

WTS Recipient CSV File Formatting



Uploading a recipient file into WTS not only saves countless hours of time but adds convenience to updating and maintaining current recipients as well. This document explains the formatting of the recipient file for proper import into WTS.

Notes:

- **The absolute minimum amount of information is Name (or Firstname and Lastname) and Location – every file *must* include this.**
- Customer will provide the csv file in the proper formats, excluding 'custom'.
- The file extension for the recipient file *must* be csv.
- All columns of data must have the proper header – incorrect or blank headers will be ignored upon import.
- Manual or auto-import will use the same formatting.
- There is no limit to the number of times per day that a manual import can occur.
- Auto-import only occurs once a day.
- ID is highly recommended but not required – ID ensures all names will import.

File Formats:

There are four file formats available depending on the amount of information and whether routing will be utilized.

1. [Basic](#) (click link to access file)
2. [Intermediate – Non-routing](#) (click link to access file)
3. [Intermediate – Routing](#) (click link to access file)
4. [Custom](#) (click link to access file)

Basic – A very simple file format that includes only the minimum for package tracking

Intermediate – Non-routing – Includes the minimum requirements plus additional fields such as departments, cost center, mailbox, and badge ID

Intermediate – Routing – Same as with Non-routing but includes the columns related to creating routes within WTS.

Custom – All available fields and Neopost Pro Services will format the file for proper import

WTS Recipient CSV File Formatting

This document explains the usage of headers and corresponds with the 'Basic' csv template.

****Headers are required and must remain *exactly* as formatted (capital letters, no spaces, etc.)**

Header	Explanation
ID	Recommended but not required. ID is used internally by the database to discern if there are duplicate recipient names and treat them as separate recipients.
Lastname	Last name of the recipient
Firstname	First name of the recipient
Or*	
Name	The full name of the recipient with the first name and last name separated by a space.
Location	The recipient's location (i.e. Room 123 or Desk 7 or Admin Dept)

* When using names, *either* Firstname and Lastname are used *or* Name is used. If a recipient has a middle name/initial, add this to the Firstname or include in the full Name.

Naming Examples –

Recipient	Lastname, Firstname	Or	Name						
Tom Jones	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Lastname</td> <td style="padding: 2px;">Firstname</td> </tr> <tr> <td style="padding: 2px;">Jones</td> <td style="padding: 2px;">Tom</td> </tr> </table>		Lastname	Firstname	Jones	Tom	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Name</td> </tr> <tr> <td style="padding: 2px;">Tom Jones</td> </tr> </table>	Name	Tom Jones
Lastname	Firstname								
Jones	Tom								
Name									
Tom Jones									
Bridgett Smith	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Lastname</td> <td style="padding: 2px;">Firstname</td> </tr> <tr> <td style="padding: 2px;">Smith</td> <td style="padding: 2px;">Bridgett</td> </tr> </table>	Lastname	Firstname	Smith	Bridgett	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Name</td> </tr> <tr> <td style="padding: 2px;">Bridgett Smith</td> </tr> </table>	Name	Bridgett Smith	
Lastname	Firstname								
Smith	Bridgett								
Name									
Bridgett Smith									
Robert J Johnson	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Lastname</td> <td style="padding: 2px;">Firstname</td> </tr> <tr> <td style="padding: 2px;">Johnson</td> <td style="padding: 2px;">Robert J</td> </tr> </table>	Lastname	Firstname	Johnson	Robert J	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Name</td> </tr> <tr> <td style="padding: 2px;">Robert J Johnson</td> </tr> </table>	Name	Robert J Johnson	
Lastname	Firstname								
Johnson	Robert J								
Name									
Robert J Johnson									
Samantha S Peterson	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Lastname</td> <td style="padding: 2px;">Firstname</td> </tr> <tr> <td style="padding: 2px;">Peterson</td> <td style="padding: 2px;">Samantha S</td> </tr> </table>	Lastname	Firstname	Peterson	Samantha S	<table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="padding: 2px;">Name</td> </tr> <tr> <td style="padding: 2px;">Samantha S Peterson</td> </tr> </table>	Name	Samantha S Peterson	
Lastname	Firstname								
Peterson	Samantha S								
Name									
Samantha S Peterson									

WTS Recipient CSV File Formatting Intermediate (Non-routing)



This document explains the usage of headers and corresponds with the 'Intermediate (non-routing)' csv template. The minimum required headers are Name and Location. All other headers are optional and used to display information on the Receive screen.

