# Metrc Support Bulletin



| Bulletin Number:<br>CA_IB_004 | Distribution Date:<br>10/30/2024 | Effective Date:<br>10/30/2024 |
|---|---|---|
| **Contact Point:** Metrc Support | **Subject:** Knowledge base enhancements in Metrc | |
| **Reason:** Provide an update on new knowledge base functionality in the Metrc system. | | |

Greetings,

Metrc is thrilled to announce the launch of Metrc Expert, an innovative knowledge base accessible through a convenient widget in your Metrc application.

This Metrc Expert platform incorporates cutting-edge AI technology, providing automated responses with unprecedented speed and accuracy. In addition, knowledge base documents are easily accessible through the Metrc Expert widget.

The Metrc Expert functionality is available to licensees in California with the goal of improving your experience with our self-service support services and resources.

Please note, this update will not impact your Metrc account. Read on for guidance on how to take advantage of this new self-service resource.

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# Accessing Metrc Expert

Upon login to Metrc, the new Metrc Expert widget will be visible in the lower right-hand corner of the screen and will look like a question mark icon – **see Figure 1.**
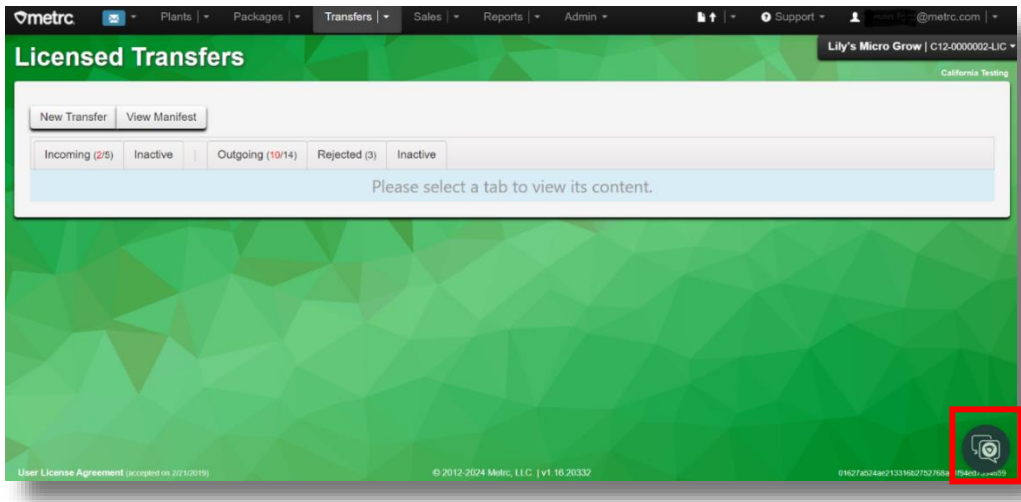


**Figure 1: Metrc Expert widget**

# Navigating Metrc Expert

By clicking on the widget icon, a small pop-up window will appear. From the Metrc Expert pop-up window, two main options will be available, including self-help resources and access to Metrc Support Guides – **see Figure 2.**
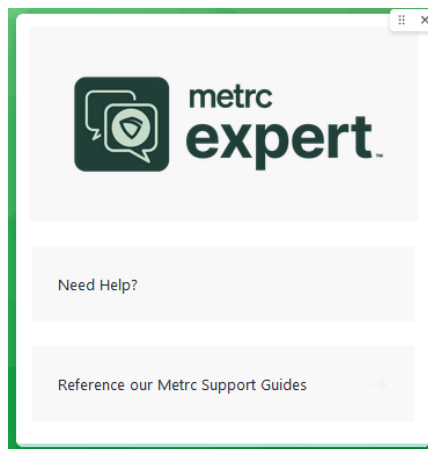


**Figure 2: Metrc Expert widget pop-up window**

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![metrc logo]

