

Bulletin Number: NJ_IB_0019	Distribution Date: 05/28/2024	Effective Date: 06/27/2024
Contact Point: Metrc Support	Subject: Sales Deliveries	
Reason: Providing information regarding home delivery and how to register delivery sales in Metrc		

Greetings,

In conjunction with the New Jersey Cannabis Regulatory Commission (CRC), Metrc is providing information on the process of registering Home Sales Delivery for home deliveries.

Sales Delivery functionality in Metrc is available for Adult Use Retailers (Class 5 Retailer) and endorsement to conduct Home Delivery Sales is granted directly through the CRC. Please reach out to crc.compliance@crc.nj.gov with questions about how to qualify for home delivery sales as an Adult Use Retailer.

Beginning on June 27, 2024, all Adult Use Retailers endorsed to conduct Home Deliveries Sales will be expected to appropriately log those home delivery sales in Metrc according to the following process. Any Sales Deliveries logged as sales receipts occurring before that date will be reflected in the system as such. Adult Use Retailers desiring to correct previously entered sales receipts to a sales delivery may do so.

This bulletin includes the following information:

- Sales Delivery vs. Sales Receipts
- Employee Permissions for Sales Delivery
- Recording Sales Deliveries in Metrc
- Notes about Sales Delivery via a third-party POS system

Please read on for more details.

Sales Delivery vs. Sales Receipts

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 off the licensed premises is reported as a **Sales Delivery**.
- Any transaction that takes place on the licensed premises is reported as a **Sales Receipt**.

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

Employee Permissions for Sales Delivery

Employees who will report sales activity must be granted appropriate permission to complete those reporting actions. These permissions can only be granted by a user with administrative permissions.

To grant permission to an employee, go to the Admin area on the navigational toolbar, then select the Employees option from the drop-down to access the Employees grid – see **Figure 1**.

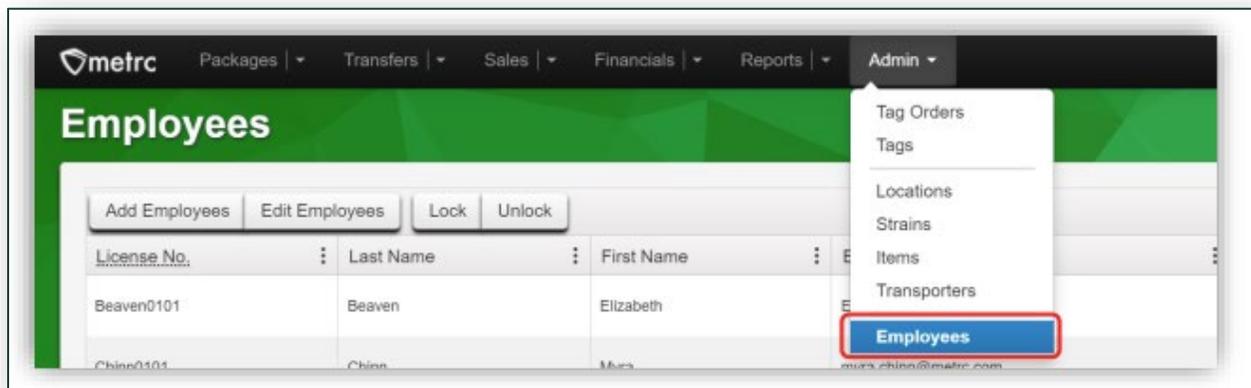


Figure 1: Accessing the Employees grid from Admin drop down

Once on the Employees grid, select the Employee that needs to be granted permission to highlight and click on the Edit Employees button to open the Edit Employees action window – see Figure 2.

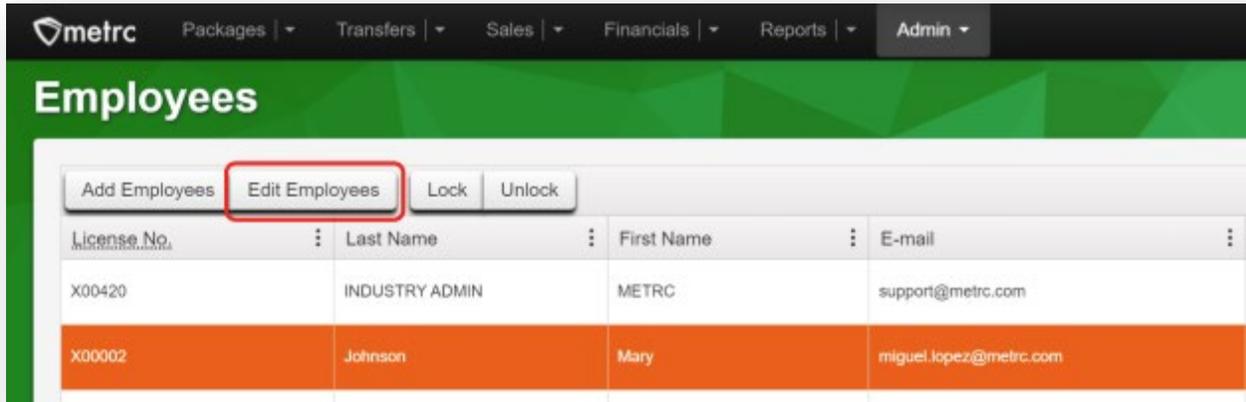


Figure 2: Edit Employees button in the Employees grid

From the Edit Employees action window, locate the Sales Menu part of permissions – see Figure 3 below.

