

ShipWorks®

Reference Guide

Adding a Generic File Store - Using FTP

[Adding a Generic File Store Using FTP](#)

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Note: We have provided a test file for you. It is attached to the end of this help article. It is the same file used in this tutorial. So, if you do not have an order file currently but still wish to learn the process, please feel free to download the attached Excel file and use it to learn the mapping process.

Background

ShipWorks currently has integrations to more than 80 online marketplaces and sales channels. However, in some case it may be necessary to import orders from a source other than one of our integrations. For example, you may sell on a sales channel or store that ShipWorks is not directly integrated with, but you can export your order information from your sales channel into an Excel spreadsheet, CSV file, or a text file.

The good news is that ShipWorks allows you to easily grab data from your external file so that you can import the order information into the ShipWorks software. You then have all the ShipWorks tools available to you to easily and quickly ship your orders.

In this article, we will take a look at how to map your external order file to the ShipWorks software using an FTP account.

Please Note:

If you will be importing from a local directory on your PC or Network, [click here for instructions](#).

If you will be importing your orders from an email account, [click here for instructions](#).

First Things First

There are a couple of things that you will need to have in place prior to beginning the process of mapping your file to the ShipWorks software:

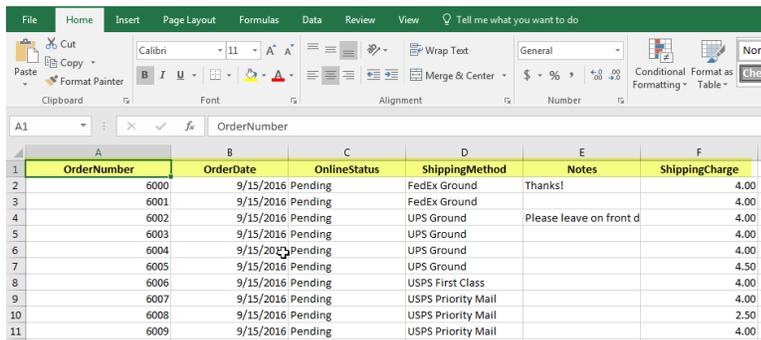
1. You will need the file that you wish to import into ShipWorks. The file will need to include at least one order.

Q: What are the requirements for the file?

A: Great question! ShipWorks can import from an Excel spreadsheet (.xls or .xlsx file), a .csv (comma delimited) or text file, or from an XML file. There is no set format or structure the file needs to be in because we will be defining what data is pulled from the file and to which fields in ShipWorks the data gets imported into. However, the file does need to have column headings.

- » The file needs to be an Excel spreadsheet, a .csv file, a text (delimited) file, or an XML file.
- » The file needs to have valid column headings.
- » Order numbers must be numerical values only. For example, 12345 can be imported. A12345 cannot be imported.
- » The Order Number field is required.

Here is a quick example of what an Excel file might look like. Note the valid column headings.



OrderNumber	OrderDate	OnlineStatus	ShippingMethod	Notes	ShippingCharge
6000	9/15/2016	Pending	FedEx Ground	Thanks!	4.00
6001	9/15/2016	Pending	FedEx Ground		4.00
6002	9/15/2016	Pending	UPS Ground	Please leave on front d	4.00
6003	9/15/2016	Pending	UPS Ground		4.00
6004	9/15/2016	Pending	UPS Ground		4.00
6005	9/15/2016	Pending	UPS Ground		4.50
6006	9/15/2016	Pending	USPS First Class		4.00
6007	9/15/2016	Pending	USPS Priority Mail		4.00
6008	9/15/2016	Pending	USPS Priority Mail		2.50
6009	9/15/2016	Pending	USPS Priority Mail		4.00

2. In addition to having your file available to you, you will need to have a unique folder or directory available in which you will place the files to be imported into ShipWorks. This can be a folder on your ShipWorks computer, a

folder on a network drive, an FTP location or even an incoming email. This directory needs to be used only for the importing of your orders into ShipWorks. For this example, we will be pulling our orders from an FTP (File Transfer Protocol) directory.

3. You may need to use an FTP client such as FileZilla in order to create the needed FTP directories and to transfer your order file to the FTP location. In addition to an FTP client you may need the FTP Host address, FTP username and password. If you are unsure of how to use an FTP client or if you do not have this information, please reach out to your local IT professional or network administrator.

The Process

Mapping your file to ShipWorks can be broken down into the following steps:

1. Creating the folders or directories from which you will import the file(s).
2. Selecting the type of file to import
3. Pointing ShipWorks to the folder or directory.
4. Selecting the import file you will use to create your mapping.
5. Mapping the fields in your file to the fields in ShipWorks.
6. Importing your orders.

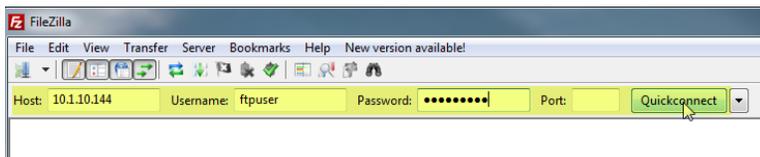
Creating the Import Directory

ShipWorks can import from your PC, from a network location, FTP directory or even pull from an email. In this example we will be pulling our orders from a folder using an FTP (File Transfer Protocol) connection. This is useful if you are running multiple ShipWorks computers and would like for more than one of them to be able to import the order files from a remote location or server.

We want to have a unique directory from which only ShipWorks orders are imported. If any other files are placed in this directory you may encounter errors in ShipWorks and unexpected behavior may occur.

When using an FTP location, you may need to use an FTP Client such as FileZilla to connect to and maintain your FTP directories. In the below examples, we will be using FileZilla but you can use whichever FTP client works for you. If you have questions regarding FTP, please reach out to your resident IT professional.

