Metrc Support Bulletin

Bulletin Number: NV_IB_034	**Distribution Date**: 4/22/20	**Effective Date**: 4/21/20
Contact Point: Metrc® Support	**Subject:** Intermittent Performance Issue Update and Delivery vs. Receipt Overview	
Reason: Metrc is providing information regarding the intermittent performance issues reported along with reminders on Sales Deliveries versus Sales Receipts.		

Greetings Metrc Users,

This bulletin is intended to provide information on the following topics:[1]

I.   Intermittent performance issues that some licensees have experienced
II.   Proper Usage of Sales Delivery versus Sales Receipts
III.   Steps for Finalizing Sales Receipts
IV.   Application Programming Interface (API) usage for Sales Delivery
V.   Training and Support

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[1] Detailed descriptions of each change are provided on the following pages.

I.   Intermittent Performance Issue Update

Metrc is aware of the intermittent reports from licensees and third-party vendors regarding performance issues for deliveries and transfers for Nevada users. The Metrc team has been reviewing the reports and working diligently on a resolution to correct these issues. If a licensee experiences an intermittent issue, the licensee needs to take the following steps:

1. Select the Support Dropdown and Click "Refresh User Session."
2. Once the session is refreshed, try the action you were unable to complete again.
3. If the issue persists, please email support@metrc.com with the action you were trying to complete along with the date/time from your device where the issue occurred. **Please do not email in the same screenshot if you are stating the issue is occurring multiple times.**
4. If the issue is resolved, it is also extremely helpful to send confirmation back to Metrc Support so Metrc can properly manage the issue.

The Metrc team wants to thank all licensees who reached out and provided very helpful information on this matter. The Metrc team also wants to express appreciation to those who follow the steps above to ensure accurate and up to date information is in place for the corrective action that is already underway.

II.   Sales Deliveries vs Sales Receipts

It is important for users conducting sales to understand that a delivery and an in-store sale are considered **two separate types** of sales actions and reported differently in Metrc.

- Any transaction that takes place on the licensed premises is reported as a **"Sale Receipt."**
- Any transaction that takes places off the licensed premises is reported as a **"Sale Delivery."**
- **You should NOT be reporting a receipt and a delivery for the same transaction.**

All Employees who need access must be granted the appropriate permissions by their Metrc admin in order to access the related functions. If an employee does not have permissions for Sales Deliveries, that employee will not be able to report Sales Deliveries. The permission can be found when editing an employee's permissions within the **Sales Menu** for **Dispensaries** only as displayed below in **Figure 1**.
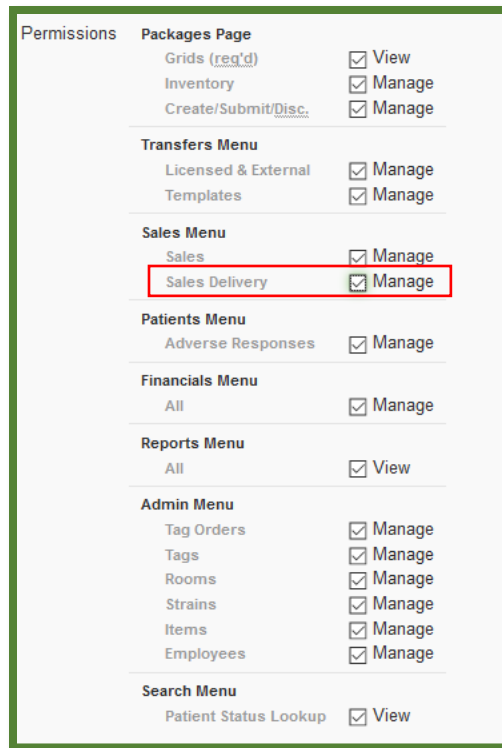
Figure 1: Employee Permissions

Once the permission is granted to a user, the sales delivery option can be found beneath the sales area on the navigational toolbar as shown below in **Figure 2**.
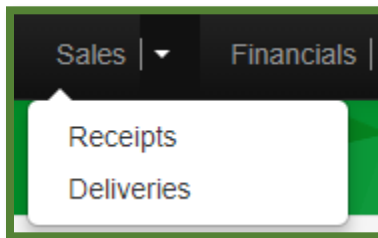

Figure 2: Selectable Sales Options

In Metrc, sales deliveries are reported differently than in-store sales receipts. Reporting a sales delivery as an in-store sales receipt within Metrc will not meet the **regulatory requirements and negatively affect the state tax requirements**. To differentiate between the two, please see following.

