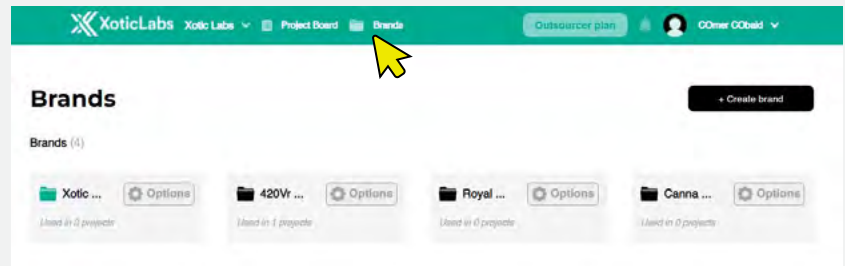


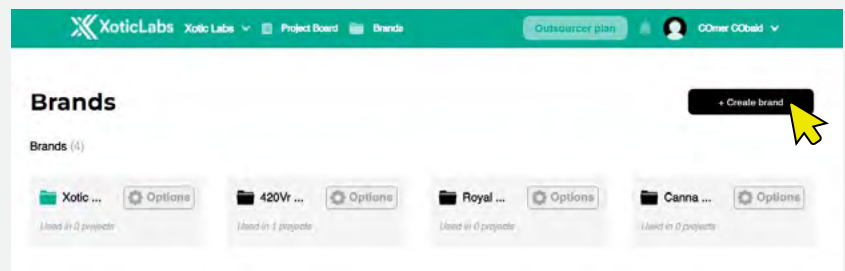
# Getting Started Guide

## Create a brand

Navigate to the Brands tab at the top of the Header Menu.



Select the '+ Create Brand' button in the top right of the page



A window will appear and walk you through the steps of creating a brand.

Required Information:

- Brand Name
- Industry
- Brand Description
- Brand Logo

A screenshot of the 'Create a brand' modal form. The form is white with a green border and a close button in the top right. It contains the following sections:

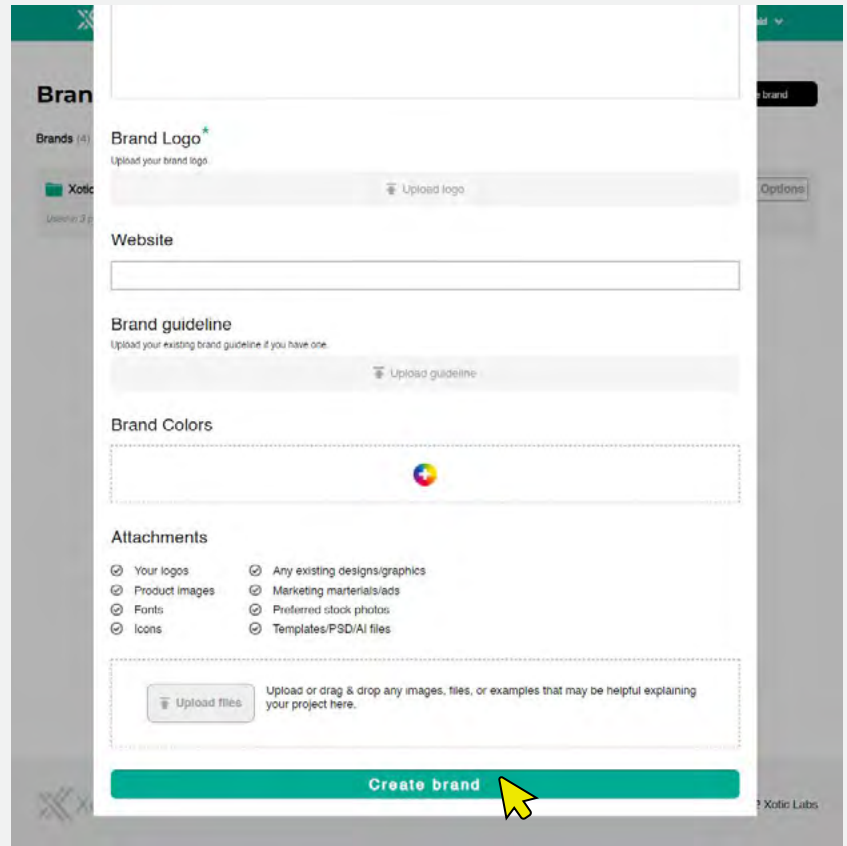
- Brand name\***: A text input field.
- What best defines your industry?\***: A grid of checkboxes for 'Cultivation', 'Extraction', 'Brand', 'Consulting', 'Design Firm', 'Distributor', 'Dispensary', 'Delivery', and 'Hemp/CBD'.
- What do you want to create?\***: A grid of checkboxes for 'Branding', 'Packaging Development', 'Print Design', 'Product Pictures', 'Social Media Images', and 'Digital Image Banner Designs', and 'Illustrations'.
- Description\***: A text area with a rich text editor toolbar (bold, italic, link, etc.) and the placeholder text 'Insert your text here'.
- Brand Logo\***: A section with the text 'Upload your brand logo.' and an 'Upload logo' button.

Additional Useful Information:

- Website
- Brand Guides
- Brand Colors
- Any helpful attachments such as
  - Product images
  - Fonts
  - Icons
  - Any existing designs or graphics
  - Marketing materials
  - Templates/PSD/AI Files

Once you have entered all of your applicable information, you can click the button at the bottom to 'Create Brand'.

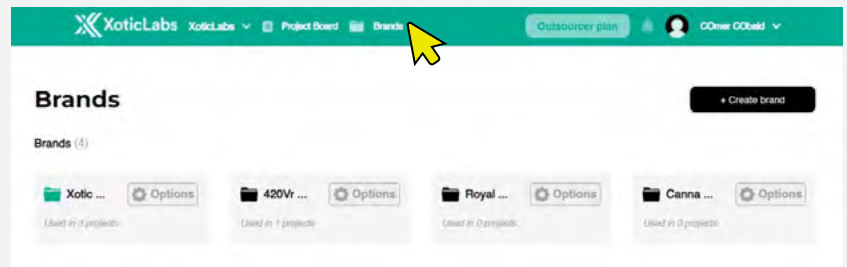
Your brand will now appear on your 'Brands' tab and can be selected for any project moving forward.



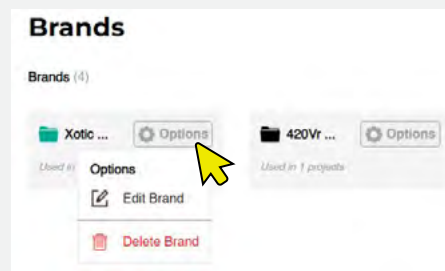
## Edit a brand

After a brand has been created, you have the ability to edit and change your brand at any time.

To do this, navigate to the 'Brands' tab from the top header menu.



Hover over the **Options** button on the brand you are trying to edit and select the 'Edit Brand' button that pops up in the menu.



This will take you to the same popup window that was used to create the brand originally. From here, you can change, add or remove any content associated with the brand.

**Edit brand**

A brand is a folder containing information and assets for anyone or anything that you need designs for regularly. Create a brand for clients, products, or use it to categorize and organize your design projects.

**Brand name\***

Xotic Labs

**What best defines your industry?\***

- Cultivation
- Consulting
- Dispensary
- Cannabis
- Extraction
- Design Firm
- Delivery
- Brand
- Distributor
- Hemp/CBD

**What do you want to create?\***

- Branding
- Product Pictures
- Illustrations
- Packaging Development
- Social Media Images
- Print Design
- Digital Image Banner Designs


**Description\***

Tell us about this brand. What product/service does it provide? What's special about it?

Paragraph

Your very own cannabis focused design team.  
Unlimited designs, one flat rate.  
Top shelf appeal.

