Metrc Support Bulletin

Bulletin No: State_MO_0012	**Distribution Date**: 12/28/21	**Effective Date**: 12/28/21
Contact Point: Metrc® Support	**Subject**: Metrc Knowledge Center and Metrc Learn	
Reason: Metrc is announcing new features that will be offered to the industry for support and training		

Greetings Metrc Users,

Metrc is pleased to provide information on new resources that will be available to the industry for Metrc Support and Training. The bulletin is split between the two new resources, Metrc Learn and the Metrc Knowledge Center.

Metrc Learn is an interactive learning management system, that allows users to complete modular training for multiple areas of Metrc. The system will teach the user specific functionality and processes, allow the user to demonstrate, and test the user on the information provided. Users will even be able to export and share their completed trainings.

The Metrc Knowledge Center is a portal that provides users on-demand access to various resource materials including past bulletins and helpful links. This center is designed to be a supplemental resource to the Metrc Support team, providing options for self-assistance with documentation, a live-chat feature, and the ability to submit support tickets directly to our team.

Please find on the following pages a detailed description of the new features:

Metrc Learn – An Interactive Learning Management System

Metrc Learn is designed to provide users with skills on the functionality available within Metrc they need to use the system effectively. Metrc Learn is organized into role-specific programs that are made up of various courses; each course is focused on one function in Metrc. For example, the Cultivator program might include 15 courses, such as "Creating an Immature Plant Batch," "Tracking Additives," "Reporting Waste," etc.

At this time, Metrc Learn offers four programs—Cultivator, Manufacturer, Sales, Testing—and 42 courses. Additional programs and courses are currently under development.

To access Metrc Learn, the user will register their account (Metrc Learning Registration), and upon approval of Metrc status, will be sent an email invitation to set their password. If a user is working in multiple states or licenses, you should register for the program that reflects the area of your role you are looking to have additional training on first. This registration page is shown below in **Figure 1**.
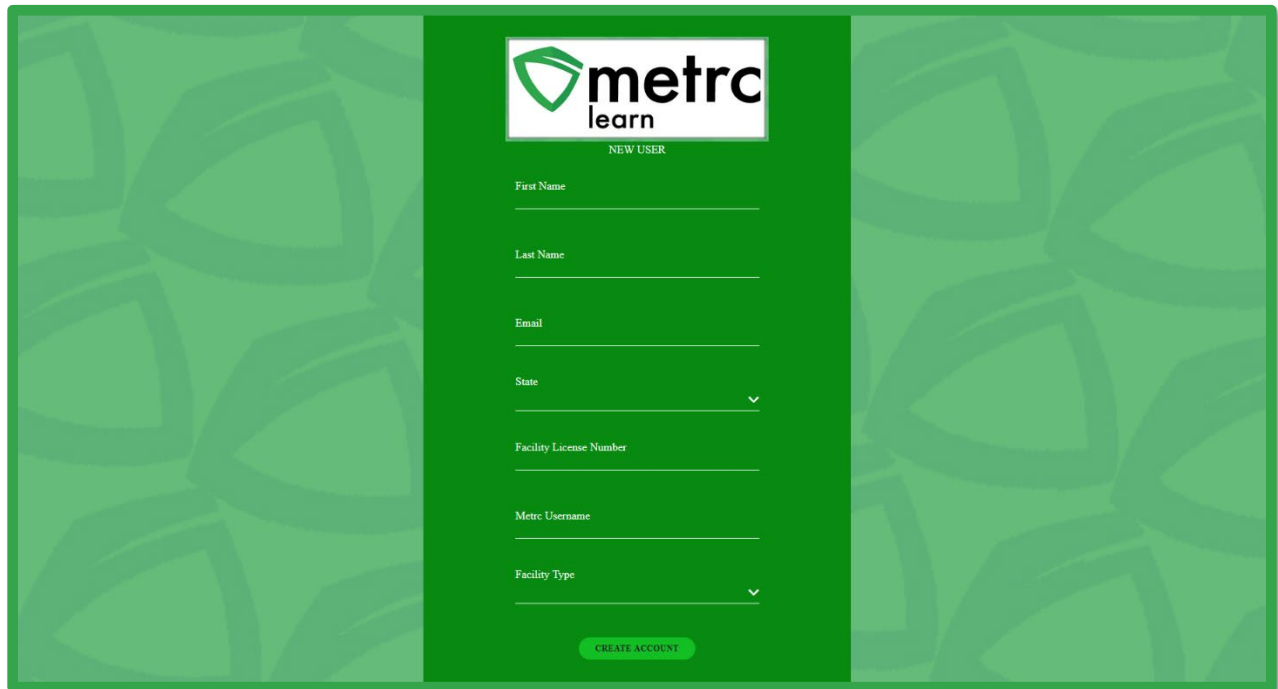

