

## FedEx Order Batch Integration

To transfer your orders from Wine Direct to FedEx ShipManager on a batch basis, first please contact Microworks Technologies to set up an Integration Profile.

### Using the Wine Direct-Ship Manager integration to ship Ground shipments

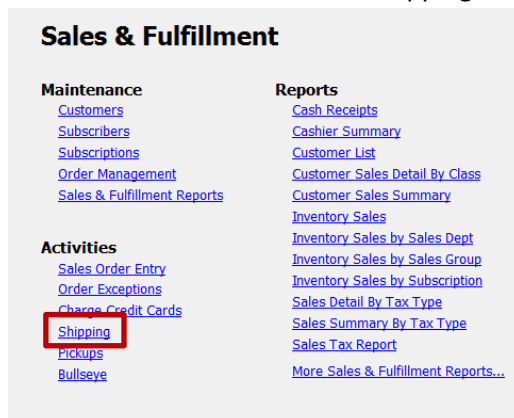
1. Launch Wine Direct



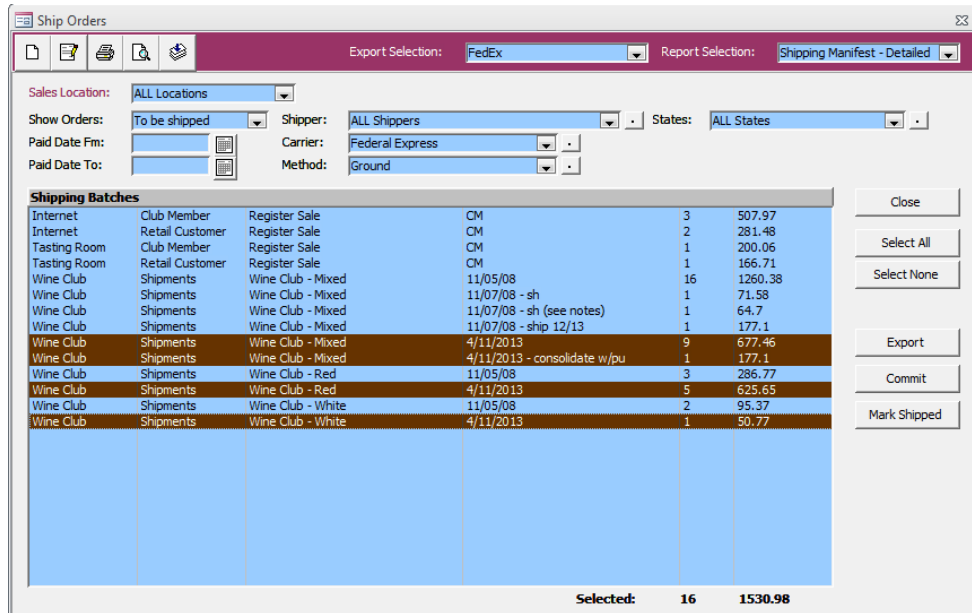
- a. Log in

A screenshot of the Wine Direct login dialog box. The window title is "Log on" and the text "Microworks Technologies, Inc. © Copyright 2004-2013" is in the top right corner. The main title is "Wine Direct". There are two input fields: "User name:" with the text "LloydV" and "Password:". At the bottom, there are three buttons: "OK", "Cancel", and "Exit".

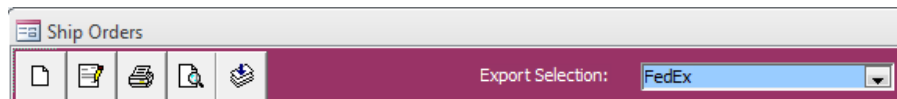
- b. Go to Sales & Fulfillment then Shipping



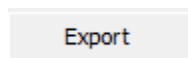
- c. Select the Shipper, Carrier (FedEx) and Method (Ground) you'd like to process first. You must process the different methods (Ground, Overnight, etc) in different batches. Ground is special so needs to use its own integration profile