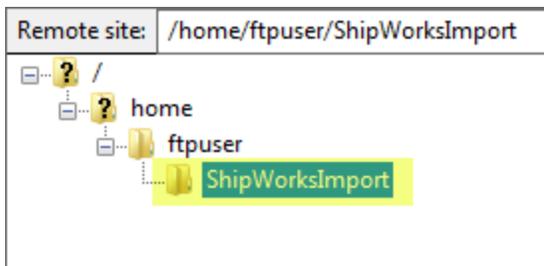
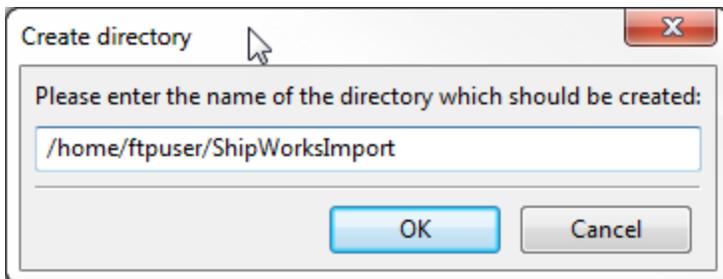
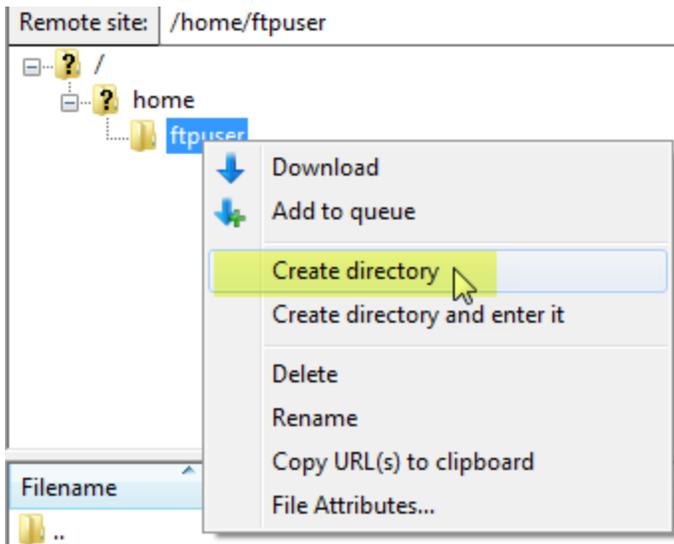
1. Connect to your FTP directory using an FTP client such as FileZilla. If you are unsure of how to do this, please reach out to your local IT professional.



2. Once connected, navigate to the location from which you would like to import files into ShipWorks.

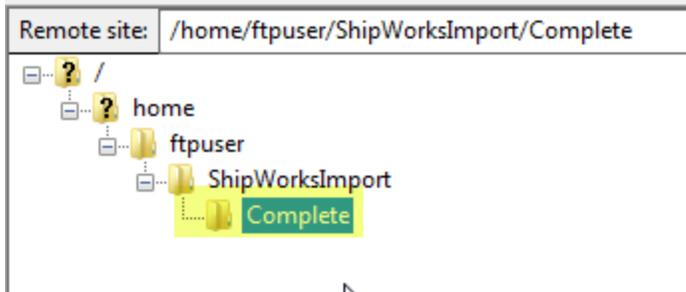


3. Create a new directory at this location and name it **ShipWorksImport**.



3. Inside of the **ShipWorksImport** directory create a new directory and name it **Complete**.

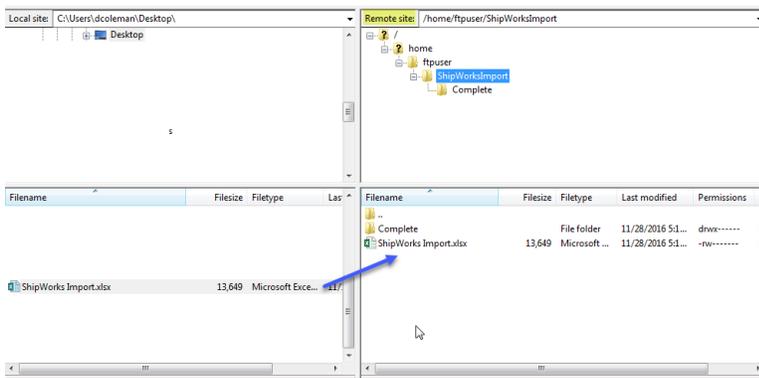
Note: This folder is used to store the files that are successfully imported into ShipWorks so that you can refer back to them if needed.



4. Now, transfer your file containing your orders into the **ShipWorksImport** folder using your FTP Client.

Note: The name of your file does not matter. It can be named whatever makes sense to you. Once the orders are imported into ShipWorks, ShipWorks will move the file into the Complete folder and append the file name with the import date and time.

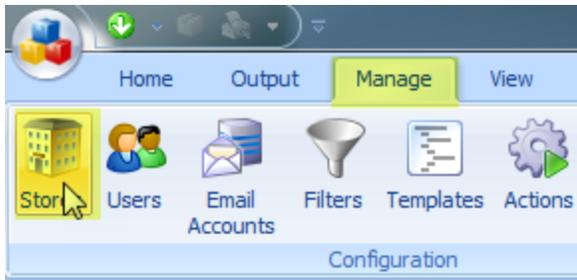
Note: You will also need a local copy of your order file available to you on the ShipWorks PC. This file will be used to create the Generic File Import map later in this article.



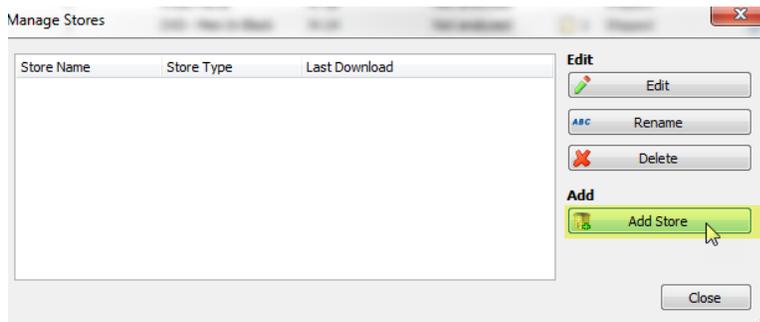
Selecting the File Type

Great! Now, you are ready to begin working in the ShipWorks application.

