

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**.

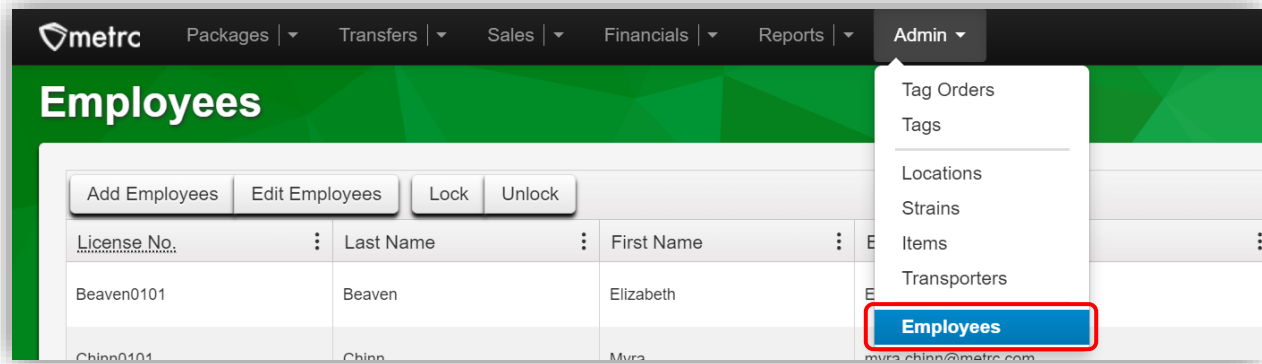


Figure 1: Employees grid in the Admin area dropdown

- 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.**

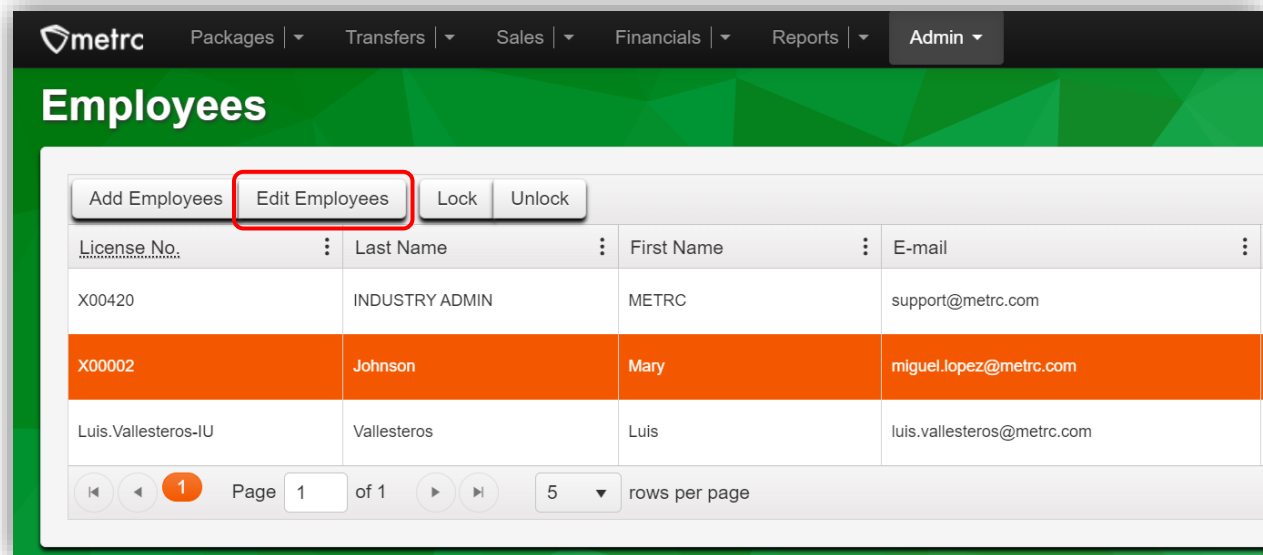


Figure 2: Edit Employees button in the Employees grid

- 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.

Edit Employees

Employee # 1

Employee

Mary Johnson

Employee Lic. Number

X00002

☒ Enable online access to this Facility

E-mail

miguel.lopez@metrc.com

Home

Packages

Employment

☐ Owner at this Facility

☒ Manager at this Facility

☐ Bud Tender

☐ Manager

☐ Owner

☐ Trimmer

Permissions

Packages Page

Grids (req'd)

☒ View

Inventory

☒ Manage

Create/Submit/Disc.

☒ Manage

Notes

☒ Manage

Transfers Menu

Licensed & External

☒ Manage

Templates

☒ Manage

Hub

☐ Manage

Sales Menu

Sales

☒ Manage

Sales Delivery

☒ Manage

Hub

☒ Manage

Trips Menu

All

☐ View ☐ Manage

Financials Menu

All

☒ Manage

Reports Menu

All

☒ View

Admin Menu

Tag Orders

☒ Manage

Tags

☒ Manage

Locations

☒ Manage

Strains

☒ Manage

Items

☒ Manage

Transporters

☒ Manage

Employees

☒ Manage

Operational Exception

☐ Manage

Search Menu

Caregiver Status Lookup

☐ View

☐ Acme Cultivator | ORC0001-G

☒ Acme Dispensary | ORC0003-D

☐ Acme Processor | ORC0002-P

☐ Acme Testing Lab | ORC0004-L

Check all

Check none

+

1

Save Employees

Cancel

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.**

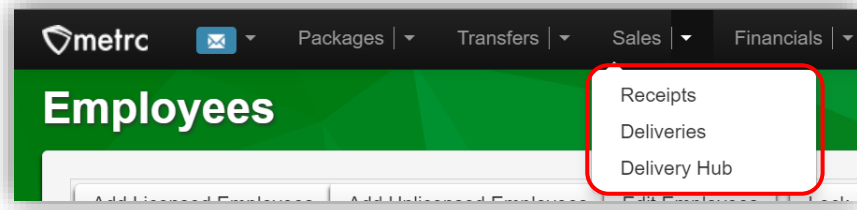


Figure 4: Deliveries option in Sales drilldown

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**.

