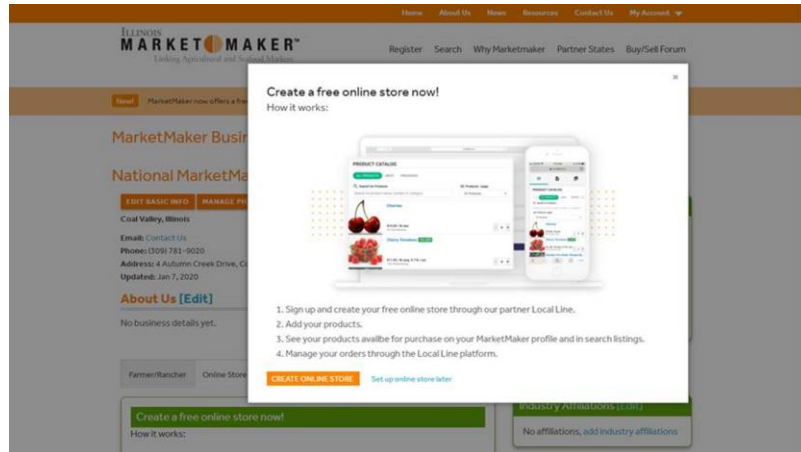


Setting-up Your Store in Your MarketMaker Profile

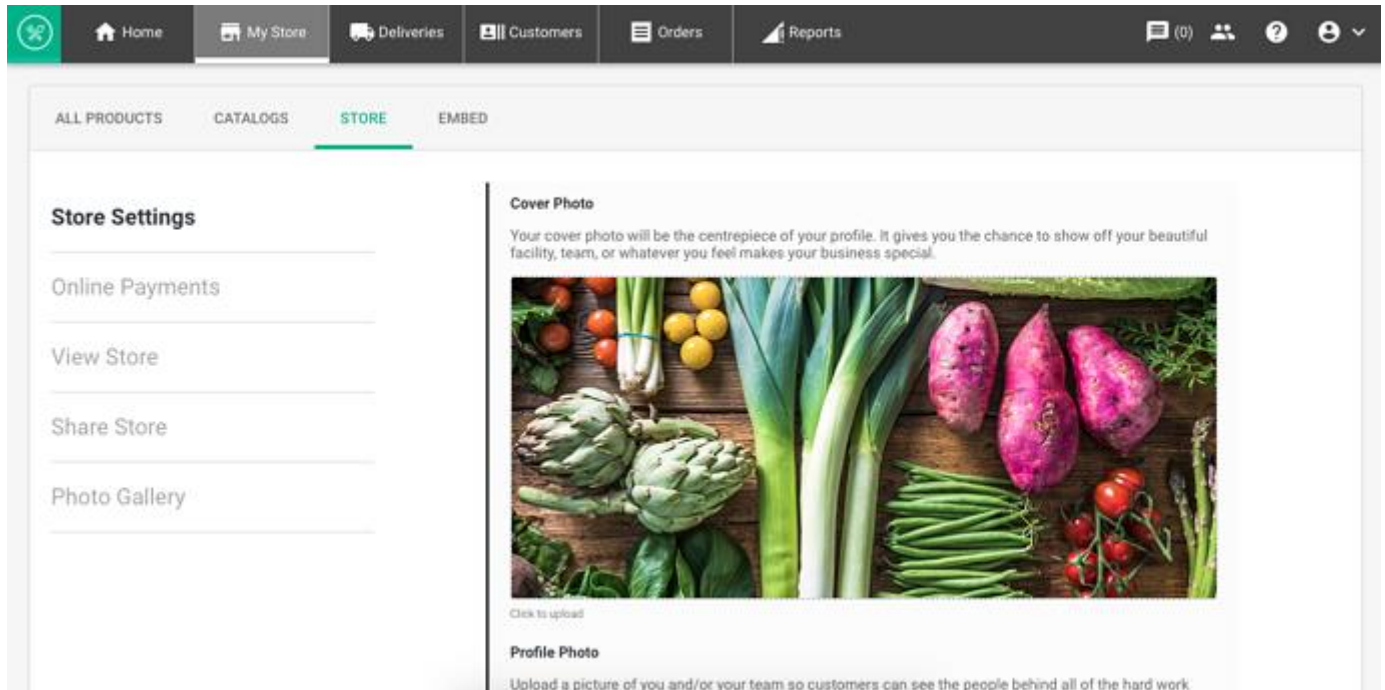


I.	Set Up Your MarketMaker Storefront	2
II.	Add Products	4
III.	Assign Products to a Catalog	9
IV.	Catalog Schedules	15
V.	Online Payment	17
VI.	Add Delivery/ Pickup Locations	19
VII.	Add Customers	23

Source: <https://support.localline.ca/knowledge/1.-set-up-your-storefront-1>

Set Up Your MarketMaker Storefront

Your storefront is your customers introduction to your business & online store, so make it personal!



