

Bulletin Number: RI_IB_0020	Distribution Date: 01/03/2024	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Sales Receipts vs. Sales deliveries and Sales Delivery Hub	
Reason: Providing guidance on sales receipts, sales deliveries, and sales delivery hub functionality		

Greetings,

This bulletin is intended to provide clarity regarding the processes of reporting Sales Receipts, Sales Deliveries, and new functionality for the Sales Delivery Hub.

Please read on for important information and key differences in functionality.

Sales Receipts vs. Sales Deliveries & Sales Delivery Hub

A Sales Delivery (off-premise sale) and a Sales Receipt (in-store sale) are two separate actions that should be reported differently in Metrc. The key differences are:

- Any transaction that takes place on the licensed premises is reported as a **Sales Receipt** vs. any transaction that takes place off the licensed premises is reported as a **Sales Delivery**.
- The **Sales Delivery Hub** provides functionality that adds visibility, flexibility, and a better user experience for licensees transporting sales deliveries.

Note: A sales receipt and a sales delivery should never be reported for the same transaction.

Employees who require access to sales to report relevant sales activity must be granted appropriate permission to complete the related functions. These permissions can only be granted by a Metrc Admin.

- To grant permission, go to the Admin area in the Navigational Toolbar and select the Employees option in the drop down to go to the Employees grid – **see Figure 1.**

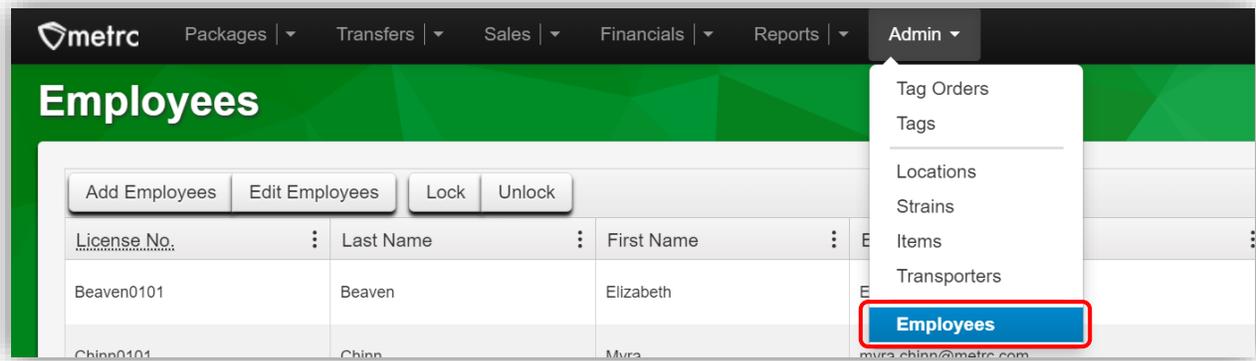


Figure 1: Employees grid in the Admin area dropdown

- Highlight the Employee that needs to be granted permission and click on the Edit Employees button to access the Edit Employees action window – **see Figure 2.**

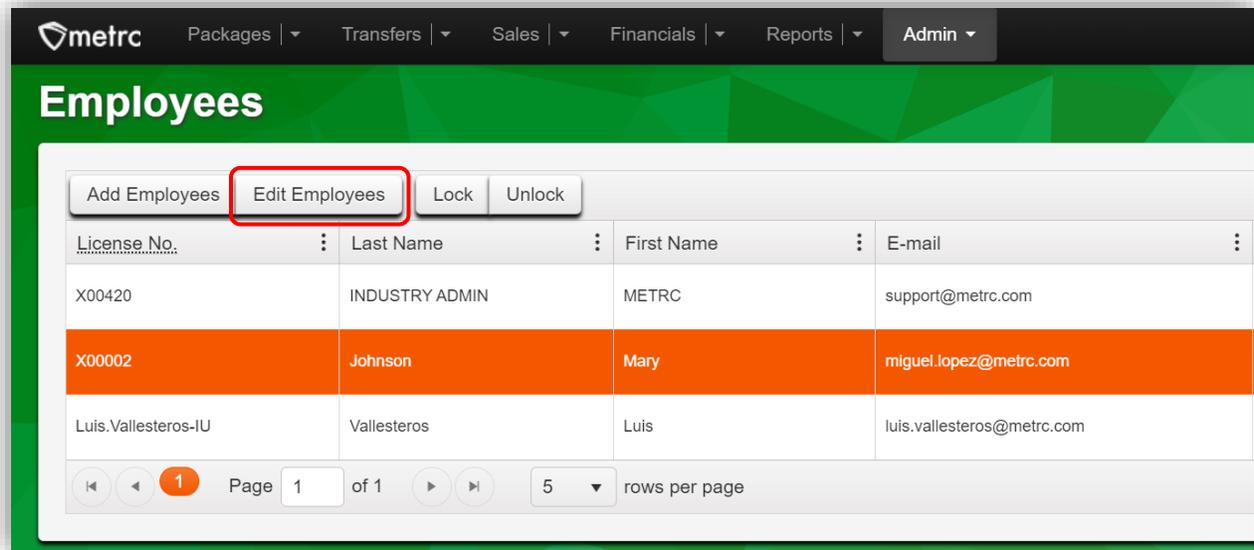


Figure 2: Edit Employees button in the Employees grid

- Locate the Sales Menu section in the Edit Employees action window. The three permissions are explained below. Check the Manage box to the right of each permission that the user is being granted access to for the related function – **see Figure 3** below.
 - **Sales** – grants access to the Receipts grid and permission to manage.
 - **Sales Delivery** – grants access to Sales Deliveries grid and permission to manage.
 - **Hub** – grants permission to the Sales Delivery Hub and permission to manage it.