- Sales receipts indicate that the transaction took place within the licensed premises of the Dispensary.

- Sales deliveries indicate that active inventory within a Dispensary was taken off the licensed premises and delivered to a patient or consumer.

- Dispensaries should never be recording the same transaction as a sales receipt and sales delivery.

Just like a transfer manifest is created within Metrc, a sales delivery manifest is required to be created once the order has been placed by the patient or consumer. When recording the necessary information within the sales delivery manifest, it is important to ensure the patient number accurately reflects the card number provided to the Dispensary.
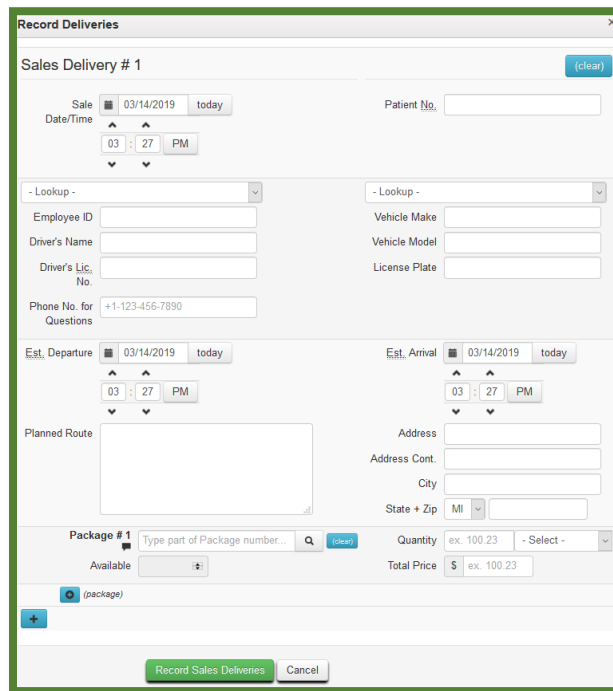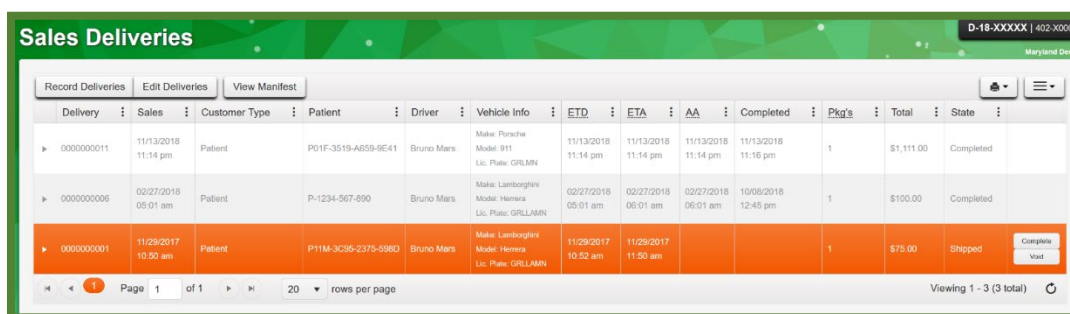

Figure 3: Recording Sales Deliveries

Each delivery to a patient or consumer should be recorded separately. If a Dispensary is making multiple deliveries, the planned route should notate this information. Once the sales delivery is recorded, it is considered open in Metrc. As you will see below in **Figure 4**, there are two completed deliveries that cannot be edited once the "Complete" button on the far right is selected by the Dispensary employee. If the delivery is still open, the employee can edit, or void as needed.