**Brand Logo\***



**Website**

xoticlabs.com/test

**Brand guideline**

Brand guideline Remove

**Brand Colors**

- #01AAB1 Remove
- #000000 Remove
- #FFFFFF Remove
- #CCCCCC Remove
- #121212 Remove
- #2000F0 Remove
- #EEEE00 Remove

**Attachments**

- Your logos
- Product images
- Fonts
- Icons
- Any existing designs/graphics
- Marketing materials/ads
- Preferred stock photos
- Templates/PSD/AI files

Upload files Upload or drag & drop any images, files, or examples that may be helpful explaining your project here. 1 file(s) selected

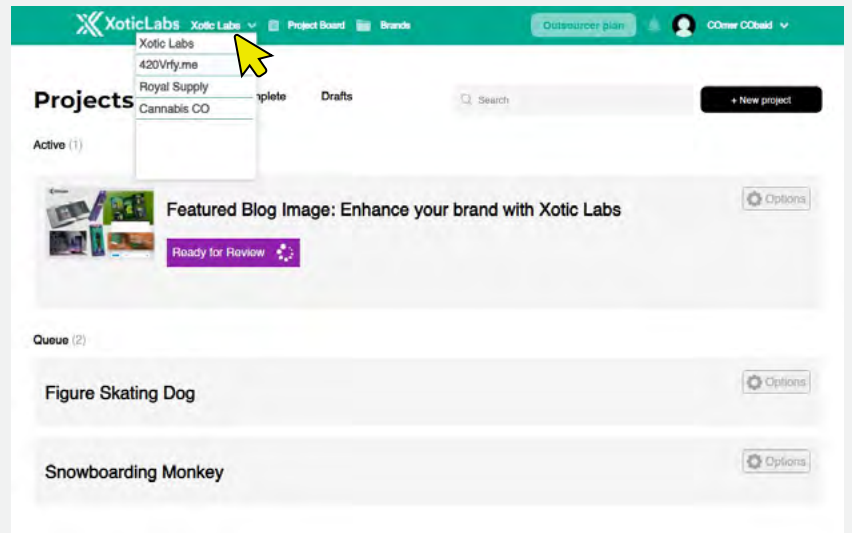
**Update brand**

# Change Brands

A brand is a folder containing information and assets for anyone or anything that you need designs for regularly. Create a brand for clients, products, or use it to categorize and organize your design projects.

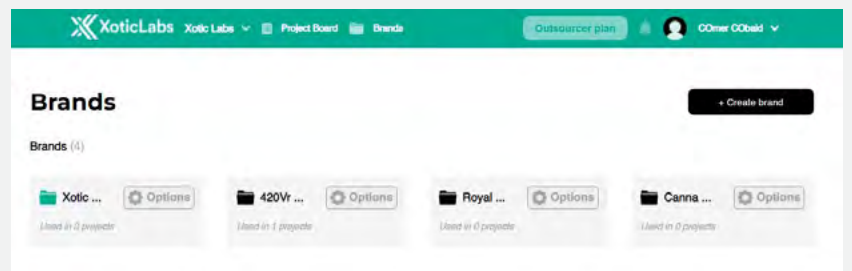
If your account supports multiple brands, you can change between brands to view the associated projects with that brand or create new projects for that brand.

To change brands, simply click the brand name in the top left corner and a dropdown will appear with an option to switch between them.



You can also change brands from the 'Brands' tab located in the header.

Select the brand you want to change to by clicking the Brand name.



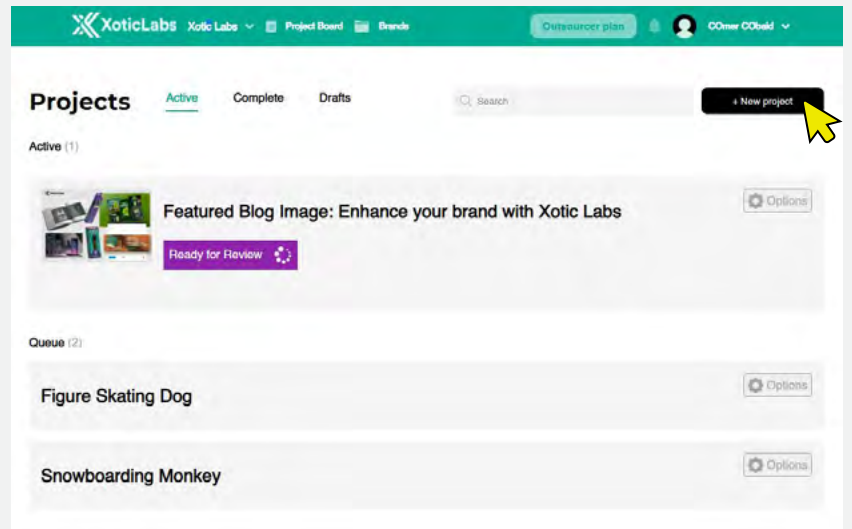
# Create a new project

Our project request form has been designed to easily allow you to convey any necessary details about your project to the designer.

Select your design request category so your design team has a clear understanding of what you're asking for and then provide a detailed description of the project in the box below.

It's important to be as detailed as possible here to be sure we can make the design you're looking for the first time!

The 'New Project' button can be found at the top right of your project board.



**Project Title:** Create a descriptive and identifiable title for your project.

**Design Category:** Select the requested category that fits your project type.

**Description:** Include any necessary project information and specific requests. It is important to provide a clear and detailed description to have the best results and avoid back and forth with revisions.

**Attachments:** Provide any relevant attachments to support your project request that your designers can reference. These attachments can include reference files, die lines, font files, specific imagery, etc.

**Requested File Type:** If you want a specific file type to be produced, select it in this section.

**Associated Brands:** Select the brand you would like to associate this project with.

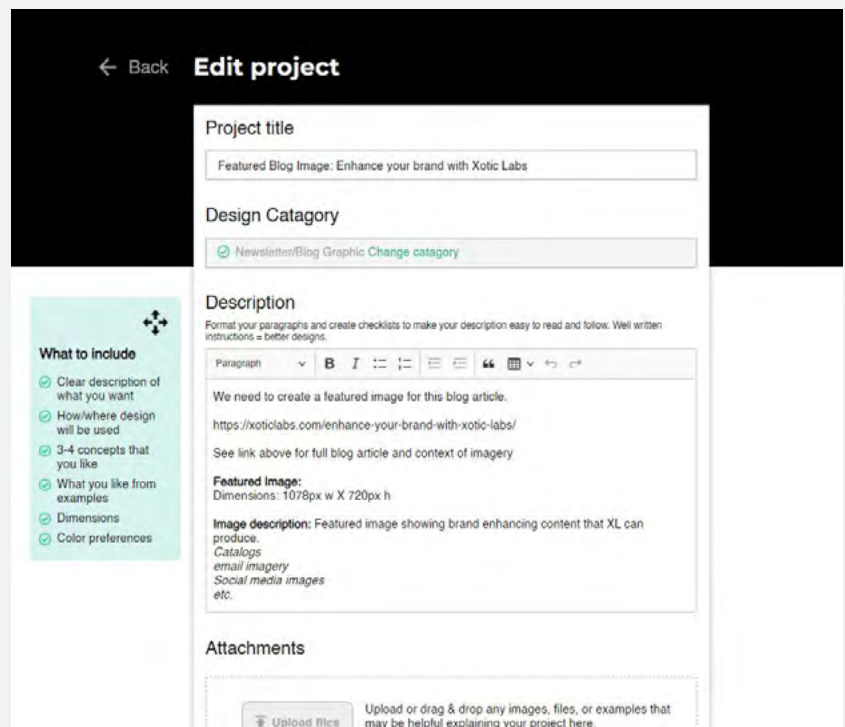
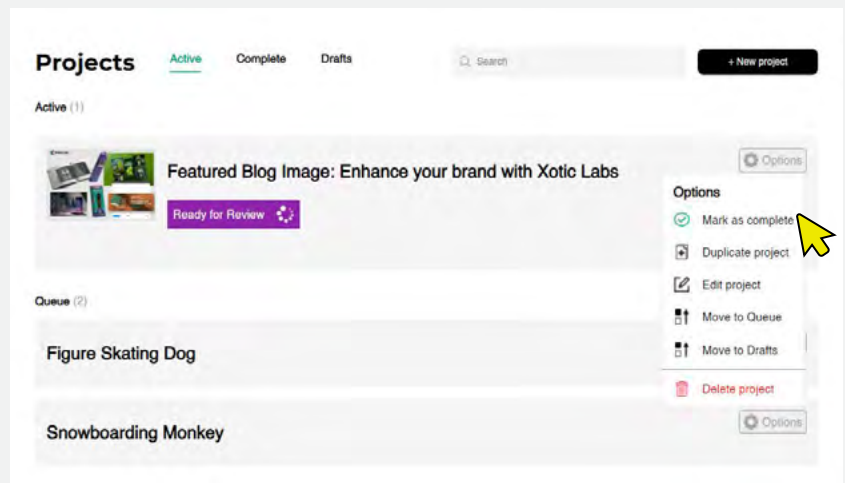
A screenshot of the 'Create a new project' form in the XoticLabs application. The form is titled 'Create a new project' and has a 'Back' button. It contains several sections: 'Project title' with a text input field containing 'Roller Blading Monkey'; 'Design Category' with a search input field; 'Description' with a rich text editor containing the placeholder 'Insert your text here'; 'Attachments' with an 'Upload files' button and instructions; 'File deliverables' with five radio button options: 'Any', 'Photoshop', 'Illustrator', 'inDesign', and 'PDF'; and 'Associated brand' with five selectable brand options: 'Xotic Labs', '420Vrly.me', 'Royal Supply', 'Cannabis CO', and 'New Brand'. At the bottom, there are two buttons: 'Create Project' and 'Save as Draft'. Callout boxes with dashed green borders point to the 'Project title', 'Design Category', 'Description', 'Attachments', 'Requested File Type', and 'Associated Brands' sections.