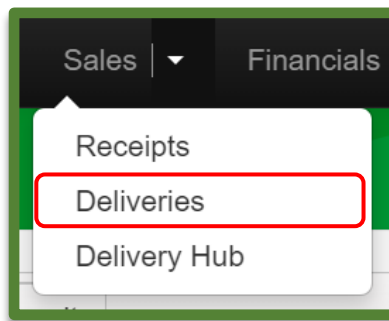


Figure 5: Sales Menu with Deliveries Option

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**.

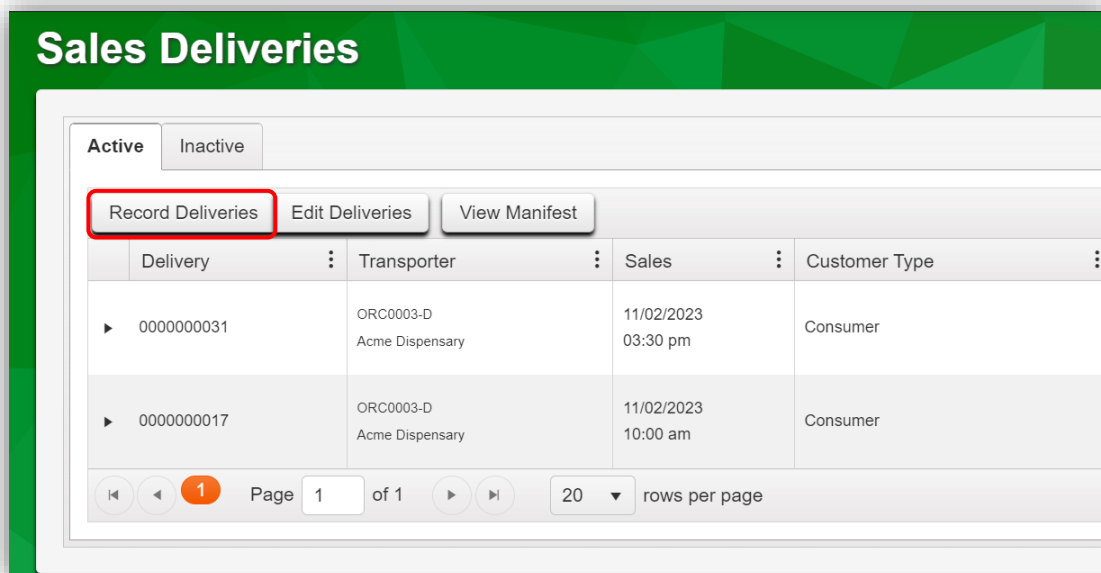
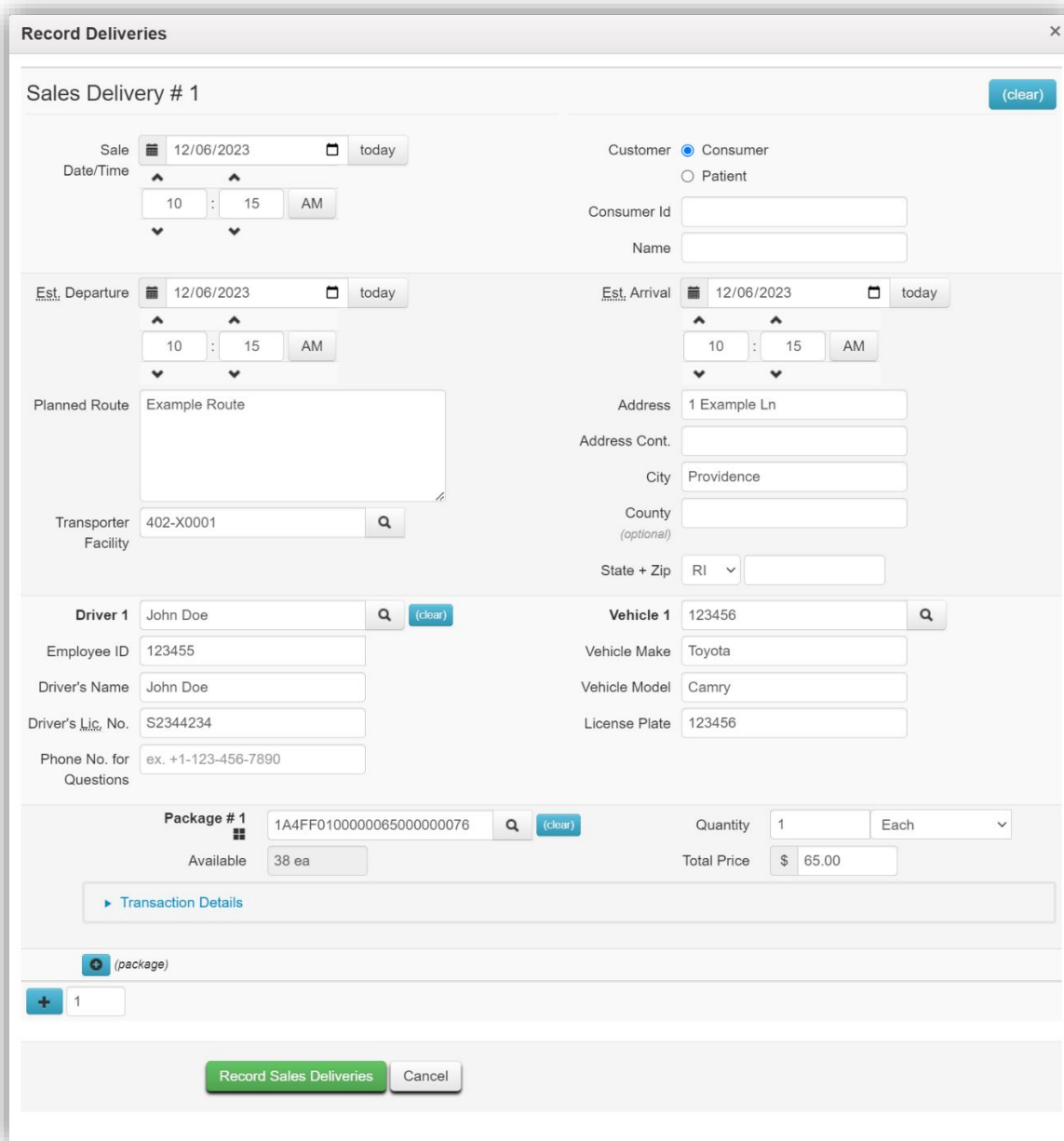


