InContext

ShopperMX Training

Kellogg's

User Training Guide

Your InContext Team

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Executive Sponsor	Day-to-Day Contact	Success Manager	Support

Primary Contacts

InContext's Virtual Principles

Ideate

Create and visualize category management shelf principles, brands, marketing material in a hyper-realistic virtual environment

Evaluate

Test new ideas virtually before executing in market for go-to-market confidence and sell-in

Activate

Get to "yes" faster with virtual presentation material and collaboration with retailers

Virtual Store Testing to Assess Retail Changes

Insights powered by ShopperMX

Insights powered by ShopperMX deliver the most accurate data and analysis for your top business challenges. From quick merchandising to complex SKU rationalizations, ShopperMX insights are tailored for you – with as much or little consulting and recommendations as you need.

SHELF	**PACKAGING**	**SIGNAGE**	**DISPLAY**
Which arrangement or assortment delivers the optimal performance?	Which package is noticed, liked, & results in shopper purchase?	Which signage is noticed, understood, & drives sales?	Which display is noticed, understood, & drives sales?

| **NEW PRODUCT**	**SWITCH OR WALK**	**PRICE**	**PROMOTION**
Where do shoppers expect to find your new product?	Which product is most substitutable & when will shoppers walk with no purchase?	What is the impact of pricing on shoppers' perception of value?	Which promoted price or multiples offer drives category performance?

Why ShopperMX?

Optimization

Optimize POG arrangements and category adjacencies in store

Merchandising

Cross-Category merchandising to create an occasion one-stop-shop

Engagement

Use signs, displays, and merchandising to engage shoppers

Activation

Create internal selling tools and activate your ideas at retail

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ShopperMX Utilization Cycle

- Signage and display creation
- Store Layout
- Planogram tooling
- New Packaging Launch
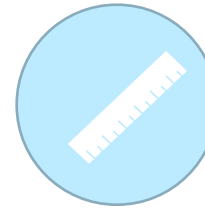
- Test shopper behavior
- ROI impact on product and category sales
- Visual data analysis

- Live store walkthrough
- Screenshots
- Videos
- Sales presentation tools

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Virtual Planning Process – Where do you start?

01
Identify Objectives

What is your desired outcome?

How do you define success?

What is your timeline?

02
Project Planning

What are your environment needs?

Who is the point of contact?

What content needs to be made?

03
Content Creation

Create Displays, Products, Signs and More

Modify real retail environments

Build quickly and effectively

04
Presentation

Publish virtual simulations

Incorporate recommendations

Showcase recommendations

05
Activation & Collaboration

Images and Videos

'Live' store visits

Compliance and execution

Project Planning Best Practices

Identify the Business Need

- What problem are you solving? Why?
- Can you use SMX? If so, how?

Plan your Project

- What is your timeline?
- What content will you need (.psa files, product images, signage)
- What resources do you have?

Create Content

- Create a project
- Upload content
- Record video, screenshots, VAA

Plan your Project

- How will you present the new concept? (store walk through, video, screenshots, PP, VAA)
- Who will present the new concept?

Training Overview

Lesson One

Homepage and navigation

- Logging in
- Home screen navigation
- Create a new project
- Project assets
- Media collection
- Manage Project Access

Lesson Two

Planograms and Products

- Import Planogram
- Copy Planogram
- Edit Planogram
- Highlighting capability
- Master Library
- Importing product images

Lesson Three

Signage and Displays

- Create sign
- Create display
- Adding product onto display
- Editing product arrangement & assortment on display

Lesson Four

Stores

- Copying or Create a store
- Micro Space - Drop in POGs, signs, displays

Presentation Tools

- Drop in POGs, signs, displays
- Screenshots
- VAA report
- Create a video

Conventions Legend

Note: 📓
A Note presents interesting pieces of information surrounding the topic

Tip: ❗
A Tip offers advice or an easier way of doing something

Caution: ⚠️
A Caution advises about potential problems that might arise

Lesson One

Getting Set Up, Homepage, Navigation

How to Log Into your ShopperMX Account – Part 1

Step 1 - New ShopperMX users receive a **Welcome to ShopperMX** e-mail. Click on the **Activate Account** link to get started. If you did not receive an e-mail please contact support@shoppermx.com

Step 2 - Fill out the **Account Information** page. Set your password. Your username is your e-mail.

Step 3 - Click on the **Yes, I agree to the ShopperMX Acceptable Use Policy** and then click **Save and Open ShopperMX.**

Step 4 - Go to Shoppermx.com and log into your account.

How to Navigate the Home Screen – Part 1

ShopperMX™
Powered by: InContext

Home
Projects
Library
Support
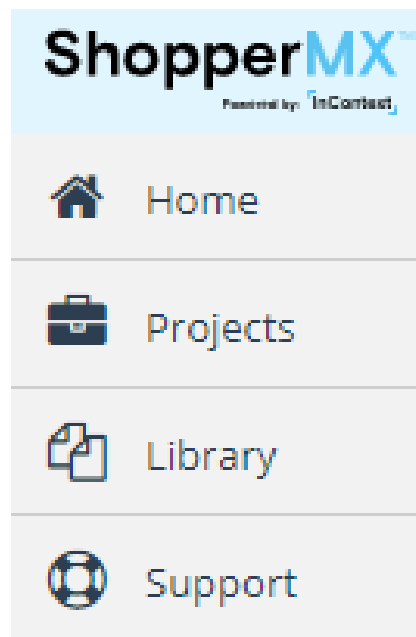
Home – takes you back to the main page

Project – all projects you have created or have been given access

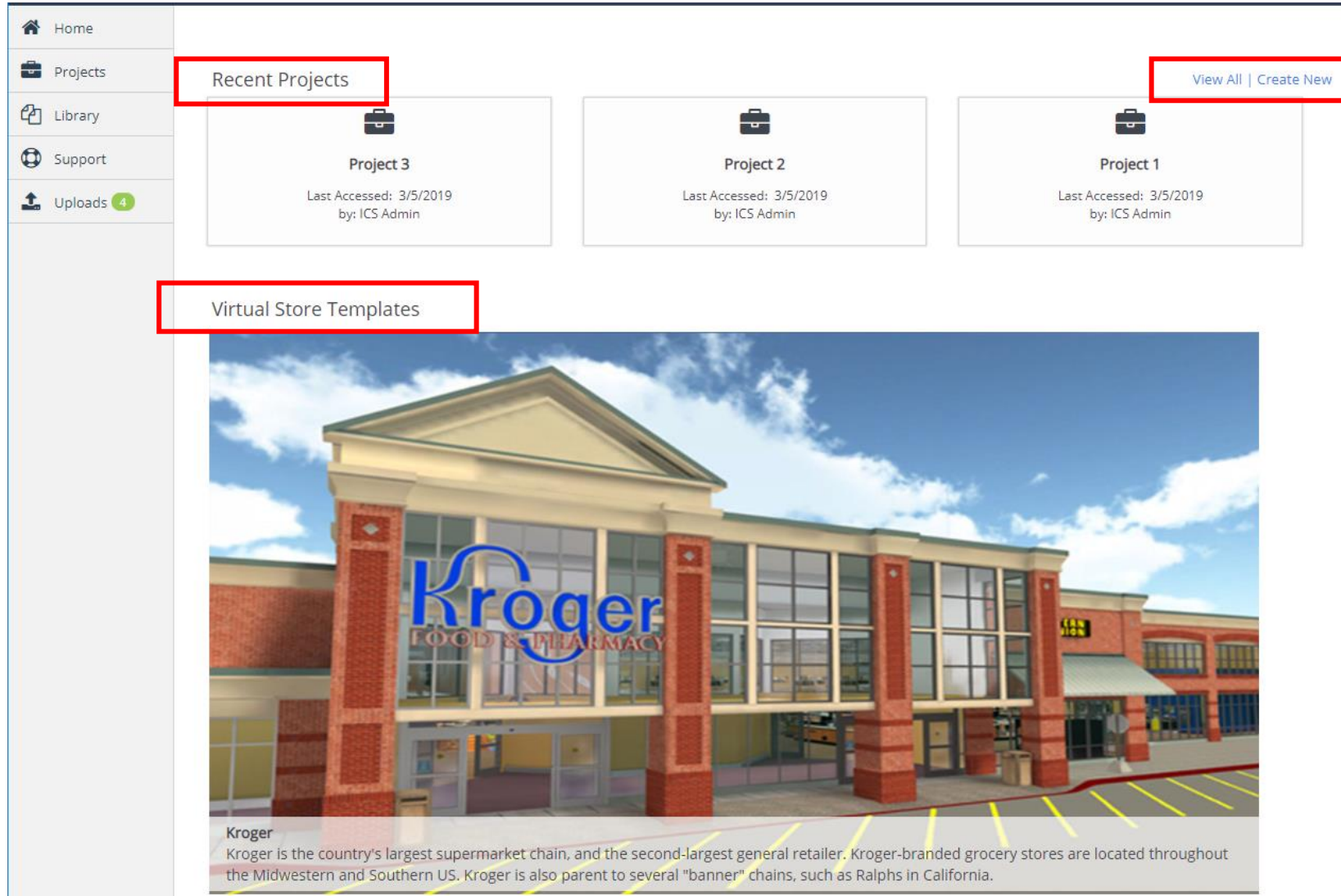**Library** – view of all assets: stores, POGs, products, signage & displays

Support – ShopperMX help page

Tip: !
In addition to the support tab, for all inquiries feel free to reach out to a member of the client services team at InContext at anytime.

How to Navigate the Home Screen – Part 2

Recent Projects – SMX shows you the 3 most recent projects you have created or have been given access to

View All – same as project function on previous page

Create New – Create a new project

Virtual Store Templates – lists 3D stores available to you

Note:

Clicking 'View All' and clicking the Projects tab brings you to the same page.

What is a ShopperMX Project?

- A **project** houses **all content**
  - 3D Assets: stores, planograms, signs, displays, products
  - 2D Assets: screenshot images, VAA reports, videos (Media Collections)

- Where you control **Project Assets** to other users
  - If you have created a project, you can give project access to another ShopperMX User

- Where you can **Upload**, **Create New**, or **Copy** content from other projects you have created or been given access to

A ShopperMX Project = 'Virtual Cabinet'

What is a ShopperMX Project?

