

Reference Guide

Automating Amazon Tracking Updates



Automating Amazon Tracking Updates

TABLE OF CONTENTS

Background Creating the Filter Creating the Action Still Need Help?

Background

Amazon, by default, processes tracking information in a batch rather than as each order is processed. Because of this, there have been times that a customer sees that an order has been processed and can't see the tracking information. To alleviate this issue, we can set up a filter and action to push the tracking information for processed Amazon orders to your store every hour (or another time interval you prefer).

Automating this tracking information upload is a two-step process:

- >> First, you create a filter to capture all the desired orders.
- >> Then, you create an Action to upload shipment details for all orders within that filter at a specified time interval.

Creating the Filter

1. Click Manage > Filters.



2. Click the New Filter button.



Filter Organizer	
Filter Organizer	Edit Edit Edit Edit Edit Edit Edit Delete Add Mew Filter Copy Create Link Move Move Up Move Down Move Into Folder Sort v
Show disabled filters	Close

3. Name the Filter, then click Next.





4. Click the "Add Condition" button to begin building the Filter.

Add	Filter Wizard	×
1	Filter Condition Configure the condition that determines the filter contents.	
×	If All of the following conditions are met	
×	Click the 'Add Condition' button to add a new condition.	
	Add Condition	
	< Back Next > Car	icel

5. Now, let's add the first two conditions to the filter. Together, the conditions will ensure that the filter grabs orders that have a local status of shipped and that the Amazon order status is still showing unshipped. Here's how:



5.1 Click on the add condition button. (This button is located at the top of the Filter Condition screen and looks like this \odot .)



5.2 You will now have a new condition that reads Order Total Equals \$0.00. We need to change this condition so that it says Local Status Equals Shipped. Here's how:

Click on the blue link Order Total and select Order > Local Status.

Filter Condition

Configure the condition that determines the filter contents.



» Now, to the right of Equals, click the drop-down menu and select Shipped.



Add	Add Filter Wizard					
I	Filter Condition Configure the condit	ion that (determines the filter contents.			
ж	If <u>All</u> of the following	condition	ns are met 📲 🚱			
×	Local Status	Equals		-		
			Backordered Canceled In Process New Order Not Shipped Shipped			

Awesome!! You have the first of the 2 conditions. Let's add the second.

5.3 Click the Add Condition button again. The same one you clicked in step 5.1 above. 📀

5.4 Ok, now you have another line that reads Order Total Equals \$0.00. We are going to change this one too. Here's how:

Click on Order Total and select Order > Store Status.

Add Filter Wizard			
Filter Condition Configure the condition that	determines the	filter c	contents.
If <u>All</u> of the following condition	ns are met 🛛 🗬	0	
Local Status Equals	Shipped		•
Crder Total Equals	\$0.00		
Order	<u> </u>		Number
Person	•		Date
Store	•		Total
Counts	•		Requested Shipping
Customer			Total Weight
If the custome	r		ShipSense Status
Contents			Local Status
For every	•		Store Status
For any			Emailed With
Number of	•		Printed With
Condition Group			Entry Method
The combined	result of	-	Lind y included



» Now, click in the white field to the right of Equals and type in unshipped.

Add	Filter Wizard
F	ilter Condition Configure the condition that determines the filter contents.
ж	If All of the following conditions are met 🛛 📲 🚱
×	Local Status Equals Shipped
×	Store Status Equals Unshipped

Great! Now we need to be sure that we are grabbing orders that we actually shipped in ShipWorks. Here's how we do it:

6. Click the branching icon to add an "And" branch to the filter conditions. It is the little button at the top of the Fil-

ter Conditions screen that looks like this 📲 .

Filter Editor	×
Filter Name: AmazonTrackingUpdate	
Enabled: 🔽	
Applies To: 🛐 Orders	
Condition Grid Columns	
X If All of the following conditions are met	
Local Status Equals Shipped V	
X Online Status Equals unshipped Insert Branch	
M And	

7. Notice how you now have an And right underneath the first two conditions we added? Click the new Add Condition button located under the And.

I	Filter Condition
	Configure the condition that determines the filter contents.
×	If All of the following conditions are met 🛛 🖷 🚱
×	Local Status Equals Shipped -
×	Store Status Equals Unshipped -
×	And
×	If All of the following conditions are met 🛛 📲 🙆
ж	Click the 'Add Condition' button to add a new condition.
	Add Condition

7.1 Perfect! Now you have another line that reads Order Total Equals \$0.00. Let's change this one too.



Click on Oi	rder Total and	select For	Any > Sh	ipment.
-------------	----------------	------------	----------	---------

×	And								
×		If <u>All</u> of	the fo	llowing conditio	ns are met		0		
×			Orde	<mark>r Total</mark> Equals	\$0.00				
			Ord	ler					
				Order		•			
				Person		•			
				Store		•			
				Counts		•			
			Cu	stomer					
				If the custom	er				
			Со	ntents					
				For every		•			
				For any		•		Item	
				Number of		۲		Charge	
			Со	ndition Group				Shipment	N
				The combined	result of			Payment	w
A-1	-			Shipped	UP	S N		Email	
								Print	

There is now another line that says For any shipment in the order and, right under that, another Add Condition button. Click that button.