Figure 6: Record Deliveries button

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.**

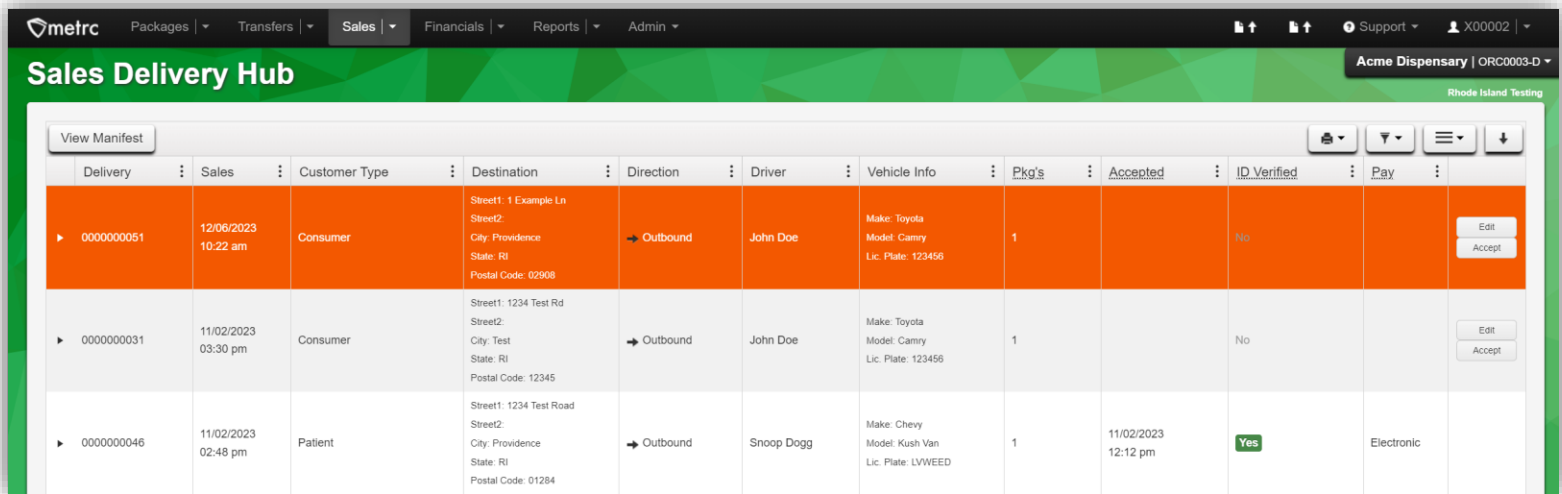


The image shows a screenshot of the "Record Deliveries" action window. The window title is "Record Deliveries" with a close button (X) in the top right corner. Below the title bar, the text "Sales Delivery # 1" is displayed, followed by a "(clear)" button. The form is organized into several sections:

- Sale Date/Time:** Includes a date picker set to "12/06/2023" and a "today" button. Below it are time selectors for hours (10) and minutes (15), and a dropdown for AM/PM.
- Customer:** Radio buttons for "Consumer" (selected) and "Patient". Below are input fields for "Consumer Id" and "Name".
- Est. Departure:** A date picker set to "12/06/2023" and a "today" button, with time selectors for hours (10) and minutes (15), and a dropdown for AM/PM.
- Est. Arrival:** A date picker set to "12/06/2023" and a "today" button, with time selectors for hours (10) and minutes (15), and a dropdown for AM/PM.
- Planned Route:** A text area containing "Example Route".
- Transporter Facility:** An input field with "402-X0001" and a search icon.
- Address:** Input fields for "Address" (1 Example Ln), "Address Cont.", "City" (Providence), "County" (optional), and "State + Zip" (RI).
- Driver 1:** Input fields for "Driver 1" (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). Each field has a search icon and a "(clear)" button.
- Vehicle 1:** Input fields for "Vehicle 1" (123456), "Vehicle Make" (Toyota), "Vehicle Model" (Camry), and "License Plate" (123456). Each field has a search icon.
- Package # 1:** An input field with "1A4FF0100000065000000076", a search icon, and a "(clear)" button. Below it, "Available" is shown as "38 ea".
- Quantity and Price:** "Quantity" is set to "1" with a dropdown for "Each". "Total Price" is displayed as "\$ 65.00".
- Transaction Details:** A section with a blue arrow icon and the text "Transaction Details".
- Package Selection:** A section with a blue plus icon and the text "(package)". Below it is a quantity selector with a plus icon and the number "1".
- Buttons:** At the bottom, there are two buttons: "Record Sales Deliveries" (green) and "Cancel" (gray).