# Edit a project

Editing a project request has been made simple by being able to edit your request at any stage.

Navigating to the Options tab on your project, you can select the 'Edit Project' button at any time. This will bring up the original project request where you can add files or additional details in the description.

You can edit Active projects, projects in Queue, and projects in Draft.



# The Project Page

The Project Page is where you will manage all of your individual projects and communicate with the designers.

Features of Project Page:

- Project status management
- Designer communication
- Provide feedback on design submissions
- Download design files

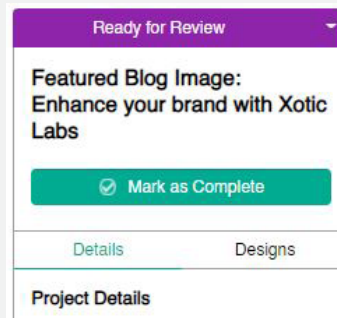


## Project Overview

The project overview is the window on the left hand side of the project page. This area contains all of the project details, status, and design files.

### - Project Status

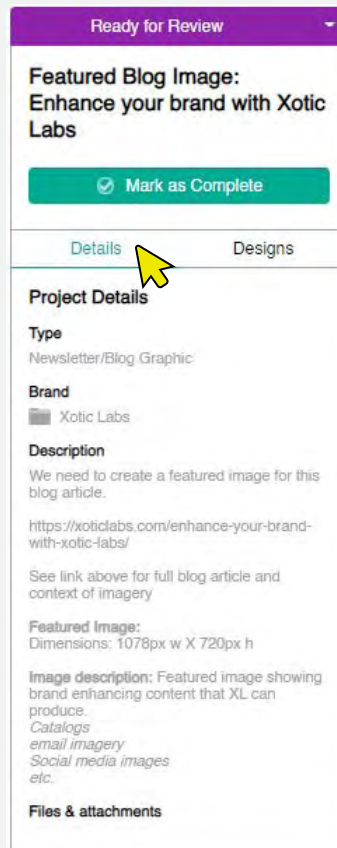
View or change the status of your project to manage your workflow or complete the project.



### - Details

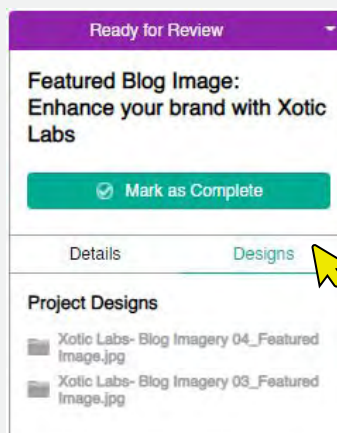
Review the Project Details on the 'Details' tab. The information shown here is what you added when you created the project. This includes and file attachments you loaded up as a reference.

You can edit your project at any time and the updates will be reflected here for the designer to review.



### - Design

The design tab is where all of the submitted designs from the designer will be located for easy reference and download.



## Project Status

Project status is an essential part of managing the workflow of your request with the designer.

Here is an overview of the Project Status'.

### Assigned to Team Not Started

**Description:** This is to indicate an Active project started by the Client has not started the design process, but has been assigned to a designer.

**Color:** Red

#### Allow manual transitions to the following statuses only:

##### First Draft in Design:

Permissions: (designer can set it to 'First Draft in Design')

##### Asset on Hold:

Permissions: (client can move the project to on hold at any time)

**How is status set:** When a new project moves from the Client's Queued projects to Active projects. The status will be automatically set to 'Assigned to team not started'.

**Who changes status:** The designer is responsible for updating the status to 'First Draft in Design'. This lets the client know that their project is actively being worked on.

#### Project location on project board:

Client: Active tab in the 'Active Section'

### First Draft in Design

**Description:** This status indicates that the first draft of the project is actively being worked on by the designer.

**Color:** Light Blue

#### Allow manual transitions to the following statuses only:

##### Ready for Review:

Permissions: (only Designer can move the project to 'Ready for Review' when the project has been submitted.)

##### Asset on Hold:

Permissions: (client can move the project to on hold at any time)

**How is status set:** When the Designer starts working on a new project, they will select this status to indicate to the Client they are actively working on their first draft.

**Who changes status:** The Designer is responsible for changing the status to 'Ready for Review' when they have submitted their first design file.

#### Project location on project board:

Client: Active tab in the 'Active Section'

### Ready for Review

**Description:** This notifies the client that the project has a submission and is ready for review. When the designer submits a design, the status is set to "Ready for Review".

**Color:** Purple

#### Allow manual transitions to the following statuses only:

##### Request Completed:

Permissions: (Client)

##### Asset Revisions:

Permissions: (Client)

**How is status set:** When the designer submits their designs, they will set the status as Ready for Review.

**Who changes status:** The Client is the only one who will move the status out of 'Ready for Review'.

#### Project location on project board:

Client: Active tab in the 'Active Section'



## Asset Revisions

**Description:** If the client doesn't approve the design submitted by the designer, they will mark the status as Asset Revisions after they are finished making their comments. It will stay in this status until the designer submits a new design submission and the status changes to 'Ready for Review'. This process continues until the project is marked "Request Completed" to be moved to the Completed tab.

**Color:** Blue

**Allow manual transitions to the following statuses only:**

**Ready for Review:**

Permissions: (only Designer can move the project to 'Ready for Review' when the project has been submitted.)

**Asset on Hold:**

Permissions: (client can move the project to on hold at any time)

**How is status set:** After the project is 'Ready for Review' if the customer has any revisions, this status will be set to indicate to the designer more work is needed.

**Who changes status:** The Designer is responsible for changing the status to 'Ready for Review' when they have submitted their first design file.

**Project location on project board:**

Client: Active tab in the 'Active Section'

## Request Completed

**Description:** The client will mark the project as Request Completed when the project is done and they are satisfied with the design submission.

**Color:** Green

**Allow manual transitions to the following statuses only:**

**How is status set:**

**Who changes status:**

**Project location on project board:**

Client: Completed Tab

## Draft

**Description:** The project can be in draft status until it is launched and added to the Queue or Active projects for the client.

**Color:** Grey

**Allow manual transitions to the following statuses only:**

**Assigned to Team Not Started:**

(Client can make the project active which will begin the same workflow as creating a new project)

**How is status set:** When a customer is creating a new project, they can set the project to Draft Status.

**Who changes status:** The client is able to move a Draft project to an Active status at any time. Moving a Draft project project to Active will start it in the same workflow as a normal active project where it gets added to their design Queue or made as an Active project if there is space in their allowed requests.

**Project location on project board:**

Client: Drafts Tab

## Asset on Hold

**Description:** At any time, the client can defer the project and move it to the draft tab and put the project on hold. Putting the asset on hold will pause the project and move it to Drafts, *not move it to the Queue*.

**Color:** Yellow

**Allow manual transitions to the following statuses only:**

**Assigned to Team Not Started:**

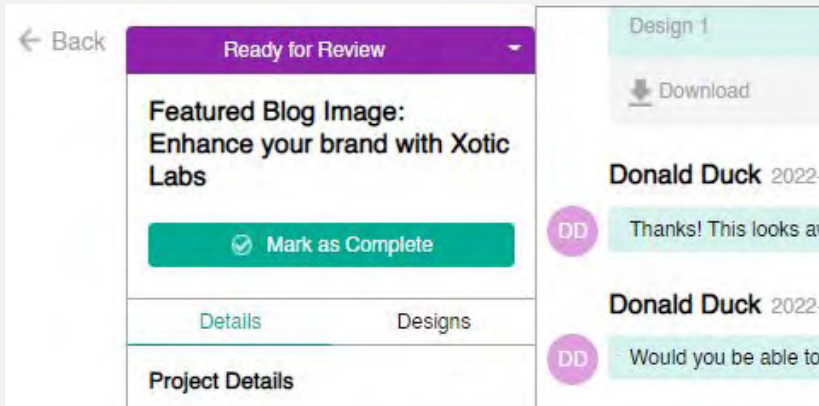
(Client can make the project active which will begin the same workflow as creating a new project)

**How is status set:** At any time, the client can defer the project and move it to the draft tab and put the project on hold.