Figure 1: Metrc Learn Registration Page

Please Note: *Users are encouraged use an email they will have access to regardless of business association for their registration to ensure that any training transcripts are still accessible if email access is no longer available.*

Course trainings are interactive and iterative to reinforce learnings and ensure knowledge retention. Each course includes a demo and a hands-on component. The demo visually walks

users through each step of the process and includes guidance via pop-up windows and voice narration. An example is shown below in **Figure 2**.
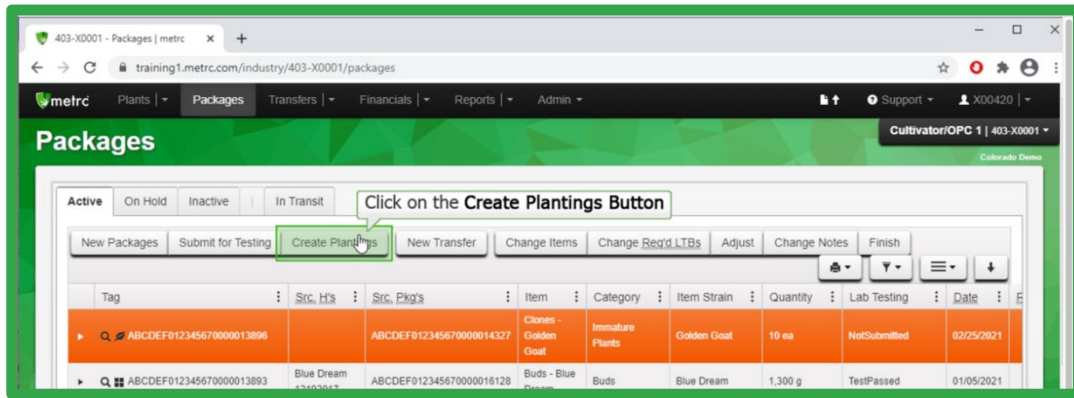

Figure 2: Demonstration Example

After viewing the demo, users get to try it themselves. As they step through the process on their own, they receive prompts and guidance if they make any errors. They can review the demo and try it themselves as many times as they'd like. This feature can is shown below in **Figure 3**.
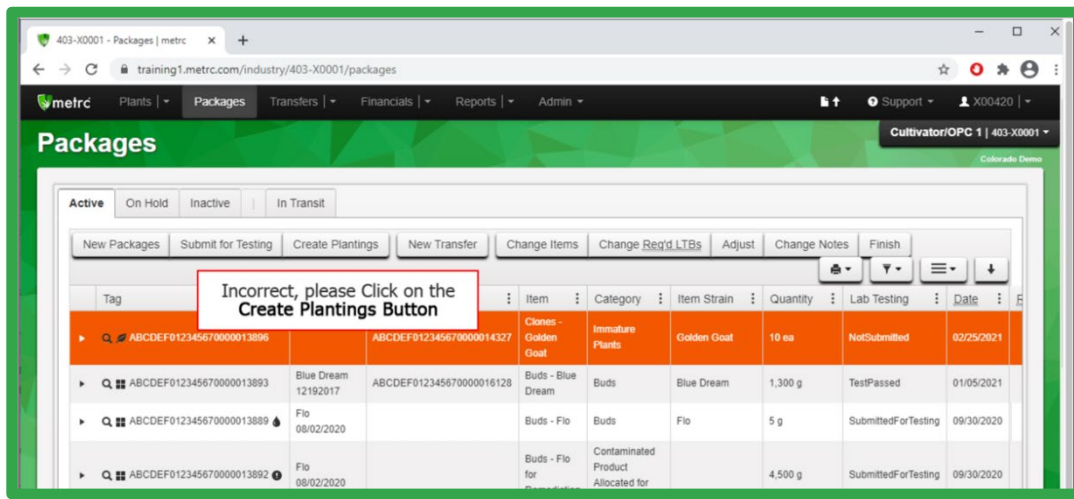