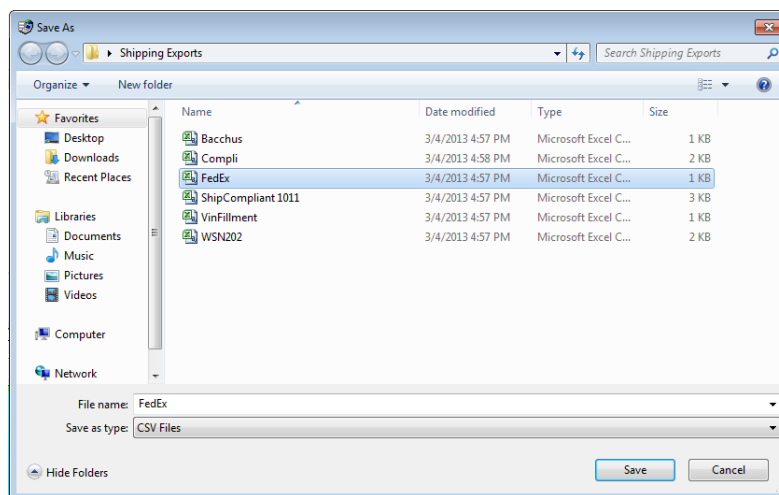
- d. In the Export Selection pull-down list, select “FedEx”



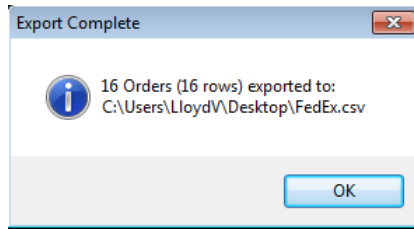
- e. Find the batch of orders you wish to process, highlight the batch(es) and click “Export”



- f. During the Integration setup, you will have selected a folder to export this file to. Please save the file to this folder now.



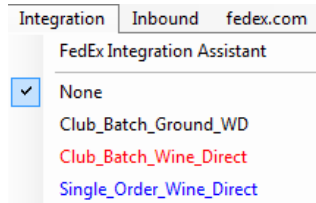
- g. Click OK



- h. Minimize Wine Direct
- 2. Launch FedEx ShipManager



- a. Click Integration, then select “FedEx Integration Assistant”



- b. Click Continue on the “Welcome to FedEx...” screen



- c. Click Continue on the “Preparing for a Successful Integration” screen



- d. Select the bullet next to Edit an existing profile and select the bullet next to “Club\_Batch\_Wine\_Direct”

**What do you want to do?**

Select “Create a new profile” to start a new profile. Select “Edit an existing profile” if you want to create a new profile by editing an existing profile, or if you want to complete an unfinished profile.

- Create a new profile  
Start a new profile (Clears all unsaved changes).
- Edit an existing profile  
Select the profile that you want to edit. To delete a profile, select it, and then click Remove. To save a copy of a profile with a new name, select it and then click Duplicate.

Name	Date Modified	Status
<input checked="" type="radio"/> Club_Batch_Wine_Direct	3/5/2013 3:12:01 PM	Complete
<input type="radio"/> Single_Order_Wine_Direct	3/5/2013 5:44:06 PM	Complete

- e. Click Continue

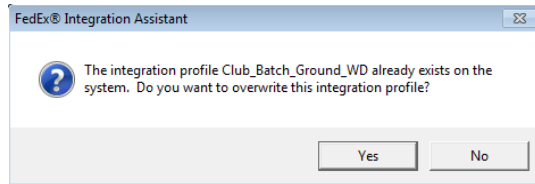
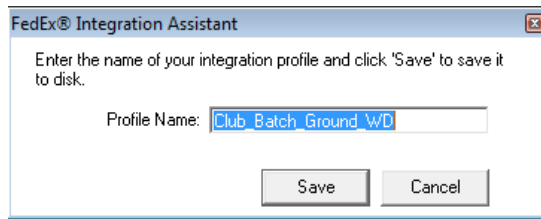
- f. Click “Import” then click “Match”

- a. Scroll down to “Weight” and enter the weight of the wine club package

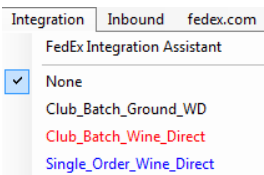
	Table	Field	Default (Optional)
<input type="radio"/>	FedEx.csv	Select your field	1 - Bill Gender
<input type="radio"/> Delivery Instructions	FedEx.csv	HandlingInstructio	
<input type="radio"/> Invoice Number	FedEx.csv	DocID	
<input type="radio"/> Package Type	FedEx.csv	Select your field	1 - Customer Pack
<input type="radio"/> Residential Delivery Flag	FedEx.csv	Residential	Select a default
<input type="radio"/> Service Type	FedEx.csv	Residential	92 - Ground
<input type="radio"/> Weight	FedEx.csv	Select your field	7 <input type="checkbox"/> Read Scale

