Metrc Support Bulletin

Bulletin Number: MN_IB_0026	**Distribution Date:** 07/25/2024	**Effective Date:** Ongoing
Contact Point: Metrc Support	**Subject:** Editing Sales Receipts	
Reason: To educate industry on editable fields within sales receipts, as well as best practices		

Greetings,

The process for editing Sales Receipts is explained in the bulletin below, including information within the Sales Receipt that can be edited. This process should be used when there are inaccuracies found within a Sales Receipt.

Once edits have been made within Metrc, it is strongly recommended the same adjustments are made within your POS following the appropriate standard operating procedures (SOP). Please check with your POS provider on whether adjustments within their software will affect data in Metrc before editing Sales Receipts.

Editing Sales Receipts

Access the Sales Receipts grid by going to the Sales area on the navigational toolbar and select the Receipts option from the dropdown – **see Figure 1**.
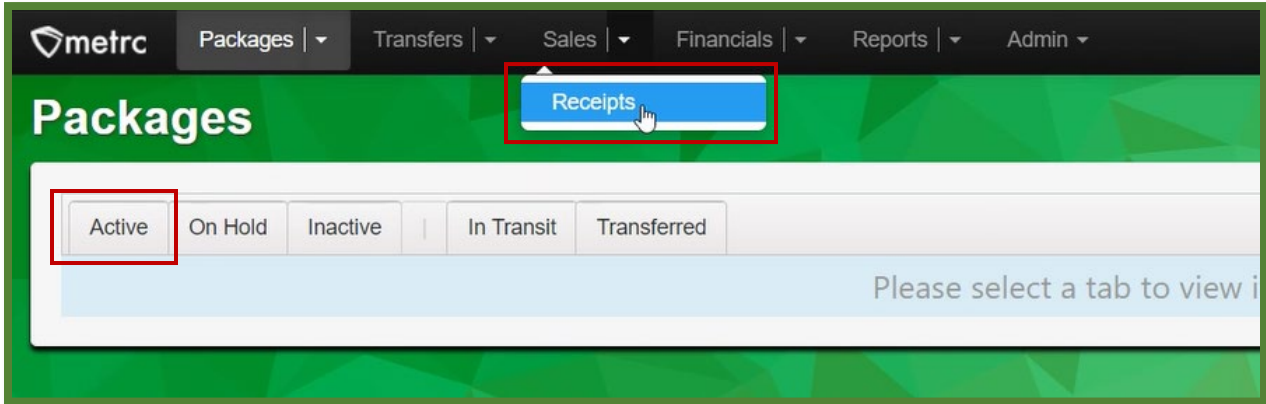

