

Bulletin Number: NY_IB_0009	Distribution Date: 2/16/2026	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Trade/Vendor Sample Process and Transfer Type	
Reason: Guidance on utilizing the Trade/Vendor Sample functionality and registering a Trade Sample transfer.		

Greetings,

Metrc in collaboration with the Office of Cannabis Management is pleased to provide guidance on how to mark and transfer a trade/vendor sample.

Once a licensee has received trade sample packages and dispersed them to their employees, they will need to adjust those packages out of their active inventory.

Please find additional information below.

Trade Sample Toggle Button

- To designate a package as a trade or vendor sample, navigate to the Packages Grid
- Select the package you would like to be marked as a trade/vendor sample
- Select the Trade Sample drop down menu option.
- The carrot dropdown will show a Flag and Unflag selector. Select Flag to mark that entire package as a trade sample. See Image 1.
- The trade sample can be identified with a suitcase icon within the package window.

Important Note: Once a trade sample has been transferred to another facility, the trade sample indicator cannot be unflagged.

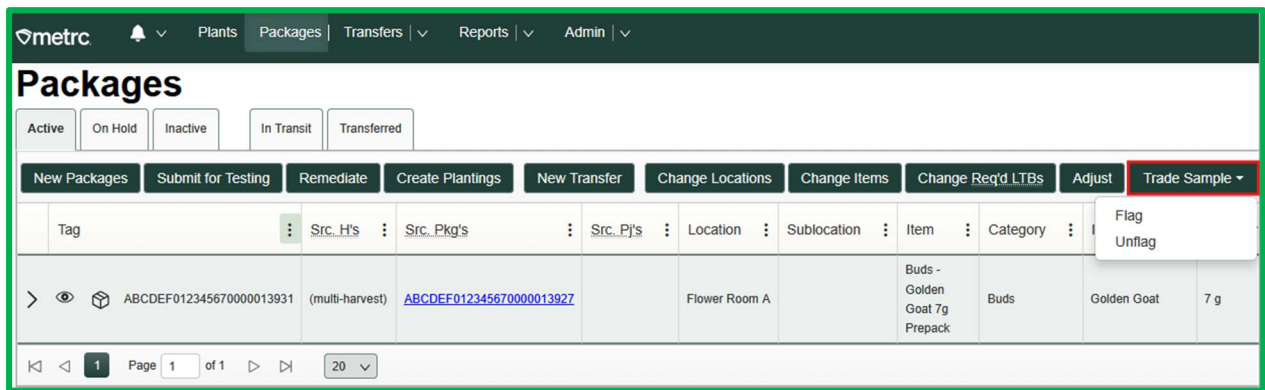


Image 1: Trade Sample Button

Trade/Vendor Sample Transfer Type

- Once a package has been marked as a Trade Sample, and is ready to be transferred to another facility, navigate to the packages grid and select the Active tab.
- Once you have identified the Trade Sample package you would like to send to another facility, select that package and then select New Transfer.
- In the New Transfer window, select Unaffiliated transfer type as the transfer type in the drop-down menu. See Image 2.
- Include all other required information for the transfer including the destination, planned route, departure and arrival times, and transporter information.
- Include \$0.01 for wholesale price of trade sample package.

- Select Register Transfer to complete the transfer action.

Image 2: Selecting the Unaffiliated Transfer Type and Price

Adjusting Trade Sample Packages in Metrc for Employee Sample

Any package that is marked as a “Trade Sample” and has been distributed to the appropriate employees, will need to be adjusted out of active inventory in Metrc. Please follow the steps below to accomplish this:

- Navigate to Packages > Active to find the trade sample package in question and select the “Adjust” action button. See Image 3:

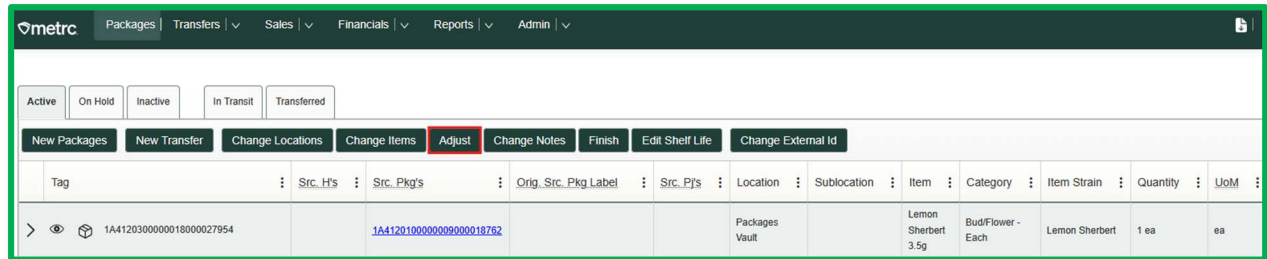






Image 3: Select the “Adjust” button


- In the Adjust Packages window, you can enter the amount that is being given as a trade sample (adjusted) in the “Adj. Quantity” field or enter the new amount after dispersing the trade sample in the “New Quantity” field below it.
- Select the “Employee Trade Sample” option from the drop-down next to the “Reason” field.
- In the “Required Note” field, enter the Employee’s First and Last Name that this trade sample went to.
- Enter the Adjustment Date.
- If this is the last of the package, select the “Finish Package” checkbox and enter the date the package was finished.

Please see image 4 below:

Adjust Packages ✕

Package # 1 (clear)

Package 	<input type="text" value="1A412030000018000027954"/> 	Reason	<input type="text" value="Employee Trade Sample"/>
Quantity	<input type="text" value="1"/> <input type="text" value="Each"/>	Required Note	<input type="text" value="Employee Name"/>
Adj. Quantity	<input type="text" value="-1"/> <input type="text" value="Each"/>	Adj. Date	<input type="text" value="01 / 23 / 2026"/>  today
New Quantity	<input type="text" value="0"/> <input type="text" value="Each"/>	<input checked="" type="checkbox"/> Finish Package	
Removing - new total will be 0 ea		Finish Date	<input type="text" value="01 / 23 / 2026"/>  today



Cancel Adjust Packages

Image 4: Adjust a Trade Sample Package

Industry 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.

TPI Metrc Resources

Metrc Resources

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