- **Sales** – grants access to the Receipts grid and permissions to manage.
- **Sales Delivery** – grants access to Sales Deliveries grid and permissions to manage.
- **Hub** – grants access to the Sales Delivery Hub grid and permissions to manage.

Check the View or Manage checkbox to the left of each permission that the user is being granted. Once all permissions have been updated, click the Save Employees button to save the permissions that have been granted.

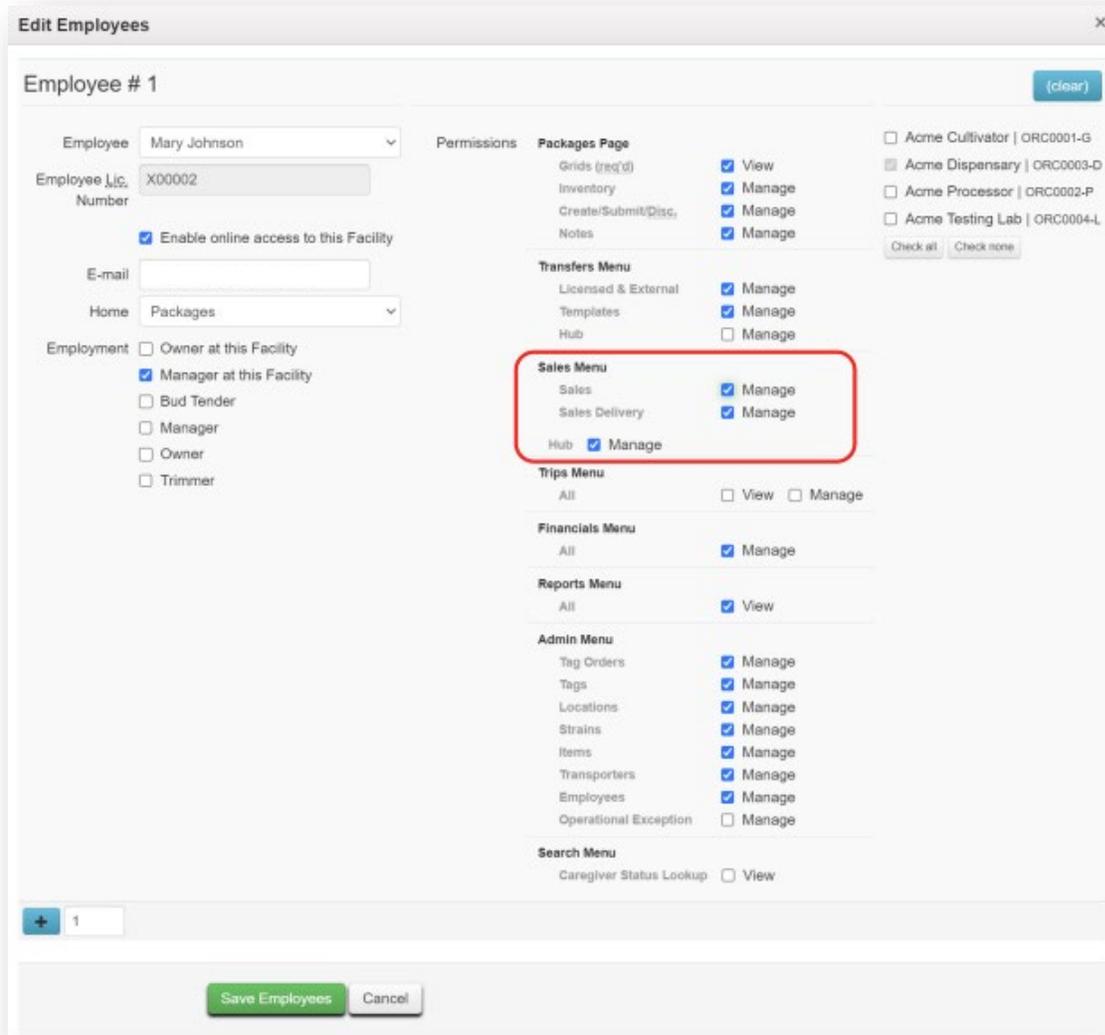


Figure 3: Sales Menu permissions options

After permissions are granted, users will have access to the respective options within the Sales area drop down on the navigational toolbar – see **Figure 4**.

