

Bulletin Number:	Distribution Date:	Effective Date:
DC_IB_0059 Auto Finalizing	12/18/2023	12/27/2023
Packages and 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, 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.

🤇 metrc 🛛 🗖	 Pac 	kages 👻 Transfers	• S	Sales - Reports -									B t	Support -
Sales Re	ceipt	s					2				Z			CO Lot
Import Sales	Daily Sales	(read-only)												
Active	tive													A. Y.
	tive sipts Edit	Receipts Finalize Sales	:	Customer Type	1	Patient	1	Packages	1	Total	:	Recorded	:	Finalized
Active Ina Record Rec	tive eipts Edit	Receipts Finalize	:	Customer Type Consumer	1	Patient	I	Packages	I	Total \$1.00	:	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 sold, sales total, and date/time the sale was recorded in Metrc – **see Figure 2** below.



	s Receip	ເອ		-1						Colorado -
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	ceipts liveries livery Hub						K			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



After an inactive sales receipt is unfinalized, the respective sales receipt will move back to the 'Active' tab as demonstrated in **Figure 4**.

netrc	🖂 * 🛛 F	ackages 👻	Transfers 🕶	Sal	es - Reports -	Admin 👻								• †	? Support ◄
les R	leceip	ts													CO Lof
mport Sales	Daily Sal	es (read-only)													
Active	Inactive														
-	1		<u> </u>											(
Record F	Receipts E	dit Receipts	Finalize												A- T-
Rece	eipt	Sales		:	Customer Type	:	Patient	:	Packages	:	Total	:	Recorded	: Fi	nalized
▶ 00000	00981	01/11/202	3 04:35 pm		Consumer				1		\$1.00		01/11/2023 06:36 pm	No	2
	1 Page	1 of 1	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.

ac	kages										CO Loft
Ac	tive On Hold Inactive I	n Transit									
	New Packages Submit for Testing	New Transfer	Change Locations Char	nge Items C	hange <u>Reg'd LT</u>	Bs Adju	st Change N	otes Finish			
-	Тад	Src. H's I	Src. Pkg's :	Src. Pi's	Location :	Item :	Category :	Item Strain	Quantity	P.B. No.	Lab Testing
	Q # ABCDEF012345670000015435	2019-04-03- Harvest Room-H	ABCDEF012345670000015429		Storage Vault	Buds - Texas Oll	Buds	Texas Oil	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** below.

ackages																					CO Lof	y Rec-
Active On Hold	Inactive	In	Transit																	~		
Unfinish		;	Src. H's	Stc. Pkg's	:	SrcPi's	: Lo	ocation :	Patient	Item	Categ	ory	Item Strain	: Qui	antity :	P.B. No.	: Lab	Testing	: AH	i Date	Revid	E
> O # AECDE	01234567000001543	5	2019-04-03 Harvest Room H	ABCDEF0123456700000154	179		5%	orage Vault		Buds - Texas Oil	Buds		Texas Oil	0.9			Test	Passed		10/11/202		Ye

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	•	n Transit															1
Unfinish Tag	3	Src. H's	: 5	Src. Pkg's	Src. Pi's	: Lo	ocation :	Patient :	Item :	Category :	Item Strain	Quantity	P.B. No.	: Lab Testing	: /	А.Н. :	Date

Figure 7: Unfinishing Packages

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

ack	ages																			
Activ	e On Hold	Inactive	n Transit																	
Ne	w Packages	Submit for Testing	New Transfer	Chi	ange Locations Change Ite	ems Cha	ange	Regid LTBs	Adjust	Chang	ge Notes Fi	nish								
	Tag	1	SrcH's	:	Src. Pkg's	Src. Pi's	:	Location :	Item	:	Category	Item Strain	Quantity	:	P.B. No.	Lab Testing	: A.H.	. :	Date :	Rov's
																	No			

Figure 8: Unfinishing Packages - Active tab confirmation

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