

Automating a Daily Upload of an Inventory Data File from a Windows PC or Server

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Overview

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Automating the transfer and upload of your company’s inventory data “snapshot” file to the WarehouseTWO FTP server is “best practice”. Benefits include:

- ✓ *Higher reliability of having your inventory data posted to your account, as opposed to having someone perform the upload manually. Experience shows us that those who post their inventory data manually don’t post their inventory data consistently.*
- ✓ *Better placement of your items in the **SEARCH** result screen. (Search results are default-sorted by part number, and then by decreasing posted date, with the most recent postings appearing at the top.)*
- ✓ *Significant reduction in labor. Once the automated process is set up correctly, no additional work is required to ensure that your data is always posted to your account.*

This tutorial assumes that you have already created a scheduled process to export inventory data from your company’s ERP system and format it into an acceptable inventory data file, and that this file resides on a Windows PC/server that is always on and always connected to the internet. Refer to our [POST INVENTORY tutorial](#) for details on acceptable inventory data file types and data content format.

Your FTP Account

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Transferring your inventory data file to the WarehouseTWO server via FTP requires that you have an FTP account created in our system. This account is different from a user account for our web site. When registering a premium level (2 or higher) member account with us, click on the box to the left of the text “Request FTP Access” in step 5 of the registration process (Figure 1).

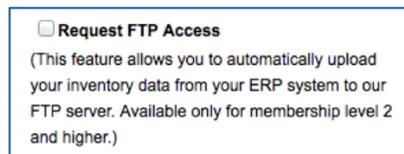


Figure 1: Request FTP Access Box Box

Your assigned FTP UserName and FTP Password are always displayed on the **Member Information** tab in the **Account Settings** section of our web site (Figure 2), accessible by account administrators. If no FTP account information is displayed here, [contact us](#) to request that we create an FTP account for you.

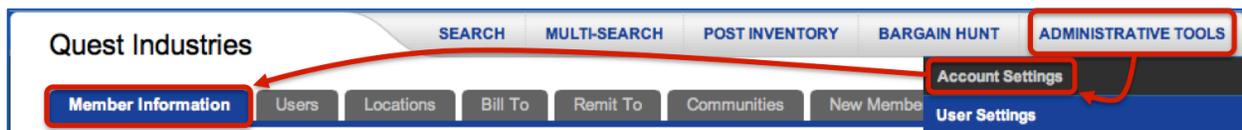


Figure 2: Member Information Tab in Account Settings

Downloading and Installing “WinSCP”

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Uploading your company’s inventory data file to WarehouseTWO’s FTP server requires a secured connection via FTPS (Explicit) protocol. Microsoft Windows’ built-in FTP client does not support FTPS. This document describes how to set up an automated file upload event, using the free FTPS client application for Windows, [WinSCP](#).

Per its web site, “[WinSCP](#) is an open source free SFTP client, SCP client, FTPS client and FTP client for Windows. Its main function is file transfer between a local and a remote computer. Beyond this, WinSCP offers scripting and basic file manager functionality.” We recommend this application because it is free, open-source and secure. This application runs on Windows XP SP2 and newer versions of Windows for PCs, and on Windows Server 2008 SP1 and newer versions of Windows Server for servers. The instructions in this tutorial are for use with WinSCP. Instructions and commands may be different for other FTP client applications.

[Click here to download the WinSCP application](#). Double-click the downloaded file “winscp517setup.exe” to install it. (You may have to “unzip” it first.) We suggest that you install it to a folder named “winscp” (Likely paths: C:\Program Files\winscp or C:\Program Files (x86)\winscp). [Click here to learn more about Windows Program File folders](#). Upon completion, two applications will be installed: “WinSCP.exe” (graphical user interface, “GUI”, version) and “WinSCP.com” (DOS-like command line entry interface version). Any “shortcut” created during installation will most likely point to the GUI version.

Testing: Data File, Internet Connection, FTP Account

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Prior to attempting to automating your inventory data file transfer, first verify that your inventory data file is properly formatted, that your PC/server is connection to the internet and that your FTP account information is valid.

Part I: Test an Inventory Data File

Using an administrative user account, manually upload an inventory data test file to your account via the **POST INVENTORY** functionality at the WarehouseTWO web site. (Consider deleting any previously posted inventory data prior to manually uploading your test file.) Once you have verified that the test file uploads successfully, delete all inventory data posted to your account. Refer to our [POST INVENTORY tutorial](#) for details on how to manually upload an inventory data file and delete all posted data.