Click on the **My Store** tab on the navigation pane. Then click the **STORE** tab.

Store Settings

1. Click the camera under the **Cover Photo** heading to upload a picture from your computer, recommended 1280 x 300 px for best results. Simply click the photo again to replace it.
2. Upload **Profile Photo** in the same manner, recommended 200 x 200 px for best results
3. Fill out business information (contact information, shipping and/or billing addresses, etc.)
4. Tell customers about your business (what you do, what makes your business unique, why they should try your products)
5. Check off any **Certifications** make your business unique

6. Ensure to click '**Save Changes**' button when finished

Online Payments (Optional)

1. Set your **Currency**, Canadian or US Dollar
2. Select your online **Payment Getaway**, Local Line is integrated with both Stripe and Square
3. You will be redirected to another webpage to log into your Stripe or Square account to make connection

View Store

- This will show you what your online store looks like to visiting customers
- You will see it open your online store in a new tab. You can simply close it when done reviewing

Share Store

- Here you will find your unique online store url, you can share this with customers to find your online store.

Photo Gallery

1. Click on the camera icon, select photo, click "**Open**," click the checkmark (top right of photo to save selection)
2. To remove a photo, click the '**x**' to the right of the photo
3. Photo ideas: your team, property/facility, products

Tips:

- Fill out as much information as possible so your customers can learn about your business and what you offer. Ensure to 'Save' where applicable.
- Click 'View Store' frequently to see what your store looks like from a customer perspective and to check your work!

Add Products

Add Products, Set Inventory and Availability.

To start, click the **My Store** tab on the navigation pane. Then click the **ALL PRODUCTS** tab.

Note: There are two ways in which products can be uploaded to your account, both individually and in bulk. Please follow the directions below for the process that suits you best.


Option One: Add Products Individually

1. Click the **All Products** Tab
2. Click the '**Add A Product**' button, circle with plus sign icon

Edit Product ×

General

Product Photo
It's picture day! Get the right lighting and show off your products


Click to upload - square images work the best!
*We might crop your image for you after you save

Product Information

(optional)
e.g. 214, P18DF

Name
Cherry Tomatoes

Price
The price and units of your product.
e.g. \$10 per 5lb

\$5.00

 per

1

pint

 ▼

Taxable
Whether or not the product is taxable.

☐ Taxable

Category
What type of product is this? Help your users find what they're looking for more easily by adding a category.

Vegetables

×

General

1. Upload a product picture (smaller than 20 MB) by clicking the *camera icon* and selecting a photo from your computer or mobile device
2. Once you've selected the image, click **Open** to save
3. You can also take a picture from your mobile phone by clicking on the photo icon
4. Assign product # (Optional)
5. Enter the **Name** of product
6. Add **Price** per unit amount
7. Select the box beside **Taxable** if product is taxable
8. Select a **Category** to assign the product to (this can be done at a later time when you have created categories)
9. Add a description of your product (the more information customers have, the better!)
10. Assign the product to a catalog

Inventory

*Local Line offers both **Basic Inventory** and **Advanced Inventory**. The steps below outline Basic Inventory, [click here](#) to learn more about Advanced Inventory.*

1. Enter your available product inventory in **Inventory Count**
2. We'll send you a notification when your inventory gets low so you can re-stock. Just enter the number in the **Notify me when I get low** field.

Note: If you do not wish to **Track Inventory**, deselect this field by clicking to green check mark. Once a product is set up to track inventory it cannot be reversed.

Add New Product
×

>
General

▼
Inventory

Inventory Count
Set the amount of units you have available for this product. We track sales automatically! Uncheck **Track Inventory** for unlimited. Once you start tracking your inventory, you cannot stop tracking your inventory.