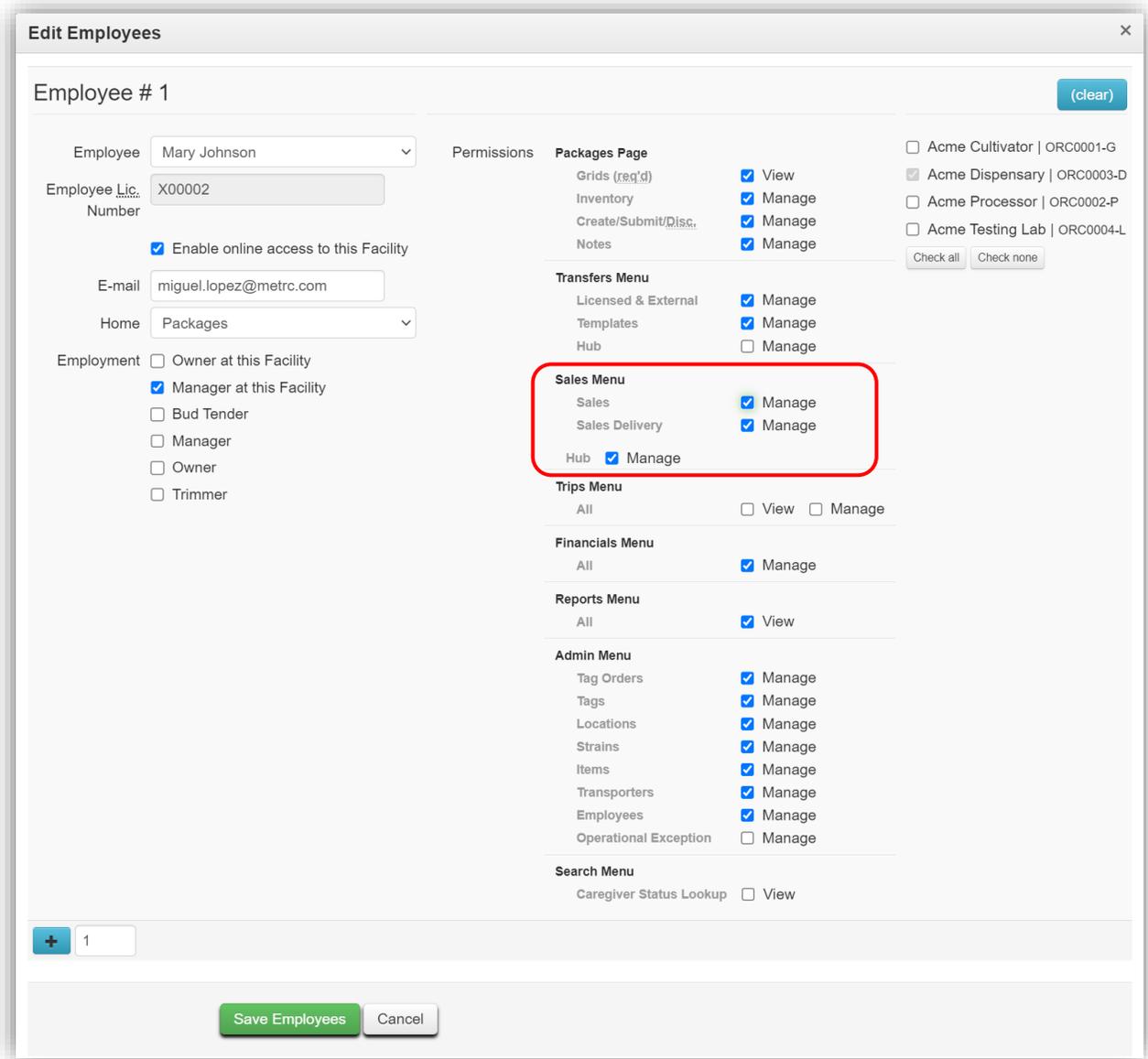


Figure 3: Edit Employee action window with Permissions

After permissions are granted, users will have access to the respective options within the Sales dropdown in the Navigational Toolbar – **see Figure 4.**

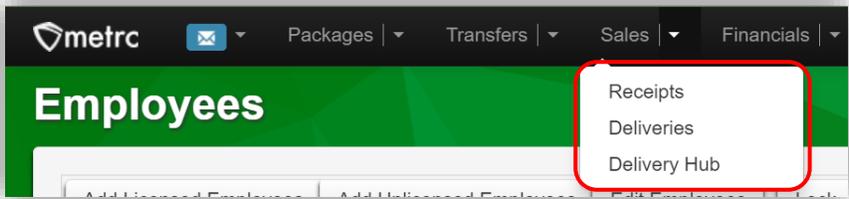


Figure 4: Deliveries option in Sales drilldown

Recording Sales Deliveries

A Sales Delivery Manifest is required to be created once an order has been placed by the customer, similar to a Transfer Manifest is required when transferring a product to another license. These manifests provide necessary visibility when products are being transported off of a licensed premise. When recording the information within the Sales Delivery Manifest, it is important to ensure the required customer information (Consumer ID or Patient number) is accurately reflected.