Part II: Manually Transfer an Inventory Data File via FTP

Using WinSCP, manually connect to the WarehouseTWO FTP server and push a test inventory data file:

Step #1: Launch the WinSCP.exe application. The “Session” window will appear (Figure 3).

Step #2: For “File protocol:”, select **FTP**. For “Encryption:”, select **TLS/SSL Explicit encryption**. For “Host name:”, enter **ftp.warehousetwo.com**. For “User name:” and “Password:”, enter the WarehouseTWO FTP account information assigned to you. When these fields are set correctly, the “Login” button will become active.

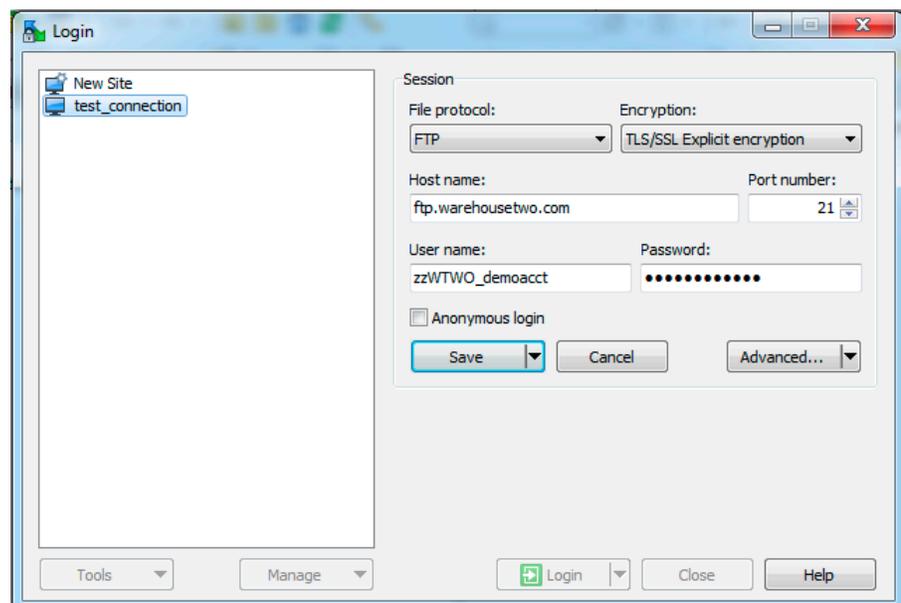


Figure 3: WinSCP graphical user interface window.

Step #3: Click on the “Login” button to connect to the WarehouseTWO FTP server.

If the FTP connection is successfully established, the WinSCP control panel (Figure 4) will appear. The left-hand directory represents your PC/server; the right-hand directory represents the sub-directory on the WarehouseTWO FTP server assigned to your account.