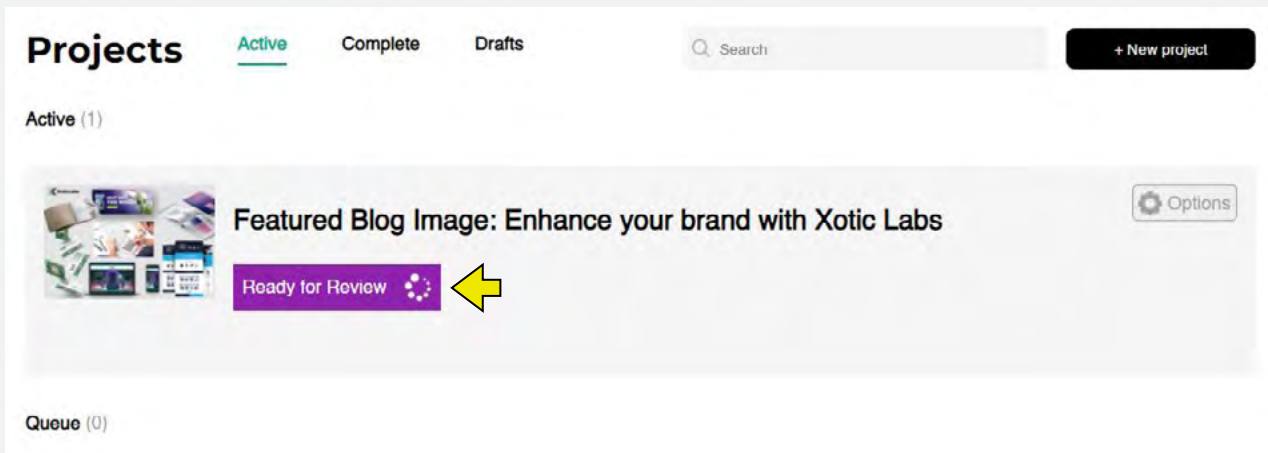
**Who changes status:** The client is able to move a project On Hold to an Active status at any time. Moving an On Hold project to Active will start it in the same workflow as a normal active project where it gets added to their design Queue or made as an Active project if there is space in their allowed requests.

**Project location on project board:**

Client: Drafts tab



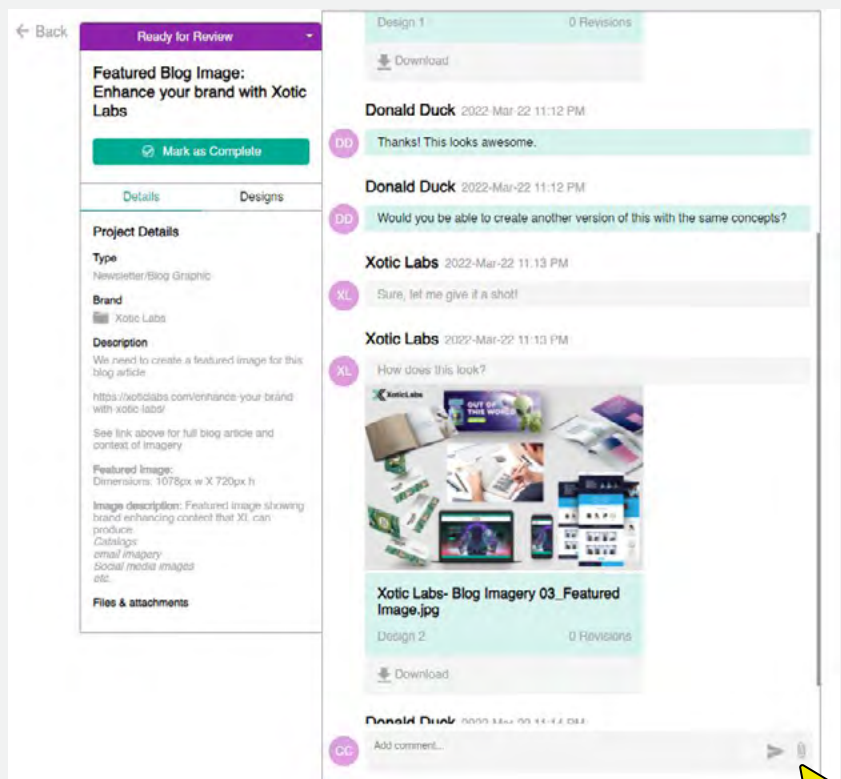
The project status for your project is also reflected on the main Project Board for easy reference.



## Designer Communication

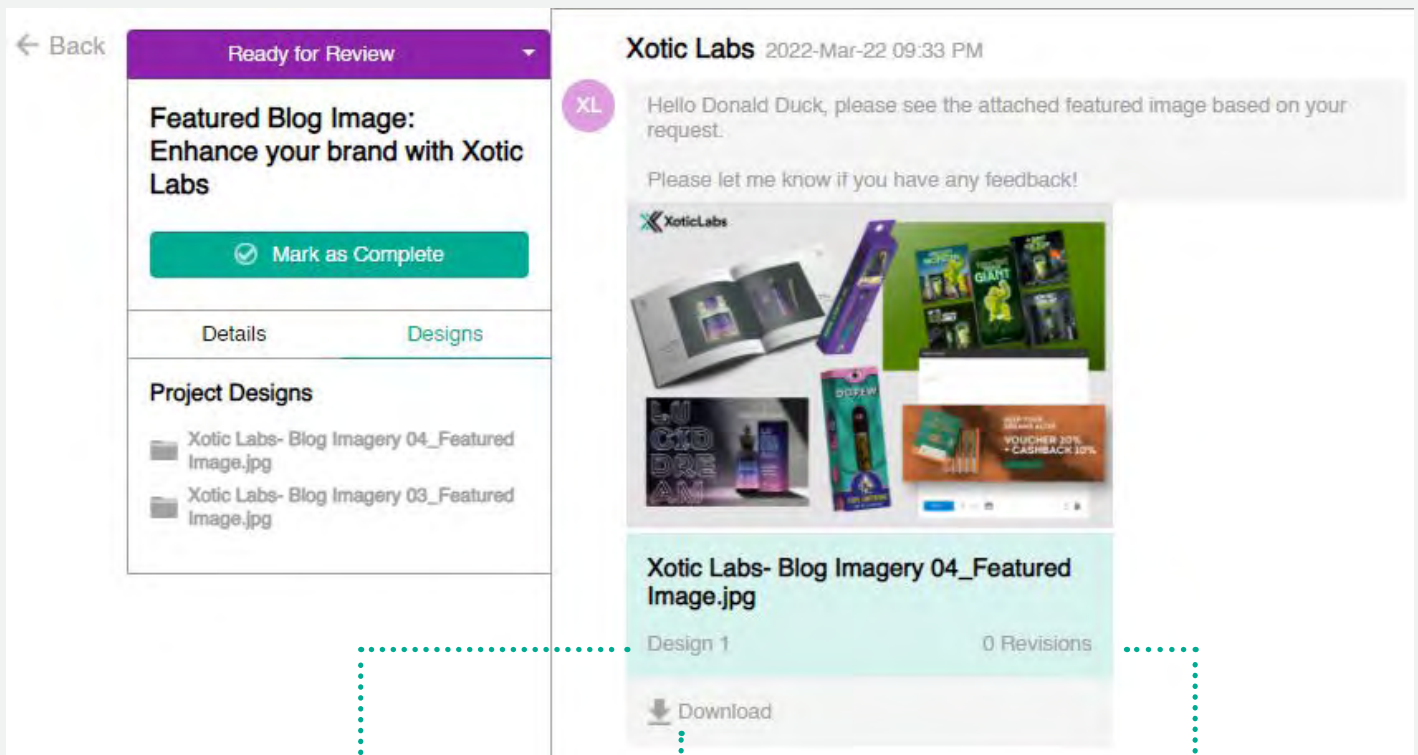
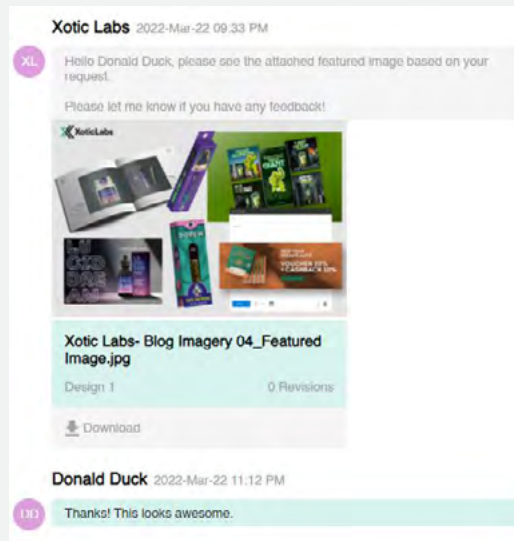
Communicating with your designer has been made easy through the Chat feed on your Project Page. At any time during your project, you can make comments and provide feedback to your designer regarding your design request.

