Metrc Support Bulletin

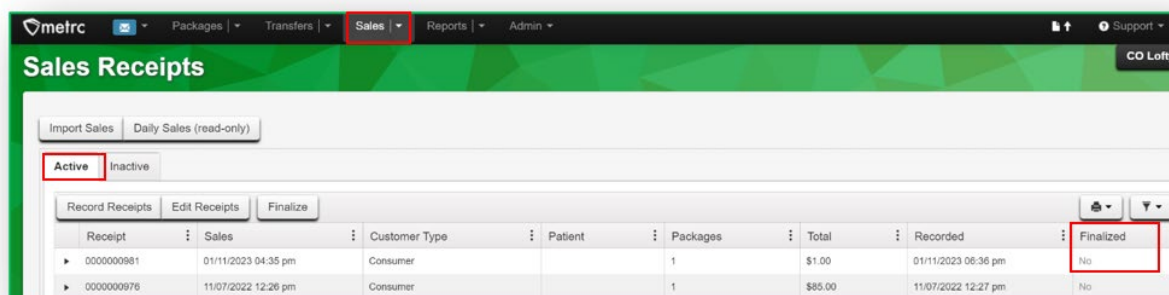| Bulletin Number: MA_IB_0074	Distribution Date: 12/15/2023	Effective Date: 12/27/2023
Contact Point: Metrc Support	Subject: Auto-Finalization of Packages and Sales Receipts	
Reason: Provide industry users of a new feature to automatically finish packages and finalize sales receipts		

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 new functionality.

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![metrc logo]

Auto-Finalization of Active Sales Receipts

Previously, retail or 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.
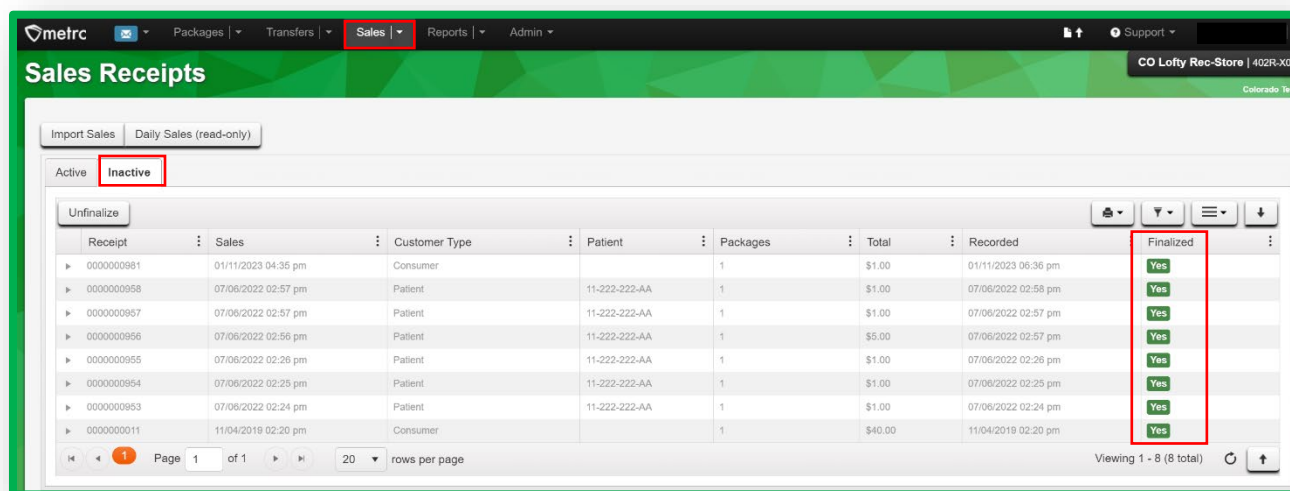

