

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

Log on				
Wine	Direct	Microwor	ks Technologies, © Copyright 2004-:	
User name: Password:	LloydV			[
	ОК	Cancel	Exit	

b. Go to Sales & Fulfillment then Shipping

Sales & Fulfillment



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

Image: Selection: Export Selection: FedEx Report Selection: Shipping Max Sales Location: ALL Locations . </th <th>Σ</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>ip Orders</th> <th>a Sh</th>	Σ								ip Orders	a Sh
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Shipping Batches Carrier: Federal Express . Paid Date To: Image: Solid Stress . Internet Club Member Register Sale CM 3 507.97 Internet Club Member Register Sale CM 2 281.48 Tasting Room Retail Customer Register Sale CM 1 200.06 Tasting Room Retail Customer Register Sale CM 1 200.06 Tasting Room Retail Customer Register Sale CM 1 200.06 Wine Club Shipments Wine Club - Mixed 11/07/08 - sh 1 71.58 Wine Club Shipments Wine Club - Mixed 11/07/08 - ship 12/13 1 177.1 Wine Club Shipments Wine Club - Mixed 4/11/2013 9 677.46 Wine Club Shipments Wine Club - Mixed 11/05/08 3 286.77 Wine Club Shipments Wine Club - Red 4/11/2013 5 625.65 Wine Club Shipments Wine Club - Nixed 4/11/2013 5 625.65							•	LL Locations	s Location:	Sale
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Internet Retail Customer Register Sale CM 2 281.48 Tasting Room Club Member Register Sale CM 1 200.06 Tasting Room Retail Customer Register Sale CM 1 200.06 Wine Club Shipments Wine Club - Mixed 11/05/08 16 1260.38 Wine Club Shipments Wine Club - Mixed 11/07/08 - sh (see notes) 1 64.7 Wine Club Shipments Wine Club - Mixed 11/07/08 - sh (see notes) 1 64.7 Wine Club Shipments Wine Club - Mixed 11/07/08 - sh (see notes) 1 67.7 Wine Club Shipments Wine Club - Mixed 4/11/2013 9 677.46 Wine Club Shipments Wine Club - Mixed 4/11/2013 - consolidate w/pu 1 77.1 Wine Club Shipments Wine Club - Mixed 11/05/08 3 265.77 Wine Club Shipments Wine Club - Red 4/11/2013 5 252.65 Wine Club	Close								pping Batche	Shi
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Wine Club Shipments Wine Club - White 11/05/08 2 95.37	Commit									
vvite cub Shphients whe cub - white 1/1/2013 1 30.77	Mark Shipped									
		50.77	1 5		4/11/2013		ne Club - White	Snipments	e Club	
Selected: 16 1530.98		1530.98	16 1	cted	Sele					

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

== Sł	nip Ord	lers					
D	2	5	<u>a</u>	۲	Export Selection:	FedEx	-

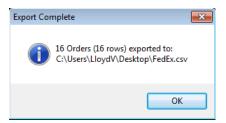
e. Find the batch of orders you wish to process, highlight the batch(es) and click "Export"

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

Save As						×				
🔾 🔾 🤛 🕹 Ship	ping E	xports		 ✓ ✓ Search 	Shipping Exports	Q				
Organize 🔻 New	folder				≡ ▼	0				
🔆 Favorites	^	Name	Date modified	Туре	Size					
Mesktop		🖳 Bacchus	3/4/2013 4:57 PM	Microsoft Excel C	1 KB					
鷆 Downloads		🖲 Compli	3/4/2013 4:58 PM	Microsoft Excel C	2 KB					
🔛 Recent Places						🖳 FedEx	3/4/2013 4:57 PM	Microsoft Excel C	1 KB	
		🐴 ShipCompliant 1011	3/4/2013 4:57 PM	Microsoft Excel C	3 KB					
🥽 Libraries		🐴 VinFillment	3/4/2013 4:57 PM	Microsoft Excel C	1 KB					
 Documents Music Pictures Videos Computer 	III	പ്പ് WSN202	3/4/2013 4:57 PM	Microsoft Excel C	2 KB					
年 Network	-									
File name:	edEx					•				
Save as type:	SV File	25				·				
Alide Folders				Sav	e Canc	el				

g. Click OK

Export



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



a. Click Integration, then select "FedEx Integration Assistant"