Figure 3: Interactive Demo Example

Users can either self-select or be assigned programs and can take each course at their own pace. This approach gives users the flexibility to learn about other areas of the system that may interest them, as well as the ability to see what courses are mandatory for their role. Once they complete all courses in a program, they take a comprehensive quiz, which they must pass (scoring 70% or higher) before the program is considered complete.

Metrc Learn tracks and displays all completed coursework. You will even have opportunities to receive badges and certificates upon completion of a program. And, if they want, they can print out a transcript of all their trainings for record keeping and ongoing training exercises.

Export Transcripts

Users will be able to export and share their achievements in the training portal by using the "Export Transcripts" button under their learning library. This feature is shown below in **Figure 4**.
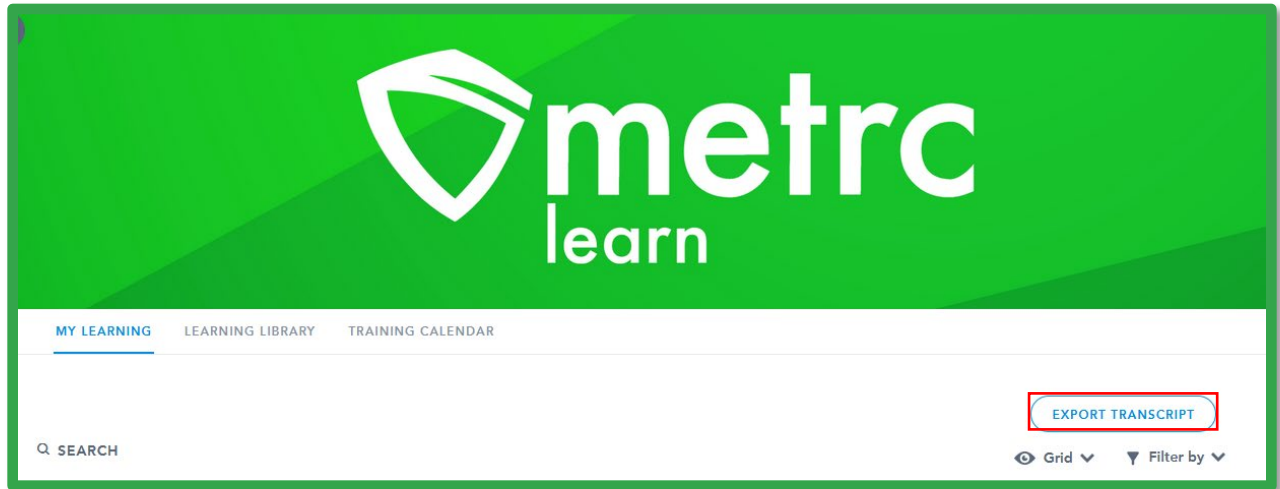

