

Bulletin Number:	Distribution Date:	Effective Date:
CO_IB_12.15.23_Auto-	12/15/2023	12/27/2023
Finalization of Packages		
and Sales Receipts		
Contact Point:	Subject: Auto-Finalization	of Packages and Sales
Metrc Support	Receipts	-
Reason: To provide an overv	iew of a new feature to autor	matically 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, Store 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.

		100000					×.								
ales	s Rece	ipts	;												CO Lo
Import	t Sales Daily	Sales (read-only)												
Activ	e Inactive	1													
Activ	re Inactive	544	Capacinte Eignlize												
Activ	e Inactive	Edit	Receipts Finalize		Customer Type		Patient	:	Packages	1	Total	:	Recorded	:	Finalized
Activ	e Inactive cord Receipts Receipt 0000000981	Edit i	Receipts Finalize Sales 01/11/2023 04:35 pm	:	Customer Type Consumer	1	Patient	1	Packages	÷	Total \$1.00	:	Recorded 01/11/2023 06:36 pm	:	Finalized

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 have been reported and did not contain editions within seven days of reporting the sale.

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

- 1. Select the Sales dropdown in the navigational panel
- 2. Select Receipts options
- 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 the packages that were sold from, sales total, and date/time the sale was recorded in Metrc – **see Figure 2**.

(2)
(H)

	'c 🔤 *	Packag	es 👻 Transfer <mark>s 👻</mark>	Sales	▼ Reports ▼	Admin 👻						🖹 🕈 🛛 🧿 Suppor	v0101
le	s Recei	nts										CO Lofty Re	c-Store 402R-X
	JILCOUL	pto								-		and the second second	Colorado Te
Impor	rt Sales Daily S	Sales (rea	ad-only)										
Activ	/e Inactive												
1												(- 11 - 1
U	nfinalize												<u> </u>
	Receipt	:	Sales	:	Customer Type	:	Patient	Packages	:	Total	: Recorded	: Finalized	:
э.	000000981		01/11/2023 04:35 pm		Consumer			1		\$1.00	01/11/2023 06:36 pr	om Yes	
	000000059											1 13 20	
P.	000000956		07/06/2022 02:57 pm		Patient		11-222-222-AA	1		\$1.00	07/06/2022 02:58 pt	om Yes	
-	0000000957		07/06/2022 02:57 pm 07/06/2022 02:57 pm		Patient Patient		11-222-222-AA 11-222-222-AA	1		\$1.00	07/06/2022 02:58 pt 07/06/2022 02:57 pt	om Yes	
A A A	0000000957 0000000956		07/06/2022 02:57 pm 07/06/2022 02:57 pm 07/06/2022 02:56 pm		Patient Patient Patient		11-222-222-AA 11-222-222-AA 11-222-222-AA	1		\$1.00 \$1.00 \$5.00	07/06/2022 02:58 pi 07/06/2022 02:57 pi 07/06/2022 02:57 pi	om Yes om Yes	
A A A	0000000957 0000000956 0000000955		07/06/2022 02:57 pm 07/06/2022 02:57 pm 07/06/2022 02:56 pm 07/06/2022 02:26 pm		Patient Patient Patient Patient		11-222-222-AA 11-222-222-AA 11-222-222-AA 11-222-222-AA	1 1 1 1		\$1.00 \$1.00 \$5.00 \$1.00	07/06/2022 02:58 pi 07/06/2022 02:57 pi 07/06/2022 02:57 pi 07/06/2022 02:57 pi	om Yes om Yes om Yes	
4 4 4 A	000000957 000000956 000000955 000000954		07/06/2022 02:57 pm 07/06/2022 02:57 pm 07/06/2022 02:56 pm 07/06/2022 02:26 pm 07/06/2022 02:25 pm		Patient Patient Patient Patient Patient		11-222-222-AA 11-222-222-AA 11-222-222-AA 11-222-222-AA 11-222-222-AA	1 1 1 1 1		\$1.00 \$1.00 \$5.00 \$1.00 \$1.00	07/06/2022 02:58 pi 07/06/2022 02:57 pi 07/06/2022 02:57 pi 07/06/2022 02:26 pi 07/06/2022 02:25 pi	om Yes om Yes om Yes om Yes	
A A A A A	0000000957 0000000956 0000000955 0000000954 0000000953		07/06/2022 02:57 pm 07/06/2022 02:57 pm 07/06/2022 02:56 pm 07/06/2022 02:26 pm 07/06/2022 02:25 pm 07/06/2022 02:24 pm		Patient Patient Patient Patient Patient Patient Patient		11-222-222-AA 11-222-222-AA 11-222-222-AA 11-222-222-AA 11-222-222-AA 11-222-222-AA	(1) (1) (1) (1) (1) (1) (1) (1)		\$1.00 \$1.00 \$5.00 \$1.00 \$1.00 \$1.00	07/06/2022 02:58 pi 07/06/2022 02:57 pi 07/06/2022 02:57 pi 07/06/2022 02:26 pi 07/06/2022 02:26 pi 07/06/2022 02:25 pi	om Yes om Yes om Yes om Yes om 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 in the navigational panel
- 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

