

Installation Guide

ShipStation

Version 1.30

September 30, 2021



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Preinstallation

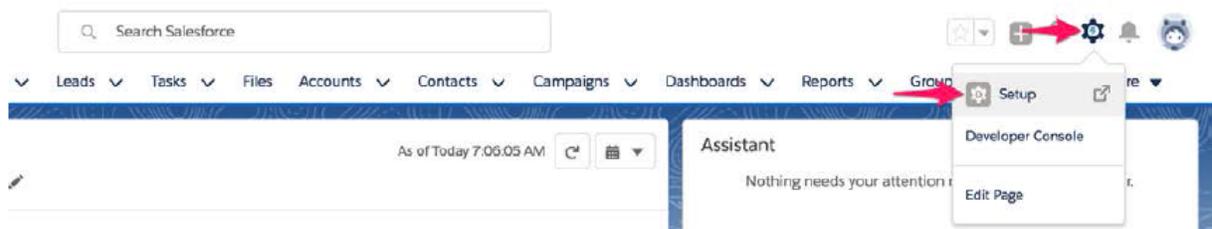
You will need the following to successfully complete this install:

- The ShipStation Package install link (Note: replace “login” with “test” in the url if installing into a sandbox)
- An Endpoint URL, API Key (ask your ShipStation Administrator)

Introduction

This document serves as an installation and configuration guide for the ShipStation app. The first section covers the installation of the ShipStation package. The app is intended to be installed in an Enterprise Edition Org. The following sections will walk you through applying permission sets and completing Setup Assistant. This document is meant to guide you through configuring your org in a Lightning Experience environment.

In the following sections, the highlighted navigation steps begin from Setup which can be accessed by clicking the gear icon to the upper right and selecting Setup. Once in Setup, you may use the Quick Find box in the left column of the home tab to find and navigate to the appropriate section or access the Object Manager tab.



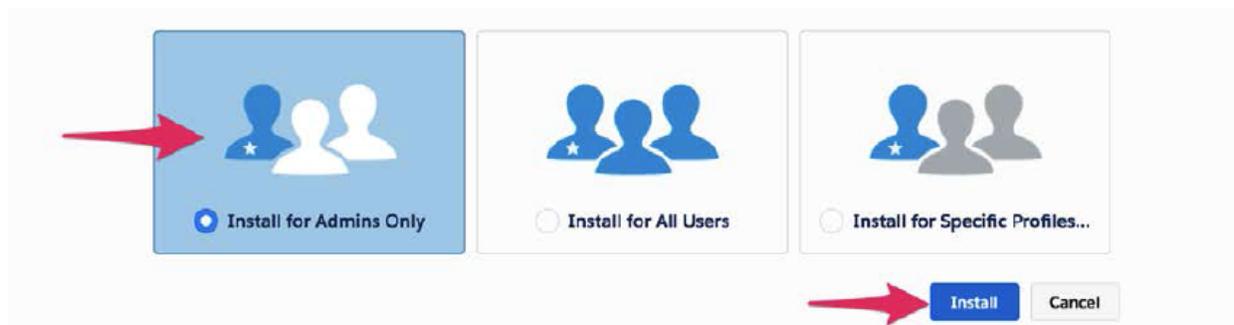
Installation

Installing the ShipStation Package

Copy and paste the package install URL into your browser's address bar (please contact your administrator for the package link). If you are not already logged into the org you wish to install the package into, salesforce will prompt you to log in.

- **Install for Admins Only** is recommended - this option allows for controlling access and permissions after the package has been installed.

For further information, [please click here to refer salesforce documentation on Package Installations](#).

