Microworks Integration Set up Requirements for the Nexternal Platform

1. All Products need to be set up in both Microworks and Nexternal. The client must add the Microworks ItemNo into the Nexternal SKU field. If not, orders will not flow into Microworks. (remember that in Nexternal, club signups are products, so they need SKU's too)

2. Ensure that the Customer Types in Nexternal EXACTLY MATCH Subscriptions in Microworks. *This is critical.* One caveat to this – for club types - if you have both ship and pickup clubs, use suffixes "-SH" in Nexternal for wine clubs that ship, and "-PU" in Nexternal for wine clubs that pick up orders. (but do not use those suffixes in Microworks.) – Please also note that there is a 20-character limit that must be observed, including the suffixes. Do not delete any customer types you have created in Nexternal (such as Consumer) unless explicitly instructed to do so by your Account Manager.

   For example:

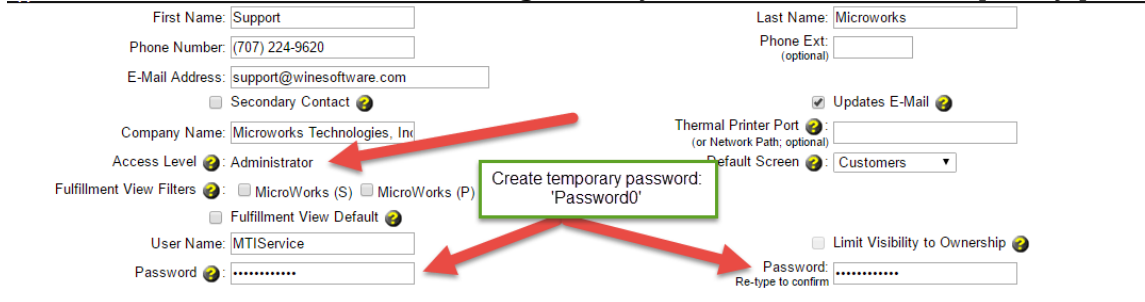 | Nexternal Customer Type | Microworks Subscription |
   |---|---|
   | Consumer | Gold Club |
   | Gold Club-PU | Silver Club |
   | Gold Club-SH | |
   | Silver Club-PU | |
   | Silver Club-SH | |

   PLEASE NOTE that multiple functions in Nexternal are triggered by customer type. So, for example, if you are already using Nexternal and are now adding Microworks, and you already have a customer list in Nexternal with assigned customer types, or if you have customer-type discounts or visibility by customer type set up on products, these can be affected by the manipulation of customer types above. If this is the case, please consult with your Nexternal account manager to ensure that you don't accidentally "break" pricing or visibility set up when you manipulate the customer types to accommodate the Microworks integration.

3. In Nexternal - Customers > Customer Types > Next:

   a) Select club for all appropriate customer types. (Check box in club column.)

   b) Select "Business Required" for all company field values.

4. In Nexternal - Customers > Preferences > Customer Custom Fields. Set up Custom field 1 up as "Date of Birth", make "date" the field type, and we recommend making this field required, for compliance purposes. Select "Expose to customers" and "Use to Identify". De-select all "Field is required" options on custom fields 2 through 6 (so that none of the custom fields 2-6 are required – they must all be optional).

5. In Nexternal - Settings > Edit Site Options > Time Adjustment. Make sure this matches the time zone for the client's computer where Microworks is being used.

6. In Nexternal - Settings > Edit Site Options > Multiple Ship. Deselect Multiple Ship To – this feature is not available for use with this integration.

7. Ensure that your account manager has selected "Full CC Access - Select Report/XML" in the Nexternal billing system for your account. To verify in your OMS, go to Settings > Edit Site Options, scroll to Full CC Access. (you will see that box checked, but grayed out, if it has been done – if not, contact your Nexternal Account Manager)

8. In Nexternal - Settings > Edit Boolean Options:

   a) Select "Allow Saved CC"

   b) Select "Prevent Duplicate E-mail"

   c) Select "Upgrade Autosave CC"

   d) If you will be doing all of your fulfillment through Microworks, then deselect "Shipped Email". Do this immediately before the sync, but not sooner (or later).