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 Metrc Sales Delivery Hub interface. The top navigation bar includes links for Packages, Transfers, Sales (selected), Financials, Reports, and Admin. The user is logged in as X00002. The page title is "Sales Delivery Hub" and the location is "Acme Dispensary | ORC0003-D". A "View Manifest" button is visible. The table below lists three sales deliveries with columns for Delivery ID, Sales Date/Time, Customer Type, Destination, Direction, Driver, Vehicle Info, Pkg's, Accepted, ID Verified, and Pay.

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: Kuch 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**.

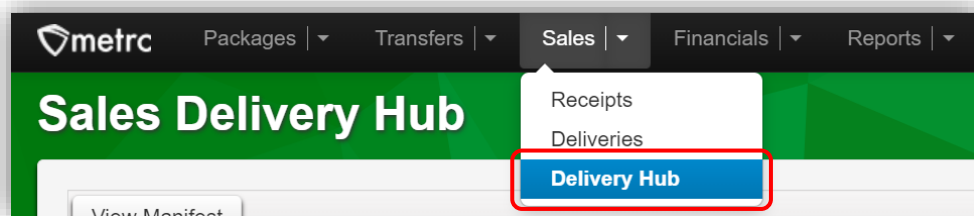


Figure 9: Sales Delivery Hub in Sales area dropdown

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**.

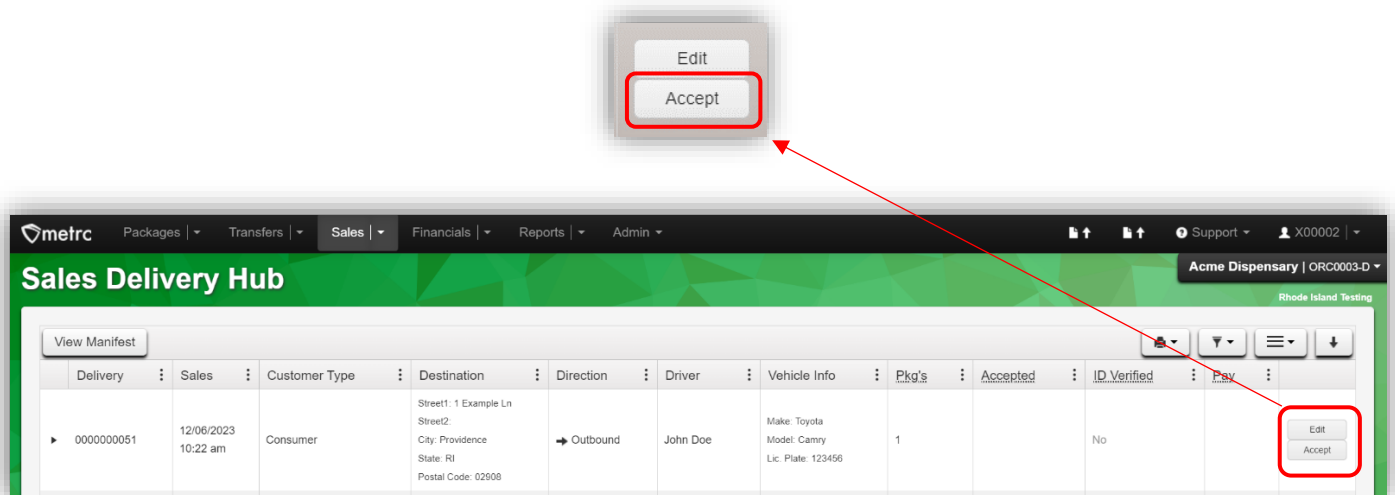


Figure 10: Accept Sales Delivery button

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**.

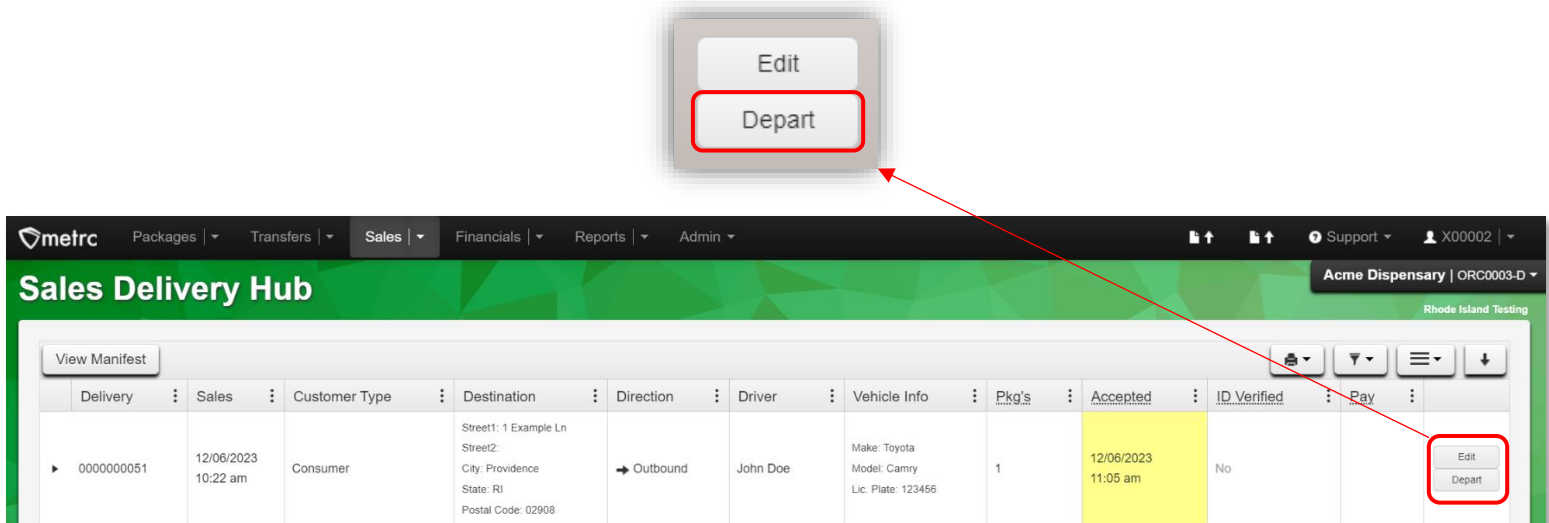


Figure 11: Mark Departure from Retailer Facility

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**.

