

Bulletin Number: NY_IB_0019	Distribution Date: 07/02/2026	Effective Date: 07/22/2026
Subject: External Patient Sales – Reciprocity Workflow in Metrc		
Reason: To provide guidance on how to record on-site external patient sales.		

Greetings,

Metrc, in conjunction with the New York Office of Cannabis Management (OCM), are pleased to provide the following guidance on how to record sales for external patient sales (reciprocity sales).

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

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

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.

Create a New Sales Receipt for External Patient

Please note that API connections are available for 3rd Party integrators to be able to enable the ability for you to enter this information directly into your POS system with your typical workflow.

Please review the information below regarding how to manually record an External Patient Sales Receipt directly into Metrc.

Steps to Record a Manual Receipt for an External Patient:

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.
6. Select "external patient" for the customer type.
7. Include the external patient's medical card license with the state abbreviation at the beginning of the patient license number.
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.

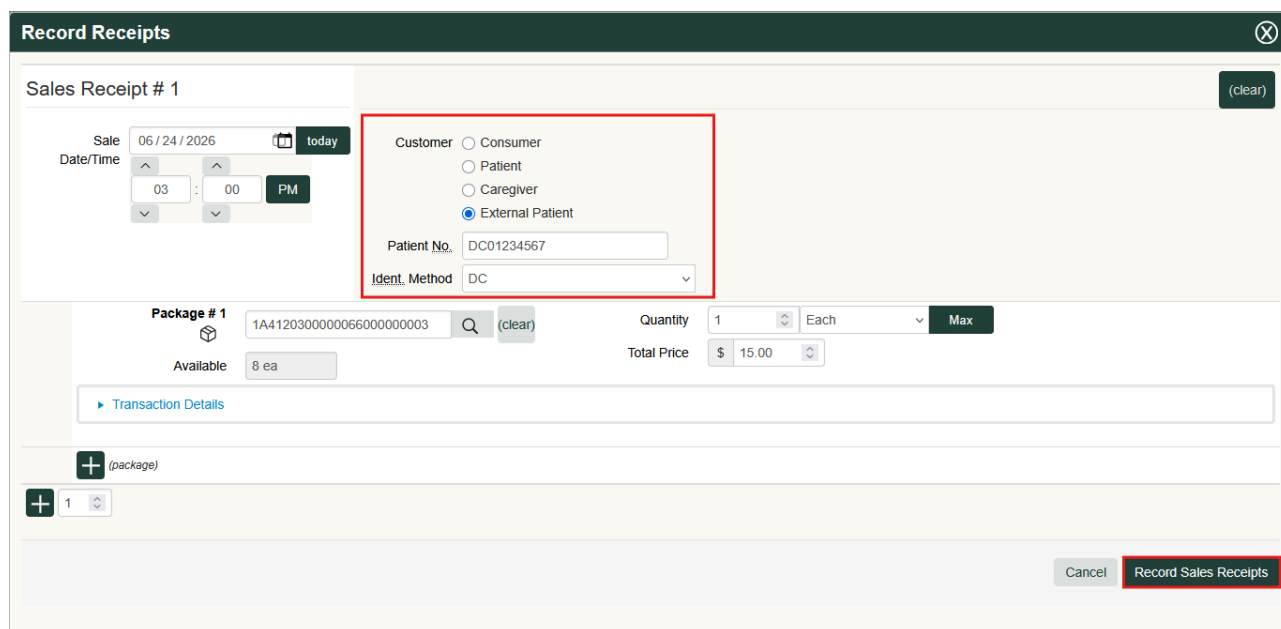


Figure 1: Recording a sales receipt for external patient

Web API Documentation

Sales

Server: <https://api-ny.metrc.com/>

GET /sales/v2/customertypes

Returns a list of customer types.

Permissions Required

None

Parameters

No parameters

Example Request

GET /sales/v2/customertypes

Example Response

```
[  
  "Consumer",  
  "Patient",  
  "Caregiver",  
  "ExternalPatient",  
  "NonResidentConsumer"  
]
```

Metrc Resources

If you need additional support, the following resources are available:

Metrc Support

You can submit and track a case via the [Support portal](#) or by calling 877-566-6506. Our team is available:

- Monday – Friday, 8 a.m. ET – 10 p.m. ET
- Saturday 10 a.m. – 8 p.m. ET
- Sunday – Voicemail or portal only

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state, “Facility license number”, and a valid email to set a password are required.

Metrc Learn

Our on-demand training platform provides users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Access [Metrc Learn](#) directly or via the Support drop-down in Metrc. If you have not yet registered for Metrc Learn, that will be your first step.

Metrc Expert

In the Metrc system, click on widget icon in the lower right-hand corner to open the Metrc Expert knowledge base to access step-by-step guides, ask questions, and more.

Metrc.com

Explore your [state’s partner page](#) for training links, FAQs, and more.

Thank you for your continued partnership.

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If you have any questions, or need additional support, please reach out to the Metrc API Support team at api-info@metrc.com.

Thank you for your continued partnership.