****Headers are required and must remain exactly as formatted (capital letters, no spaces, etc.)**

Required Headers	Explanation
Lastname	Last name of the recipient
Firstname	First name of the recipient
Or*	
Name	The full name of the recipient with the first name and last name separated by a space.
Location	The recipient's location (i.e. Room 123 or Desk 7 or Admin Dept)

* When using names, either Firstname and Lastname are used or Name is used. If a recipient has a middle name/initial, add this to the Firstname or include in the full Name.

Naming Examples –

Recipient	Lastname, Firstname	Or	Name						
Tom Jones	<table border="1"> <tr><td>Lastname</td><td>Firstname</td></tr> <tr><td>Jones</td><td>Tom</td></tr> </table>	Lastname	Firstname	Jones	Tom	Or	<table border="1"> <tr><td>Name</td></tr> <tr><td>Tom Jones</td></tr> </table>	Name	Tom Jones
Lastname	Firstname								
Jones	Tom								
Name									
Tom Jones									
Bridgett Smith	<table border="1"> <tr><td>Lastname</td><td>Firstname</td></tr> <tr><td>Smith</td><td>Bridgett</td></tr> </table>	Lastname	Firstname	Smith	Bridgett	<table border="1"> <tr><td>Name</td></tr> <tr><td>Bridgett Smith</td></tr> </table>	Name	Bridgett Smith	
Lastname	Firstname								
Smith	Bridgett								
Name									
Bridgett Smith									
Robert J Johnson	<table border="1"> <tr><td>Lastname</td><td>Firstname</td></tr> <tr><td>Johnson</td><td>Robert J</td></tr> </table>	Lastname	Firstname	Johnson	Robert J	<table border="1"> <tr><td>Name</td></tr> <tr><td>Robert J Johnson</td></tr> </table>	Name	Robert J Johnson	
Lastname	Firstname								
Johnson	Robert J								
Name									
Robert J Johnson									
Samantha S Peterson	<table border="1"> <tr><td>Lastname</td><td>Firstname</td></tr> <tr><td>Peterson</td><td>Samantha S</td></tr> </table>	Lastname	Firstname	Peterson	Samantha S	<table border="1"> <tr><td>Name</td></tr> <tr><td>Samantha S Peterson</td></tr> </table>	Name	Samantha S Peterson	
Lastname	Firstname								
Peterson	Samantha S								
Name									
Samantha S Peterson									

Optional Headers	Explanation
Email	Used to send emails to recipients regarding package status
BadgeId	Displays the badge ID, employee ID, or other unique recipient identifier
City	City of the recipient
Building	Name of the building where the recipient is located
Floor	Used to display the floor number
Department	Name of the department the recipient works within (Admin, Finance, Service)
Mailbox	A.K.A. - Mailbox number, Mail Drop location, Mailstop, etc.
Phone	Used to display a phone number where the recipient can be reached
Cell	Used for sending SMS messages
Fax	Fax numbers to be displayed on the Receive screen
Company	Name of the recipient company
Classification	Used to segment recipients based upon classes (student / faculty)
costcenter	Used for displaying the cost center the recipient is associated with

