

VinNOW/Nexternal Integration Setup Guide

Summary

Setting up the Nexternal/VinNOW integration includes the following steps:

- 1) Security and Connection Setup
- 2) Product Key Setup
- 3) Wine Club Setup
- 4) Setup Wine Clubs Represented as Products
- 5) Setup Automated Customer E-Mail
- 6) Setup Custom Fields
- 7) Perform Product Sync from VinNOW
- 8) Perform Customer and Order Sync from VinNOW

Security and Connection Setup

This step makes it possible for the VinNOW application to connect with the Nexternal system.

- 1) Login to the Nexternal OMS and navigate to Settings \ Compatible Software \ Alcoholic Beverage Tools \ VinNOW.

The screenshot shows a web form titled "Alcoholic Beverage Tools Preferences". It is organized into three sections:

- IDology:** Includes fields for "User Name" (containing "testuser"), "Password", and "Re-type to confirm".
- ShipCompliant:** Includes fields for "E-Mail Address" (containing "test.user@winery.com"), "Password", and "Re-type to confirm".
- VinNOW:** Includes fields for "E-Mail Address" (containing "test.user@winery.com"), "Password", and "Re-type to confirm". This entire section is circled in red.

- 2) Enter a valid e-mail address and password that the VinNOW application can use to access your Nexternal account. This does not need to be the same e-mail address and password used to login to the Nexternal OMS.
- 3) Re-type the password to confirm.
- 4) Click Finish to save.
- 5) Navigate to Settings \ Compatible Software \ Alcoholic Beverage Tools \ Preferences \ VinNOW.
- 6) Copy or take note of the Web Service URL and the Web Service Namespace. This will need to be entered into VinNOW.

VinNOW
Web Service URL: https://www.nexternal.com/winery/vinnow/VNService.svc?WSDL
Web Service Namespace: https://nexternal.com

- 7) Launch the VinNOW application and navigate to Setup \ System Options \ System Option Settings and click on the “Integrated Web Shopping Cart” tab.
- 8) Enter the Activation Key given to you by VinNOW.
- 9) Enter the Web Service URL and Namespace from the previous step into the Web Service URL and WS Namespace fields.
- 10) For the User ID and Password fields enter the same e-mail and password that you previously entered into Nexternal.
- 11) VinNOW suggests creating a Sales ID of “Web” in order to give you additional reporting options for orders placed on in the Nexternal shopping cart.
- 12) Click OK to save the login and connection information.

Product Key Setup

In order to synchronize products that already exist in the Nexternal Order Management System, you must first match the VinNOW Product IDs with their corresponding Nexternal product’s Product Key. If a product in VinNOW does not match a Nexternal product on Product Key, SKU or the Product ID then it will be considered a new product. For products that are new to the Nexternal system, this section can be skipped.

For each product that already exists in Nexternal, do the following:

- 1) Navigate the Product Maintenance page in VinNOW for the product in question (Setup \ VinNOW Files \ Products \ Select the product).
- 2) Navigate to the same product in the Nexternal Order Management System (From the Products list select the product link).
- 3) If the product in Nexternal has multiple SKUs associated with it define the Product Key on the SKU level:
 - a. Navigate to the SKUs section and click Edit.

- b. For each SKU in the VinNOW Key field, enter the Product ID from VinNOW that represents that product variation.

SKU #1	
Color:	Berry
Size:	Small
	<input checked="" type="checkbox"/> Available
	<input checked="" type="checkbox"/> Default
SKU:	<input type="text"/>
VinNOW Key:	<input type="text" value="Shirt123"/>

- c. Click Finish.
- 4) If the product does not have multiple SKUs enter the Product Key on the product level in Product Overrides:
- a. Navigate to Product Overrides and click Edit.
 - b. For the VinNOW Product Key, enter the Product ID from the VinNOW application. If the product in the VinNOW application also has a Brand Key you may also use that as an identifier by entering it in the VinNOW Brand Key field.

Edit Overrides: 2008 Sofia Rosé testing & test			
Product Overrides			
QuickBooks Sales Account: <small>(optional)</small>	<input type="text"/>	ShipCompliant Brand Key: <small>(optional)</small>	<input type="text" value="SC-WIN"/>
ShipCompliant Product Key: <small>(optional)</small>	<input type="text" value="SC-SP"/>	VinNOW Brand Key: <small>(optional)</small>	<input type="text" value="Sofia"/>
VinNOW Product Key: <small>(optional)</small>	<input type="text" value="Rose2008"/>		

- c. Click Finish.

