

Bulletin Number: AK_IB_58_Auto-Finalization of Packages and Sales Receipts	Distribution Date: 12/15/2023	Effective Date: 12/27/2023
Contact Point: Metrc Support	Subject: Auto-Finalization of Packages and Sales Receipts	
Reason: To provide an overview of a new feature to automatically finish packages and finalize sales receipts		

Greetings,

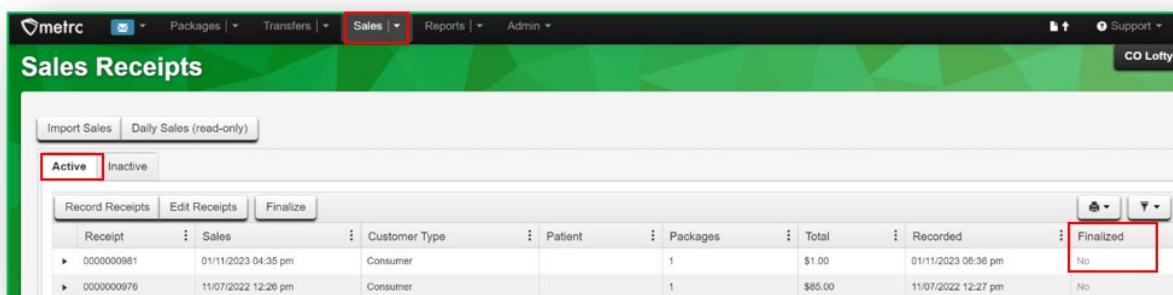
Metrc is pleased to provide information on the latest functionality update that will be available on 12/27/2023, which includes:

- Auto-finalization of active sales receipts after (7) days since the sale was last edited.
- Auto-finishing of active zero quantity packages after (30) days since the package was last edited.

Please read on for more information regarding the new functionality.

Auto-Finalization of Active Sales Receipts

Previously, retail dispensary Administrators were required to finalize sales receipts in Metrc manually. **Figure 1** below demonstrates an example in which a sales receipt is ready for finalization, which is identified in the 'Finalized' column.



Sales Receipts							
Import Sales		Daily Sales (read-only)					
Active		Inactive					
Record Receipts		Edit Receipts		Finalize			
Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized
▶ 000000981	01/11/2023 04:35 pm	Consumer		1	\$1.00	01/11/2023 06:36 pm	No
▶ 000000976	11/07/2022 12:26 pm	Consumer		1	\$85.00	11/07/2022 12:27 pm	No

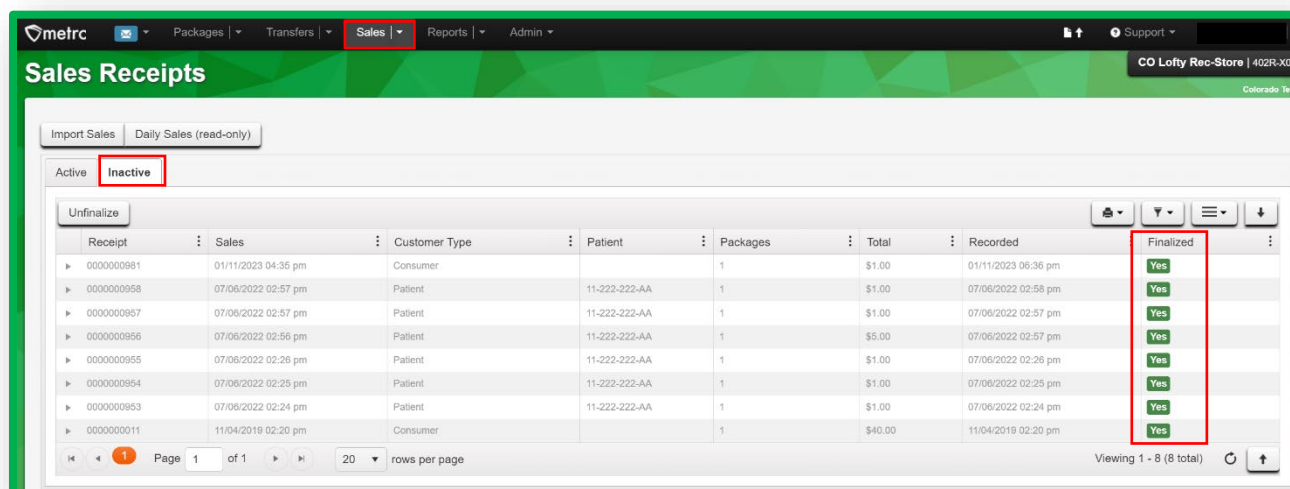
Figure 1: Previous Sales Receipts Grid

Effective 12/27/2023, new auto-finalization functionality will automate active sales receipt finalization for any sales receipt that has been reported and no edits within the last seven days.