Figure 4: Export Transcript Feature

Learning Library

Users can also explore the Learning Library—and its many dozens of YouTube videos and resources—or find webinars they'd like to attend via the Training Calendar. This feature is highlighted in **Figure 5.**
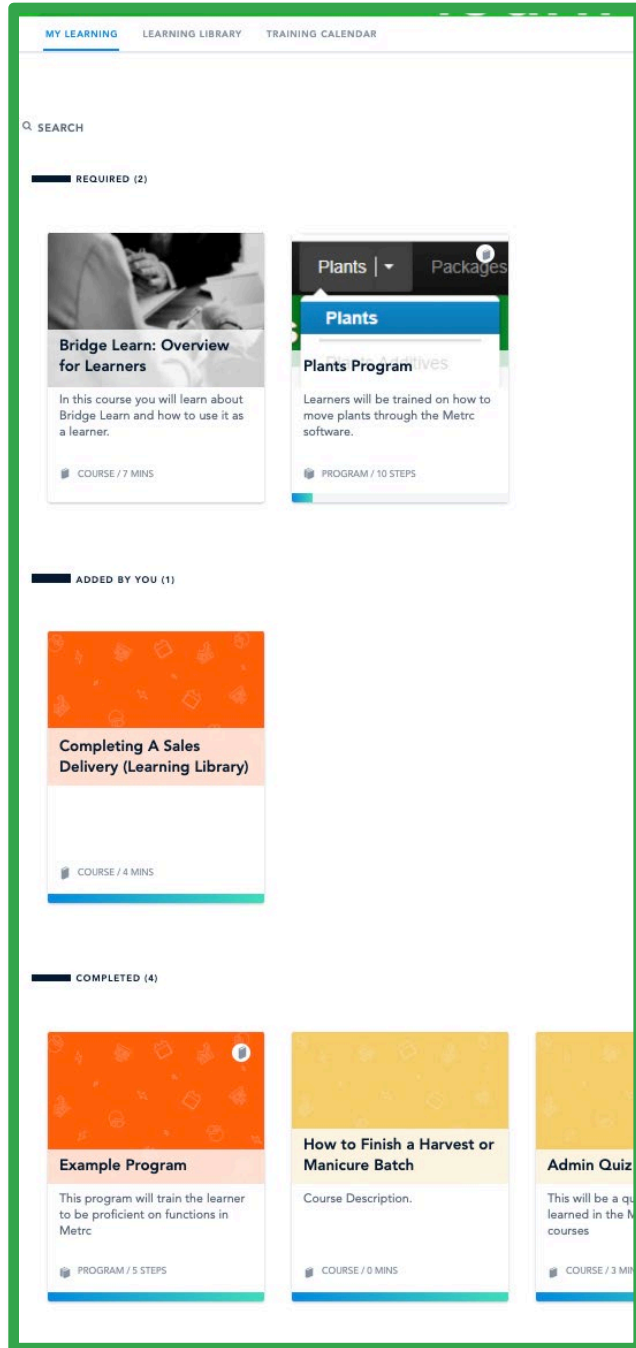
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Figure 5: Learning Library

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<u>Metrc Knowledge Center</u>

The Metrc Knowledge Center is designed to provide licensees the ability to search and view Metrc related content. The knowledge center is a repository for information that Metrc Support would normally help them obtain. This includes Bulletins, helpful links and, in the future, best practices and common questions.

For example, if a user was looking for a certain bulletin, they can enter the bulletin number or key words in the search bar to find all the relevant documentation.

The search feature is located at the top of the page along with a link to Metrc.com and below that our contact information and hours. Below this section they will see a button for their state that will take them to their repository. This can be seen in below in **Figure 6**.
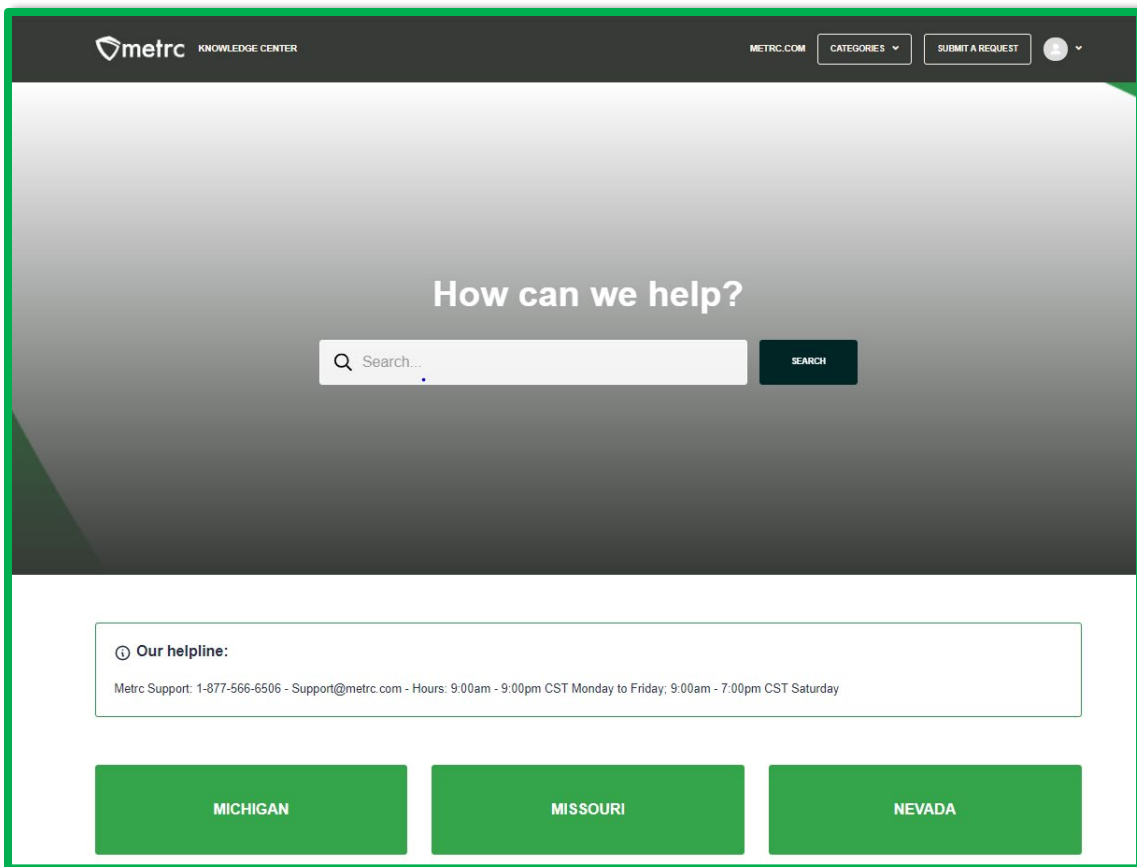