Figure 1: Previous Sales Receipts Grid

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 in the navigational toolbar
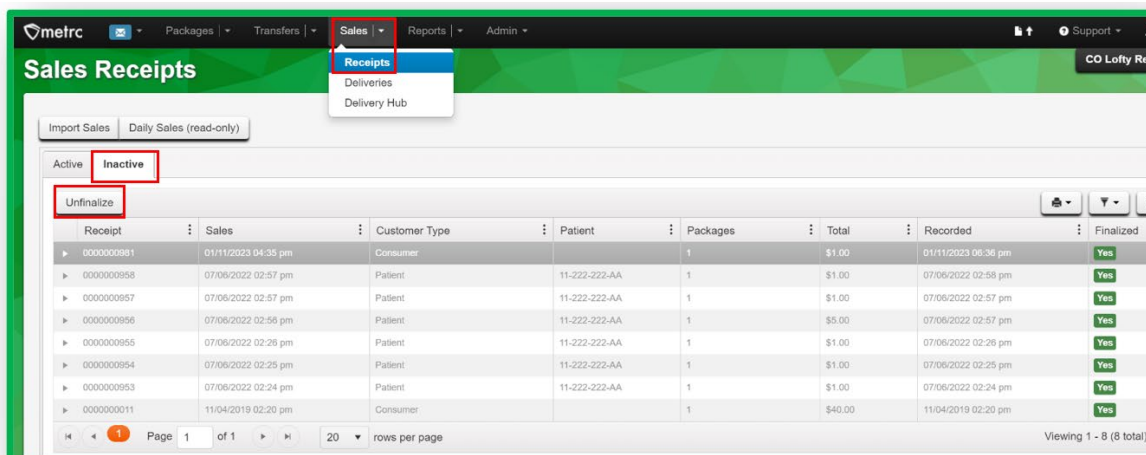2. Select Receipts option
3. Click on the 'Inactive' tab

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.**

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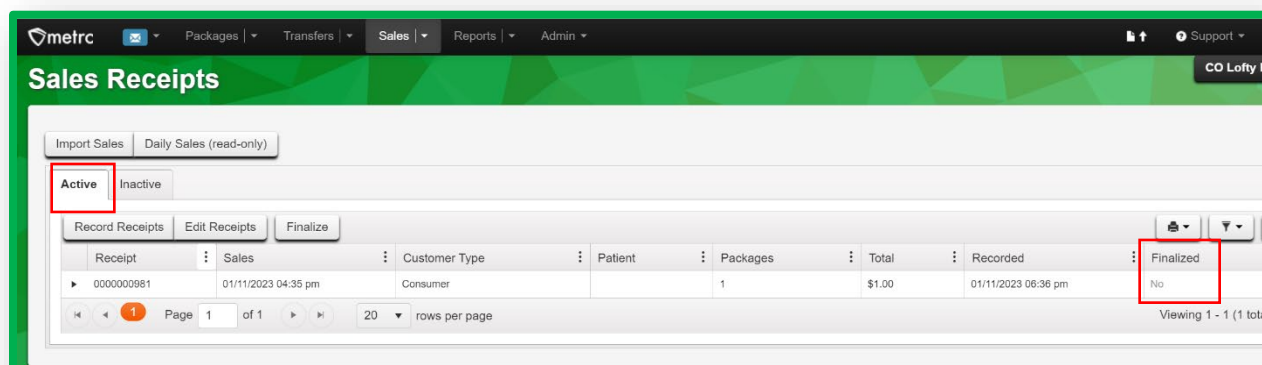**Figure 2: Auto-finalized Sales Receipts in the Inactive Sales Receipts tab**

If a situation arises where 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 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

Figure 3: Unfinalizing an Inactive Finalized Sales Receipt

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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