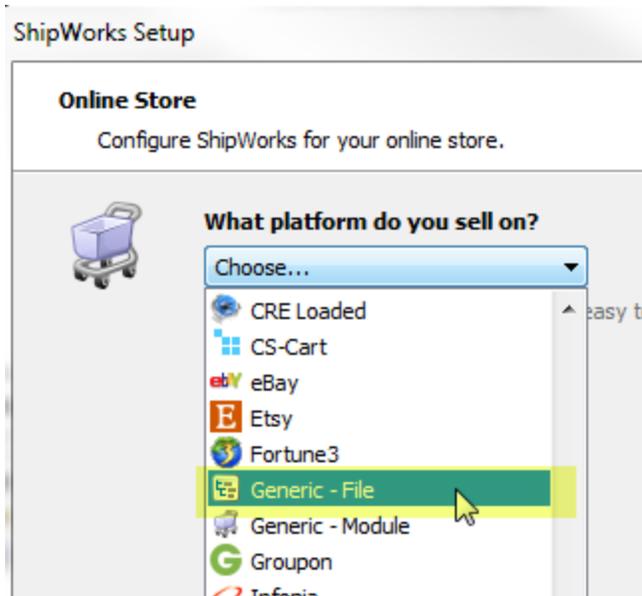
1. If you have not done so, launch the ShipWorks application.
2. Inside of ShipWorks, click on the **Manage** tab and then click on the **Stores** button.



3. On the **Manage Stores** screen, click on the **Add Store** button.



4. From the **What platform do you sell on?** menu, select **Generic File**. Then, click **Next**.



5. Now, select the type of file you will be importing from the **What type of file will ShipWorks be importing:** option. Then, click **Next**.

For this example, we are importing from an Excel spreadsheet, so we have selected the Excel option.

What type of file will ShipWorks be importing:

CSV / Text



Select this option to import flat files of delimited data.

XML



Select this option to import XML files of hierarchical data.

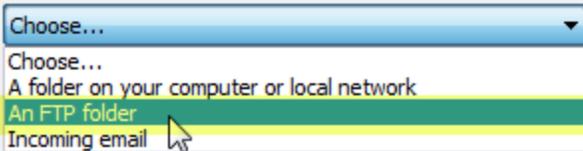
Excel



Select this option to import Microsoft Excel formatted files.

6. Next, we need to tell ShipWorks from where we are pulling our data. From the **Import the data from:** menu select **An FTP Folder**.

Import the data from:



Connecting to the FTP Account

7. On the **Import the Data From:** screen, click on the **Configure** button to the right of the FTP Server field.



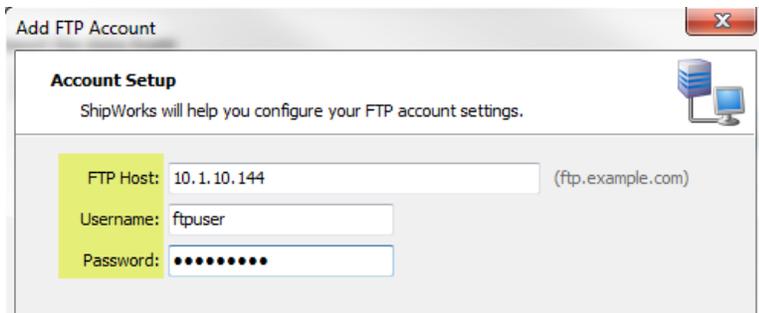
7a. Enter the FTP account settings used to connect to your FTP server. You will need the following information:

FTP Host:

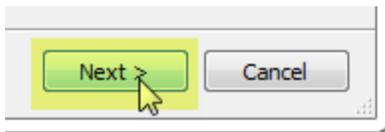
Username:

Password:

If you are unsure of this information, please reach out to your local IT professional or network administrator.

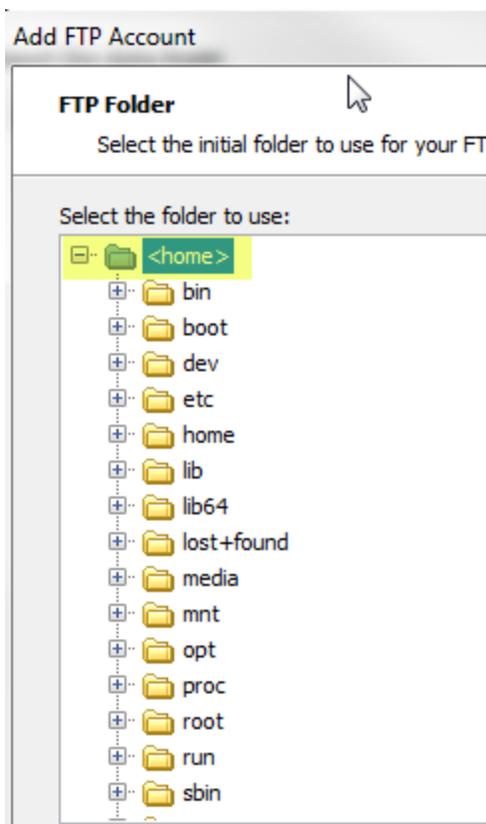


7b. Once the information is entered, click **Next**.

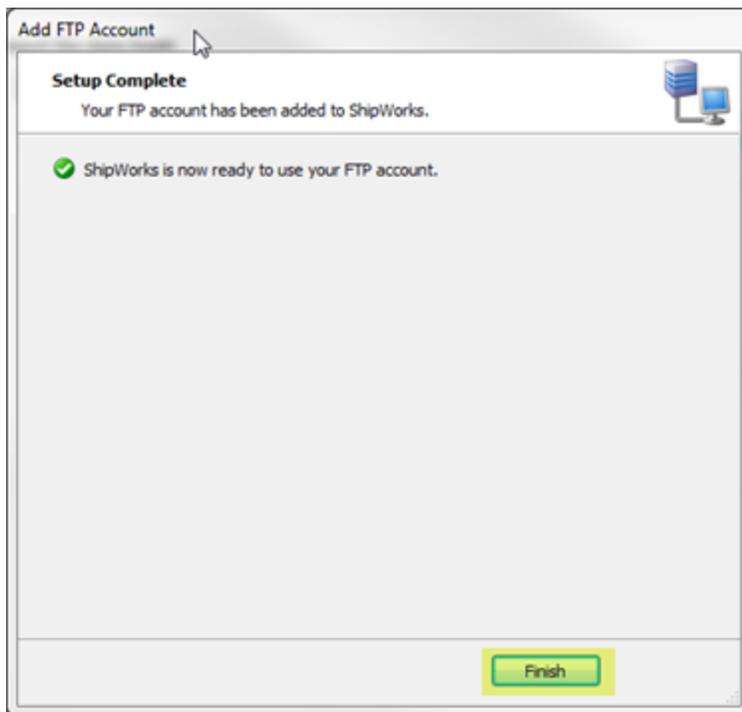


7c. If prompted to select a directory from within your FTP location, select the root directory of your FTP. Typically, this is the first directory listed in the tree. Then, click **Next**.

