Sovos ShipCompliant/Nexternal Integration Setup Guide

1. Log in to your Nexternal Order Management System ("OMS") in one browser tab and your Sovos ShipCompliant window in a different tab.

2. Before you connect the two systems, make sure that all products that exist in Nexternal also exist in ShipCompliant. This includes both alcoholic and non-alcoholic products. For non-alcoholic products such as an online wine club sign-up, event tickets, merchandise, etc., make sure the Product Type in ShipCompliant is set as General Merchandise or General Non-Taxable depending on the type of product.

3. ShipCompliant and Nexternal Product Keys and Brand Keys must match. For most merchants, no action is required as the defaults will suffice. However, for merchants with multiple brands, or who sell merchandise for alcohol products shipping from other merchants, you will need, for each alcoholic product, to ensure that the ShipCompliant Product Key and ShipCompliant Brand Key match the values found in Nexternal (these fields are found on Edit Product Screen 2 in the Product Overrides section).

Note: A default ShipCompliant Brand Key will be set up in a later step so it is acceptable to leave it blank, just realize it will use the default value if no other value is specified. If you do not specify a ShipCompliant Product Key, Nexternal will first attempt to use the SKU. If the SKU isn't defined for a product, Nexternal will pass the Nexternal-generated Product Number to ShipCompliant. Therefore, if the Nexternal SKU field is equal to the value of the ShipCompliant Product Key, you can leave this field blank.

4. In Sovos ShipCompliant, create a new user of type "Web Service User". You will need the Web Service User information for step #5 below.

5. In the Nexternal OMS, visit Settings/Edit Compatible Software. Enter the login credentials for the ShipCompliant Web Service User (the one you created in ShipCompliant in step #4 above) in the corresponding fields and click Finish.

6. In the Nexternal OMS Visit Settings/Edit Compatible Software/Alcoholic Beverage Tools/ Preferences Link/ShipCompliant, set your preferences, and then save them by clicking Submit.

ShipCompliant

Sales Order Key Prefix ⑦ : [____] (optional)	Brand Key ⑦ : [_____] (optional)
Commit Option ⑦ : [All ▾]	Override Option ⑦ : [Never Override ▾]
Address Matching Criteria ⑦ : [Name ▾]	☐ Use Price in Product Matching Criteria ⑦
Canceled Criteria ⑦ :	Status Mappings ⑦ :

Status Criterion

☐ Return-Ship Agent (Order Status)
☐ Return-Customer (Order Status)
☐ Refunded (Billing Status)
☐ Refunded-Partial (Billing Status)
☐ Declined (Billing Status)
☐ Canceled (Billing Status)

Billing Status Group	SC Shipment Status
Unbilled	[In Process ▾]
Authorized	[Payment Accepted ▾]
Paid	[Payment Accepted ▾]

Fulfillment Houses ⑦ :

Ship From	Fulfillment House	Fulfillment Account
FirstFairway	[(none) ▾]	[____]

☑ Include Customer Comments ⑦

☑ Display Compliance Next to Order ⑦

☑ AutoSync Shipping Daily ⑦ View Log

☑ Apply Order Level Discounts to Line Items ⑦

☐ Ignore Invalid Addresses ⑦

When no DOB is present ⑦ : [Use Default Date ▾]

Tags ⑦ : [Nexternal____] (optional)

In Person Placed By ⑦ : [____] (optional)

Register ID ⑦ : [____] (optional)

AutoSync Start Date ⑦ : [10/03/202] 📅 (mm/dd/yyy - optional)

Web Service Domain ⑦ : ⦿ Use Default
○ [____]

Surcharge Product Key ⑦ : [____] (optional)

Gratuity Product Key ⑦ : [____] (optional)

Preferences Setup Tips:

- The settings above while common, will not work for every merchant. Please ensure your settings are right for your business. If you have questions about a configuration parameter, please click the "?" icon for more information.

- If using Sovos ShipCompliant to automate orders to a 3rd party fulfillment house, then Under "Fulfillment Houses" section, select the appropriate fulfillment house in the drop-down menu. If your fulfillment house is not included on this list, it is likely they are not integrated with Sovos ShipCompliant for order data transmission.

  Under the Status Mappings section, select "Sent to Fulfillment" in the drop-down menu for SC Shipment Status that corresponds with the proper Billing Status Group, which is the Billing status in Nexternal. For example, if orders are to automatically transmitted to your fulfillment company for processing at the time the customer submits the order and you are preauthorizing the credit card; Payment Accepted should correspond to Billing Status Group/Authorized. If you want to first capture the funds for the order BEFORE you push the order to your fulfillment company, select "Sent to Fulfillment" in drop down menu for SC Shipment Status to correspond with Billing Status Group/Paid. Once you collect the funds and Billing status switches to Paid, you will need to sync the order into Sovos ShipCompliant which will then automatically transmit to the fulfillment house to process. You may sync the order into ShipCompliant either at the order level or utilizing the provided batch process functionality.

Please reference the Sovos ShipCompliant manual, "Workflow for Importing Orders" available under the main Help tab in Sovos ShipCompliant for step-by-step instructions on the remaining order import process.

If you are still having difficulties setting up your Nexternal/ShipCompliant integration, please contact ShipCompliant support by emailing support@shipcompliant.com or calling (303) 996-2356, Monday through Friday, 8 AM to 5 PM PST.

Pulling Sales Tax Rates from Sovos ShipCompliant
We integrate with ShipCompliant's Sales Tax Tables. To turn this on navigate to Settings/Sales Tax/Third Party Sales Tax Provider, and pull down to ShipCompliant. To get the rates you expect for each location, you will need to make sure that you have made the correct tax preference selections within ShipCompliant - please contact ShipCompliant with any questions on that. Further, if a state requires that you charge tax on shipping as well as products, you will need to check the appropriate "TS" boxes within the Nexternal tax tables.