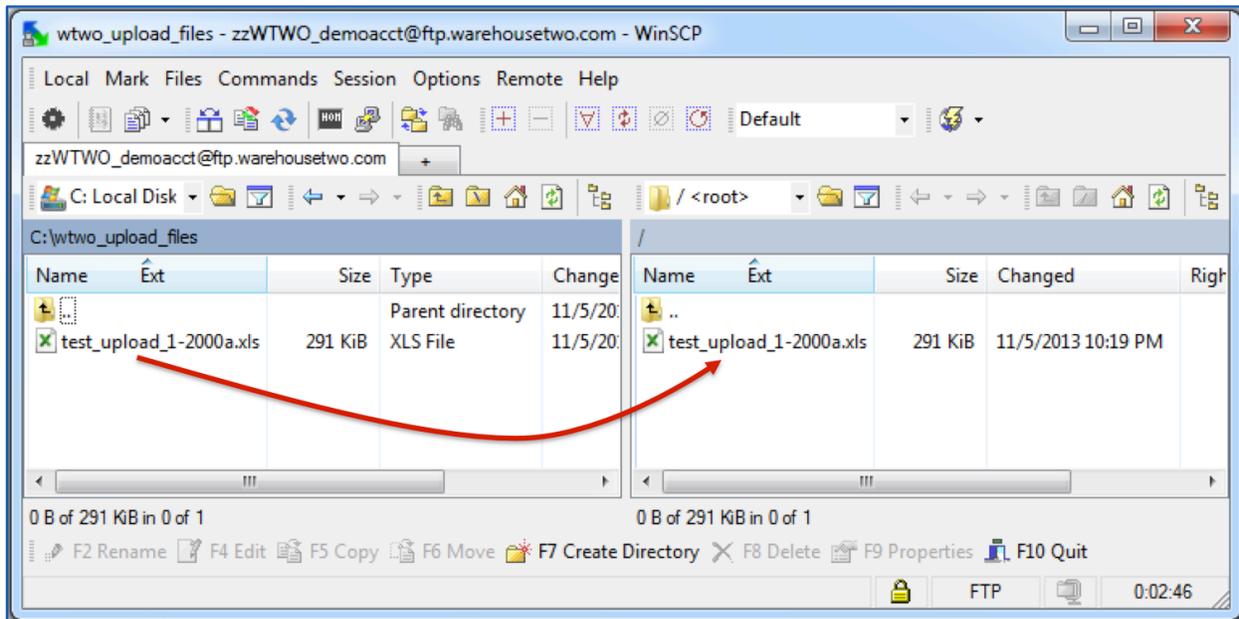


Figure 4: WinSCP control panel.

Step #4: Using the on-screen tools, browse your PC/server files until your inventory data test file appears. Then, drag the file to anywhere in the right-hand directory (red arrow in Figure 4).

Step #5: Close the WinSCP control panel (Figure 4). Within ten minutes, the transferred file will be processed and then deleted from your account’s sub-directory on the WarehouseTWO FTP server. After ten minutes, log into the WarehouseTWO web site and verify that the file was uploaded successfully.

Creating the Transfer Script

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The automated file transfer process requires that a script file be created and stored on the PC/server that will perform the daily file transfer (Figure 5). Use Windows’ “Notepad” application to create this script file. When naming this file, we recommend that the file name have no spaces or special characters. The file extension must be “.txt”. The text file must contain the following text:

```
option batch abort
option confirm off
open "ftp://<username>:<password>@ftp.warehouse2wo.com" -explicitssl -
certificate="70:d3:f1:b1:b9:89:37:e6:8d:46:c9:2c:a9:66:f3:59:ee:d6:bb:
81:97:16:f6:98:7d:6c:40:15:c6:94:09:2d"
lcd c:\<path\folder>
put *.*
close
exit
```

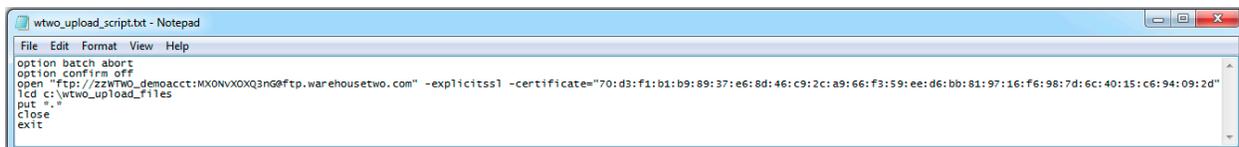


Figure 5: Script file contents.

As shown in figure 5, there are actually only seven (7) lines of text in this text file: there is no carriage return after the third line (**-explicitssl -**). (The third line of text in the script shown above in blue font is simply wrapping on this page.)

In your script file, replace the text **<username>** with your assigned FTP user name and the text **<password>** with your assigned FTP password. Replace the text **c:<path\folder>** with the directory path to where your inventory data file will reside on your PC/server (such as **c:\wtwo_upload_files**).

We recommend that the file be saved in a folder on the root level of the C: drive (such as **c:\wtwo_script**), and that the contents of that folder be only your inventory data file(s). If this is the case, then the script line **put *.*** is appropriate. If your inventory data file resides in a folder that contains other files, then replace ***.*** with the exact name of your inventory data file (such as **wtwo_file.txt**).

Creating and Testing the File Transfer Scheduled Task [Back to Contents](#)

To schedule the script to run, thereby sending your inventory data file to WarehouseTWO's FTP server, use Windows' "Task Scheduler". This application should be already installed on your PC/server. [Click here to learn more about "Task Scheduler"](#).

To create the required scheduled task, follow these steps:

Step #1: From the **Start** menu on your PC/server, select **Control Panel**, then **System and Security**, and then **Administrative Tools**. Within the **Administrative Tools** folder, double-click on the **Task Scheduler** icon/shortcut. The **Task Scheduler** application window will open.

Step #2: In the right-hand panel of the **Task Scheduler** application window, click on **Create Basic Task...** The **Create Basic Task Wizard** window will appear.

Step #3: On the **Create a Basic Task** pane (Figure 6), enter a name (and optional description for your task). Then click the **Next** button.

Step #4: On the **Task Trigger** pane, select **Daily** (if not already selected). Then click the **Next** button.