To begin the process, go to the Sales Deliveries grid by selecting the Deliveries option under the Sales area dropdown on the Navigational Toolbar – **see Figure 5**.

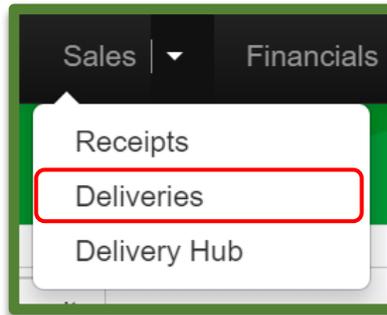


Figure 5: Sales Menu with Deliveries Option

From the Sales Deliveries grid, select the Record Deliveries button to open the Record Deliveries action window and create the Sales Delivery - **see Figure 6**.

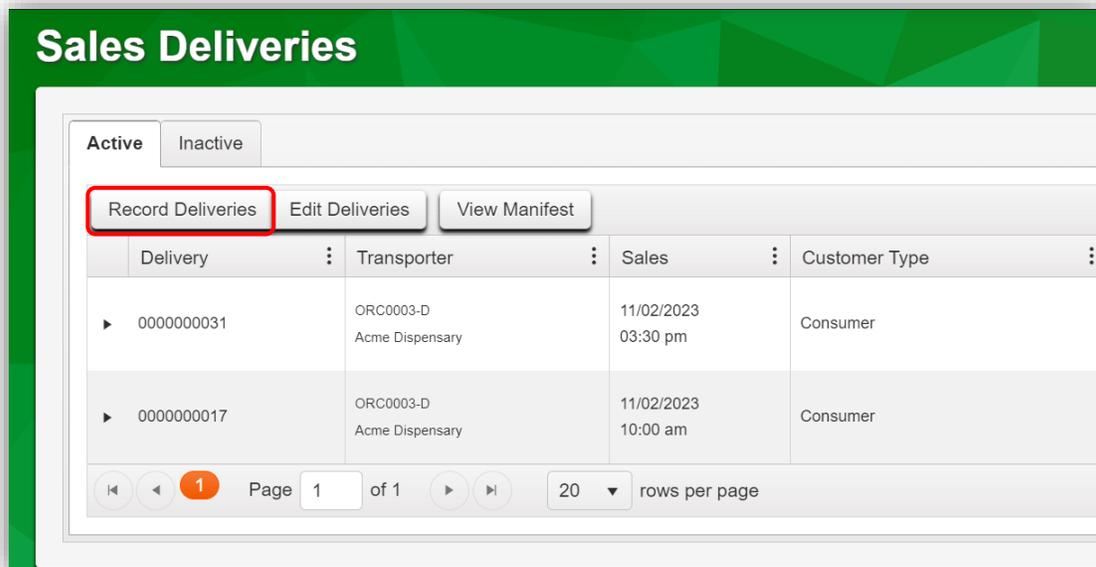
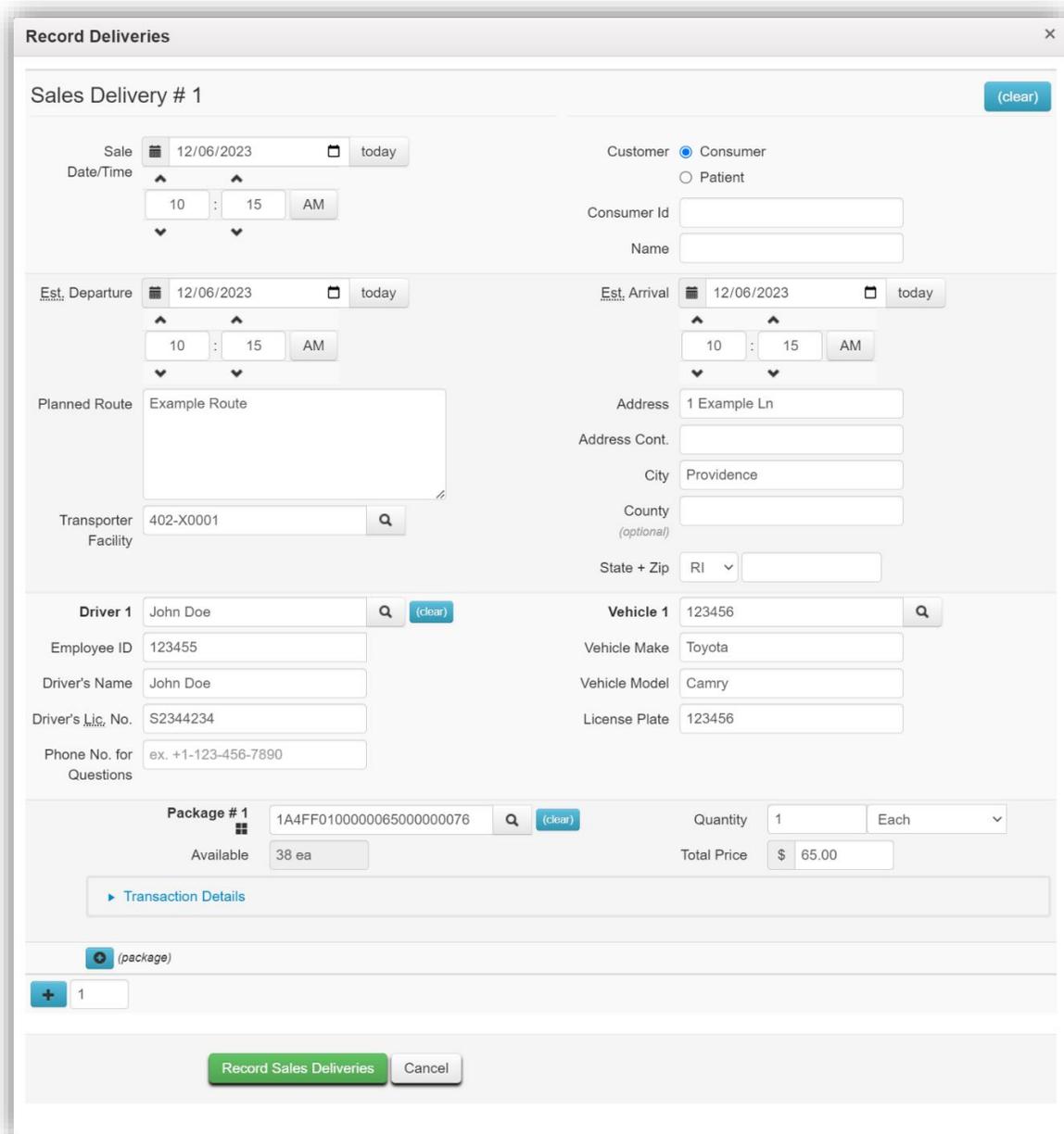


