



Quick Start Guide: Cannabis Businesses

A step-by-step document to get cannabis businesses set-up and ready to go on CannTrade.

1. Sign Up

(If you already have a CannTrade account, login and skip this step)

- Go to <https://app.canntrade.com/register>, enter your name, email, and password, and click “Create my Account.”

The screenshot shows the registration page for CannTrade. At the top is the CannTrade logo and the text "Try it for free. No credit card required." Below this are two buttons: "Sign up with Google" and "Sign up with Facebook". A horizontal line with the word "or" in the center separates these from the email sign-up section. The email sign-up section is titled "Sign up using my email address" and contains four input fields: "First Name", "Last Name", "Email", and "Password". At the bottom of this section is a green button labeled "Create My Account".

- Type the name of your business into the Company Name field. You can enter your licensed business name or your DBA. Your business may already be in our database. Once you begin typing, autosuggestions may appear below. If you see your business pop up, **click** on your business to claim it. *If your business doesn't pop up, simply enter the entire business name.*

Once your business name is entered or selected, enter your phone number (ideally your direct number), and click “Start Using CannTrade.”



CANNTRADE

Mark Twain
aholub+marktwain@gmail.com

Lets find your business in our database. If we can't find it, we'll create it for you.

Your Company Name

555-555-5555

Create my business
Your Company Name

Start Using CannTrade

2. Complete Your Registration

- Input your valid business Street Address, City, and Zip Code. Then click “Save and continue”

Business Details
Tell us about your business. These fields are required to enable trading.

Organization Name
Jackson River Cannabis Co

Street Address
Street address, P.O. box, etc

Address Line 2
Apartment, suite, unit, etc

City
City

Zip
Zip

ZIP Code Unverified

Save and continue

3. Upload License Documents

Only Fully Licensed cannabis businesses will be verified and activated on the CannTrade platform. In order for your account to be reviewed, you must upload a valid state cannabis license (or multiple licenses if required to operate in your state), *and* a “resellers permit” or “sales permit” if required to do business in your state.



- In the Licensing Section, choose “Cannabis Business.” Then **check ALL the boxes** that pertain to your business operations.
- Click the “+ Add License” button.

A screenshot of the "Licensing & Compliance" section in the CANNTRADE application. At the top, there are three circular icons: a calendar, a document, and a checkmark. Below the icons, the section is titled "Licensing & Compliance". The first question is "Does your business cultivate, manufacture, process, sell, or transport hemp or cannabis?" with radio buttons for "Cannabis", "Hemp", and "No". The second question is "Which of the following best describe your business?" with several checkboxes: Cultivator, Dispensary (Storefront), Dispensary (Delivery), Distributor, Distributor (Transport Only), Manufacturer, Laboratory / Testing, Event Organizer, and Operator. Below this is a section for "State Licenses" with a note: "If you do not have a license at this time, you may skip this step. You can apply online for a Cultivator License, a Manufacturer License, or a Distributor, Retailer, Microbusiness, or Testing Lab License." At the bottom right, there is a blue button labeled "+ Add License".

- Enter your license information and upload a copy of your license (as a .pdf or image file) by clicking or dragging your license file into the red “Upload your State License File here” area.
- Click “Save.”

A screenshot of the "Add License" dialog box. It contains several input fields: "License" (a dropdown menu), "Type" (a dropdown menu), "Designation" (a dropdown menu), "Number" (a text input field), "Expires On" (a date input field), and "Address" (a text input field). Below these fields is a red dashed box containing a document icon and the text "Upload your State License here". At the bottom right of the dialog, there are "Cancel" and "Save" buttons.

- Add additional cannabis licenses by clicking “+ Add License” and repeating the process above.
- Click on the red “Upload your Sellers Permit here” area to upload your business’ Seller’s (sales) Permit if required.
- When you are finished in this area, click “Save and continue.”



