

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 r	egarding home delivery and ho	ow to register delivery sales in

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 <u>crc.compliance@crc.nj.gov</u> 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 <u>off the licensed premises</u> is reported as a **Sales Delivery.**
- Any transaction that takes place <u>on the licensed premises</u> 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**.

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Last Name	First Name	E Items
Beaven	Elizabeth	Transporters
		Employees
	ployees Lock Unlock Last Name : Beaven	ployees Lock Unlock E Last Name Elizabeth

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**.

mployees					
Add Employees Ec	lit Emplo	oyees Lock Unlock			
License No.	:	Last Name	:	First Name	E-mail
X00420		INDUSTRY ADMIN		METRC	support@metrc.com
X00002		Johnson		Mary	miguel.lopez@metrc.com

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.

mployee #	# 1				(clear)
Employee	Mary Johnson 🗸	Permissions	Packages Page		Acme Cultivator ORC0001-G
Employee Lic.	X00002		Grids (reg'd)	View	Acme Dispensary ORC0003-D
Number	AUGULE .		Inventory	Manage	Acme Processor ORC0002-P
	2.2.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1		Create/Submit/Disc,	Manage	Acme Testing Lab ORC0004-L
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			Licensed & External	Manage	
Home	Packages ~		Templates	Manage	
Employment	Owner at this Facility		Hub	Manage	
Cardina Constant	Manager at this Facility	(Sales Menu		
	Bud Tender		Sales	Manage	
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		1	Hub 🗹 Manage)	x
			Trips Menu		
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			Financials Menu		
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			Tag Orders	Manage	
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+ 1					
	Save Employees Cancel	1			

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**.

Active Inactive			
Record Deliveries Edit De	liveries View Manifest		
Delivery :	Transporter :	Sales :	Customer Type
▶ 000000031	ORC0003-D Acme Dispensary	11/02/2023 03:30 pm	Consumer
▶ 0000000017	ORC0003-D Acme Dispensary	11/02/2023 10:00 am	Consumer
H 4 1 Page 1	of 1 + + 20	 rows per page 	





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 <u>NJ Industry Bulletin 0006</u>.

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.

 04/30/2024 04/30/2024 				
▲ ▲		today	Consumer Id	
0.4 - 20			Name	
V V	PM		(optional)	
04/30/2024		today	Est. Arrival	🗰 04/30/2024 🛗 today
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			Address	
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			State + Zip	
Type part of the Di	river Name	Q (clear)	Vehicle 1	Type part of the vehicle make, moc Q
			Vehicle Make	
			Vehicle Model	
			License Plate	
ex. +1-123-456-78	90			
Package # 1	Type part o	f Package number	Q (clear)	Quantity ex. 100.23 - Select -
Available	N/A			Total Price S ex. 100.23
	04/30/2024 04/20/2024 04/20/2024 04/20/2024 12/20 1	04/30/2024 04 29 PM 29 PM 7	O4/ 30/2024 today O4 : 29 PM V V Type part of the Driver Name C Cosy cosy	O4/30/2024 today Est, Arrival O4 : 29 PM Address Address Address Address Conty Comy Comy

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**.

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 B Page 1 eff (* #) 23 * novis per page Verving 1-2 (2.tbal) 	Viewing 1 - 2 (2 total) Ö 🕇											page	20 • rows per	e 1 of 1 (F) (H	🔹 🚺 Pag

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.**

es Deliver	ries	Edit Deliveries									×
tive Inactive		Sales Delive	n # 000000	0031							(clear)
Record Deliveries E	Edit Deliveries View Manifes	st Date/Time	04/30/2024	toda;	y	Consumer Id	Receipt # 0000000031				
Delivery	: Transporter	: Sales	04 : 3	РМ		Name (optional)					
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• 1 Page	e 1 of 1 🕨 🖬	20 v rov Planned Route	Turn Left			Address	123 Street				
			Turn Right Arrive			Address Cont.					
						City	Anytown				
					11.	County (optional)	Camden				
						State + Zip	NJ ~ 08104				
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		Employee ID	Doe			Vehicle Make	Jeep				
		Driver's Name	John			Vehicle Model	Cherokee				
		Driver's Lic. No.	XYZ555			License Plate	ABC123				
		Phone No. for Questions	555-555-5555								
			Package # 1	1A4FF01000000CS	000000007	Q (Stast)	Quantity	5	Grams	×	
			Available	284.3 g			Total Price	\$ 65			
		► Tra	saction Details								
		O (nac)	anel								
		+ 1 0									
			Updat	sales Deliveries	ancel						

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**.

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1	u x 🚺	Page 1 of 1	нн	20 • rows per	page								Viewin	ig 1 - 3 (3 total)	0 +

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**.