File Example –

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Lastname	Firstname	Location	Email	Badgeld	City	Building	Floor	Department	Mailbox	Phone	Cell	Fax	Company	Classification	costcenter
2	Jones	Tom	Room 123	t.jones@email.com	10050294	London	Kennedy	9th	Admin	1005	200-234-7775	805-934-3223	200-234-8075	Biz-ness Inc.	Internal	321223
3	Smith	Bridgett	Room 456	b.smith@email.com	10061127	Paris	Jefferson	5th	Finance	1089	200-234-7776	805-929-2857	200-234-8076	Biz-ness Inc.	Internal	432862
4	Johnson	Robert J	Room 789	r.johnson@email.com	10050846	New York	Franklin	6th	Marketing	1123	200-234-7777	805-402-5897	200-234-8077	Biz-ness Inc.	Internal	567567
5	Peterson	Samantha S	Room 433	s.peterson@email.com	10059515	Los Angeles	Washington	12th	Sales	1134	200-234-7778	805-110-6943	200-234-8078	Biz-ness Inc.	Remote	987689
6	Davis	Tony	Room 278	t.davis@email.com	10066352	Dallas	Cromwell	1st	Service	1987	200-234-7779	217-445-9098	200-234-8079	Biz-ness Inc.	Remote	653635
7	Roberts	Miles	Room 820	m.roberts@email.com	10061778	Chicago	Baskin	8th	Finance	1001	300-234-7780	890-912-9933	200-234-8080	Biz-ness Inc.	Internal	654654
8	Carpenter	Blake	Room 105	b.carpenter@email.com	10050007	Boston	Humphries	1st	Marketing	1775	200-234-7781	405-393-2817	200-234-8081	Biz-ness Inc.	Remote	968797
9	Wilson	Jane	Room 107	j.wilson@email.com	10065588	Pittsburg	Carnegie	10th	Admin	1452	200-234-7782	805-111-5874	200-234-8082	Biz-ness Inc.	External	354334

WTS Recipient CSV File Formatting Intermediate (Routing)



This section explains the usage of headers and corresponds with the 'Intermediate (routing)' csv template. The minimum required headers are Name and Location. All other headers are optional and used to display information on the Receive screen.

****Headers are required and must remain exactly as formatted (capital letters, no spaces, etc.)**

Required Headers	Explanation
Lastname	Last name of the recipient
Firstname	First name of the recipient
Or*	
Name	The full name of the recipient with the first name and last name separated by a space.
Location	The recipient's location (i.e. Room 123 or Desk 7 or Admin Dept)

*** When using names, either Firstname and Lastname are used or Name is used. If a recipient has a middle name/initial, add this to the Firstname or include in the full Name.**

Naming Examples –

Recipient	Lastname, Firstname	Or	Name						
Tom Jones	<table border="1"> <tr> <td>Lastname</td> <td>Firstname</td> </tr> <tr> <td>Jones</td> <td>Tom</td> </tr> </table>		Lastname	Firstname	Jones	Tom	<table border="1"> <tr> <td>Name</td> </tr> <tr> <td>Tom Jones</td> </tr> </table>	Name	Tom Jones
Lastname	Firstname								
Jones	Tom								
Name									
Tom Jones									
Bridgett Smith	<table border="1"> <tr> <td>Lastname</td> <td>Firstname</td> </tr> <tr> <td>Smith</td> <td>Bridgett</td> </tr> </table>	Lastname	Firstname	Smith	Bridgett	<table border="1"> <tr> <td>Name</td> </tr> <tr> <td>Bridgett Smith</td> </tr> </table>	Name	Bridgett Smith	
Lastname	Firstname								
Smith	Bridgett								
Name									
Bridgett Smith									
Robert J Johnson	<table border="1"> <tr> <td>Lastname</td> <td>Firstname</td> </tr> <tr> <td>Johnson</td> <td>Robert J</td> </tr> </table>	Lastname	Firstname	Johnson	Robert J	<table border="1"> <tr> <td>Name</td> </tr> <tr> <td>Robert J Johnson</td> </tr> </table>	Name	Robert J Johnson	
Lastname	Firstname								
Johnson	Robert J								
Name									
Robert J Johnson									
Samantha S Peterson	<table border="1"> <tr> <td>Lastname</td> <td>Firstname</td> </tr> <tr> <td>Peterson</td> <td>Samantha S</td> </tr> </table>	Lastname	Firstname	Peterson	Samantha S	<table border="1"> <tr> <td>Name</td> </tr> <tr> <td>Samantha S Peterson</td> </tr> </table>	Name	Samantha S Peterson	
Lastname	Firstname								
Peterson	Samantha S								
Name									
Samantha S Peterson									