Inte	gration	Inbound	fedex.com
	FedEx In	tegration A	ssistant
~	None		
	Club_Ba	tch_Ground	_WD
	Club_Ba	tch_Wine_D	irect
	Single_(Order_Wine_	Direct

b. Click Continue on the "Welcome to FedEx..." screen

Continue 🕥

c. Click Continue on the "Preparing for a Successful Integration" screen

Continue 🕥

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 d	o?						
	start a new profile. Select "Edit an e: g profile, or if you want to complete a		ate a				
 Create a new profile 							
Start a new profile (Clears	all unsaved changes).						
 Edit an existing profile Select the profile that you 	vant to edit. To delete a profile, selec	t it, and then click Remove. To s	ave				
a copy of a profile with a n	ew name, select it and then click Du	plicate.					
Name	Date Modified	Status	*				
Club_Batch_Wine_Direct	3/5/2013 3:12:01 PM	Complete					
Single_Order_Wine_Direct	t 3/5/2013 5:44:06 PM	Complete					
			~				
	Remove Duplicate						
	Back Continue	D					
Click Continue							
Continue 🕑							
	alial ((NAatala))						
Click "Import" thei	I CIICK IVIATCH						
Welcome Beg	in Import Expo	rt Finish		Help			
Source Forma	t Shipping Lool	kup Information	Match	Conversion			
a. Scroll down to "Weight" and enter the weight of the wine club package							

		Table		Field		Default (Optional)	
O Delivery	Instructions	FedEx.csv		HandlingInstructio	• •		1
C Invoice	Number	FedEx.csv	-	DocID	•		
C Package	е Туре	FedEx.csv	Ŧ	Select your field	•	1 - Customer Pack 💌	
C Residen	tial Delivery	FedEx.csv	-	Residential	-	Select a default 💌	
C Service	Туре	FedEx.csv	-	Residential	•	92 - Ground 🛛 💌	
C Weight		FedEx.csv	$\overline{\mathbf{v}}$	Select your field	Ŧ	7 Read Scale	=

Click Save g.

e.

f.

Save

h. On the dialog box, click "Save" then "Yes"

FedEx® Integration Assistant						
Enter the name of your integration profile and click 'Save' to save it to disk.						
Profile Name: Club_Batch_Ground_WD						
Save Cancel						
FedEx® Integration Assistant	83					
The integration profile Club_Batch_Ground_WD already exists on the system. Do you want to overwrite this integration profile?						
Yes No						

- i. Close the Integration Assistant screen
- j. Change the Integration, to Club_Batch_Ground_WD
 - i. Click Integration then Club_Batch_Ground_WD

Int	egration	Inbound	fedex.com					
	FedEx Ir	ntegration As	sistant					
~	None							
	Club_Ba	Club_Batch_Ground_WD						
	Club_Ba	Club_Batch_Wine_Direct						
	Single_0	Order_Wine_	Direct					

Note: If it is already selected, Select "None" then re-select.

3. Click "Start" to import the file

Sh	ip date:	4/15/2013		0
	Imported he	d file Record(s): old file record(s): Record(s):	0 0 0	
	Total		-	

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

File	×						
Purge hold file record(s) Start batch when import is complete. Specify ship date for batch							
Ship date: 4/15/2013							
Current hold file Record(s): 0 Imported hold file record(s): 16 Total Record(s): 16							
Note: Numbers reported are for selected profile only, not total record count.							
Start Close File							

- 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"

	Inte	egration	Inbound	fedex.com
		FedEx In	tegration As	sistant
		None		
	~	Club_Ba	tch_Ground	_WD
		Club_Ba	tch_Wine_D	irect
c.		Single_(Order_Wine_	Direct

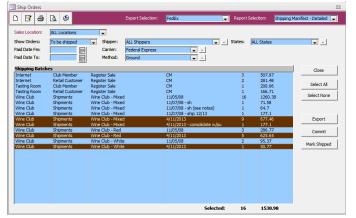
- 7. Close FedEx Ship Manager
- 8. If you would like to verify tracking numbers, you may do so by clicking the Tracking Details button in the Ship Orders List Editor.