3D Content 2D Content

Coworker's Project

Copying Assets

3D Content 2D Content

Project Access
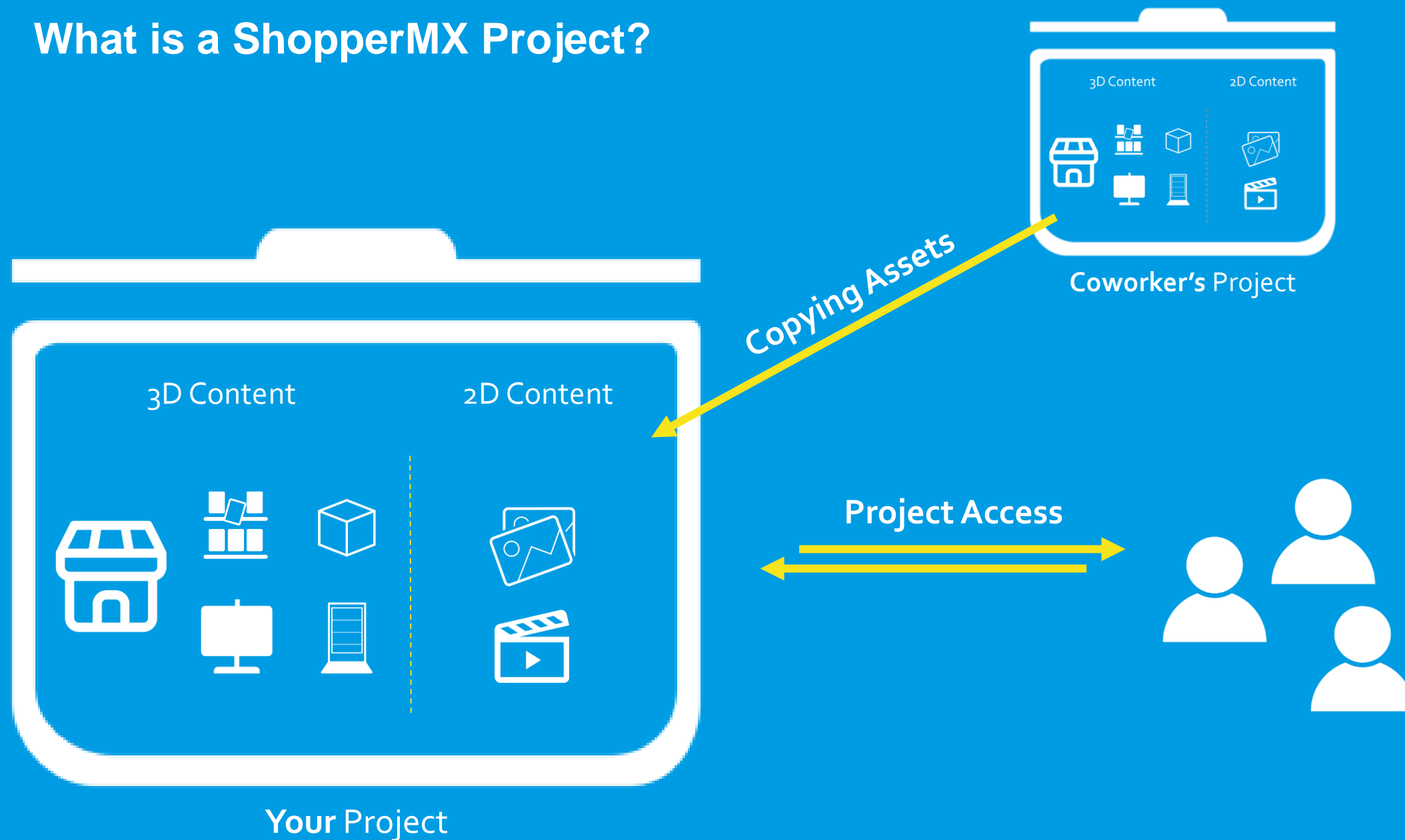
Your Project

How to Create a New Project

Step 1 - From the **Home** or **Project** tab on the main page, click on **Create a New Project**

Create a New Project

Step 2 - Fill out the project **Name & Description** page: project name, description (optional). Click the **Save & Open Project** icon. You have successfully created a project!

Create New Project   Save & Open Project   Cancel

| Name & Description |
| Manage Project Access |
| Key Contacts |
| Culture Settings |

Project Name & Description
Use this area to communicate your project's name and business goals.

*Required field

☐ Make a Master Project ❓ (only available to ICS Admins)

* Name

[Enter a name for your project]   ⓘ Required field

Description

[Enter a project description]

Note: 📓

You can optionally manage project access, key contacts, and culture setting from this page too. Just click the options on the left to adjust those settings.

Project Assets & Media Collection

Project Assets include all content used in ShopperMX:

> **Stores Concepts** – virtual environments licensed to you
> **Planograms** – In aisle, cooler doors, end caps
> **Products** – Virtual product models
> **Signage** – Create with .jpg or .png image files
> **Displays** – Create and visualize displays from included standard or custom display templates

Media Collection: Any content captured in ShopperMX is automatically saved in the Media Collection on the project's home page.

- 🎥 **Recordings:** 2-minute videos that can be downloaded or emailed directly from ShopperMX
- 📷 **Screenshots:** Pictures of your virtual concepts, can be downloaded or emailed from ShopperMX, or available for Visual Attention Analysis (VAA)
  User Videos: Where to find videos uploaded by you
  Photos: A place to import your own photos for VAA

Project Assets

Store Concepts   Planograms   Products   Signage   **Displays**

Create New | Copy from...

Media Collection

Recordings   Screenshots   User Videos   Photos

Generic Grocery Snapshot
by: **ICS Admin**

Generic Grocery Snapshot
by: **ICS Admin**

Generic Grocery Snapshot
by: **ICS Admin**

Generic Grocery Snapshot
Generic Grocery @ 1/30/2017 3:44:33 PM
Associated Stores:
Generic Grocery
Visual Attention Analysis Report:
Download VAA Report

Delete   Edit Details   Download   Email

How to manage Project Access

By default, project access is restricted to only the user who creates the project. To enable access for other users within your organization, navigate to the Project Actions area of your project's home page.

To give other users access to your project, follow these steps:

Step 1 - Select the **Manage Project Access** button under 'Project Actions'

Step 2 – Select **'Add Users'** button

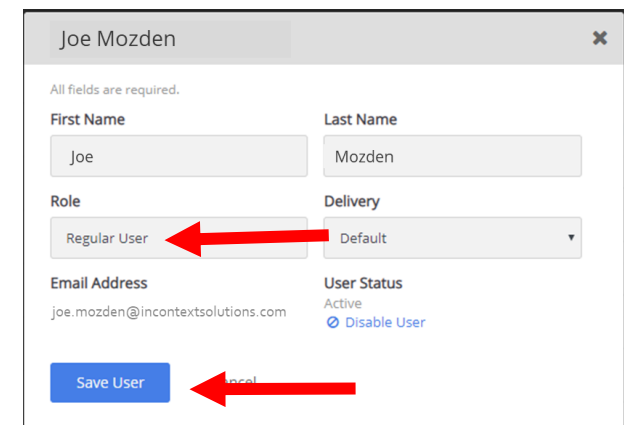**Step 3 –** Type in email or name of SMX user you'd like to provide access to then click **Add Users**
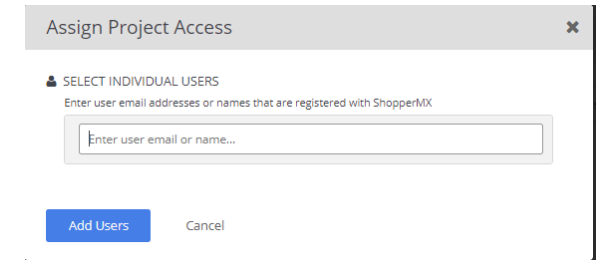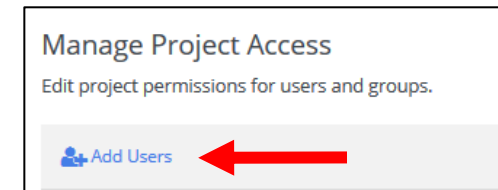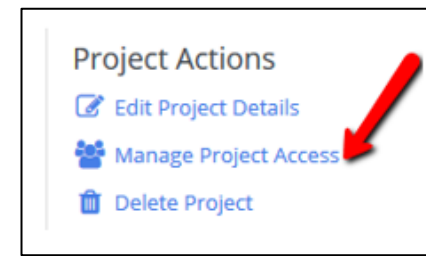
Step 4 – Once added new user, select name of individual to edit **access level**:
   Regular User: Full access to create and edit all assets
   View Only: Restricted to only view existing assets
   Project Admin: Full access to create and edit all assets and project access

Step 5 - Select **Save User Access** or **Cancel** to save or discard your changes, respectively.

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Project Actions
Edit Project Details
Manage Project Access
Delete Project

Manage Project Access
Edit project permissions for users and groups.
Add Users

Assign Project Access
SELECT INDIVIDUAL USERS
Enter user email addresses or names that are registered with ShopperMX
Enter user email or name...
Add Users   Cancel

Joe Mozden
All fields are required.
First Name   Last Name
Joe   Mozden
Role   Delivery
Regular User   Default
Email Address   User Status
joe.mozden@incontextsolutions.com   Active
                    Disable User
Save User

Lesson One Summary

In this lesson we learned...

- Logging in to ShopperMX
- Creating a new project
- Grant project access to all users on team
- Copy a store into your project
- Navigation

Lesson Two

Planograms and Products

Creating Planograms in ShopperMX

There are three ways to create a planogram in ShopperMX:

1) **Import** allows for uploading .PSA files, see the following slides for more information
2) **Create New** allows you to build a planogram manually by adding shelving and products
3) **Copy from…** allows you to copy a planogram from an existing project.

Project Assets

Store Concepts   **Planograms**   Products   Signage   Displays

Import | Create New | Copy from...

Note:
Remember – planograms and other assets are housed at the project level.

How to upload a .PSA file into ShopperMX

Step 1 – Click on **Import**, under Planograms. Either drag and drop your file in the blue section or click 'Select files' to pick the file from your computer. Click on **Continue.**

Make sure to click 'Import Options' if you want to maintain current product data or overwrite existing product data with your .psa information. Click 'Save Settings'.

Step 2 – Once your Planogram has successfully imported. You will see the page below. You have the option to import your product images (See Import product images for more information); download image status (missing images) by products or go back to project.
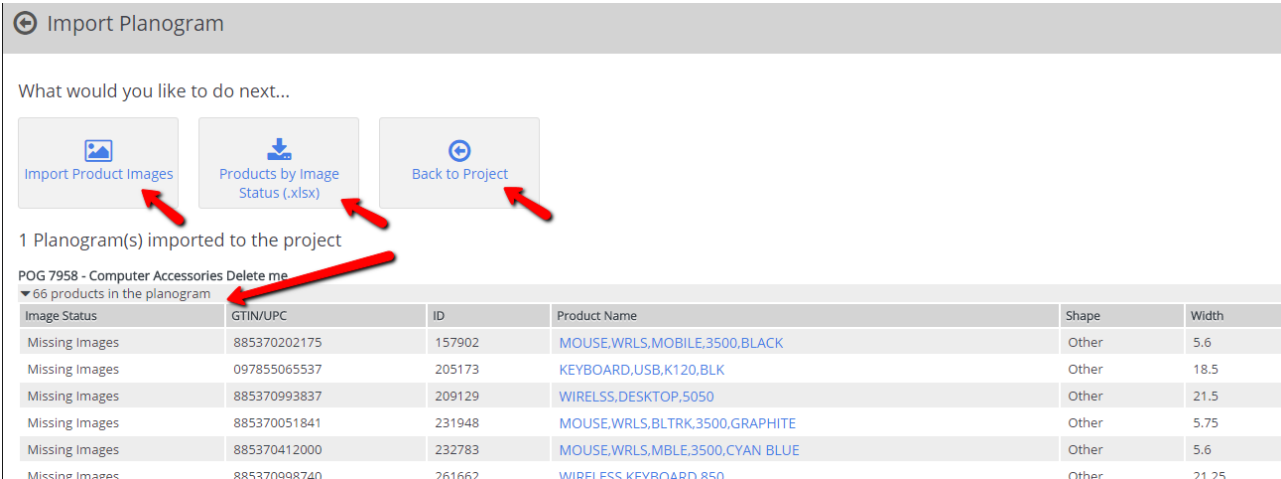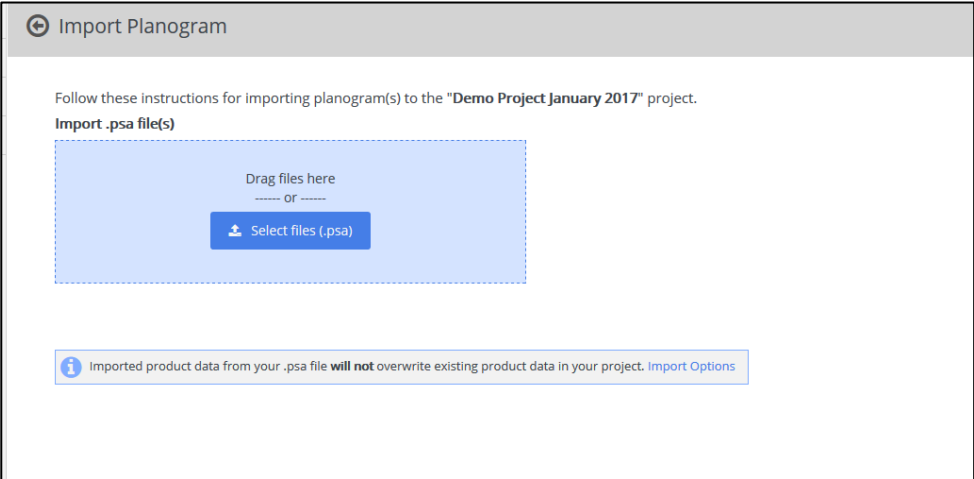
.PSA Fields Currently Supported by ShopperMX

