

<b>Bulletin Number:</b> OR_IB_0050	<b>Distribution Date:</b> 04/042024	<b>Effective Date:</b> 04/12/2024
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Knowledge base enhancements in Metrc	
<b>Reason:</b> Provide an update on new knowledge base functionality in the Metrc system.		

Greetings,

Metrc is thrilled to announce the upcoming launch of Metrc Expert, an innovative state-specific Knowledge Base accessible through a convenient widget in your Metrc application.

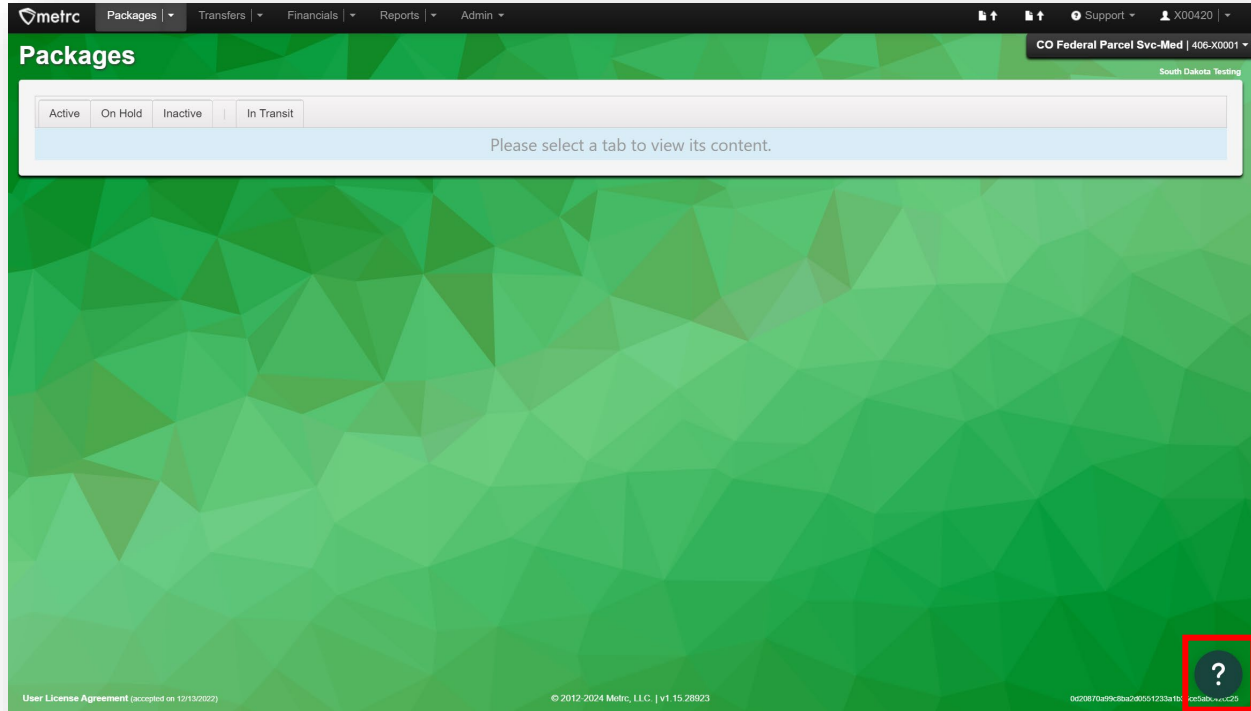
This game-changing platform incorporates cutting-edge AI technology, ensuring automated responses while delivering personalized customer support with unprecedented speed and accuracy. In addition, knowledge base documents will be easily accessible through the Metrc Expert widget.

On April 12th, initial Metrc Expert functionality will be available to licensees in the state of Oregon with a goal to improve your experience with our self-service support services and resources.

Please note, this update will not impact your login to the Metrc system. Read on for next steps and actions needed below to take advantage of this new self-service resource.