**Need Help?**
This option allows users to ask a question by typing it in the "Type a question here…" text field, hit the 'send' icon, and an automatic AI-generated response will be delivered for personalized support at unprecedented speed and accuracy – **see Figure 3.**
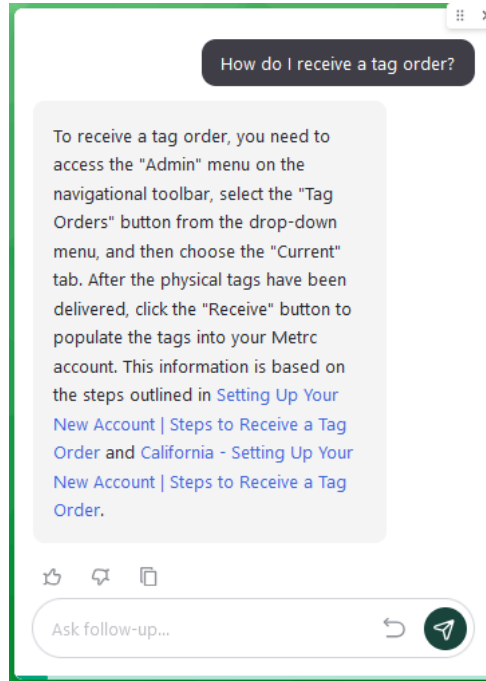


**Figure 3: Metrc Expert self-help auto-response support**

If you need additional information, you can ask a follow-up question or click the 👎 icon to quickly open a Metrc Support case or start a Live Chat with one of our support agents – **see Figure 4.**
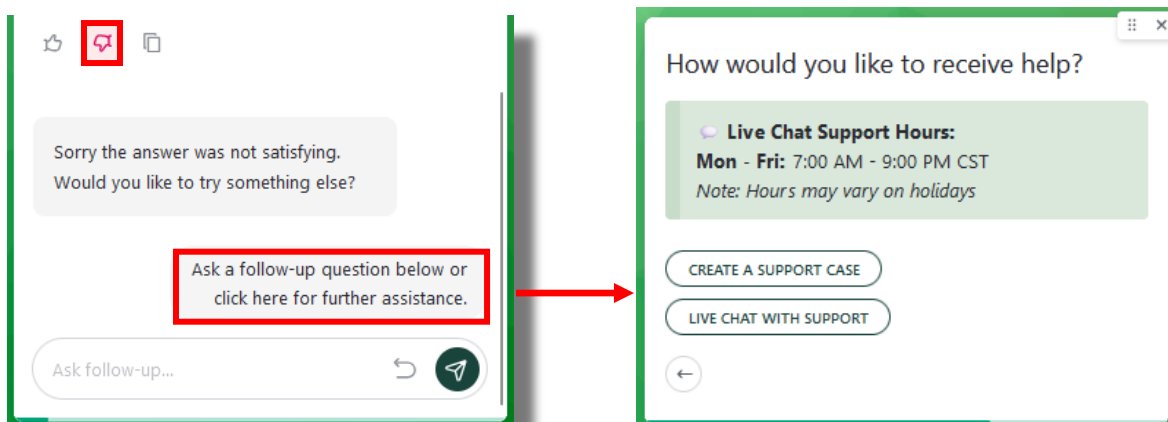


**Figure 4: Contact Metrc Support**

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**Reference our Metrc Support Guides**
The second option from the main pop-up window shown in **Figure 2** above includes easier access to knowledge base documents directly through the Metrc Expert widget.