You can upload additional reference files by attaching a file to your comment. These files will be seen by your designer and saved in the 'Details' tab under 'Files & Attachments' section of the Project Overview area.



## Submitted Designs

Whenever a designer submits a design for review, the following information will be displayed.



**Design:** The number shown here is the design version that has been submitted for this project. If 3 design versions have been submitted, you will be able to see that.

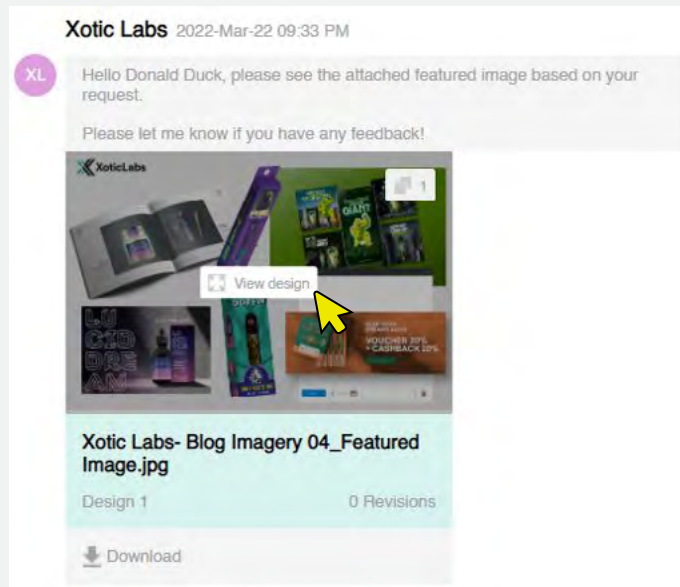
**Download:** This button allows you to download and save this specific design file for your records.

**Revisions:** This number reflects the number of times this specific design version has been revised. Design 1 may have been changed 3 times based on the comments you made previously. The file uploaded will reflect this.

## Commenting on submitting designs

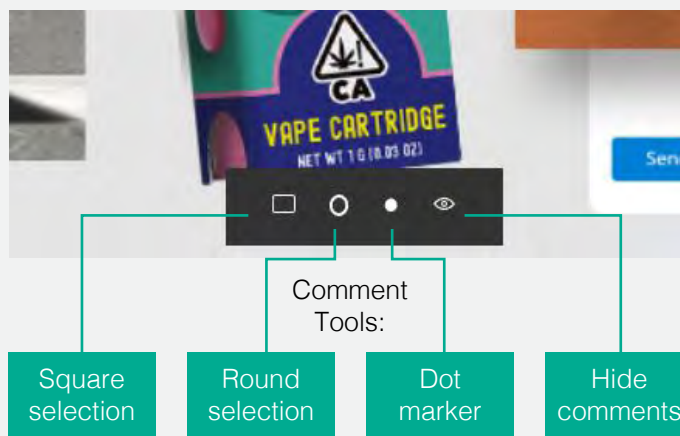
When a designer submits a design for review, you can either make general comments in the main chat feed, or you can make notations directly on the file itself.

To do this, navigate to the design you're wanting to comment on and select 'View Design' after hovering over the image.



Clicking 'View Design' will bring you to a new window with the file displayed along with notation tools that can be found at the bottom of the image page.

Select a comment tool and highlight the area you wish to comment on. After selecting your area, make your comment and press submit. Your designer will now be able to see the specific call outs and revision requests you make.



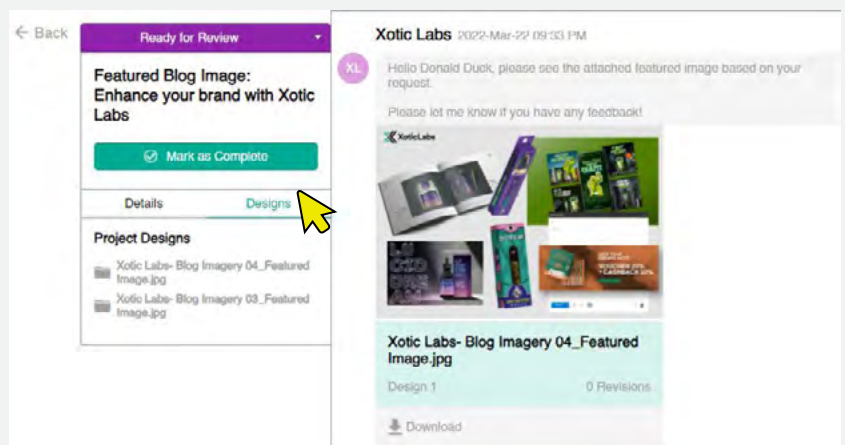
## Downloading design submissions

As long as you have an active account, at any point during the design process, you can download any of the submitted design files provided by the designers.

You can also access any of your design files from your completed projects when your account subscription is on Pause.

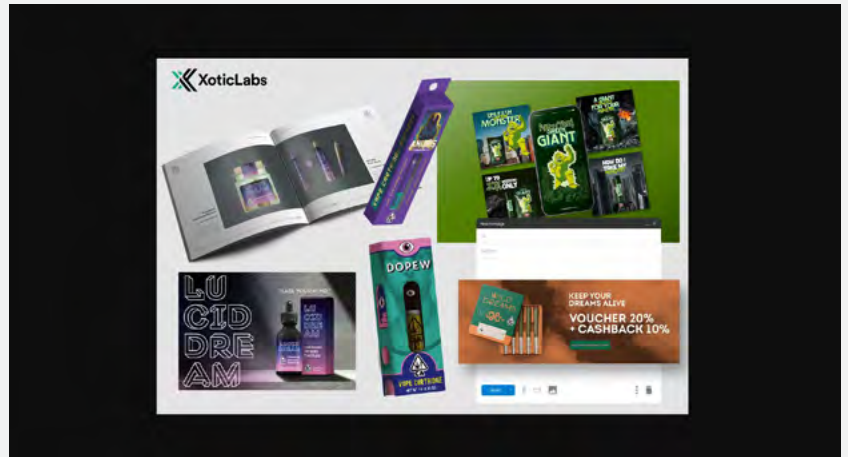
Step 1. Navigate to the project page.

Step 2. Select the 'Designs' tab in the Project Overview sidebar

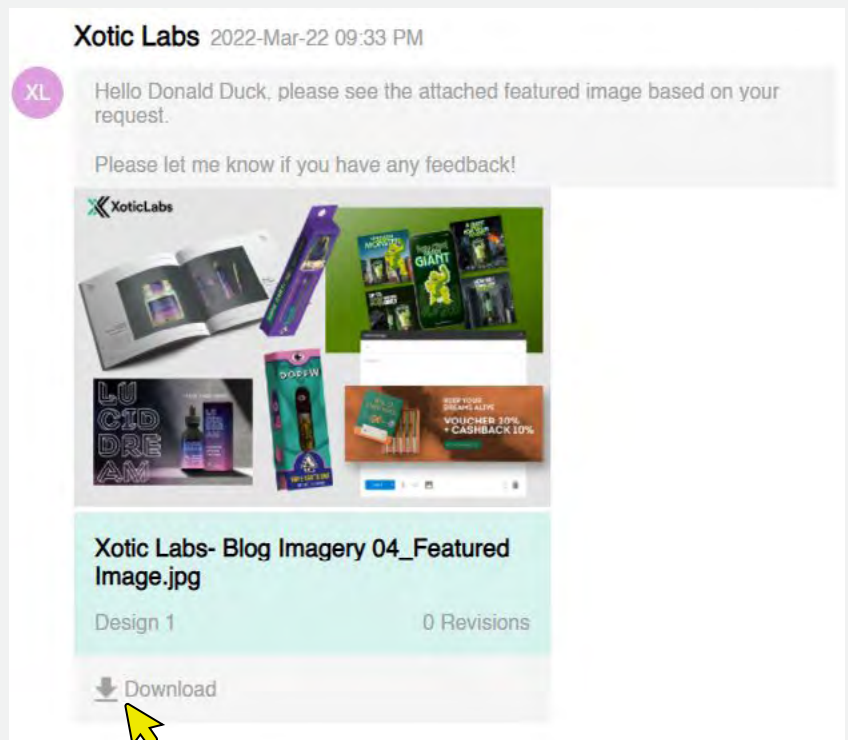




Step 3. Choose the design file you want to download.



You can also download any design file directly from the chat feed by clicking the 'Download' button on the image you're looking for.