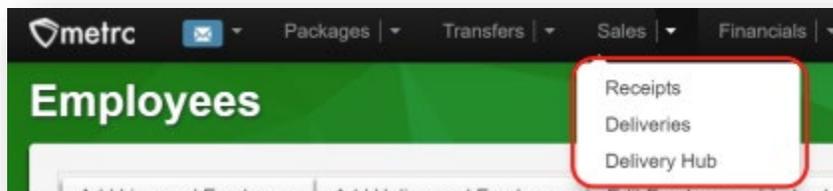


Figure 4: Deliveries option in Sales drop down

Recording Delivery Sales

The creation of a Sales Delivery Manifest is required once an order has been placed by the customer, similar to a Transfer Manifest being required when transferring product to another license. These manifests provide necessary visibility when products are being transported off a licensed premise.

To begin the process, navigate to the Sales Deliveries grid by selecting the Deliveries option under the Sales area dropdown on the navigational toolbar – **see Figure 5**.

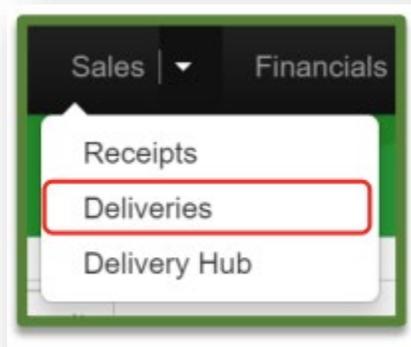


Figure 5: Sales Menu with Deliveries option

From the Sales Deliveries grid, select the Record Deliveries button. This will open the Record Deliveries action window so the Sales Delivery can be created – **see Figure 6**.

