

Bulletin Number: State_IB_0013	Distribution Date: 8/15/19	Effective Date: 8/12/19
Contact Point: Metrc® Support	Subject: New Features in Metrc, Finalizing Sales Receipts and CSV Upload Restrictions	
Reason: Metrc is providing an update on our most recent feature release for discontinuing harvest waste in the system. Metrc also is reminding licensees on the importance of finalizing sales receipts along with a new limitation set on CSV row counts.		

Greetings Metrc Users,


Metrc is pleased to provide information on our newest enhancements within the software. Users with plant permissions will now have the ability to take corrective action on incorrect harvest waste entries by discontinuing the waste back into the harvest batch. The transfer manifest will now have item specific details and source package information for each package where applicable.

Metrc would like to provide further guidance on finalizing sales receipts. It is recommended that users who report sales into the system finalize receipts in Metrc periodically. Finalizing the receipts will improve system performance in the sales receipts area and decrease the editing times for receipts if your active receipt total exceeds 50,000. This functionality which was released in August 2018 is similar to the active/inactive area for packages.

Metrc has also now implemented row count restrictions on CSV uploads into the system.

Please find on the following pages a detailed description of the enhancements:

New Button: Discontinue Harvest Waste

When drilling down into a harvest batch, users can now toggle to the Waste tab and find a new discontinue () button next to each waste entry as seen in **Figure 1**. Once the discontinue button is selected, a confirmation box (**Figure 2**) will populate for the user to confirm the action. When the OK button is selected, the waste entry is removed, and the waste weight is added back into the weight of the harvest batch.

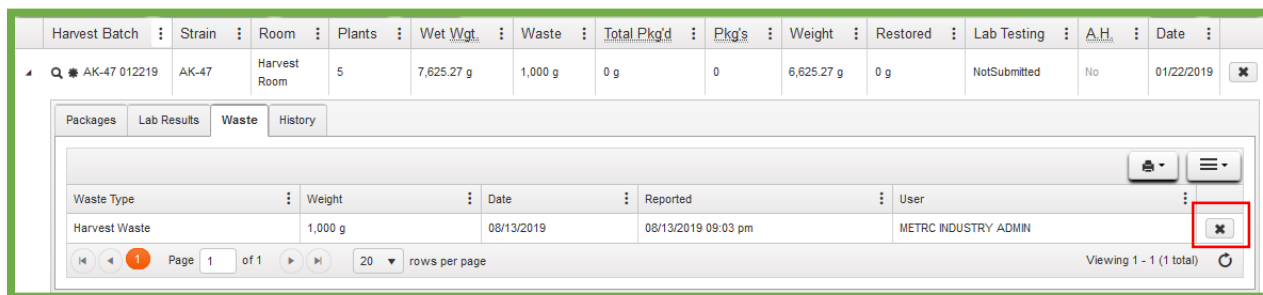


Figure 1: Discontinuing Harvest Waste

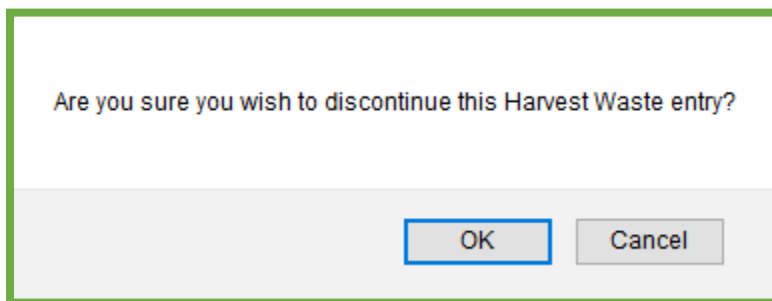


Figure 2: Confirming Discontinuation of Harvest Waste

Additional Information: Transfer Manifests

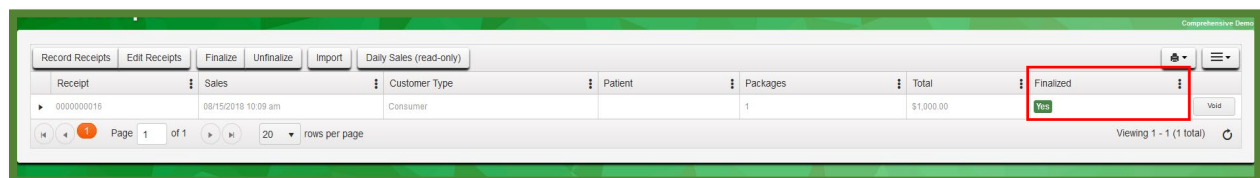
When registering and receiving transfers, users will now see that the Transfer Manifest provides additional information about the packages included on the manifest. Each package now includes the item details (Strain, Unit Weight, Unit THC Content, etc.) and source package information.

Package # 1	Production Batch No.	Item Name	Quantity
ABCDEF012345670000015892 Lab Test: TestPassed Status: Accepted		Buds (Buds)	Shp: 300.0000 g Rcv: 300.0000 g GWT: 5025.0000 g
Item Details	Strain: Kayote Blu		
Source Harvest(s)	Kayote Blu Harvest 6/3		
Source Package(s)	ABCDEF012345670000015891		

Figure 3: Additional Details on Transfer Manifest

Sales Receipt Finalize and Unfinalize Buttons

The Sales Receipt section of Metrc was previously updated to include two new buttons: Finalize and Unfinalize. A new Finalized column (filterable) has been added to the Sales Receipt grid as well.



