

Nexternal / VinNOW Synchronization Setup

Summary

Setting up the Nexternal/VinNOW Synchronization 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) Perform Product Synch from VinNOW
- 7) Perform Customer and Order Synch 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.

Alcoholic Beverage Tools [Preferences](#)

IDology:

User Name:

Password:

Password:
Re-type to confirm

ShipCompliant:

E-Mail Address:

Password:

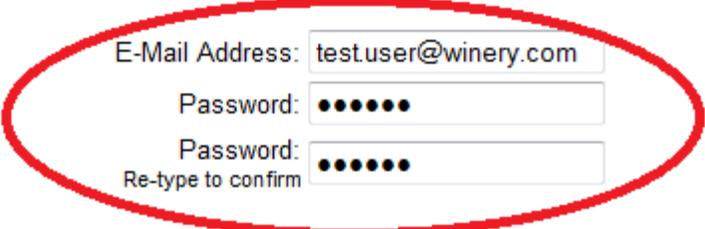
Password:
Re-type to confirm

VinNOW:

E-Mail Address:

Password:

Password:
Re-type to confirm



- 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 provided 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**

Available

Default

SKU:

VinNOW Key:

- 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: (optional)

ShipCompliant Product Key: (optional)

VinNOW Product Key: (optional)

ShipCompliant Brand Key: (optional)

VinNOW Brand Key: (optional)

- c. Click Finish.

To synch 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 Synch 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' window in the VinNOW application. The 'Web Info' tab is selected, and the checkbox 'Show this product on web shopping cart' is checked and circled in red. The product ID is 32010, and the description is 'Join Our Wine Club'. The sub-type is 'Wine Club'. The web sale price is \$0.00. The product category is 'WineClub'. The default unit is 'Each'. The retail price is \$0.00, and the sale price is \$0.00. The unit cost is \$0.00, and the wholesale price is \$0.00. The % Markup is 0.0000. The 'No Inventory Tracking' checkbox is checked. The 'Product Catalog/Web Description' field is empty.

- 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 synch 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 synch.

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 Synch:

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 displays the 'Product Maintenance' window in the VinNOW system. The 'Product ID' field is highlighted with a red circle and contains the value '32010'. The 'Description' field contains 'Join Our Wine Club', and the 'Register Desc.' field also contains 'Join Our Wine Club'. The 'Product Category' is set to 'WineClub'. The 'Default Unit' is 'Each'. The 'Retail Price', 'Sale Price', and 'Wholesale A' are all set to '\$0.00'. The 'Unit Cost' is '\$0.00' and the '% Markup' is '0.0000'. The 'Sub-Type' is 'Wine Club'. The 'Show this product on web shopping cart' checkbox is checked, and the 'Web Category' is 'WineClub'. The 'Web Sale Price' is '\$0.00'. The 'Product Catalog/Web Description' field is empty.

- 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.

Product Overrides ?

QuickBooks Sales Account:
(optional)

ShipCompliant Product Key:
(optional)

VinNOW Product Key:
(optional)

Individual Shipping Package

Package Size: in (L) x
(optional)

Alcohol Designation: (use default) ▼

Alcohol Details: Liters of

Inventory Warning Level:
(optional)

Expected Shipping Days:
(optional)

6) Click Finish.

Setup Automated Customer E-Mail

When a new customer is added to the Nexternal system from VinNOW, you can optionally setup an automated e-mail to be sent out to the newly added customer.

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 Settings \ Compatible Software \ Alcoholic Beverage Tools \ Preferences \ VinNOW.

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

Enable New Customer E-Mails

Message Format: Plain Text ▾

From: "Surfside Cellars" <customerservice@surfsidecellars.com>

Subject: Welcome to Surfside Cellars

Body: Dear FIRST_NAME LAST_NAME,

For your convenience we have added you to our online store front at <http://store.surfsidecellars.com>.