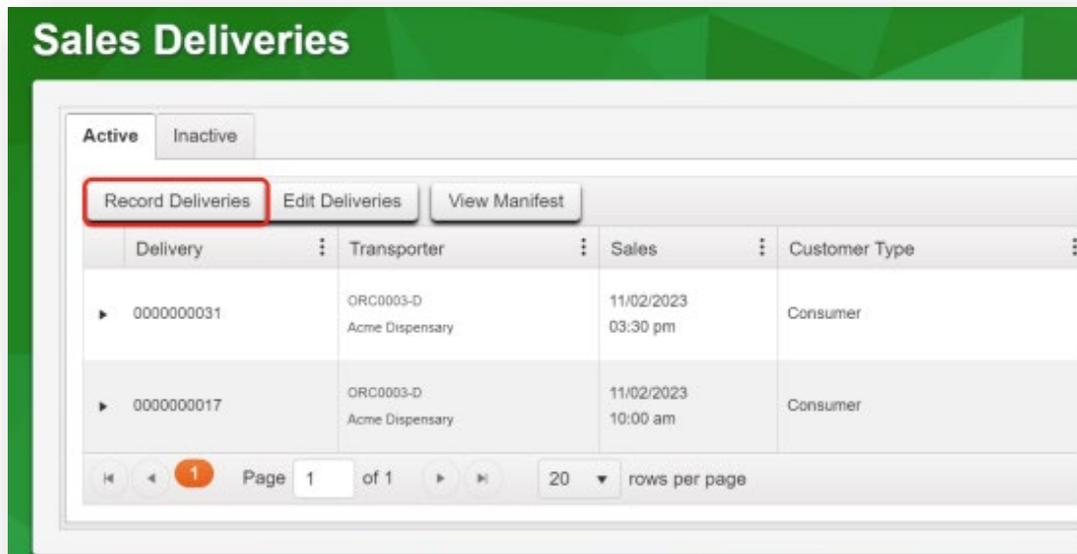


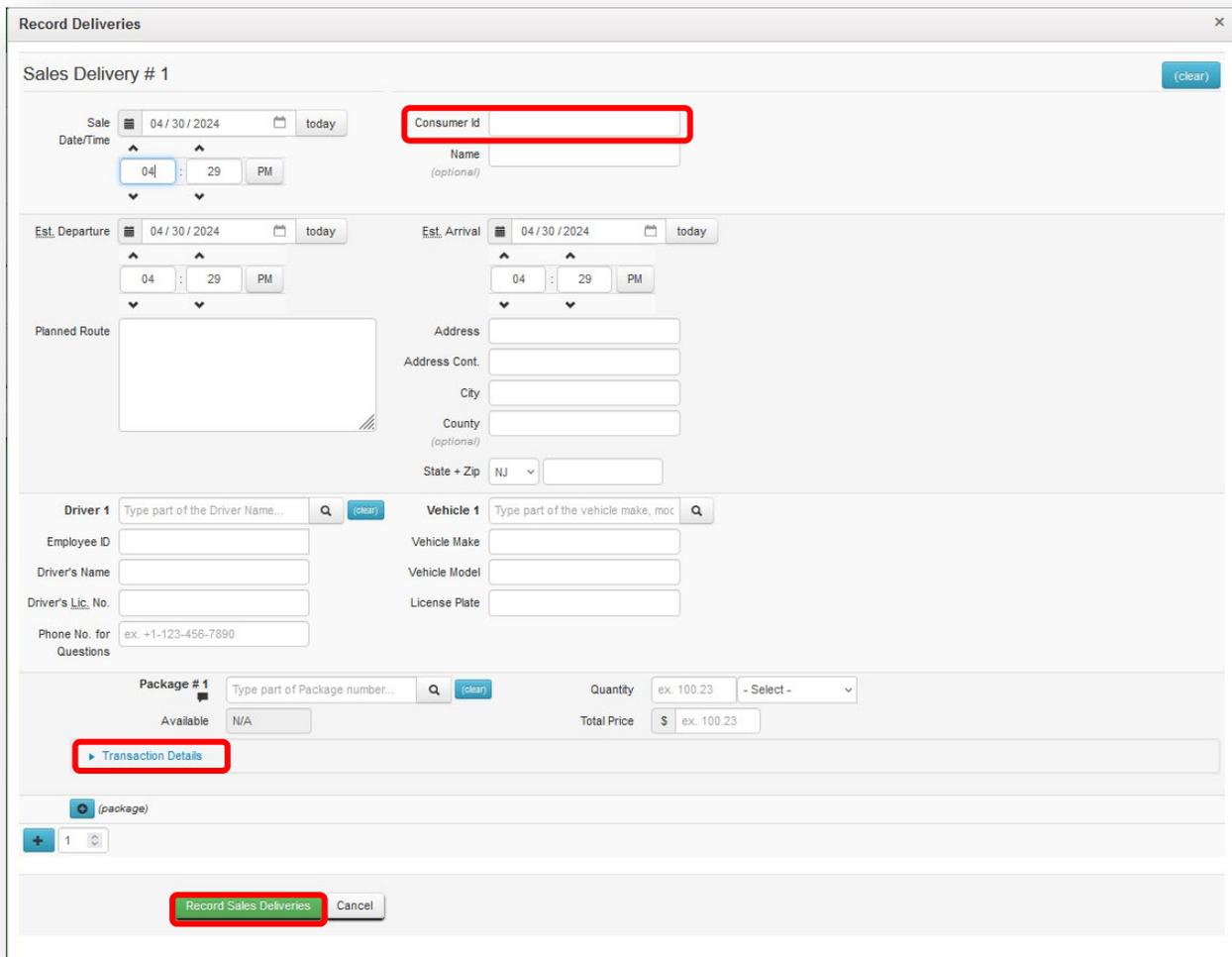
Figure 6: Record Deliveries button

In the Record Deliveries action window, enter the details of the Sales Delivery, which includes the ability to assign the license that will be physically delivering the product being sold.

Note: Consumer ID field will need to be populated with the receipt number from the transaction once it has been completed. To initially record the delivery, input “Receipt #” in the Consumer ID field as a placeholder.

To record additional optional information such as invoice number, taxes, and discounts, click the blue drop-down beside Transaction Details. For more information about this function, reference [NJ Industry Bulletin 0006](#).

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



The screenshot shows the 'Record Deliveries' window for 'Sales Delivery # 1'. The form includes fields for Sale Date/Time (04/30/2024), Consumer ID (highlighted with a red box), Name (optional), Est. Departure (04/30/2024), Est. Arrival (04/30/2024), Planned Route, Address, Address Cont., City, County (optional), State + Zip (NJ), Driver 1 (Employee ID, Name, Lic. No., Phone No. for Questions), Vehicle 1 (Make, Model, License Plate), Package # 1 (Quantity: ex. 100.23, Total Price: \$ ex. 100.23), and a Transaction Details dropdown (highlighted with a red box). At the bottom, there is a 'Record Sales Deliveries' button (highlighted with a red box) and a 'Cancel' button.

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

Completing a Sales Delivery

Once the Sales Delivery has been delivered to the customer, the Retailer should edit the Sales Delivery to update the Consumer ID field with the receipt number. To edit the Sales Delivery, go to the Sales Deliveries grid and select the Sales Delivery to be edited, then click the Edit Deliveries button to open the Edit Deliveries action window – see Figure 8.



Figure 8: Edit Sales Delivery

In the Edit Deliveries action window, copy the delivery number to the Consumer ID field, then click the Edit Sales Deliveries button at the bottom of the action window – see Figure 9.