📰 Ship Orders - List E											23
84											
	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

rack	king	Orde	er No
laci	ling		62397
Ship to:	Alpha Crenshaw	Date: 1	1/24/2009
	Washington, DC	Status:	Paid
Bill to:	Alpha Crenshaw Washington, DC	Total:	5101.20
Wine Club Shipments		Estimated Ship Date: 1 Date Marked Shipped:	1/24/2009
Wine Club	- Red	Marked Shipped By:	
Wine Club 11/05/08-	- Red		1/24/2008
Wine Club	- Red Red		1/24/2008
Wine Club 11/05/084	- Red Red der	Date Compliance Committed: 1	1/24/2008
Wine Club 11/05/08-	- Red Red der	Date Compliance Committed: 1 Ship Order	1/24/2008
Wine Club 11/05/084 Pickup Ore	- Red Red der m:	Date Compliance Committed: 1 Ship Order	1/24/2008
Wine Club 11/05/08-1 Pickup Oro Pickup From Picked Up:	- Red der	Date Compliance Committed: 1 Ship Order	1/24/2008
Wine Club 11/05/08-1 Pickup Ore Pickup From Picked Up: By:	• Red der m: ::::::::::::::::::::::::::::::::::::	Date Compliance Committed: 1 Ship Order Ship Order Shipped by: Wherey Consultation Method: 2 Day Ar	1/24/2008

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!

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

1. Launch Wine Direct



a. Log in

Log on			
Wine	Direct	Microwo	rks Technologies, Inc. © Copyright 2004-2013
User name: Password:	LloydV		
	ОК	Cancel	Exit

b. Go to Sales & Fulfillment then Shipping

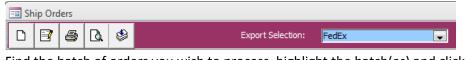
Sales & Fulfillment

Maintenance	Reports Cash Receipts
Customers Subscribers Subscriptions Order Management Sales & Fulfillment Reports	Cashi receipts Cashier Summary Customer List Customer Sales Detail By Class Customer Sales Summary
Activities Sales Order Entry Order Exceptions Charge Credit Cards Shipping Pickups Bullseye	Inventory Sales Inventory Sales by Sales Dept Inventory Sales by Sales Group Inventory Sales by Subscription Sales Detail By Tax Type Sales Summary By Tax Type Sales Tax Report More Sales & Fulfillment Reports

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.

Ship Orders									23
D 🖻 🎒	۵ ک		Export Selection:	FedEx		Report S	election:	Shipping Manifest - Detailed	•
Sales Location:	ALL Locations								
Show Orders:	To be shipped	Shipper:	ALL Shippers		💌 . St	ates:	ALL States	. ·	
Paid Date Fm:		Carrier:	ALL Carriers	-	·				
Paid Date To:		Method:	2 Day Air		•				
Shipping Batch								Close	1
Internet Wine Club	Club Member Shipments	Register Sale Wine Club - Mixe		CM 3/5/2013		1 2	139.26 148.15		_
Wine Club	Shipments	Wine Club - Mixe		4/11/2013		9	677.46	Select All	
Wine Club Wine Club	Shipments Shipments	Wine Club - Red Wine Club - Whi		4/11/2013 4/11/2013			625.65 50.77	Select None	1
								Export Commit Mark Shipped	
					Selected:	15	1353.8	38	

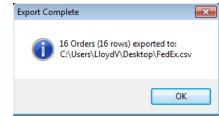
d. In the Export Selection pull-down list, select "FedEx"



- 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.

	w folder				R	0
Organize 🔻 Ne	wfolder				800 -	
🔆 Favorites	Â	Name	Date modified	Туре	Size	
🧮 Desktop		🖳 Bacchus	3/4/2013 4:57 PM	Microsoft Excel C	1 KB	
🗼 Downloads		🖳 Compli	3/4/2013 4:58 PM	Microsoft Excel C	2 KB	
📃 Recent Places		🖳 FedEx	3/4/2013 4:57 PM	Microsoft Excel C	1 KB	
		🖳 ShipCompliant 1011	3/4/2013 4:57 PM	Microsoft Excel C	3 KB	
ز Libraries		🖳 VinFillment	3/4/2013 4:57 PM	Microsoft Excel C	1 KB	
Documents Music	E	码 WSN202	3/4/2013 4:57 PM	Microsoft Excel C	2 KB	
Fictures						
👰 Computer						
年 Network	-					
File name:	FedEx					
Save as type:	CSV Fil	es				

g. Click OK



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



a. Click Integration, then select "FedEx Integration Assistant"

Inte	egration	Inbound	fedex.com	
	FedEx In	tegration As	ssistant	
~	None			
	Club_Ba	tch_Ground	_WD	
	Club_Ba	tch_Wine_D	irect	
	Single_(Order_Wine_Direct		

b. Click Continue on the "Welcome to FedEx..." screen

Continue 🕟

c. Click Continue on the "Preparing for a Successful Integration" screen

Continue 🕟

d. Select the bullet next to Edit an existing profile and select the bullet next to "Club_Batch_Wine_Direct"

	ct "Create a new profile" to start profile by editing an existing pro			nt to create
0	Create a new profile			
•	Start a new profile (Clears all ur Edit an existing profile Select the profile that you want	2 /	ct it, and then click Remov	ve. To save
	a copy of a profile with a new n	ame, select it and then click Du	plicate.	
	Name	Date Modified	Status	
•	Club_Batch_Wine_Direct	3/5/2013 3:12:01 PM	Complete	
0	Single_Order_Wine_Direct	3/5/2013 5:44:06 PM	Complete	
		Remove Duplicate		-

e. Click Continue

Continue 🕑

f. Click "Import" then click "Match"

