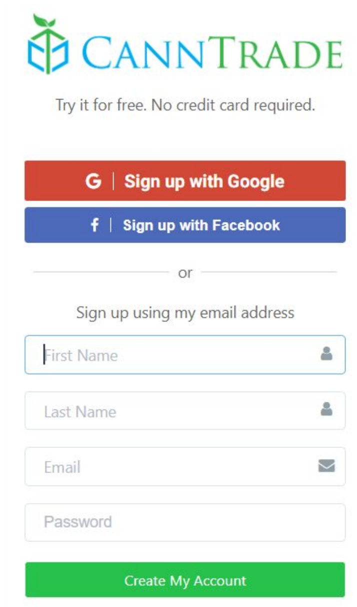
Quick Start Guide: Cannabis Businesses

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

1. Sign Up

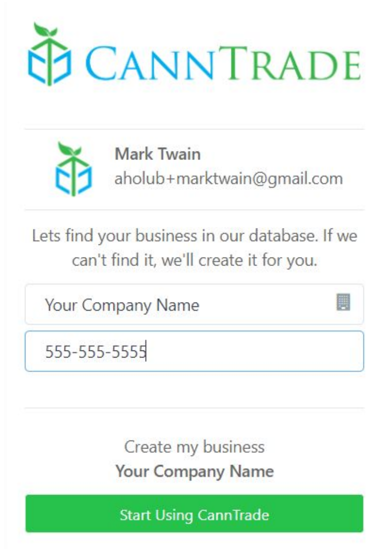
(If you already have a CannTrade account, login and skip this step)

➢ Go to https://app.canntrade.com/register, enter your name, email, and password, and click "Create my Account."



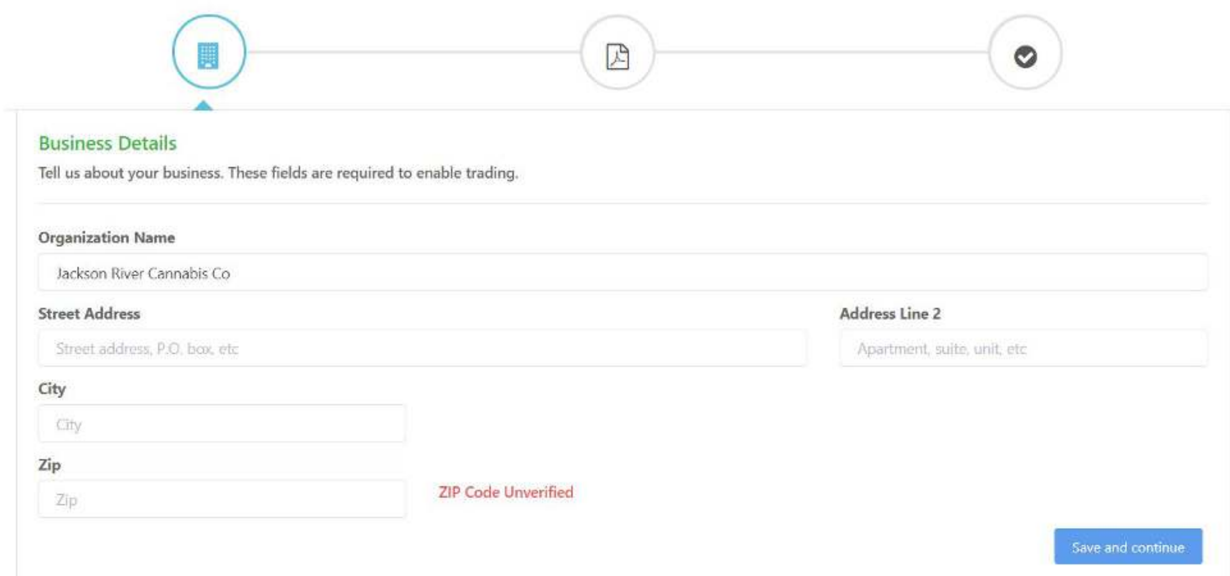
➢ Type the name of your business into the Company Name field. You can enter your licensed business name or your DBA. Your business may already be in our database. Once you begin typing, autosuggestions may appear below. If you see your business pop up, **click** on your business to claim it. *If your 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."



