

Bulletin Number: OR_IB_0030	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 on the most recent change regarding to caregiver sales by recreational retailers		

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.

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 Receipts page.

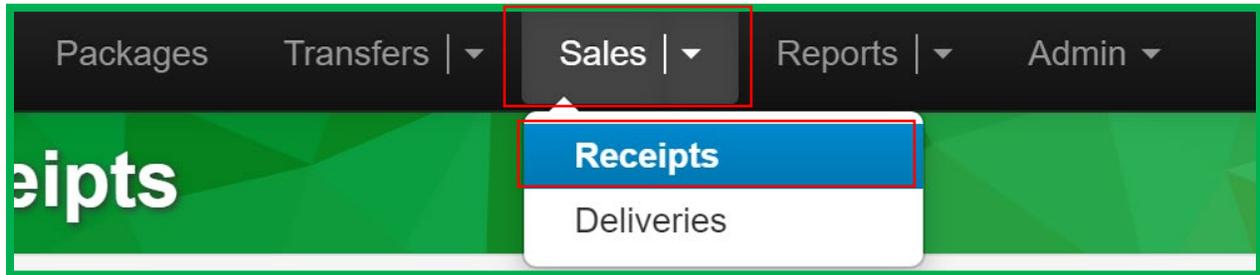


Figure 1: Creating a Sales Receipt

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**.

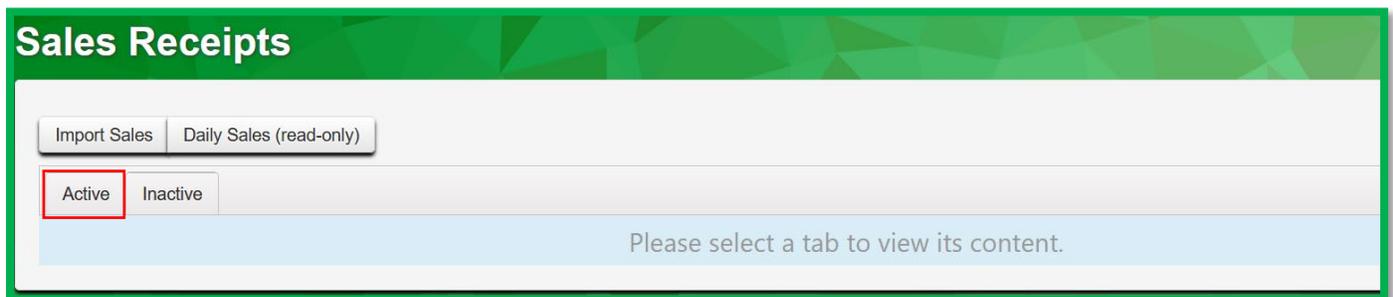


Figure 2: Sales Receipts Page

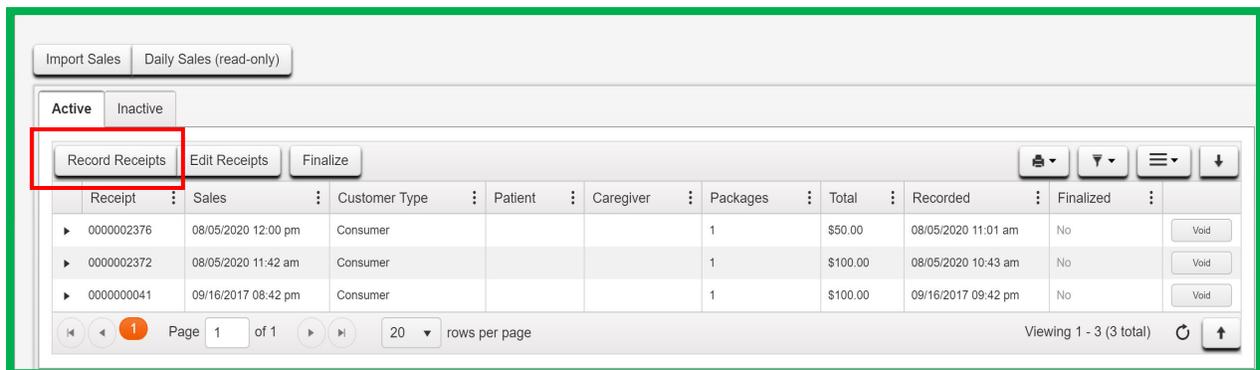


Figure 3: Record Receipts

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.

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**.

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	1A40101000249F2000000002		3 Grams	10.99

Figure 6: CSV Format

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