Note: In our example the directory is named <home> however, yours may be named differently.



7d. Once you have connected to your FTP account successfully, click **Finish**.



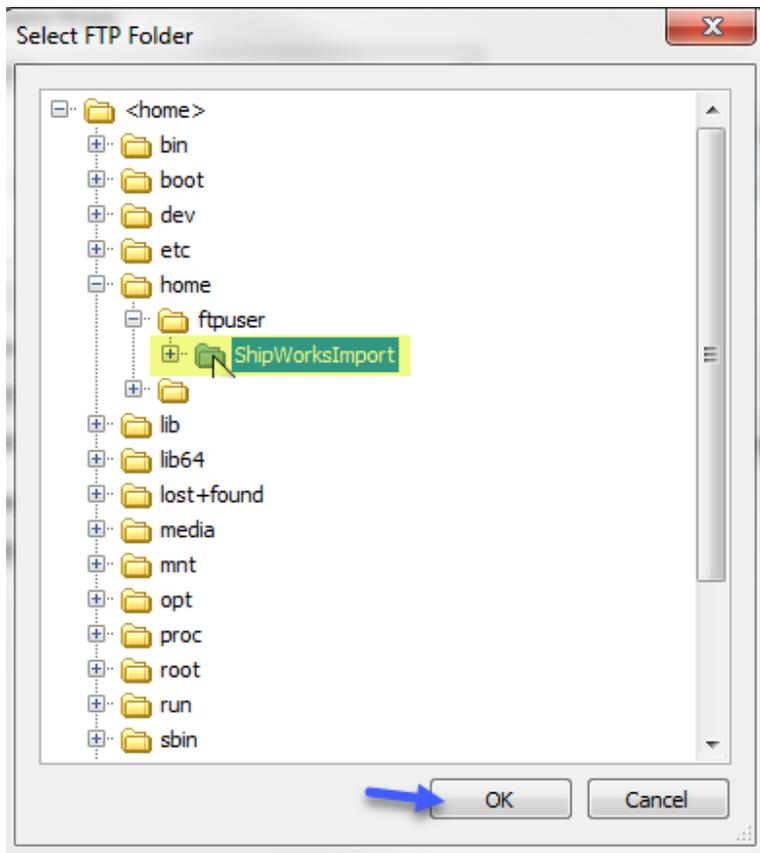
Selecting the Incoming FTP Folder

Now, let's tell ShipWorks the specific directory from which we will be pulling our order file.

8. Click on the **Browse** button to the right of the **Incoming Folder:** field.



8a. Navigate to the **ShipWorksImport** directory that we created in the above steps. Then, click **OK**.



Note: You have options available for:

- **Only import file names that match this pattern** - Used to tell ShipWorks to only import files that match a defined naming pattern.
- **Skip files names that match this pattern** - Used to tell ShipWorks to skip importing any files that match a defined naming pattern.

i File Name Matching

You can use a * to represent any number of characters, or a ? to represent a single character.

*.csv would match all files that end in the extension csv.

File?.* would match any file that started with 'File' and then a single character before the extension, such as File1.txt or File2.xml.

We will not select either of these options since we are using this folder ONLY for files that will be imported into ShipWorks and the files will always be named the same.

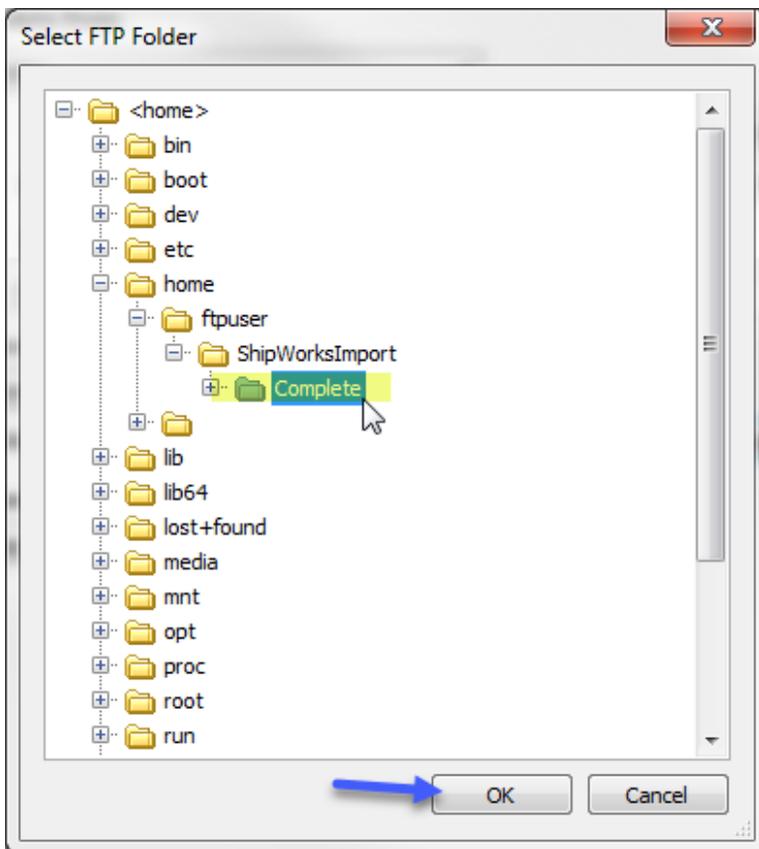
After a Successful Import

Now, let's tell ShipWorks to where the successfully imported file should be moved. (Remember that we created the Complete folder earlier?)