☒ Track Inventory

Notify me when I get low
If you set a value here, we'll send you an email whenever your inventory count for this product drops below it.

>
Availability

PREVIEW

CREATE

Availability

Enable Seasonality

If your product only available for specific seasons or time frames (*example*, Ontario asparagus season runs from May to June), you can enter it with the calendar picker. If it's not presently May or June, customers will not be able to order it.

Visibility

You can choose to manually remove products from your available products by switching the toggle to "Off." It will remain in the catalogs you've added it to, but will not be visible to customers or available for purchase.

If turned off, this item will be visible to you and grey in color.

Note: deleting a product will cause it to be removed from all previous order invoices, instead simply turn off the visibility of the product to remove it from your storefront and from your customer's view.

Edit Product

General

> Inventory

▼ Availability

Enable Seasonality

By default your product will be available year round. If it is subject to seasonality, turn on this feature and select the start and end dates for the season.

ON

Start Date

2018/05/28

End Date

2018/07/01

Visibility

You can choose to manually remove this product from your available products. If you do so, it will remain in all of the catalogs you've added it to, but will not be available for purchase.

ON

PREVIEW

SAVE

Option Two: Add Products in Bulk

Add Products via Downloadable Template

1. Click the **All Products** Tab
2. Click '**Download/Upload Products**' button, opposite arrows icon
3. Download 'Product Template' and open on your desktop in Excel
4. Fill in Product Template with product information
5. Save the template to your desktop
6. Back in Local Line, click the '**Choose File**' button
7. Select completed template file from desktop
8. Click the '**Open**' button
9. Click the '**Upload**' button to bulk add products in one upload.

Note: Any upload issues will be explained in a window, in this case you would make changes to template file from desktop, save and re-upload.

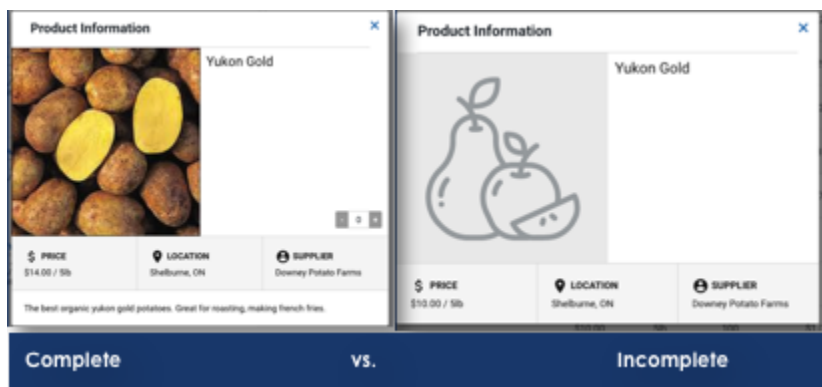
Upload Product Photos

1. Click the **Edit** button beside the product
2. Click the *picture icon* and select the photo from your computer or mobile device
3. Click the **'Open'** button
4. You can also take a picture from your mobile phone by clicking the camera icon

Not interested in adding product photos?

1. Click **Edit Account**, top right corner of screen
2. Switch the **Product Pictures** toggle to Off

Note: Adding a picture and description may seem irrelevant but it's proven that pictures and descriptions influence decisions when purchasing online.



Assign Products to a Catalog

Catalogs enable you to organize products and privately set product prices, pack sizes and availability to the unique needs of your customers.

Once you have [added your products](#), you must assign products to a catalog to have them display on your storefront.

Assign Products to a Catalog

Click the **My Store** tab on the navigation pane. Then click the **CATALOGS** tab.

1. Click the '**Edit Catalog**' button to the right of the catalog you wish to add products to
2. Click the **VIEW ALL PRODUCTS** tab, found under the search field
3. Type the product name you wish to add in the **Search for Products** search field
4. Click the green checkmark to the right of the product name
5. Adjust the price as desired
6. Click **Save**

Firstthis...

