

<b>Bulletin Number:</b> NY_IB_0013	<b>Distribution Date:</b> 04/20/2026	<b>Effective Date:</b> 05/13/2026
<b>Subject:</b> Buyer’s Club Event Workflow for Licensees		
<b>Reason:</b> To provide step-by-step guidance for licensees on how to manage product movement and post-event reconciliation for Buyer’s Club events in Metrc.		

This bulletin outlines the workflow licensees must follow when participating in Buyer’s Club events, including how to prepare packages in Metrc, initiate transfers, and complete post-event reconciliation. Please read all steps carefully before initiating any transfers associated with a Buyer’s Club event.

### Overview

Metrc has introduced a dedicated transfer type for Buyer’s Club events to clearly distinguish this activity from standard transfers.

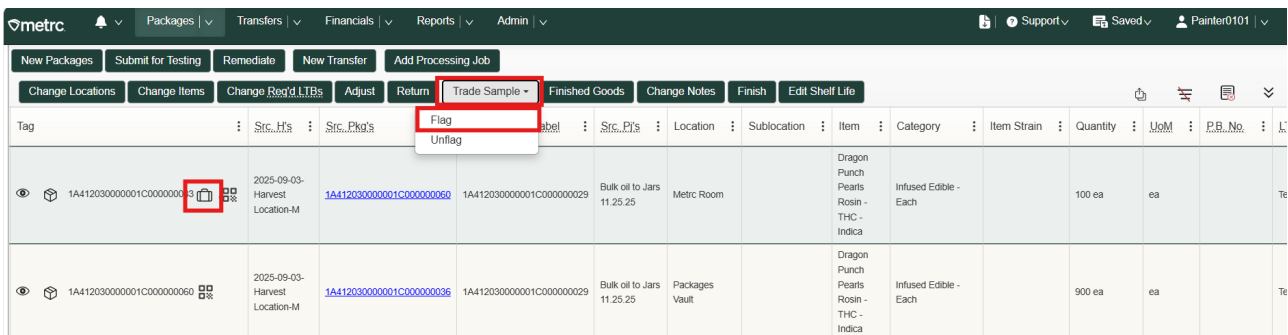
### Step-by-Step Workflow

#### Step 1: Designate Applicable Packages as Trade Samples

Prior to initiating any transfer, licensees must designate the applicable Package UID(s) as trade samples within the Packages grid. To do this:

1. Navigate to the **Packages** grid in Metrc.
2. Select the Package UID(s) intended for the Buyer’s Club event.
3. Apply the **Trade Sample** designation to each applicable package before proceeding to the next step.

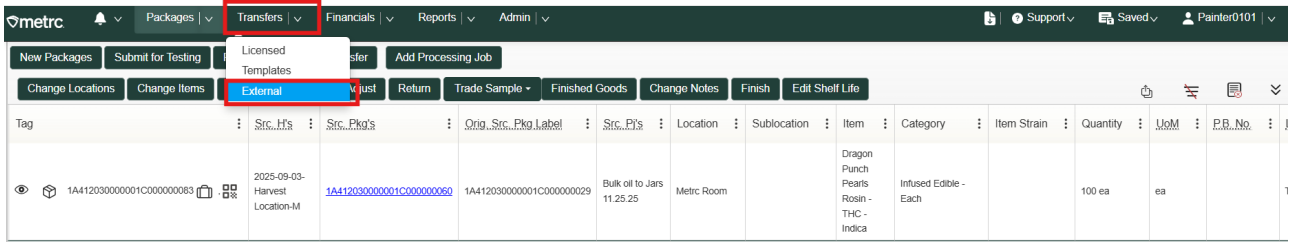
**Note: Please ensure that the product you are marking as a trade sample is a Finished Good package and has a testing status of TestPassed or RetestPassed. Finished products must also be designated as a trade sample on the physical packaging of each cannabis product.**



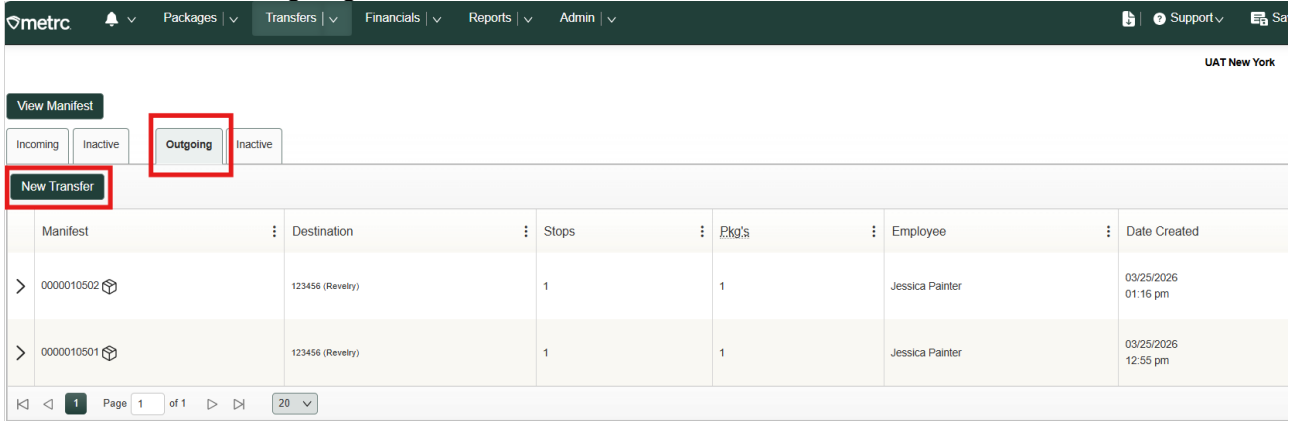
#### Step 2: Create an Outgoing External Transfer