To locate all applicable auto-finalized sales receipts, the following steps should be followed:

1. Select the Sales dropdown on the navigational toolbar
2. Select Receipts option
3. Click on the 'Inactive' tab

The sales receipts within the 'Finalized' column display "Yes" now that they are finalized and inactive. In addition, the Sales Receipt grid will identify the receipt number, time/date of sale, customer type, patient number, number of packages that were sold from, sales total, and date/time the sale was recorded in Metrc – **see Figure 2.**

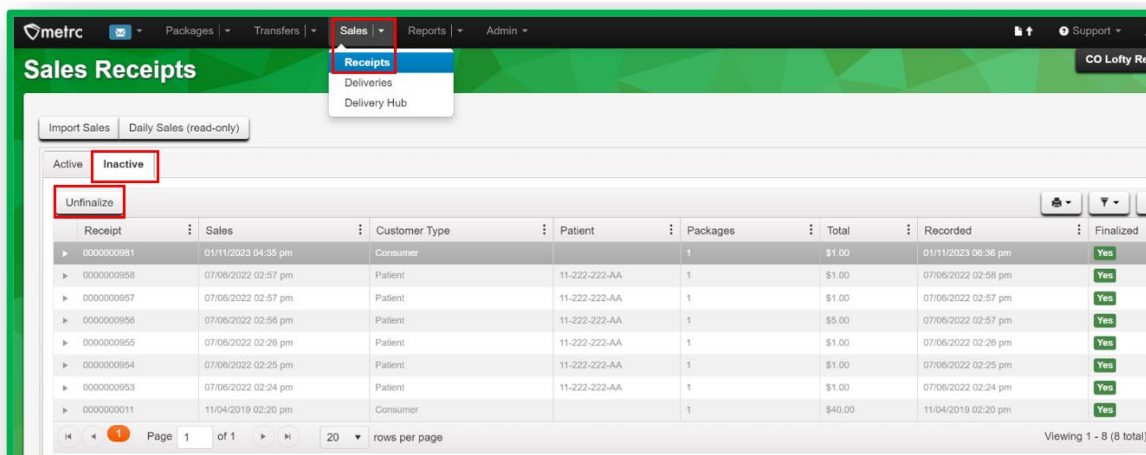


Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized
0000000981	01/11/2023 04:35 pm	Consumer		1	\$1.00	01/11/2023 06:36 pm	Yes
0000000958	07/06/2022 02:57 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:58 pm	Yes
0000000957	07/06/2022 02:57 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:57 pm	Yes
0000000956	07/06/2022 02:56 pm	Patient	11-222-222-AA	1	\$5.00	07/06/2022 02:57 pm	Yes
0000000955	07/06/2022 02:26 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:26 pm	Yes
0000000954	07/06/2022 02:25 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:25 pm	Yes
0000000953	07/06/2022 02:24 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:24 pm	Yes
0000000011	11/04/2019 02:20 pm	Consumer		1	\$40.00	11/04/2019 02:20 pm	Yes

Figure 2: Auto-finalized Sales Receipts in the Inactive Sales Receipts tab

If a finalized inactive sales receipt needs to be unfinalized, the following steps should be followed to unfinalize – **see Figure 3**.

