

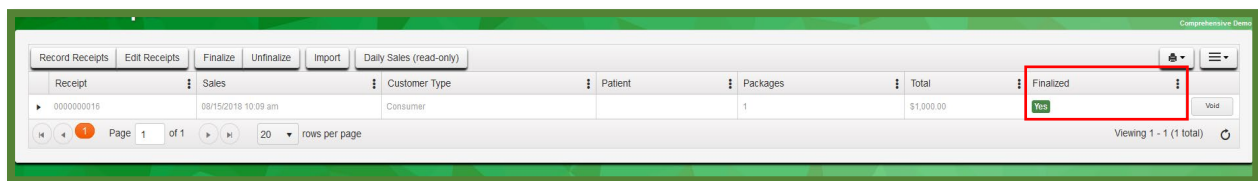
<b>Bulletin Number:</b> MA_IB_0014	<b>Distribution Date:</b> 10/17/19	<b>Effective Date:</b> Ongoing
<b>Contact Point:</b> Metrc® Support	<b>Subject:</b> Finalizing Sales Receipts	
<b>Reason:</b> Metrc is providing additional guidance on finalizing sales receipts to improve system performance.		

Greetings Metrc Users,

Metrc would like to advise on Finalizing Sales receipts. Receipts should be finalized up to the last week. Finalizing your receipts will speed up the sales receipts area and help with editing times for receipts if your active receipt total exceeds 50,000. You may finalize multiple receipts at a time.

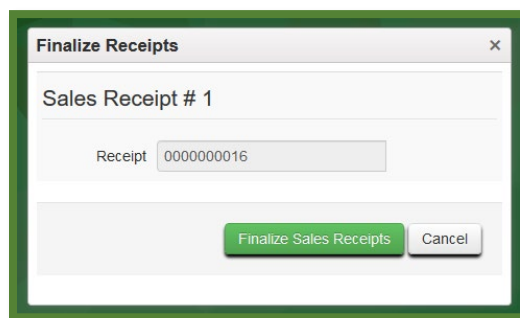
## Sales Receipt Finalize and Unfinalize Buttons

The Sales Receipt section of Metrc was previously updated to include two new buttons: Finalize and Unfinalize. A new Finalized column (filterable) has been added to the Sales Receipt grid as well.



**Figure 1: New Finalized Sales Receipt Field**

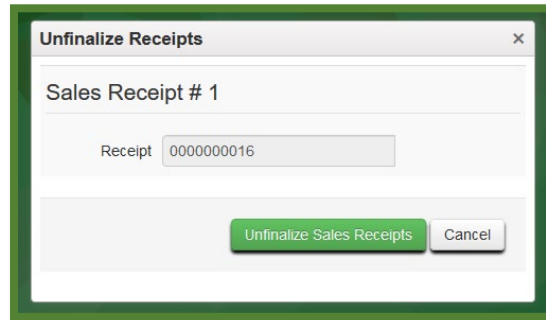
When a receipt is no longer active, select the receipt and click the Finalize button. The following window will appear. Verify the receipt number and click the “Finalize Sales Receipts” button. **Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing. Larger stores may want to Finalize older Sales Receipts at a faster pace (e.g., weekly).**



**Figure 2: Finalize Sales Receipt Action Window**

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.**

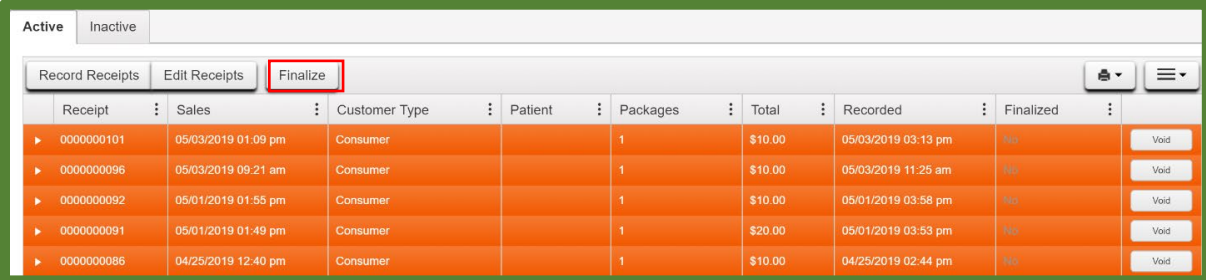
If a “finalized” receipt later needs to be edited, utilize the Unfinalize button on the Sales Receipts grid. Select the desired receipt and click the Unfinalize button. The following window will appear. Verify the receipt number and click the “Unfinalize Sales Receipts” button.



**Figure 3: 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, then select the finalize button.

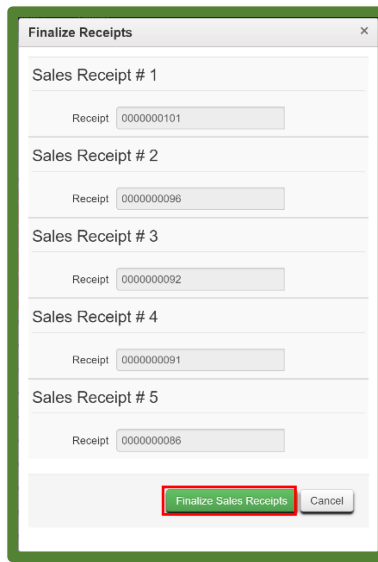


Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized	
▶ 000000101	05/03/2019 01:09 pm	Consumer		1	\$10.00	05/03/2019 03:13 pm	Yes	Void
▶ 000000096	05/03/2019 09:21 am	Consumer		1	\$10.00	05/03/2019 11:25 am	Yes	Void
▶ 000000092	05/01/2019 01:55 pm	Consumer		1	\$10.00	05/01/2019 03:58 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 4: Highlight Multiple Receipts for Finalization**

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

This will prompt an action window where the industry user will confirm the receipt finish dates and select the “Finalize Sales Receipts” button to complete the finalization.



The screenshot shows a dialog box titled "Finalize Receipts" with a close button (X) in the top right corner. It contains five sections, each for a sales receipt:

- 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

At the bottom of the dialog, there are two buttons: "Finalize Sales Receipts" (highlighted with a red box) and "Cancel".

**Figure 5: Finalize Multiple Sales Receipts**

Please feel free to email [support@metrc.com](mailto:support@metrc.com) or call 877-566-6506 with any questions.