By clicking on "Reference our Metrc Support Guides" from the main widget pop-up window, an expanded pop-up window will appear that will provide access to various searchable resource options – **see Figure 5.**
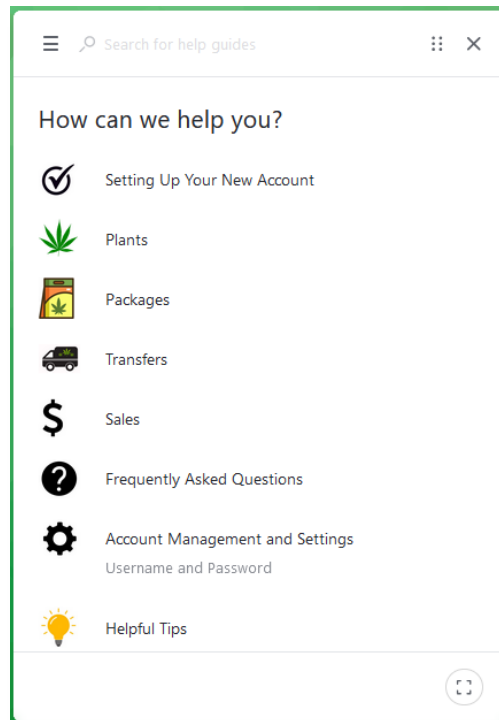


**Figure 5: Knowledge base searchable resources pop-up window**

From this pop-up window, users can use the Search free text field at the top of the window to type in what type of information is being searched for or click on one of the links located under the "How can we help you?" header to access additional information.

By clicking one of the available links, users can access helpful tips, frequently asked questions (FAQs), training and registration information, user guides and many other topics, such as tips on getting started with Metrc, how to log in to the system, and information related to Plants, Packages, Transfers, Sales, and more.

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For example, to access more information regarding Immature Plants, users can click on the "Plants" option from the main resources list to populate a variety of additional, clickable information.

Below shows an example of a user clicking on "Plants" and navigating to Immature Plants information – **see Figure 6.**
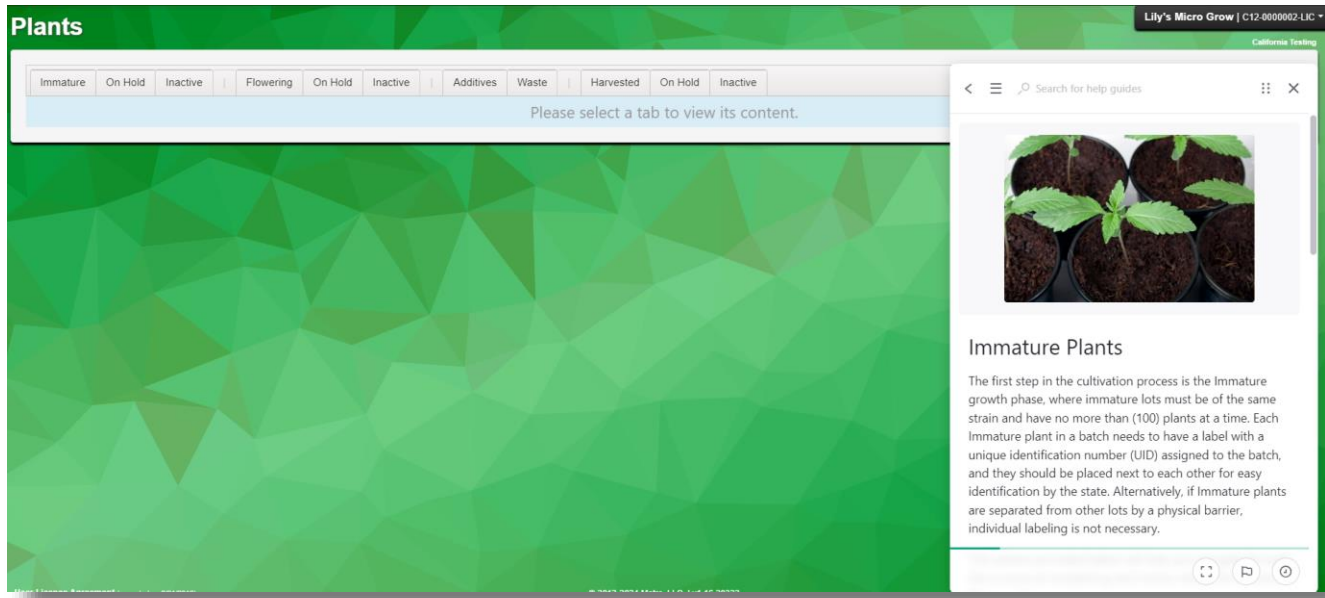


**Figure 6: Immature Plants information in the Plants section**

Within this new knowledge base, users can discover an expanding range of topics, best practices, and useful information to assist in navigating the Metrc system more efficiently.