	Welcome	Begin	Import	Export	Finish		H	elp
1	Source	Format	Shipping	Lookup	Information	Match	Conversion	

- 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)	
 Delivery Instructions 	FedEx.csv 🗾	HandlingInstructio 💌		*
O Invoice Number	FedEx.csv 🗾	DoclD 🗨		
Package Type	FedEx.csv 🗾	Select your field 💌	1 - Customer Pack 💌	
 Residential Delivery Flag 	FedEx.csv 🔽	Residential 🔹	Select a default 💌	
 Service Type 	FedEx.csv 🗾	Select your field 💌	5 - Standard Over 💌	_
C Weight	FedEx.csv 🗾	Select your field 💌	9 Read Scale	=

g. Click Save

<u>Save</u>

h. On the dialog box, click "Save" then "Yes"

FedEx® Integration Assistant					
Enter the name of your integration profile and click 'Save' to save it to disk.					
Profile Name: Club_Batch_Ground_WD					
Save Cancel					
FedEx® Integration Assistant	88				
The integration profile Club_Batch_Ground_WD already exists on the system. Do you want to overwrite this integration profile?					
	_				

- i. Close FedEx Integration Assistant screen
- 1. Change the Integration to Club_Batch_Wine_Direct
 - c. Click Integration then Club_Batch_ Wine_Direct

Inte	egration	Inbound	fedex.com
	FedEx Ir	tegration A	ssistant
~	None		
	Club_Ba	tch_Ground	_WD
	Club_Ba	tch_Wine_D	irect
	Single_(Order_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"

File			
🔽 Start b	hold file record atch when imp y ship date for l	ort is complete.	
Ship	date:	4/15/2013	
	urrent hold file ported hold file		0 16
	Total Reco		16
Note: Numb total record		re for selected pr	ofile only, not
	Start	Close	File
	Start	Close	File

- 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"

Inte	gration	Inbound	fedex.com
	FedEx In	tegration A	ssistant
	None		
~	Club_Ba	tch_Ground	L_WD
	Club_Ba	tch_Wine_D	irect
	Single_(Order_Wine_	Direct

7. Close FedEx Ship Manager

c.

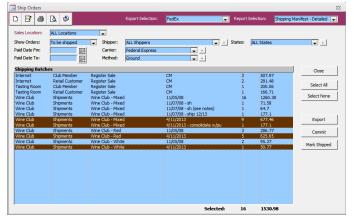
8. If you would like to verify tracking numbers, you may do so by clicking the Tracking Details button in the Ship Orders List Editor.

📧 Ship (ist Editor								ξ
	Order#	Date	Last name	First name	Address	City	ST	Zip	Total	Status
1	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

rad	king	Order No	0
acr	ling	62397	7
ship to:	Alpha Crenshaw Washington, DC	Date: 11/24/2009 Status: Pair	
Sill to:	Alpha Crenshaw Washington, DC	Total: \$101.20	
Vine Club Shipments		Estimated Ship Date: 11/24/2009 Date Marked Shipped:	9
Nine Club	- Red	Marked Shipped By: Date Compliance Committed: 11/24/2008	18
Nine Club 11/05/084	- Red	Marked Shipped By:	8
Nine Club 11/05/08-1	- Red Red	Marked Shipped By:	18
Nine Club 11/05/084 ickup Ore	-Red Red der m:	Marked Shipped By: Date Compliance Committed: 11/24/2000	18
Wine Club 11/05/084 ickup Ore Ndkup From	- Red Red der	Marked Shipped By: Date Compliance Committed: 11/24/2001 Ship Order Shipped by: Winery	18
Nine Club 11/05/084 ickup Ore	-Red der 	Marked Shipped By: Date Compliance Committed: 11/24/2000	18
Wine Club 11/05/08-1 ickup Ore Ndkup From Ndked Up:	er IIII	Marked Shipped By: Date Compliance Committed: 11/24/2001 Ship Order Shipped by: Winery Method: 2 Day Ar	18

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"
Mark Shipped

That's it!