Figure 6: Record Deliveries button

Now in the Record Deliveries action window, the user can enter the details of the Sales Delivery which includes the ability to assign the license that will be physically delivering the sale.

After all the required information is entered, select the green Record Sales Delivery button to complete the Sales Delivery creation process - **see Figure 7.**



The screenshot shows a web application window titled "Record Deliveries" with a close button (X) in the top right corner. The main content area is titled "Sales Delivery # 1" and includes a "(clear)" button. The form is organized into several sections:

- Sale Date/Time:** Includes a date picker set to 12/06/2023 and a "today" button. Below it are time selection fields for 10:15 AM.
- Customer:** Radio buttons for "Consumer" (selected) and "Patient". Below are input fields for "Consumer Id" and "Name".
- Est. Departure:** Date and time fields set to 12/06/2023 at 10:15 AM.
- Est. Arrival:** Date and time fields set to 12/06/2023 at 10:15 AM.
- Planned Route:** A text area containing "Example Route".
- Address:** Input fields for "Address" (1 Example Ln), "Address Cont.", "City" (Providence), "County" (optional), and "State + Zip" (RI).
- Transporter Facility:** An input field with "402-X0001" and a search icon.
- Driver 1:** Input fields for "John Doe", "Employee ID" (123455), "Driver's Name" (John Doe), "Driver's Lic. No." (S2344234), and "Phone No. for Questions" (ex. +1-123-456-7890). Includes a search icon and a "(clear)" button.
- Vehicle 1:** Input fields for "123456", "Vehicle Make" (Toyota), "Vehicle Model" (Camry), and "License Plate" (123456). Includes a search icon.
- Package # 1:** Input field for "1A4FF0100000065000000076" with a search icon and "(clear)" button. Below it are "Available" (38 ea) and "Quantity" (1) fields. A "Total Price" field shows "\$ 65.00".
- Transaction Details:** A button labeled "Transaction Details".
- Package Selection:** A "(package)" label and a quantity selector showing "1".

At the bottom of the window, there are two buttons: a green "Record Sales Deliveries" button and a grey "Cancel" button.

Figure 7: Record Deliveries action window to record Sales Delivery details

After the Sales Delivery is created by the Compassion Center License, it will appear in the Sales Delivery Hub– see **Figure 8**.

The screenshot shows the 'Sales Delivery Hub' interface. At the top, there are navigation tabs for Packages, Transfers, Sales, Financials, Reports, and Admin. The 'Sales' tab is active. The page title is 'Sales Delivery Hub' and the user is logged in as 'Acme Dispensary | ORC0003-D'. Below the header is a table with columns: Delivery, Sales, Customer Type, Destination, Direction, Driver, Vehicle Info, Pkg's, Accepted, ID Verified, and Pay. The table contains three rows of data. The first row is highlighted in orange and shows a delivery with ID 0000000051, dated 12/06/2023 at 10:22 am, for a Consumer at Example Ln, Providence, RI. The second row shows a delivery with ID 0000000031, dated 11/02/2023 at 03:30 pm, for a Consumer at 1234 Test Rd, Test, RI. The third row shows a delivery with ID 0000000046, dated 11/02/2023 at 02:48 pm, for a Patient at 1234 Test Road, Providence, RI. Each row has an 'Edit' and 'Accept' button on the right.