9. In Nexternal - Settings > XML Tools. Select "Accept XML Tools Memorandum of Understanding". Next, be sure to ask your Account Manager to mark your account "Approved for XML Tools" , and to turn off the XML limiter for your account. (he/she will do this in the Nexternal billing system).

10. In Nexternal - Settings > Compatible Software. Select either UPS Address Validation or Fed Ex Address Validation if you have one of those integrated into Nexternal. This is not required but it is highly recommended for all Nexternal users. NOTE: on the day that Microworks does the initial sync – TURN OFF address validation – then turn it back on after the initial Microworks sync.

11. Ensure you have a payment gateway integrated into Nexternal (in Settings – Compatible Software > Payment Gateways) as all payments will be charged in Nexternal before orders pass into Microworks.

12. In Nexternal – Settings > Billing Options, ensure that the box for "Do not require payment for zero-dollar products when Order Total is $0.00" is NOT checked.

13. *Skip this #13 if you are new to Nexternal and do not have any customers in your Nexternal OMS database.* In Nexternal - Customers > Cleanup > Merge on matching Email Addresses. (Goal is that a single email address can be used only on a single customer record – no duplicate emails on customer records.)

14. Set up a User record for Microworks in your Order Management System. Log into your OMS, and go to Users and add a new Administrator level user, with the appropriate UserID/Password as indicated below. Once Microworks logs in, they will customize this temporary password.

15. When hooked up initially and on an ongoing basis, all Microworks customers will flow into Nexternal, regardless of whether they are club members. Winery must decide whether, when the initial hook up happens, they want to send ALL customers an email with a password to Nexternal, or whether they want to send that email with password only to Club Members. Also you need to decide if that emails, regardless of recipients, will be sent from Nexternal on initial hookup, or from a 3rd-party email system such as Mail Chimp. Sending to all through Nexternal is the simplest way to do it. Any other choice involves some manual manipulation. Ongoing password emails will be sent from Nexternal.

If you want to send to all through Nexternal on initial set up– then in Nexternal - Customers > Preferences > Password Preferences > Set OMS Passwords & XML passwords to "Generate and E-Mail".

If you want to send only to club members through Nexternal on initial set up – then in Nexternal - Customers > Preferences > Password Preferences > Set OMS Passwords & XML passwords to "Generate" or "none" (discuss this with your account manager)

If you want to send to club only or all through 3rd party email system on initial set up - then in Nexternal - Customers > Preferences > Password Preferences > Set OMS Passwords & XML passwords to "Generate" or "none" (discuss this with your account manager)

16. SHIP COMPLIANT

If you are **a new client planning to use ShipCompliant, and are planning to fulfill (ship) eCommerce orders in Nexternal and Microworks orders in Microworks,** please see the ShipCompliant setup guide and talk to your account manager about settings if you need further help. Let Keith know you will be fulfilling in Nexternal, and you want the orders' shipped status to come into Microworks (to avoid double fulfilling).

If you are an **existing client using ShipCompliant, and are currently fulfilling your eCommerce orders in Nexternal, and you plan to continue doing so** when the Microworks integration is active, you do not need to change your ShipCompliant settings. Let Keith know you will be fulfilling in Nexternal, and you want the orders' shipped status to come into Microworks (to avoid double fulfilling).

If you are **a new or existing client planning to fulfill eCommerce and Microworks orders in Microworks,** you must ensure that the Nexternal settings are not set to commit, and auto-sync is OFF.   You will want to work with Microworks to time shutting these things off so that you do it immediately before they hook you up. (to avoid a period of time when you are not committing orders and you are not hooked up to Microworks.)

17. Verify with your Nexternal Account Manager that you have completed every step above, and that you have no additional questions.

18. After the initial Microworks/Nexternal sync, navigate to Nexternal - Customers > Preferences > Password Preferences. Confirm that the content of the email is to your liking, as this will be the password email sent to customers that flow to Nexternal from Microworks on an ongoing basis, regardless of how you choose to send the email on the initial sync.