1. Select the Sales dropdown on the navigational toolbar
2. Select Receipts option
3. Click on the 'Inactive' tab
4. Select the respective receipt(s) that need to be unfinalized
5. Click the 'Unfinalize' button



Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized
0000000981	01/11/2023 04:35 pm	Consumer		1	\$1.00	01/11/2023 06:36 pm	Yes
0000000958	07/06/2022 02:57 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:58 pm	Yes
0000000957	07/06/2022 02:57 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:57 pm	Yes
0000000956	07/06/2022 02:56 pm	Patient	11-222-222-AA	1	\$5.00	07/06/2022 02:57 pm	Yes
0000000955	07/06/2022 02:26 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:26 pm	Yes
0000000954	07/06/2022 02:25 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:25 pm	Yes
0000000953	07/06/2022 02:24 pm	Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:24 pm	Yes
0000000011	11/04/2019 02:20 pm	Consumer		1	\$40.00	11/04/2019 02:20 pm	Yes

Figure 3: Unfinalizing an Inactive Finalized Sales Receipt

After an inactive sales receipt is unfinalized, the respective sales receipt will move back to the 'Active' tab as demonstrated in **Figure 4**.

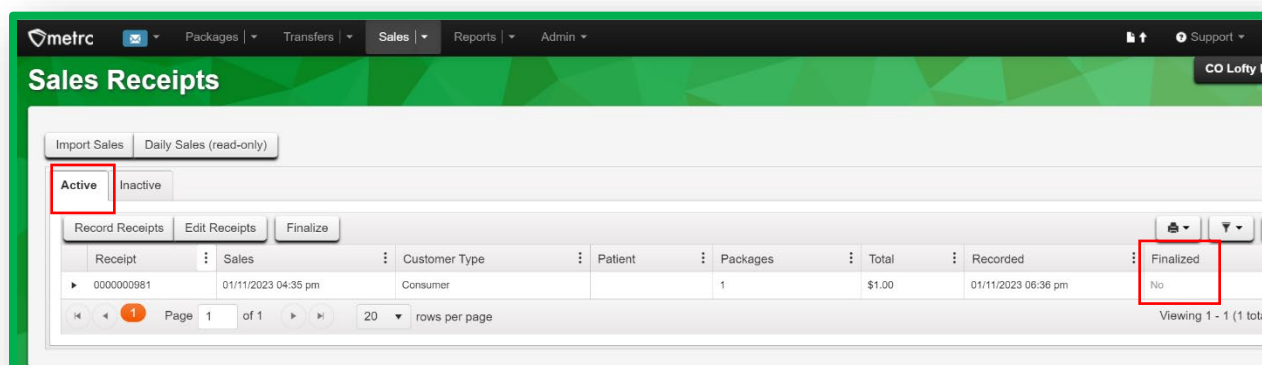


Figure 4: Unfinalizing Receipts – Active tab confirmation

Auto-Finishing of Active Zero Quantity Packages

Auto-finishing active packages is similar to the process of auto-finalizing active sales receipts.

Effective 12/27/2023, new functionality will automate the finishing of active zero quantity packages that have not had any updates to the package within the last thirty days.

To locate all applicable active zero quantity packages, the following steps should be followed:

1. Select the Packages dropdown in the navigational toolbar
2. Click on the 'Active' tab
3. Scroll to the 'Quantity' column to view the package shows as zero (To see all packages showing zero, select the word "Quantity" at the top of the Quantity column in the active Packages grid.)

Figure 5 below demonstrates an example in which a package has zero inventory but is still listed as an active package in Metrc. The new functionality will auto-finish these packages and remove the manual work of doing so for each package.

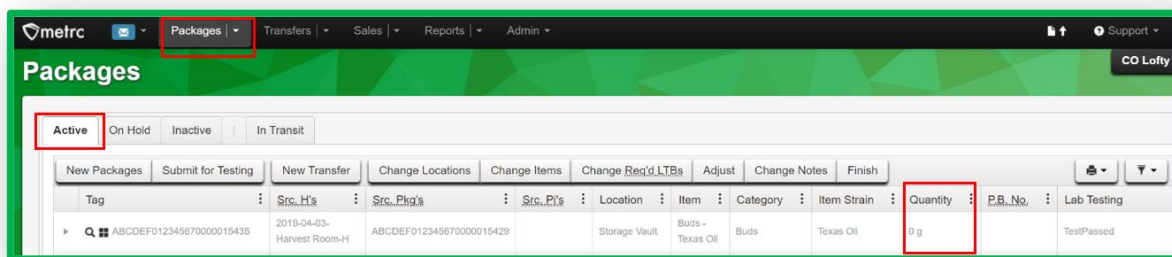


Figure 5: Active Packages Grid

With the deployment of the auto-finishing functionality, all applicable finished packages will be located in Packages grid > Inactive tab where packages within the 'Finished' column display "Yes" that have been finished and inactive – **see Figure 6**.