Delivery	Sales	Customer Type	Destination	Direction	Driver	Vehicle Info	Pkg's	Accepted	ID Verified	Pay
▶ 0000000051	12/06/2023 10:22 am	Consumer	Street1: 1 Example Ln Street2: City: Providence State: RI Postal Code: 02908	→ Outbound	John Doe	Make: Toyota Model: Camry Lic. Plate: 123456	1		No	
▶ 0000000031	11/02/2023 03:30 pm	Consumer	Street1: 1234 Test Rd Street2: City: Test State: RI Postal Code: 12345	→ Outbound	John Doe	Make: Toyota Model: Camry Lic. Plate: 123456	1		No	
▶ 0000000046	11/02/2023 02:48 pm	Patient	Street1: 1234 Test Road Street2: City: Providence State: RI Postal Code: 01284	→ Outbound	Snoop Dogg	Make: Chevy Model: Kush Van Lic. Plate: LVWEED	1	11/02/2023 12:12 pm	Yes	Electronic

Figure 8: Newly created Sales Delivery in Sales Delivery Hub

Sales Delivery Hub

For licenses that are permitted to conduct Sales Deliveries directly to a customer, the Sales Delivery Hub offers enhanced visibility through the following actions:

- Acceptance of the delivery
- Departure from the Compassion Center
- Arrival at the destination
- Verification of both ID and payment

The transporter can access the Sales Delivery Hub by selecting the Delivery Hub option under the Sales area dropdown in the Navigational Toolbar - **see Figure 9.**

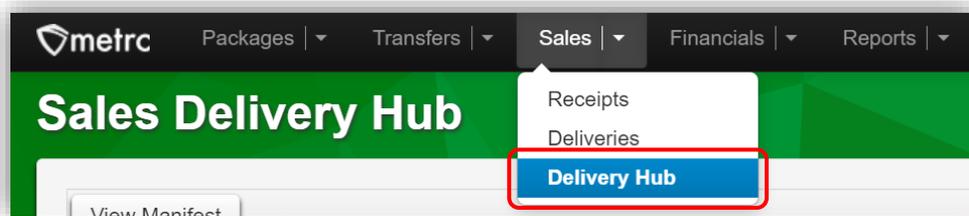


Figure 9: Sales Delivery Hub in Sales area dropdown

From the Sales Delivery Hub grid, all deliveries where the license is listed as the transporter are visible. The license listed as the transporter can only edit transporter details but cannot edit the contents of the delivery.

After the delivery has been physically accepted by the user transporting the delivery, the delivery should be acknowledged by using the Accept button - **see Figure 10.**

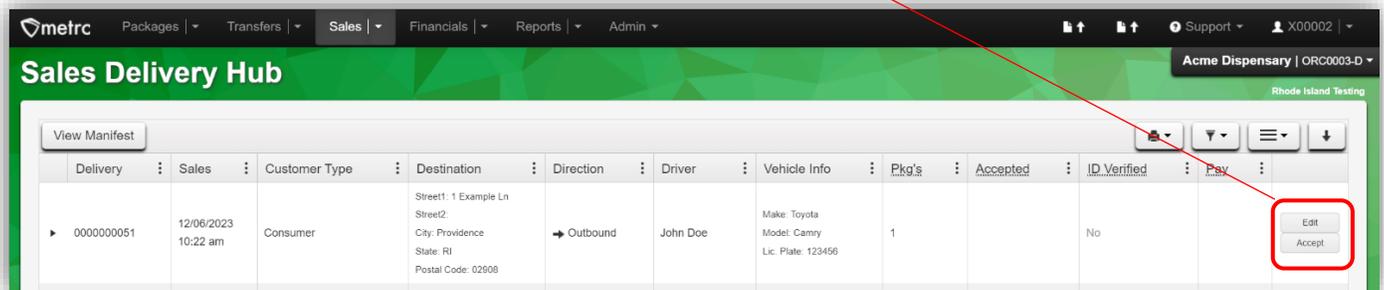


Figure 10: Accept Sales Delivery button

After accepting the delivery in Metrc, confirmation of the transporter’s departure from the Compassion Center should be acknowledged by using the Depart button - see **Figure 11**.

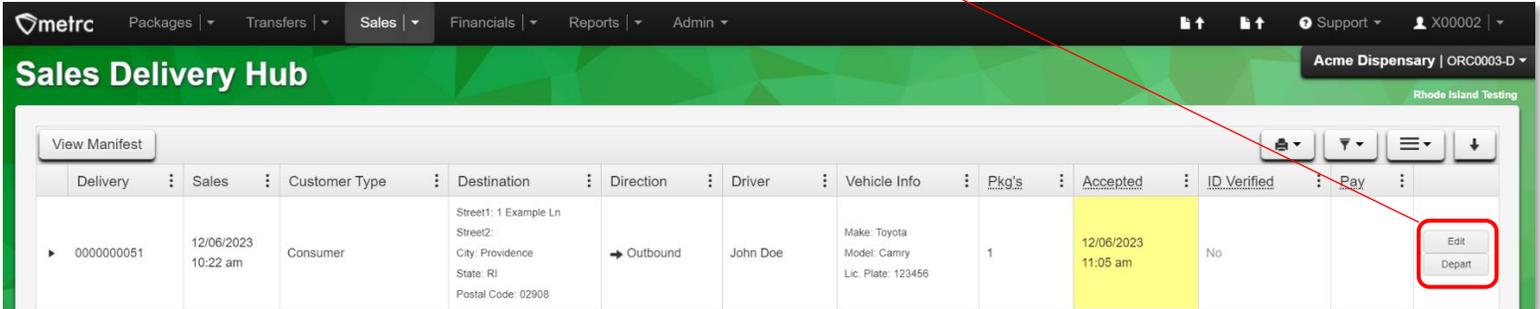


Figure 11: Mark Departure from Retailer Facility

During the Sales Delivery, the end recipient’s ID must be verified. Once ID verification is confirmed, the user transporting the delivery should use the Verify ID button to acknowledge that the ID has been verified – see **Figure 12**.