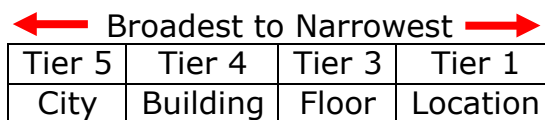
Optional Headers	Explanation
Email	Used to send emails to recipients regarding package status
BadgeId	Displays the badge ID, employee ID, or other unique recipient identifier
City	City of the recipient
Building	Name of the building where the recipient is located
BuildingCode	Used for routing to lay out the internal DB structure (see notes below)
Floor	Used to display the floor number
Department	Name of the department the recipient works within (Admin, Finance, Service)
LocCode	Used for routing to lay out the internal DB structure (see notes below)
Mailbox	A.K.A. - Mailbox number, Mail Drop location, Mailstop, etc.
Phone	Used to display a phone number where the recipient can be reached
Cell	Used for sending SMS messages
Fax	Fax numbers to be displayed on the Receive screen
Company	Name of the recipient company
Classification	Used to segment recipients based upon classes (student / faculty)
costcenter	Used for displaying the cost center the recipient is associated with

The number of levels or tiers will determine how LocCode and BuildingCode are used. LocCode is required for two or more levels. BuildingCode is required when cities and buildings are used and the number of tiers goes beyond three.

***Must have Location - It is required and is the lowest tier.**

- BuildingCode –
 - Required when City and/or Building columns are used in routing.
 - Is the concatenation of City and Building (in that order).
 - If City is not used, then Building and BuildingCode are the same.
 - If City is used, BuildingCode will be 'CityBuilding'.
 - Has a maximum length of 11 characters (may require shorter tier names).
- LocCode –
 - Required for all levels above two.
 - Is the concatenation of all tiers including cities and buildings (if used).
 - Has a maximum length of 32 characters (may require shorter tier names).

• 4 Possible Tiers –



- A Location is on a Floor
- A Floor is within a Building
- A Building is within a City

*If a tier is not used then the upper tiers append to the lower tiers –BuildingLocation (not using Floor) or CityFloor (not using Building)

Example Using All 4 Tiers –

	A	B	C	D	F	G
1	Tier 4	Tier 3	BuildingCode	Tier 2	Tier 1	LocCode
2	City	Building	CityBuilding	Floor	Location	CityBuildingFloorLocation
3	Denver	Ashe	DenverAshe	Blue	137	DenverAsheBlue137

Example Using 3 Tiers –

	B	C	D	F	G
1	Tier 3	BuildingCode	Tier 2	Tier 1	LocCode
2	Building	Building	Floor	Location	BuildingFloorLocation
3	Ashe	Ashe	5	137	Ashe5137

File Example –

	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	Lastname	Firstname	Location	Email	Badgeld	City	Building	BuildingCode	LocCode	Floor	Department	Mailbox	Phone	Cell
2	Jones	Tom	123	t.jones@email.com	10050294	London	Kennedy	LondonKenne	LondonKennedy9th123	9th	Admin	1005	200-234-7775	805
3	Smith	Bridgett	456	b.smith@email.com	10061127	Paris	Jefferson	ParisJeffer	ParisJefferson5th456	5th	Finance	1089	200-234-7776	805
4	Johnson	Robert J	789	r.johnson@email.com	10050846	New York	Franklin	New YorkFra	New YorkFranklin6th789	6th	Marketing	1123	200-234-7777	805
5	Peterson	Samantha S	433	s.peterson@email.com	10059515	Los Angeles	Washington	Los Angeles	LosAngelesWashington12th43	12th	Sales	1134	200-234-7778	805
6	Davis	Tony	278	t.davis@email.com	10066352	Dallas	Cromwell	DallasCromw	DallasCromwell1st278	1st	Service	1987	200-234-7779	217
7	Roberts	Miles	820	m.roberts@email.com	10061778	Chicago	Baskin	ChicagoBask	ChicagoBaskin8th820	8th	Finance	1001	300-234-7780	890
8	Carpenter	Blake	105	b.carpenter@email.com	10050007	Boston	Humphries	BostonHumph	BostonHumphries1st105	1st	Marketing	1775	200-234-7781	405
9	Wilson	Jane	107	j.wilson@email.com	10065588	Pittsburg	Carnegie	PittsburgCa	PittsburgCarnegie10th107	10th	Admin	1452	200-234-7782	805

Max 11 Characters Max 32 Characters

This section explains the usage of headers and corresponds with the 'Custom' csv template.

By selecting the custom template, Neopost USA Pro Services will customize the supplied file into the proper format for importing into WTS. No pre-formatting is required and any spreadsheet file type can be supplied. However, you are welcome to use the supplied template.

If there are any items that may need clarification, please include that information along with the recipient file.