

Bulletin Number: RI_IB_0040	Distribution Date: 08/08/2025	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: External Patient Sales	
Reason: Guidance on how to record on site and delivery external patient sales.		

Greetings,

We are providing guidance on how to record sales for external patient sales. Employees at a Dispensary/Store with the "Manage" Sales Delivery permission can create and complete sales deliveries for eligible patients.

To record a Sales Delivery for eligible external patients, the identification method needs to be valid, and meet these criteria:

- An out-of-state, non-expired medical marijuana card.
- An additional non-expired government-issued photo ID that corresponds to the state mentioned on the medical marijuana card.

Please refer to the Cannabis Control Commission's rules and regulations for other forms of documentation that may be allowed.

Please review the next steps for recording a manual receipt for an External patient.

Recording Onsite Sales in Metrc

Individual sales receipts are required to document all *onsite* sales transactions. Metrc automatically assigns a unique sales receipt number to each transaction.

The following options are the steps to complete each sales function.

Create a New Sales Receipt for External Patient

To record a sales receipt in Metrc, you have three reporting options, manual entry, CSV file upload, or through a third-party integrator using an API. Please review the information below regarding how to report sales by manual entry.

Steps to Record a Manual Receipt for a Consumer

1. Access the "Sales" area on the navigational toolbar.
2. Select the "Receipts" option from the drop-down menu.
3. Select the "Active" tab for a list of all active receipts.
4. Click the "Record Receipts" button.
5. Complete all required fields in the "Record Receipts" action window. Select the "Consumer" option from the "Customer" list.
6. Select "external patient" for the customer type.
7. Include the external patient's medical card license with the state abbreviation in the beginning of the patient license number, ex. MI-XXXXXXX - **see figure 1 below**.
8. Optionally, expand and complete the "Transaction Details" section for each package sold to allow for more accurate and detailed reporting of sales information.
9. Click the "Record Sales Receipts" button to create the sales receipt.

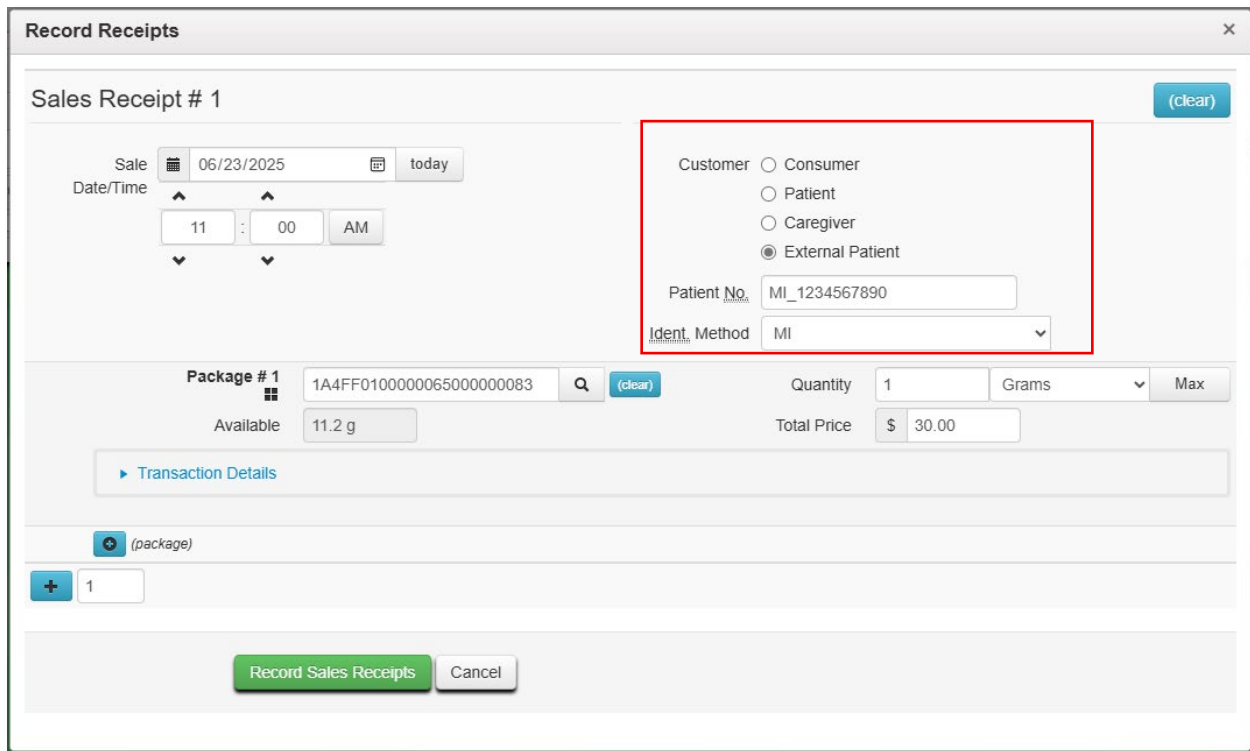


Figure 1: Recording a sales receipt for external patient

Steps to Record a New Sales Delivery for an External Patient

Employees at a Dispensary/Store with the "Manage" Sales Delivery permission can create and complete sales deliveries for eligible patients. Please follow the steps below to record a Sales Delivery.

1. Access the "Sales" area on the navigational toolbar.
2. Select the "Deliveries" option from the drop-down menu.
3. Choose the "Active" tab.
4. Click the "Record Deliveries" to generate a delivery manifest.
5. Complete all required fields in the "Record Deliveries" action window. Use the information below for guidance on completing these fields.
6. Click the "Record Sales Deliveries" button to record the delivery.

Please be aware that reporting a sales delivery as an in-store sales receipt will result in **duplicate reporting**.

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 – Service Cloud – by navigating to [Support.Metrc.com](https://support.metrc.com), or from the Metrc System, click the Support area dropdown on the navigational toolbar and click support.metrc.com to 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 was recently redesigned to offer interactive educational opportunities to enhance Metrc system users’ skills and provide various training options based on experience level.

In addition, the learning system is organized into facility-specific programs made up of various courses. To login or register for an account, visit [Metrc Learn](#).

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.

Thank you for your continued partnership.