To sync products that do not yet exist in VinNOW but do exist in Nexternal you may do the following:

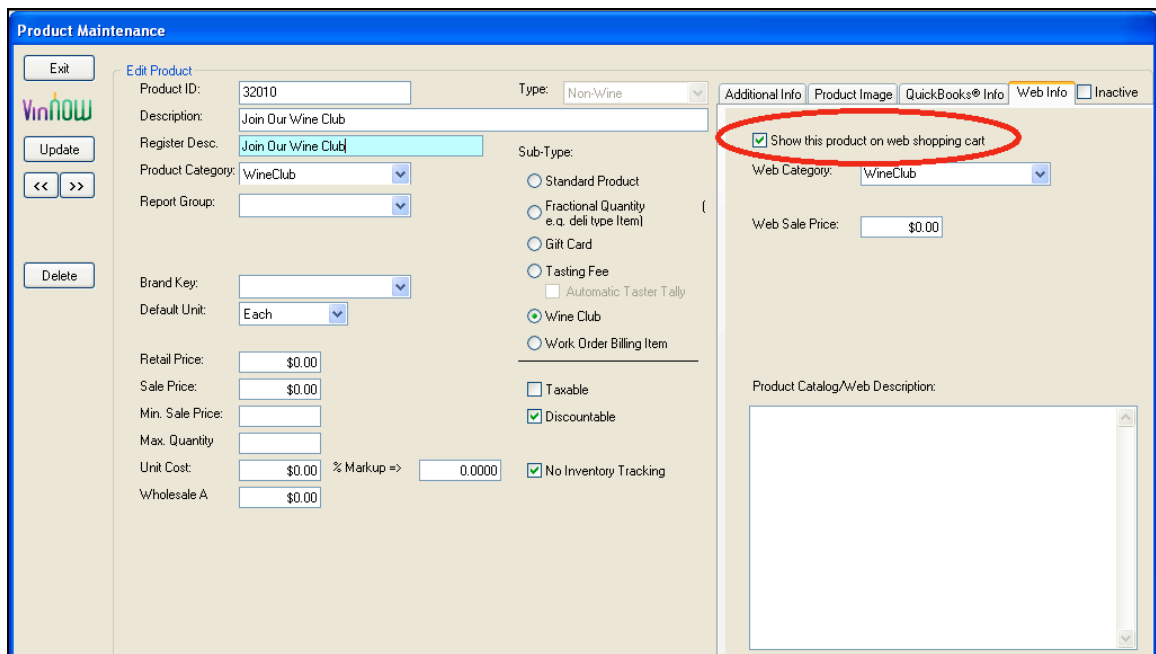
- 1) Launch the Product Maintenance page in VinNOW to create the new product (Setup \ VinNOW Files \ Products \ New).
- 2) When the Product Maintenance page opens, you will see a Product ID generated by VinNOW. Enter this ID as the Product Key in Nexternal as described above.
- 3) Finish entering the desired product fields on the Product Maintenance page and follow the instructions in the Perform "Product Sync from VinNOW" section below to complete the first Product Import.

Wine Club Setup

Wine Clubs are treated as Customer Types in the Nexternal system. Wine Clubs can also be synchronized between the VinNOW application and the Nexternal system.

For each Wine Club do the following:

- 1) From within VinNOW pull up the Product Maintenance page for the wine club and copy or take note of the Product ID.
- 2) Select the Web Info tab on the far right side of the page and select the “Show this product on web shopping cart.”



The screenshot shows the 'Product Maintenance' interface. On the right side, there are several tabs: 'Additional Info', 'Product Image', 'QuickBooks® Info', 'Web Info', and 'Inactive'. The 'Web Info' tab is active. Within this tab, the checkbox 'Show this product on web shopping cart' is checked and highlighted with a red circle. Below this checkbox, the 'Web Category' is set to 'WineClub' and the 'Web Sale Price' is '\$0.00'. The main form area shows 'Product ID: 32010', 'Description: Join Our Wine Club', and 'Product Category: WineClub'. The 'Sub-Type' section has 'Wine Club' selected with a radio button. Other options like 'Standard Product', 'Fractional Quantity', 'Gift Card', 'Tasting Fee', and 'Work Order Billing Item' are unselected. There are also checkboxes for 'Taxable' (unchecked), 'Discountable' (checked), and 'No Inventory Tracking' (checked).