On Planogram:
- ❑ Name
- ❑ Size

On Shelves:
- ❑ Type
- ❑ Position
- ❑ Size
- ❑ Peghook Spacing

On Layouts (Products on Shelf):
- ❑ Position
- ❑ Facings
- ❑ Orientation
- ❑ Cap
- ❑ Cap Orientation

Supported Fixture/Shelving Types:
- ❑ Shelf
- ❑ Pegboard

On Products:
- ❑ UPC
- ❑ ID
- ❑ Name
- ❑ Dimensions
- ❑ Size (unit size)
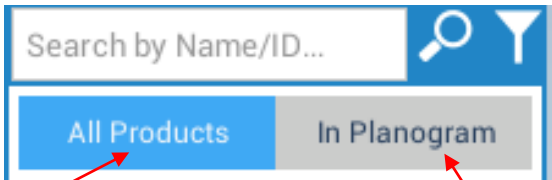- ❑ Manufacturer
- ❑ Category
- ❑ Brand
- ❑ Sub-category
- ❑ Price

How to edit a <u>Planogram</u> – Part 1 (Navigation)

Open your POG by clicking on the name under the **Planogram** tab.

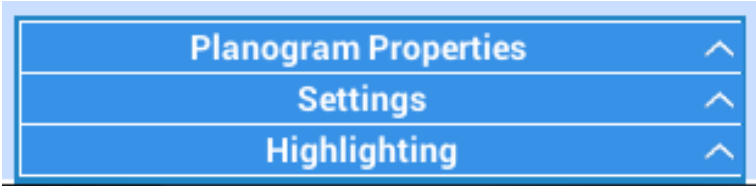**File** 📄 **–** Save, Delete, Close

Products 📦 **–** list of all products

List of all products that are in your project

List of all products that are currently in your Planogram

Shelves **–** choose different shelf options to add to your Planogram. Click, hold and drop the shelf onto the screen when you want it to be placed

Planogram Properties – ** select **Price Tag on or off.

Settings – turn on or off Vertical Measurements, Horizontal Measurements or Error Highlighting.

Highlighting – visualize your product data by color coding manufacturer, brand, category, subcategory, etc… Note: your data must be clean for this feature to work successfully.
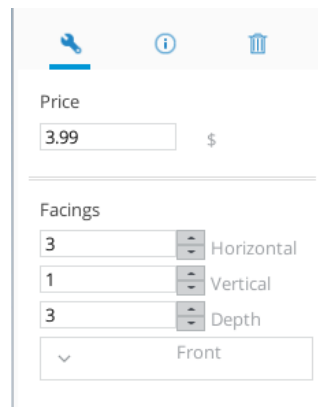
Tip: ❗
ShopperMX doesn't automatically save your work so make sure you save often when working.

How to edit a <u>Planogram</u> – Part 2

Open your POG by clicking on the name under the **Planogram** tab.

Click on a product to edit its properties or move it around the planogram by just dragging and dropping it.
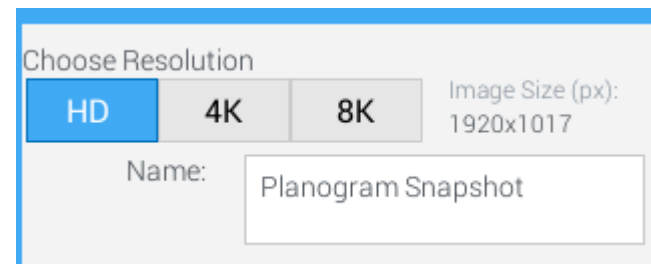
Undo – Undo last change made to POG
Help – See help menu with all actions and controls

Work in 2D or 3D, and take high resolution screenshots of your planogram

How to edit a Planogram – Part 3 (Shelf)

Open your POG by clicking on the name under the **Planogram** tab.


Edit Shelves – Select the shelf. The **Default Shelving** pop-up window will appear on the screen. You can edit the **Shelf Size** dimensions by typing in the measurement and clicking enter. To move the shelf, click, hold and drag to desired location, or use the **Shelf Location** x-axis and y-axis to designate the location, press enter.

Edit Product Alignment – Select the shelf. Select the alignment icon. To manually arrange products, click the **None** icon. You can now move products freely on the shelf.
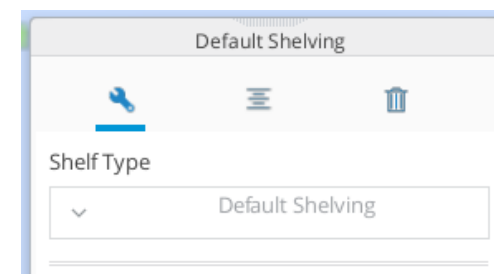
Change Shelf type – Select the Shelf. Under **Shelf Type,** click on the drop-down arrow to switch to a different shelf type.
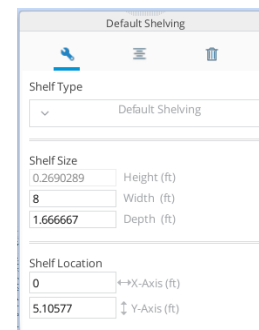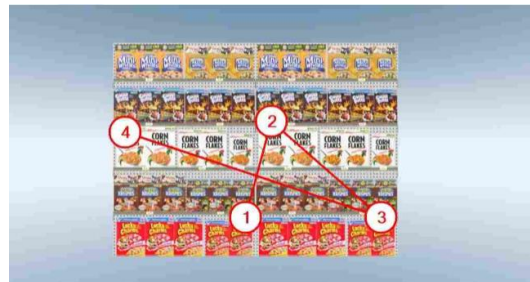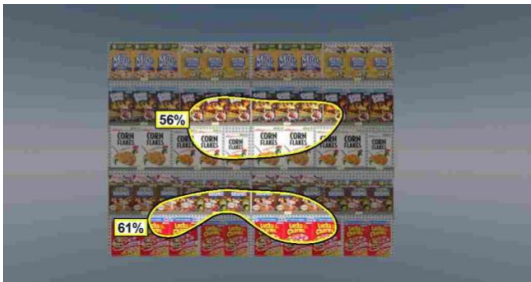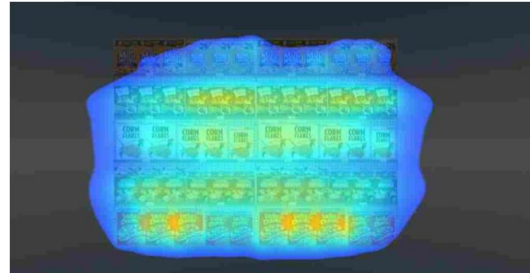
Edit Shelves
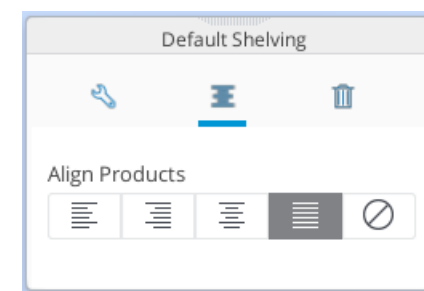
Edit Product Alignment

Change Shelf type

How to utilize planogram editing feature

Virtual Attention Analysis (VAA) – Heat Map Report

How to download the VAA Report

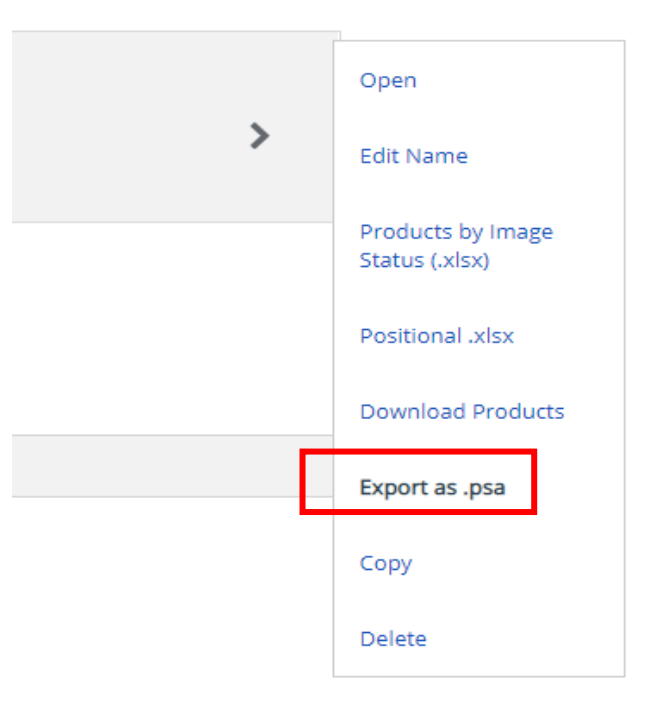Step 1: Once you save the screenshot, go back to your Project Home Page on ShopperMX.com

Step 2: Go to the Media Collection

Step 3: Click on the screenshot, then click "Create VAA Report". Click on "Download VAA Report" to download to your internet browser to view report. The report will also be emailed to you.