Step #5: On the **Daily** pane, accept the default start date (today?). Select a desired start time. This time should be at least some time shortly after your inventory data file has been created (by some other scheduled process). See item #2 in the [Tips and Tricks](#) section in this document for suggested start times. Accept the value of **1 days** for the field **Recur every**:. Then click the **Next** button.

Step #6: On the **Action** pane, accept the default selection, **Start a**

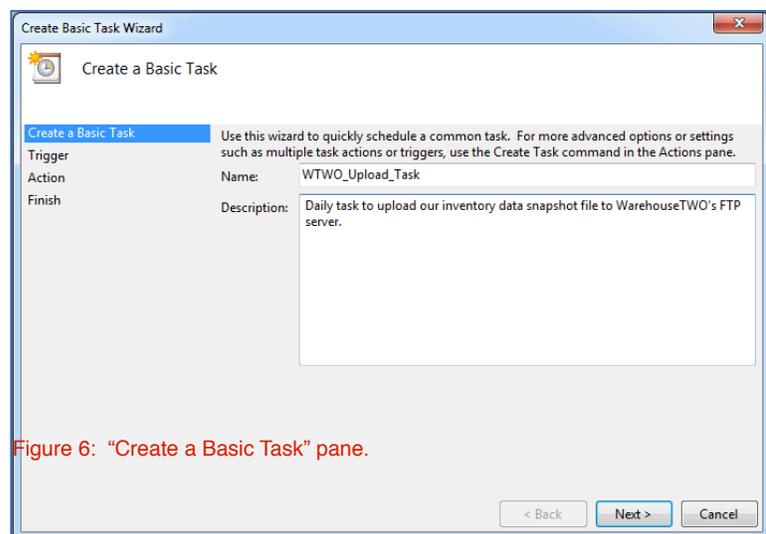


Figure 6: "Create a Basic Task" pane.

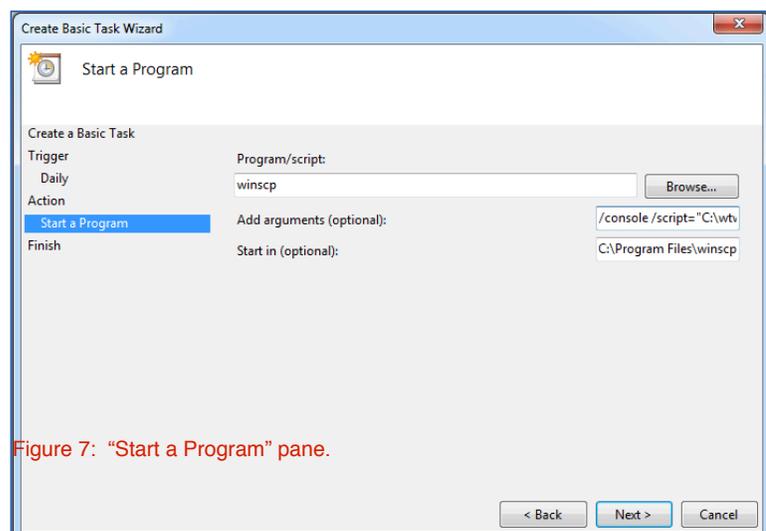


Figure 7: "Start a Program" pane.

program. Then click the **Next** button.

Step #7: On the **Start a Program** pane (Figure 7), enter **winscp** into the **Program/script:** field.

Step #8: In the **Add arguments (optional):** field, enter this text string as one line, no carriage return:

```
/console /script="C:\<path\folder>\<script_name>" /log="C:\<path\folder>\wtwo_upload_log.txt"
```

In the above text, replace **C:\path\folder>** with the directory path where your script file resides (such as **c:\wtwo_script**). A log file named **wtwo_upload_log.txt** will be created in this same folder, and appended each time your task runs. Replace **<script_name>** with the name of the your transfer script file ([created above](#)).

Step #9: In the Start in (optional): field, enter this string as one line:

```
C:\Program Files\winscp
```

The above string assumes that the **WinSCP** application indeed was installed into a folder named **winscp** in the **Program Files** folder on the root level of the **C:** drive. If this is not the case, then edit the above string to correctly show the path to the **WinSCP** application. Then click on the Next button.

Step #10: On the **Finish** pane, click the **Finish** button. Doing so will close the Create Basic Task Wizard and return you to the Task Scheduler application window.