- 3) Make sure the Sub-Type of the product is set to Wine Club.
- 4) If the customer type already exists in Nexternal do the following in the Nexternal Order Management System (If the customer type does not already exist in Nexternal, you may skip this step as the sync will add the customer type):
 - a. Navigate to the Customer Type in the Nexternal Order Management System (Customers \ Types \ Click Next button)
 - b. Edit the VinNOW Key field to match the VinNOW Product ID from step 1.
 - c. Click Finish.
- 5) In VinNOW on the Product Maintenance page for the wine club, click Update and OK to perform a sync.

Setup Wine Clubs Represented as Products

Many wineries have a product in their store that represents the wine club. In this scenario, the customer could add the product to their cart in order to initiate their membership into the wine club. If you have a product that is setup this way, please do the following in order to have it represented during an Order Sync:

Please ensure that you have properly gone through the Wine Club Setup listed above.

- 1) In VinNOW navigate the Product Maintenance page for the wine club just as you did in the Wine Club Setup section.

The screenshot shows the 'Product Maintenance' interface. The 'Product ID' field is highlighted with a red circle and contains the value '32010'. Other visible fields include 'Type: Non-Wine', 'Register Desc: Join Our Wine Club', 'Product Category: WineClub', 'Sub-Type: Wine Club', 'Web Sale Price: \$0.00', and 'Discountable' checked.

- 2) Copy or take note of the Product ID.
- 3) In the Nexternal Order Management System navigate to the Nexternal product that represents the wine club membership.
- 4) Navigate to the Product Overrides section and click the Edit button just as you did in the Product Key Setup section above.
- 5) For the VinNOW Product Key field enter the Product ID from VinNOW that you previously took note of.

The screenshot shows the 'Product Overrides' section. The 'VinNOW Product Key' field is circled in red and contains the value '32010'. Other fields include 'QuickBooks Sales Account', 'ShipCompliant Product Key', 'Alcohol Designation: (use default)', and 'Expected Shipping Days'.

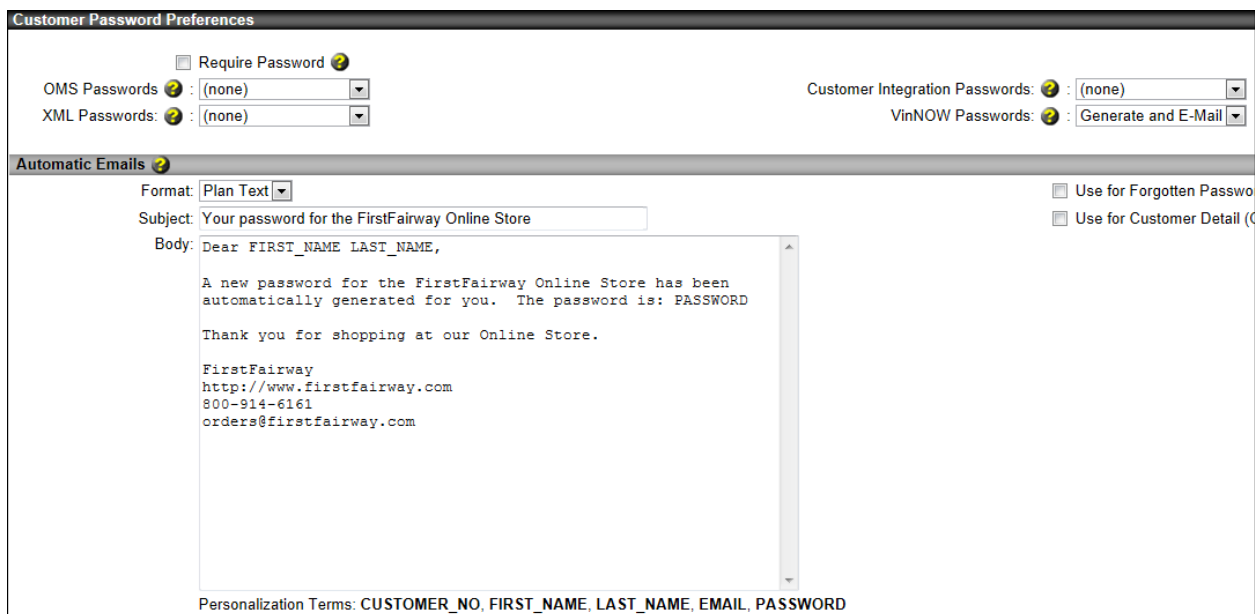
- 6) Click Finish.