How to utilize planogram editing feature

Planogram Exporting

Open

Edit Name

Products by Image
Status (.xlsx)

Positional .xlsx

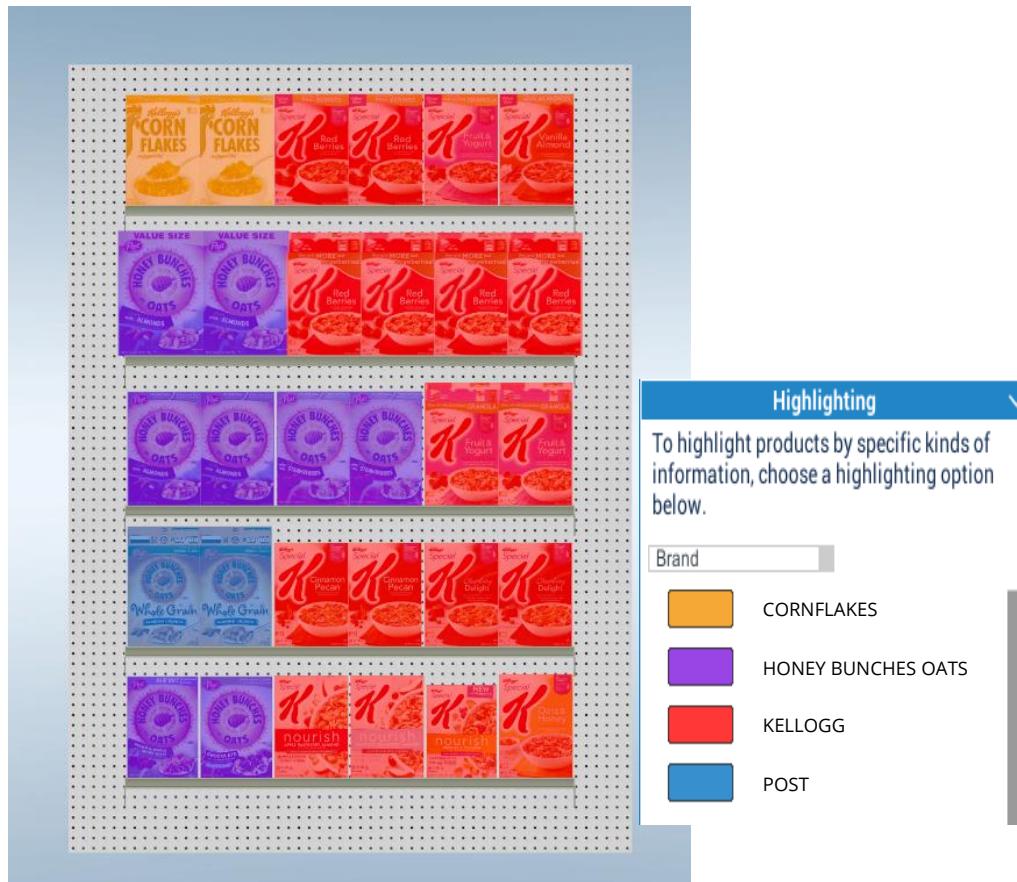Download Products

Export as .psa

Copy

Delete

If you edit your planogram in ShopperMX, you can **Save** it and **Export** the new planogram as a .psa

How to use Planogram Highlighting

Step 1 – Ensure you have clean data in your .psa file.

Step 2 – Click the drop-down key to select the product attribute you would like to highlight.

Step 3 – Click on the color box to select a different color.

Highlighting

To highlight products by specific kinds of information, choose a highlighting option below.

Brand

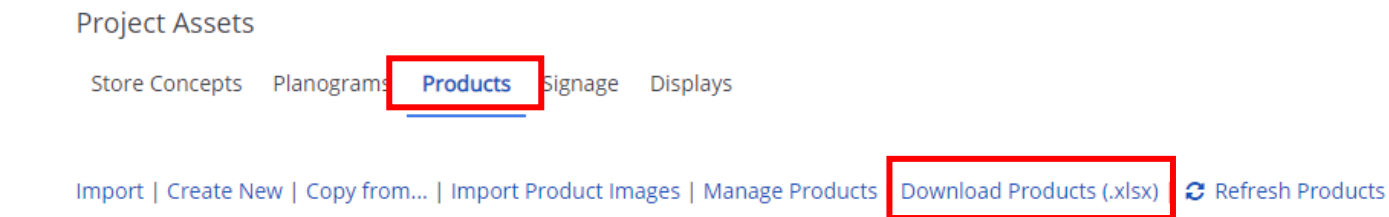- CORNFLAKES
- HONEY BUNCHES OATS
- KELLOGG
- POST

Tip: !
Highlighting is an excellent way to showcase recommendations like segments, brands, pack types, and price tiers.
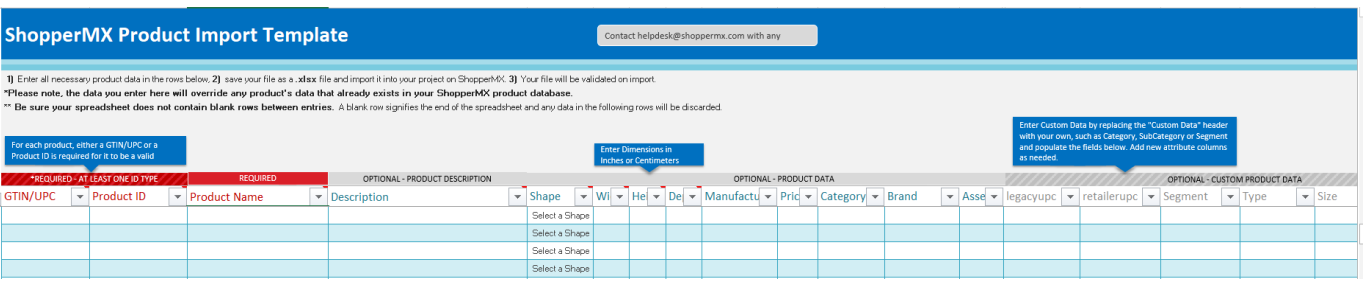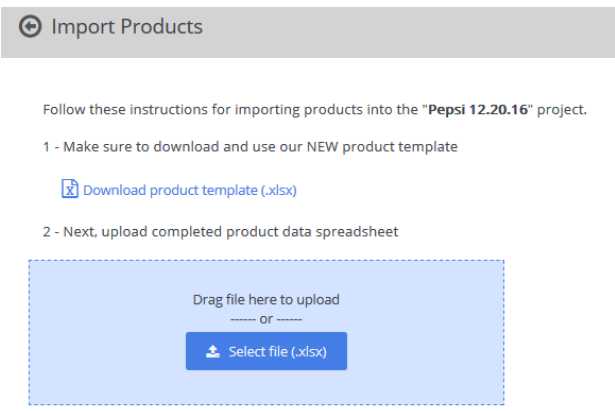
How to Edit <u>Planogram Highlighting</u>

Step 1 – Click '**Download Products'** under **Product** tab in project page.

Step 2 – Edit product data or add columns you would like to highlight, save import .xlsx

Step 3 – Select **Import** under **Products** tab. Select file saved in step 2. Highlights will be updated once import is complete.

Getting products in ShopperMX

Primary Option: Products will be imported from a JDA file

Secondary Options: Instead of *copying from* you can…
- **Autowrap**: Create products yourself with product images
- **Import**: Import bulk number of products with metadata

Note:

Even though you will mostly be using the primary option, if you would like to use one of these secondary options, reach out to a member of the Client Services Team at anytime.

ShopperMX Assets - Products

There are 2 options to create products in ShopperMX:

Autowrap – ShopperMX feature (DIY)

- **What is it:** ability to upload images and wrap those images on one of our 6 shape offerings (box, bag, can, bottle, six pack or other)
- **When to use it:** if you have access to an image provider
- **Advantages:** user is in control, 1-2 day turn-around
- **Caution:** Image provider may not have all 6 sides, high resolution or haven't properly cropped out the white space which may result all result lower quality

Custom Model – ICS Service ($75)

- **What is it:** full service product modeling (acquisition, photography & 3D modeling)
- **When to use it:** if you don't have access to photography
- **Advantages:** high quality, quick turn-around, full service

What Makes our Clients Successful: Master Libraries

What is a Master Library?

A **Master Library** is a central source of high-quality product images & data.

How can you build your Master Library?

- Prioritize your top projects & identify categories/products in those projects
- Work with your image provider to pull those images – best process is to have a .psa file linked to those images
- Create a new project in ShopperMX: Master Library
- Import planogram & link .psa file UPCs to image files for auto wrap
- Continue to build additional categories in order for all users to have access to multiple products

How to create auto wrap products in ShopperMX:

Project Assets

Store Concepts   Planograms   **Products**   Signage   Displays

Import | Create New | Copy from... Import Product Images | Manage Products | Download Products (.xlsx) | ⟳ Refresh Products

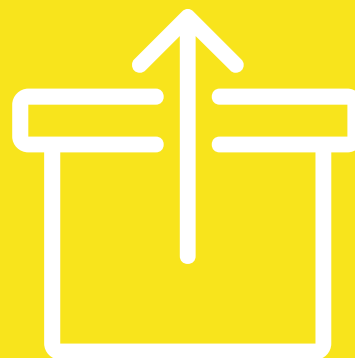Create New Product

OR

Import Product Images

- **Amount:** 1-10 products (one by one)
- *Manual process*
- *More flexibility with image naming guidelines*

- **Amount:** 10+ products (import in bulk)
- *Streamlined process*
- *Must follow exact image naming guidelines*

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How to access products in ShopperMX

Project Assets

Store Concepts   Planograms   **Products**   Signage   Displays

Import | Create New | Copy from... | Import Product Images | Manage Products | Download Products (.xlsx) | ↻ Refresh Products

Import Planogram File

ShopperMX will link the UPCs in your .psa file to the Master Library
Pro: Streamline process
Con: you need to make sure you .psa file has accurate data

Copy From…

Copy all products into your project
Pro: you have access to all products with Master Library
Setback: you may not want so many products in your project

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ShopperMX Assets – Creating Individual Products

Step 1 – Click **Create New** under the **Products** tab.

Step 2 – Fill in required product information **Name**, **GTIN/UPC, Shape, Dimensions**

Step 3 – Select a box to upload an image of each side of the product.

Step 4 – Click save product

ShopperMX Assets – Creating Products in Bulk

What will you need:
- ❑ Product information: .psa file data or SMX product data
- ❑ Product images in correct naming convention

After importing your planogram, SMX will have all the necessary information to create a shape for your product: Name, UPC, Shape, Dimensions.

Step 1 – Select **Import Product Images**

Step 2 – Ensure your product images follow the correct naming convention (Image File Guidelines). Click, drag and drop your image files into the importer. As long as the image file UPCs match the UPCs in your .psa file, the process is quick and easy.
- • Supported file extensions are: .png, .jpg, .tga, .bmp and .zip (containing image files).

Step 3 – Your products are now processing and will take about 30 seconds per product

Creating Products in Bulk – PRO TIPS

Becoming a Pro:

- Uploading high resolution images can make the system run slower or even error out
  - *TIP*: break up the upload in batches

- Images do not match and you are getting multiple errors –
  - *TIP*: sometimes it's easier to change your .psa file UPCs versus renaming all your images
  - *TIP*: but if you decide to rename your images, Bulk Rename Utility is a great 3rd party software

- Image providers often uses .tga file types but doesn't include it in the naming convention. In order to upload images into SMX, you must either zip the files or add the extension.
  - *TIP*: determine whether or not you need to zip the files or add the extensions.