Figure 1: Sales Receipts option

Select the Active tab, then choose the Sales Receipt that needs to be edited. Then click the Edit Receipts button – **see Figure 2**.
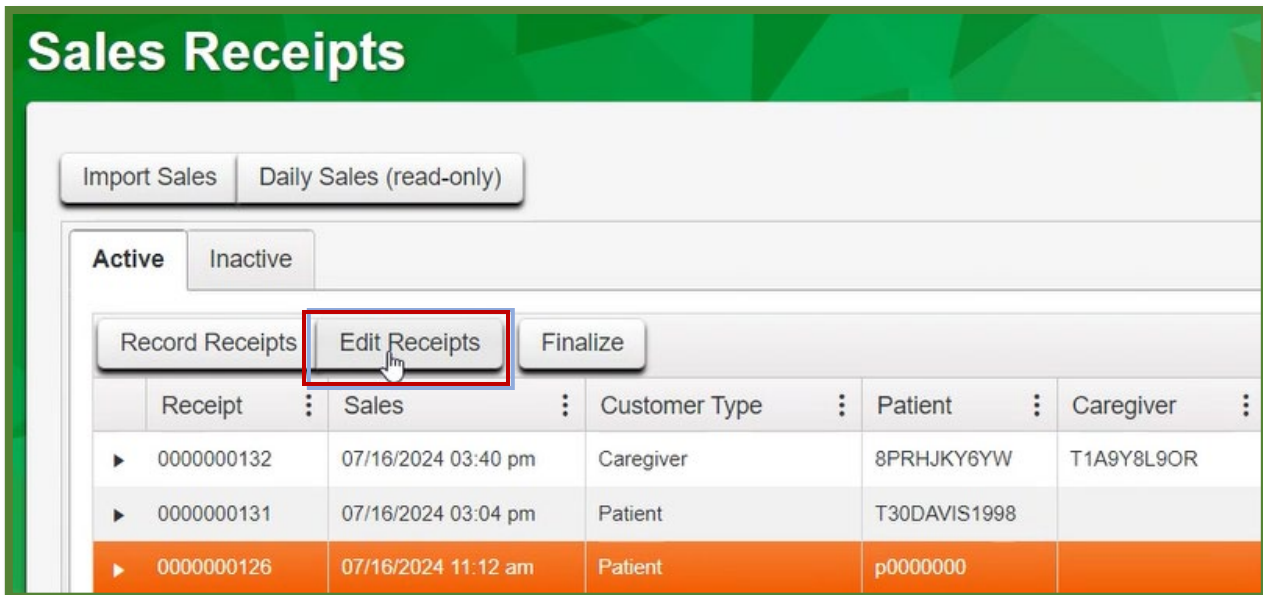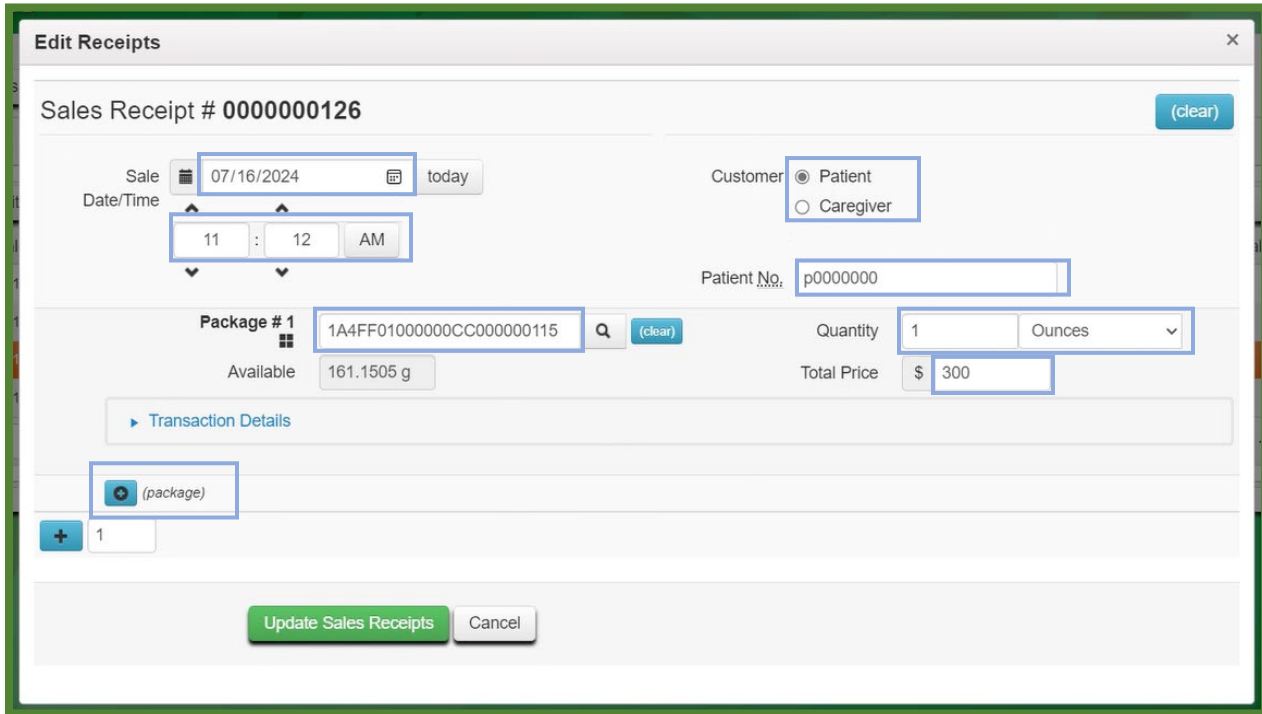

Figure 2: Edit Receipts button

Editing the Sales Receipt

From the Edit Receipts action window, edit all fields that need to be updated – **see Figure 3.**

Figure 3: Editable Fields on Sales Receipt

The following shows the editable fields as well as some reasoning as to why those fields may need editing:

Sale Date/Time

- If a sale was made with the incorrect date and time of sale, this field can be edited to reflect the correct Sale Date/Time.

Customer Patient/Caregiver

- If an incorrect Patient Number was entered into Metrc, this field can be edited to reflect the correct Patient Number.
- If the sale was made to a Caregiver, this field can be added to the Sales Receipt to correctly reflect the Caregiver information.

Package/Quantity/UoM/Price

- If the incorrect package was sold out, this field can be edited to select the correct package tag. It is important to update the Sales Receipt instead of adjusting inventory. If there is a recall and the Sales Receipt does not reflect the correct package, there could be downstream implications for recalling the incorrect product, including risks to public health and safety as the actual recalled product will still be in market.
- If the incorrect quantity is entered, then this field can be edited to reflect the correct quantity.
- If the incorrect Unit of Measure (UoM) was listed for the product sold, then this field can be edited to correct the unit of measure.
- If the price does not match the price that the patient or caregiver was charged, then the price field can be edited to correct the price.
- Packages can also be added to the Sales Receipt if needed.
- Please note when a receipt is edited, there is no need to make adjustments to the package on the Packages tab.

Once all fields have been edited as needed, then click the Update Sales Receipts button to complete the editing process – **see Figure 4**.

Figure 4: Fully Revised Sales Receipt

Once the Sales Receipt has been edited, it can be viewed on the Sales Receipts grid. The history of the edits can be viewed by selecting the drill down arrow to the left of the receipt that was edited – **see Figure 5**.

Figure 5: Edited Sales Receipt in Sales Receipts Table

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, 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 Support area on 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.

Thank you for your continued partnership.