Figure 6: Knowledge Center Search Bar and Bulletin Repositories

The user will select the state they are in to view the bulletin repository and any additional links associated with that program. This is shown below in **Figure 7**.
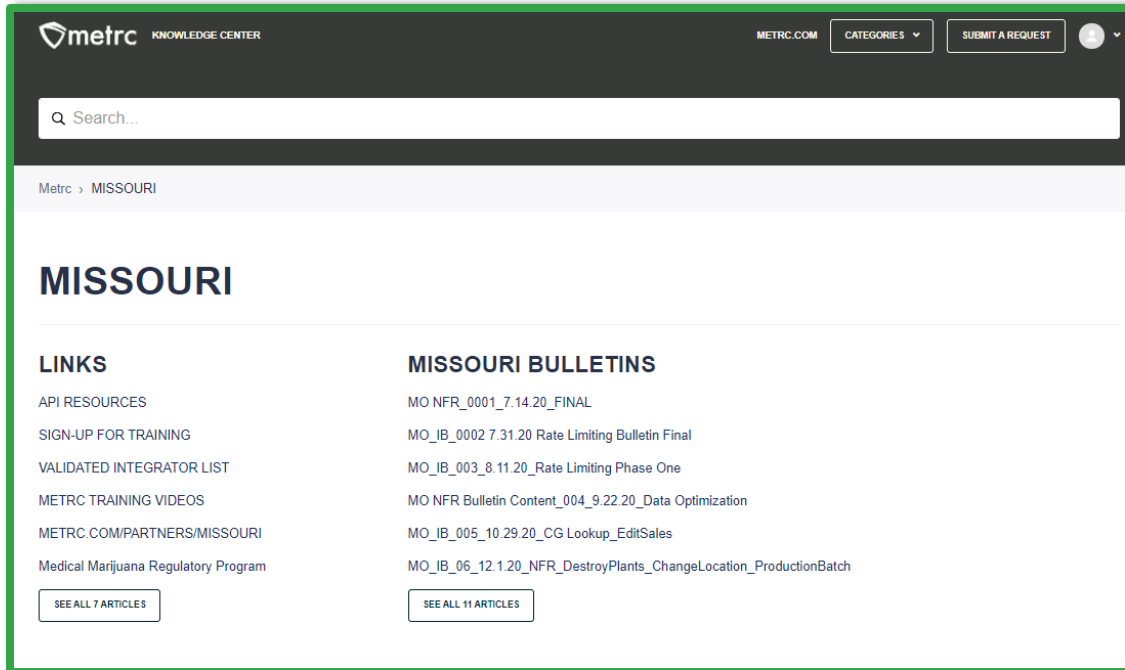
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Figure 7: State Page Example

