

MarketDirect StoreFront® | v13.0

Sales Training – What's New!



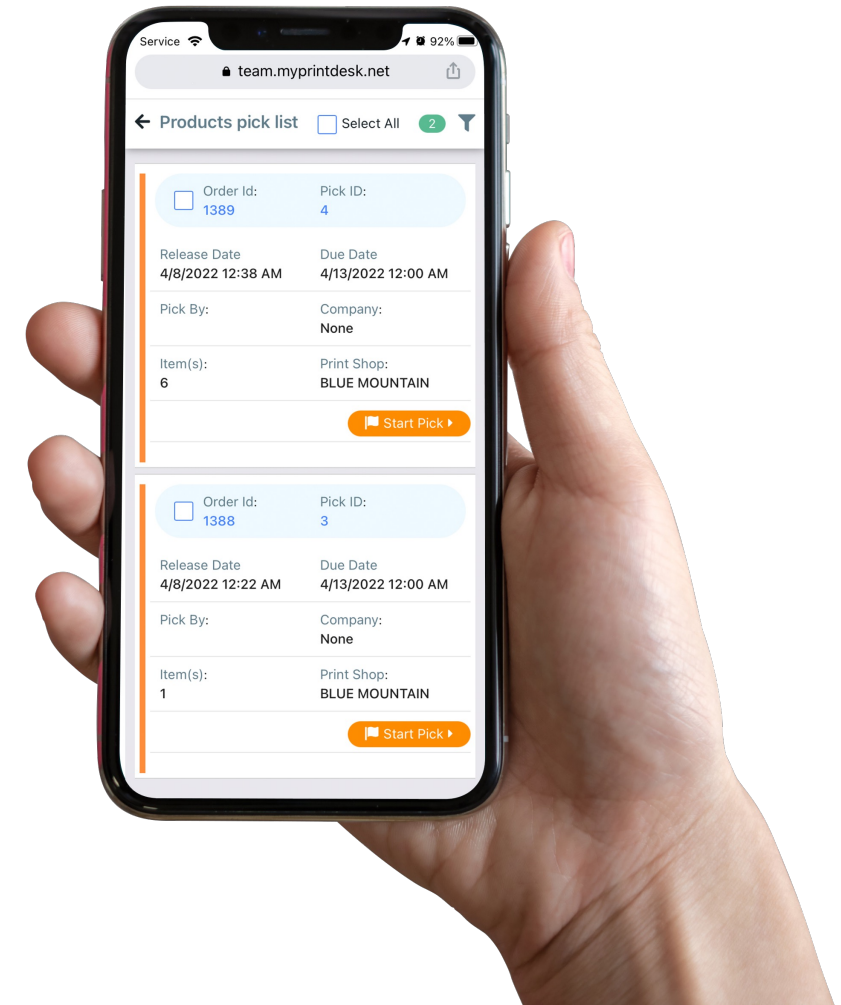
Mobile Fulfillment – NEW!

The Problem.

Mobile devices are ubiquitous on the warehouse floor, but Fulfillment was not mobile-friendly.

The Solution.

Mobile devices can now access “Mobile Fulfillment” from the administration screen.