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In addition, users can click on the three vertical lines in the upper left corner to drop down a list of resources, including links to the Metrc Learn training or registration and the Metrc website – **see Figure 7.**
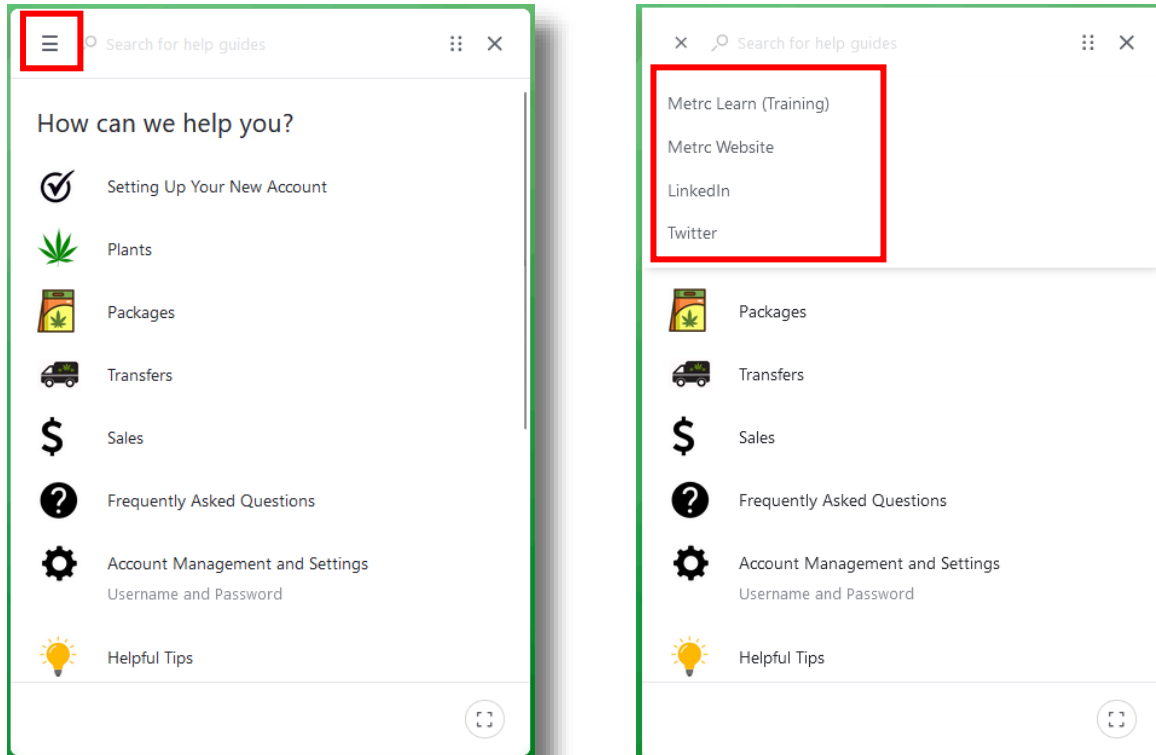


**Figure 7: Additional resources dropdown**

When ready to minimize this specific dropdown, click the "X" in the upper left corner.

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# 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, 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 call 1-877-566-6506 if you need assistance accessing support resources.

*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 on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more from the dropdown.

Thank you for your continued partnership.

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