- g. Click Save

- h. On the dialog box, click “Save” then “Yes”

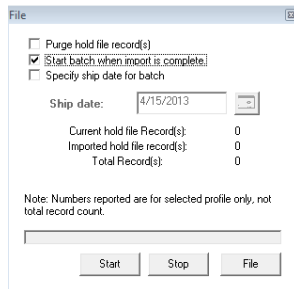


- i. Close the Integration Assistant screen
- j. Change the Integration, to Club\_Batch\_Ground\_WD
  - i. Click Integration then Club\_Batch\_Ground\_WD

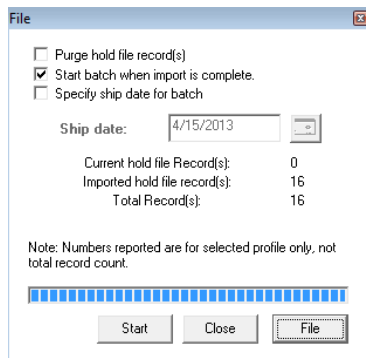


**Note: If it is already selected, Select “None” then re-select.**

- 3. Click “Start” to import the file

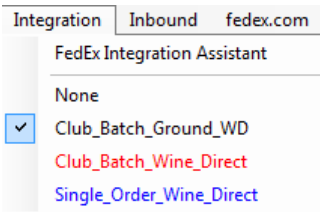


- 4. As it imports, it will print your shipping labels
  - a. When it is done, click “Close”



- 5. Check Hold File
  - a. If there are orders that could not be shipped, they will be in the hold file

- b. Click “Shipping List” then “Hold File”
  - c. Determine what needs to happen with these packages. If you need help interpreting, reach out to Microworks or FedEx.
6. Change profile back to None
- a. Click “Integration”
  - b. Click “None”



- c.
7. Close FedEx Ship Manager
8. If you would like to verify tracking numbers, you may do so by clicking the Tracking Details button in the Ship Orders List Editor.

Order #	Date	Last name	First name	Address	City	ST	Zip	Total	Status
62397	11/24/2009	Crenshaw	Alpha	5033 Pine Hollow Rd.	Washington	DC	20005	101.20	Limit Error
62416	11/24/2009	Duval	Reinaldo	2639 Anchor Court	Goodyear	AZ	85338	107.69	Prohibited

9. You will see the tracking number in the lower right hand corner of the screen

**Tracking** **Order No**  
62397

Ship to: **Alpha Crenshaw** Date: 11/24/2009  
Washington, DC Status: Paid

Bill to: **Alpha Crenshaw** Total: **\$101.20**  
Washington, DC

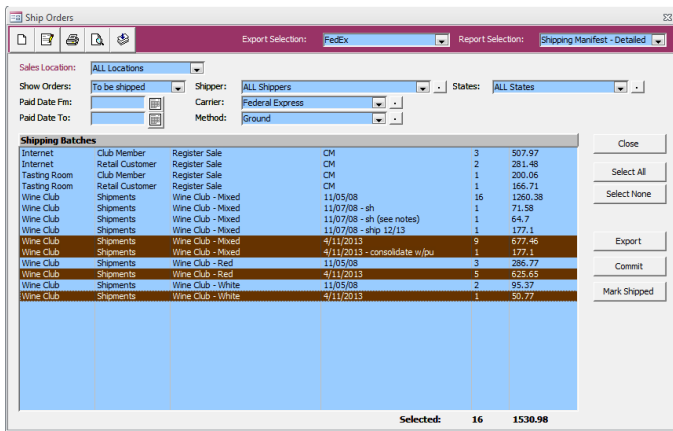
Wine Club Estimated Ship Date: 11/24/2009  
Shipments Date Marked Shipped:  
Wine Club - Red Marked Shipped By:  
11/05/09-Red Date Compliance Committed: 11/24/2008

**Pickup Order** **Ship Order**

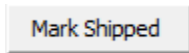
Picked Up:  Shipped by: Winery  
By:  Status:

Pickup Date:  Method: 2 Day Air  
Username:  Date Shipped: 11/23/09  
Signature:  Tracking No: 548510304393  
Reference:

- When ready to mark the orders as shipped, close the Ship Orders – List Editor and return to the shipping screen.