## Accessing Metrc Expert

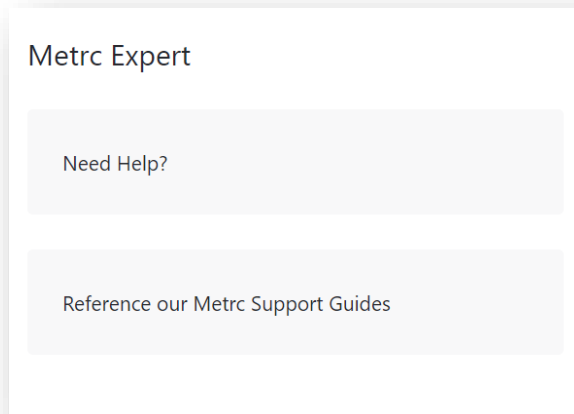
Upon login to Metrc, the new Metrc Expert widget will be visible in the lower right-hand corner of the screen and will look like a question mark icon – **see Figure 1.**



**Figure 1: Metrc Expert widget**

## **Navigating Metrc Expert**

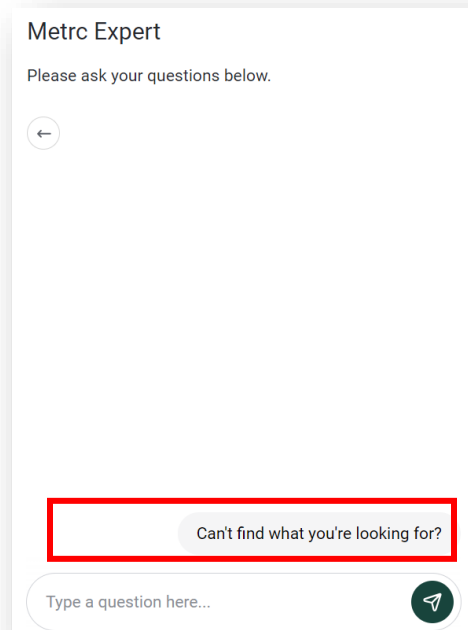
By clicking on the widget icon, a small pop-up window will appear. From the Metrc Expert pop-up window, two main options will be available, including self-help resources and access to Metrc Support Guides – **see Figure 2.**



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

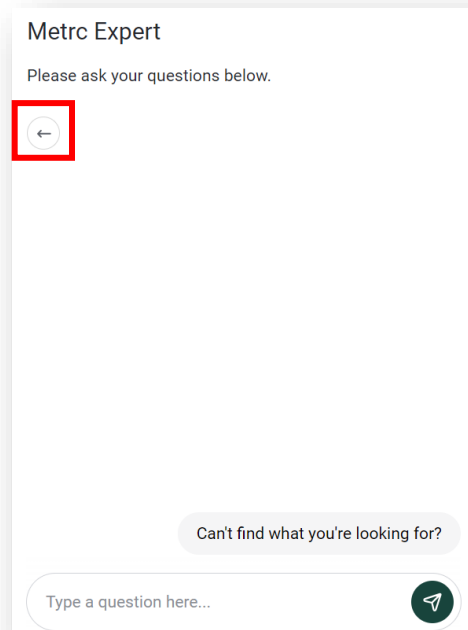
### **Need Help?**

This option allows users to ask a question by typing it in the “Type a question here...” text field, hit the ‘send’ icon, and 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**

To navigate back to the main Metric Expert widget pop-up window, select the back arrow toward the top-left of the open pop-up window – **see Figure 4.**