Sellers Permit

Number

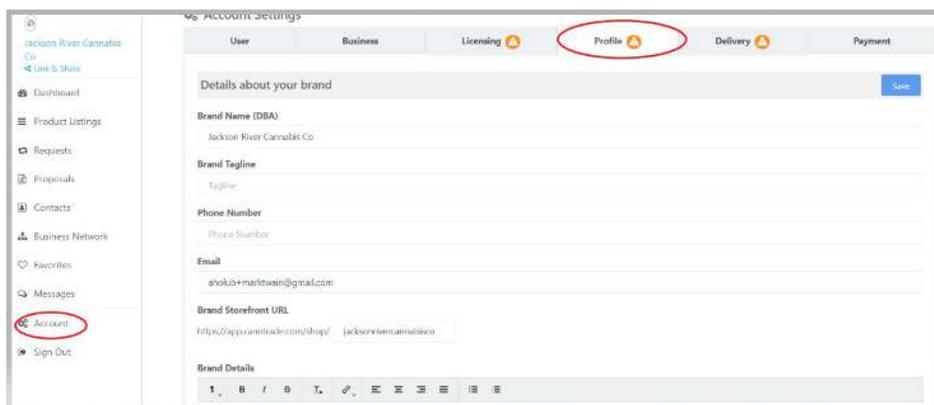
*note: If you ever want to return to the license section of your account after completing your registration, you may do so by clicking “Account” on the left vertical menu (near the bottom) and then clicking on the “Licensing” tab.

4. Finalize Your Business Profile

Once your license is submitted, the review of your account and licensing will begin. Depending on whether we have your business on file, your account may be verified instantly, or it could take up to 24 hours to verify and activate. You will receive an email notification when your account has been verified, but you are always welcome to track your status by sending a query to support@cantrade.com.

While you’re waiting (or not), the best next step is to complete your profile.

- Click on “Account” on the left vertical menu near the bottom. Then click on the “Profile” tab.



- **Brand Details:** Add details about your brand, your brand tagline or motto, and edit (if necessary) your business email and phone number (you may want to use your standard business email and number contact information in this section).
- **Storefront:** Set your Brand StoreFront URL. This will be the URL to your exclusive storefront (which you may link to your webpage--directions later in this document)



Brand Tagline	<input type="text" value="Trade Easy"/>
Phone Number	<input type="text" value="555-555-5555"/>
Email	<input type="text" value="support@cantrade.com"/>
Brand Storefront URL	<input type="text" value="https://app.cantrade.com/shop/"/> <input type="text" value="cantrade"/>

- **Upload your Banner:** (if you desire) by clicking the  button. Once you crop and align your banner, click “Save.”
- **Upload your Logo:** Repeat the process above for your brand logo. Click “save” to save it.
- **Website & Social Media:** Enter the URL’s for your website and desired social media accounts.
- **Hours of Operation:** Set your daily/weekly hours, then click “save” in the hours section.
- **Choose Privacy:** Select the privacy option that works best for your business (we recommend “General Public” as it creates the greatest pool of potential traffic for your brand, but still protects you from any non-compliant transactions). This is only for your profile (viewing your brand information and product titles/pictures), and will NOT grant non-verified buyers access to your wholesale pricing or other private business info.
- **Save!:** Make sure to click “Save” at the very bottom OR very top of the page.

5. Add Team Members

Invite your team members to join your account!

- Click “Account” > “Team”

⚙️ Account Settings

User	Business	Licensing	Profile	Team	Roles	Payment
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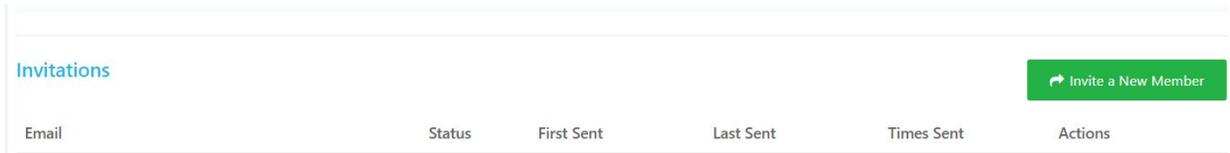
User Information
Tell us about yourself and how to contact you

First

Last



- Click the green “Invite a New Member” button.



- Enter the team member’s email address and click “Send”

The 'Send Invite' dialog box contains a text input field labeled 'Email' and a 'Send' button at the bottom right. The text above the input field reads: 'Enter the email address of the user you would like to invite to join your organization.'

- Repeat above steps for additional team members.