EDIT CATALOG ×

Catalog Name
Make a name for this catalog that you can refer back to

Example Catalog

🔍 Search for Products **1**

Cherry Tomatoes

VIEW ALL PRODUCTS (29)

VIEW SELECTED PRODUCTS (0)

<input type="checkbox"/>	PRODUCT	BASE PRICE	ADJUSTMENT	ADJUSTED
<input type="checkbox"/>	21776 - Cherry Tomatoes	\$ 9.10		\$ 9.10

SAVE

... *this this*

EDIT CATALOG×

Catalog Name
Make a name for this catalog that you can refer back to

Example Catalog

🔍 Search for Products

VIEW ALL PRODUCTS (29)

VIEW SELECTED PRODUCTS (1)

<div><input type="checkbox"/></div> PRODUCT	BASE PRICE	ADJUSTMENT	ADJUSTED
<div><input checked="" type="checkbox"/></div> 21776 - Cherry Tomatoes	\$ 9.10	<div><div>\$</div><div>%</div><div>FIXED</div><div>+2</div></div>	\$ 11.10

4 **SAVE**

Note: Catalogs are priced individually. Pricing information can be found on our [pricing page](#). Please contact support@localline.ca or your sales rep to add additional catalogs to your account.

Categories help you and your customers find products more easily and efficiently!

Click on **My Store** tab on the navigation pane. Then click the **ALL PRODUCTS** tab.

Create a New Category

NOTE: *Categories appear in the order in which you added them. Newest categories are on the right. It's best to know all the categories and the order in which you'd like them to appear before you start entering them.*

1. Click '**Add Category**' button
2. Enter the category name in the pop-up window and click the '**Save**' button
3. It will appear in the *category bar* above your product list. You can edit the category name by clicking on the pencil icon next to the category name

Assign a Product to a Category

Option One: Bulk Assign Products

1. Click the products you want to assign, check the box to the left of the product
2. Click '**Assign to Category**' button
3. Select the category from the drop-down menu in the pop-up window & click the '**Assign**' button

Note: Make sure to deselect products once assigned to a category, so their location is not overwritten when you add your next category.

**First
this...**

ALL PRODUCTS CATALOGS STORE EMBED

ADD PRODUCT DOWNLOAD / UPLOAD PRODUCTS ADD CATEGORY **ASSIGN TO CATEGORY** DELETE SELECTED

Search by product number or name

ALL PRODUCTS MEAT VEGETABLES

<input type="checkbox"/>	Filtered	NAME	CATEGORY	REMAINING	UNIT	4 / 18
<input type="checkbox"/>		Bulk Beef	Chicken	- 135.72 +	lb	EDIT
<input checked="" type="checkbox"/>		Butternut Squash	-	- 94 +	ea	EDIT
<input checked="" type="checkbox"/>		Cherries	-	- 94 +	lb	EDIT
<input type="checkbox"/>		Chicken Breasts	-	- 70 +	ea	EDIT

... then that!

Assign 4 products to a Category

Category

Vegetables

Meat

Option Two: Individually Assign Product


You can assign or reassign a products to an existing category while you are editing or creating a new product.

1. Click **Edit** next to the product you want to assign (*or when you are building a new product*)
2. Click the 'x' in the category field, if already assigned to a category