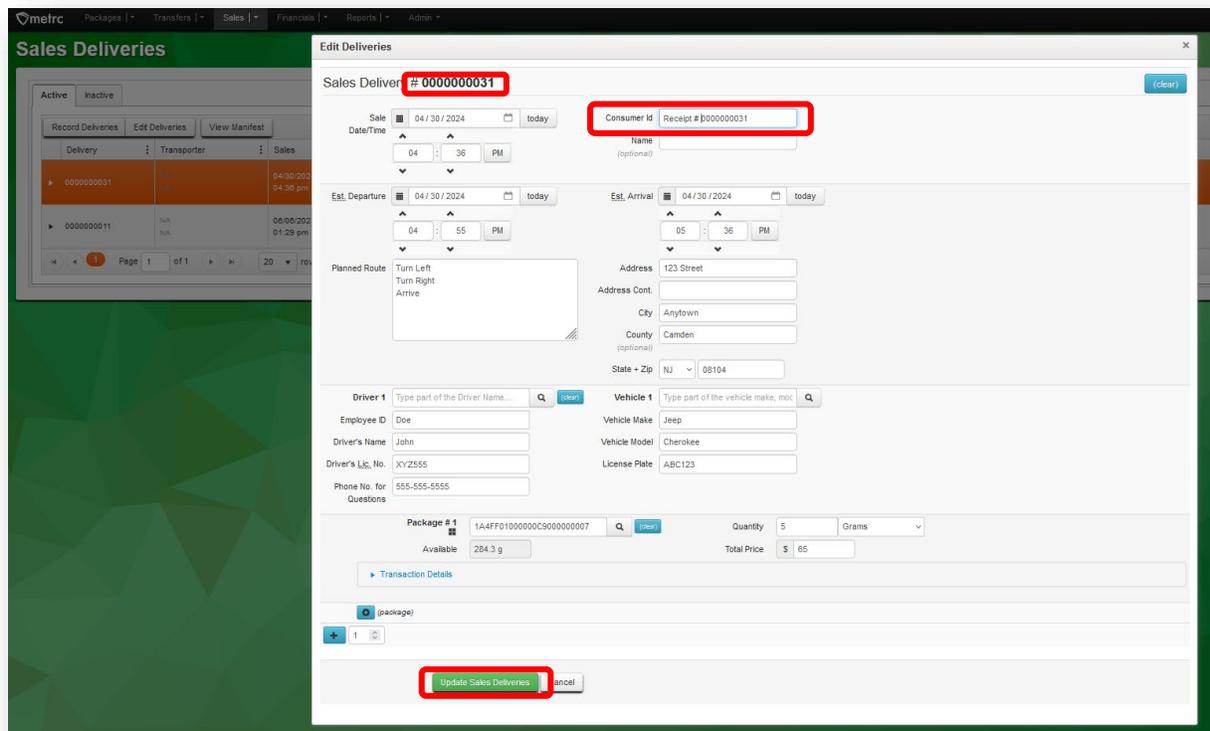


Figure 9: Edit Deliveries to update Consumer ID field with Receipt number

To complete the Sales Delivery, locate the Sales Delivery on the Sales Deliveries grid and click the Complete button – see **Figure 10**.

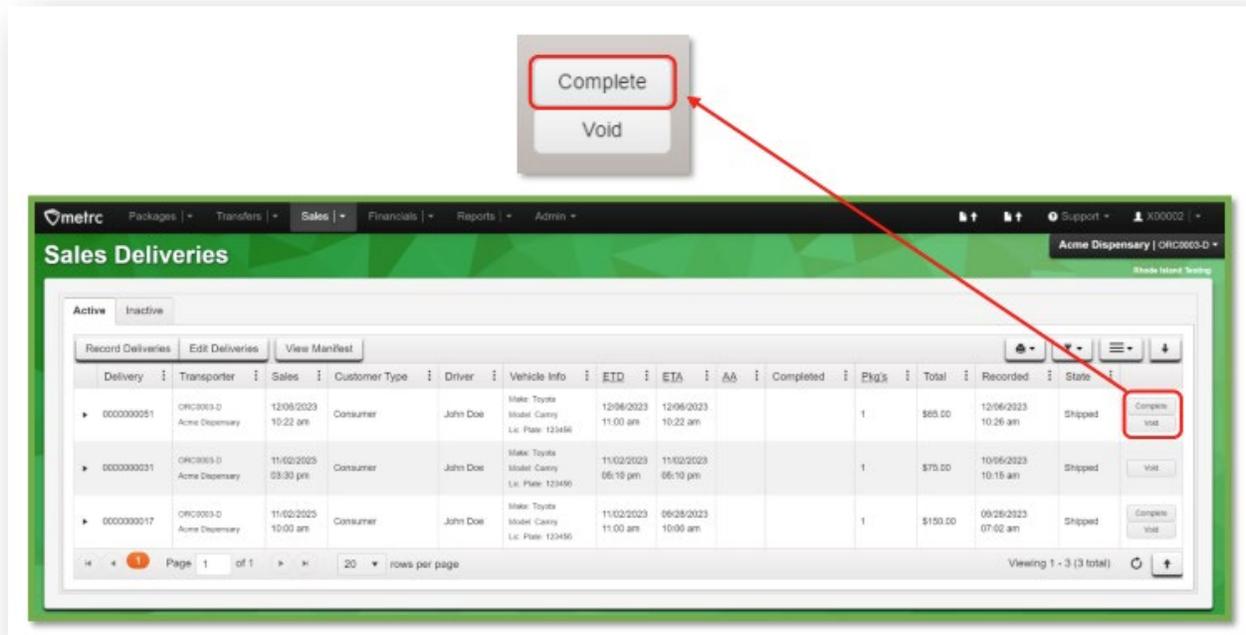


Figure 10: Complete Sales Delivery

Selecting the Complete button will open the Complete Delivery action window to finalize the Sales Delivery. This includes the Payment Type For Delivery and then selecting the green Complete Sales Delivery button – see **Figure 11**.

