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# ShipStation 24R2

## Test Results Document

By [NAW]

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1/4/2025

Version 1

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## Introduction

This document guides the user to setup, configure and use the ShipStation in Acumatica ERP  
Installing Acumatica ERP Software Components

To install Acumatica ERP software components, run Acumatica ERP installation package, and follow the instructions of the Acumatica ERP Installer wizard:

- On the Welcome page, click Next.
- On the License Agreement page, read the license agreement. To accept the license agreement, click I Agree and then click Next.
- On the Main Software Configuration page, specify the following options that you want, and then click Next
- Launch the Acumatica ERP Configuration wizard: Select this check box to continue deploying the Acumatica ERP application instance once the Acumatica ERP software components are installed. If you clear this check box, you can run the Acumatica ERP Configuration wizard at a later time by launching the wizard from the Windows Start menu.
- Install Report Designer: Select this check box to install the Report Designer component. If you clear this check box, you can install the Report Designer later by running the installation package.
- Install Debugger Tools: Select this check box to install the Debugger Tools component. This installs debug version of Acumatica core libraries.
- On the Confirm Installation page, click Next.

## Deploying Acumatica ERP Application Instance

This wizard runs automatically once the software components of Acumatica are installed or you can run it anytime from the Windows Start menu.

- Run the Acumatica ERP Configuration wizard.
- On the Welcome page of the Acumatica ERP Configuration wizard, click Deploy New Application Instance.
- On the Database Server Connection page, specify the Microsoft SQL Server that will be used by the application instance being deployed and then click Next.
- On the Database Configuration page, specify the following options and then click Next:
  - Create a new database: Select this option to create a new database and then enter a database name in the new database name field.
  - Connect to an existing database: Select this option to select an existing database, and then click on a server name in the server list below.
- On the Company Setup page, specify the appropriate options to add companies for a multi-company application instance of Acumatica ERP. By default, the Configuration wizard creates a single company named Company.
- On the Database Connection page, specify the authentication method used by this application instance of Acumatica ERP to connect to the database, and then click Next.
- On the Instance Configuration page, specify the following options and then click Next:

- Instance Name: Enter a name for this application instance of Acumatica ERP.
- Create Portal: Leave this check box cleared. o Local Path to the Instance: Enter a path on the local computer to this application instance.
- Select an account to access ASP.NET application: Specify whether you want the Anonymous user account to be used to access ASP.NET, or specify another user account
- On the Web Site Configuration page, configure the list of Web sites and create a virtual directory. To use the URL of the IIS default site (i.e., http://www.domain.com), clear the Create Virtual Directory check box not to create a virtual directory.
- On the Confirm Configuration page, view the configuration settings you have specified and then click Finish to deploy this application instance.

#### Changing the Password at the First Logon

Every Acumatica ERP instance comes with the active default user account which you use to log on to the system. You start working with Acumatica ERP by changing the password for the default user.

#### To Change the Password for the Default User:

- Launch the application instance you have deployed
- On the Login page, enter the default credentials:
- Username: **admin**
- Password: **setup**
- To change the default password, type the new password in the New Password field and Confirm Password boxes.
- Click Login.

#### Implementation step for Existing Customers

**After the upgrade from 23R1 or (older versions) to the 23R2 version there is a change in the endpoint contract versions where the older system contract is not supporting from 23R2 version. This may lead to store connection failures.**

**To overcome above issue:** Before republishing the 23R2 ShipStation package, we need to execute the following steps as a precondition.

#### Steps: (Delete existing end point)

- Navigate to Web Service End point screen.
  - Click on the KNShipStationEndpoint 17.200.001
  - Web service endpoint screen system contract field automatically will be displayed with “3”
  - Below is the screenshot for reference.
- 
- Click on Delete Button
  - Click on save button.
  - Republish the 23R2 ShipStation (**ShipStation Acumatica2023R2**)

- Now again navigate to Web Service Endpoints.
- Click on KNShipStationEndpoint 17.200.001
- Click on Endpoint properties tab and System contract should display now with “4.”

**Note:**

- If you follow above all steps, store connection will be successful, and syncs will work as expected.
- If we have already published the packages without precondition, then store connection will fail. Even in that case please follow above steps (delete existing end point & Republish 23R2 package) to establish store connection back.

**Publishing the Customization Projects**

- Navigation: SYSTEM-> CUSTOMIZATION->MANAGE-> CUSTOMIZATION PROJECTS
- 
- The Publish Customization displays the list of customization projects available for the current application instance.
- 
- Import the customization package using the Import Button.
- 
- Click on Browse button and select the required package
- The selected package will display in the open package popup. Click on the UPLOAD button
- 
- The imported package will be shown in the grid.
- Select the check box which is displayed on the left side of the record in project and click Publish. The package will be published.
- Once the package got published, the check box under the published column will display as selected against the imported package.

**Note:** If a user needs to publish multiple packages, select the respective packages, then click on the publish button.

Once Package is published we see the below screen in Acumatica.