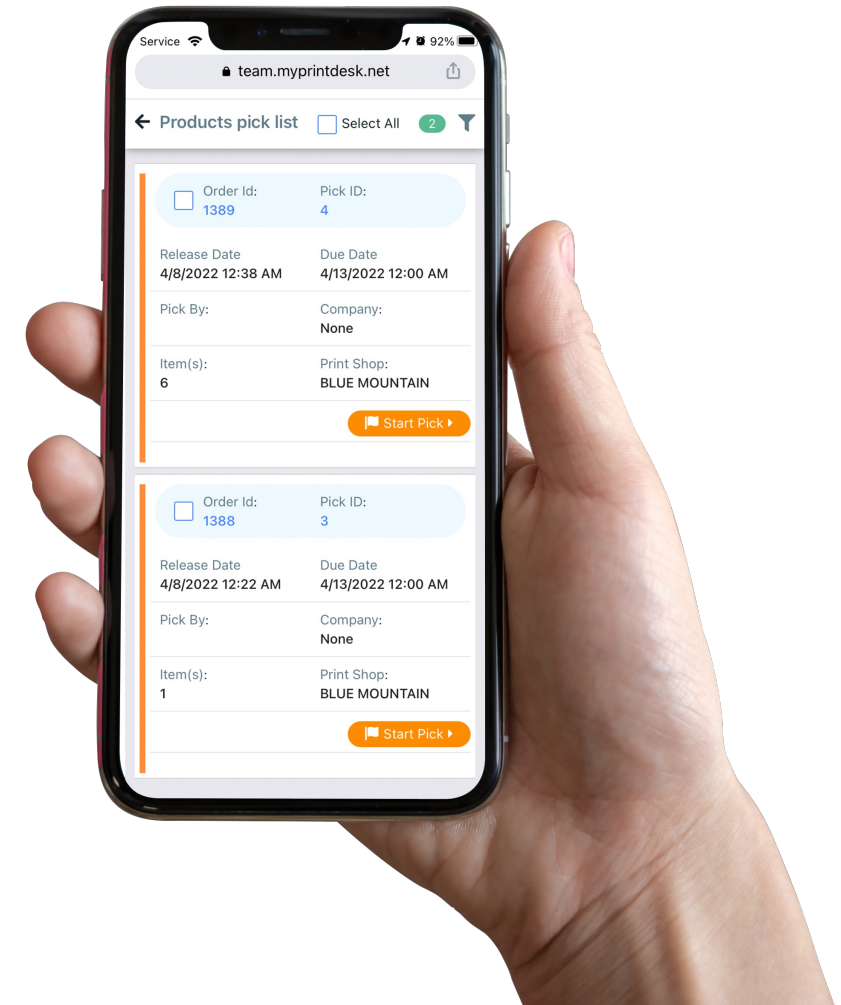


Mobile Fulfillment – NEW!

Mobile Actions

Once authenticated through the browser on the mobile device, you can:

- Create barcodes using Warehouse Location, Skid ID, SKU/Product ID, or Item ID.
- Scan barcodes to ensure the correct item is being picked.
- Complete pick sequences.
- Transfer, adjust, and damage inventory.



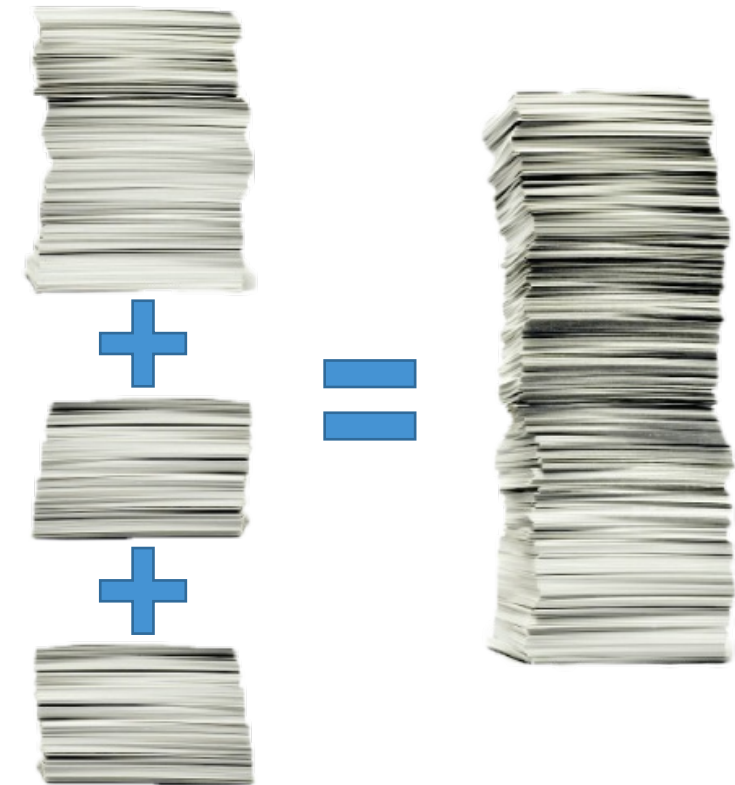
Pricing Groups – New!

The Problem.

Applying volume discounts to several smaller-volume, but similar, products (like multiple business card orders) was not manageable within the software.

The Solution.