- If you are working with several private label products, create your own master library with all product label images specific to your retails or region
  - *TIP*: create a separate library of private label products. When you need to use them in your planograms, you must use the "copy from" feature before importing your .psa file.
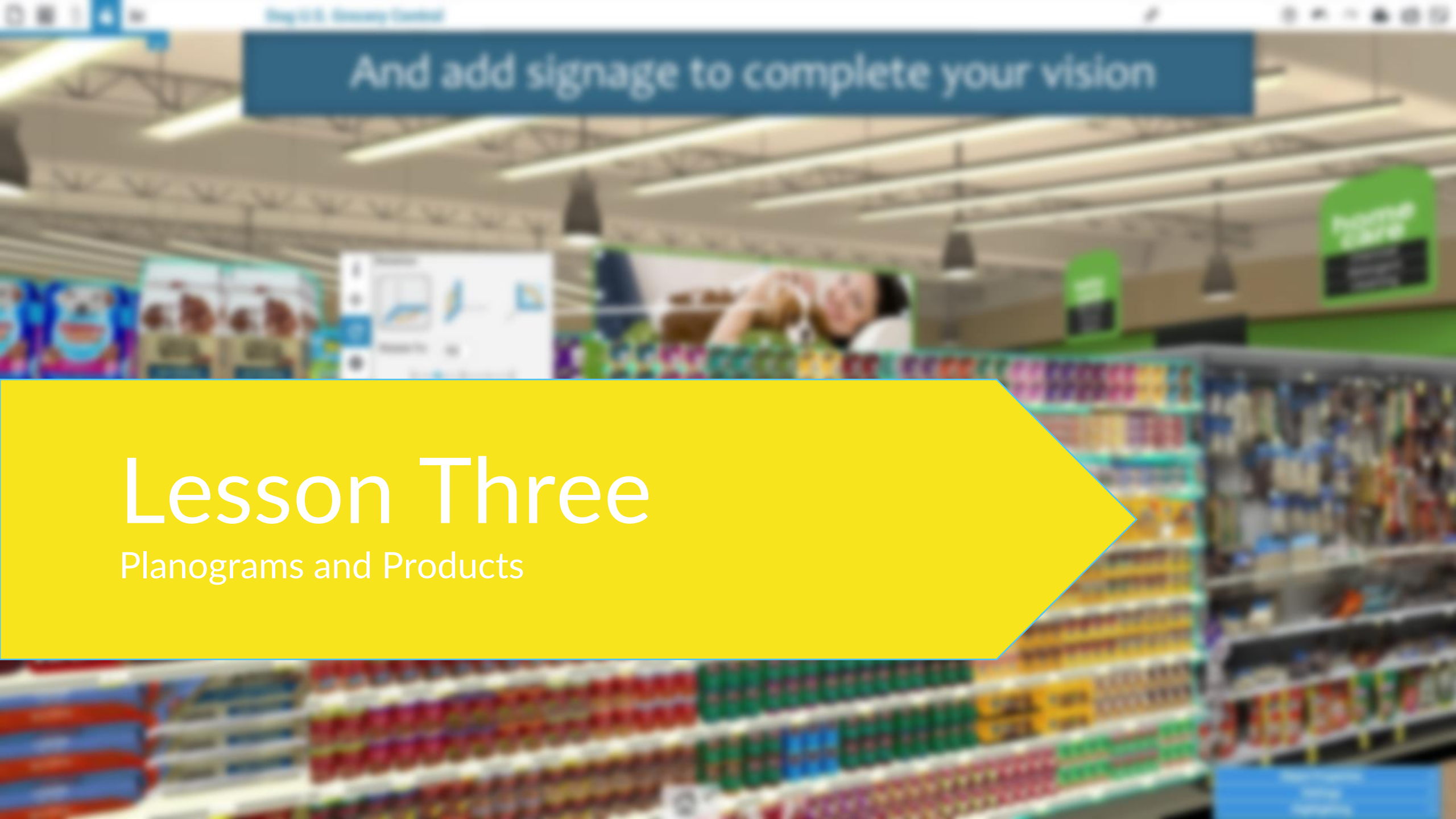
Lesson Two Summary

In this lesson we learned...

- Creating and editing planograms
- Products
- Highlighting
- ⭐ *Let's try it out...*
    - Import a new planogram
    - Turn on product highlighting

Lesson Three

Planograms and Products

How to Create & Save a <u>Sign</u>

Step 1 – Under the **Signage** tab, click **Create New**.

Step 2- Enter the **Name** and **Description**. *Note: ShopperMX will not allow you to create a sign without a name*

Step 3 – Click the **Upload Image Files**. *Note: ShopperMX only supports PNG or JPG file times. It does not support PDF.*

Step 4 – Choose your **Template**. Scroll down the screen to select the template that best fits the dimensions of your image.

Step 5 – Click **Next-Design Sign.** ShopperMX Sign Builder will open.

Step 6 – Click on the image and drag it onto the template. **Scale, Rotate, Mirror** or **Clear** the image to start over. When complete, click **Preview.**

Step 7 – Click **Save** to finalize your signage or **Back to Editor** to make changes.

Project Assets

Store Concepts   Planograms   Products   Signage   Displays

Create New | Copy from...

Create Signage   Next - Design Sign

Name and Description
* Name
Enter name   ⊘ Required field

Description
Enter description

*Image Upload
⬆ Upload Image Files

Image Upload Information
• Several image files can be uploaded at once by using Ctrl-select
• Supported file types are .png, .jpg
• Existing images will be available for any signs you create, until you log out of your session.

*Choose a Template
Search for the Template. Click on the image below to select.
Search Signage Templates

4.5" x 24" Banner   a_3FT_Seasonal_Segment   a_side_panel

Tip: !
Select Signage template that best fits dimensions of your image file for the best results.

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How to Create a <u>Display</u>

Step 1 – Under the **Display** tab, click **Create New.**

Step 2 - Enter the name and description.

Step 3 – Choose your **Display Template.** Note: there are 3 kinds of displays, **Static:** does not allow you to merchandize with products (example: shopper avatars); **Dynamic:** allows product placement on the display; and **Customizable:** built by InContext just for the client

Step 4 – Click **Save & Open**

Tip: !
You can add signs to displays, making it easier to move and place the display and signage in store!

Project Assets

Store Concepts   Planograms   Products   Signage   **Displays**

Create New | Copy from...

How to edit a <u>Display</u> – Part 1 (Navigation)

Open your Display by clicking on the name under the **Display** tab.

File 🗋 **–** Save, Delete, Close

Products 📦 **–** list of all products that are in the project, and/or in the currently Display.

**Shelves** ☰ **–** choose different shelf options to add to your Planogram. Click, hold and drop the shelf onto the screen when you want it to be placed

Help – ⑦ See help menu with all actions and controls
Undo - ↰ Undo last change made to display
Snapshot - 📷 Take screenshot of display
Rotate the view – Use the right click button to rotate your view around the display to edit all sides

Planogram Properties	∧
Settings	∧
Highlighting	∧
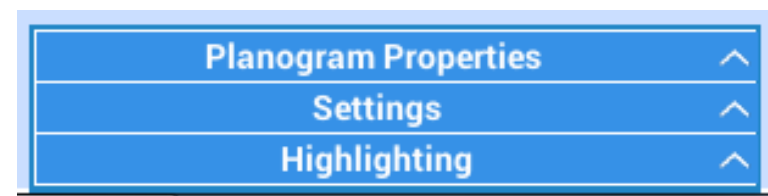
Display Properties – select **Price Tag** on or off.

Settings – turn on or off Vertical Measurements, Horizontal Measurements or Error Highlighting.

Highlighting – visualize your product data by color coding manufacturer, brand, category, subcategory, etc… Note: your data must be clean for this feature to work successfully.

Tip: ❗
ShopperMX doesn't automatically save your work so make sure you save often when working.

InContext

How to Edit a Display – Part 2 (Adding Products & Signs)

Add Products – Click on the Product tab. **In Display** shows all the products in your current display. **All Products** shows all the products in your project. Search by the product name or UPC. Click, drag and drop the product on a shelf in your desired arrangement and order. *Note - You cannot drop multiple products at a time.*

Edit Product Facings – Select the product once placed on display. The pop-up window will appear. Under **Facings** enter the number of **horizontal, vertical or depth** facings, press enter or use the up and down arrow keys to increase and decrease facings. Change the **Facing Orientation** by selecting the drop-down arrow. Add **Cap** by entering the number or using the arrow keys.

Placing Signs – Click on the Signage menu. Click, drag and drop your sign onto your display. Use the signage menu to adjust the size, position or rotation of display.
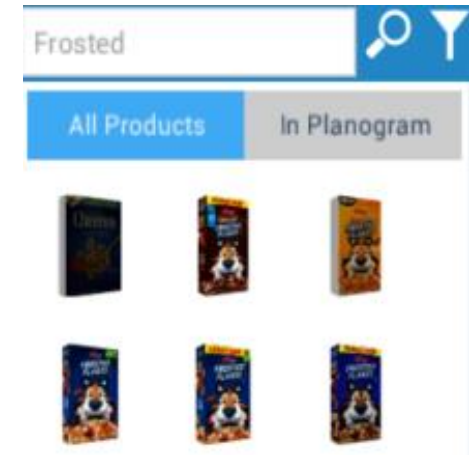
Lesson Three Summary

In this lesson we learned...

- Creating and editing signs
- Creating and editing displays
- ⭐ *Let's try it out...*
  - Create a sign
  - Create an avatar

Change store layouts

Lesson Four

Design Layout and Presentation Capabilities

Copying Stores

Step 1 - From the **Stores Concepts** tab, click **Copy From**

Project Assets

Store Concepts   Planograms   Products   Signage   Displays

Create New | Copy from...

Note:

Copying stores does NOT affect the original concept. You are simply creating another copy for yourself (think of it like copying a word document or PowerPoint from someone else.)

Step 2 – Choose the store you would like to copy and click **Copy**. You will be directed to the **Stores Concepts** tab where you will see your copied store.

Copy   Total Stores: 73   Number Selected: 2 | Clear

	NAME	STORE TEMPLATE	PROJECT NAME	LAST UPDATED ↑
☑	Training 5.7.21	InContext Grocery	Testing for Training	5/12/2021

How to create a **Store**

Step 1 - Click on the **Store Concepts** tab. Click on **Create New**.

Step 2 - Type your store name and description.

Step 3 - Select the store template by clicking on the store or searching for the store concept with the search bar. Click **Save & Open**.

Project Assets

Store Concepts   Planograms   Products   Signage   Displays

Create New   Copy from...

Store Name and Description

* Name

Training Store

Description

Training Store for dd/mm/yyyy

Click on the image below to select the store template you want to use to create a store concept.

Selected Store Template: **Walmart**

Walmart

Walmart   Walmart Neighborhood Market

Walmart is an American multinational retail corporation that operates   Long Island, New York
a chain of discount department stores and warehouse stores.