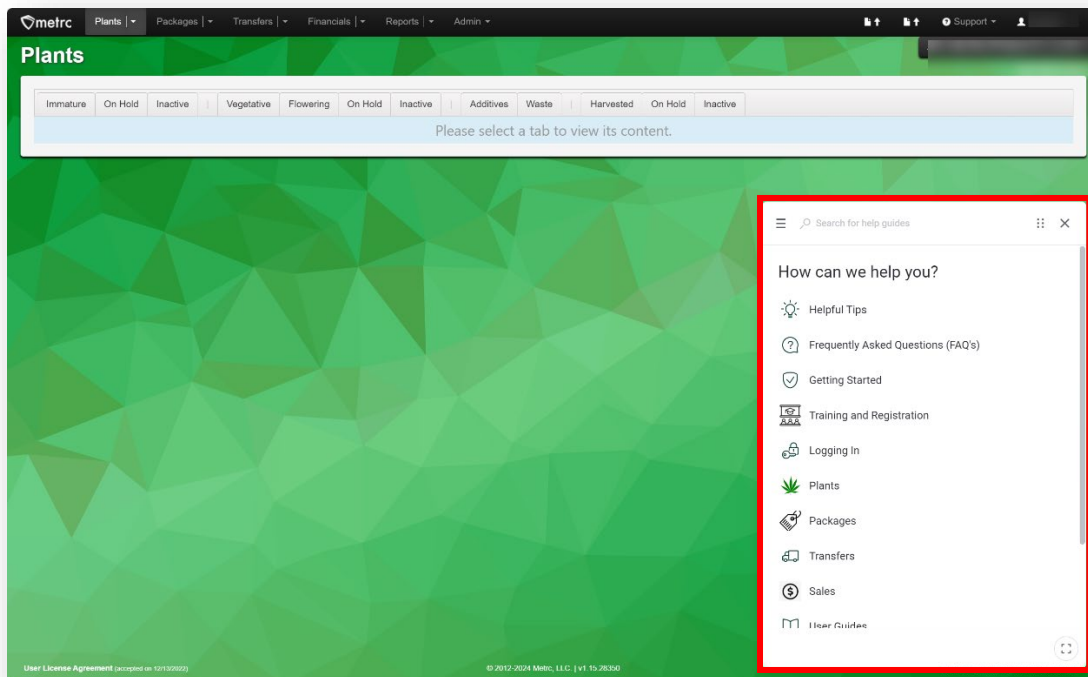


**Figure 4: Navigate back to the main pop-up window**

## Reference our Metrc Support Guides

The second option from the main pop-up window 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.**



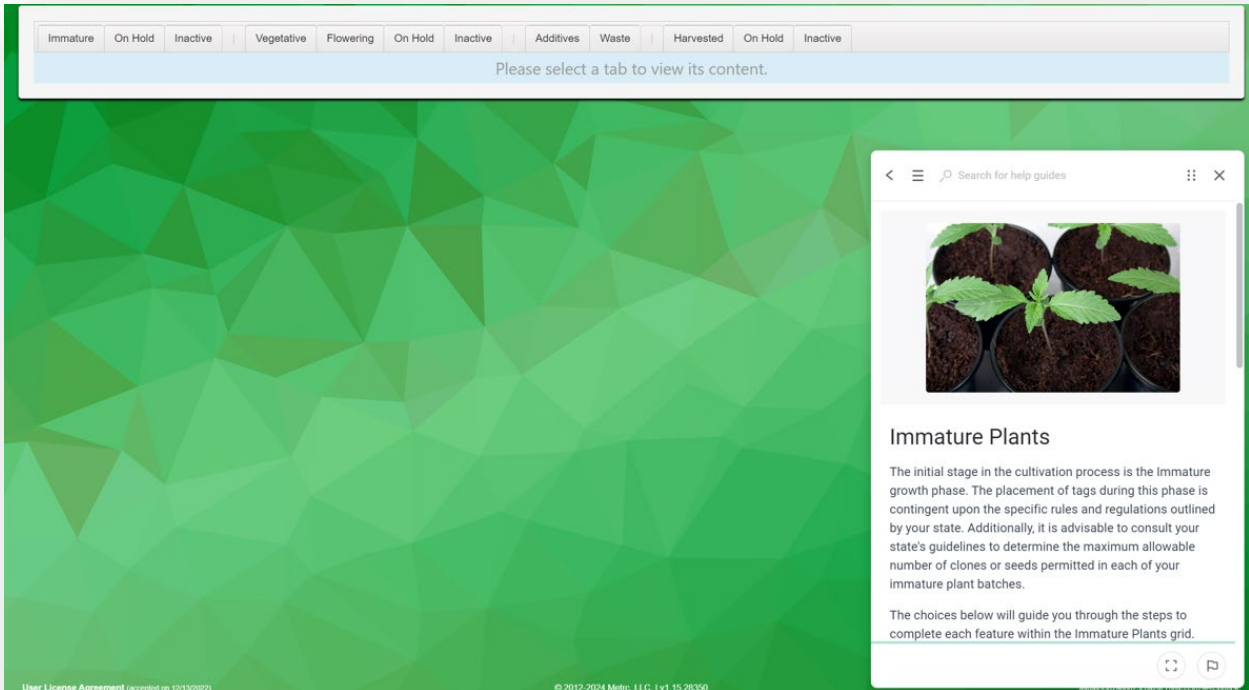
**Figure 5: Knowledge base searchable resources pop-up window**

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.