2. Complete Your Registration

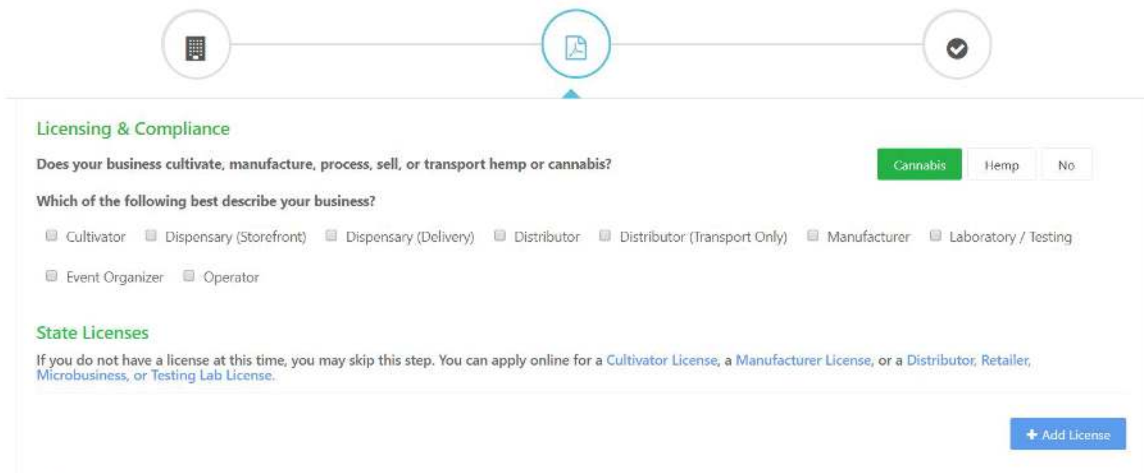
➢ Input your valid business Street Address, City, and Zip Code. Then click "Save and continue"



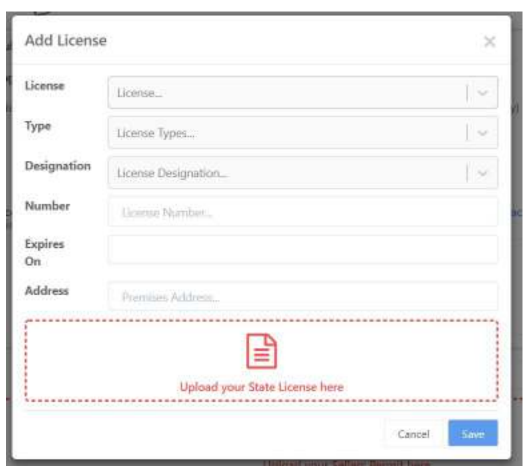
3. Upload License Documents

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.

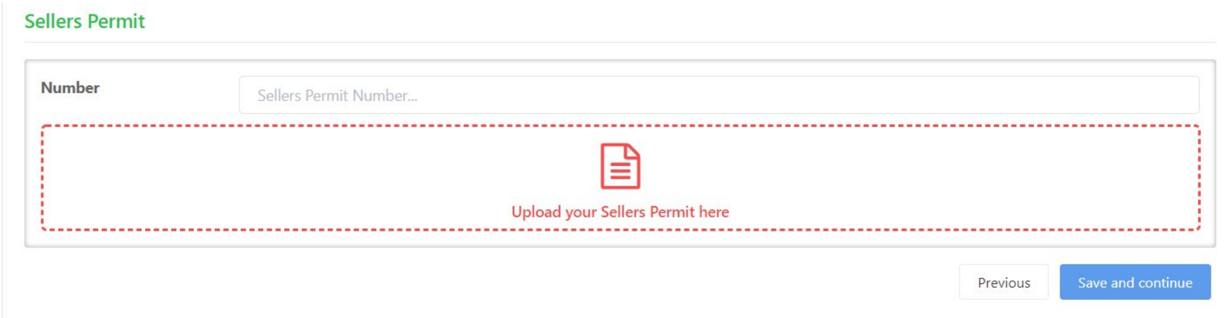
➢ In the Licensing Section, choose “Cannabis Business.” Then **check ALL the boxes** that pertain to your business operations.
➢ Click the “+ Add License” button.



➢ 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.”



➢ 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.”