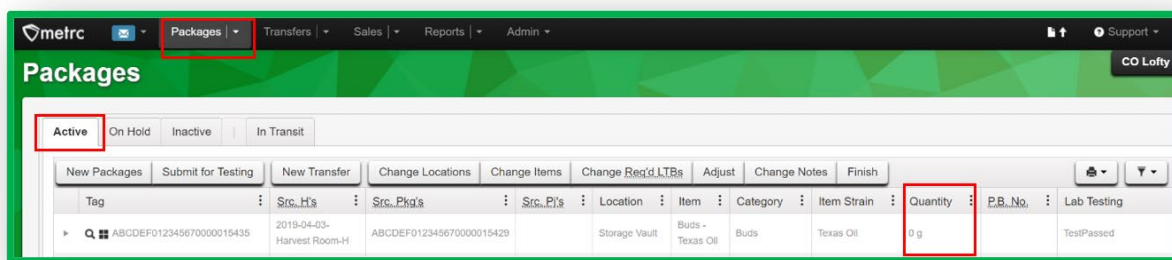# Auto-Finishing of Active Zero Quantity Packages

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

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

To locate all applicable auto-finished active zero quantity packages, the following steps should be followed:
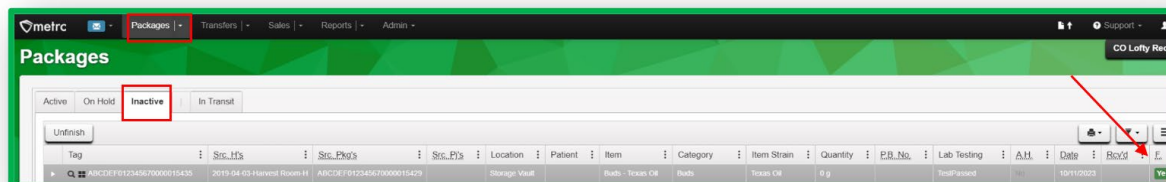
1. Select the Packages dropdown in the navigational toolbar
2. Click on the 'Active' tab
3. Scroll to the 'Quantity' column to view the package shows as zero (To see all packages showing zero, select the word "Quantity" at the top of the Quantity column in the active Packages grid.)

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.
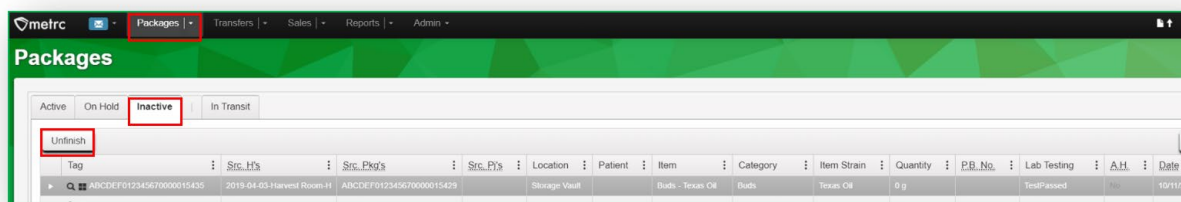

Figure 5: Active Packages Grid

With the deployment of the auto-finishing functionality, all applicable finished packages 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.**

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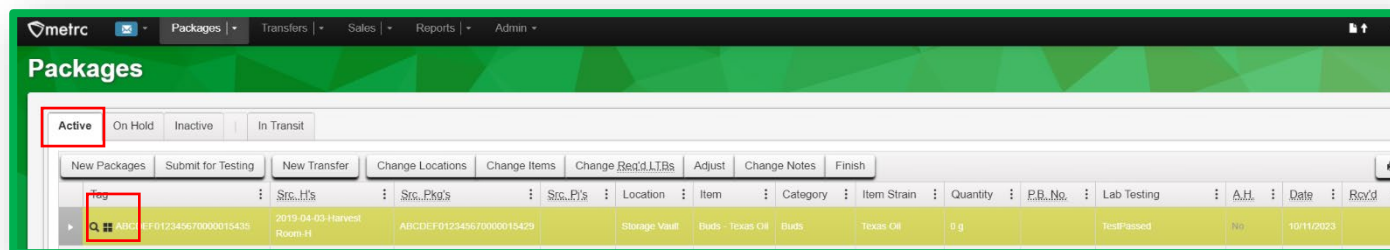
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Figure 6: Inactive Packages Tab

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

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 unfinalized
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

Thank you for your continued partnership. Please contact Metrc Support with questions.

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