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How to **Navigate** the virtual store – Part 1

File – Save (Ctrl + S) and Close (Ctrl + Q)

Edit – Undo (Ctrl + Z), Redo (Ctrl + Y), and Duplicate assets (Ctrl + D)

Presentation – Create a link to send to others to follow a walk through

View – View panels and adjust layout

Record a **video**
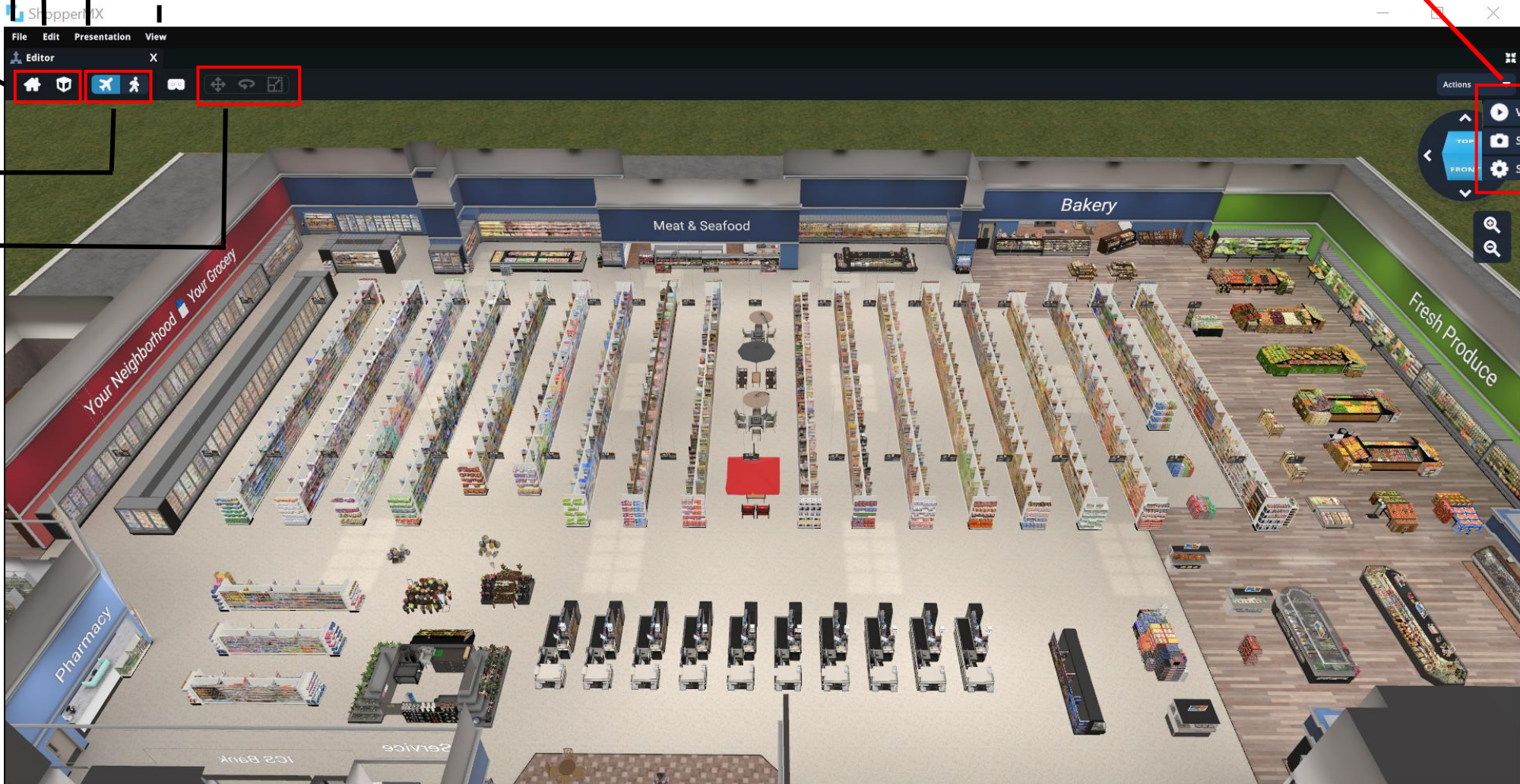Take a **screenshot**
Settings – adjust your height or movement speed

Home or **Ariel** view

Fly or **walk** navigation

Gizmos Adjusting or rotating assets
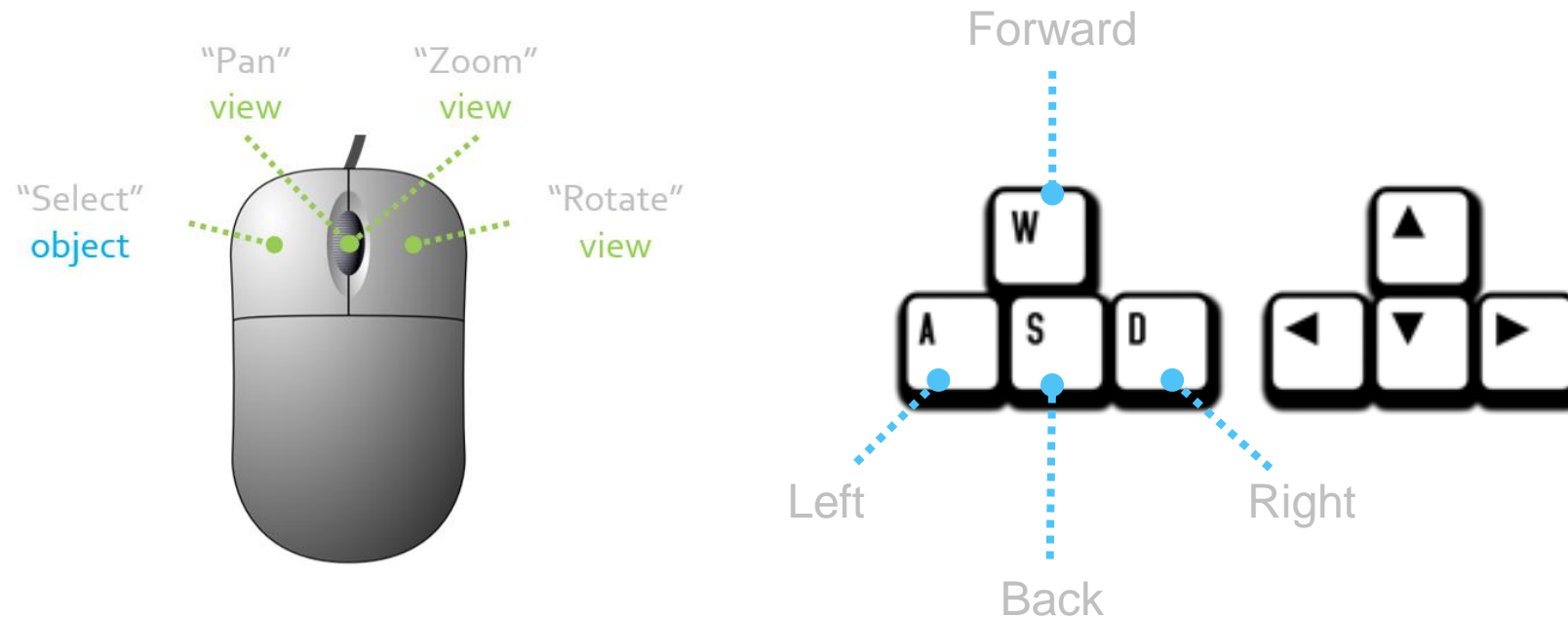
How to <u>Navigate</u> the virtual store – Part 2

Step 1 **– Double click** anywhere in the store to **drop to that section**, use your **mouse to scroll forward**, or use the **navigation options**.

Step 2 – As a best practice, **use your _mouse_** as your eyes to change your view points and _your keyboard_ (right, left, up, down arrow keys or W, A, S, D) as your feet to change your direction.
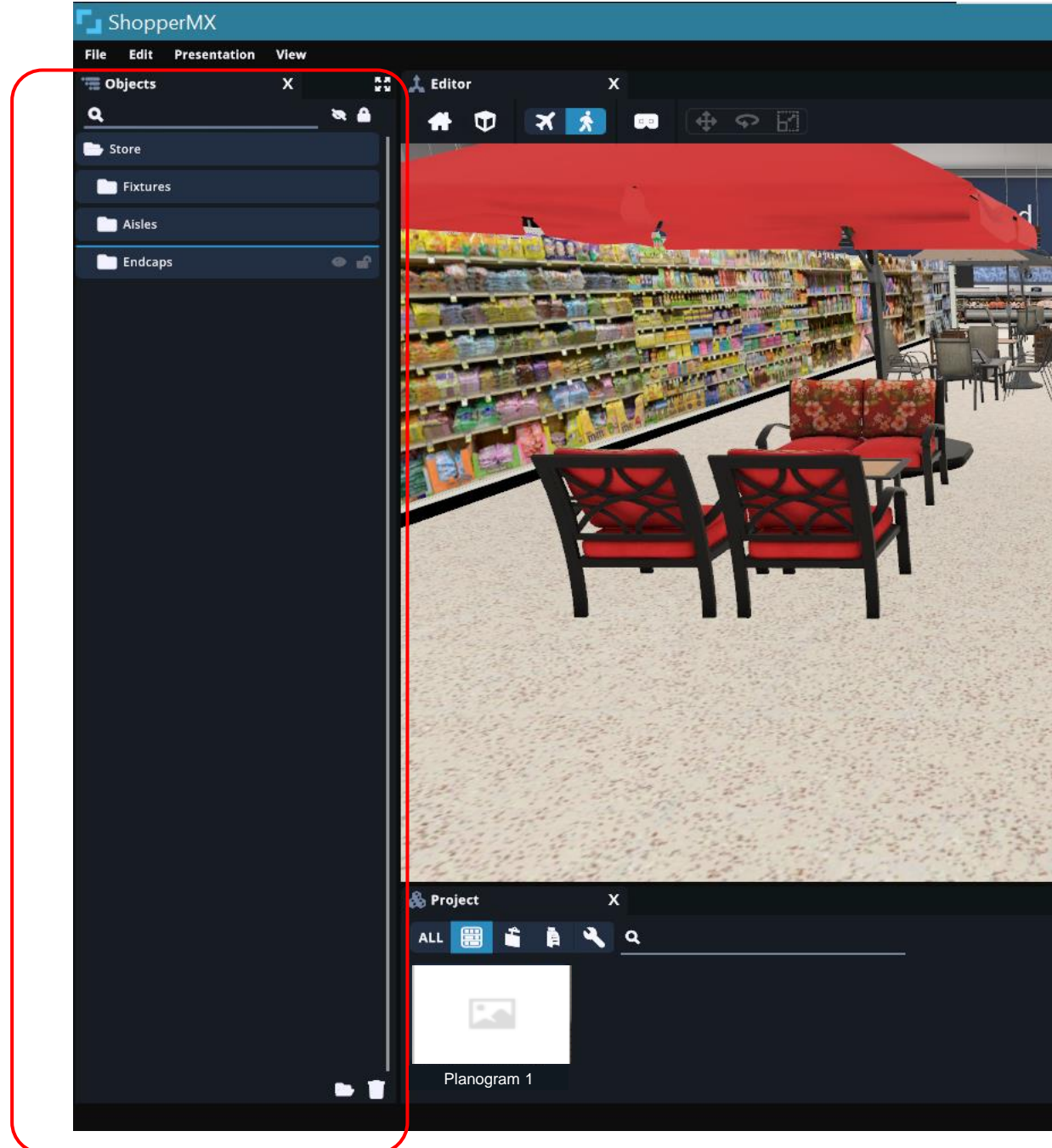
Object Panel

List View

- This panel is a list of all the objects that are currently in or have been added to your store / scene.

- They are organized by a file folder system.

  - *All Fixtures are in the Fixtures Folder which is in the Store Folder*

- Able to search for the name of an object in the store.