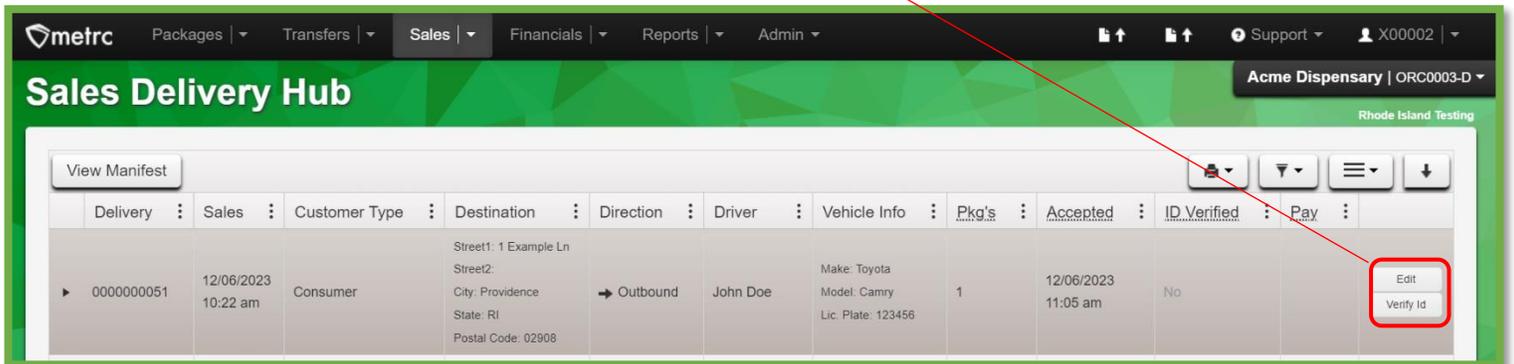
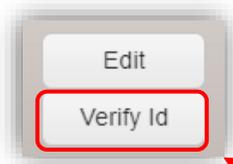
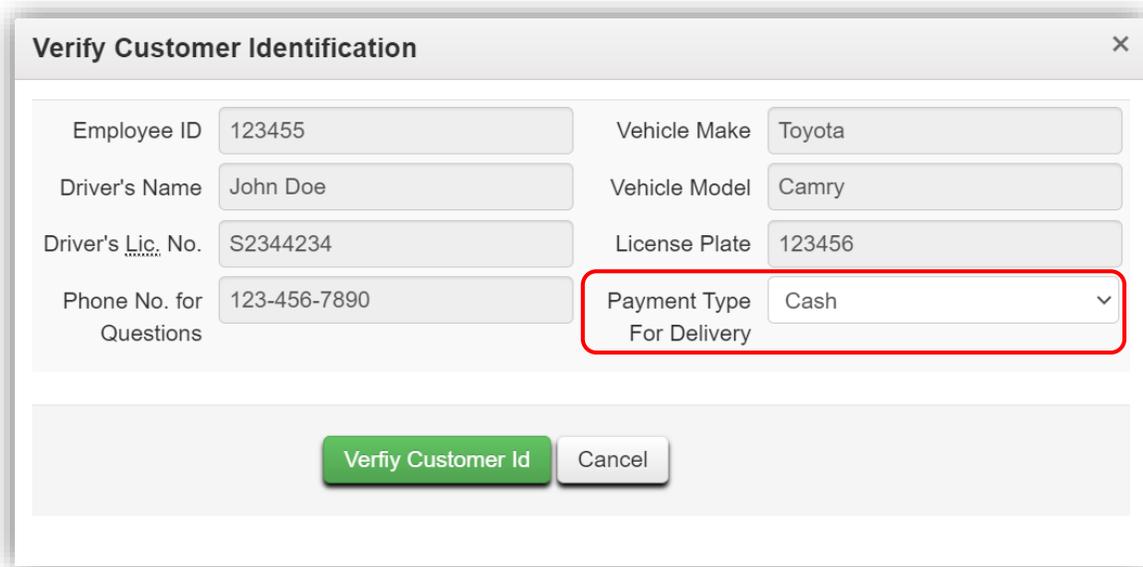


Figure 12: Verify ID of Recipient button

Selecting the Verify ID button will open the Verify Customer Identification action window where the transporting user can confirm the Payment Type as either Cash or Electronic. This should be captured using the dropdown. Then, select the Verify Customer Id green button to complete this action - **see Figure 13**.



Employee ID	123455	Vehicle Make	Toyota
Driver's Name	John Doe	Vehicle Model	Camry
Driver's Lic. No.	S2344234	License Plate	123456
Phone No. for Questions	123-456-7890	Payment Type For Delivery	Cash

Verify Customer Id Cancel

Figure 13: Verify ID Action Window & Payment Type

Marking Sales Deliveries as Complete

Once the Sales Delivery has been verified through the Sales Delivery Hub by the transporter, the Compassion Center license will then need to complete the Sales Delivery in their license by selecting the Complete button for the Sales Delivery in the Sales Deliveries grid – see **Figure 14**.