Once packages have been designated as trade samples, follow the steps below to initiate movement of product to the event location:

4. Navigate to **Transfers > External** in the Metric navigation menu.



5. Select the **Outgoing** tab and select **New Transfer**.



- 6. Select the Buyer's Club event transfer type from the available transfer type options.
- 7. Create an outgoing transfer to the event location. Enter the buyers club event name in the Destination Name and destination address in the Destination Address field.
- 8. Add all applicable trade sample packages to the transfer manifest.
- 9. Save and submit the transfer.

**Note: The destination address field is currently a free-form text entry. Licensees are responsible for ensuring the event address entered is accurate at the time of transfer creation.**

**New Outgoing Transfer**
✕

Type Buyer's Club Transfer

**Destination 1** (clear)

Dest. Name Buyers Club Event Name

Phone No. 123-456-7890

Dest. Address 123 Apple Street

Suite Suite B

City Albany

State + Zip N 12345

Planned Route NYC to Albany

Invoice Number Enter the Invoice Number

Est. Departure 04/07/2026 today

Time 05 : 55 PM

Est. Arrival 04/07/2026 today

Time 05 : 55 PM

**Transport # 1** Type part of the License Number. Q (clear)

Phone No. ex. +1-123-456-7890 (use default)  Layover

**Driver 1** Jane Doe Q (clear)

Driver's Name Jane Doe

**Vehicle 1** Type part of the vehicle make, m Q

Vehicle Make Ford

Employee ID 12345

Vehicle Model Tempo

Driver's Lic. No. 67890

License Plate MTC-123

Registration Number 12345

+ (details)

+ (transporter)

**Package # 1** 1A41203000001C000028993 Q (clear)

+ 1 (package)

+ 1 (destination)

Cancel Register Transfer

### Post-Event Reconciliation

After the Buyer's Club event concludes, licensees must complete the following reconciliation steps promptly. Failure to complete the external transfer may result in inaccurate inventory records.

10. Return to **Transfers > External** and locate the outgoing Buyer's Club event transfer.
11. **Complete** the external transfer to finalize the transaction in Metrc.
12. Confirm that all transferred packages have been removed from your active inventory.

**View Manifest**
incoming inactive outgoing inactive

Manifest	Destination	Steps	Flgs	Employee	Date Created	
0000011303	02000 (Buyers Club Event Name)	1	1	Jessica Parlier	04/02/2026 10:02 am	<span style="border: 2px solid red; padding: 2px;">Transfer</span>

### Bringing Inventory Back to Retailer Facility

After the Buyer’s Club event if you would like to **bring products back to a physical Retailer facility location**, please follow the following instructions.

1. Go to **Admin>Items** Include a new Item titled **“Buyers Club Samples”**
  - a. Category is **Variety Pack**
  - b. Unit of Measure – **Each**
  - c. Description **“Buyers Club Event Samples”**

**Add Items** [Close]

Item # 1 [clear]