**Store Setup Configuration in ShipStation**

Navigation: ACCOUNT SETTINGS -> SELLING CHANNEL -> STORE SETUP ->

## CONNECT A STORE OR MARKETPLACE

- Click on Create a store or Marketplace opens an Add Store popup window, select “Acumatica” from the available icons.
- Provided a dropdown ‘Select Acumatica Version’ with options.
- Certified Acumatica- the Order from Acumatica will sync to Middleware and from Middleware SS will retrieve Acumatica orders
- Select the ‘**V2 Acumatica**’ version as follows.
- Provide the Acumatica URL to which the connection must be made in the Base URL field.
- Enter the **Username** of the Acumatica instance.
- Enter the **Password**.
- Enter the **Company Name**.
- Enter the **Company ID**
- Click **Connect**
- The Store Name will display as New Acumatica Store in the grid, click on (...) it against the store and then click on **Edit Store Details**
- Page will be redirected to new and displayed with New Store details and it will be displayed like shown below
- Provide all necessary details in General Tab.
- Provide Store name. Select below required checkboxes/radio button and click on Save Changes under Store settings

### Shipstation workspace:

- 1.Shipstation configuration setup
- 2.Shipstation mapping screen
- 3.Shipstation logs

### ShipStation Configuration:

- On the ship station configuration screen we can set the export entity. Depending on that,

order sync or shipment sync can be performed.

- Order Entity
- Shipment Entity

Here depending on the entity we select, the below fields also can be selected

Order sync:

1. Order type can be chosen
2. Enable support for partial shipments from shipstation checkbox can be enabled or disabled
3. Modify Shipvia on shipment confirmation checkbox can be enabled or disabled
4. Carrier, Default box, Default shipping terms Weight unit can be chosen
5. Import freight cost from shipstation on shipment confirmation checkbox can be enabled or disabled.

Shipstation Mapping Screen:

- User can able to Map required Acumatica field mapping against shipstation fields for Order and shipment entity

### **Order Entity:**

On the Mapping screen the below fields should be displayed

1. Mappingentity
2. Mappingentity drop down should consists of orders and shipments
4. Shipstation field
5. Mappingrule
6. Acumaticaview
7. Acumaticafield
9. Isdefault

### **Shipment Entity:**

#### **Shipstation mapping screen - Notes request:**

- Through this mapping screen,we can map theacumaticafields with the ship station field
- Select the "Mapping rule" as"mapping"
- In theacumaticaview name, for select the desired field in the drop down (Say shipment).
- And in the Acumatica field,select the desired field in the drop downrespectively(say NoteId)

Navigate to the “shipping’ screen in acumatica and enter Notes as per your choice and save it.

#### ShipStation Log Screen:

- This screen has all the error logs with respect to the order and shipment numbers. To view the logs

#### Clear logs

- Clear logs can be performed to delete any particular log details

- When clear log button is clicked, the below pop-up will be displayed.
- One can enter the required date and perform clear logs action. So that the logs which are existing the specified date will be deleted.

#### Order sync from Acumatica to ship station

##### Pre-condition:

- On the configuration screen set the export entity as Order.
- On the order type dropdown, select the type of order which needs to be synced
  
- Navigate to Sales Order Screen
- Click on + Option
- Select the customer from selector
- Add the line details from Details tab
- Change the Currency from selector
- Click on Save
  
- Navigate to ship station portal and refresh the store which is configured.

- Click on print label

#### Order sync from Shipstation to acumatica

- After the label is generated in shipstation, navigate back to acumatica and sync back the order
- After re-syncing the order in acumatica the status of the sales order will be displayed as completed
- 
- The shipment associated with that particular sales order will be in confirmed status
- On the shipments screen of the particular sales order Ship station info details, packages details will be displayed as shown below

#### Shipment sync from Acumatica to ship station

##### Pre-condition:

- On the configuration screen set the export entity as shipment.
- On the ship via dropdown, select the ship via with which sync need to happen for a shipment
- 
- Navigate to Sales Order Screen
- Click on + Option
- Select the customer from selector
- Add the line details from Details tab
- Click on Save
- Click on Shipping Tab
- Select the ship via as BCSHIP
- Click on Save
- 
- Click on Create shipment
- 
- Navigate to ship station portal and refresh the store which is configured.

- Click on print label

Shipment sync from ship station to acumatica

- Navigate back to acumatica portal and resync back the shipment
- Once the shipment is synced back to acumatica, the shipment state will be in confirmed status.

## CustRef1 and Custref2 fields in shipstation truncate upto 30 characters:

When We pass more than 30 characters in Custom Ref Nbr 1 and CustomRef Nbr 2 upon confirmation the field will truncate upto 30 characters.

## Known/Open Issues in 24R1 core Shipstation product:

- Amazon Shipments not syncing back to AMZ. Client uses Shipstation
- unable to sync or process data to Amazon for the shipments updated by Shipstation because of missing data related Box contents. Since the box contents are missing, it is not syncing to Amazon.
- Forward Amazon Order number to Shipstation.
- Acumatica is not saving multiple Tracking Numbers (packages tab) sent by ShipStation
- Shipstation Fedex ground shipments not creating packagess
- Tracking Number from ShipStation info tab is not updating

**Note :** We are currently investigating the above mentioned open items and will address them as soon as possible. We will keep Shipstation team posted on the updates.