Your user name and password is as follows:

User Name: EMAIL
Password: PASSWORD

Best Regards,
Surfside Cellars

Personalization Terms: CUSTOMER_NO, FIRST_NAME, LAST_NAME, EMAIL, PASSWORD

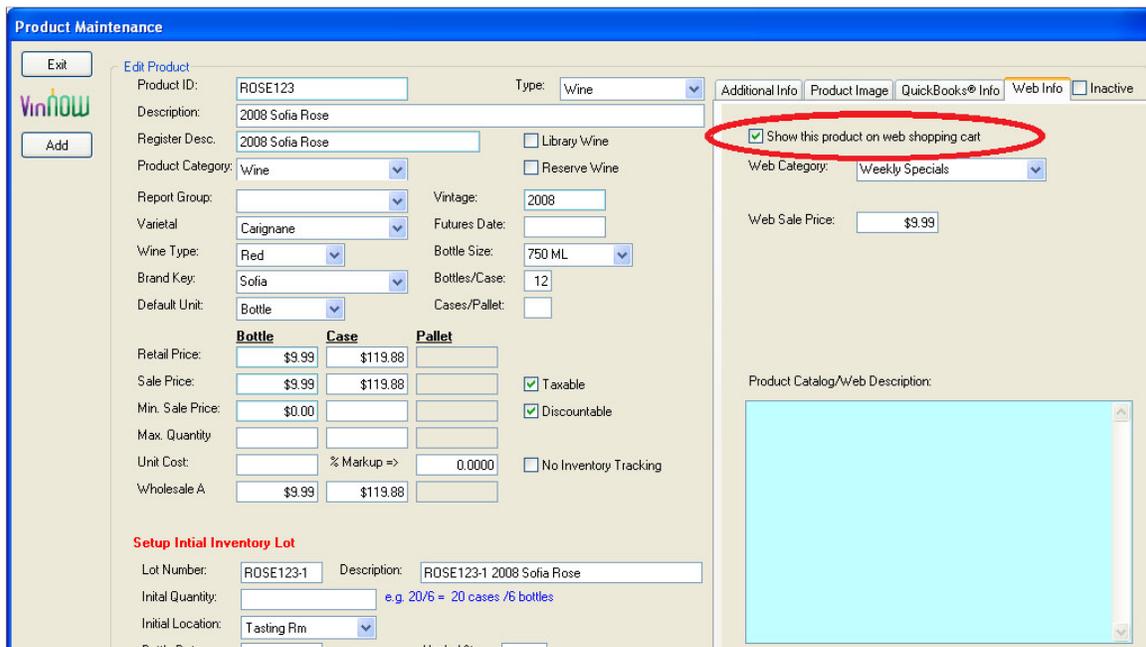
- 2) Check the “Enable New Customer E-Mails checkbox to enable this feature.
- 3) For the Message Format dropdown box you may select either Plain Text or HTML. If you choose HTML, make sure to mark line breaks with the
 tag.
- 4) For the Subject and Body fields you may use personalization terms (e.g. 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 Submit to save your changes.

Perform Product Synch from VinNOW

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

- 1) During the first synch 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 Vintage: 2008

Brand Key: Sofia Futures Date:

Default Unit: Bottle Bottle Size: 750 ML

Bottles/Case: 12

Cases/Pallet:

Retail Price: \$9.99 Case \$119.88 Pallet

Sale Price: \$9.99 \$119.88

Min. Sale Price: \$0.00

Max. Quantity:

Unit Cost: % Markup => 0.0000

Wholesale A: \$9.99 \$119.88

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

Alcohol %:

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

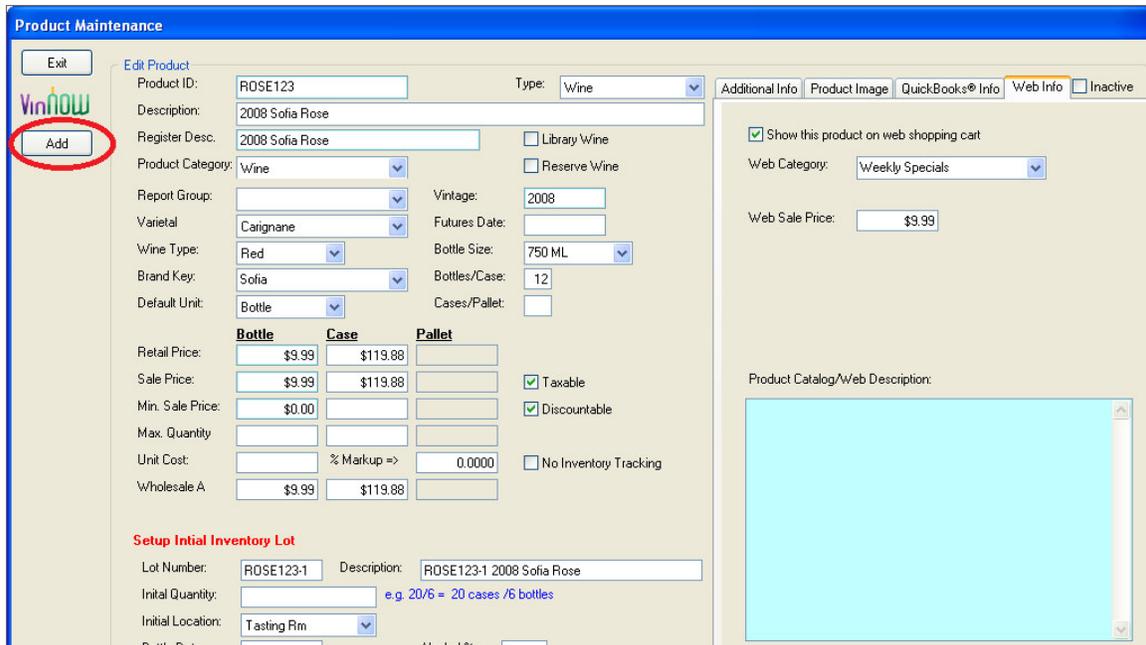
Show this product on web shopping cart

Web Category: Weekly Specials

Web Sale Price: \$9.99

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.

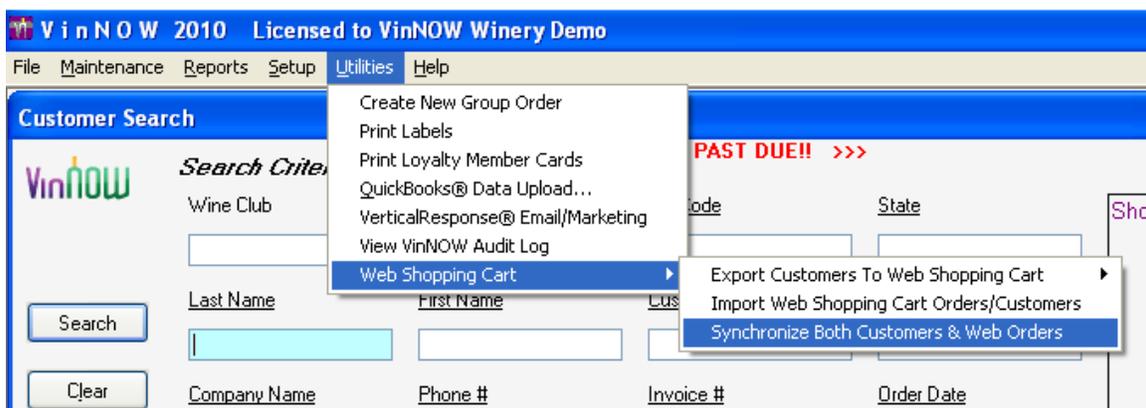


- 7) If this product is new to Nexternal, you should now login to the Nexternal Order Management System and edit the product information that is web-specific, such as the product image. Please note that every time you update the product in VinNOW, if the “Show this product on web shopping cart” option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

Perform Customer and Order Synch 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.