Pricing Groups on the Manage Products page allows the administrator to aggregate volumes across products for discounts.



Pricing Groups – New!

Configuring within Administration

1. Create a couple of Products with the same price range and assign them to one group.
 - a. Business Cards: 1-100 = \$0.99/card; 101-500 = \$0.80/card; 501+ = \$0.75/card
2. Select similar Products in the grid.
3. Click “Select Group” button.
4. Add to an existing Group or Add a new Group; set a Group Master.
5. Save the change.

Product Name : BE Ad Hoc Flyer A (Product Price) Product ID : SO-002

Range Unit	Regular Price
1 - 100	0.25
101 - +	0.15

Product Name : BE Ad Hoc Flyer B (Product Price) Product ID : SO-003

Range Unit	Regular Price
1 - 100	0.25
101 - +	0.15



Select Group - 2 Item(s)

Search Group by name

---Unassign Group---

PricingGroupA

##Shared.GroupName

Pricing Groups – New!

The Buyer Experience

1. Buy one Product, specifying a quantity that does **not** move to a discount range.
2. Buy the other Product, specifying a quantity that would move the total pages into a discount range.
3. Observe the updated Cart total.

Products	Quantity	Order Unit	Total
 BE Ad Hoc Flyer A Item Name: BE Ad Hoc Flyer A Product Code: SO-002	75	Each	\$18.75
Save for later Remove			

\$18.75 = 75 x \$0.25 << Non-volume price. 😞

Products	Quantity	Order Unit	Total
 BE Ad Hoc Flyer A Item Name: BE Ad Hoc Flyer A Product Code: SO-002	75	Each	\$11.25
Save for later Remove			
 BE Ad Hoc Flyer B Item Name: BE Ad Hoc Flyer B Product Code: SO-003	75	Each	\$11.25
Save for later Remove			

\$11.25 = 75 x \$0.15 << Volume price. 😊

Pricing Groups – New!

Price Per Unit
is Shown as \$0.25 each,
based on <100 QTY

Products	Quantity	Order Unit	Price
 <u>BE Ad Hoc Flyer A</u> Item Name: BE Ad Hoc Flyer A Product Code: SO-002	75	Each	\$18.75

Based on Pricing Group,
Price Updates to \$0.15 each

Products	Quantity	Order Unit	Price
 <u>BE Ad Hoc Flyer A</u> Item Name: BE Ad Hoc Flyer A Product Code: SO-002 ♥ Save for later 🗑 Remove	75	Each	\$11.25
 <u>BE Ad Hoc Flyer B</u> Item Name: BE Ad Hoc Flyer B Product Code: SO-003 ♥ Save for later 🗑 Remove	75	Each	\$11.25

Customize SmartCanvas Kits – New!

The Problem.

Customizing a kit of SmartCanvas templates (Corporate ID packages) required a tedious, error-prone, one-by-one workflow.

The Solution.

“Customize All” is now available when the kit contains multiple SmartCanvas templates with the same personalization fields. Save time and reduce errors!



Customize SmartCanvas Kits – New!

Implementation.

1. Design your SmartCanvas templates, using consistent data field names.
2. Create the necessary Products.
3. Create the Kit, enabling the “Enable Customize All” option on the “Products in Kit” step.

* “Show Preview mode by default” puts the buyer in Preview mode instead of the SmartCanvas editor. Potentially eliminates clicks depending on the Buyer’s workflow.



Products in Kit

☐ **Products Are Assembled Together**

☒ **Enable Customize All**

Enables buyer to customize all smartcanvas template part of kit. The common variable data would be copied to all smartcanvas job on kit.