- With the orders selected that you have shipped, click “Mark Shipped”



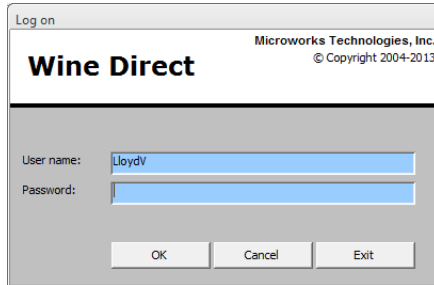
That’s it!

## Using the Wine Direct-Ship Manager Integration to ship non-Ground shipments

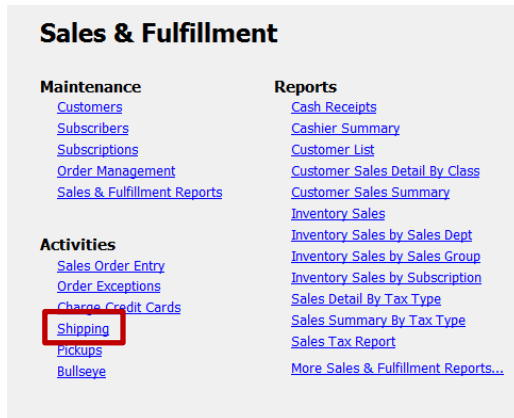
1. Launch Wine Direct



- a. Log in

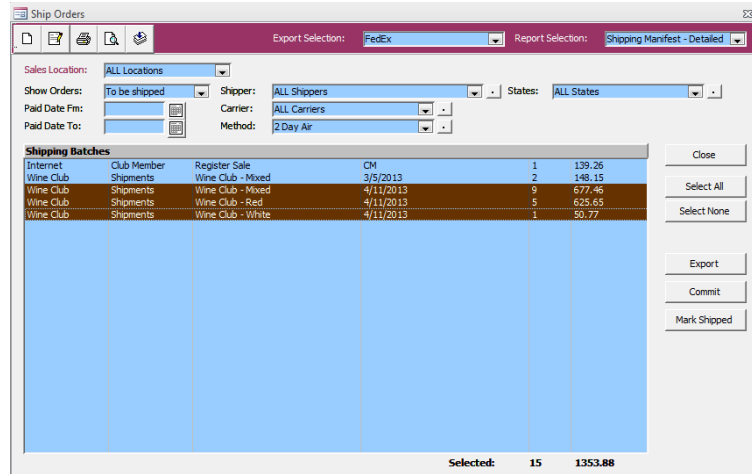


- b. Go to Sales & Fulfillment then Shipping

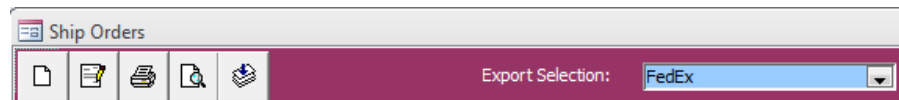




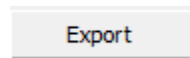
- c. Select the Shipper, Carrier (FedEx) and Method you'd like to process first. You must process the different methods (Ground, Overnight, etc) in different batches. Ground is special so needs to use its own integration profile.



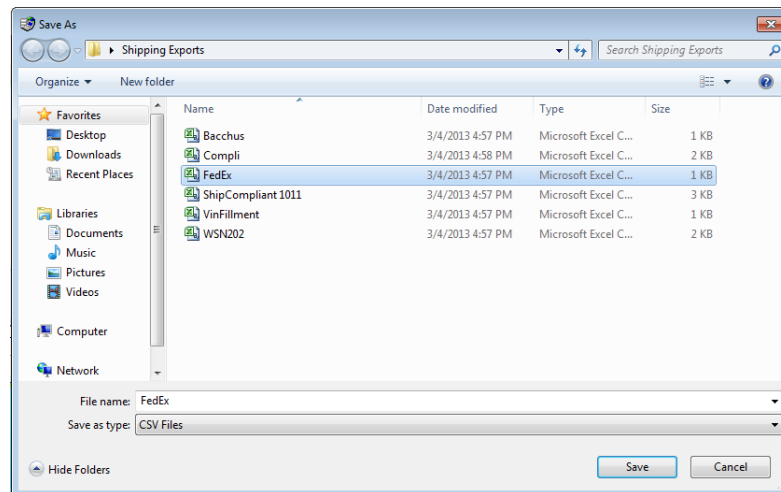
- d. In the Export Selection pull-down list, select “FedEx”



