



How to set up Pickup Options in the Nexternal Platform

Setting up some or all of your products as available for pickup at one or more locations is simple in the Nexternal Order Management System (“OMS”). First, you’ll set up your pickup locations, set days and hours and enter any relevant messaging for your customers. Then, you’ll designate which products can be picked up at which locations, which can only be shipped, and which can be picked up but not shipped.

1. Set up your pickup location(s) (Settings/Pickup Locations)

Read the ? tooltips to help you understand each field. Don’t forget to check the available pickup days, enter hours for pick up, and any helpful comments you may wish to provide.

A screenshot of the "Settings/Pickup Locations" page in the Nexternal platform, specifically for "(Existing) Pickup Location #1". The form contains the following fields and options:

- Copy Information of Ship From:** A dropdown menu with a downward arrow.
- Full Name ? :** Text input field containing "Surfside Cellars".
- Internal Name ? :** Text input field containing "Winery".
- Customer-Facing Name ? :** Text input field containing "Tasting Room".
- Address Line 1:** Text input field containing "560 Carlsbad Village Dr. Ste 204".
- Address Line 2:** Text input field containing "(optional)".
- City:** Text input field containing "Carlsbad".
- State/Province:** Dropdown menu with "California" selected.
- Zip/Postal Code:** Text input field containing "92008".
- Country:** Dropdown menu with "United States" selected.
- Phone Number ? (optional):** Text input field containing "800-914-6161".
- Phone Ext ? (optional):** Text input field containing "(optional)".
- Contact First Name ? (optional):** Text input field containing "Stanley".
- Contact Last Name ? (optional):** Text input field containing "Kahuna".
- Contact E-Mail ? (optional):** Text input field containing "orders@surfsidecellars.com".
- Available Pickup Days ? :** A row of checkboxes for days of the week: Monday (unchecked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (checked), Saturday (checked), and Sunday (checked).
- Hours ? (optional):** Text input field containing "Hours of Operation: 8:00 AM - 5:00 PM PST" and "Sun 12pm-4pm".
- Comment ? (optional):** Text input field containing "Please call ahead to ensure your order is ready when you arrive!" and "800-914-6161".
- Delete Address:** A checkbox at the bottom of the form.

2. Set which products are available for pickup

Once your pickup locations are set up, navigate to a product in your OMS that you’d like to make available for pickup, click the pencil to edit the product, and look for the fifth item down on the first page, called “Pickup Locations”. Check the box next to all locations from which that

product can be picked up, and check “Pickup Only” ONLY if the product MUST be picked up and cannot be shipped. Otherwise, leave “Pickup Only” unchecked.

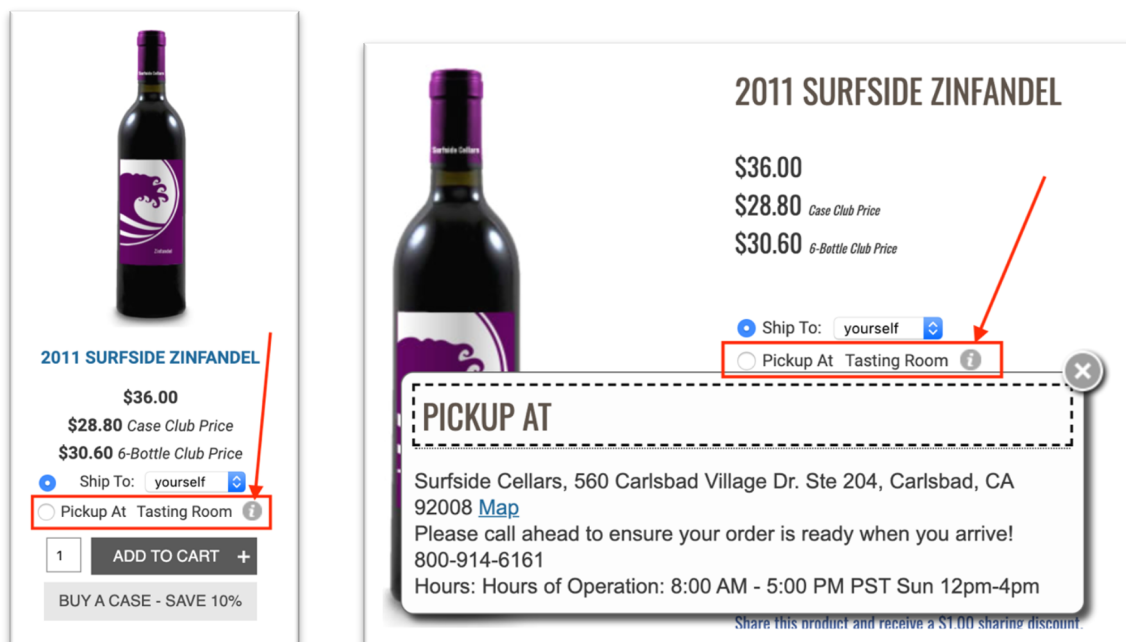
Pickup Locations  : ☒ Tasting Room Napa ☐ Tasting Room SF ☐ Pickup Only

You may do this on each product individually, or you may use a product import spreadsheet to update your products in bulk.

We recommend that if there is any variation among products as to how they will be handled for pickup (meaning, pick up at a different combination of locations, or some pickup only and some not), that you manually modify one of each variation, then export your active products and update the others using the exact pickup values that you see in the spreadsheet export for the products that you manually updated.

3. Check your work!!!

Your work in the OMS is never done until you check it in your online store, to ensure that things look right and say what you meant, to ensure you’ve created a positive shopping experience, and to understand how the store works so that you are prepared to answer any customer questions that may arise. Pickup in your online store will look something like this on the product list and product detail pages:



Note when someone clicks on the circle “i”, the address, hours, and notes that you typed into the pickup address fields of the OMS, will show up to your customer. Make sure it’s easy to read and understand!