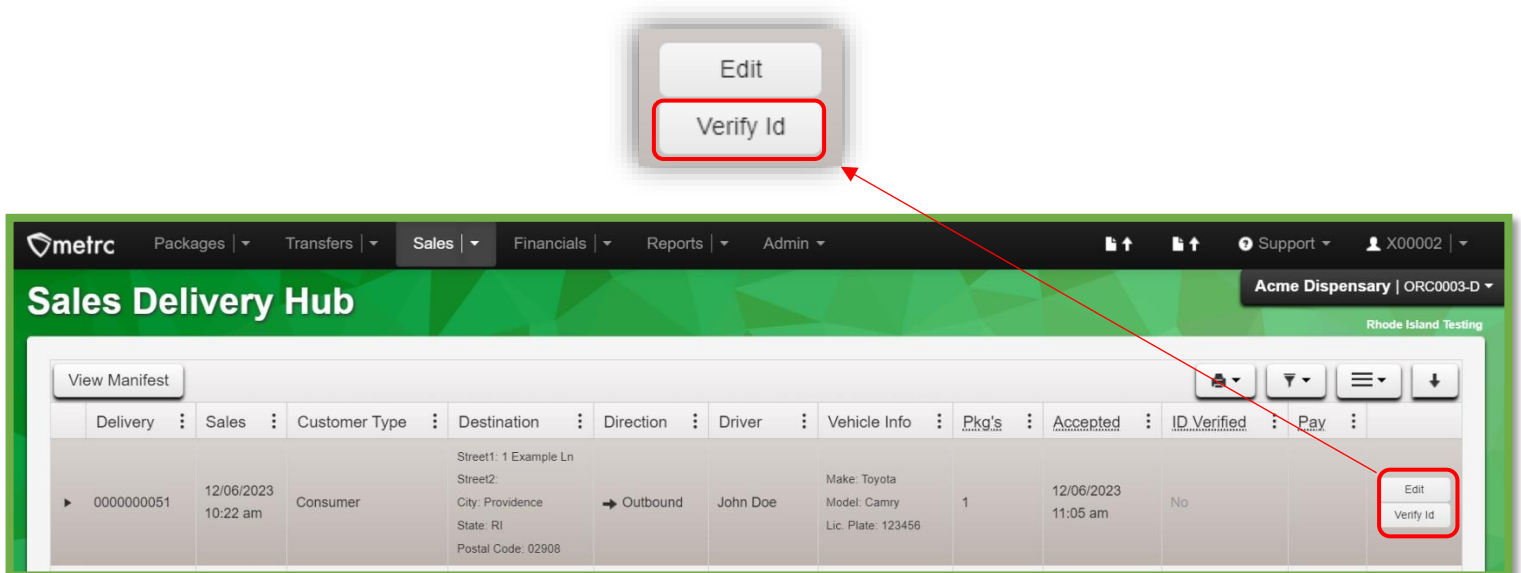
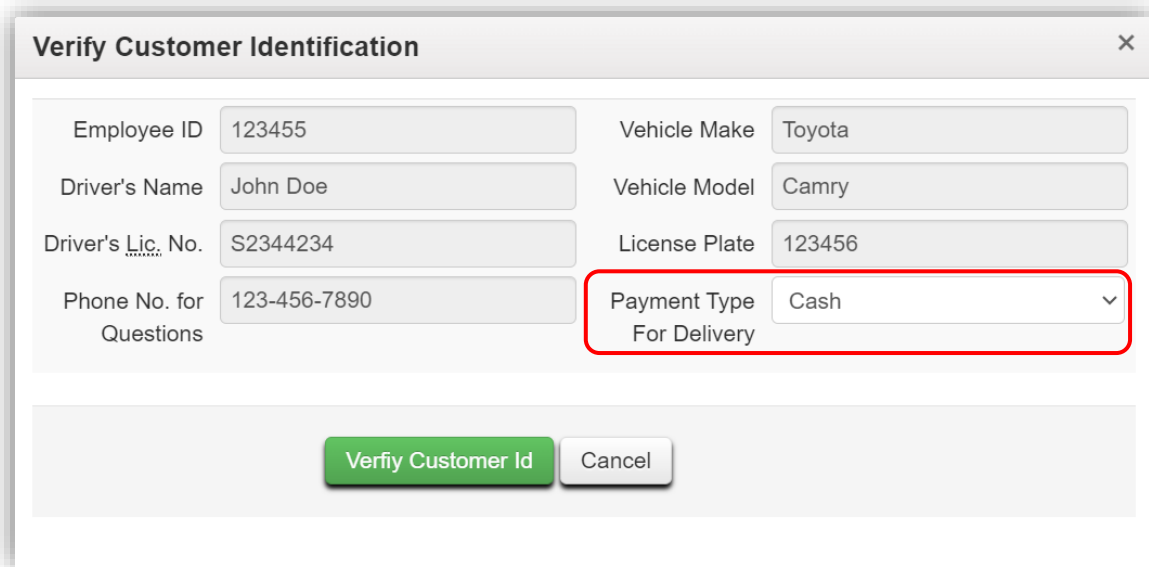


Figure 12: Verify ID of Recipient button

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**.