×	And	
×		If All of the following conditions are met 🛛 📲 🔇
×		For any shipment in the order
Ж		If <u>All</u> of the following conditions are met 🛛 📲 💽
ж		Click the 'Add Condition' button to add a new condition.

» Now you have a line that reads Provider Equals None. Click on Provider and select Processed Status.



	is are met 📲 😈
For any shipment in t	ne order
If <u>All</u> of the f	ollowing conditions are met 🛛 📲 🌾
Provi	der Equals None
50	ipment
	Provider
	ShipSense
	Ship To
	Ship Date
	Weight
	Insured By
	ShipWorks Insurance
	Processed Status
	Processed Date

» Lastly, click on None and select Processed from the drop-down menu.

~	11 All of the following conditions are met 📲 😈
×	For any shipment in the order
×	If All of the following conditions are met 🛛 📲 🚱
×	Processed Status Equals Not Processed
	Not Processed Processed
	Voided

8. Good job. Your filter conditions should look like the screenshot below. Click Next.





9. The Grid Columns screen allows you to specify the grid columns you wish to be visible when you select this filter. It is not required, but if you wish you can modify these columns. Click Finish.

My Settings Default	umns to Use Use the columns of the parent folder. Use this filter's own column settings. umn Order and Visibility
	Order # Move Up Date ShipSense Qty Item Name Item Location Notes Local Status Requested Shipping S: Type S: First Name S: Last Name S: Country et
	S: Last Name S: Country et Reset to Default

Nice. You now have a filter catching any orders that you shipped in ShipWorks but did not get updated on Amazon. Next, let's create the action that will send updates telling Amazon to mark these orders as shipped and update the tracking numbers.

Creating the Action

1. Click Manage > Actions.



2. Click the New Action button.



Action Name	Run When	Tasks	Edit	
🗸 🎲 Delete Old Data	A scheduled time	Delete old data	12	Edit
🗸 🎲 Print Invoice	A shipment is processed	Print		D
🗸 🎲 Send Email	A shipment is processed	Email	ABC	Rename
			×	Delete
			Add	
			4	New Action
				45

3. Enter a name for the action.

Action Editor	
Name AmazonTrackingInfoUpdate	
Action When the following occurs:	

4. Now, let's tell ShipWorks how often to send updates. In this example we will set it for every hour.

4.1 Under When the following occurs: click on the drop-down menu and select A scheduled time.

Action Editor Name Amazon Tra	cking Info Update	
Action	When the following occurs: An order is downloaded	-
Setungs	An order is downloaded A download finishes A shipment is processed Ru A shipment is voided A filter's content changes A scheduled time A custom button is clickeds	the firs

4.2 To the right of Run this action: click on the blue link for One Time and select Hourly from the drop-down menu.



When	the fo	llowing	occu	rs:	
A scheduled time 🔹					
	Run this	s action:	One	Time	_
	Start:	9/20/20		One Time	
Run t	hese ta	sks:		Hourly N	
🕂 Add Task 🔹			Daily	1	
			Weekly	L	
				Monthly	L
	Add Task	. •		Weekly Monthly	

4.3 Leave the Start and End times set to the default settings. If you wish, you can change the number of hours ShipWorks waits before sending the updates again.



- 5. ShipWorks now knows how often to perform the Action, but we still need to tell it what to do every hour.
- 5.1 Under Run these tasks: click the Add Task button and select Amazon > Upload Shipment details.





6. Now, choose the filter you just created so that the task says "Upload the tracking number for The shipments of everything in AmazonTrackingUpdate" (or whatever you named your filter earlier).



Action Editor	n in the second s
AmazonTrac	kinginfoUpdate 11
Action Settings	When the following occurs: A scheduled time Run this action: Hourly Start: 5/27/2015 Start: 5/27/2015 End: Never On 5/27/2015 Run every: In:13 AM Run every: In:13 AM
	Upload shipment details (Interapptive Amazon) Generating number for: The shipment's of everything in AmazonTrading Quick Filter Quick Filter
	Greate Create Add Task ■ Add Task ■ Orders (6,580) ■ ¬ ¬ AmazonTrackingUpdate (i ¬ ¬ PUPS End of Day (i)
	

7. Click OK, and then Close, and you're done.

Still Need Help?

Please feel free to <u>reach out to one of our awesome Customer Care representatives in St. Louis</u>. We are happy to assist you.