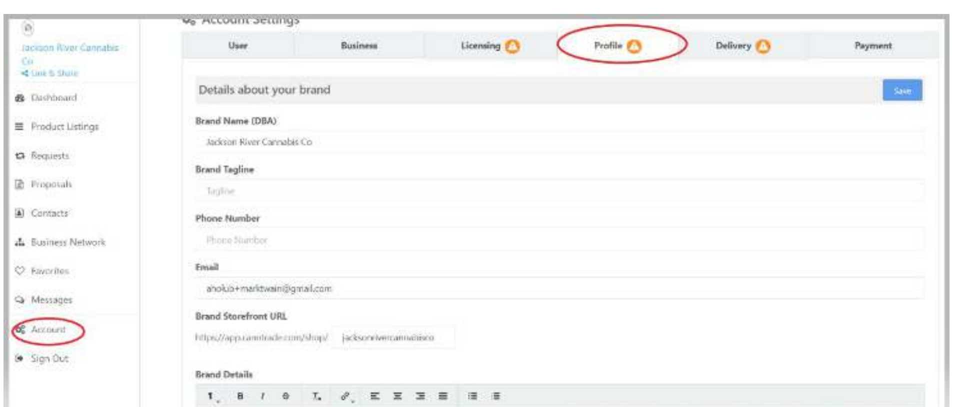
*note: If you ever want to return to the license section of your account after completing your registration, you may do so by clicking "Account" on the left vertical menu (near the bottom) and then clicking on the "Licensing" tab.

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@canntrade.com.

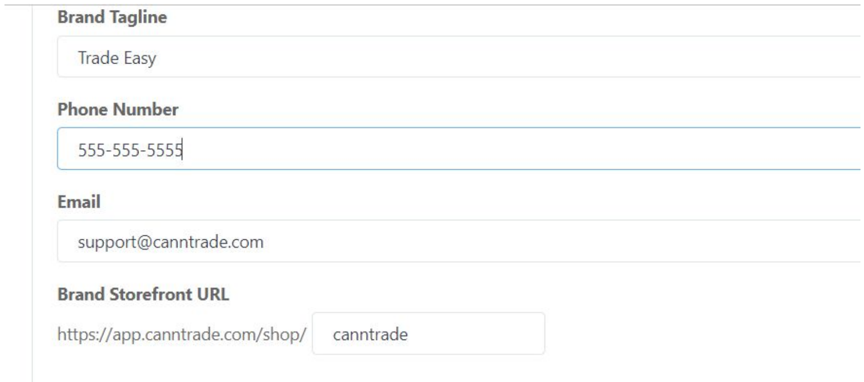
While you're waiting (or not), the best next step is to complete your profile.

➢ 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)



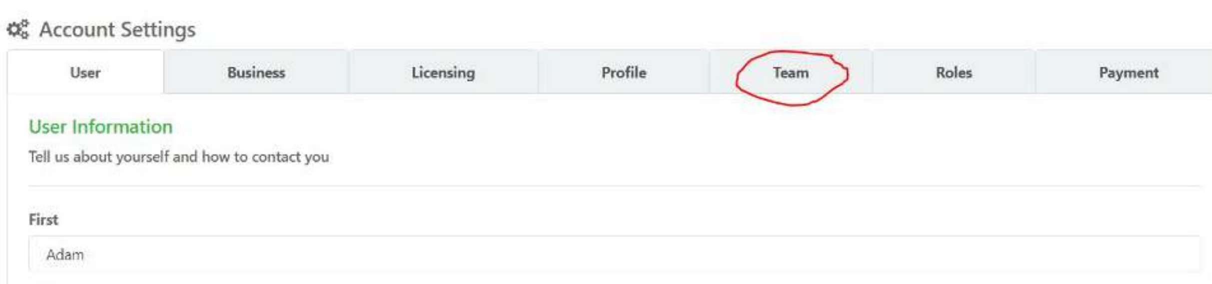
- ➢ **Upload your Banner:** (if you desire) by clicking the button. Once you crop and align your banner, click “Save.”

- ➢ **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.

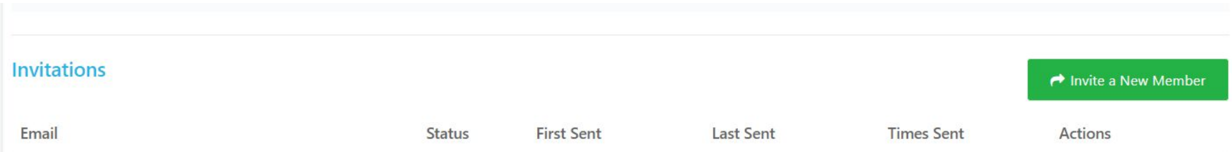
5. Add Team Members

Invite your team members to join your account!