Setup Automated Customer E-Mail

When a new customer is added to the Nexternal system from VinNOW, a password is automatically generated for that customer. You can optionally setup an automated e-mail to be sent out to the newly added customer as well.

This feature is only recommended when importing recent customers. During the first large import of new customers into the Nexternal system this feature should be disabled.

- 1) From within the Nexternal Order Management System, navigate to Customers/Password Preferences.



The screenshot shows the 'Customer Password Preferences' and 'Automatic Emails' configuration interface. The 'Customer Password Preferences' section includes a 'Require Password' checkbox, dropdown menus for 'OMS Passwords', 'XML Passwords', 'Customer Integration Passwords', and 'VinNOW Passwords'. The 'Automatic Emails' section includes a 'Format' dropdown set to 'Plain Text', a 'Subject' field with the text 'Your password for the FirstFairway Online Store', and a 'Body' text area containing a pre-formatted email message. The email body includes a greeting, a password notification, a thank you message, and contact information for FirstFairway. Personalization terms are listed at the bottom as CUSTOMER_NO, FIRST_NAME, LAST_NAME, EMAIL, and PASSWORD.

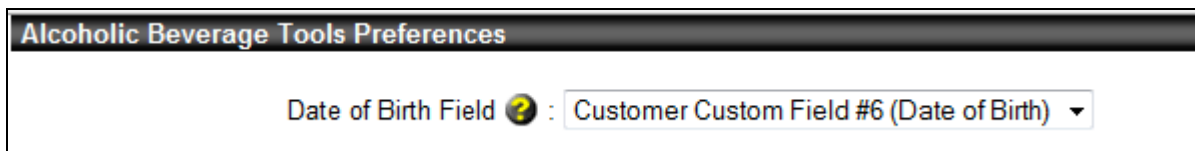
- 2) Set the VinNOW Passwords field to “Generate and E-Mail” to enable the automated e-mail feature.
- 3) For the Message Format dropdown box you may select either Plain Text or HTML.
- 4) For the Subject and Body fields you may use personalization terms (e.g. CUSTOMER_NO, FIRST_NAME, LAST_NAME, EMAIL, and PASSWORD) which will be replaced with the customer’s information at the time the e-mail is sent.
- 5) Click Finish to save your changes.

Setup Custom Fields


In the Nexternal Shopping Cart, Custom Fields allow you to synchronize certain fields like the customer’s date of birth and the product’s vintage, wine type and varietal with the VinNOW application.

If you do not need to synchronize date of birth, vintage, wine type or varietal you may skip this section.

- 1) To create the custom fields for all products navigate to Products \ Custom Fields in the Nexternal Order Management System and enter the Field Name (e.g. Vintage, Wine Type or Varietal), the Field Type and whether or not it is a required field. The Vintage Field should have the Field Type set to Positive Integer while Wine Type and Varietal should be set to Text.
- 2) Click Finish to save changes.
- 3) To create the custom field for the customer date of birth navigate to Customers \ Custom Fields and enter a Field Name (e.g. Date of Birth) and set the Field Type to Date.
- 4) To associate these custom fields with their corresponding fields in VinNOW, navigate to Settings \ Compatible Software \ Alcoholic Beverage Tools \ Preferences.
- 5) At the top of the page you will see dropdown list next to Date of Birth. Select the Customer Custom Field that you wish to associate with the Date of Birth in the integration.




Alcoholic Beverage Tools Preferences

Date of Birth Field  : Customer Custom Field #6 (Date of Birth) ▼

- 6) While still on the Alcoholic Beverage Tools Preferences page scroll down to the VinNOW section and for Vintage Field, Wine Type Field and Varietal Field select the Product Custom Field that you wish to associate with the Vintage, Wine Type and Varietal in the integration.