The screenshot shows the 'Sales' tab in the Metrc interface. At the top, there are buttons for 'Record Receipts', 'Edit Receipts', 'Finalize', 'Unfinalize', 'Import', and 'Daily Sales (read-only)'. Below these is a table with columns: Receipt, Sales, Customer Type, Patient, Packages, Total, Finalized, and Void. A red box highlights the 'Finalized' column, which contains a green 'Yes' button. The first row of data shows a receipt number '0000000015', a date '08/15/2019 10:09 am', a customer type of 'Consumer', 1 package, a total of '\$1,000.00', and a 'Yes' in the 'Finalized' column. The bottom of the screen shows pagination: 'Page 1 of 1', '20 rows per page', and 'Viewing 1 - 1 (1 total)'.

Figure 4: New Finalized Sales Receipt Field

When a receipt is no longer active, select the receipt and click the Finalize button. The following window will appear. Verify the receipt number and click the “Finalize Sales Receipts” button. **Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing. Larger stores may want to Finalize older Sales Receipts at a faster pace (e.g. on a weekly basis).**

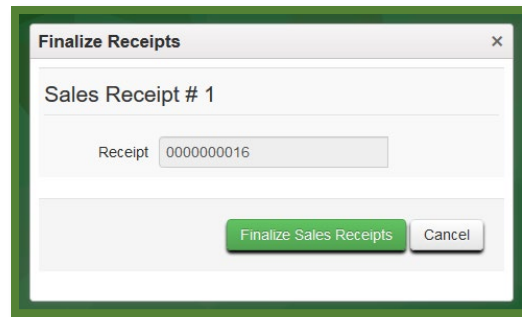


Figure 5: Finalize Sales Receipt Action Window

Finalizing sales receipts will remove the receipt from the list of active receipts Metrc pulls when you edit receipts, which will improve system performance. **Note: *Only those receipts not marked as “finalized” will display in the edit receipts window.***

If a “finalized” receipt later needs to be edited, utilize the Unfinalize button on the Sales Receipts grid. Select the desired receipt and click the Unfinalize button. The following window will appear. Verify the receipt number and click the “Unfinalize Sales Receipts” button.

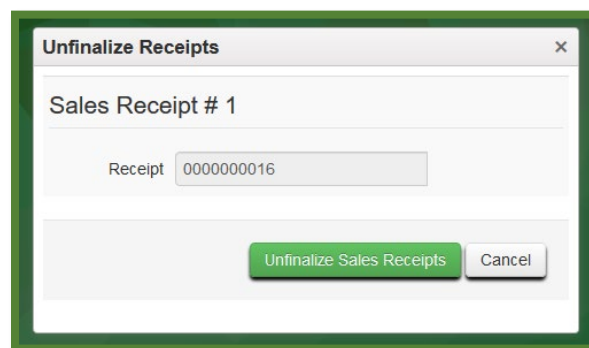


Figure 6: Unfinalize Sales Receipt

Finalizing Multiple Receipts

Industry users can select multiple receipts and finish them at one time. To do this click and drag to select multiple receipts, then select the finalize button.

Active

Inactive

Record Receipts

Edit Receipts

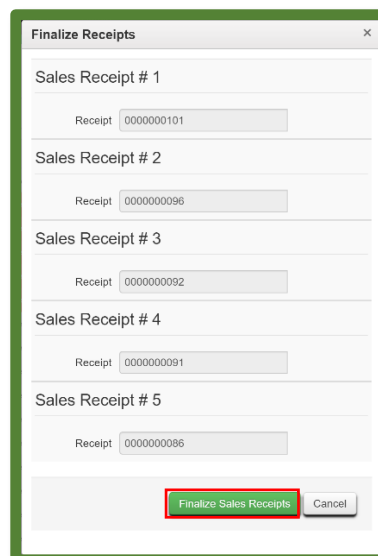
Finalize

Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized	
▶ 0000000101	05/03/2019 01:09 pm	Consumer		1	\$10.00	05/03/2019 03:13 pm	No	<div>Void</div>
▶ 0000000096	05/03/2019 09:21 am	Consumer		1	\$10.00	05/03/2019 11:25 am	No	<div>Void</div>
▶ 0000000092	05/01/2019 01:55 pm	Consumer		1	\$10.00	05/01/2019 03:58 pm	No	<div>Void</div>
▶ 0000000091	05/01/2019 01:49 pm	Consumer		1	\$20.00	05/01/2019 03:53 pm	No	<div>Void</div>
▶ 0000000086	04/25/2019 12:40 pm	Consumer		1	\$10.00	04/25/2019 02:44 pm	No	<div>Void</div>

Figure 7: Highlight Multiple Receipts for Finalization

Note: When finalizing multiple sales receipts at once, an industry user should limit the process to 100 receipts at a time.

This will prompt an action window where the industry user will confirm the receipt finish dates and select the “Finalize Sales Receipts” button to complete the finalization.



Finalize Receipts

Sales Receipt # 1
Receipt: 0000000101

Sales Receipt # 2
Receipt: 0000000096

Sales Receipt # 3
Receipt: 0000000092

Sales Receipt # 4
Receipt: 0000000091

Sales Receipt # 5
Receipt: 0000000086

Finalize Sales Receipts Cancel

Figure 8: Finalize Multiple Sales Receipts

System Restrictions: CSV Row Count

Metrc processes all records in a CSV file as a single upload transaction. Before storing any data, Metrc reviews each record to make sure there are no errors (such as a data type mismatch or the wrong number of values). If any record in the file generates an error, the upload is rejected. Metrc will report each error and the row on which it occurred. The user must then modify the CSV file and retry.

With this information in mind, Metrc has implemented a restriction of 500 rows maximum for each CSV file uploaded into the system. If this maximum is exceeded, the data can be split into separate files that do not exceed the 500-row maximum.

The exception made at this time will be for lab test results. There is currently no maximum limit set for the lab results being uploaded via the CSV import.

This limitation applies only to CSV imports and does not apply to data interfaced through API.

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.