☒ **Show Preview mode by default**

Navigate to preview mode by default. Option suitable for kits with common personalization fields

SmartCanvas Kits

Kit_SC

Job Name
Kit_SC

In this kit:

Customize All

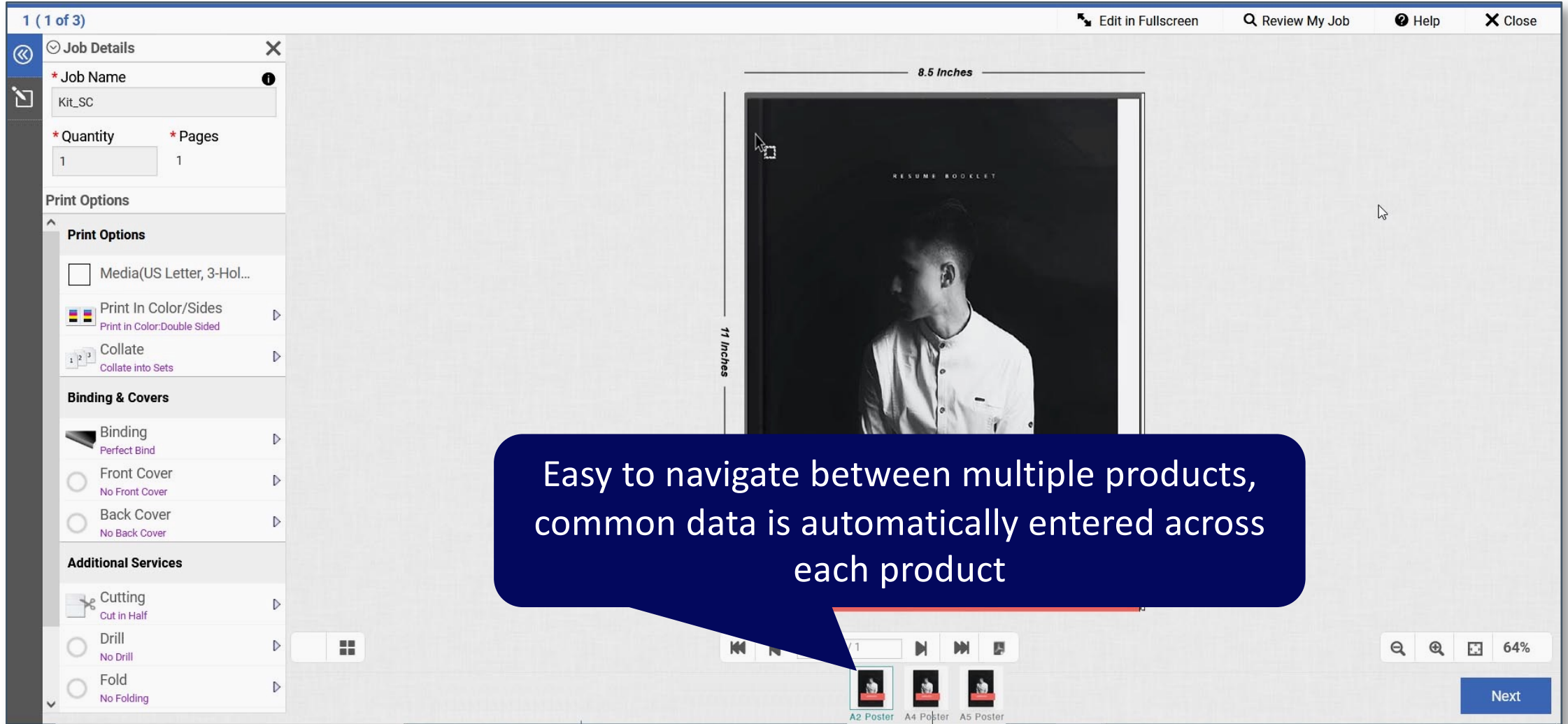
→ Customize		A2 Poster	Item Quantity 1	↺	Customize
→ Customize		A3 Poster	Item Quantity 1	↺	Customize
→ Customize		A4 Poster	Item Quantity 1	↺	Customize

Save Add to Cart



Customize Multiple SmartCanvas
Products from a Single Web-Form

SmartCanvas Kits



The screenshot displays the SmartCanvas Kits software interface. On the left, a sidebar contains a 'Job Details' panel with fields for 'Job Name' (Kit_SC), 'Quantity' (1), and 'Pages' (1). Below this is a 'Print Options' section with expandable categories: 'Print Options' (Media, Print In Color/Sides, Collate), 'Binding & Covers' (Binding, Front Cover, Back Cover), and 'Additional Services' (Cutting, Drill, Fold). The main workspace shows a preview of a 'RESUME BOOKLET' with dimensions of 8.5 inches by 11 inches. A blue callout bubble points to the bottom navigation bar, which includes icons for 'A2 Poster', 'A4 Poster', and 'A5 Poster'. The bottom right corner features a 'Next' button and a zoom level of 64%.