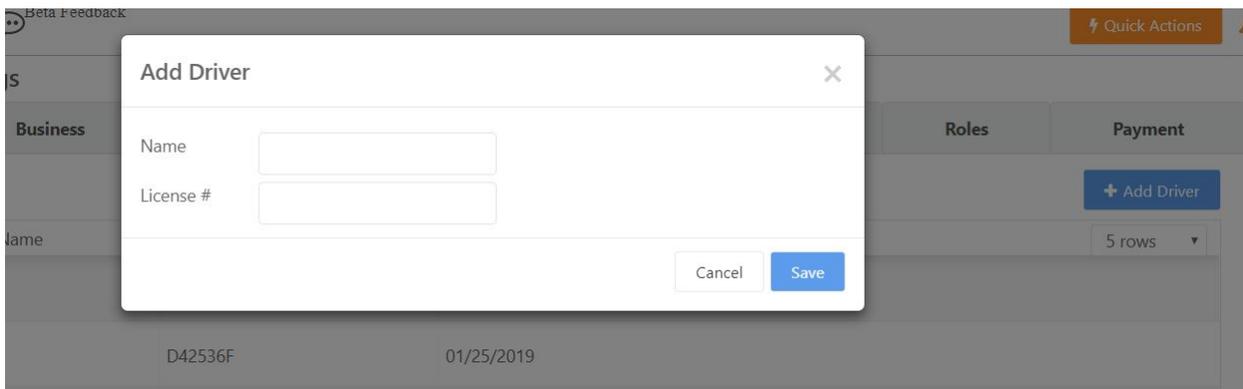
6. Add Drivers/Vehicles if applicable

If your business delivers or transports cannabis and your state requires that trip manifests/reports include driver and vehicle information (most do), you will add/manage driver information by doing the following:

- Click “Account” > “Delivery” Tab



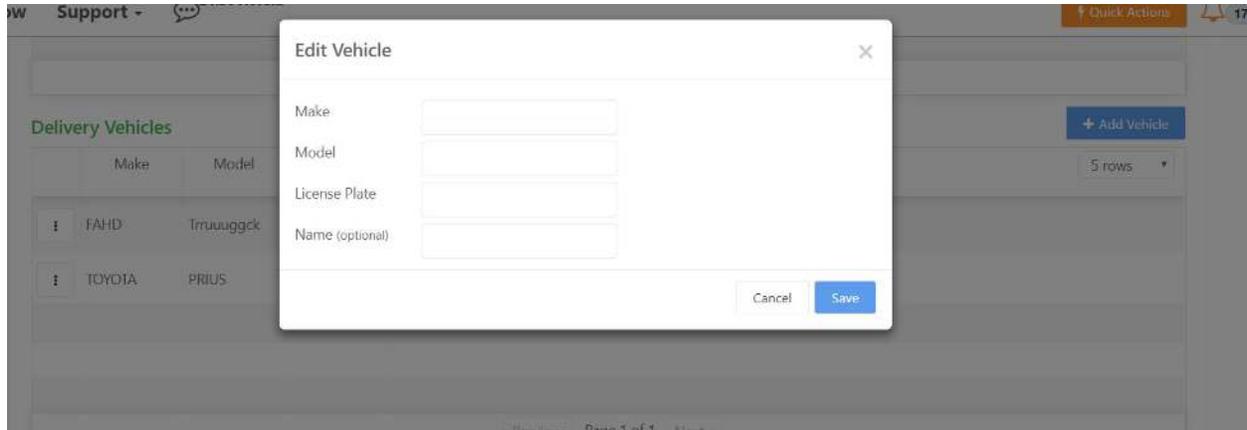
- Click the “Add Driver” button to add Driver name and License Number information. Click Save.



- Add additional drivers as necessary. Then click “Save.”



- Click the “Add Vehicle” button to add vehicle make, model, and license plate information. Click “Save.”



- Add additional vehicles as necessary. Then click “Save.”