Delivery	Transporter	Sales	Customer Type	Driver	Vehicle Info	EID	ETA	AA	Completed	Pkg's	Total	Recorded	State	
▶ 0000000051	ORC0003-D Acme Dispensary	12/06/2023 10:22 am	Consumer	John Doe	Make: Toyota Model: Camry Lic. Plate: 123456	12/06/2023 11:00 am	12/06/2023 10:22 am			1	\$65.00	12/06/2023 10:26 am	Shipped	Complete Void
▶ 0000000031	ORC0003-D Acme Dispensary	11/02/2023 03:30 pm	Consumer	John Doe	Make: Toyota Model: Camry Lic. Plate: 123456	11/02/2023 05:10 pm	11/02/2023 05:10 pm			1	\$75.00	10/05/2023 10:15 am	Shipped	Void
▶ 0000000017	ORC0003-D Acme Dispensary	11/02/2023 10:00 am	Consumer	John Doe	Make: Toyota Model: Camry Lic. Plate: 123456	11/02/2023 11:00 am	09/28/2023 10:00 am			1	\$150.00	09/28/2023 07:02 am	Shipped	Complete Void

Figure 14: Complete Sales Delivery

Selecting the Complete button will open an action window where the sales delivery can be finalized by selecting the green Complete Sales Delivery button - see Figure 15.

Complete Delivery [X]

Employee ID	123455	Vehicle Make	Toyota
Driver's Name	John Doe	Vehicle Model	Camry
Driver's Lic. No.	S2344234	License Plate	123456
Phone No. for Questions	123-456-7890	Actual Arrival	12/06/2023 today
Payment Type For Delivery	Cash		11 : 22 AM

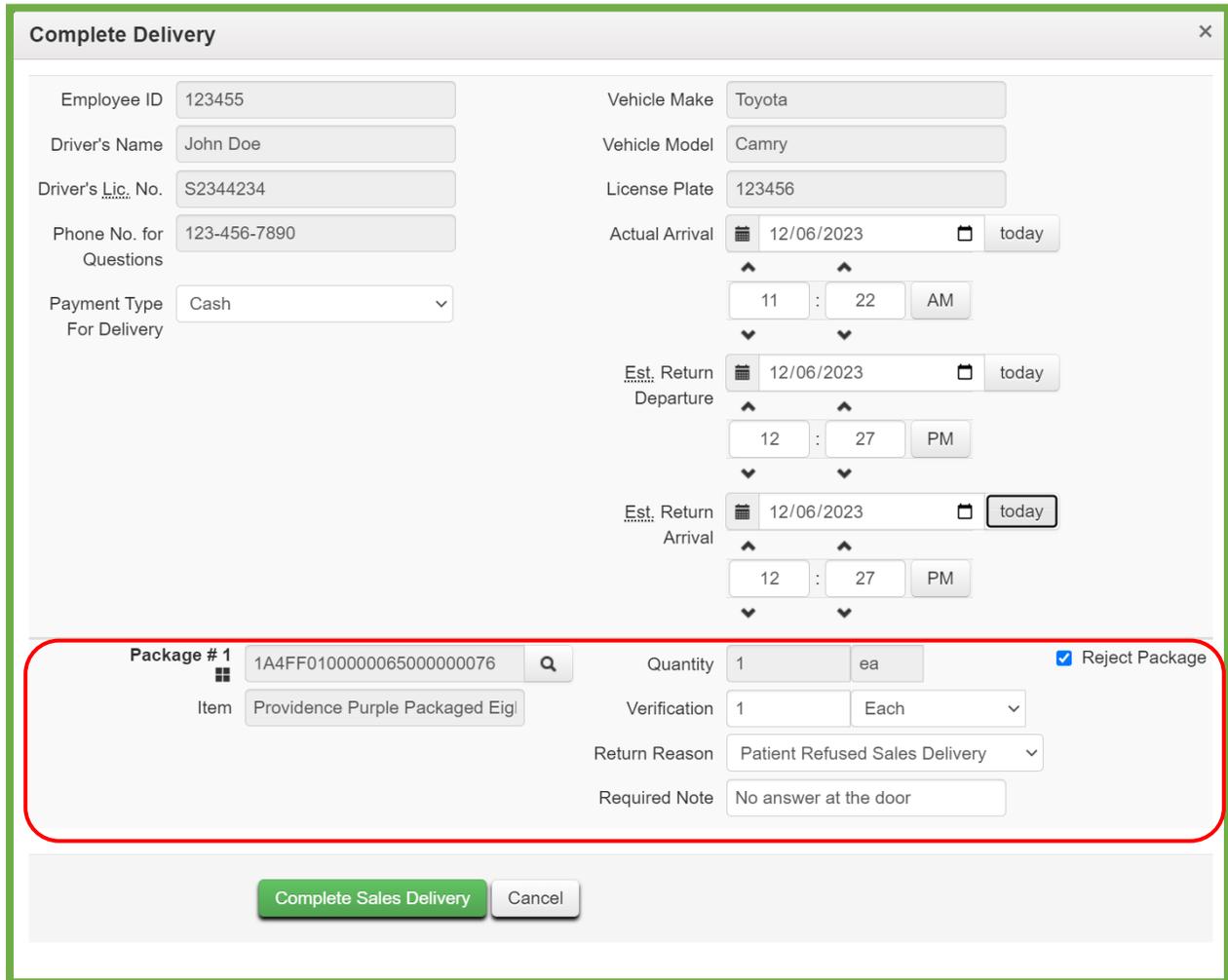
Package # 1 1A4FF0100000065000000076 [Q] Quantity 1 ea Reject Package