VinNOW

Web Service URL  : <https://dev.nexternal.com/netxml/fairway/VNService.svc?WSDL>

Web Service Namespace  : <https://nexternal.com>

Vintage Field  : Product Custom Field #6 (Vintage) ▼

Wine Type Field  : Product Custom Field #1 (Brand) ▼

Varietal Field  : (do not use) ▼

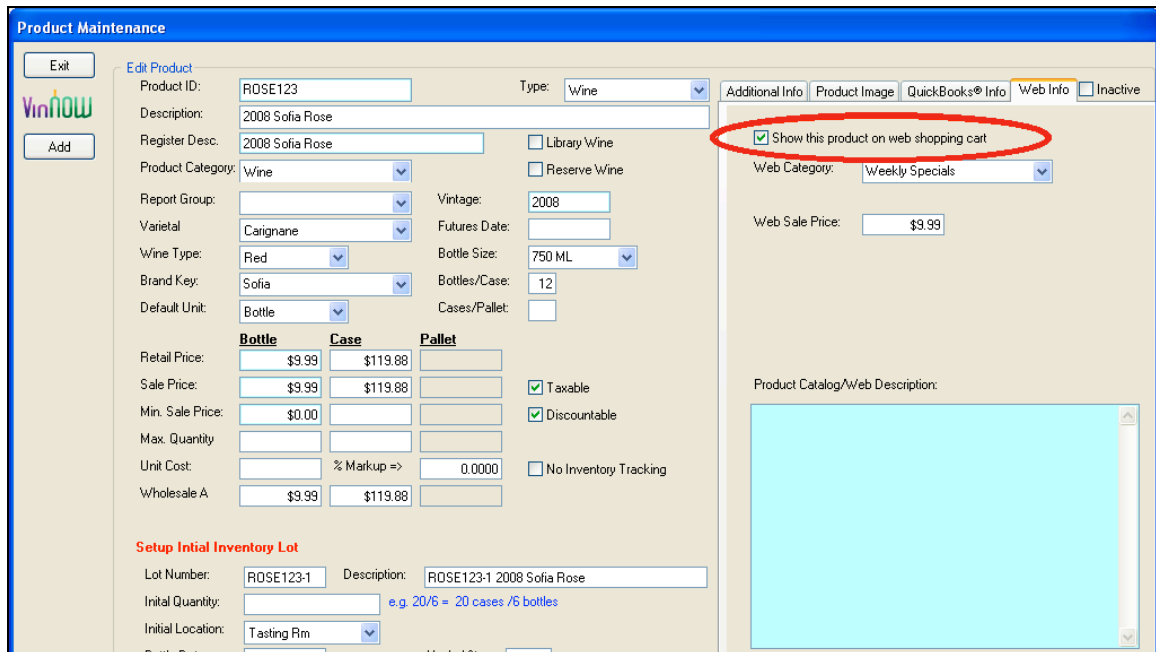
- 7) Click Submit to save changes.

Perform Product Sync from VinNOW

After setting up Product Keys in the previous section you can perform a Product Sync in order to synchronize product data.

- 1) During the first sync we recommend the following:
 - a. Perform a backup of the VinNOW database (from VinNOW navigate to File \ Backup VinNOW Database).

- b. Disable the Automated Customer Email feature shown in the previous section (Settings \ Compatible Software \ Alcoholic Beverage Tools \ Preferences \ VinNOW \ Uncheck “Enable New Customer E-Mails”).
 - c. From within the VinNOW application disable the “Upload All Customers” option to limit the amount of old customers imported into the Nexternal system (Setup \ System Options \ System Option Settings \ Integrated Web Shopping Cart \ Uncheck “Upload All Customers”)
- 2) From within VinNOW, navigate to the Product Maintenance page for the product in question (Setup \ VinNOW Files \ Products \ Perform a product search for the product \ Double click on the product).
 - 3) Edit any desired product information like Price or Description.
 - 4) Select the Web Info tab on the far right of the page and check the “Show this product on web shopping cart” checkbox.



Product Maintenance

Exit Add

Edit Product

Product ID: ROSE123 Type: Wine

Description: 2008 Sofia Rose

Register Desc: 2008 Sofia Rose

Product Category: Wine

Report Group: Varietal: Carignane

Wine Type: Red

Brand Key: Sofia

Default Unit: Bottle

Vintage: 2008

Futures Date:

Bottle Size: 750 ML

Bottles/Case: 12

Cases/Pallet:

Library Wine

Reserve Wine

Additional Info Product Image QuickBooks® Info **Web Info** Inactive

Show this product on web shopping cart

Web Category: Weekly Specials

Web Sale Price: \$9.99

	Bottle	Case	Pallet
Retail Price:	\$9.99	\$119.88	
Sale Price:	\$9.99	\$119.88	
Min. Sale Price:	\$0.00		
Max. Quantity:			
Unit Cost:		% Markup =>	0.0000
Wholesale A:	\$9.99	\$119.88	