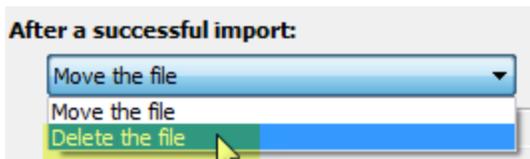
9. Click on the **Browse** button located in the **After a successful import:** section.



- 9a. Navigate to the **Complete** folder that we created in the previous section. Then, click **OK**.



Note: You do have the option of having the file deleted after a successful import.

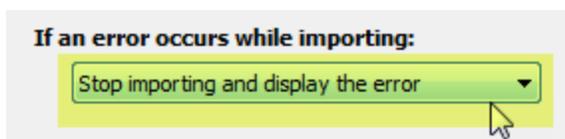


When an Error Occurs?

There are two options that you can select from for when an error occurs while importing an import file. Let's take a look at them:

- » **Stop importing and display the error** - When an error occurs, ShipWorks will not move the file, but instead will stop importing and pop up a message to help you determine the cause of the error.
- » **Move the file and continue importing** - ShipWorks will not stop importing the file and will move the file to the Complete folder once finished. However, this may cause orders to be missed in ShipWorks since it skips the order or data that caused the error.

10. From the **If an error occurs while importing:** drop-down menu, select the option that works best for you. In this example, we are leaving the default to stop and display an error.

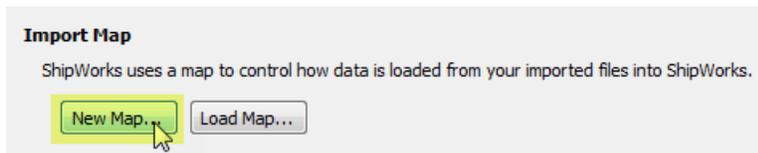


Nice job! We are now ready to select the actual import file and to begin the mapping process.

Creating the Import Map

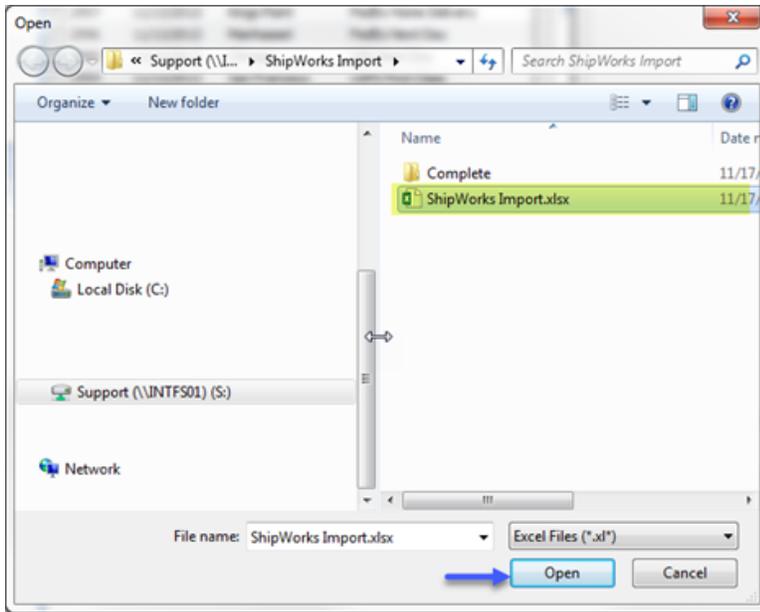
Now, we are going to point ShipWorks to the actual order file that we wish to use for mapping.

1. In the **Import Map** screen, click on the **New Map** button.



2. OK, now we have to navigate to and select a copy of the import file. So, click on **Browse**, navigate to your local copy of the import file you will use to create your mapping. Then, click **Open**.

PLEASE NOTE: You will need to have a copy of your order file available to you saved locally on your ShipWorks PC. You will not be pointing to the file in the FTP directory for mapping purposes. Instead, you will use a local copy of your order file.



3. After selecting the import file, ShipWorks will display the data found in the file so that you can be sure that it looks correct. By default, ShipWorks will look to the first row of an Excel file (row A) for the column headers. However, you can modify this if your headers are located on a row other than the first row of your spreadsheet or data source. Once the data is correct, click **Next**.

ShipWorks determined the following from your file and settings.

Column Name	Example 1	Example 2	Example 3
OrderNumber	6000	6001	6002
OrderDate	9/15/2016	9/15/2016	9/15/2016
ShippingMethod	FedEx Ground	FedEx Ground	UPS Ground
Notes	Thanks!	Please leave on ...	
ShippingCharge	4.00	4.00	4.00
Taxes	0.00	0.00	0.00
OnlineStatus			
PaymentReference	AmEx - XXXXX...	VISA - XXXX-9487	Mast - XXXX-6487
FirstName	Vicki	Marion	Tiffany
LastName	Ayala	Norton	Molina
Address1	5068 Main Str...	One Memorial Drive	4032 Locust Lane
City	Boston	St. Louis	Darien
State	Massachusetts	Missouri	Connecticut

Headers location: A1 (on 'Sheet1')

	A	B
1	OrderNumber	OrderDate
2	6000	9/15/2016
3	6001	9/15/2016
4	6002	9/15/2016
5	6003	9/15/2016

ShipWorks determined the following from your file and settings.

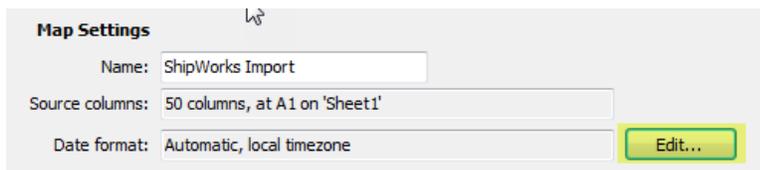
Column Name	Example 1	Example 2	Example 3
OrderNumber	6000	6001	6002
OrderDate	9/15/2016	9/15/2016	9/15/2016
ShippingMethod	FedEx Ground	FedEx Ground	UPS Ground

Mapping the Fields in the Import File to Fields in ShipWorks

If you have never mapped a file to an application or database before, it is super easy. What we will be doing is defining to ShipWorks exactly where ShipWorks should import your data to. For example, ShipWorks does not know that it should place the customer's first name into the First Name field. So, we are going to tell ShipWorks where to place our data.