Once a bulletin has been selected, it will take you to the bulletin page. The user can view the bulletin by clicking on it again, print the bulletin, share the bulletin, or follow to stay on top of any updates made to this bulletin. At the bottom, the user can indicate if the article was helpful to provide feedback on the documentation. This page is shown below in **Figure 8**.
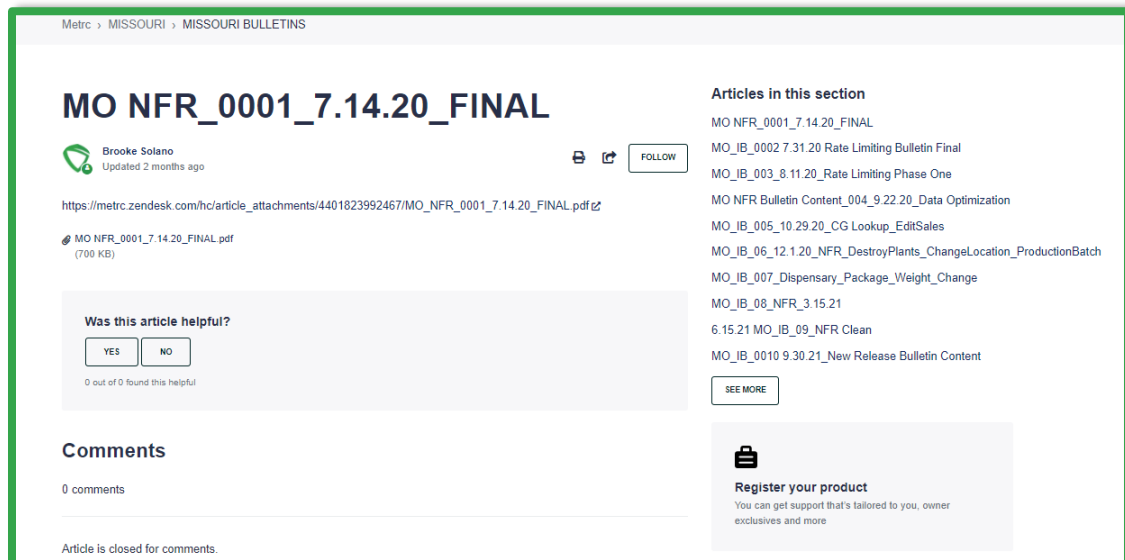

Figure 8: Bulletin Page

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If the user is unable to find relevant material to assist them in their request, they can submit a support ticket directly from the page. This option is shown below in **Figure 9**.
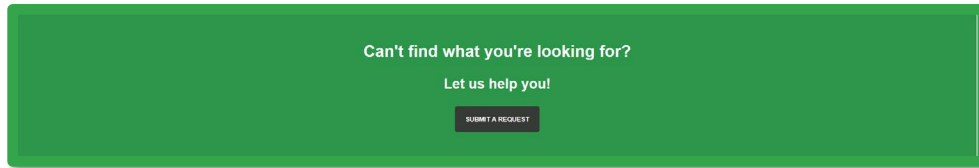

