Metrc Support Bulletin



Bulletin Number:	Distribution Date:	Effective Date:
SD_IB_16 Auto Finalization	12/11/2023	12/27/2023
Packages & Sales Receipts		
Contact Point:	Subject: Auto-Finalization	of Packages and Sales
Metrc Support	Receipts	
Reason: Provide industry use	ers of a new feature to autom	natically 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.



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.

ales F	Recei	pts													CO Lo
Import Sale	s Daily S	ales (re	ead-only)												
Active	Inactive Receipts	Edit R	eceipts												A. Y.
Active Record	Inactive Receipts	Edit R	eceipts Finalize	:	Customer Type	1	Patient	1	Packages	:	Total	1	Recorded	:	€ • Finalized
Active Record Rec	Inactive Receipts	Edit R	Sales	i	Customer Type Consumer	I	Patient	1	Packages	I	Total \$1.00	i	Recorded 01/11/2023 06:36 pm	: 7	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 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 sold, sales total, and date/time the sale was recorded in Metrc – **see Figure 2.**



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Activ	e Inactive													
Ur	nfinalize												e•][▼•][≡	•][+
	Receipt	:	Sales	:	Customer Type	:	Patient	:	Packages	:	Total	Recorded	Finalized	
Þ.	000000981		01/11/2023 04:35 pm		Consumer				1		\$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	
ř.	0000000957		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		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	
F.	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	
14	Page	1	of 1 + + 2	• 0	rows per page							V	iewing 1 - 8 (8 total)	0 +
													5 ()	Ŭ L

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

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Activ	e Inactive														
U	nfinalize													<u>.</u>	v -)
	Receipt	:	Sales	:	Customer Type	:	Patient	:	Packages	:	Total	:	Recorded	: F	inalized
×	000000981		01/11/2023 04:35 pm		Consumer						\$1.00		01/11/2023 06:36 pm	6	'es
\mathbb{P}	000000958		07/06/2022 02:57 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:58 pm		/es
	000000957		07/06/2022 02:57 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:57 pm	6	fes
Þ	000000956		07/06/2022 02:56 pm		Patient		11-222-222-AA		1		\$5.00		07/06/2022 02:57 pm	6	fes
Þ.	000000955		07/06/2022 02:26 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:26 pm	6	fes
- Þ.:	000000954		07/06/2022 02:25 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:25 pm	1	fes
÷.	000000953		07/06/2022 02:24 pm		Patient		11-222-222-AA		1		\$1.00		07/06/2022 02:24 pm		fes
	000000011		11/04/2019 02-20 pm		Consumer				1		\$40.00		11/04/2019 02:20 pm		Vos

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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Record	Receipts	Edit F	eceipts	Finalize												
Rec	eipt	1	Sales		:	Customer Type	:	Patient	:	Packages	:	Total	:	Recorded	Fi	nalized
▶ 0000	000981		01/11/2023	04:35 pm		Consumer				1		\$1.00		01/11/2023 06:36 pm	No	2
	1 Pa	ge 1	of 1	(F) (H)	20	 rows per page 										Viewing 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.

ackage	s										CO Lo
Active	Hold Inactive In	Transit									
New Pack	ges Submit for Testing	New Transfer	Change Locations C	hange Items	Change Regid LT	Bs Adjust	Change Note	es Finish	_		A- Y-
Tag	1	Src. H's	Src. Pkg's	: Src. Pi's	Location	Item :	Category :	Item Strain	Quantity	P.B. No.	Lab Testing
▶ Q H A	CDEF012345670000015435	2019-04-03-	ABCDEF0123456700000154	29	Storage Vault	Buds -	Buds	Texas Oli	0 g		TestPassed

Figure 5: Active Packages Grid

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



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Active On Hold In	nactive Ir	n Transit													
Unfinish															<u>.</u>
Tag	:	Src. H's	Stc. Pkg's	Sr.cPi's	: Location	Patient :	Item :	Category	Item Strain	Quantity	P.B. No. :	Lab Testing	: A.H.	i Date i Boys	1 🖡 E
															Y

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												
													1
Unfinish	i Src. H's	Src. Pkg's	Src. Pi's	Location	Patient	Item :	Category	Item Strain	Quantity :	P.B. No.	Lab Testing	i <u>A.H.</u>	Date

Figure 7: Unfinishing Packages

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

ackages								
Active On Hold Inactive	In Transit							
Francisco I construction	New Transfer II C	hange Locations Change Ite	ems Change Regid	LT.Bs Adjust Ch	ange Notes Finish			
New Packages Submit for Testing								
New Packages Submit for Testing	Src.H's	SrcPkg's	StcPi's : Loca	tion : Item	: Category : Item Strain	Quantity : P.B. No.	Lab Testing	A.H. I Date I Roy

Figure 8: Unfinishing Packages - Active tab confirmation

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