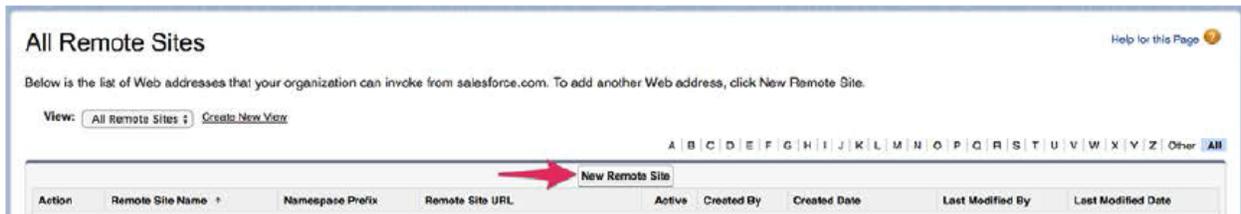


ShipStation Configuration

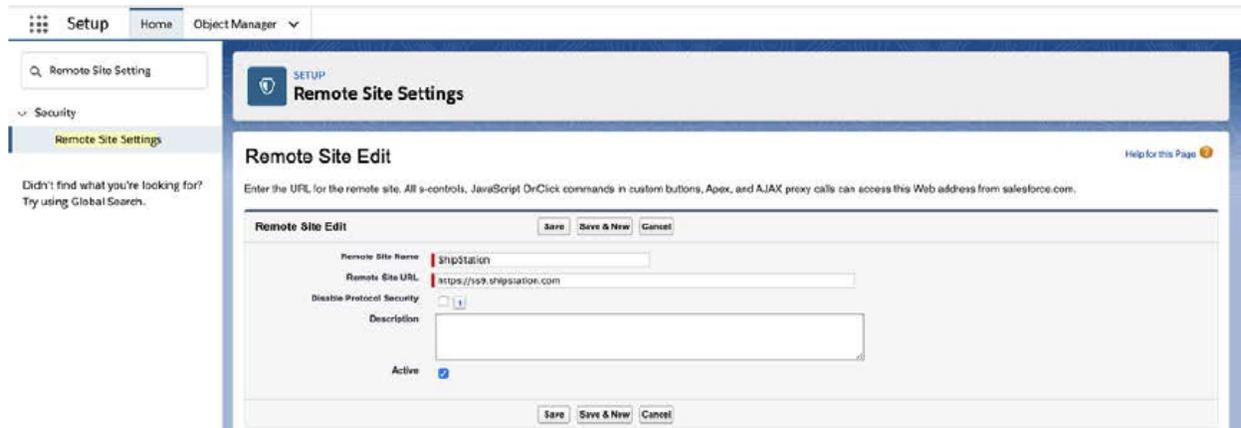
Remote Site Setting

Before code from the package can make any calls to ShipStation, your ShipStation domain needs to be authorized in Salesforce via Remote Site Settings. Navigate to **Setup > Security > Remote Site Settings**.

- Click **New Remote Site**



- Enter a **Remote Site Name**
- Enter your ShipStation domain in the **Remote Site URL**
(ex: https://ss9.shipstation.com) - **Even if the subdomain reads “ship9”, “ss9” should be used**
- Check the **Active** checkbox
- Click **Save**