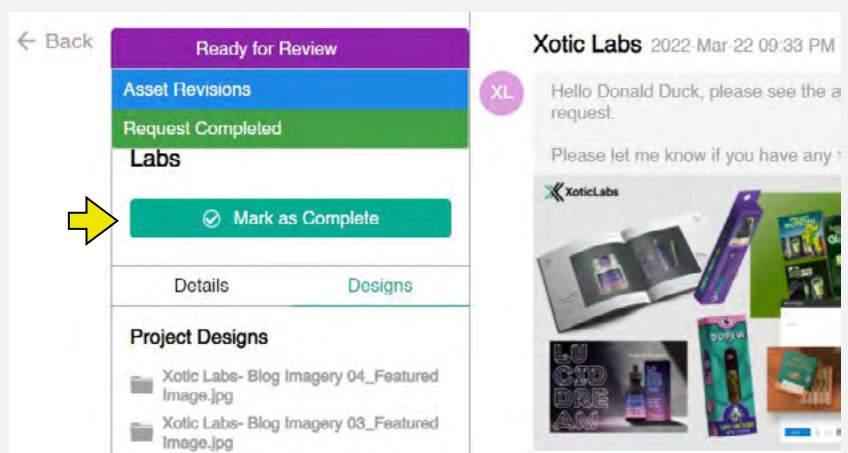


## Completing a Project

At any time, you can mark a project as completed to finish it and make room for your next design request.

Completed projects will be moved to the 'Complete' tab on your project board. You will still have access to all of the design files and can even re-open the completed project if you need to work on it again.

Mark a project as completed using the Status Dropdown or selecting the 'Mark as Complete' button on the Project Overview section.



# Your Project Board

Your Project Board is a simple way for you to navigate between the projects and manage your design queue.

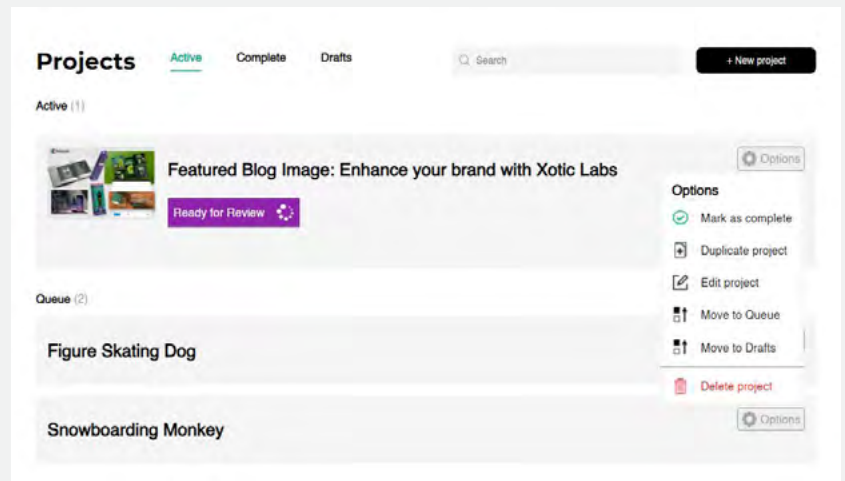
The Project Board is broken down into 3 tabs

- **Active:** These are the active design requests currently being worked on, or in queue ready to be made.
- **Complete:** You can access your completed projects in this tab.
- **Drafts:** Projects that you're still working on creating can be saved as drafts to be worked on later. Draft projects will be kept out of your design queue, so if you want to put any project on pause, it will be moved to the Drafts tab..

## Project Options

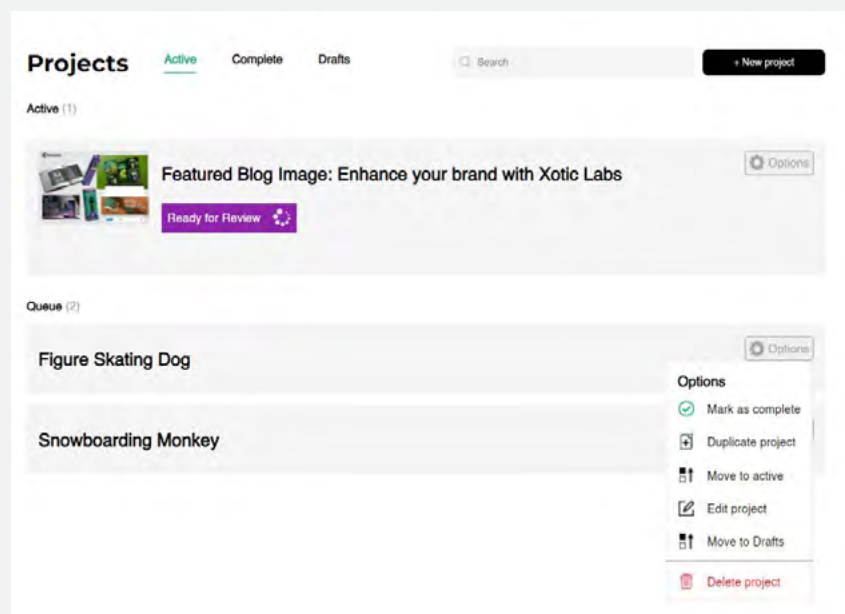
### Active

- Mark as complete
- Duplicate project
- Edit Project
- Move to Queue
- Move to Drafts



### Queue

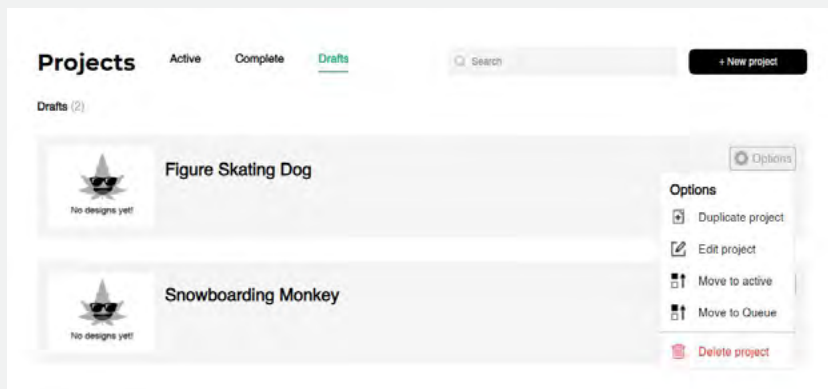
- Mark as complete
- Duplicate project
- Edit Project
- Move to Active
- Move to Drafts





## Drafts

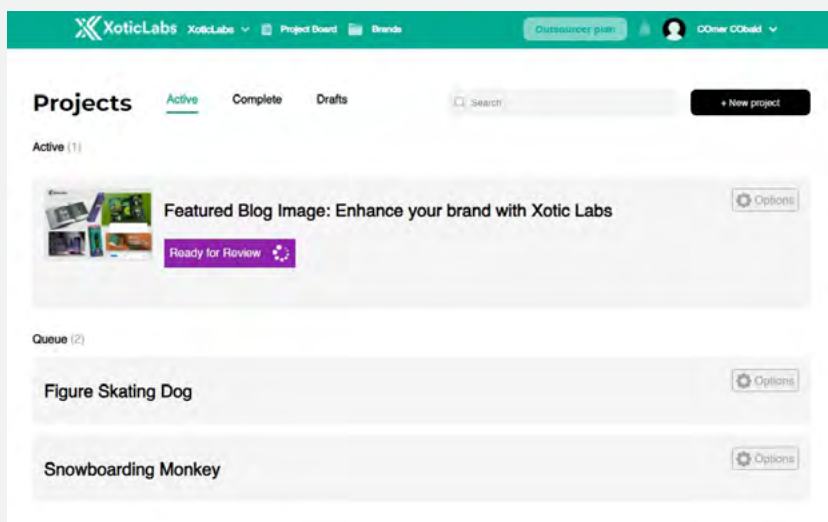
- Duplicate Project
- Edit Project
- Move to Active
- Move to Queue



# Manage your Design Queue

Depending on your plan you're allowed to have a certain amount of design requests active at once.

If you have multiple requests, you can queue them up to automatically start when your active project is completed.