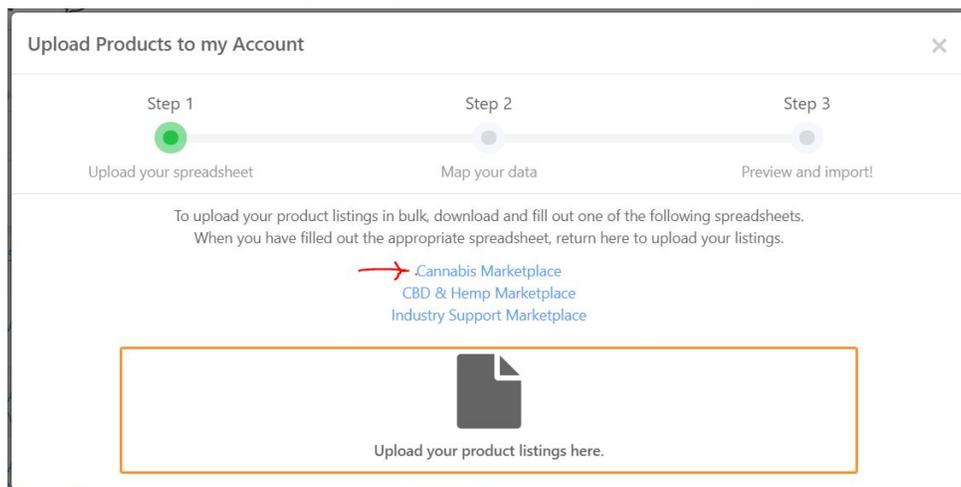
7. Upload Products via Spreadsheet

Note: You can always send your spreadsheets and product guides/pricing sheets to success@cantrade.com, and we will upload your products for you.

- Click on “Product Listings” on the left vertical menu.
- Click on the Blue “Upload Products” button.



- Select the “Cannabis Marketplace” spreadsheet to download the spreadsheet.





*hint, if you have non-cannabis products in addition to cannabis products (for instance, CBD only products), you will *also* want to download the other appropriate spreadsheets.

- Navigate to your downloaded sheet and open the spreadsheet.
- Click to “enable editing” on the spreadsheet.

	A	B	C	D	E	F
	Market	Product Name (Product Name/Title)	Child of? (enter row # of parent product)	Packaged for Dropdown: Pick most relevant	Category Dropdown: Cannabis Category	Subcate Dropdown: SubCate
1						
2	Cannabis					
3	Cannabis					
4	Cannabis					
5	Cannabis					
6	Cannabis					
7	Cannabis					
8	Cannabis					
9	Cannabis					
10	Cannabis					
11	Cannabis					
12	Cannabis					
13	Cannabis					

- Click “Save as” to rename your spreadsheet and save it.
- Fill out your spreadsheet with your products, with each product/SKU getting its own row. Click here for instructions on how to fill out your product upload spreadsheets.
- When you have finished entering your product information into the spreadsheet, be sure to “save” your sheet.
- Click the orange area that says “Upload your product listings here” (to get here, click on “Product Listings” > “Upload Products.”) and choose your saved product upload file.
- Click the “Automap” button

Upload Products to my Account

Step 1: Upload your spreadsheet | Step 2: Map your data | Step 3: Preview and import!

A preview of your imported spreadsheet is shown on the left below. Mappable fields are available on the right. Drag fields from the right to map them to your data on the left. Unmapped fields will not be imported. If you used a spreadsheet provided by CannTrade, use the Auto Map button below to automatically map fields.

The first row in my spreadsheet is a header. Don't import it.

Data Preview	Available Fields
Market Cannabis Cannabis Cannabis	Title e.g. Agent Orange Brownies
Product Name (Product Name/Title) Passion 200 Dose Pen Arouse 200 Dose Pen Bliss 200 Dose Pen	Market
	Department



- Review the automapped fields to make sure the system matched the right information type (middle column-highlighted in green) to your columns from your spreadsheet. Additional info types may be in the right column (available fields), and those can be dragged to the left.
- Once you're satisfied that the right information is mapped to the right fields (not all fields must be used), click the green "Import" button.

Upload Products to my Account ×

Step 1 Step 2 Step 3

Upload your spreadsheet Map your data Preview and import!

A preview of your imported spreadsheet is shown on the left below. Mappable fields are available on the right.
Drag fields from the **right** to map them to your data on the **left**. Unmapped fields will **not** be imported.
[If you used a spreadsheet provided by CannTrade, use the Auto Map button below to automatically map fields.](#)

Auto Map Import

Please double check all fields to make sure automap didn't make a mistake!