Item Providence Purple Packaged Eigi

Complete Sales Delivery Cancel

Figure 15: Complete Delivery Action Window

If the Sales Delivery was unable to be completed, use the Reject Package checkbox to record the necessary information. The user should verify the amount of product being returned using the Verification field, select a reason from the Return Reason dropdown, and add additional details to the Required Note field. Finalize the completed Sales Delivery by selecting the green Complete Sales Delivery button - see **Figure 16**.



Complete Delivery

Employee ID: 123455
 Driver's Name: John Doe
 Driver's Lic. No.: S2344234
 Phone No. for Questions: 123-456-7890
 Payment Type For Delivery: Cash

Vehicle Make: Toyota
 Vehicle Model: Camry
 License Plate: 123456

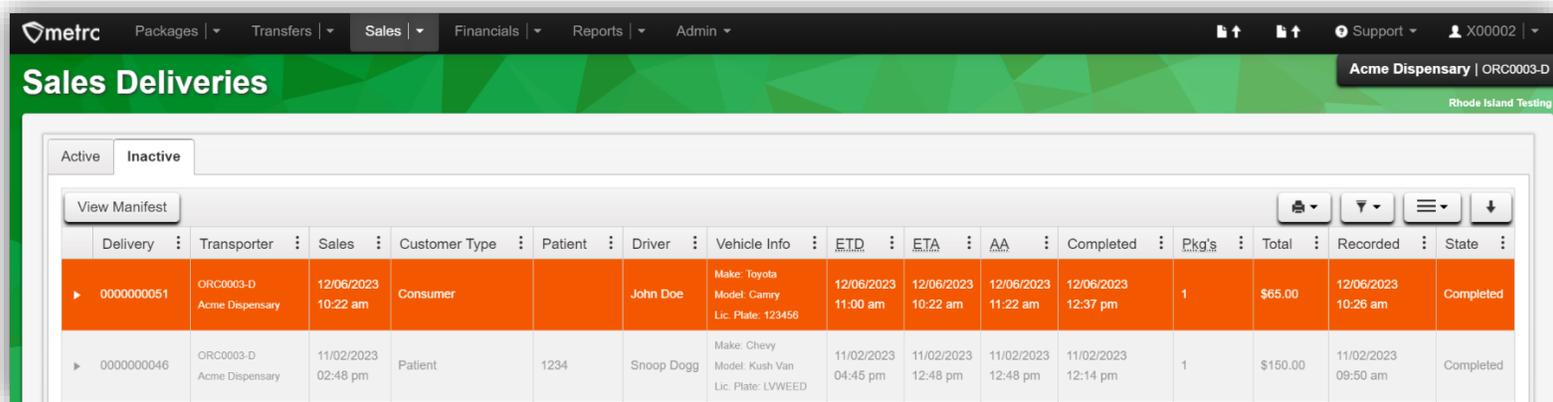
Actual Arrival: 12/06/2023 (today) 11:22 AM
 Est. Return Departure: 12/06/2023 (today) 12:27 PM
 Est. Return Arrival: 12/06/2023 (today) 12:27 PM

Package # 1 1A4FF0100000065000000076 Reject Package
 Item: Providence Purple Packaged Eigh...
 Quantity: 1 ea
 Verification: 1 Each
 Return Reason: Patient Refused Sales Delivery
 Required Note: No answer at the door

Complete Sales Delivery Cancel

Figure 16: Complete Delivery action window with Reject Package

After completing the Sales Delivery, the delivery will be finalized and automatically moved to the Inactive tab in the Sales Deliveries grid – see **Figure 17**.



Delivery	Transporter	Sales	Customer Type	Patient	Driver	Vehicle Info	ETD	ETA	AA	Completed	Pkg's	Total	Recorded	State
0000000051	ORC0003-D Acme Dispensary	12/06/2023 10:22 am	Consumer		John Doe	Make: Toyota Model: Camry Lic. Plate: 123456	12/06/2023 11:00 am	12/06/2023 10:22 am	12/06/2023 11:22 am	12/06/2023 12:37 pm	1	\$65.00	12/06/2023 10:26 am	Completed
0000000046	ORC0003-D Acme Dispensary	11/02/2023 02:48 pm	Patient	1234	Snoop Dogg	Make: Chevy Model: Kuch Van Lic. Plate: LWWEED	11/02/2023 04:45 pm	11/02/2023 12:48 pm	11/02/2023 12:48 pm	11/02/2023 12:14 pm	1	\$150.00	11/02/2023 09:50 am	Completed

Figure 17: Inactive tab with completed Sales Deliveries

Metrc Resources

If you have any questions, or need additional support, the following resources are available:

Contact Metrc Support: 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 on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more.

Thank you for your continued partnership.