Taxable

Discountable

No Inventory Tracking

Setup Initial Inventory Lot

Lot Number: ROSE123-1 Description: ROSE123-1 2008 Sofia Rose

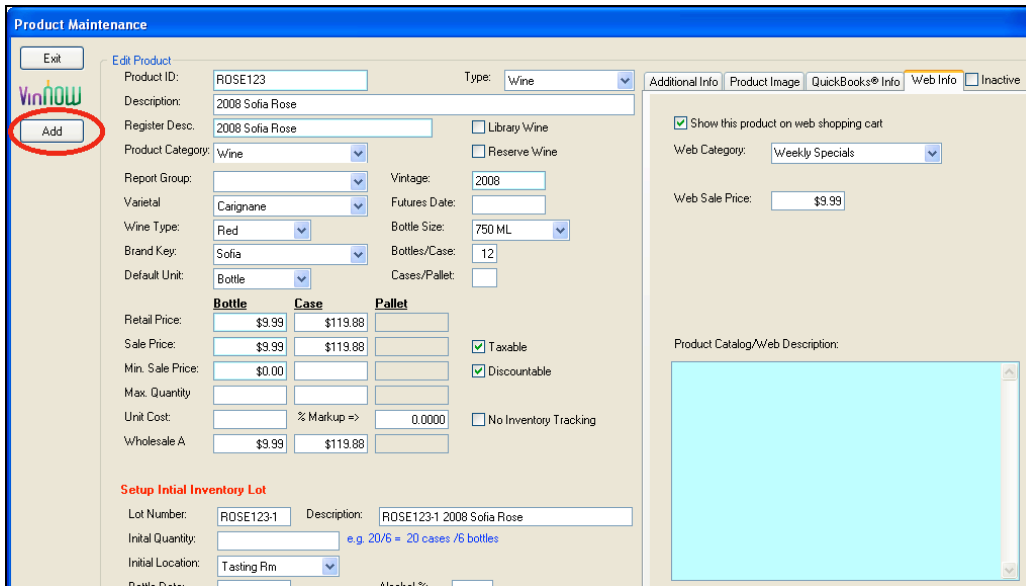
Initial Quantity: e.g. 20/6 = 20 cases /6 bottles

Initial Location: Tasting Rm

Product Catalog/Web Description:

- 5) For the Web Category field, enter the name of the category that you wish to contain the product in the Nexternal system. This category must already exist in Nexternal and must not be the parent category to any subcategory.

6) Click Add/Update and then OK to upload the product into the Nexternal system.

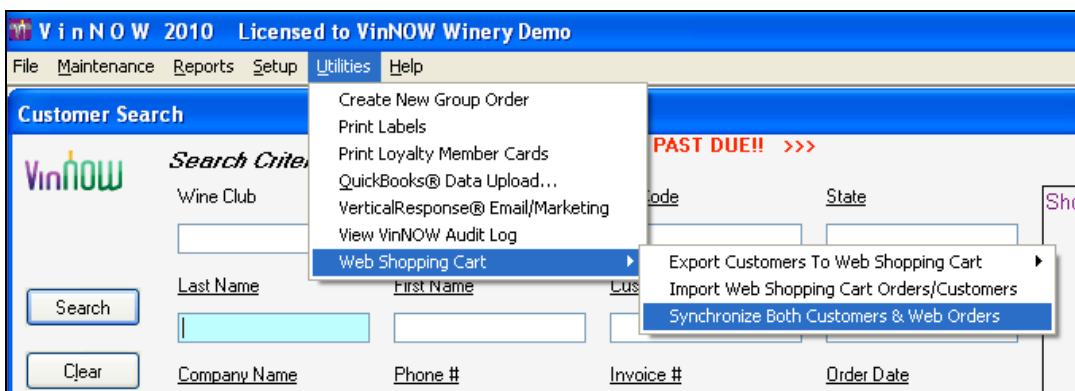


7) If this product is new to Nexternal, you should now login to the Nexternal Order Management System and edit the product information that is web-specific, such as the product image. Please note that every time you update the product in VinNOW, if the “Show this product on web shopping cart” option is checked the Product Import feature will import the changes into the Nexternal system.

Perform Customer and Order Sync from VinNOW

This command will synchronize the customer information between the VinNOW application and the Nexternal system. This should be done after all of the products have been synchronized in order to avoid errors.

1) From within VinNOW navigate to Utilities \ Web Shopping Cart \ Synchronize Both Customers & Web Orders



2) You will be asked to confirm the synchronization. Select OK. Done!