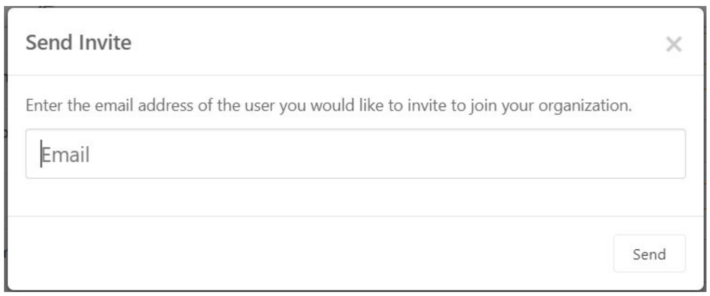
- ➢ Click “Account” > “Team”



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



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



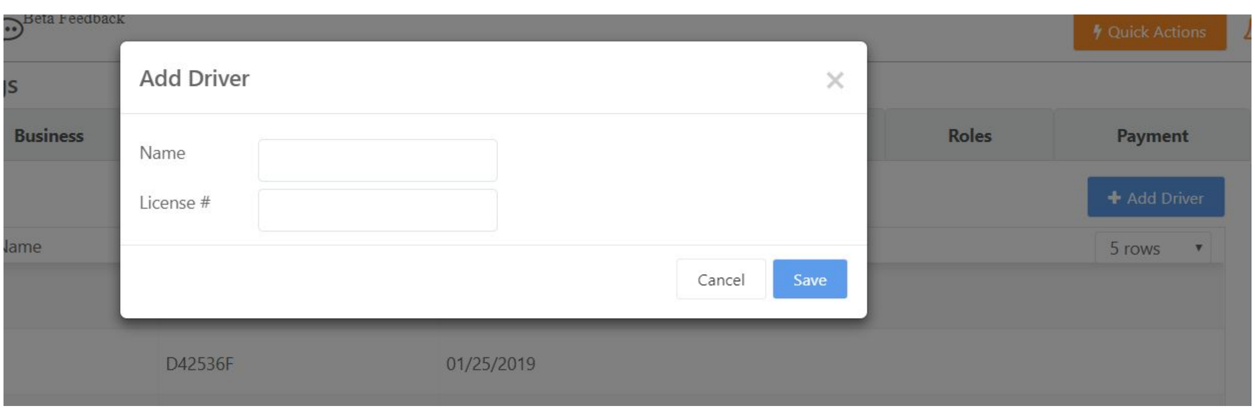
➢ Repeat above steps for additional team members.

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:

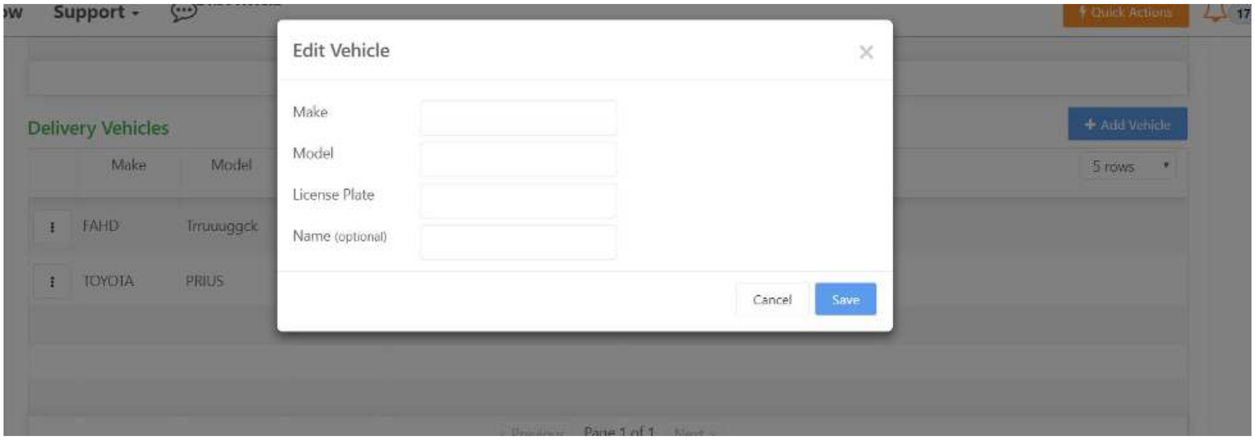
➢ Click “Account” > “Delivery” Tab

➢ 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.”