1 (1 of 3)

Edit in Fullscreen Review My Job Help Close

Job Details

* Job Name
Kit_SC

* Quantity * Pages
1 1

Print Options

Print Options

Media(US Letter, 3-Hol...

Print In Color/Sides
Print in Color:Double Sided

Collate
Collate into Sets

Binding & Covers

Binding
Perfect Bind

Front Cover
No Front Cover

Back Cover
No Back Cover

Additional Services

Cutting
Cut in Half

Drill
No Drill

Fold
No Folding

8.5 Inches

11 Inches

RESUME BOOKLET

Easy to navigate between multiple products,
common data is automatically entered across
each product

64%

Next

A2 Poster A4 Poster A5 Poster

Other Updates in MDSF v13



Screenshot-Capable Features



- Add to existing **Spending Account balance**.
- **Manage Galleries** is now part of the new, modern UI!
- Integration with **Avalara Tax**.
- Import products (new or modify) and associate new components.
- New **Spending Account Type** field when importing spending accounts.

“Add To” Spending Account Balance

The Problem.

Importing Spending Account information would only update the account's balance with the value in the file. There was no way to add a value in batch.

The Solution.

The “Add to existing ... balance” option when importing Spending Accounts *adds* the value in the batch file to the account's existing balance.

Spending Accounts

Step 2

Click the Browse button, select your template (see Step 1 above) and

__Spending ...ts_Sample.csv

Type:

Field Delimiter:

☒ Add to existing Spending Account balance ☐

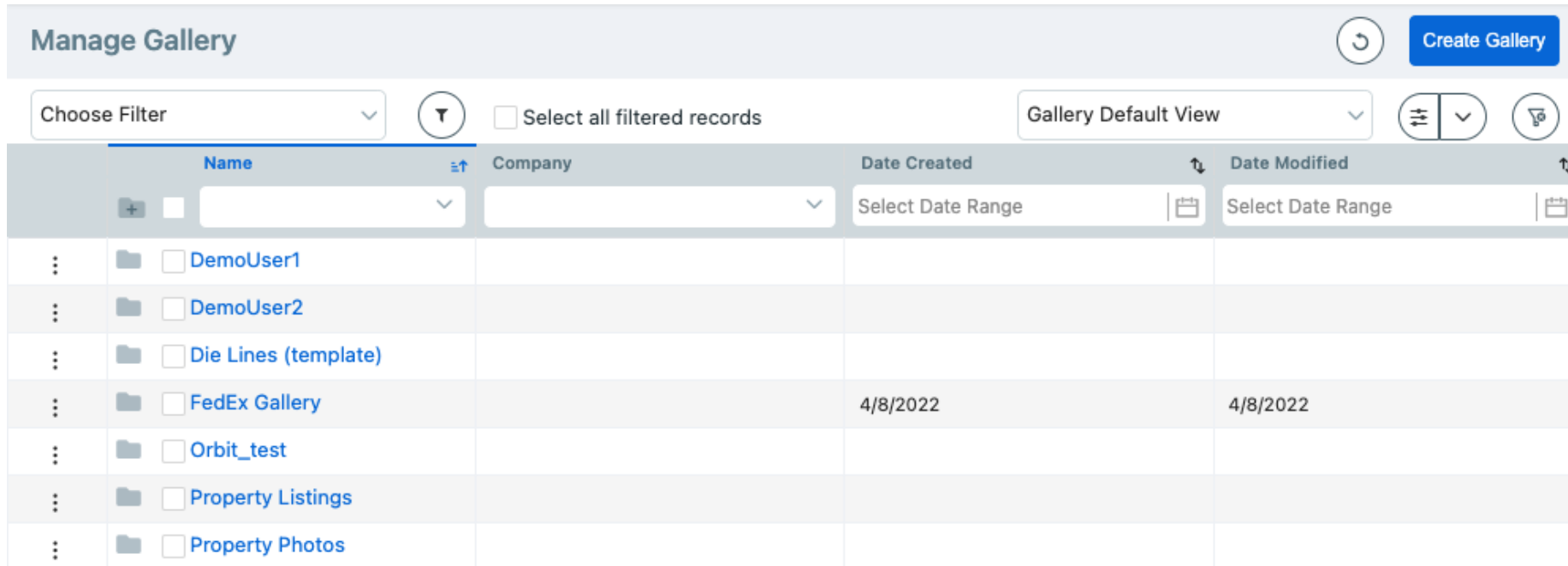
'Manage Galleries' Enhancements

The Problem.