The image shows a 'Verify Customer Identification' window with a close button (X) in the top right corner. The window contains two columns of input fields. The left column includes: 'Employee ID' (123455), 'Driver's Name' (John Doe), 'Driver's Lic. No.' (S2344234), and 'Phone No. for Questions' (123-456-7890). The right column includes: 'Vehicle Make' (Toyota), 'Vehicle Model' (Camry), 'License Plate' (123456), and 'Payment Type For Delivery' (Cash). The 'Payment Type For Delivery' dropdown is highlighted with a red rectangle. At the bottom, there are two buttons: a green 'Verify Customer Id' button and a grey 'Cancel' button.

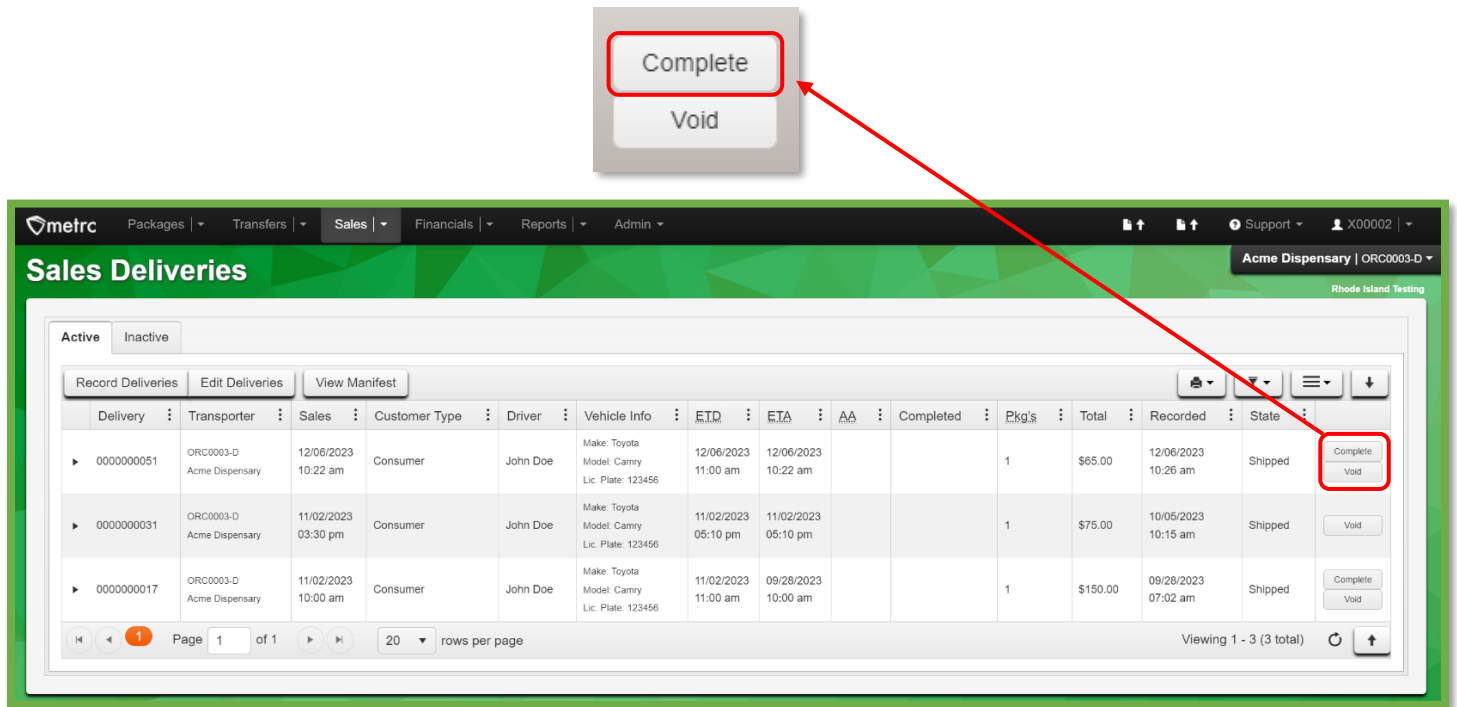
Employee ID	123455	Vehicle Make	Toyota
Driver's Name	John Doe	Vehicle Model	Camry
Driver's Lic. No.	S2344234	License Plate	123456
Phone No. for Questions	123-456-7890	Payment Type For Delivery	Cash

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**.