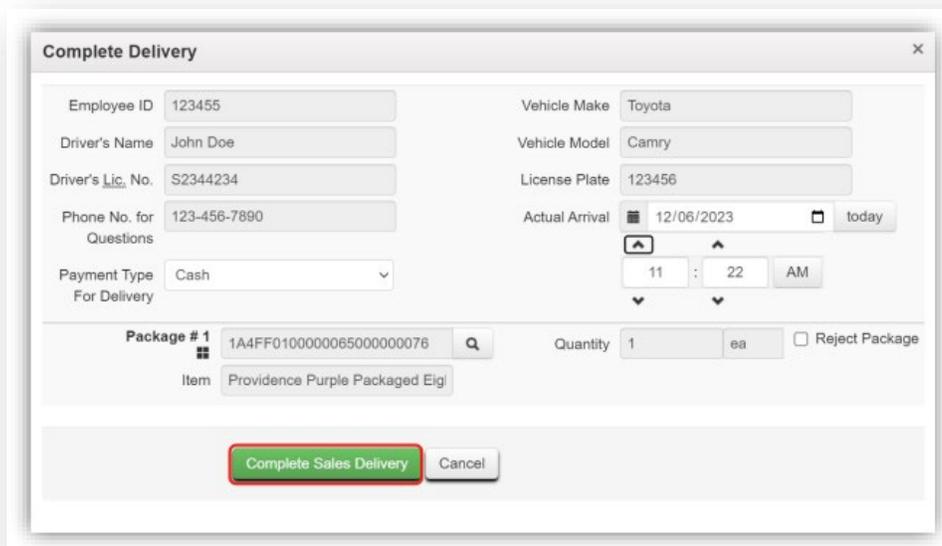


Figure 11: Complete Delivery action window

If the Sales Delivery was unable to be completed, use the Reject Package checkbox to record the necessary information, including in the following fields:

- **Verification:** Confirm the amount of product being returned
- **Return Reason:** Select a reason for the return from the drop-down
- **Required Note:** Add any additional details

Then, finalize the rejected Sales Delivery by selecting the green Complete Sales Delivery button – see **Figure 12**.