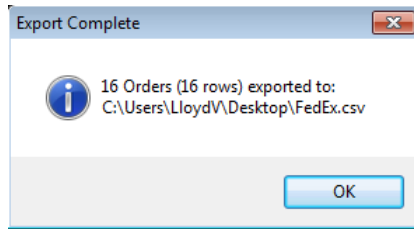
- e. Find the batch of orders you wish to process, highlight the batch(es) and click “Export”



- f. During the Integration setup, you will have selected a folder to export this file to. Please save the file to this folder now.



- g. Click OK

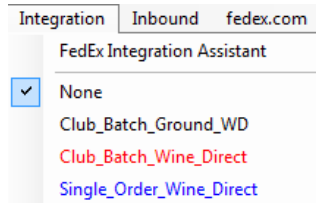


- h. Minimize Wine Direct

2. Launch FedEx ShipManager



- a. Click Integration, then select “FedEx Integration Assistant”



- b. Click Continue on the “Welcome to FedEx...” screen



- c. Click Continue on the “Preparing for a Successful Integration” screen



- d. Select the bullet next to Edit an existing profile and select the bullet next to “Club\_Batch\_Wine\_Direct”

**What do you want to do?**

Select “Create a new profile” to start a new profile. Select “Edit an existing profile” if you want to create a new profile by editing an existing profile, or if you want to complete an unfinished profile.

- Create a new profile  
Start a new profile (Clears all unsaved changes).
- Edit an existing profile  
Select the profile that you want to edit. To delete a profile, select it, and then click Remove. To save a copy of a profile with a new name, select it and then click Duplicate.

Name	Date Modified	Status
<input checked="" type="radio"/> Club_Batch_Wine_Direct	3/5/2013 3:12:01 PM	Complete
<input type="radio"/> Single_Order_Wine_Direct	3/5/2013 5:44:06 PM	Complete

Remove Duplicate



- e. Click Continue



- f. Click “Import” then click “Match”



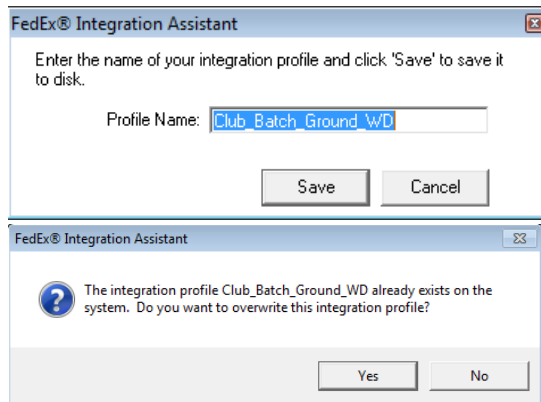
- a. Scroll down to Service Type and enter the method you are shipping the package
- b. In the “Weight” field, enter the weight of the wine club package

	Table	Field	Default (Optional)
<input type="radio"/> Delivery Instructions	FedEx.csv	HandlingInstructio	
<input type="radio"/> Invoice Number	FedEx.csv	DocID	
<input type="radio"/> Package Type	FedEx.csv	Select your field	1 - Customer Pack
<input type="radio"/> Residential Delivery Flag	FedEx.csv	Residential	Select a default
<input type="radio"/> Service Type	FedEx.csv	Select your field	5 - Standard Over
<input type="radio"/> Weight	FedEx.csv	Select your field	9 <input type="checkbox"/> Read Scale

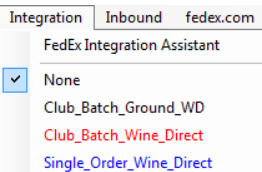
- g. Click Save



- h. On the dialog box, click “Save” then “Yes”