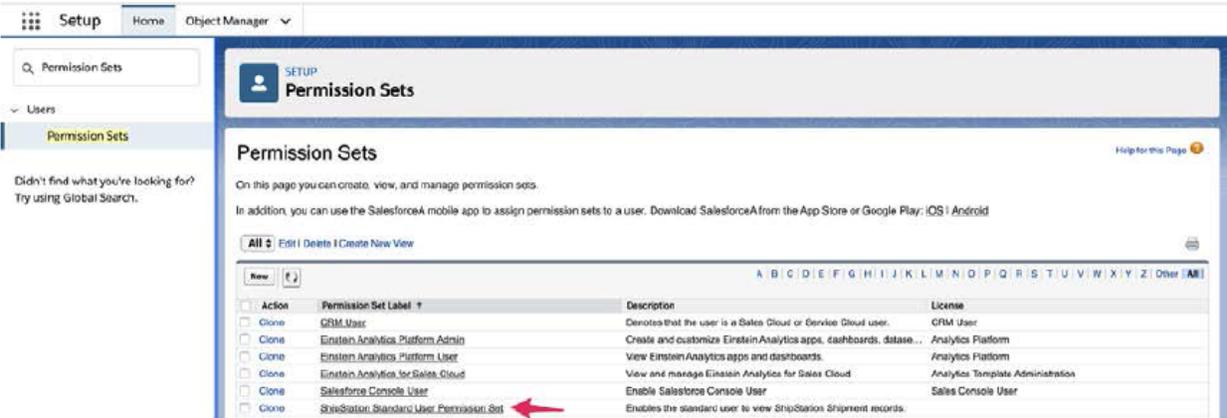
Permission Set

There is one permission set included with the ShipStation package. The ShipStation Standard User permission set will need to be assigned to any user that will be viewing shipment records.

Assign Permission Set

To assign permission sets, navigate to **Setup > User > Permission Sets** and select the ShipStation Standard User Permission Set.

- Select the ShipStation Standard User Permission Set



- From the Permission Set Overview page, click **Manage Assignments**



- Click **Add Assignments** > Select the users who need access and click **Assign**.

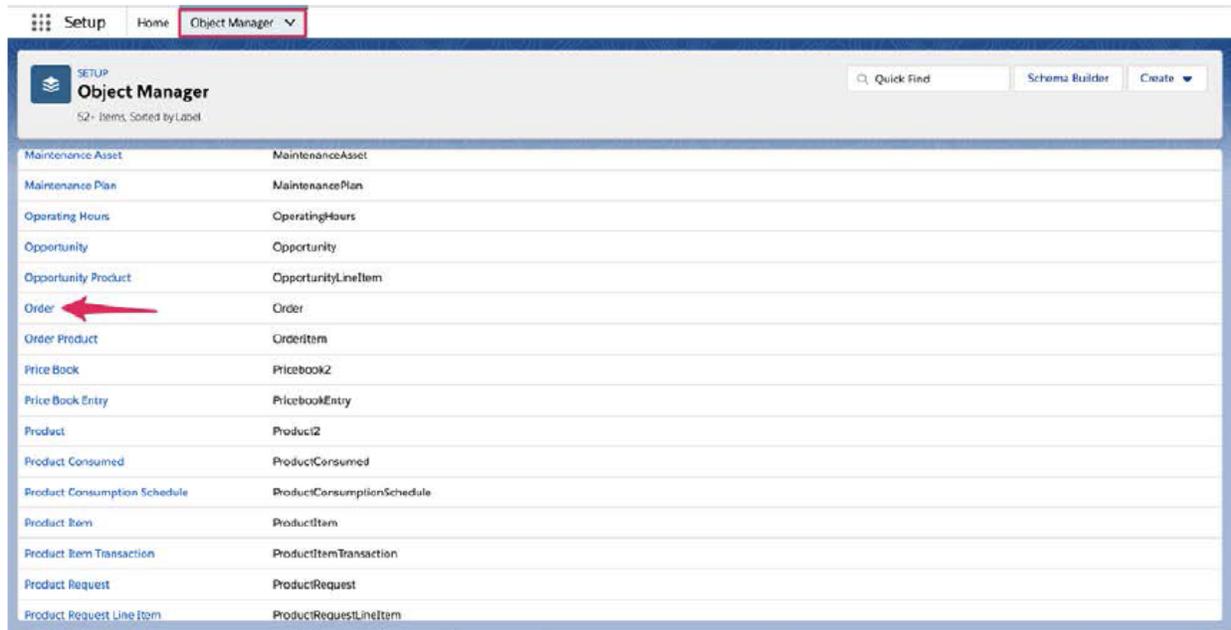
Adding Picklist Value for Status Object

As an admin, you will need to add picklist values for the Order object or the custom object in Salesforce that will be representing the Order object from ShipStation. The value Awaiting Shipment will be required for ShipStation to pick up Orders from Salesforce.