NOTE: The only field that is required in ShipWorks to be mapped is the Order Number field. All other fields are optional. So, if you only have a few fields in your import file, this is totally OK. You can map only the fields that you need to.

Before we begin mapping, take a look at the Map Setting section. It gives you the File Name, source information and Date format information. If the Date format is not correct, you can click on the Edit button to manually configure the date and time settings.



Map Settings

Name: ShipWorks Import

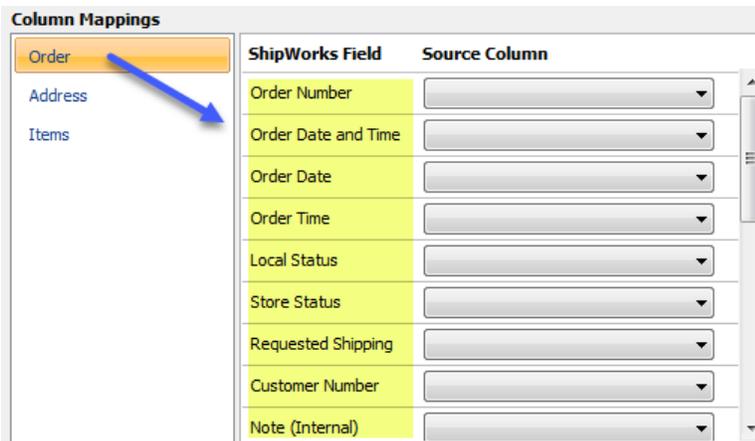
Source columns: 50 columns, at A1 on 'Sheet1'

Date format: Automatic, local timezone

Edit...

OK, let's begin mapping.

Notice that ShipWorks breaks the data down into 3 separate groups, **Orders**, **Address**, and **Items**. When you select one of the three groups, only the fields in ShipWorks that relate to this group are made available for mapping. This is done to help organize the mapping process.

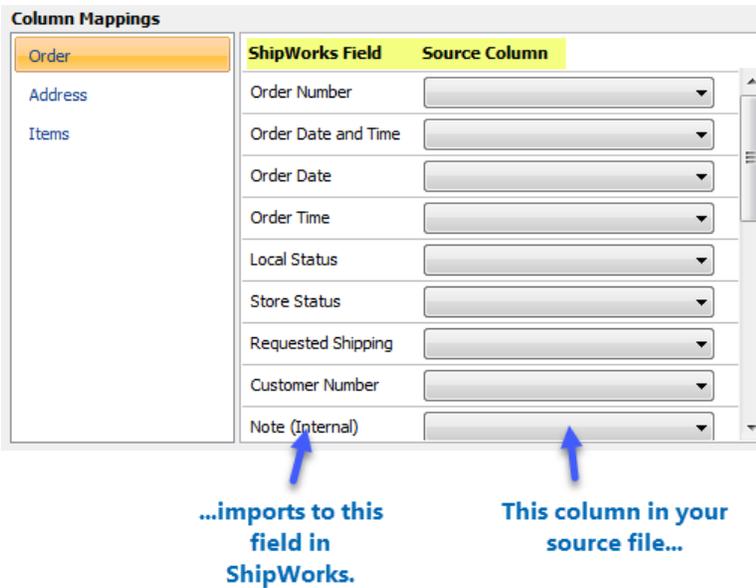


Column Mappings

Order
Address
Items

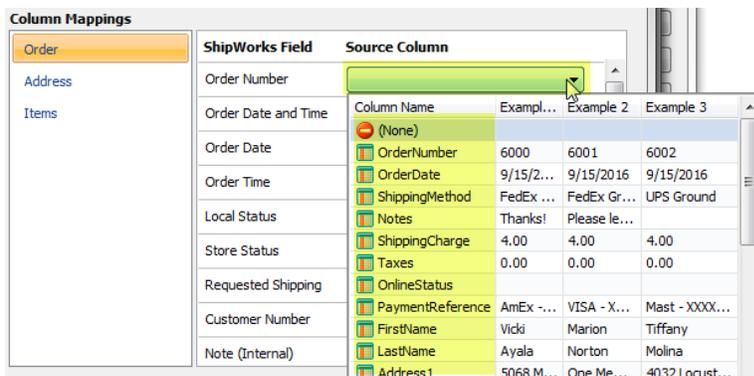
ShipWorks Field	Source Column
Order Number	
Order Date and Time	
Order Date	
Order Time	
Local Status	
Store Status	
Requested Shipping	
Customer Number	
Note (Internal)	

In addition, the **Column Mapping** screen is divided into two columns. The **ShipWorks Field** column lists the available fields in the ShipWorks database while the **Source Column** allows you to select from your import file what data should be imported into the ShipWorks Field.



We will not go through mapping every single field in our file. That would make this article really, really long. So, instead we will map two or three columns for each group so that you can see how it is done.

1. Select **Orders** from the **Column Mappings** screen. Now, let's map the **Order Number**. In the **Source Column** click the drop-down menu to the right of **Order Number**. A list of all of the available columns in your source file will be displayed along with examples of the data from your import file.



2a. Click on the **Column Name** that houses your order number data. Notice that the **OrderNumber** source column is now mapped to the **Order Number** field in ShipWorks. This means that when you import your orders, ShipWorks knows where to place the order number in its' database.

ShipWorks Field	Source Column
Order Number	OrderNumber

2b. Let's map one more column from the **Orders** group. Sometimes, you will need to map to a field in ShipWorks based upon how your input file is formatted. For example, you will notice that ShipWorks has an **Order Date and Time** field AND separate **Order Date** and **Order Time** fields. Our sample import file only has an order date so we will only use the **Order Date** field. However, if you have both the order date and the order time in the same column, you may wish to use the **Order Date and Time** field in ShipWorks.

ShipWorks Field	Source Column
Order Number	OrderNumber
Order Date and Time	
Order Date	
Order Time	
Local Status	
Store Status	

Column Name	Exempl...	Example 2	Example 3
OrderNumber	6000	6001	6002
OrderDate	9/15/2...	9/15/2016	9/15/2016
ShippingMethod	FedEx ...	FedEx Gr...	UPS Ground

2c. Continue mapping all of the **Order** fields in your import file to the fields available to you in ShipWorks.

