smartOCI™
User Guide
Secure FTP for Catalog Loads

Guide Contents

FTP User Account

You will receive your unique username and password in separate emails after your FTP user account is created.

The protocol that is used, (FTP w/TLS; SFTP) has no bearing on your user credentials.

Your user information will work for any of the protocols.

FTP Server Access

smartOCI offers three flavors of FTP for maximum flexibility and versatility.

SFTP

If your company has the ability to support the SFTP protocol, this will be your most secure method of transmission. To access the smartOCI SFTP server, use the URL: **sftp://suppliers.smartoci.com** in your preferred FTP client.

Filezilla Example:
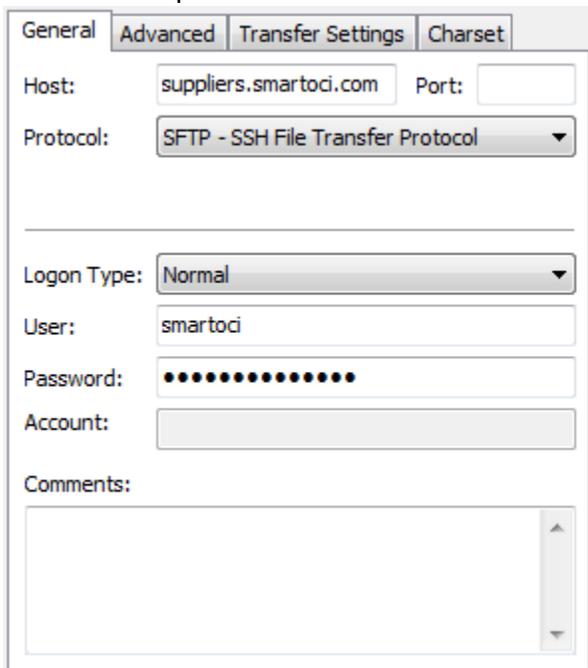
FTP – with TLS encryption

If your company does not support the SFTP protocol, you may use the FTP variant with TLS encryption.

To access the smartOCI FTP server with this option, use the URL: **ftp://suppliers.smartoci.com** in your preferred FTP client or application.

Ensure that you configure your FTP client to use (require) SSL/TLS encryption when using this option.

FileZilla Example:

Accessing Your FTP Directory
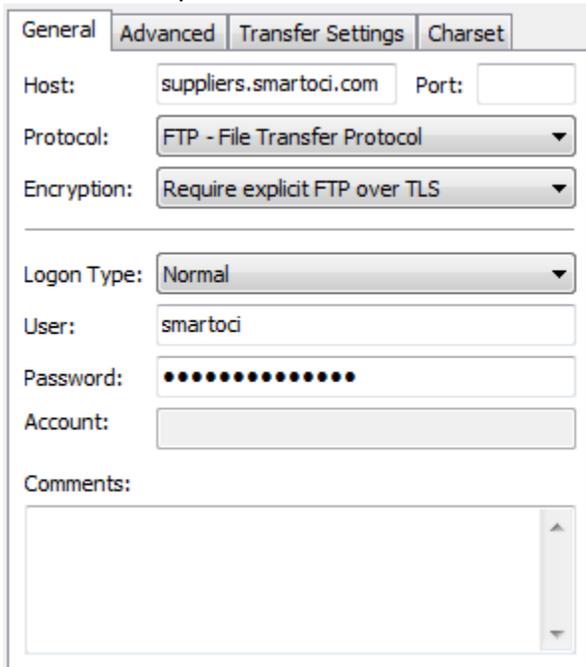
In your favorite FTP program, create a new FTP site. The below example will be done using Mozilla's FileZilla FTP client and connecting using 'Explicit FTP over TLS'.

To connect with Filezilla, setup the site like this:

Host: suppliers.smartoci.com
Port: blank or you may specify 21
Protocol: FTP
Encryption: Require explicit FTP over TLS
Logon Type: Normal
User: your username
PW: your password

Upon your first connection, you may be prompted to accept our FTP server's secure certificate. If you see this prompt, please accept the certificate otherwise you will not be able to interact with the FTP server.

Account Directories

Once you are successfully authenticated and logged into the FTP server, you will be taken to your home directory with 2 directories that you may post files to, 'test' and 'production.' Please note that the only directories that you may interact with are your 'test' and 'production' folders.

'Test' – This directory is where you will place catalog files for loading into your client's test environment.

'Production' – This directory is where you will place your catalog files for loading into your client's production environment.

| test | File folder |
| production | File folder |

Accepted File Formats

The acceptable file formats to post to your FTP Directory are:
1. CSV – This is a comma separated values file. The posted file must follow the template convention including the column header names.
2. TSV – This is a 'tab separated values' file. The file must contain the proper column header names following the smartOCI
3. XLSX – This is a Microsoft Excel file format. The Excel file must follow the available template, including the proper header names.

File Naming Convention

The file naming convention for your catalog load files should follow the following format:
CATALOG NAME_{COMPANY CODE}.EXTENSION

1. Catalog Name – this portion of the file name will be the name of the catalog that will display to the buying organization.
2. Company Code – this is the 'company code' of the buying organization you wish your catalog load file to be posted to.
3. Extension – the file extension should match one of the accepted file formats cited above.

Posting Files

Once your catalog file is posted to the FTP server, smartOCI will pick up the file and process it to the designated buying organization's environment. If there are errors along the way, you will be notified.

If you are required to post several files for one buying organization, you simply load the separate files, each with different names.

Updating Files

When updating catalog files, all available items must be represented in the file. Your catalog file must be named the same as the catalog you wish to update. If the catalog names are different, then a separate catalog will be created.