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.

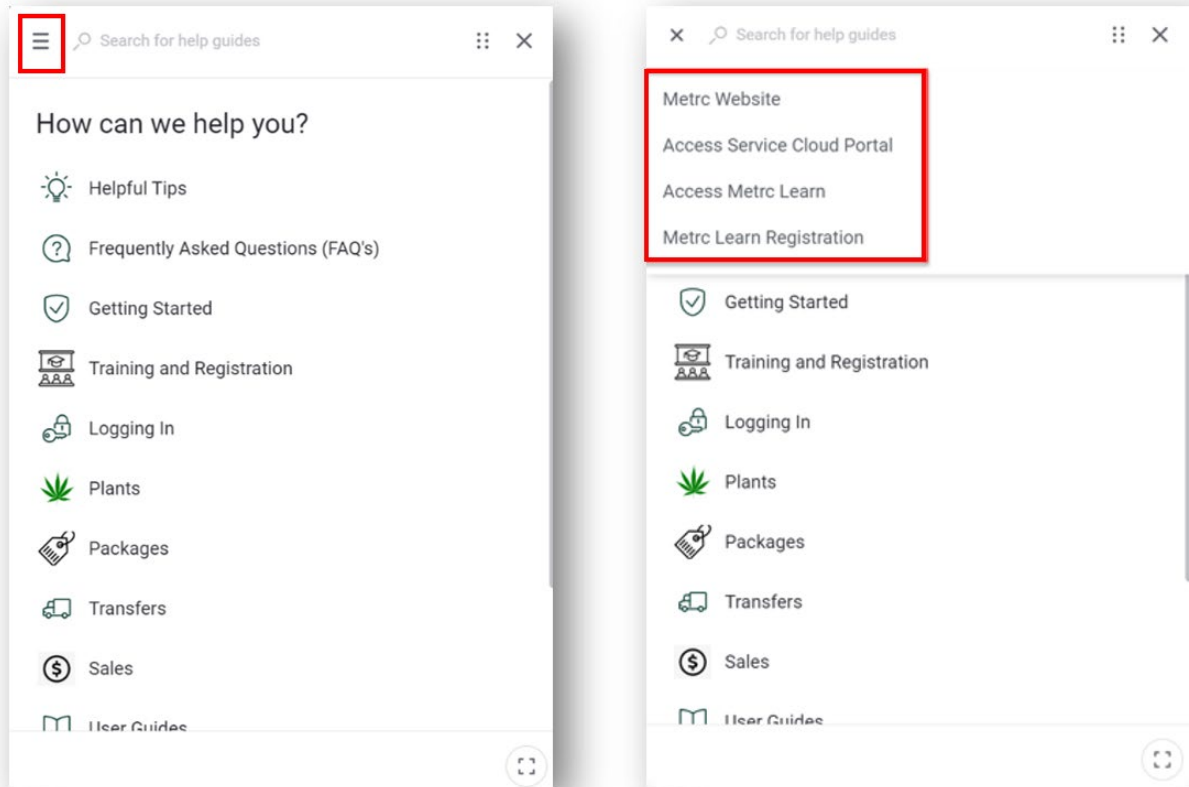
Below shows an example of a user clicking on “Plants” and navigating to Immature Plants information – **see Figure 6.**



**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.

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 website, Service Cloud portal, and Metrc Learn training or registration – **see Figure 7.**



**Figure 7: Additional resources dropdown**

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

### 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 Support and navigate to support.metrc.com and it will 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:** Various programs are offered to provide users with access to interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Based on valuable feedback received across the industry, we're proud to share that Metrc Learn is undergoing a redesign, featuring interactive modules and on-demand advanced training. Stay tuned for more exciting details rolling out soon, as we redefine your experience with Metrc!

To access, go to the Support area dropdown on the navigational toolbar within the Metrc system and click on “Sign up for Training”.

Thank you for your continued partnership.