Data Preview **Available Fields**

The first row in my spreadsheet is a header. Don't import it.

Market Cannabis Cannabis Cannabis	Market Product ✖	Department Product ?
Product Name (Product Name/Title)	Title Product ✖	Batch (#) e.g. 432567 Product

- Your products will appear!
- You can edit, duplicate, or add pictures or other information to your products from the grid OR by clicking into the product, making the changes, and clicking "save" at the bottom.
- Select all of your products by clicking the top checkbox above your products in the grid

☰ Listings

Filter by product ID or title... 🔍 🔗 Filters

Post a Product Upload Products

20 products ▾

<input type="checkbox"/>	Title	Market	Type	Price	Unit	Quantity	Batch #(s)	Available	Created	Visibility
<input checked="" type="checkbox"/>	501st OG	Cannabis	Flower and PreRolls	Hidden	1 g.	100000 g	--	in 8 months	04/18/2018	My Network
<input checked="" type="checkbox"/>	AHHH Brand OG	Cannabis	Concentrates	Hidden (Negotiable)	.20 g.	∞	1	Now	10/19/2017	Open Market
<input type="checkbox"/>	Agent Orange - Disposable Vape - Doozy	Cannabis	Concentrates	\$330.00 (Negotiable)	1 box	97976	--	Now	10/17/2018	Open Market
<input type="checkbox"/>	Agent Orange - Disposable Vape - Doozy	Cannabis	Concentrates	\$330.00 (Negotiable)	1 box	97870	--	Now	11/28/2017	My Network

- **Publish your products.** Click the green cloud icon to publish your products. We recommend publishing your products to the open marketplace (so all verified compliant buyers can see them), but you also have the option of limiting visibility to the businesses in your network.



Listsings

Filter by product ID or title...

Post a Product Upload Products

Previous Page 1 of 2 Next 20 products

<input type="checkbox"/>	Title	Market	Type	Price	Unit	Quantity	Batch #(s)	Available	Created	Visibility
<input type="checkbox"/>	501st OG	Cannabis	Flower and PreRolls	Hidden	1 g	100000 g	--	in 8 months	04/18/2018	My Network
<input type="checkbox"/>	AHHS Brand OG	Cannabis	Concentrates	Hidden (Negotiable)	20 g	∞	1	Now	10/19/2017	Open Market

- Click here to learn more about managing your products.

8. Link your Wholesale Storefront to your Website

CannTrade gives you the ability to have a verified wholesale cannabis storefront (or *just* your products & offerings) on your own website. It's really as simple as grabbing your wholesale storefront link, and then having your website manager connecting the link to a button on your site. (We recommend the button say "Wholesale" or "Buy Wholesale," or something similar.

Here is how to grab your wholesale link.

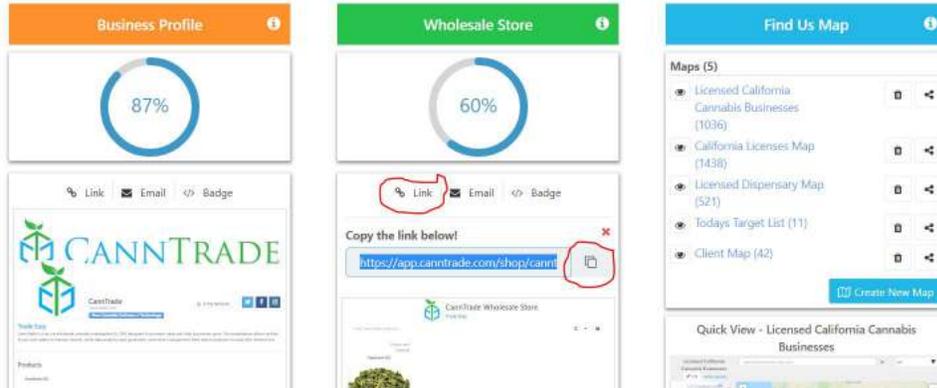
- Click on your logo (link & share) on the top left of the vertical menu.