le	s Receip	ots		Rece Deliv Deliv	eries ery Hub						X				SO Eorly
mpo	rt Sales Daily Sa	iles (re	ead-only)												
Activ	ve Inactive														
U	nfinalize													A-	-
-	Receipt	:	Sales	;	Customer Type	:	Patient	:	Packages	:	Total	:	Recorded		Finalize
	000000981		01/11/2023 04:35 pm		Consumer						\$1.00		01/11/2023 06:36 pm		Yes
×.	000000958		07/06/2022 02:57 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:58 pm		Yes
×	000000957		07/06/2022 02:57 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:57 pm		Yes
Þ	000000956		07/06/2022 02:58 pm		Patient		11-222-222-AA		1		\$5.00		07/06/2022 02:57 pm		Yes
ь.	000000955		07/06/2022 02:26 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:26 pm		Yes
×	000000954		07/06/2022 02:25 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:25 pm		Yes
Þ	000000953		07/06/2022 02:24 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:24 pm		Yes
Þ	000000011		11/04/2019 02:20 pm		Consumer				1		\$40.00		11/04/2019 02:20 pm		Yes
H	Page	e 1	of 1 + H 20		rows per page									Viewing	1 - 8 (8 tr

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**.

netrc 💌 - Pa	ackages •	Transfers 🕶	Sales •	Reports 🕶 Adri									61	 Support -
ales Receip	ts		1				Ł							CO Lofty F
Import Sales Daily Sale	is (read-only)	J												
Active Inactive														
Record Receipts Ec	lit Receipts	Finalize												
Receipt	: Sales		: Custo	omer Type	:	Patient	:	Packages	:	Total	:	Recorded	:	Finalized
 000000981 	01/11/2023	3 04:35 pm	Consur	mer				1		\$1.00		01/11/2023 06:36 pm		No
R R Page	1 of 1	() ()	20 v row	vs per page										Viewing 1 - 1 (1 tota
					_									

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 past 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(s) shown 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.

ackages										Y		~		CO Lot
Active On Hold Inactive	In	Transit												
New Packages Submit for Test	ing]	New Transfer	Change Locations Cha	inge Items		hange <u>Req'd LT</u>	Bs Adju	st Change	Notes	Finish				
Тад	:	Src. H's	Src. Pkg's	Src. Pi	ş i	Location :	Item :	Category	: Iten	Strain :	Quantity	P.B. No.	1.0	Lab Testing
ABCDEF0123456700000154	35	2019-04-03-	ABCDEF012345670000015425			Storage Vault	Buds -	Buds	Теха	s Oil	0 g		- 1	festPassed

Figure 5: Active Packages Grid

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

ackages											1			CO Lofty Re
Active On Hold Inactive	In Transit													
													L A	
Tag	: Src. H's	Stc. Pkg's	SrcPi's	Location	Patient :	Item :	Category	: Item Strain	Quantity	. P.B. No.	: Lab Testing	: AH	I Date I	Bovid E.





If 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 panel
- 2. Click on the 'Inactive' tab
- 3. Select the respective package(s) that need to be unfinished
- 4. Click the 'Unfinish' button

ckages													
Active On Hold Inactive	In Transit												
	in manak												(
Unfinish Tag	I Src. H's	Src. Pkg's	Stc. Pi's :	Location :	Patient :	Item :	Category	Item Strain	Quantity	: <u>P.B. No.</u>	Lab Testing	: At	1. i Date

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: <u>Support.Metrc.com</u>, Email <u>Support@metrc.com</u> 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 <u>Metrc Learn</u> and enter your login credentials, or to access, register by visiting the <u>Metrc Learn Registration</u>.

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

Thank you for your continued partnership.