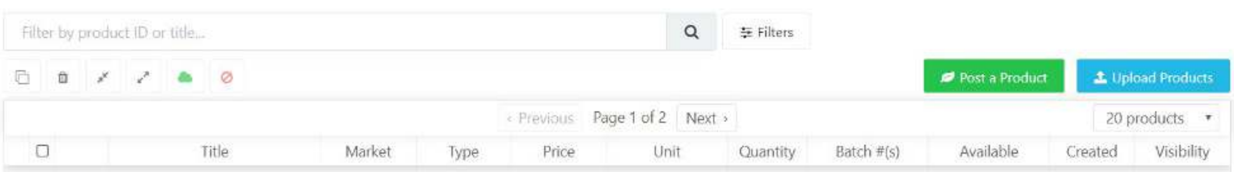


➢ Add additional vehicles as necessary. Then click “Save.”

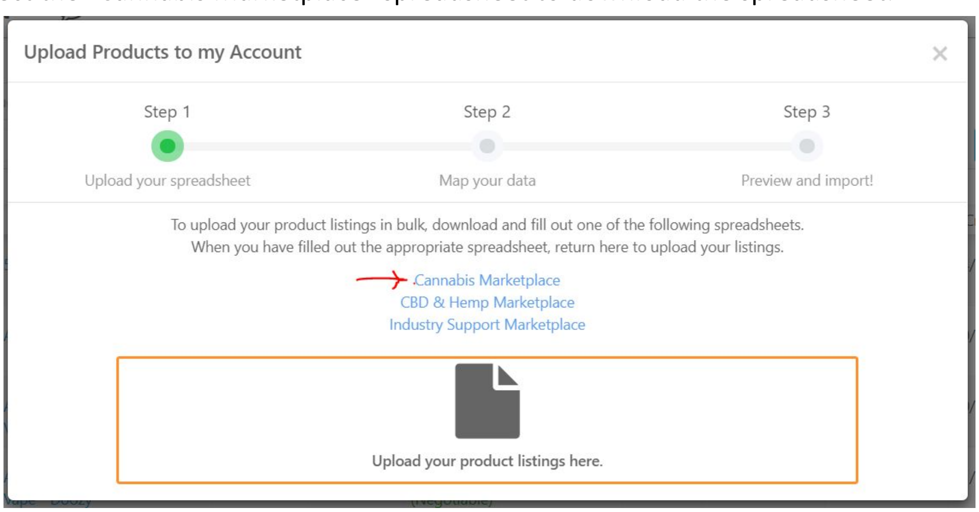
7. Upload Products via Spreadsheet

Note: You can always send your spreadsheets and product guides/pricing sheets to success@canntrade.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.



