload functions. Metrc will also be releasing API Bulletin 76 informing Third Party Integrators (TPI's) of the new available Customer Type.

Please see the following pages for additional details on this change.

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Recording a Caregiver Sale

For the creation of a manual sales receipt, the user will select the sales drop down from the navigation bar. The user will then select the "Receipts" option as seen in **Figure 1** to open the Sales Reciepts page.

Packages	Transfers -	Sales ▼	Reports 🗸	Admin 👻
vinte		Receipts		
sipts		Deliveries		

Figure 1: Creating a Sales Reciept

Once on the sales receipts page, select the "Active" tab in **Figure 2** to bring you to the active receipts grid, where you will be able to record receipts. Next, the user will select the record receipts button to begin creating the new receipt as seen **in Figure 3**.

Sales Receipts	
Import Sales Daily Sales (read-only)	
Active Inactive	
	Please select a tab to view its content.

Figure 2: Sales Receipts Page

	_									
ctive	Inactive									
Record Receipts Edit Receipts Finalize									· · · =	•
F	Receipt :	Sales	Customer Type	Patient :	Caregiver :	Packages :	Total	Recorded	Finalized :	
► 0	000002376	08/05/2020 12:00 pm	Consumer			1	\$50.00	08/05/2020 11:01 am	No	Void
► 0	000002372	08/05/2020 11:42 am	Consumer			1	\$100.00	08/05/2020 10:43 am	No	Void
			-				0400.00	00/40/0047 00:40	Ne	



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The recording receipts action window will open, and the user will enter the necessary information for the sale. When selecting the customer type, the Caregiver button will prompt two fields, caregiver and patient number, to open. Fill these fields with the caregiver number and the respective patient number for whom the caregiver is making the purchase.

Record Receipts		×
Sales Receipt # 1		(clear)
Sale 08/07/2020 today Date/Time 09 : 34 AM	Customer	 Consumer Patient Caregiver
× ×	Caregiver <u>No.</u>	Example
	Patient <u>No.</u>	Example
Package # 1 ABCDEF012345670000012172 Q (clear)	Quantity	2 Grams ~
Available 9 g	Total Price	\$ 22.00
(package)		
+ 1		
Record Sales Receipts Cancel		

Figure 4: Selecting Customer Type: Caregiver

When the information is recorded and correct, select the record sales receipts button and the receipt will be posted to the active receipts page where it could later be edited or finalized as seen in **Figure 5**.

ſ	Act	tive	Inactive]															
	Record Receipts Edit Receipts Finalize																		
		Re	ceipt	:	Sales	:	Customer Type	÷	Patient	:	Caregiver :	Packages	:	Total :	Recorded	:	Finalized	:	
	•	000	0002401		08/07/2020 09:34 a	am	Caregiver		Example		Example	1		\$22.00	08/11/2020 11:51 ar	n	No		Void

Figure 5: Sales Receipts Grid



Recording a Caregiver Sale via CSV Upload

For CSV uploads, include the information in the following order in respective columns from A to H; Sales (Date and time sale was made), Customer type, Patient (Patient Number), Caregiver (Caregiver Number), Package Tag UID (Package Number), Quantity Sold, Unit of Measure of Package Sold, Pre-Tax Price Collected.

Sales	Customer Type	Patient	Caregiver	Package	Quantity	UoM	Price
6/30/2019 11:02	Caregiver	xxx-xx-xxxx	xxx-xxx-xxxx	1A40101000249F200000002	3	Grams	10.99

Figure 6: CSV Format

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