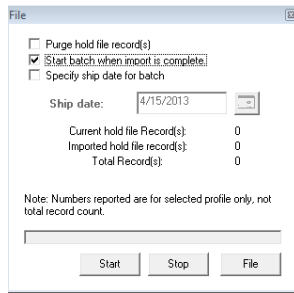


- i. Close FedEx Integration Assistant screen
- 1. Change the Integration to Club\_Batch\_Wine\_Direct
- c. Click Integration then Club\_Batch\_Wine\_Direct

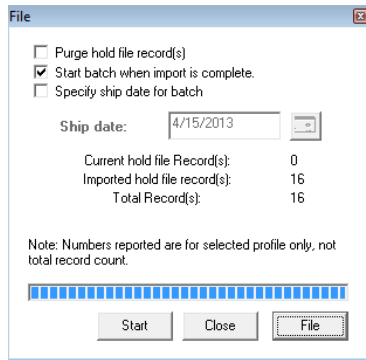


**Note: If it is already selected, Select “None” then re-select.**

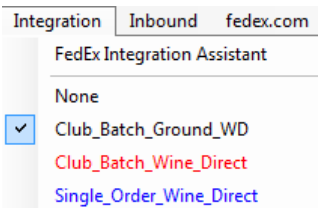
3. Click “Start” to import the file



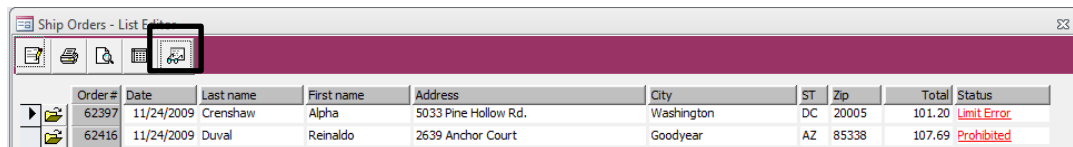
4. As it imports, it will print your shipping labels
  - a. When it is done, click “Close”



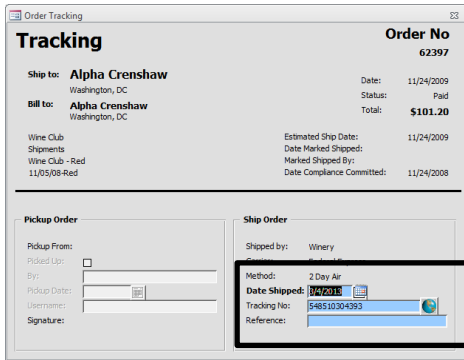
5. Check Hold File
  - a. If there are orders that could not be shipped, they will be in the hold file
  - b. Click “Shipping List” then “Hold File”
  - c. Determine what needs to happen with these packages. If you need help interpreting, reach out to Microworks or FedEx.
6. Change profile back to None
  - a. Click “Integration”
  - b. Click “None”



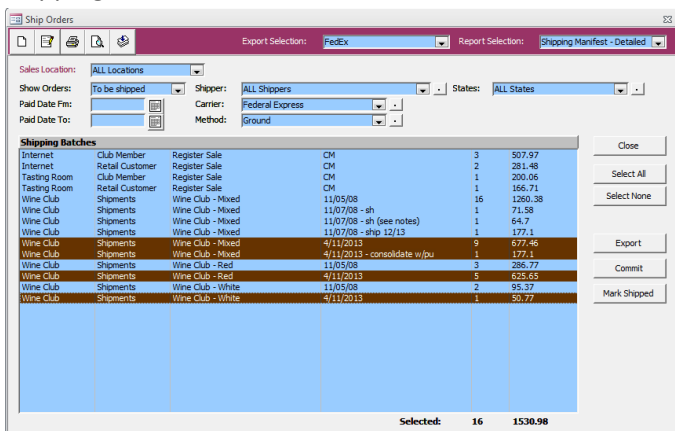
7. Close FedEx Ship Manager
8. If you would like to verify tracking numbers, you may do so by clicking the Tracking Details button in the Ship Orders List Editor.



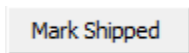
9. You will see the tracking number in the lower right hand corner of the screen



10. When ready to mark the orders as shipped, close the Ship Orders – List Editor and return to the shipping screen.



11. With the orders selected that you have shipped, click “Mark Shipped”



That’s it!