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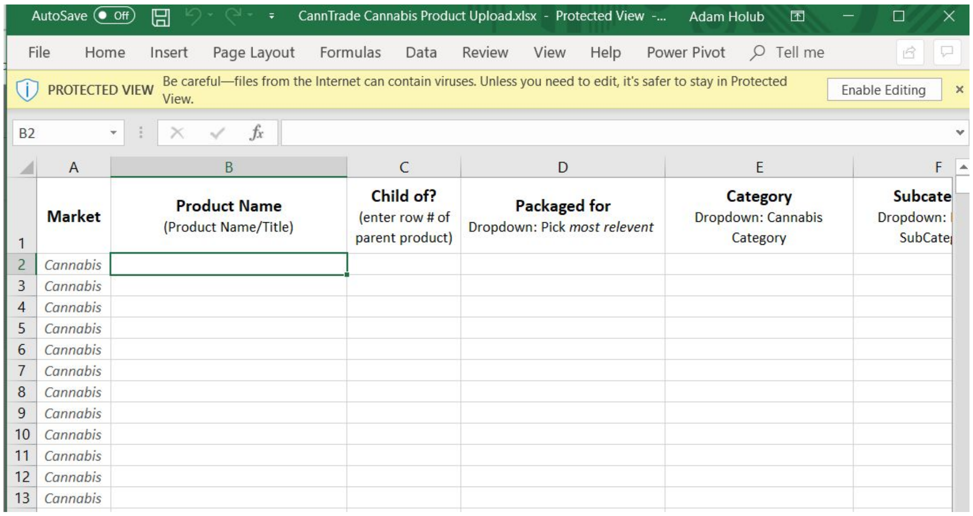
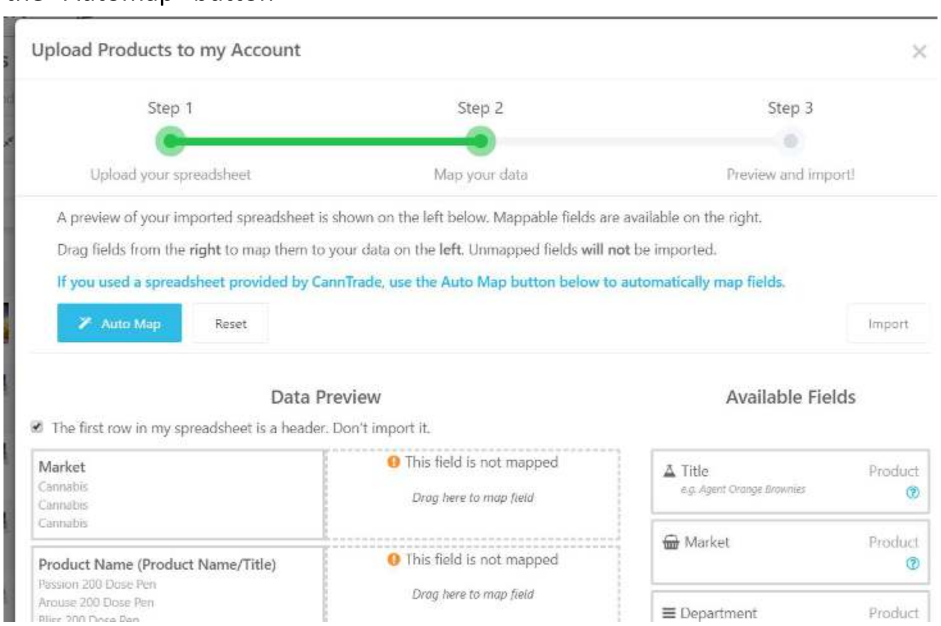
*hint, if you have non-cannabis products in addition to cannabis products (for instance, CBD only products), you will *also* want to download the other appropriate spreadsheets.

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

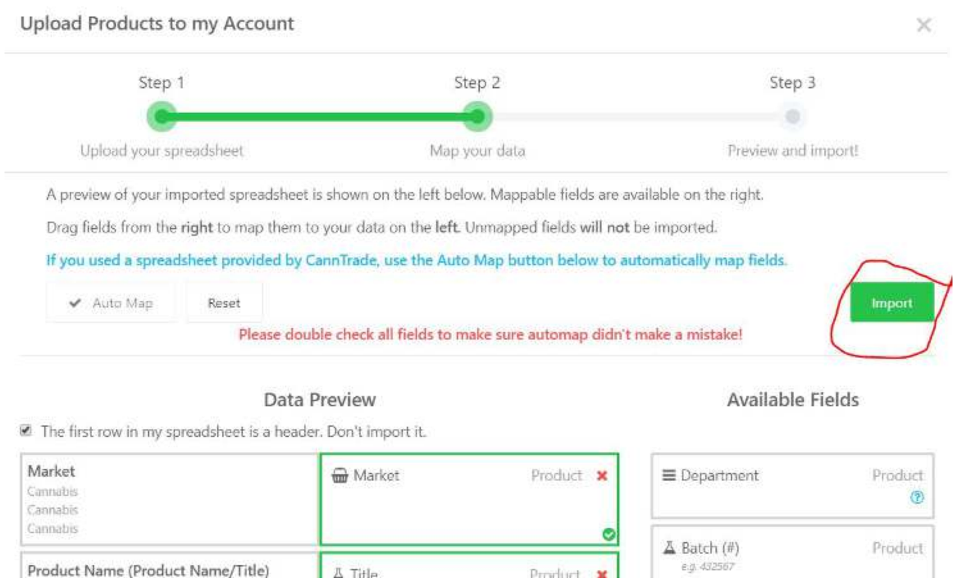


- Click "Save as" to rename your spreadsheet and save it.
- Fill out your spreadsheet with your products, with each product/SKU getting its own row. Click here for instructions on how to fill out your product upload spreadsheets.
- When you have finished entering your product information into the spreadsheet, 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



➢ 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.