To verify that your task and script file have been created correctly, delete all inventory data posted to your account. Refer to our [POST INVENTORY tutorial](#) for details on how to manually delete all posted data. Then manually run the task. In the left-hand pane of the **Task Scheduler** application window (Figure 8), click on **Task Scheduler Library**. In the center pane, click on the task that you created. In the right-hand pane, click on **Run**. A small black window should open, display scrolling lines of text, and then close. Depending on your user rights on your PC/server, you may be able to view the history pane, which will show if the task was completed successfully. After ten minutes, log into the WarehouseTWO web site and verify that the file was uploaded successfully.

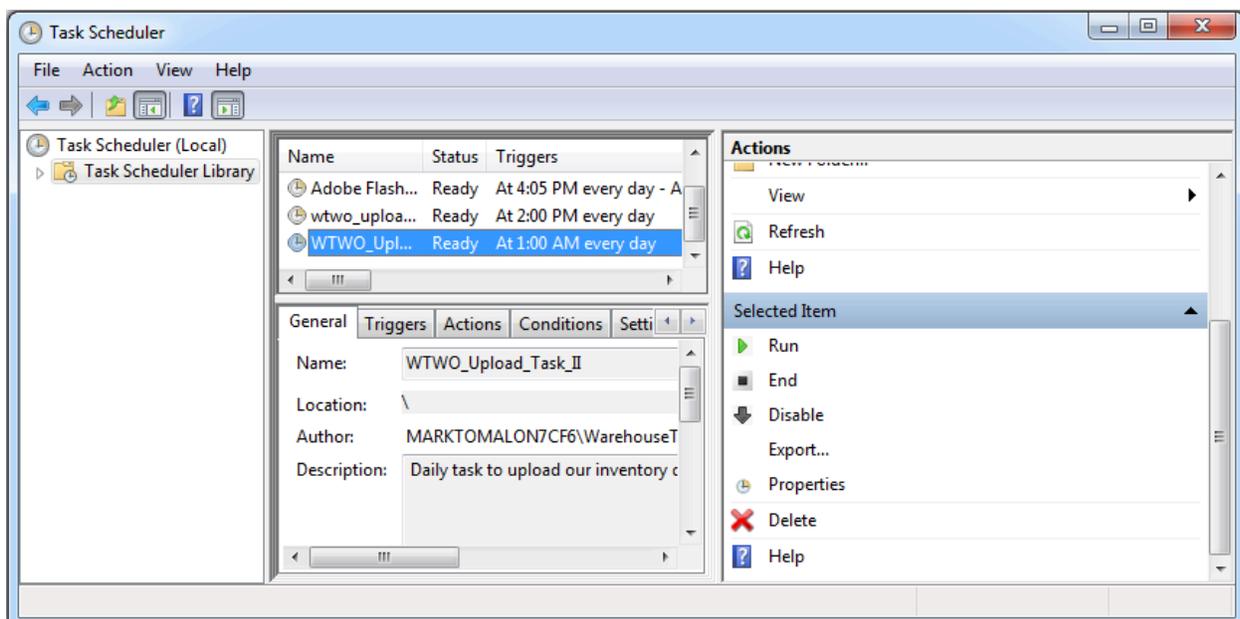


Figure 8: Task Scheduler application window.

Tips and Tricks

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1. Refer to our [POST INVENTORY tutorial](#) for detailed information on acceptable inventory data file types and data content format.

2. Verify that your IT infrastructure/firewall allows a connection to WarehouseTWO's server IP address, ports 21 and 5000-5100. [Contact us](#) for our current IP address.
3. Schedule your file transfer for anytime between 02:10 GMT (9:10 pm EST or 10:10pm EDT in the Americas) and 06:50 GMT (1:50 am EST or 2:50 EDT in the Americas). Posting during this time period will ensure that your data appears with the current date during the entire (next) business day. Thus, your items will appear higher in search results and your postings will be more credible to potential buyers. Also, WarehouseTWO members who export inventory data from our system for importing into their ERP systems just prior to the start of business in North America will capture your freshest data.
4. Post your inventory data file seven days per week. Even if your data does not change between Friday evening and Monday morning, your items will appear higher in search results and your postings will be more credible to potential buyers.
5. If uploading an inventory data file every day, every weekday or once per week, set your location's (or multiple locations') inventory data expiration period(s) to "After 30 Days" and check the box on each location record labeled, "Auto-Delete Unrefreshed Records". If this check box is not available at your subscription level, then set your location's inventory data expiration period to "After 7 Days". (Longer inventory data expiration periods are intended only for members who post their inventory data files manually and/or less frequently than weekly.)

Got a Question?

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Got a question about this procedure? Let us help:

- a) [Email us](#).
- b) Call us at 650.329.1592.
- c) Post your question to our [LinkedIn](#) group, [WarehouseTWO Users Forum](#).