The MarketDirect StoreFront administrator's interface is dated, uses old technology, and can be difficult to navigate.

The Solution.

The main Manage Galleries interface uses the new, modern look with sort, search, and filtering capabilities, and personalized filters and views.



The screenshot displays the 'Manage Gallery' interface. At the top, there's a header bar with the title 'Manage Gallery', a refresh icon, and a 'Create Gallery' button. Below the header, there's a filter section with a 'Choose Filter' dropdown, a funnel icon, a 'Select all filtered records' checkbox, a 'Gallery Default View' dropdown, and icons for list, grid, and search views. The main content area is a table with columns: Name, Company, Date Created, and Date Modified. Each column has a sort icon. The 'Name' column also includes a search icon and a dropdown menu. The table lists several galleries: DemoUser1, DemoUser2, Die Lines (template), FedEx Gallery, Orbit_test, Property Listings, and Property Photos. The 'FedEx Gallery' row shows dates of 4/8/2022 for both Date Created and Date Modified.

	Name	Company	Date Created	Date Modified
⋮	📁 ☐ DemoUser1			
⋮	📁 ☐ DemoUser2			
⋮	📁 ☐ Die Lines (template)			
⋮	📁 ☐ FedEx Gallery		4/8/2022	4/8/2022
⋮	📁 ☐ Orbit_test			
⋮	📁 ☐ Property Listings			
⋮	📁 ☐ Property Photos			

The Opportunity.

Avalara is a world-class sales and use tax cloud-based provider, operating in 95 countries with over \$8.4b (US\$) in remitted tax in 2019. Integration affords organizations using Avalara to immediately take advantage within MarketDirect StoreFront.

The Implementation.

Go to Site Configuration > Taxes and Enable External Tax Integration. “Use Alvara Integration” is available for configuration.

☒ Enable External Tax Integration

☐ Enable VAT based integration

☐ Use TaxConnector
Choose a Tax Service CCH SureTax ▼ Configure Service

☐ Use External PlugIn

☐ Use CCHSureTax Plugin
Note : Please configure the CCH SureTax Account [Click here](#)

☐ Use External Web Service
External Integration URL (Web Service)
External System User Name
External System Password

☒ Use Avalara Integration
Specify Account Details ▼

Account Id

License Key

Item Code (General)

Item Code (Order Discount)

Item Code (Order Fee)

Item Code (Handling)

Item Code (Shipping)

☐ Production ☒ Sandbox

Product Import Improvements

The Problem.

Importing Products in batch is only useful when *not* implementing SmartCanvas templates.

The Solution.

Product import in version 13.0 supports SmartCanvas template name designation to *automatically* align a SmartCanvas template to a product, along with options for Dynamic Preview and Buyer Configuration support.

Additional SmartCanvas fields* in the import file

SmartCanvasTemplateName	DynamicPreview	AllowBuyerConfiguration
	FALSE	TRUE
	FALSE	TRUE
10-up Bus Cards	FALSE	TRUE
No 9 Envelope	FALSE	TRUE
Form Based Calendar	FALSE	TRUE

* New fields recognized by the importer require that pre-v13 import files will require modification prior to their use from this point forward.

Spending Account Type

The Problem.

Batch imports for Spending Accounts did not allow designation for Department or User-level spending, requiring manual intervention.

The Solution.

A new field, “Spending Account Type,” is used by the importer. Allowable values are “UserLevel” or “DepartmentLevel.”

*This change invalidates previous templates for spending account imports, requiring modifications for the new column.



Rebranding

The Problem.

MarketDirect StoreFront and components all list “EFI” as the corporate brand.

The Solution.

Rebranded and relabeled all references from “EFI” to “eProductivity Software”!



THANK YOU



MarketDirect® StoreFront 13.0