Figure 9: Submit a Request Button

By using this button, the user will navigate to the request area where they will fill out a form to submit to support. The user will indicate if it is a Support of API related request. This step is shown below in **Figure 10**.
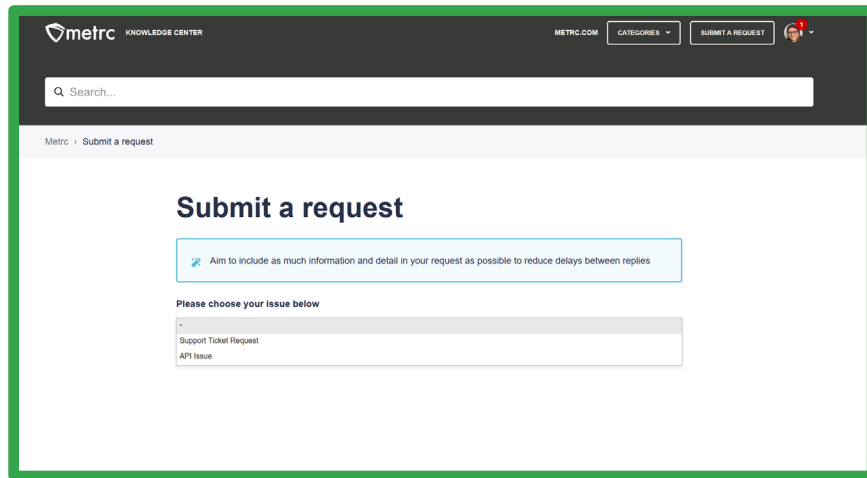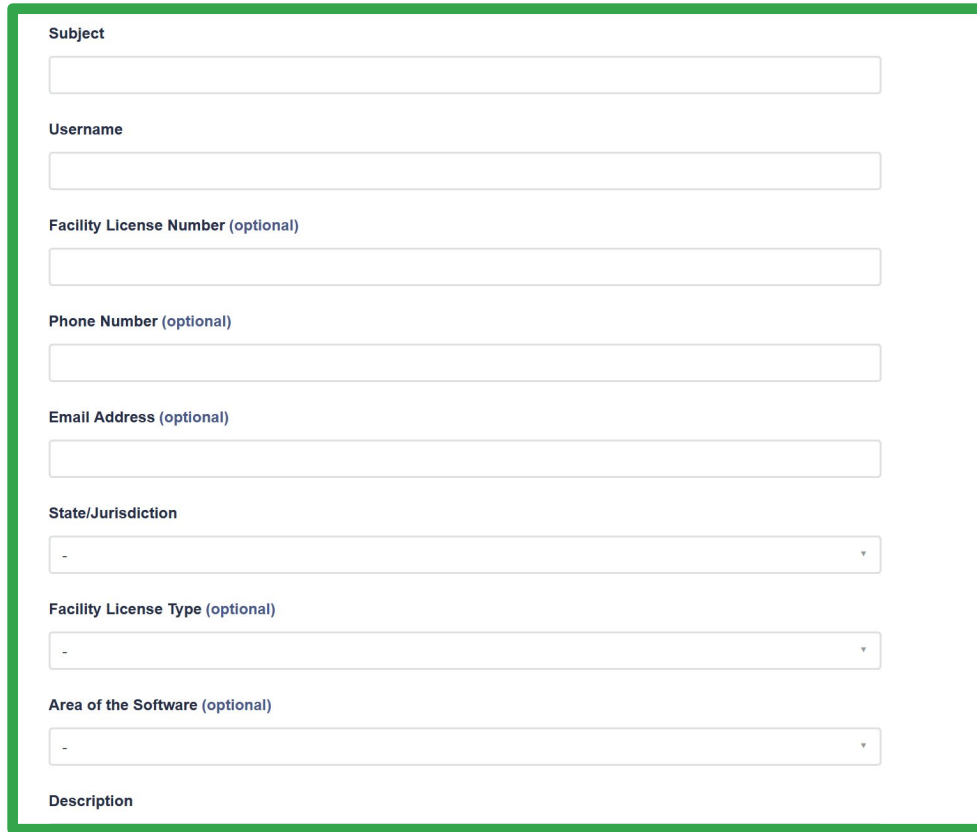

Figure 10: Submit a Request Landing Page

Once an option is selected, the user will be navigated to the Request Submission form. Here the user will enter the required information as listed, providing as much detail as possible to allow for the most efficient response from Metrc Support. This form is shown below in **Figure 11**.

Figure 11: Support Ticket Submission Form

Zendesk Answer Bot

The Answer bot is located in Metrc Support response emails to refer them over to the knowledge center. It is an AI function that learns as it is used by the industry. It ties into the knowledge center information only. Should the licensee need additional help at any time, they can utilize chat with support, have a phone call with support or send an email.