  - *When searching, you can click on the item in the object panel then click 'F' on your keyboard and it will take/fly you to that item in the store.*
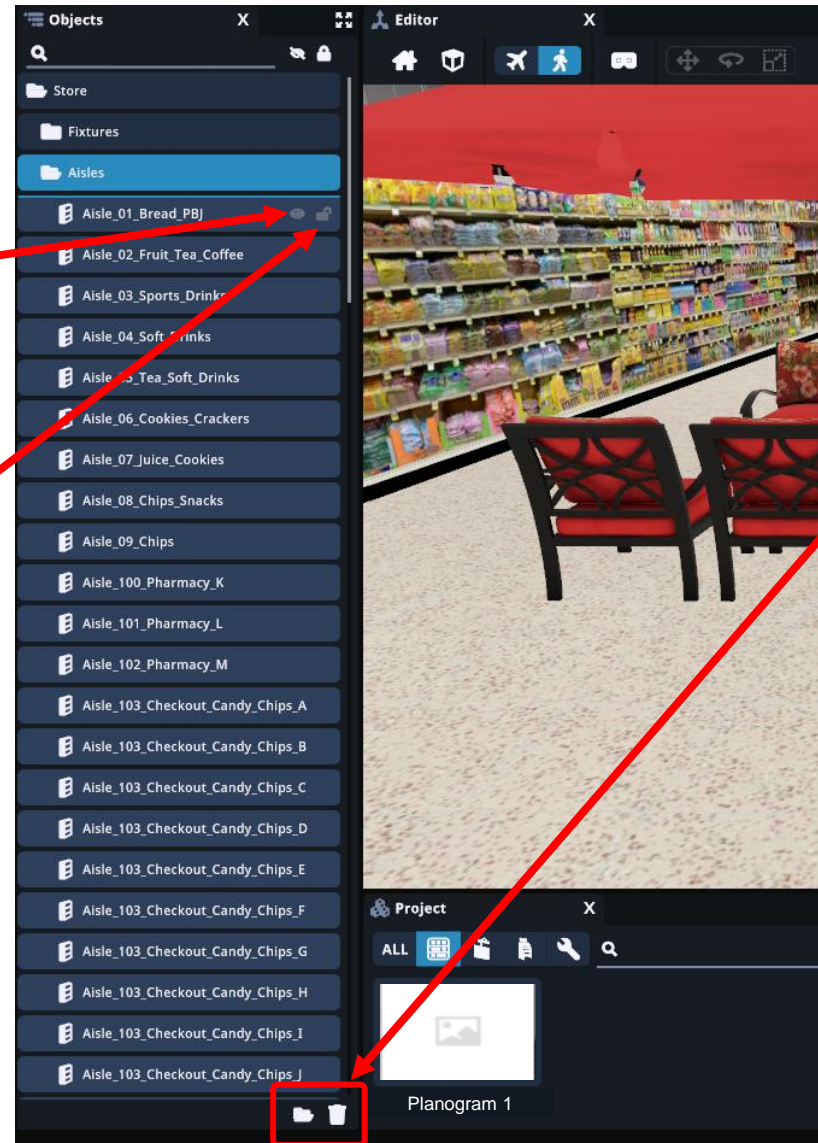

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Object Panel cont.

Item Actions

- **Visibility**: allowing the object to be toggled to a viewable or hidden state

- **Lock**: allowing the object to be toggled to a locked or unlocked state

Organization

- Users will have the ability to "**group**" objects together in folders by creating new folders

- These folders will also have the ability to toggle their visibility and lock-ability
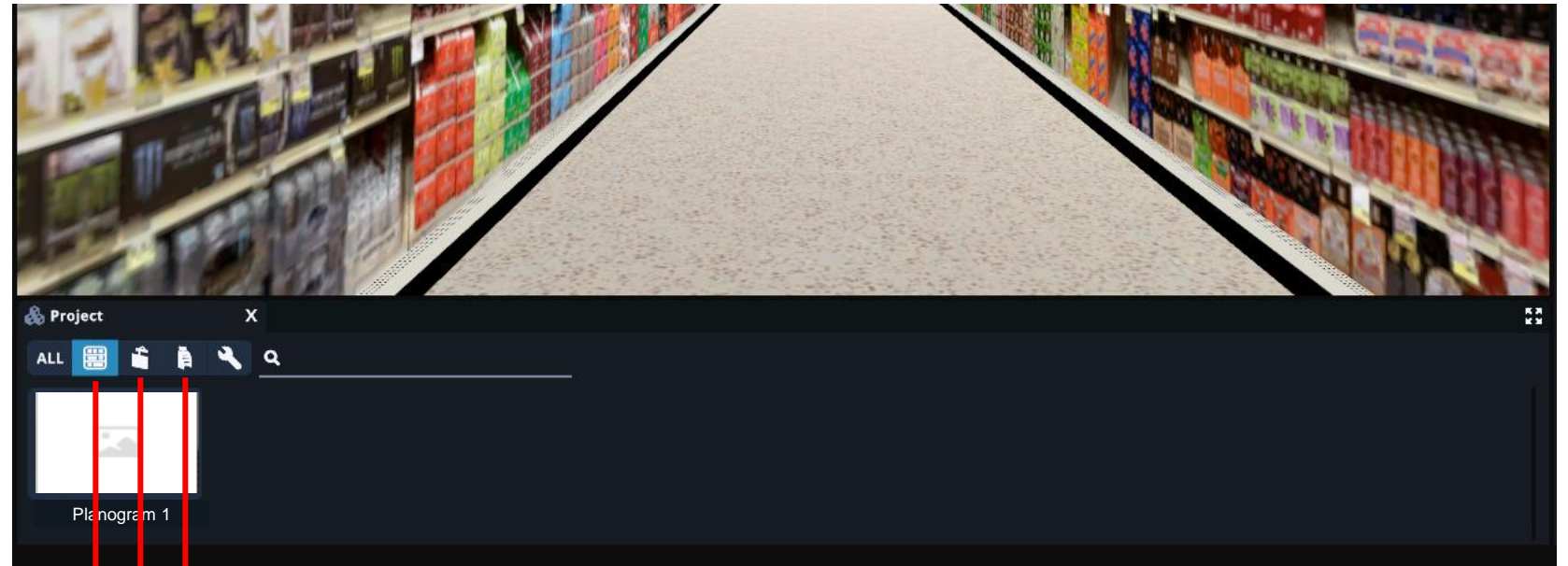
Tip: ❗
Creating a new folder and placing all contend for each visualization concept in a folder is great way to show different scenarios in store.

Design Store Layout Part 2 – Project Panel

Project Properties

- This is a panel where the user can access all the 3D asset types / content that can be added to a store
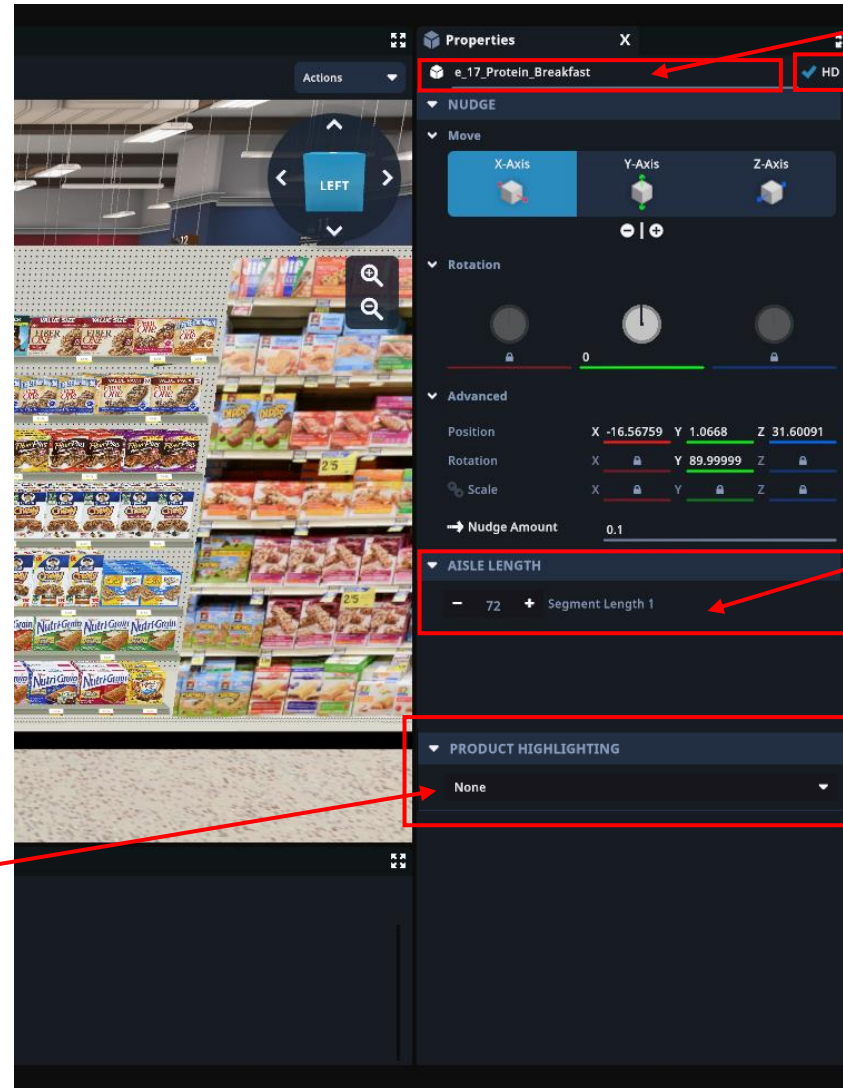

Displays

Signage

Planograms

Design Store Layout Part 1b – Properties Panel

Rename your object by clicking in the name bar and typing

Make your aisle HD by clicking this button

Edit aisle length here. Lengthening aisles or coolers allows you to fit any sized POG in any virtual environment

When selecting your POG, you can highlight your products based on certain categories *(update this in your product metadata in ShopperMX.com)*
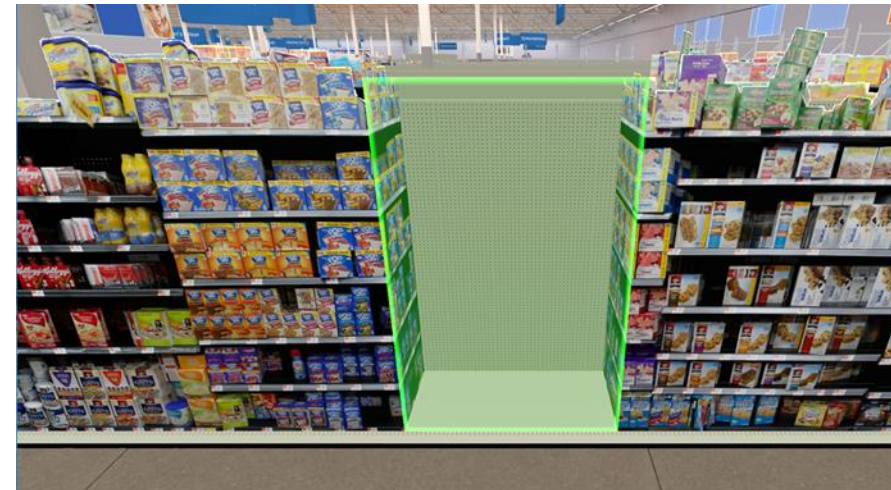
Design Store Layout Part 3 – Placing Objects in Store

Step 1 – In the Project Panel, choose Planogram, Display or Signage.