Employee ID	123455	5			Vehicle Make	Toy	ota					
Driver's Name	John D	oe			Vehicle Model	Ca	mry					
Driver's <u>Lic.</u> No.	S23442	234			License Plate	12:	3456					
Phone No. for	123-45	6-7890			Actual Arrival		12/06	2023			today	
Questions						^)	^				
Payment Type	Cash	~					11 :	22	2	AM		
For Delivery						*		*				
Package # *		1A4FF01000006500000	0076	۹	Quantity	1		e	a		eject Pack	age
	Item	Providence Purple Packag	ged Eigl									
		Complete Sales Deliver	ry Ca	ancel								

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**.

Employee ib	123455				Vehicle Make	Toy	ota					
Driver's Name	John D	08			Vehicle Model	Car	nry					
river's <u>Lic.</u> No.	S23442	234			License Plate	123	456					
Phone No. for	123-45	6-7890			Actual Arrival	=	12/0	6/202	23	۵	today	
Questions						^		-	•	1		
Payment Type For Delivery	Cash	~					11	1	22	AM		
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					Return Reason	Pa	tient P	Refus	ed Sal	les Delivery	· •	
					Required Note	No	answ	er at t	the do	or		
					<i>.</i>							
		Complete Sales Deliver	y Car	ncel								

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**.

a	les Deliv	veries												Acme Dispe	nsary ORC0003-D
														and the second second	Rhode bland Testing
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			12/06/2023 10:22 am				Make: Toyota Model: Carwy Lic. Plate: 123450	12/06/2023 11:00 am	12/06/2023 10:22 am	12/06/2023 11:22 am	12/06/2023 12:37 pm			12/06/2023 10:26 am	Completed
	▶ 0000000046	ORCOOD-D Acte Depensary	11/02/2025 02:48 pm	Patient	1234	Sitoop Dogg	Make: Chevy Model: Kash Van Le: Place: UVWEFD	11/02/2023 04:45 pm	1002/2023 12:48.pm	11.02/2023 12:48 pm	11/02/2023 12:14 pm	4	\$150.00	11/02/2025 09:50 am	Completed

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**.

select one, or multiple, tages of there								
Monthy Sales	Packages Sales En Fate (spices) - All tem Catogeris- - All tem Catogeris- - Min Mid 1/2 today \$rizo24 - min/dd 1/2 today \$rizo24 - min/dd 1/2 today \$rizo24	Sales Transactions Tem Fair (plona) At tem Categories - Constructions At tem Categories - Constructions At tem Categories - Constructions (Constructions)						
teats and		Testity persegue and						

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**.

Netec Astantisment	Item Filter (optional	Item Filter (optional)			
Distant Distant <t< th=""><th>- All Item Categorie</th><th colspan="2" rowspan="2">- All Item Categories - V</th><th colspan="2">I) Excel</th></t<>	- All Item Categorie	- All Item Categories - V		I) Excel	
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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.

©me [∙]	Sales Transactions From 4/1/2024 To 5/31/2024								
Name License Type	Acme I CRC00 Adult U)ispensary 03-D se Retailer							Total Records: 7
Sales No.	Date/Time	Customer	Amount	Package	ltem	Category	Quantity	Price	item info
Delivery 000000036	5/1/2024 1:52 PM	Type: Consumer	\$80.00	1A4FF0100000C900000001	Metrc Bliss - Buds	Bud/Flower	7 g	\$80.00	
Delivery 0000000031	4/30/2024 4:36 PM	Type: Consumer	\$65.00	1A4FF0100000C900000007	Metrc Bliss - Buds	Bud/Flower	5 g	\$65.00	
Receipt 000000086	4/19/2024 1:51 PM	Type: Consumer	\$50.00	1A4FF0100000C900000017	Rowdy Roadshow - Buds	Bud/Flower	3.5 g	\$50.00	
Receipt 000000081	4/17/2024 1:21 PM	Type: Consumer	\$6.00	1A4FF0100000CA00000013	Brownies 40mg	Edibles	1 ea	\$6.00	THC 40 mg
Dolivory	4/17/2024 9:49 AM	Type: Consumer	\$25.00	1A4FF0100000C900000017	Rowdy Roadshow - Buds	Bud/Flower	1 g	\$25.00	
0000000026	3.43 MIVI						-	£20.00	
0000000026 Delivery 0000000021	4/12/2024 11:00 AM	Type: Consumer	\$20.00	1A4FF0100000C900000017	Rowdy Roadshow - Buds	Bud/Flower	/ g	\$20.00	

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 <u>Support.Metrc.com</u>, 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 <u>state's partner page</u> 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.