

Metrc Support Bulletin



Bulletin Number: OH_IB_014	Distribution Date: 9/3/19	Effective Date: Ongoing
Contact Point: Metrc® Support	Subject: Finalizing Sales Receipts	
Reason: Metrc is providing additional guidance on finalizing sales receipts in order to improve system performance.		

Greetings Metrc Users,

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.

Please see the following pages for more details on how to finalize sales receipts.

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.



Figure 1: 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When a receipt is no longer active, select the receipt and click the Finalize button.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 **Note: A receipt should be considered “no longer active” once it becomes unlikely that it will need editing.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).**

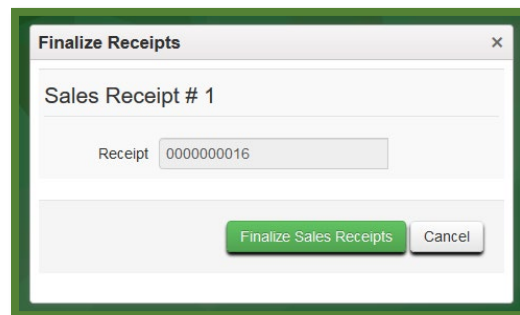


Figure 2: Finalize Sales Receipt Action Window

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.

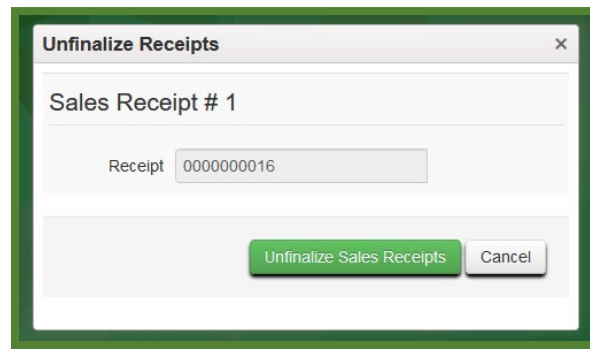
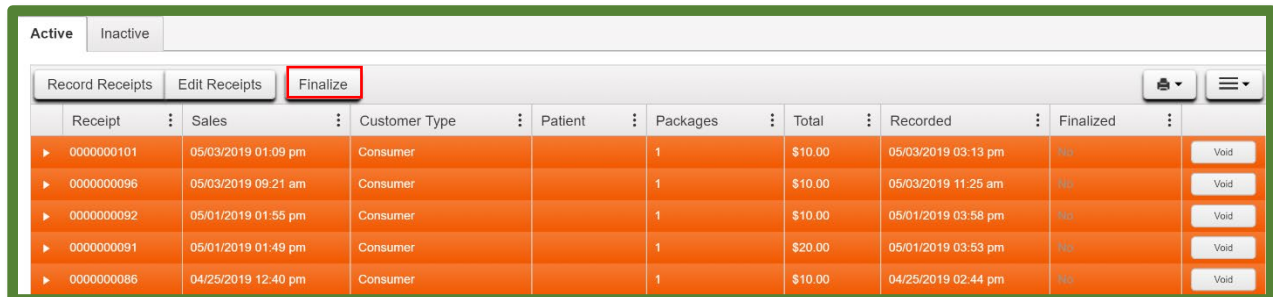


Figure 3: Unfinalize Sales Receipt

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.

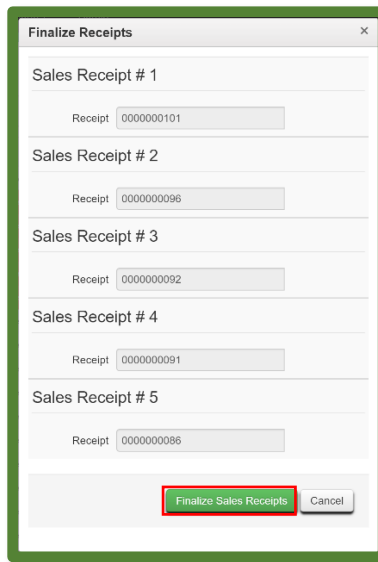


Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized	
▶ 0000000101	05/03/2019 01:09 pm	Consumer		1	\$10.00	05/03/2019 03:13 pm	No	Void
▶ 0000000096	05/03/2019 09:21 am	Consumer		1	\$10.00	05/03/2019 11:25 am	No	Void
▶ 0000000092	05/01/2019 01:55 pm	Consumer		1	\$10.00	05/01/2019 03:58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

Figure 4: 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 000000101

Sales Receipt # 2

Receipt 000000096

Sales Receipt # 3

Receipt 000000092

Sales Receipt # 4

Receipt 000000091

Sales Receipt # 5

Receipt 000000086

Finalize Sales Receipts Cancel

Figure 5: Finalize Multiple Sales Receipts

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