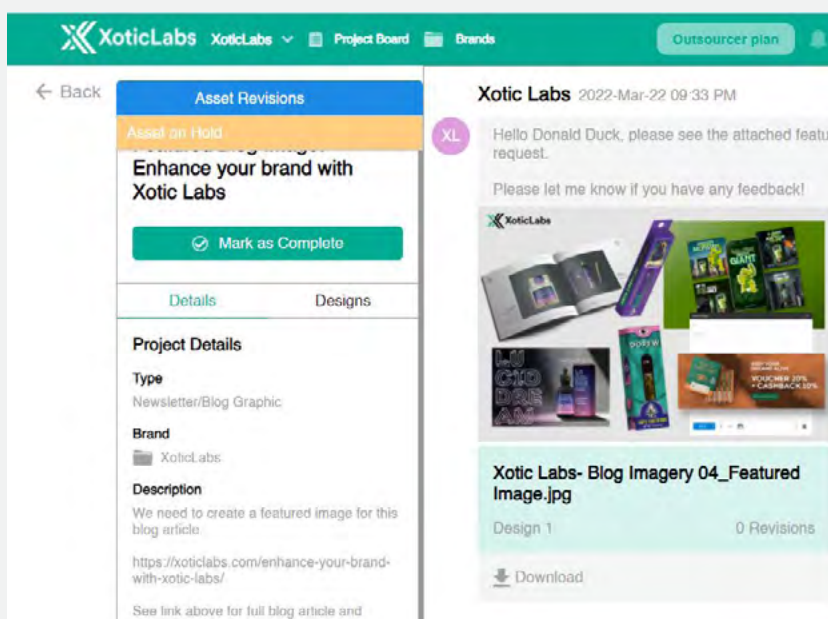
## Pausing Active Projects

At any time, you can either set your project to Hold or move it to the Queue. If you set your project to Hold, it will move the project to the Draft tab. From there, you can move it back to Active or your Queue.

Move active project to design queue  
Select the 'Options' button on the right side of the project bar.

Putting a project on 'Hold'  
From the Project Board, change the status of the design to 'On Hold'.

This will move the project out of your design queue and move it to your Drafts section to be used later.

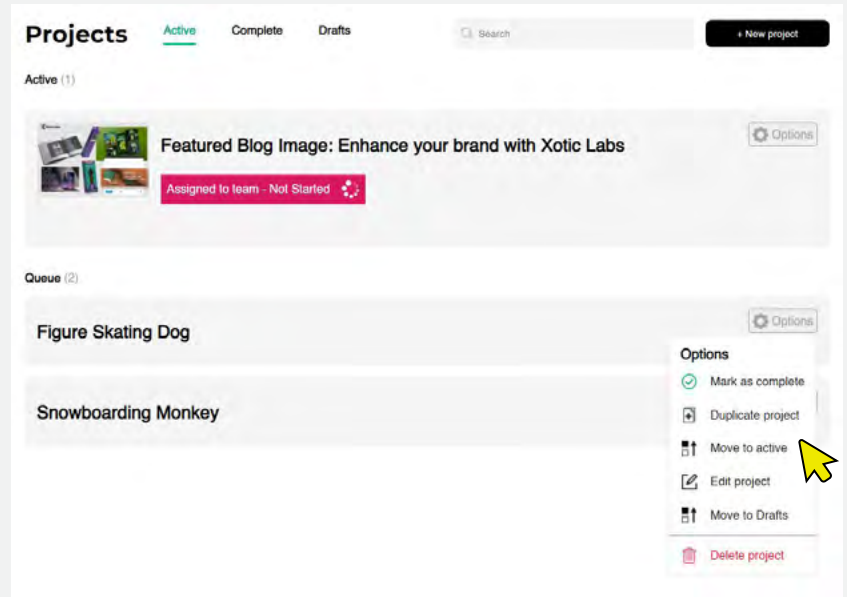


## Moving a project from the Queue to Active

If you want to make a new request in your queue a priority, you can swap a project from your queue with one of your active projects.

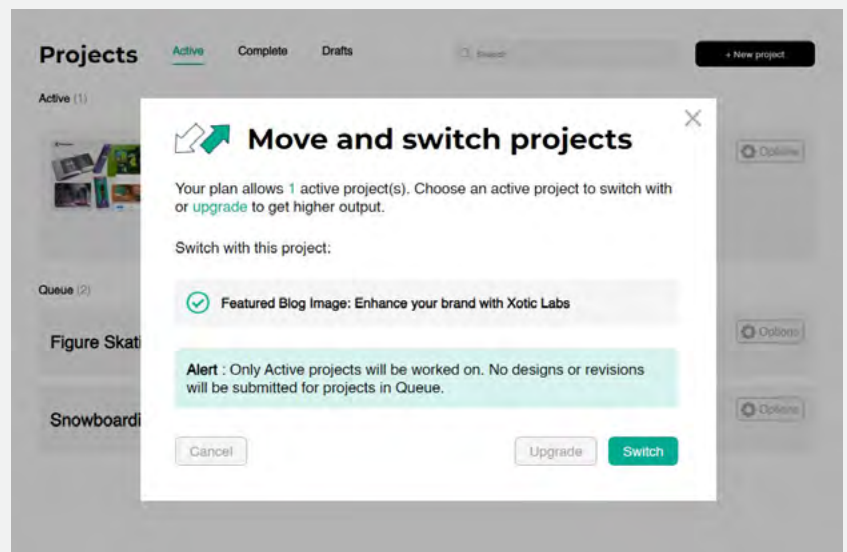
This will move the Active project to your Queue and the project in Queue will now become an Active project.

Navigate to your project board and select the 'Options' button on the project you want to make Active.



Depending on your subscription plan and current active projects, you may be required to replace the project you're moving to one already in active status.

When you switch out the active project with the new one, the original active project will be moved to the Design Queue.

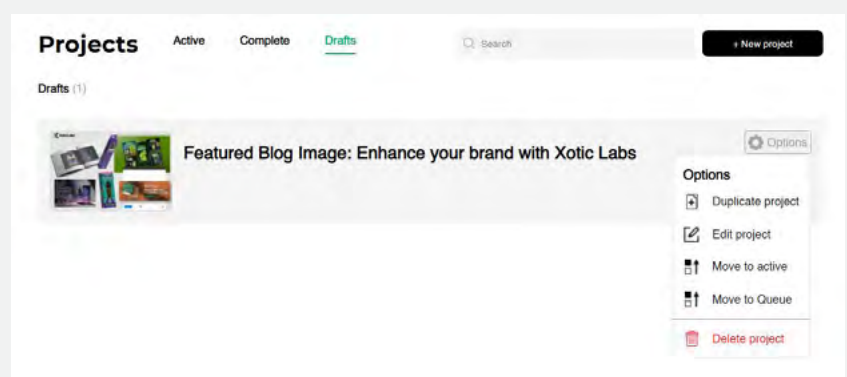


## Move a Draft project to Active or in Queue

Projects in the Draft tab is a way for you to manage your projects you're still scoping out, or just have on hold for when you're ready to work on them.

Draft projects can be moved straight to an Active project and swapped with a current Active project, or it can be moved to your Queue to be put in line with the rest of your Queue.

Navigate to the 'Drafts' tab on your Project Board and select the draft project you want to update. Select the 'Options' button on the project to manage it.

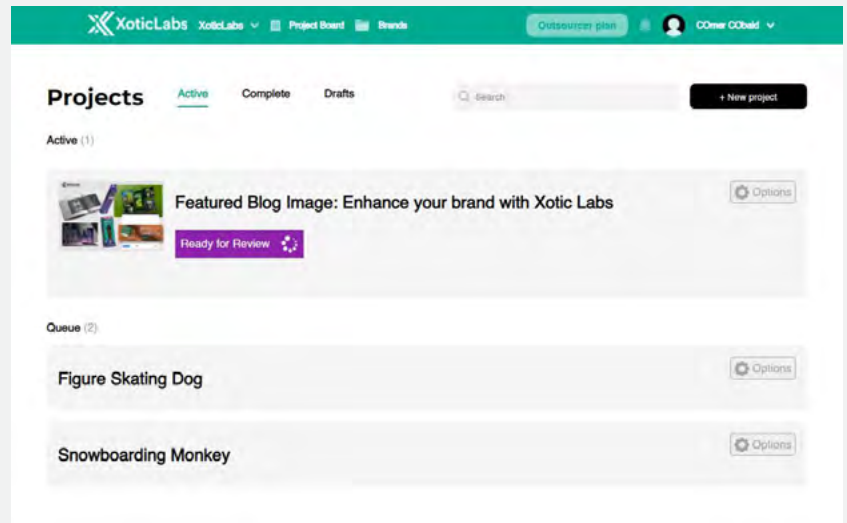


# Download your design files

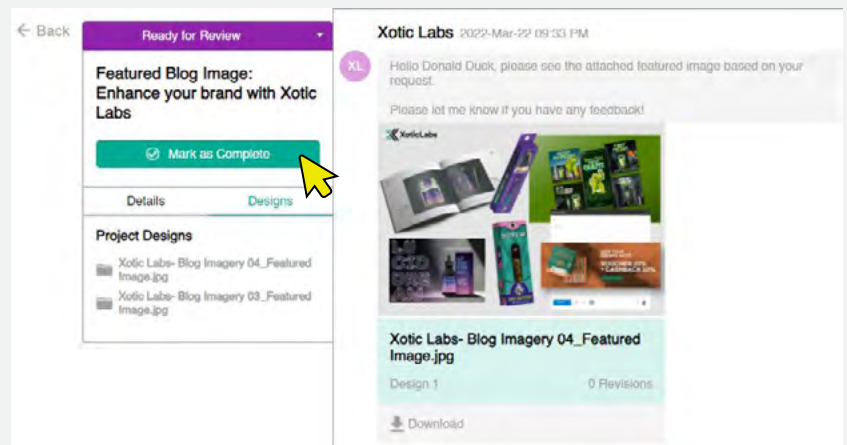
As long as you have an active account, at any point during the design process, you can download any of the submitted design files provided by the designers.