3. Select the **Address** group on the **Column Mappings** screen. Notice that the ShipWorks Fields change to show only the fields that relate to address information.

Group	ShipWorks Field	Source Column
Order		
Address	Bill First Name	
	Bill Middle Name	
	Bill Last Name	
	Bill Full Name	
	Bill Company	
	Bill Address 1	
	Bill Address 2	
	Bill Address 3	
	Bill City	
Items		

Note: ShipWorks allows you to import both **Ship to** and **Bill to** address information. Neither are required. You can import one or the other or both.

3a. In our sample import file, we only have one address. So, we will map our address columns to the **Ship** to fields in ShipWorks. Map your address columns to the available fields in ShipWorks.

ShipWorks Field	Source Column																					
Bill Phone																						
Bill Fax																						
Bill Website																						
Ship First Name																						
Ship Middle Name	<table border="1"> <thead> <tr> <th>Column Name</th> <th>Exempl...</th> <th>Example 2</th> </tr> </thead> <tbody> <tr> <td>OnlineStatus</td> <td></td> <td></td> </tr> <tr> <td>PaymentReference</td> <td>AmEx -...</td> <td>VISA - X...</td> </tr> <tr> <td>FirstName</td> <td>Vicki</td> <td>Marion</td> </tr> <tr> <td>LastName</td> <td>Ayala</td> <td>Norton</td> </tr> <tr> <td>Address1</td> <td>5068 M...</td> <td>One Me...</td> </tr> <tr> <td>City</td> <td>Boston</td> <td>St. Louis</td> </tr> </tbody> </table>	Column Name	Exempl...	Example 2	OnlineStatus			PaymentReference	AmEx -...	VISA - X...	FirstName	Vicki	Marion	LastName	Ayala	Norton	Address1	5068 M...	One Me...	City	Boston	St. Louis
Column Name	Exempl...	Example 2																				
OnlineStatus																						
PaymentReference	AmEx -...	VISA - X...																				
FirstName	Vicki	Marion																				
LastName	Ayala	Norton																				
Address1	5068 M...	One Me...																				
City	Boston	St. Louis																				
Ship Last Name																						
Ship Full Name																						
Ship Company																						
Ship Address 1																						

Mapping the Ship First Name field

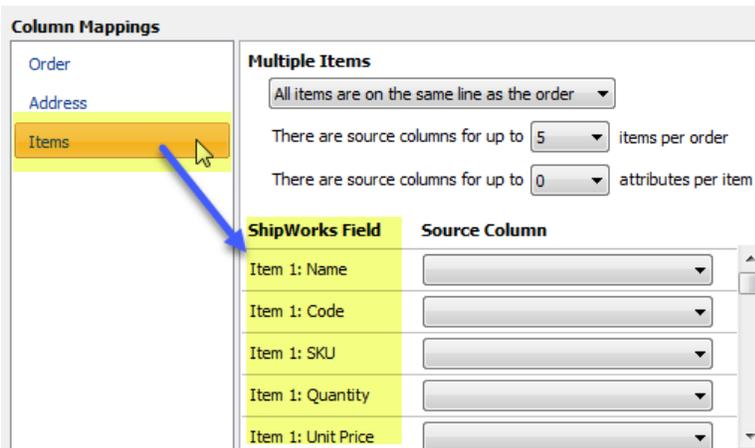
ShipWorks Field	Source Column												
Bill Phone													
Bill Fax													
Bill Website													
Ship First Name	FirstName												
Ship Middle Name													
Ship Last Name													
Ship Full Name	<table border="1"> <thead> <tr> <th>Column Name</th> <th>Exempl...</th> <th>Example 2</th> </tr> </thead> <tbody> <tr> <td>FirstName</td> <td>Vicki</td> <td>Marion</td> </tr> <tr> <td>LastName</td> <td>Ayala</td> <td>Norton</td> </tr> <tr> <td>Address1</td> <td>5068 M...</td> <td>One Me...</td> </tr> </tbody> </table>	Column Name	Exempl...	Example 2	FirstName	Vicki	Marion	LastName	Ayala	Norton	Address1	5068 M...	One Me...
Column Name	Exempl...	Example 2											
FirstName	Vicki	Marion											
LastName	Ayala	Norton											
Address1	5068 M...	One Me...											
Ship Company													
Ship Address 1													

Mapping the Ship Last Name field

ShipWorks Field	Source Column															
Ship Company																
Ship Address 1																
Ship Address 2	<table border="1"> <thead> <tr> <th>Column Name</th> <th>Exempl...</th> <th>Example 2</th> </tr> </thead> <tbody> <tr> <td>FirstName</td> <td>Vicki</td> <td>Marion</td> </tr> <tr> <td>LastName</td> <td>Ayala</td> <td>Norton</td> </tr> <tr> <td>Address1</td> <td>5068 M...</td> <td>One Me...</td> </tr> <tr> <td>City</td> <td>Boston</td> <td>St. Louis</td> </tr> </tbody> </table>	Column Name	Exempl...	Example 2	FirstName	Vicki	Marion	LastName	Ayala	Norton	Address1	5068 M...	One Me...	City	Boston	St. Louis
Column Name	Exempl...	Example 2														
FirstName	Vicki	Marion														
LastName	Ayala	Norton														
Address1	5068 M...	One Me...														
City	Boston	St. Louis														
Ship Address 3																
Ship City																

Mapping the Ship to Address1 field.

- Continue mapping the address columns from your import file to the available fields in ShipWorks.
- Select the **Items** group from the **Column Mappings** section. The screen changes to display only the ShipWorks fields related to items.

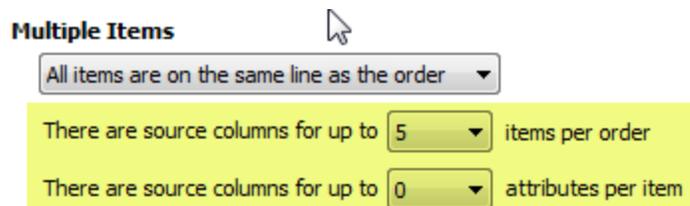


5. Make note of the Multiple Items section available to you now. You will use this section to define how the line items are listed in your import file. There are two options available to you. Let's take a look at both of these options.

