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 Receipts	of Packages and Sales
Reason: Provide industry use finalize sales receipts	ers of a new feature to autom	natically finish packages and

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.



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.

	Packages 👻 Transfers		ales - Reports -	Admir								B 1	Support - CO Loft
ales Receip	ots												COLON
Import Sales Daily Sa	les (read-only)												
Active Inactive	les (read-only)												
Active	Edit Receipts Finalize												A- 7-
Active		:	Customer Type	:	Patient	1	Packages	1	Total	:	Recorded	: 7	⊜ • ▼ • Finalized
Active Inactive Record Receipts I	Edit Receipts Finalize		Customer Type Consumer	1	Patient	1	Packages 1	i	Total \$1.00	i	Recorded 01/11/2023 06:36 pm		

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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Impo	rt Sales Daily Sale	s (re	ad-only)							
Activ	ve Inactive									
U	nfinalize									· ▼ • ≡ • +
_	Receipt	:	Sales	:	Customer Type :	Patient :	Packages	Total	Recorded	Finalized :
	000000981		01/11/2023 04:35 pm		Consumer		(A)	\$1.00	01/11/2023 06:36 pm	Yes
Þ	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 02:56 pm		Patient	11-222-222-AA	4	\$5.00	07/06/2022 02:57 pm	Yes
×.	000000955		07/06/2022 02:26 pm		Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:26 pm	Yes
Þ	000000954		07/06/2022 02:25 pm		Patient	11-222-222-AA	1	\$1.00	07/06/2022 02:25 pm	Yes
•	000000953		07/06/2022 02:24 pm		Patient	11-222-222-AA	4	\$1.00	07/06/2022 02:24 pm	Yes
Ŀ.	000000011		11/04/2019 02:20 pm		Consumer		1	\$40.00	11/04/2019 02:20 pm	Yes
H	Page	1	of 1 + + 20		rows per page				View	ing 1 - 8 (8 total) 💍 🕇

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

Import Sales	eipts	De	alivery Hub									CO Lofty F
Active Inactiv	_											
Unfinalize Receipt	:	Sales	Customer Type	:	Patient	:	Packages	:	Total	;	Recorded	Finalized
D000000981												Yes
▶ 0000000958		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
► 000000956		07/06/2022 02:56 pm	Patient		11-222-222-AA		1		\$5.00		07/06/2022 02:57 pm	Yes
▶ 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
▶ 000000953		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

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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**.

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les R	Receij	ots														CO Loft
mport Sales	s Daily S	ales (r	ad-only)	ļ												
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Rece	eipt		Sales		:	Customer Type	:	Patient	:	Packages	:	Total	:	Recorded	Fi	nalized
▶ 00000	000981		01/11/2023	04:35 pm		Consumer				1		\$1.00		01/11/2023 06:36 pm	No	
	1 Pag	e 1	of 1	F H	20	 rows per page 									,	√iewing 1 - 1 (1 t

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.

acl	kages									CO Lo
Act	ive On Hold Inactive I In	Transit								
N	lew Packages Submit for Testing	New Transfer	Change Locations Char	nge Items	Change Reg'd L1	Bs Adjust	Change Notes	Finish	<u></u>	- T-
	Tag	Src. H's	Src. Pkg's	Src. Pi's	Location	Item : C	Category : Item S	Strain : Quantity	P.B. No. :	Lab Testing
		2019-04-03-	ABCDEF012345670000015429		Storage Vault	Buds - Texas Oll B	luds Texas			TestPassed

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																	CO Lofty Rec-
Active On Hold	Inactive	In Transit														/	
Unfinish																0	
Tag		Src. H's	:	Stc. Pkg's	:	SrcPi's	: Location	Patient	Item :	Category	E Item Strain	: Quantity	: <u>P.B. N</u>	Lab Testing	: AH.	: Date :	Bovid 🕈 E.
N O MARCOLETO																	Yes

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

ickages													
Active On Hold Inactive	In Transit												
Listeish													1
Unfinish	: Src. H's	: Src. Pkg's	: Src. Pi's	Location	Patient	Item :	Category	Item Strain	Quantity	<u>P.B. No.</u>	: Lab Testing	i <u>A.H.</u> 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**.

acl	ages														
Acti	ve On Hold	I Inactive Ir	n Transit												
N	ew Packages	Submit for Testing	New Transfer	Change Locations	Change Item	s Change	e Regid LTBs	Adjust Chan	e Notes Fin	ish					
_	Tag	1	Src. H's	: Src. Pkg's	: 5	SrcPi's	Location :	Item :	Category :	Item Strain	Quantity :	P.B. No.	Lab Testing	i A.H.	: Date : Rcv

Figure 8: Unfinishing Packages - Active tab confirmation

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