3. Type in category you wish to assign product to and select it from the dropdown menu
4. Click the **'Save'** button

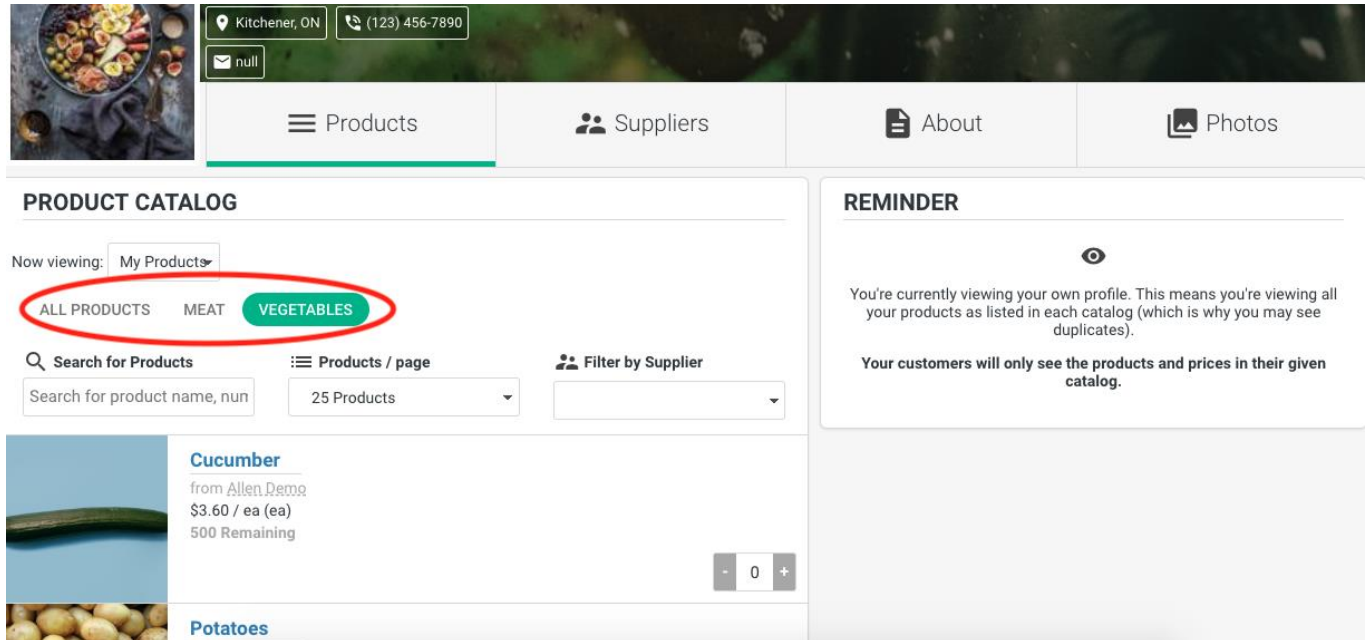
Edit Product



Product Photo It's picture day! Get the right lighting and show off your products	 <small>Click to upload - square images work the best! *We might crop your image for you after you save</small>				
Product Information	<table><tr><td># (optional)</td><td>Name</td></tr><tr><td><input type="text" value="e.g. 214, P18DF"/></td><td><input type="text" value="Cherry Tomatoes"/></td></tr></table>	# (optional)	Name	<input type="text" value="e.g. 214, P18DF"/>	<input type="text" value="Cherry Tomatoes"/>
# (optional)	Name				
<input type="text" value="e.g. 214, P18DF"/>	<input type="text" value="Cherry Tomatoes"/>				
Taxable Whether or not the product is taxable.	<input type="checkbox"/> Taxable				
Category What type of product is this? Help your users find what they're looking for more easily by adding a category.	<div><input type="text" value="Select a category"/> Vegetables Meat</div>				

Navigating Categories From Customer View

Customers can navigate between categories by clicking the following buttons on the online storefront to bring up the list of products assigned to each.



Catalog Schedules

Save time and remind customers to place orders by creating automated catalog schedules. No more emailing 100's of customers individually!

Create a Catalog Schedule

*Click on the **My Store** tab on the navigation pane. Then click the **CATALOGS** tab.*

1. Click the '**Edit Customers**' button to the right of the catalog you wish to create a schedule for
2. Turn the toggle to "ON" beside **Catalog Schedule**
3. Select your frequency, weekly or monthly and the days you want your catalog to go to customers
4. Select the time of day, remember to select AM or PM
5. Enter a message, if you wish
6. Click the '**Save**' button

MANAGE CUSTOMERS FOR Wholesale
×

\$ Days until payment is due:

-
30
+

☒ Make catalog available to the public:

OFF

▼
➤

Catalog Schedule:

ON

Your catalog will be sent out every Tuesday at 8:45AM.

Select Frequency

Weekly

Select Days

Mon

Tues☒

Wed

Thu

Fri

Sat

Sun

Time

8:45
AM

Message (optional)

This is your weekly catalog! Check it out to see new products and updates on pricing.

All Customers (1)

Filter 'All Customers'

☐ Chef's Block
Toronto, ON, Canada

Selected Customers (2)

Filter selected customers

☒ Gracie's Groceries
Orillia, ON, Canada

☒ Penny's Market
Guelph, ON, Canada

SAVE

Make The Most of Your Catalog Schedule

Timing: Think about when your customers are most likely to check their email and send your catalog then, set that as the time of day your catalogs will be sent out

Personal Message: Take advantage of that message field, try adding in a story from the farm that week or a new recipe you have been loving featuring your products. These are great ways to engage your customers, just remember to click on and change that message before the next catalog is set to be sent out, so your customers don't receive the same message twice!