You can also access any of your design files from your completed projects when your account subscription is on Pause.

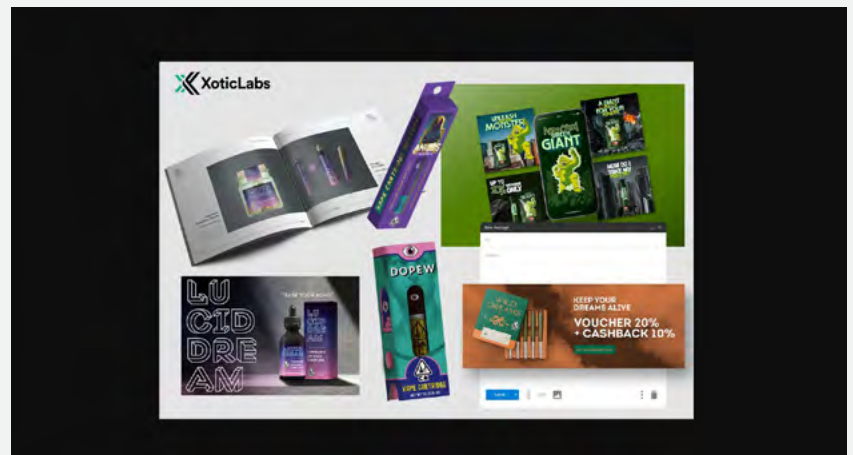
Step 1. Navigate to the project page.



Step 2. Select the 'Designs' tab in the Project Overview sidebar



Step 3. Choose the design file you want to download.



# Update your profile

Your profile can be updated by navigating to the top right corner and clicking your name which will create a drop down of menu options.

Company Profile: Update company details including billing information and subscription type.

My Profile: Update your personal information and preferred file types

# Update your billing information

Navigate to your 'Company Profile' via the drop down menu on your Account Name located in the top right hand corner.

Your Billing Information can be updated by editing any of the chosen fields in this section.

- Update your Credit Card information.
- Add or Update a bank account.
- View your billing history and invoices.

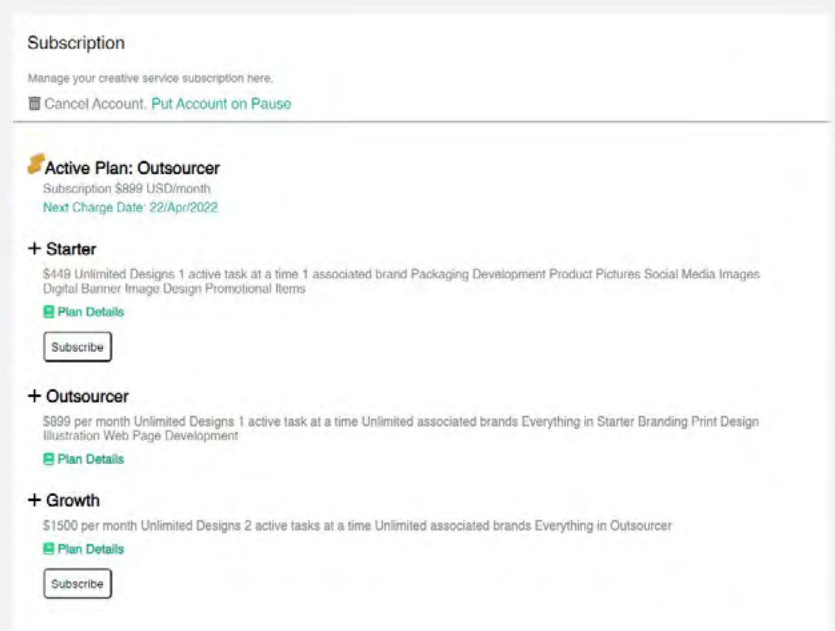
# Update your subscription plan

Navigate to your 'Company Profile' via the drop down menu on your Account Name located in the top right hand corner.

Your Subscription plan can be managed in the right hand window with the subscription details.

Subscription Details window:

- Pause your account
- Cancel your account
- Active subscription details
- Update your subscription plan type



**Subscription**  
Manage your creative service subscription here.  
[Cancel Account](#), [Put Account on Pause](#)

---

**Active Plan: Outsourcer**  
Subscription \$899 USD/month  
Next Charge Date: 22/Apr/2022

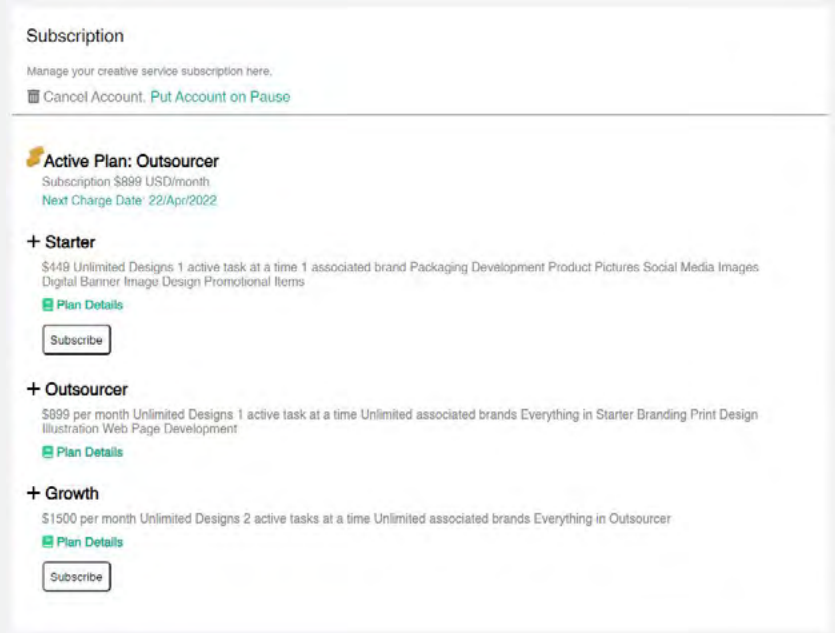
**+ Starter**  
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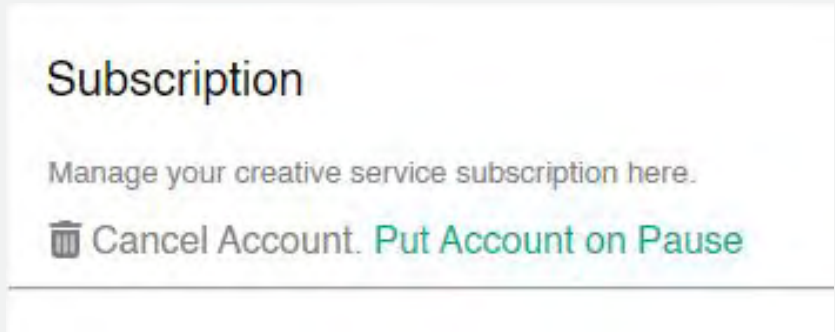
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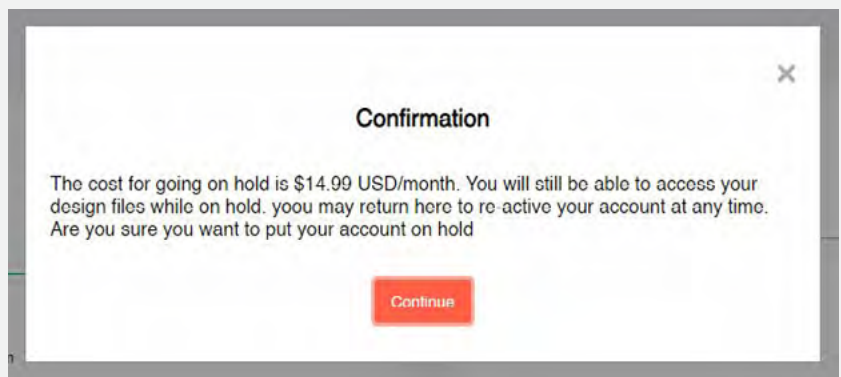
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