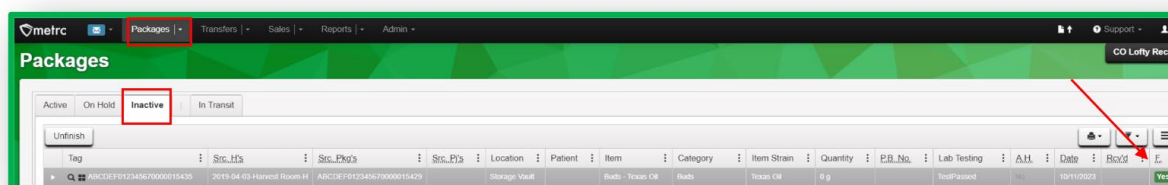


Figure 6: Inactive Packages Tab

If a situation arises where a finished inactive zero quantity package needs to be unfinished, the following steps should be followed to unfinish:

1. Select the Packages dropdown in the navigational toolbar
2. Click on the 'Inactive' tab
3. Select the respective package(s) that need to be unfinished
4. Click the 'Unfinish' button

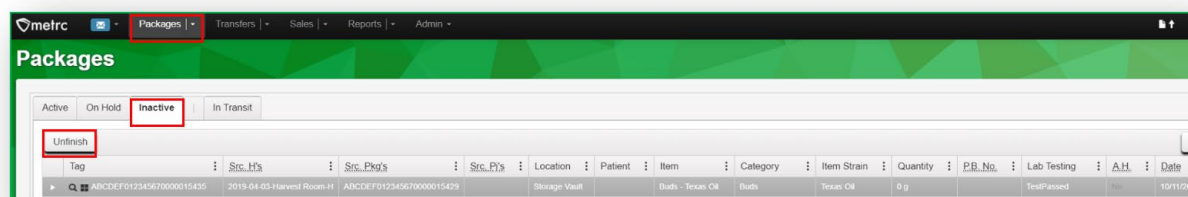


Figure 7: Unfinishing Packages

After a package is unfinished, the respective package(s) will move back to the 'Active' tab – see Figure 8.

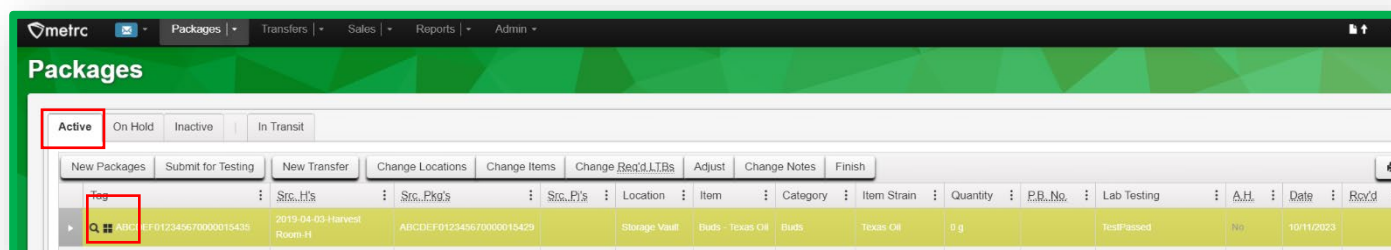


Figure 8: Unfinishing Packages - Active tab confirmation

Metrc Resources

If you have any questions, or need additional support:

Contact Metrc Support: Log into the Metrc Support Portal to open a case or live chat a customer support representative: [Support.Metrc.com](https://support.metrc.com), Email Support@metrc.com or call 877-566-6506

Metrc Learn: Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options based on experience level. In addition, the learning system is organized into facility-specific programs made up of various courses. To login, visit [Metrc Learn](#) and enter your login credentials, or to access, register by visiting the [Metrc Learn Registration](#).

Access additional resources: In the Metrc system, click on the "Support" dropdown in the top-right navigational toolbar and select the appropriate resource, including educational guides and more.

Thank you for your continued partnership.