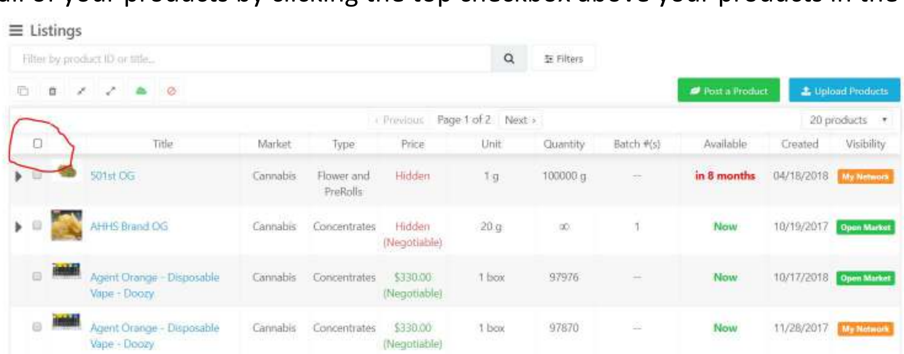
➢ Once you're satisfied that the right information is mapped to the right fields (not all fields must be used), click the green "Import" button.



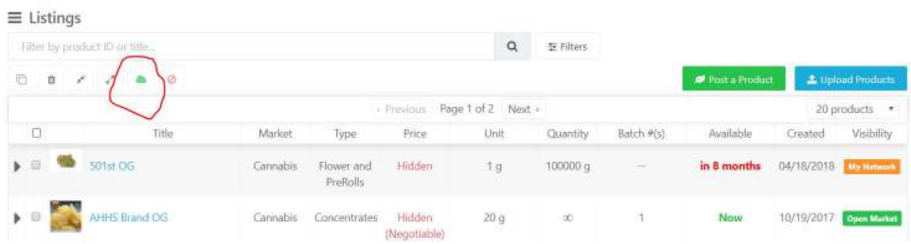
➢ Your products will appear!

➢ 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



➢ **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.



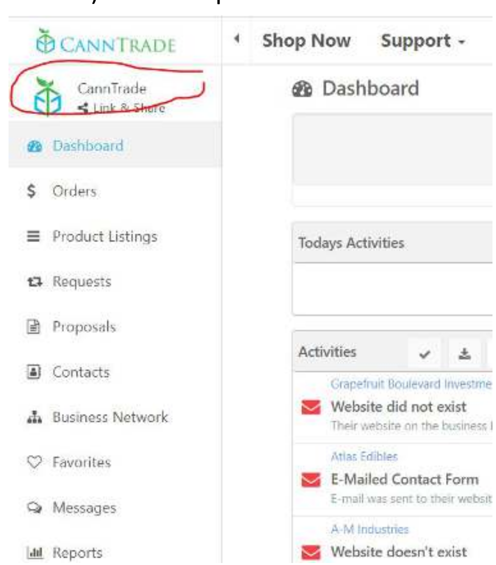
➢ Click here to learn more about managing your products.

8. Link your Wholesale Storefront to your Website

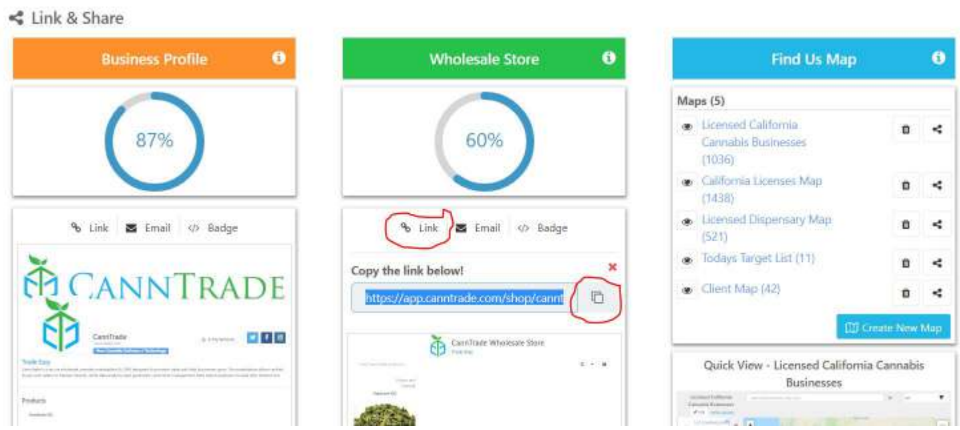
CannTrade gives you the ability to have a verified wholesale cannabis storefront (or *just* your products & offerings) on your own website. It's really as simple as grabbing your wholesale storefront link, and then having your website manager connecting the link to a button on your site. (We recommend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