» **All items are on the same line as the order** - If all of the items are listed on the same row as the order information in your input file, then this is the option for you. Here is an example:

S	T	U	V	W	X	Y	Z	AA	AB	AC
ItemName1	ItemCode1	ItemThumb1	ItemQty1	ItemPrice1	ItemWeight1	ItemStatus1	ItemName2	ItemCode2	ItemThumb2	ItemCode2
Green Hat	6000	C:\Users\Demo\Item\Thumb\Item_ThumbSportgreen hat.jpg	2	18.35	2	In Stock	Red T-Shirt	8000	C:\Users\Demo\Item\Thumb\Item_ThumbSportRed T-shirt.jpg	3
Red T-Shirt	8000	C:\Users\Demo\Item\Thumb\Item_ThumbSportRed T-shirt.jpg	1	12.85	3	In Stock				

With this option selected, you can select the max number of items you will need to map to ShipWorks and how many attributes are available for each item.



» **The order line is repeated for each item** - If your import file has a separate row for each line item on the order, this option is for you. Here is an example: Notice that the OrderNumber is repeated on each row indicating that the items belong to the same order.

S	T	U	V	W	X	Y
OrderNumber	ItemName	ItemCode	ItemThumb	ItemQty	ItemPrice	ItemStatus
6000	Green Hat	6000	C:\Users\Demo\Item\Thumb\Item_ThumbSportgreen hat.jpg	2	18.35	2 In Stock
6000	Red T-Shirt	8000	C:\Users\Demo\Item\Thumb\Item_ThumbSportRed T-shirt.jpg	3	12.85	3 In Stock

With this option selected you can specify what column of your input file identifies each order and the number of attributes associated to your items.

Multiple Items

The order line is repeated for each item

Column that uniquely identifies each order:
OrderNumber

There are source columns for up to 0 attributes per item

5a. Based upon the above examples, select the correct option for your import file. For this example, we will select the below options:

Column Mappings

Order
Address
Items

Multiple Items

All items are on the same line as the order

There are source columns for up to 2 items per order

There are source columns for up to 0 attributes per item

ShipWorks Field Source Column

5b. Map the appropriate columns from your import file to the correct fields in ShipWorks.

ShipWorks Field	Source Column												
Item 1: Name													
Item 1: Code	<table border="1"> <thead> <tr> <th>Column Name</th> <th>Exempl...</th> <th>Exan</th> </tr> </thead> <tbody> <tr> <td>PhoneNumber</td> <td>414-55...</td> <td>/81-</td> </tr> <tr> <td>ItemName1</td> <td>Green ...</td> <td>Black</td> </tr> <tr> <td>ItemCode1</td> <td>WCDN-HAT</td> <td>RI T...</td> </tr> </tbody> </table>	Column Name	Exempl...	Exan	PhoneNumber	414-55...	/81-	ItemName1	Green ...	Black	ItemCode1	WCDN-HAT	RI T...
Column Name	Exempl...	Exan											
PhoneNumber	414-55...	/81-											
ItemName1	Green ...	Black											
ItemCode1	WCDN-HAT	RI T...											
Item 1: SKU													

ShipWorks Field	Source Column
Item 1: Name	ItemName 1
Item 1: Code	
Item 1: SKU	
Item 1: Quantity	
Item 1: Unit Price	

Column Name	Exempl...	Examp
ItemName 1	Green ...	Black 1
ItemCode1	GRN-HAT	BLT-1
ItemThumb1	C:\Use...	C:\Use
ItemQty1	2	1
ItemPrice1	10.25	10.25

6. When you have completed mapping all of your Order, Address, and Item fields, click **Next**.

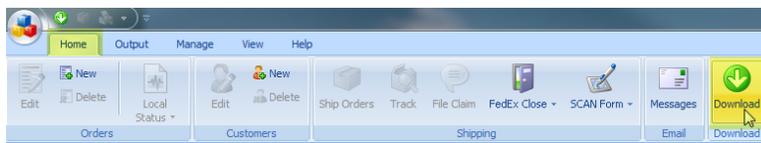
Congratulations! You have completed the Generic File setup!

7. Click **Finish**. Then, click **Close**.

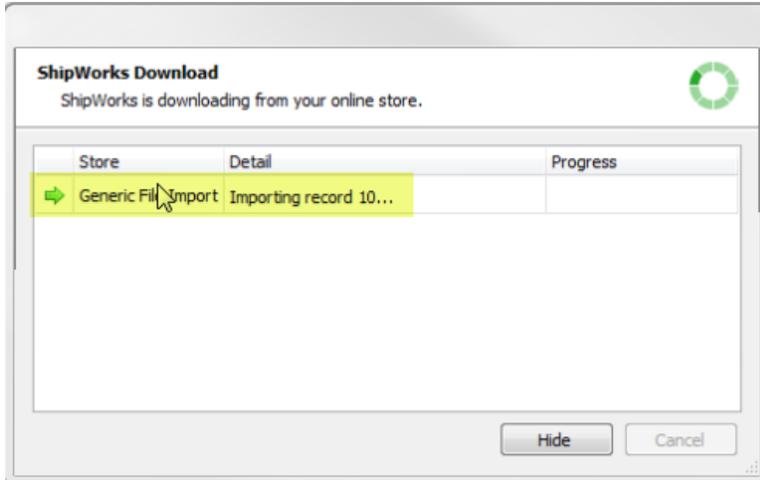
Test Your Mapping

Once you have completed your Generic File setup you will be able to import the orders from your input file. To test your setup:

1. Ensure that your import file is placed into the ShipWorks import folder that you created in the above steps.
2. In ShipWorks, go to the **Home** tab and then click on the **Download** button.



If all goes well you will see your orders being imported into the ShipWorks software.



You will also notice that the import file was moved from the ShipWorks Import folder into the Complete folder you created in the steps above. It will also be appended with the date and time that it was imported into ShipWorks.

Name	Date modified	Type	Size
ShipWorks Import [2016-11-17 13.19.56].x...	11/17/2016 8:57 AM	Microsoft Excel W...	14 KB

Still Need Help?

Please feel free to [reach out to one of our awesome Customer Care representatives in St. Louis](#). We are happy to assist you.

Sample File



Click the image to download the sample Import File