

# Sales

## Entering Sales at the Dispensaries

Only Dispensaries send Sales information in the system. Recording Sales in Metrc is "reporting the last event in chain of custody" in this Seed-to-Sale tracking software.

Sales may be entered two (2) ways:

1. Manually
2. Data Import - via .csv file upload or through the API from a Third Party Vendor that has completed the certification process with Metrc and the State.

Sales must be entered into Metrc daily on the day sales are made using the "Record Receipts" button for manual entries, or the "Import" button for CSV uploads.

## Manually Entering Sales

The screenshot shows the 'Record Receipts' form with the following fields and callouts:

- 1: Sale Date/Time (mm/dd/yyyy)
- 2: Time of Sale (03:15 PM)
- 3: Package # 1
- 4: Available (N/A)
- 5: Package # 1 (Type part of Package number.)
- 6: (+) button
- 7: (+) button
- 8: Customer (Consumer/Patient)
- 9: Patient No.
- 10: Quantity (pk 100.2)
- 11: (- Select -) dropdown
- 12: Total Price (\$ pk 100.2)
- 13: Record Sales Receipts button
- 14: Cancel button
- 15: (clear) button

### Item 1: Receipt Date

The date of purchase from the receipt.

### Item 2: Time of Sale

The Time of Sale in hours and minutes.

**Item 3: Time of Day**

Identifies whether the sale occurred in the am or pm hours.

**Item 4: Package Number**

Package(s) from which product was distributed to the Patient.

**Item 5: Availability**

Displays how much product remains in the existing Metric package.

**Item 6: Add Package button**

Use to add additional package information.

**Item 7: Add button**

Use to populate information from a separate Sales Receipt while on the same screen.

**Item 8: Customer button**

Identifies whether the customer was a retail consumer or a Patient.

**Item 9: Patient Number**

The Patient Number of the person purchasing the product.

**Item 10: Quantity**

How much product the Patient purchased from the identified package(s).

**Item 11: Unit of Measure dropdown**

Select the Unit of Measure from the dropdown. The Unit of Measure must match the Unit of Measure of the source package(s).

**Item 12: Total Price**

Enter the Total Price for the product sold before tax and after any discounts.

**Item 13: Record Sales button**

Select Record Sales to save the information and exit the screen.

**Item 14: Cancel button**

Select to exit the screen without saving any changes.

## Item 15: Clear button

Select to clear all entered information.

You can use the "Edit Receipts" button to edit the date and time, customer/patient information, and package/sales details.

## Sales Data Import

You will need the ability to associate the Metrc package ID number to one or more sku items in your POS to import Sales data via the API.

If they do not participate in the API (see the API Third Party Vendor list of companies who are certified to use the API with Merc at [www.metrc.com](http://www.metrc.com)), your Point of Sales vendor can help you export a csv file from their system to your computer. You can then import that csv file into Metrc.

If your POS vendor participates in the API, they can push this data to the software automatically.

CSV - Comma Separated Variable file or Comma Delimited file

### To use the CSV upload:

A sales upload from a common file type is available from the Sales function within a Dispensary. The file will need to be a test file separated by commas, commonly called a CSV file. This type of file can be created from an excel worksheet. The image below shows where to select the file. Once you have selected sales, select the "Import" button shown below. You should be able to create a CSV file from your existing Point of Sale system.



A new screen will open. Select the "Sales (new)" button and select the file to upload.



Notes:

1. Please be sure to select the correct files before uploading
2. All uploaded files will be imported automatically
3. Once a file is uploaded, it cannot be removed
4. Once a file is imported, its data cannot be removed
5. Every single upload is tied to your current account and facility
6. Files are limited to 1MB (megabyte) in size

All files will be scanned by antivirus software