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



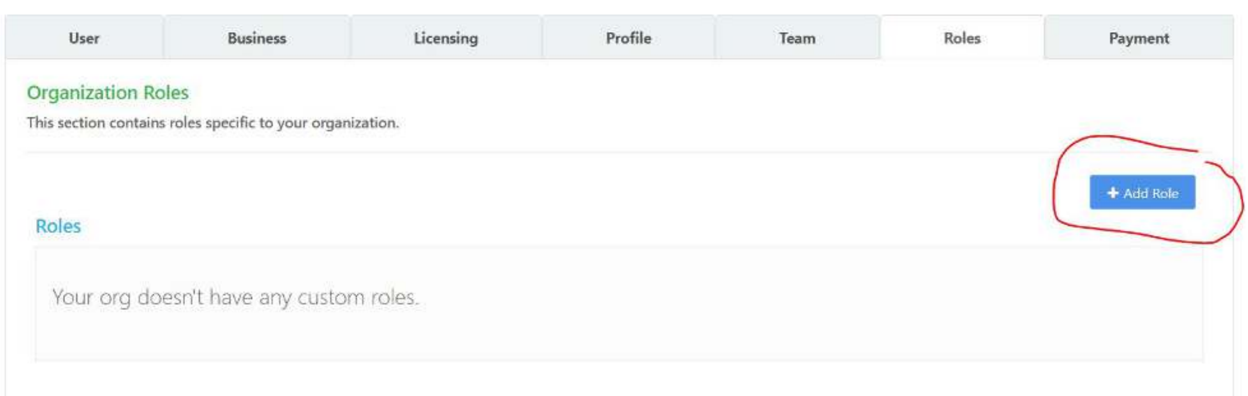
➢ Once you have copied the link, send it to your web-person :)

9. Roles and Permissions

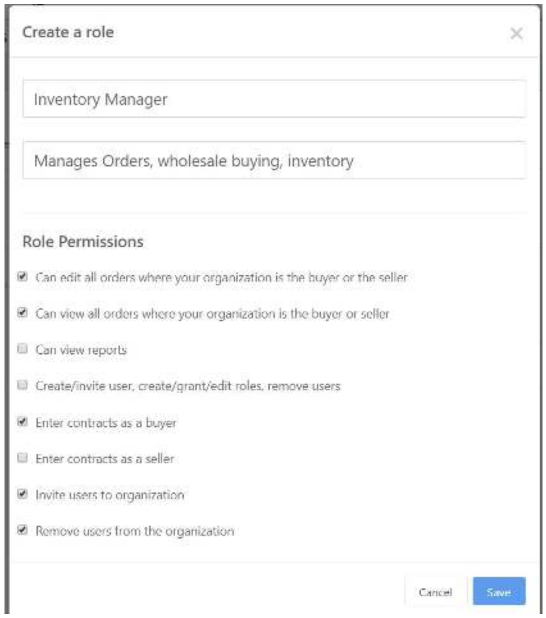
Once team members have joined the account, you can apply roles to those users so they have the proper permissions.

➢ Click “Account” > “Roles”

➢ Click “Add Role”

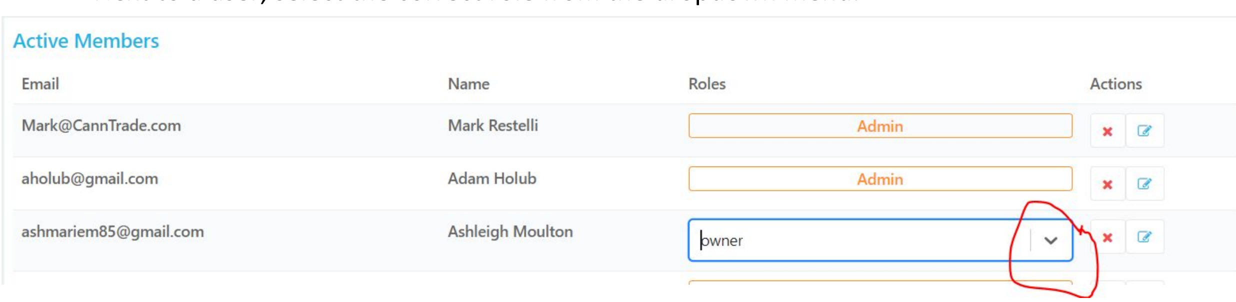


➢ To Create a role, Name the role, enter a description, and select (by checking the checkboxes) the permissions the role should have. Be sure to click “Save” when done.



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

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



- ➢ 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@canntrade.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