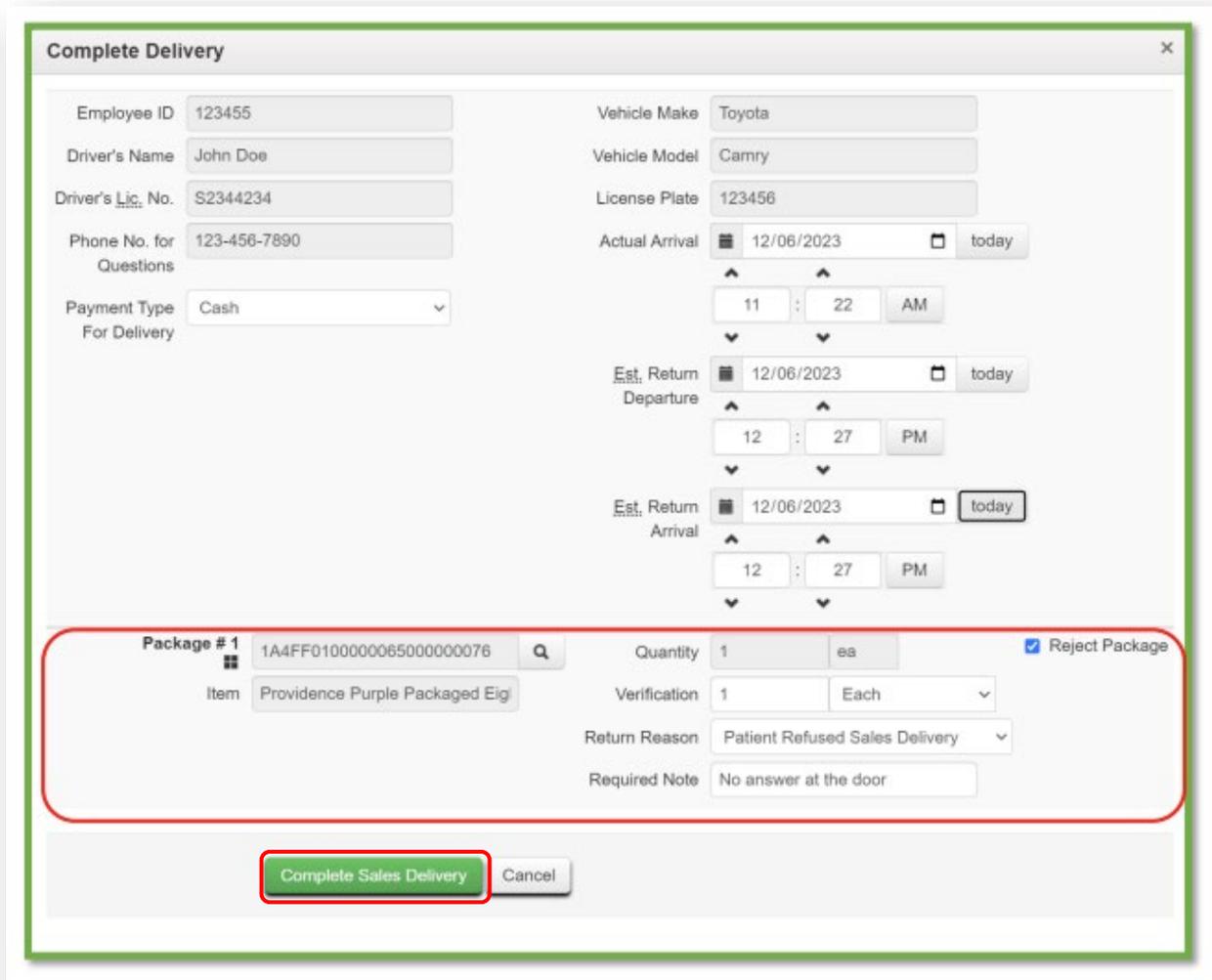


Figure 12: Complete Delivery action window with Reject Package

After completing the Sales Delivery, the delivery will be finalized and automatically moved to the Inactive tab in the Sales Deliveries grid – see **Figure 13**.

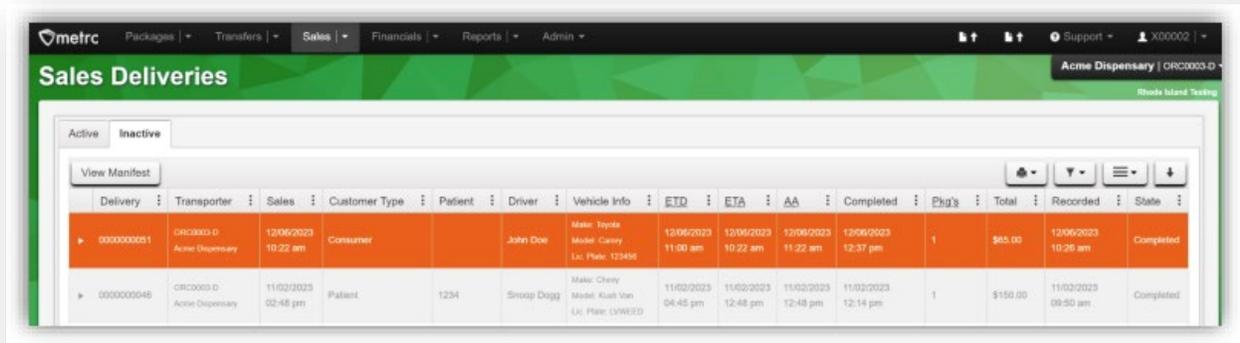


Figure 13: Inactive tab with completed Sales Deliveries

Notes about Delivery Sales via POS System

It is the responsibility of Adult Use Retailers using a third-party point-of-sale system (POS) to ensure Sales Receipts and Sales Deliveries are being registered appropriately.

To view all sales transactions, navigate to the Reports area on the navigational toolbar and select the Control Panel dropdown option. Once on the Report Control Panel page, select Sales filter from the filter options – see **Figure 14**.