Note: You will see a toggle for "Make your catalog available to the public." This allows customers to view the pricing when they are on your online store, either on your website (if you embed your online store to your website) or, they simply find your store online. Typically Public catalogs are retail catalogs.

Online Payment

Set up and accept online payment with Stripe or Square.

Once you have received and shipped an order, send an invoice to the customer either through your Local Line account or using an alternative accounting you have in place.

Setting Up Online Payments (Optional)

Click the **My Store** tab on the navigation pane. Then click the **STORE** tab and select **Online Payments** from menu on left.

1. Set your **Currency**, Canadian or US Dollar (please allow approximately 15 seconds for the selected currency to populate the field).
2. Select your online **Payment Getaway**, Local Line is integrated with both Stripe and Square
3. You will be redirected to another webpage to log into your Stripe or Square account

The screenshot shows the 'My Store' interface with the 'STOREFRONT' tab selected. On the left, there are links for 'Cover Photo', 'About', 'Online Payments', 'Certifications', and 'Photo Gallery'. The 'Online Payments' section is active, displaying a form to connect a payment gateway. The form includes a 'Currency' dropdown menu set to 'Canadian Dollar' and two 'Payment Gateway' options: 'Square' and 'stripe', each with a 'Connect' button.

Once Online Payment is set up, a **Pay Now** button will appear on invoices you send out. If online payment is not set up, customers will not see the button.

Instruct Customers to Pay Online

Within a customers account, follow the steps below to pay for an order online

1. Click the **Orders** tab
2. Open the order
3. Click **Pay Now**

NOTE: If you utilize another accounting system and are using Local Line for inventory or customer management only, please ensure to mirror any order changes you've applied through your own system, i.e. Sage, QuickBooks etc. to your Local Line account. Don't forget to [Mark Orders Paid](#) to keep yourself organize!

Add Delivery and Pickup Locations

You dictate how, where and when your customers receive their orders. Use delivery plans and pick up locations to best service your customers.

Delivery plans

Delivery plans dictate which customers will be offered delivery. A customer with a set city matching one of your delivery locations will automatically be offered delivery. A customer with a non-matching city will not be offered delivery. Pickup locations are always offered to customers no matter their city.

Add a Delivery Plan

1. Click the **Deliveries** tab on the navigation bar.
2. Click **Delivery Plans**.
3. Click **Add Plan** button.
4. Complete the form fields and note the following:
 - **Delivery area** - If you want to add a more specific delivery area than this field allows, such as townships and particular zipcodes, you can indicate that by adding a tag to the order to represent it. To add a tag to an order, go to the Orders tab and click View next to the order. In the Tags section, type the tag text and then press "Enter" on your keyboard. You can filter your orders by tags from the Orders tab.
 - **Order Lead Time** - This is the amount of time you need to prepare the order from when it was received, to when it is delivered. The clock for lead time is based off 11:59 PM on the day of delivery.

Example: The order time for the Toronto delivery plan below is 48 hours, and they deliver Monday to Friday. If the customer orders Monday they will not be able to select Tuesday as their delivery day. Wednesday is the first day they can expect the delivery because of the 48-hour lead time

Edit Delivery Plan for Toronto, ON, Canada



Delivery Area Ex: Toronto, ON. You can enter cities, provinces or countries.	<input type="text" value="Toronto, ON, Canada"/>
Minimum Purchase Any orders from this area must be above the given value. Ex: \$300.	<input type="text" value="\$200.00"/>
Delivery Fee This fee should cover your expenses for getting the product to your customer.	<input type="text" value="\$20.00"/>
Minimum for Free Delivery If you enable this feature and the total value of an order from this area exceeds the given value, then the customer will not be charged a delivery fee at checkout.	<div><input checked="" type="checkbox"/> ON</div> <div><input type="text" value="\$400.00"/></div>
Order Lead Time (hours) The amount of time you need to process an order from this area.	<div>- <input type="text" value="48"/> +</div>
Availability Select the days that you delivery to this area.	<div><div><input checked="" type="radio"/> WEEKLY <input type="radio"/> MONTHLY</div><div><div><input type="checkbox"/> Sunday</div><div><input checked="" type="checkbox"/> Monday</div><div><input checked="" type="checkbox"/> Tuesday</div><div><input checked="" type="checkbox"/> Wednesday</div><div><input checked="" type="checkbox"/> Thursday</div><div><input checked="" type="checkbox"/> Friday</div><div><input type="checkbox"/> Saturday</div></div></div>