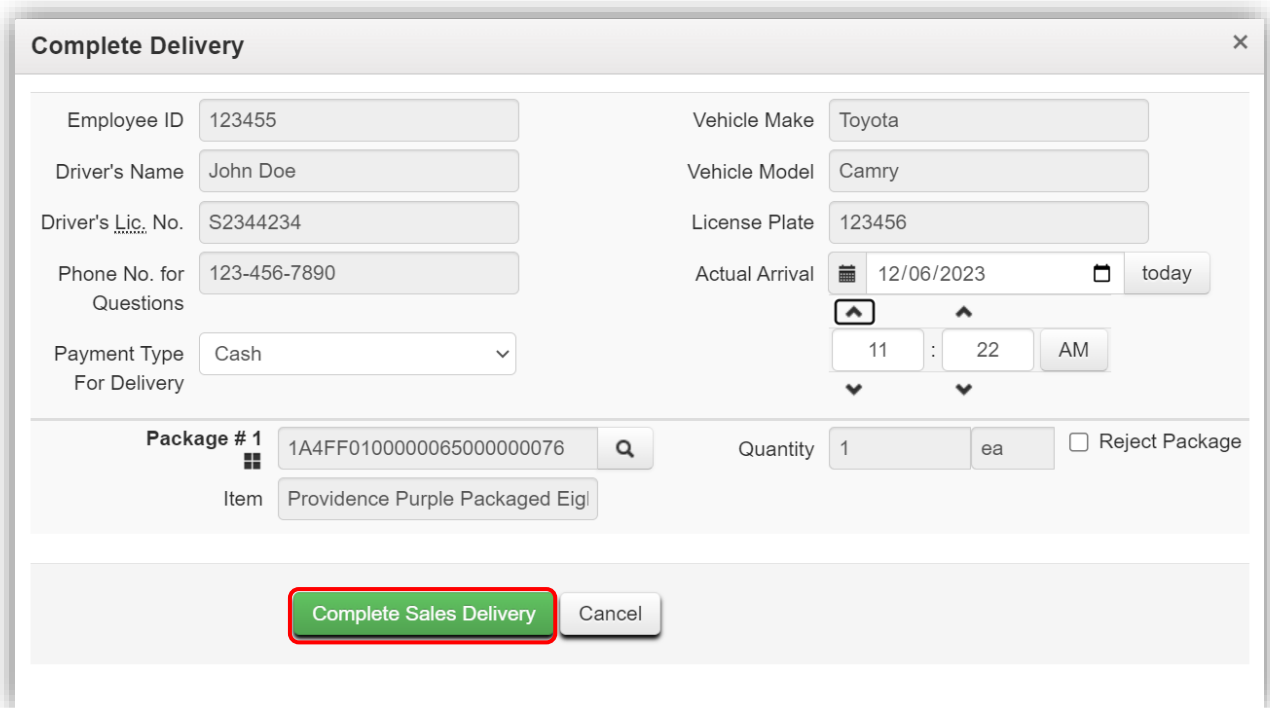


The screenshot shows the Metrc Sales Deliveries interface. At the top, there's a navigation bar with tabs: Packages, Transfers, Sales, Financials, Reports, and Admin. The 'Sales' tab is selected. Below the navigation bar, the page title is 'Sales Deliveries'. On the right, there's a dropdown menu showing 'Acme Dispensary | ORC0003-D'. Below the title, there are tabs for 'Active' and 'Inactive', with 'Active' selected. Below the tabs, there are buttons for 'Record Deliveries', 'Edit Deliveries', and 'View Manifest'. The main area is a table with columns: Delivery, Transporter, Sales, Customer Type, Driver, Vehicle Info, ETD, ETA, AA, Completed, Pkg's, Total, Recorded, State, and Action. The first three rows of data are visible. The first row has a 'Complete' button in the Action column, which is highlighted with a red box. A red arrow points from this button to a callout box above the table. The callout box contains two buttons: 'Complete' and 'Void', with 'Complete' highlighted by a red border. The bottom of the page shows pagination information: 'Page 1 of 1', '20 rows per page', and 'Viewing 1 - 3 (3 total)'.

Delivery	Transporter	Sales	Customer Type	Driver	Vehicle Info	ETD	ETA	AA	Completed	Pkg's	Total	Recorded	State	Action
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**.



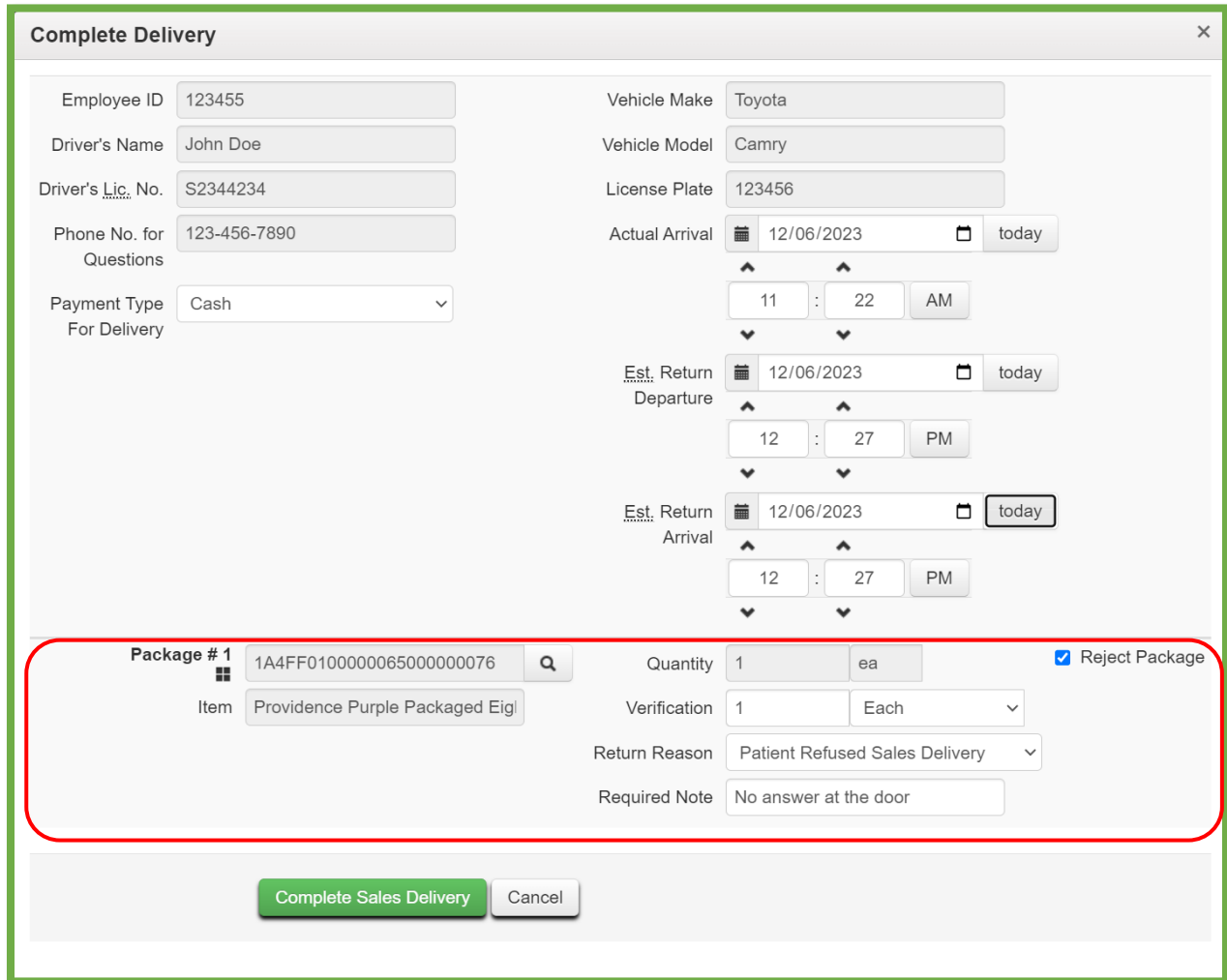
The image shows a software window titled "Complete Delivery" with a close button (X) in the top right corner. The window contains several input fields for delivery information, organized into two columns. The left column includes fields for Employee ID (123455), Driver's Name (John Doe), Driver's License No. (S2344234), Phone No. for Questions (123-456-7890), and Payment Type For Delivery (Cash). The right column includes fields for Vehicle Make (Toyota), Vehicle Model (Camry), License Plate (123456), and Actual Arrival (12/06/2023). Below these fields, there is a section for Package # 1, which includes a barcode (1A4FF0100000065000000076), a search icon, and a quantity field (1 ea). The item name is "Providence Purple Packaged Eigi". At the bottom of the window, there are two buttons: "Complete Sales Delivery" (highlighted with a red border) and "Cancel".