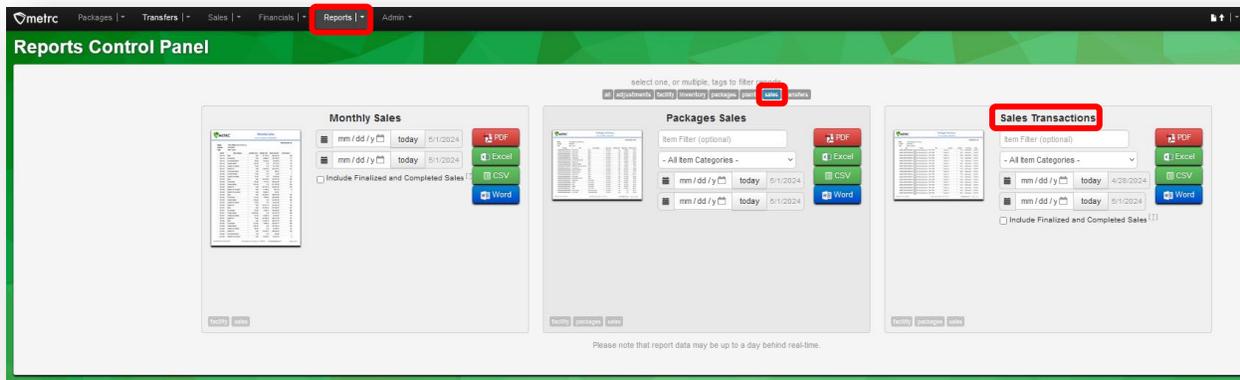


Figure 14: Sales Transactions in Reports Control Panel

Find the Sales Transactions Report. Designate a date range for the Sales Transactions report. (No Filters or Item Categories need to be chosen.) To see all Sales Transactions, including Finalized and Completed Sales, select the checkbox. Then select the button that correlates with the preferred format: PDF, Excel, CSV, or Word to download the report – see **Figure 15**.

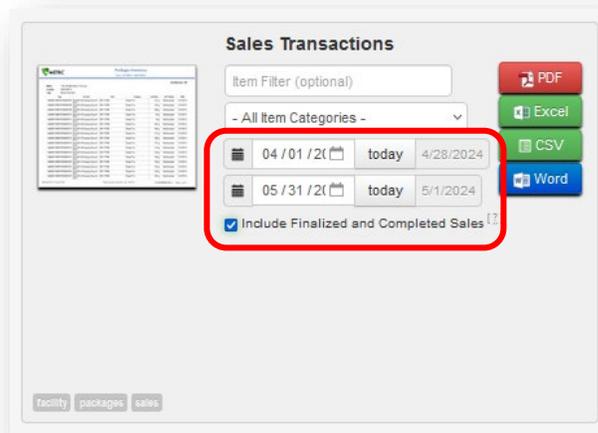


Figure 15: Sales Transactions Options

Once the report has been downloaded, review the Sales No. column to identify that each transaction is displayed as the correct type.

- **Delivery** = Delivery Sale
- **Receipt** = In-Store Sale

In this example, the Sales Transactions report was downloaded in PDF format – see **Figure 16**.

metrc		Sales Transactions							
		From 4/1/2024 To 5/31/2024							
Name		Acme Dispensary							
License		CRC0003-D							
Type		Adult Use Retailer							
									Total Records: 7
Sales No.	Date/Time	Customer	Amount	Package	Item	Category	Quantity	Price	Item Info
Delivery 000000036	5/1/2024 1:52 PM	Type: Consumer	\$80.00	1A4FF01000000C9000000001	Metrc Bliss - Buds	Bud/Flower	7 g	\$80.00	
Delivery 000000031	4/30/2024 4:36 PM	Type: Consumer	\$65.00	1A4FF01000000C9000000007	Metrc Bliss - Buds	Bud/Flower	5 g	\$65.00	
Receipt 000000086	4/19/2024 1:51 PM	Type: Consumer	\$50.00	1A4FF01000000C9000000017	Rowdy Roadshow - Buds	Bud/Flower	3.5 g	\$50.00	
Receipt 000000081	4/17/2024 1:21 PM	Type: Consumer	\$6.00	1A4FF01000000CA000000013	Brownies 40mg	Edibles	1 ea	\$6.00	THC 40 mg
Delivery 000000026	4/17/2024 9:49 AM	Type: Consumer	\$25.00	1A4FF01000000C9000000017	Rowdy Roadshow - Buds	Bud/Flower	1 g	\$25.00	
Delivery 000000021	4/12/2024 11:00 AM	Type: Consumer	\$20.00	1A4FF01000000C9000000017	Rowdy Roadshow - Buds	Bud/Flower	7 g	\$20.00	
Delivery 000000016	4/11/2024 10:51 AM	Type: Consumer	\$55.00	1A4FF01000000C9000000017	Rowdy Roadshow - Buds	Bud/Flower	1 g	\$55.00	

Figure 16: Sales Transactions Report PDF with Sales No. Column

If Delivery Sales are identified as being registered incorrectly as Receipt Sales when processed through the POS System, please contact the POS vendor's support team or Metrc Support.

Metrc resources

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

Contact Metrc Support by using the new full-service system by navigating to [Support.Metrc.com](https://support.metrc.com), or from the Metrc System, click Support and navigate to support.metrc.com and it will redirect to the portal.

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state and "Facility license number", and a valid email to set a password are required.

Metrc Learn

Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new [Metrc Learn](#) LMS is simple through multiple convenient locations:

From within the Metrc system

Navigate to the drop-down Support menu in the navigational toolbar and select "Sign up for Training" to register.

From the Metrc website

Navigate to your [state's partner page](#) and scroll down to the "Metrc's Training Resources" section to find the link.

Also, save the link – *learn.metrc.com* – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

Access additional resources

In the Metrc system, click on the Support area dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manuals, and more.