<p>Automated Checkout Message</p> <p>Display an automated message about the date of the transaction after your customers place an order.</p>	<div data-bbox="721 241 816 285">ON</div>
<p>Custom Checkout Message</p> <p>After a customer orders from your store, they'll receive this custom message.</p>	<div data-bbox="724 447 1370 592"> <p>Thank you for ordering from Penny's Market! We will message you 3 hours before your delivery.</p> </div>
<div data-bbox="1166 657 1403 714"> DELETE SAVE </div>	

Availability

Weekly:

- Select the weekdays you deliver to the given city

Monthly

- Select the days of the month you deliver to the given city (i.e. every other Friday, the first Monday of each month)

Custom Checkout Message


After customers place their order, the Custom Checkout Message will appear with the automated confirmation that the order was placed successfully and the date of delivery.

This is a good place to include any of the following information:

- Delivery fees may vary depending on weight of order
- If you will send them tracking information on shipped items
- Will you message in Local Line for updates
- Your contact information
- Any other items they should know about your delivery process

[Back to Supplier List](#)

1. PENNY'S MARKET



THANK YOU FOR YOUR ORDER!

Penny's Market will be delivering to you on June 2, 2018.

Thank you for ordering from Penny's Market! We will message you 3 hours before your delivery.

Remaining Total: \$0.00

3. Click **Save**.

Note: To **edit** a delivery plan, click the **Edit** button to the right of the plan. Click the **x** to **delete** a delivery plan.

Pickup Locations

Adding pickup locations allows purchasers to order your products even if they aren't in one of your delivery zones. Once an order is placed, you'll be given the name of the location associated with that order and you can drop off the goods for the purchaser(s).

Add a Pickup Location

1. Click the **Deliveries** tab on the navigation bar.
2. Click **Pickup Locations**.
3. Click **Add Location**.
4. Complete the form fields.

Add a New Pickup Location
✕

	<div style="display: flex; justify-content: space-between;"> <div>City</div> <div>Postal Code</div> </div> <div style="display: flex; justify-content: space-between;"> <input style="width: 45%;" type="text"/> <input style="width: 45%;" type="text"/> </div>
Order Lead Time (hours) <small>The amount of time you need to process an order to this location.</small>	<div style="display: flex; align-items: center;"> - <input style="flex-grow: 1; text-align: center;" type="text" value="0"/> + </div>
Availability <small>Select the days that this location is open for purchasers to pick up their order.</small>	<div style="margin-top: 10px;"> <input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday </div>

CREATE

Add Customers

Whether you need to add one customer or dozens, it's easy!