A screenshot of the CannTrade dashboard. On the left is a vertical navigation menu with the CannTrade logo at the top, followed by a "Link & Share" button (circled in red), and other menu items like Dashboard, Orders, Product Listings, Requests, Proposals, Contacts, Business Network, Favorites, Messages, and Reports. The main content area on the right shows a "Shop Now" button, a "Support" dropdown, a "Dashboard" header, and a list of "Activities" including "Website did not exist" and "E-Mailed Contact Form".

- Click the "Link" button under the wholesale store, then click the icon to the right of the link to copy it!



Link & Share



- Once you have copied the link, send it to your web-person :)

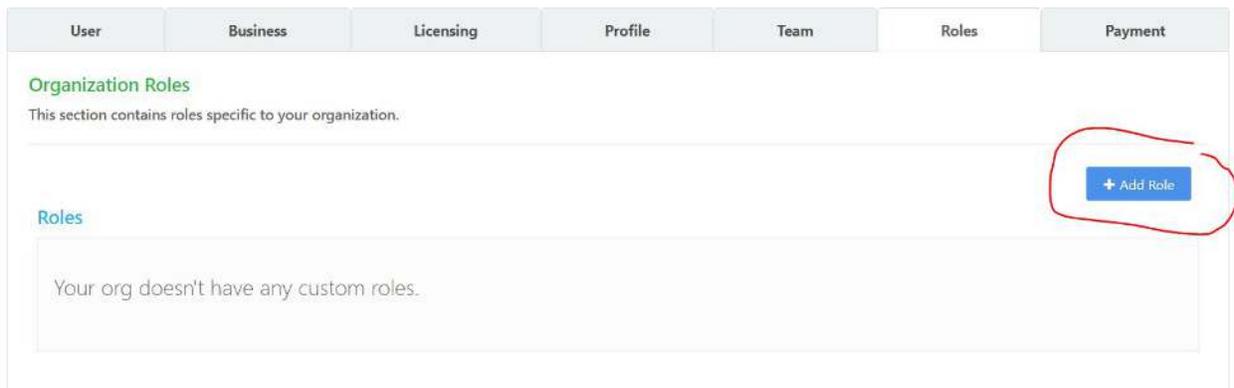
9. Roles and Permissions

Once team members have joined the account, you can apply roles to those users so they have the proper permissions.

- Click “Account” > “Roles”



- Click “Add Role”



- To Create a role, Name the role, enter a description, and select (by checking the checkboxes) the permissions the role should have. Be sure to click “Save” when done.



Create a role

Inventory Manager

Manages Orders, wholesale buying, inventory

Role Permissions

- Can edit all orders where your organization is the buyer or the seller
- Can view all orders where your organization is the buyer or seller
- Can view reports
- Create/invite user, create/grant/edit roles, remove users
- Enter contracts as a buyer
- Enter contracts as a seller
- Invite users to organization
- Remove users from the organization

Cancel Save

- Once you have created the roles you need, you can apply those roles to the user accounts.
- Click the “Team” tab.

User Business Licensing Profile Team Roles Payment

Team Information

If you are a user manager this section contains information about users belonging to your organization and collectives you are a member of. You can also refer a business below.

- Next to a user, select the correct role from the dropdown menu.

Active Members

Email	Name	Roles	Actions
Mark@CannTrade.com	Mark Restelli	Admin	<input type="checkbox"/> <input type="checkbox"/>
aholub@gmail.com	Adam Holub	Admin	<input type="checkbox"/> <input type="checkbox"/>
ashmariem85@gmail.com	Ashleigh Moulton	owner	<input type="checkbox"/> <input type="checkbox"/>

- Once selected, the role is active. There is no need to “save.”

10. Go!

This concludes the Quick Start Guide. You’re now ready to take advantage of the significant business opportunity presented by CannTrade. We’re happy to have you. If you have any questions about the above functions and features, or any other part of the CannTrade platform and markets, please reach out to us using support@cantrade.com.



Additionally, if you'd like a **demo** or **training session** for yourself, a business partner, or team member(s), please feel free to schedule one at your convenience by going to CannTrade.com and clicking on the **"Request Demo"** button.

We look forward to hearing from you.

Trade Easy!

The CannTrade Team

CannTrade.com

Support@CannTrade.com