Employee ID	123455	Vehicle Make	Toyota
Driver's Name	John Doe	Vehicle Model	Camry
Driver's License No.	S2344234	License Plate	123456
Phone No. for Questions	123-456-7890	Actual Arrival	12/06/2023
Payment Type For Delivery	Cash		today
Package # 1	1A4FF0100000065000000076	Quantity	1 ea
Item	Providence Purple Packaged Eigi		<input type="checkbox"/> Reject Package

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**.



The screenshot shows a 'Complete Delivery' window with a light gray background and a green border. The window is divided into two main sections. The top section contains fields for driver and vehicle information, arranged in two columns. The bottom section, highlighted with a red border, contains package and return details. At the bottom of the window are two buttons: 'Complete Sales Delivery' (green) and 'Cancel' (gray).

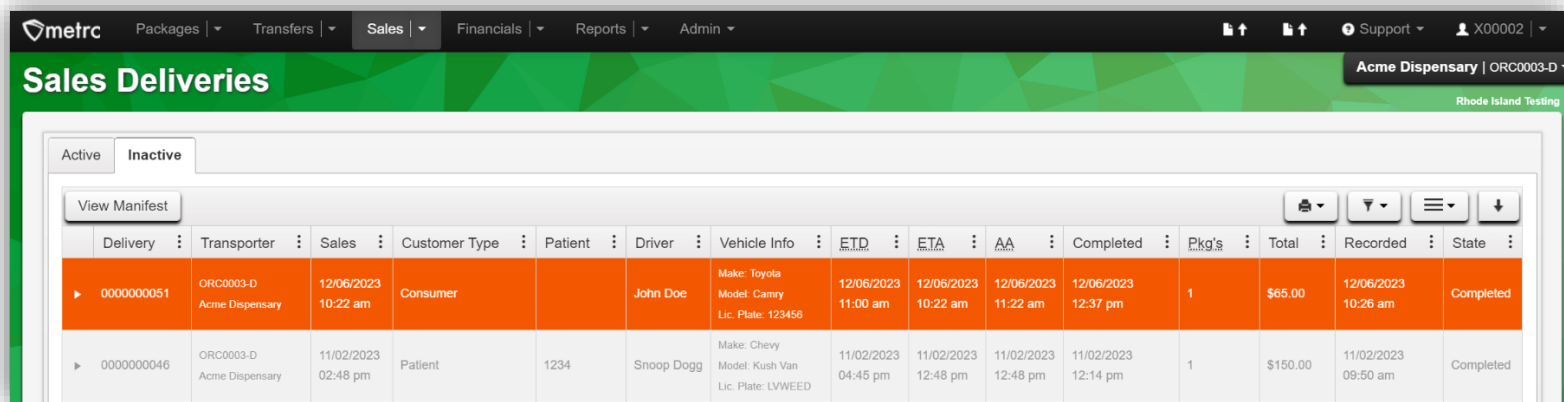
Employee ID	123455	Vehicle Make	Toyota
Driver's Name	John Doe	Vehicle Model	Camry
Driver's Lic. No.	S2344234	License Plate	123456
Phone No. for Questions	123-456-7890	Actual Arrival	12/06/2023 today
Payment Type For Delivery	Cash		11 : 22 AM
		Est. Return Departure	12/06/2023 today
			12 : 27 PM
		Est. Return Arrival	12/06/2023 today
			12 : 27 PM

Package # 1	1A4FF0100000065000000076	Quantity	1	ea	<input checked="" type="checkbox"/> Reject Package
Item	Providence Purple Packaged Eigh	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**.



Sales Deliveries														
Acme Dispensary ORC0003-D														
Rhode Island Testing														
Active Inactive														
View Manifest														
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: LVWEED	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.