Live Chat

Live chat is another feature available through the Knowledge Center. This feature allows licensees to chat with the agents live. To access this feature, the user will click the icon and this will prompt an action window to begin chatting with an agent. The chat feature will ask some basic questions like their full name and phone number and give that information to the agent. This is shown in **Figure 12**, below.
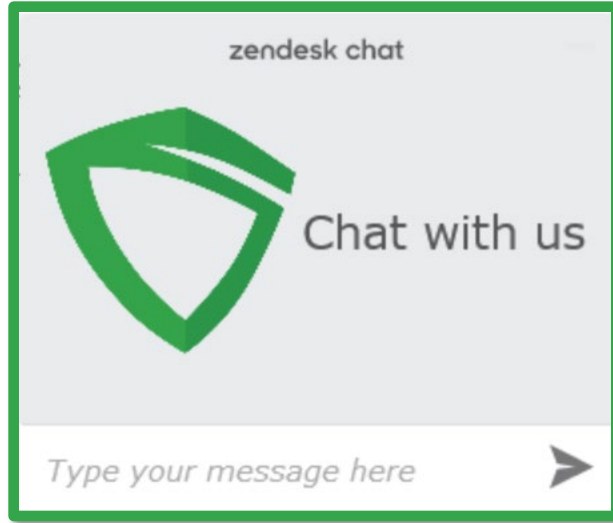
Figure 12: Live Chat Feature

How to Access

Metrc Portal is the access to the Metrc Knowledge Center for the licensees to login and see their own individual tickets. The user will be able to see the interactions between themselves and the agent.

The user can navigate to the portal login screen by using the link located under the support drop down in the Metrc user interface or by navigating directly to the webpage at support.metrc.com. This screen is shown below in **Figure 13**.
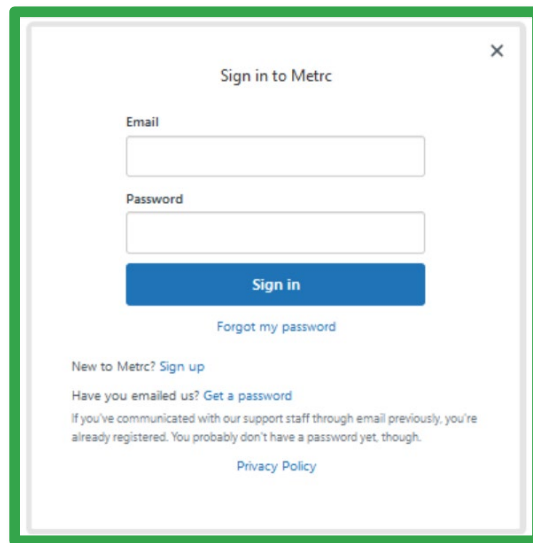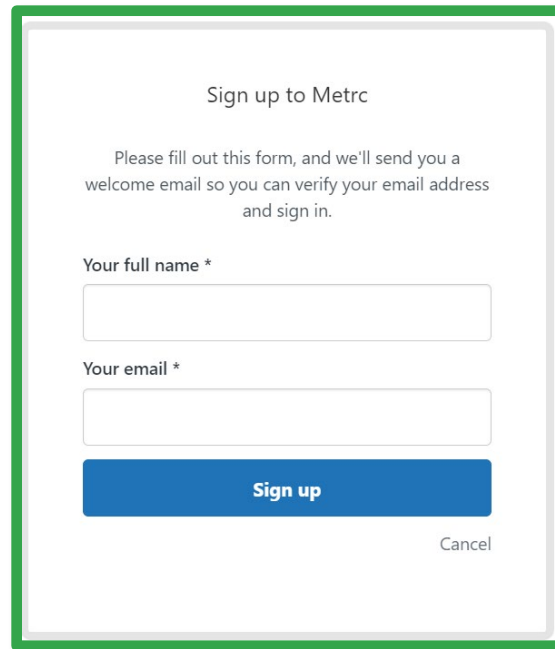

Figure 13: Metrc Portal Login Screen

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If not already registered, the user will use the "Sign Up" link to register their account. This link will prompt an action window where the user will indicate their name and email. This screen is shown below in **Figure 14**.

Figure 14: Metrc Portal Registration Window

Please Note*: Users will NOT use their Metrc credentials to try and enter the portal as they are not tied together and will need to register their account before logging in. If the user has already emailed Support they can use the "Get a Password" link on this screen.*

Helpful hints for submitting a support request

Whenever reaching out to Metrc support by phone email or chat, it is helpful for our team to address your tickets faster is the following information is provided with the initial communication from the user:

Full name

Business license number

Username in Metrc

Phone number

Email address

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.