Figure 4: Sales Deliveries Grid

When a delivery is recorded in Metrc as "Complete," the inventory is removed from the package and marked as a delivery. Remember, you should NOT report a "Sale Receipt" and a "Sale Delivery" for the same transaction. This will cause inventory to be removed from the affected package twice which would display as **Figure 5** in Metrc.
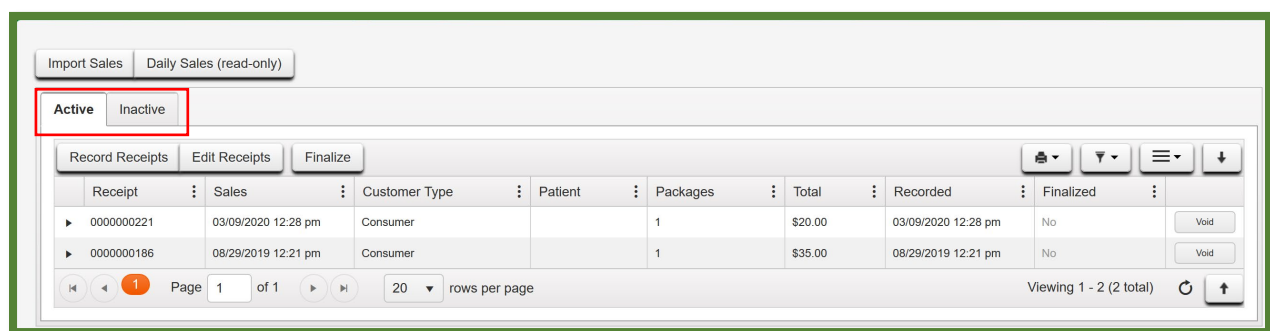

Figure 5: Packages History Example

III.   Sales Receipt Finalize and Unfinalize Buttons

Metrc would like to provide further guidance on finalizing sales receipts. It is recommended that users who report sales into the system, finalize receipts in Metrc periodically. Finalizing the receipts will improve system performance in the sales area and decrease the editing times for receipts if your active receipts total exceeds 100,000 receipts. The Sales Receipt section of Metrc was previously updated to include two new buttons: Finalize and Unfinalize. A new Finalized column (which is filterable) has been added to the Sales Receipt grid along with an Active/Inactive tab as shown in **Figure 6**. All finalized sales can be found within the inactive tab. This is similar to how the packages Active/Inactive tab functions.

Figure 6: 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 as shown in **Figure 7**. 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. on a weekly basis).***
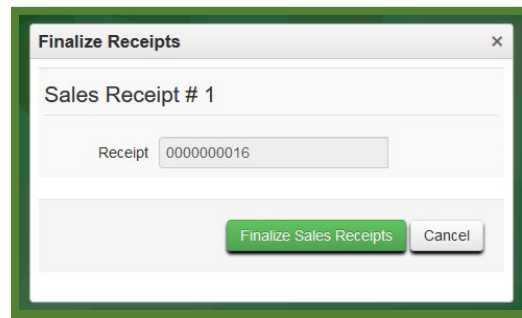

Figure 7: Finalize Sales Receipt Action Window

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, then click the Unfinalize button. The following window will appear as displayed in **Figure 8**. Verify the receipt number and click the "Unfinalize Sales Receipts" button.
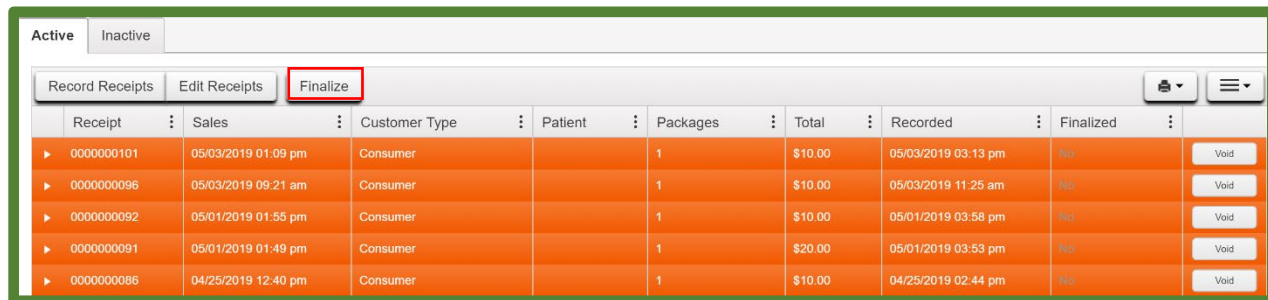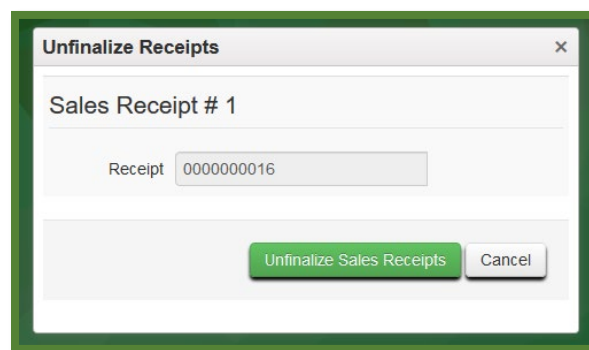