Step 2 – Click and hold down on the POG, Display or Sign you wish to place and drag it into the store. Unclick to place it. For planograms, make sure you see green highlighting when dragging in the object.
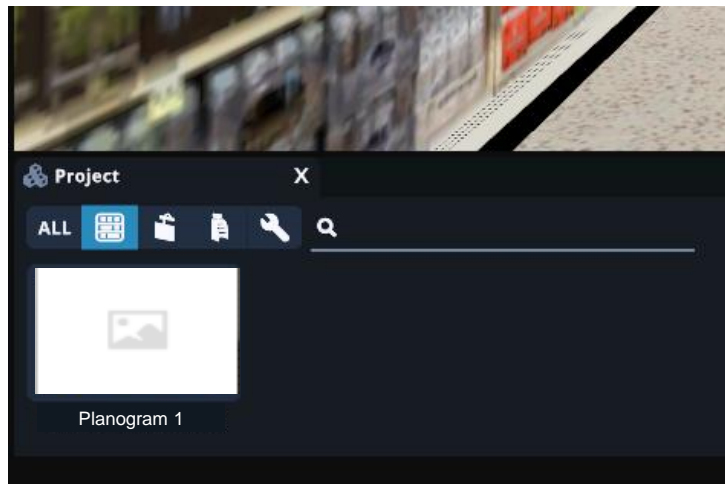
Step 1

Step 2

Project Panel – Adding a sign in store

Step 1 – Go to your Project panel, select signage, then select upload

Step 2 – Select a .png or .jpg from your computer

Step 3 – Voila! You can directly access your image from ShopperMX

Adjusting Objects – Gizmos Part 1

A gizmo is a UI system that helps the user know what they can do with a selected 3D object. Select the object to access the gizmos.

X/Y/Z - Plane Adjustment

Move your objects along the x-axis, y-axis, and z-axis.

Scale Signage

Make your items bigger.

Adjusting Objects – Gizmos Part 2

A gizmo is a UI system that helps the user know what they can do with a selected 3D object. Select the object to access the gizmos.

Rotation Panel X-Axis

Rotation Panel Y-Axis

Rotate your objects around on the x-axis, .

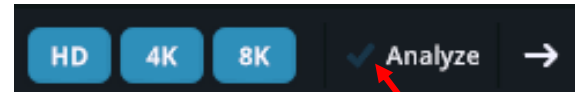*Rotate your objects around on the y-axis.*

How to take a Screenshot

Step 1 – Click the **actions** button then the screenshot button in the top right.

Step 2 – Select the resolution (higher resolution is better for presentations). Fill out the **Name** and click **Save.**

HD   4K   8K   ✓ Analyze   →

Click analyze and get a VAA heatmap report emailed to you.

Step 3 – The image will be downloaded directly to your computer. Note: Your screenshot will automatically be saved to your Media Collection.
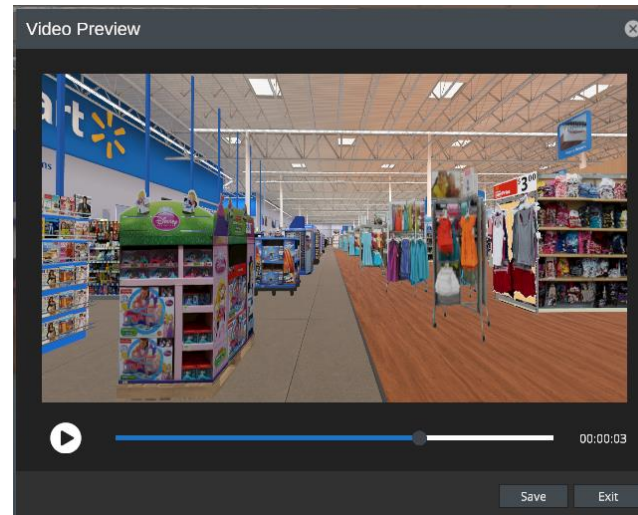
How to create a Video

Step 1 – Click **Actions** then on the [▶ Video] button on the top right of your screen.

Step 2 – When ready, click on the **Record** button. You can film up to 2 minutes of video footage at a time.

[⦿ RECORD   00:00:00   360]

Step 3 – Click **Stop** when complete. You can **Play** back the video, **Save** it or create a **New Video**. Note: Your video will automatically be saved to your Media Collection.
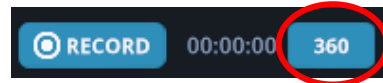
How to create a <u>Display Quick Video</u>

Step 1 – Click on the Display or other object in the store. Make sure the object is unlocked.

Step 2 - Click Actions then on the [▶ Video] button on the top right of your screen.

Step 3 – Adjust camera angle and zoom to where you want the video to be taken.

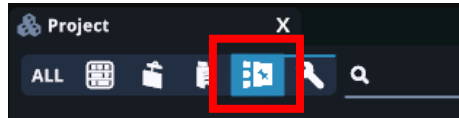**Step 4** – Select 360 [⊙ RECORD   00:00:00   360]

ShopperMX will take a 360 degree video of the display you've chosen, save when completed.
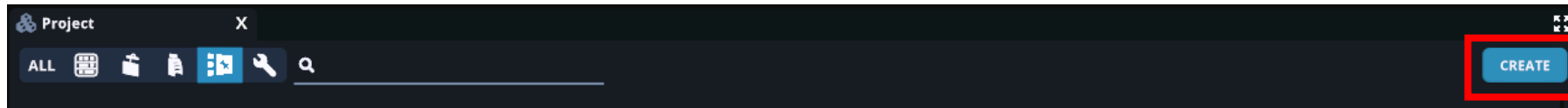
Tip: !
Quick videos work well for multi-sided displays (no end caps).
Place your display with enough room to rotate full 360 degrees

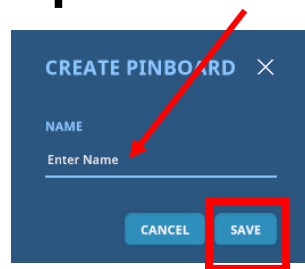InContext

How to Create a **Pinboard**

- **Step 1 –** Under Projects Panel in the Store Concept, click on the Pinboard's icon.

- **Step 2 -** Click 'Create'.

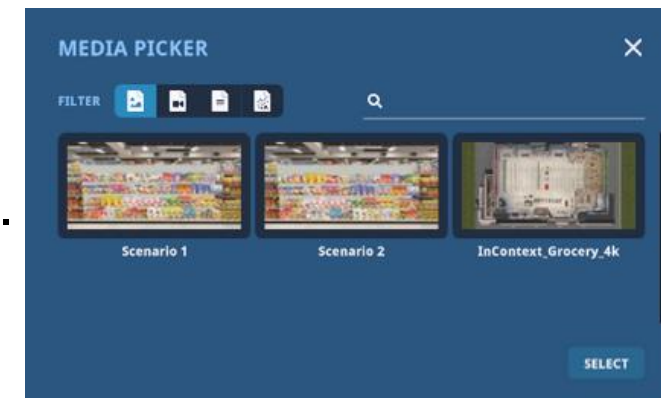- **Step 3 –** Name your Pinboard then click Save.

- **Step 4 –** Select the media you would like to include in the pinboard.
  - Note: You don't have to select an item to create the pinboard. Just click on the X to create the pinboard without selecting a media.
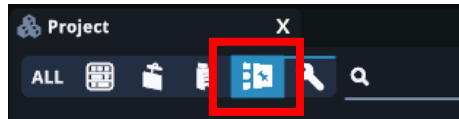 - All media comes from your Media Collection under your project on ShopperMX.com
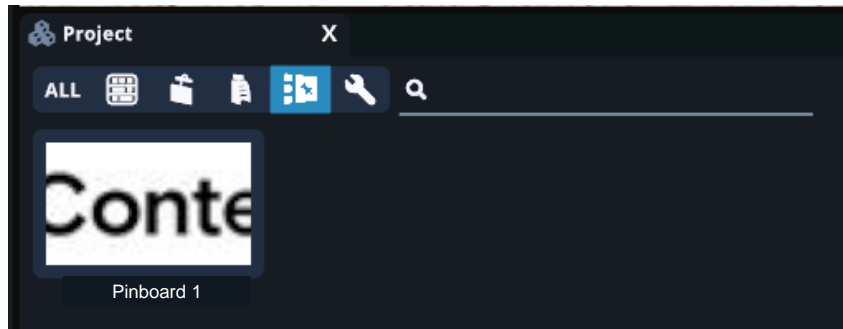
InContext

How to Place a **<u>Pinboard to Store</u>**

- **Step 1 –** Under Projects in the Store Concept, click on the Pinboard's icon.
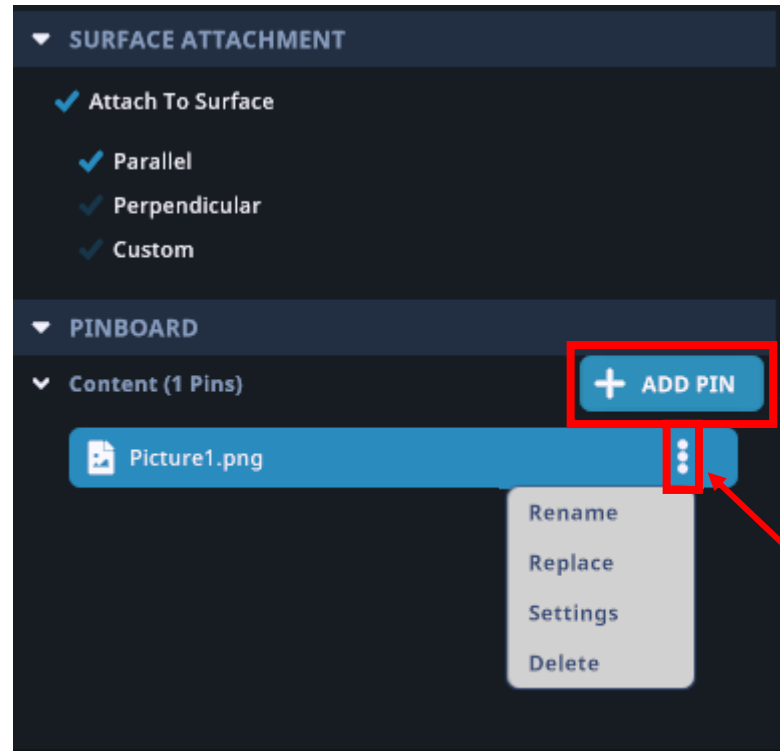

- **Step 2 –** Click and hold down on the Pinboard you wish to place and drag it into the store.

How to Adjust a __Pinboard Settings__ under Properties Panel

Surface Attachment

- Adjust the way the pinboard attaches to a surface. (Can always use the movement or rotation gizmos to adjust pinboard once placed in store)

Pinboard

- **Add Pin** – add additional media to create a new pin to an already existing pinboard.

- **Pin Setting** – Rename, Replace with different media, Sizing Settings, and Delete

Store Best Practices

- Only one person can make changes to a store at a time.

- Save often! (SMX doesn't auto-save).

- If your POG does not fit in your aisle, lengthen the aisle.

- Take advantage of visibility – hide and unhide objects versus deleting.

- When you copy a store into a new project, ALL the assets in that store get copied into the new project as well (POGs, Signs, displays etc….)

Lesson Four Summary

In this lesson we learned...

- Opening a new store

- Designing store layouts (Macro-Space Planning)

- Creating Screenshots and Videos

⭐ ***Let's try it out...***

  - Place your planogram, sign, and avatar in store
  - Showcase your concept through a picture or a video

Congratulations on completing ShopperMX Training!

THANK YOU!

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ShopperMX Support Recourses

- ***Need a refresher or have a specific question on SMX functionality?***

  Check out ShopperMX Support for a library of help content and articles. Can also click the Support button on home screen

- ***Still having trouble?***

  Click the Support button at the bottom of the ShopperMX Support page and someone from the Customer Experience team will help you out!