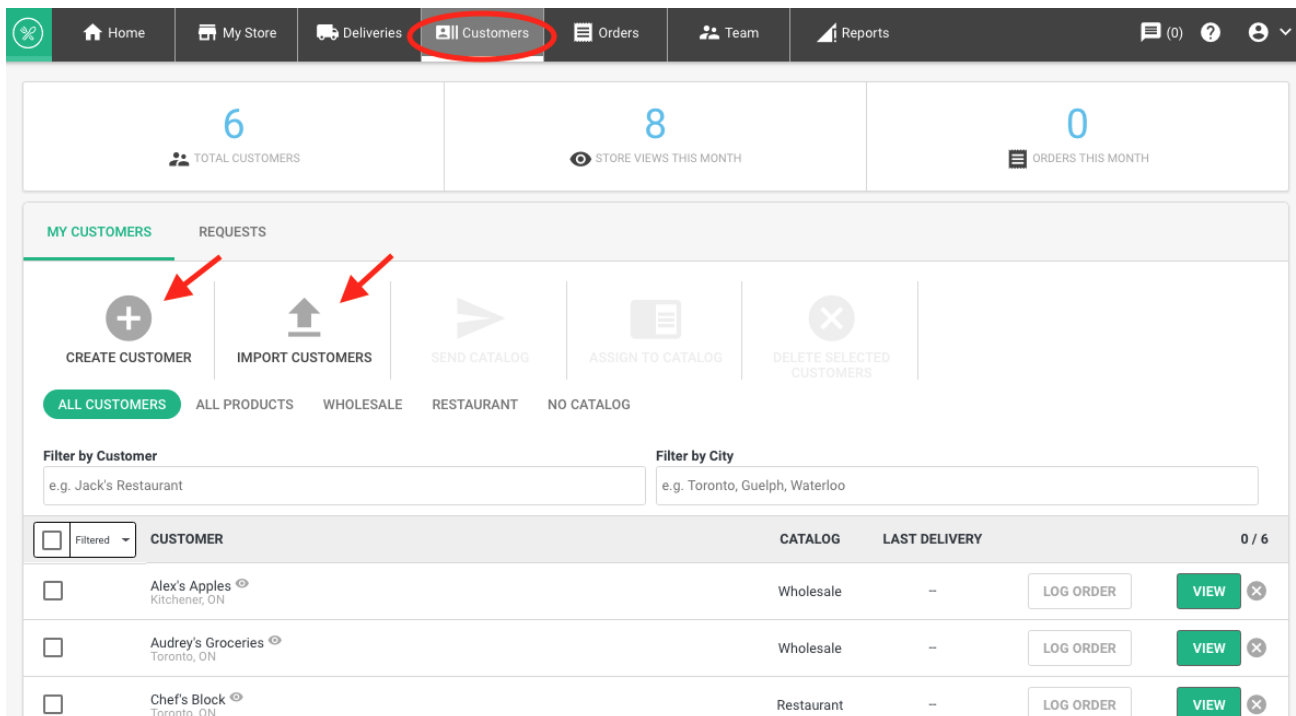
You need these customer details to add them to Local Line:

1. Account Name (this can be a business name "Jack's Pub" or a consumer name "John Smith")
2. Email Address (case-sensitive)
3. Phone Number (Use a placeholder if you do not have a number.)
4. City

Your customers can add more of their information when they register their account. Customers that have not yet registered their account display an **Unregistered** tag beside their name.

There are Two Ways to Add Customers

1. [Bulk-import](#) customers - great for when you first sign up.
2. [Individually](#) add customers.



The screenshot shows the Local Line dashboard with the 'Customers' tab selected. The dashboard includes a navigation bar at the top with icons for Home, My Store, Deliveries, Customers, Orders, Team, and Reports. Below the navigation bar, there are three summary cards: 'TOTAL CUSTOMERS' (6), 'STORE VIEWS THIS MONTH' (8), and 'ORDERS THIS MONTH' (0). The main content area is divided into 'MY CUSTOMERS' and 'REQUESTS' sections. The 'MY CUSTOMERS' section has a 'CREATE CUSTOMER' button (indicated by a red arrow) and an 'IMPORT CUSTOMERS' button (indicated by a red arrow). Below these buttons are filters for 'ALL CUSTOMERS', 'ALL PRODUCTS', 'WHOLESALE', 'RESTAURANT', and 'NO CATALOG'. There are also search filters for 'Filter by Customer' and 'Filter by City'. The 'REQUESTS' section has buttons for 'SEND CATALOG', 'ASSIGN TO CATALOG', and 'DELETE SELECTED CUSTOMERS'. At the bottom, there is a table of customers with columns for 'CUSTOMER', 'CATALOG', 'LAST DELIVERY', and actions like 'LOG ORDER' and 'VIEW'.

CUSTOMER	CATALOG	LAST DELIVERY	ACTIONS
<input type="checkbox"/> Alex's Apples [Ⓢ] Kitchener, ON	Wholesale	--	LOG ORDER VIEW [ⓧ]
<input type="checkbox"/> Audrey's Groceries [Ⓢ] Toronto, ON	Wholesale	--	LOG ORDER VIEW [ⓧ]
<input type="checkbox"/> Chef's Block [Ⓢ] Toronto, ON	Restaurant	--	LOG ORDER VIEW [ⓧ]

Bulk Import Customers

1. From the **Customers** tab, click **Upload Customers** and then click **Customers Template** to download the template.
2. Complete the template.
3. Save the template file to your desktop.
4. Click the **Choose File** button to upload the template file.
5. Click the **Upload**.

Individually Add Customers

1. From the **Customers** tab, click **Add A Customer**.
2. Complete the form.
3. Click **Create**.