Figure 8: Unfinalize Sales Receipt

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. This is shown in **Figure 9**.
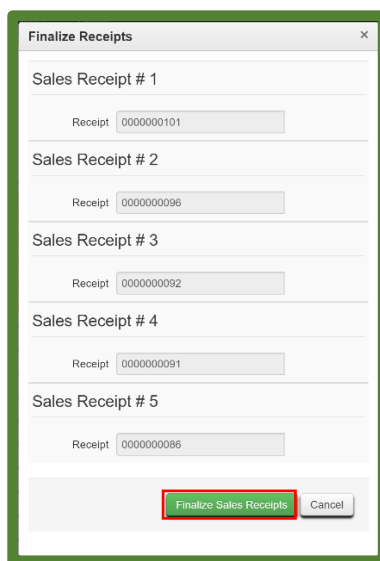

Figure 9: Highlight Multiple Receipts for Finalization

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, as shown in **Figure 10** below, where the industry user will confirm the receipt to finalize and select the "Finalize Sales Receipts" button to complete the finalization.

Figure 10: Finalize Multiple Sales Receipts

IV.   Sales Deliveries API Impact

If a Dispensary plans to report sales deliveries through their Point-of-Sale (POS) system, please note the sales delivery manifest can only be printed within your Metrc account. **The Metrc API will allow for the creation/reporting of sales deliveries,** but Dispensaries should ensure the following:

- Confirm with your POS provider that sales deliveries are being reported into Metrc as deliveries and not receipts.

- Log into Metrc prior to departure and print out the Metrc Sales Delivery manifest.

- Do not create both a sales delivery in Metrc manually and in your POS system separately as you will likely be recording the transaction twice.

If your POS system does not currently differentiate between sales deliveries and receipts, your sales data may be reported inaccurately. Metrc provides documentation here for integrators to reference the new available endpoints for the sales section.

The new endpoints that will be available for POS systems to utilize the sales delivery section of the Metrc API are outlined below.

- POST /sales/v1/deliveries
- PUT /sales/v1/deliveries
- PUT /sales/v1/deliveries/complete
- DELETE /sales/v1/delivery/{id}

V.   Metrc – Industry Training

Metrc provides industry training and education workshops in person and online, as well as training guides and videos available online 24/7 x 365.

- Register for workshops or classes online at: **https://www.metrc.com/nevada.**
- You must attend at least one New Business (Level 1) class online before you may register for other classes.
- We recommend that all industry users take classes every 3-4 months to stay updated on new features or changes.

Online classes available:

- Metrc New Business (Level 1) – All Facilities
- Metrc Advanced (Level 2) – Cultivators
- Metrc Advanced (Level 2) – Producers
- Metrc Advanced (Level 2) – Stores/Dispensaries
- Metrc Advanced (Level 2) – Testing Labs (not available via scheduler)

Metrc Support Bulletin

Metrc – Industry Support

Metrc provides live interactive support for industry users and licensees. Support contact information can be found on our website, when logged into Metrc under your Support area, and is listed below.

Check under the "Support" area for additional resources.
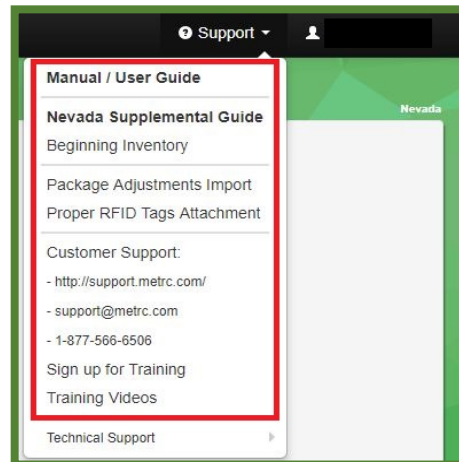
Please be advised that the new *CSV Formatting Guide and Industry Reports Guide* are now located under the Support area when you log in to Metrc.

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