Name: Buyers Club Samples      Unit of Measure: Each

Category: Variety Pack      Description: Buyers Club Event Samples

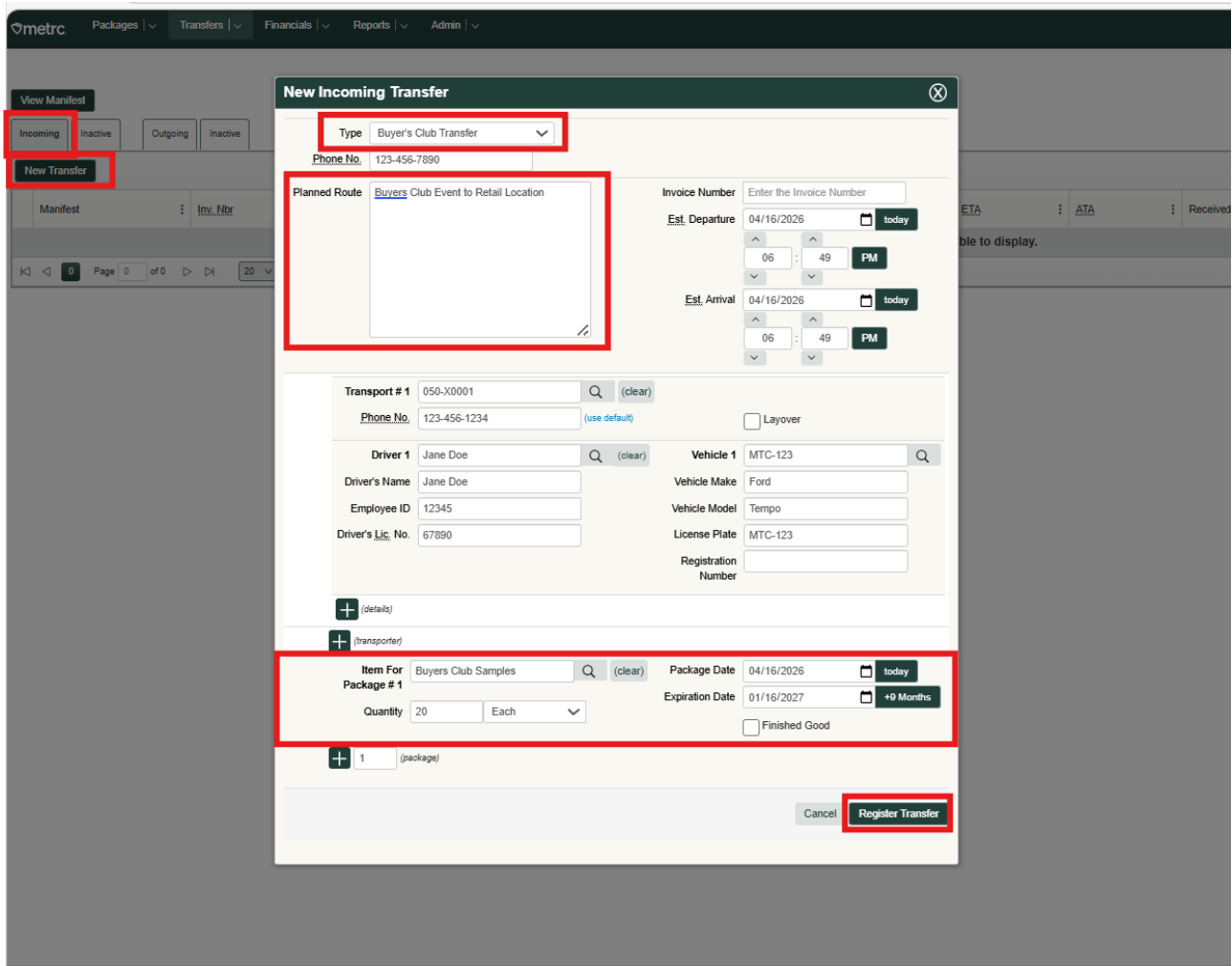
+ 1 (ingredient)

+ 1 (item)

**Why is there no multi-Facility create such as that available in Employees, Strains, and Locations?**  
Certain Item Categories require the selection of a pre-existing Strain. Verifying and informing that the specified Strain exists in all of the selected Facilities would be convoluted and complex to inform. For this reason we have opted to not add the ability to create Items in multiple Facilities at the same time.

Cancel    **Create Items**

2. **Email the Office of Cannabis Management** requesting to bring samples into the Retail facility.
3. Once instructed by OCM, bring the item in via **External Incoming Transfer**.
4. Select **“Buyers Club Samples”** as the External Incoming Transfer Type
5. Include Planned Route, Transport, Vehicle, Driver and Package information
6. For the package information, utilize the Item created for **Buyers Club Samples**, include the quantity of all assorted samples in **one Package UID**
  - a. # of units = to the total number of assorted units
7. Select **Register Transfer**.



### Adjust Package for Employee Samples at Retailer Facility

To provide samples to employees at your Retail facility. Please see instructions below:

1. Go to **Packages>Active** and select the Buyers Club Sample package.
2. Select Adjust
3. Include the quantity that the employee is sampling (please include a “-” to reduce quantity in a package)
4. Select the action reason “**Employee Trade Sample**” as the adjustment reason
5. Include the employee name who is consuming the sample in the **Required Note** field
6. Include the **Adjustment Date** for the date the sample was provided
7. Select **Adjust Packages**

### Quick Reference Summary

The following summarizes the full workflow at a glance:

- **Before the event:** Designate applicable Package UIDs as trade samples in the Packages grid.
- **To move product:** Navigate to Transfers > External, select the Buyer's Club event transfer type, and create an outgoing transfer to the event location.
- **After the event:** Complete the external transfer in Metrc. If bringing product back to a physical Retail facility, please reach out to OCM.

## **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.