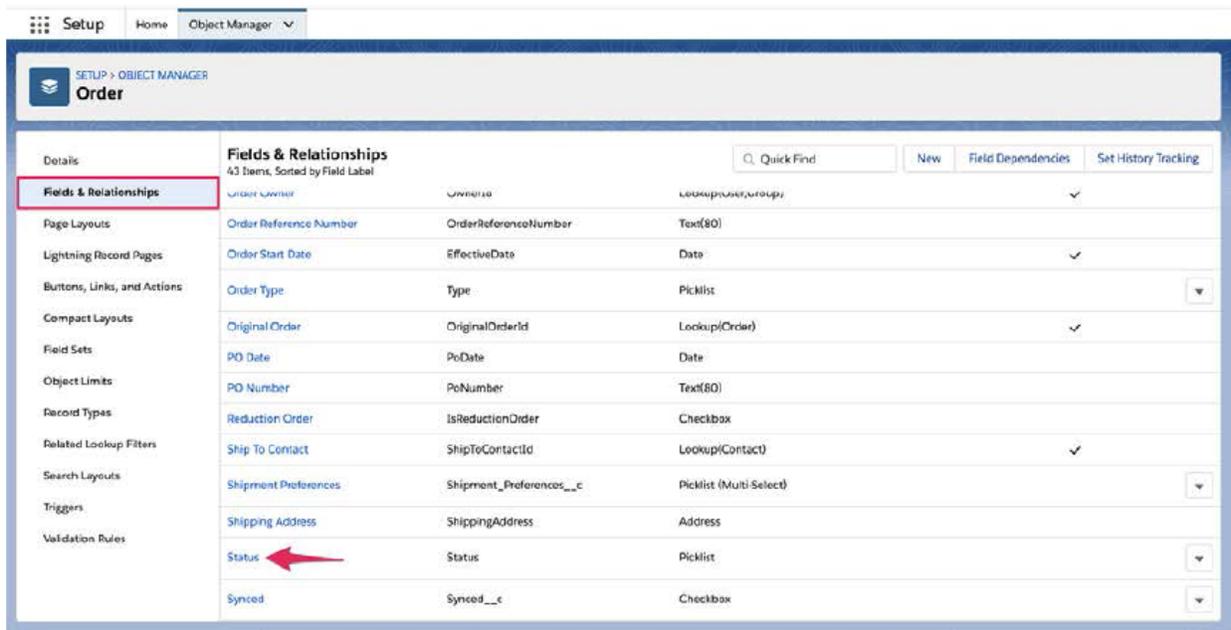
-The values required for the **label** are: **Awaiting Payment** and **Awaiting Shipment**.

-The values required for the **API Name** are: **AwaitingPayment** and **AwaitingShipment**. *(After saving these values, double check that there are no spaces in between words.)*

- Click into the **Object Manager** Tab
- Click into the **Order** object or the custom object that will be representing the Order object



- Click into **Fields & Relationships**
- Then click into the **Status** field



- Click **New**

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Validation Rules

Field Information

Field Label Status Field Name Status

Data Type Picklist

Help Text

Description

Data Owner

Field Usage

Data Readability Level

Field Dependencies [New](#) [Field Dependencies Help](#)

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Order Status Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Order Status Picklist Values Help](#)

Action	Values	API Name	Status Category	Chart Colors	Modified By
Edit Deactivate	Draft	Draft	Draft	Assigned dynamically	Matthew Kurzba, 9/11/2019 5:40 AM
Edit Deactivate	Activated	Activated	Activated	Assigned dynamically	Matthew Kurzba, 9/11/2019 5:40 AM

Inactive Values

No inactive values defined.

- Enter picklist value
- Enter API name
- Click **Save**

Setup Home Object Manager

SETUP > OBJECT MANAGER
Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Validation Rules

Picklist Edit
Order Status [Help for this Page](#)

Enter a name for the picklist value below.

Label

API Name

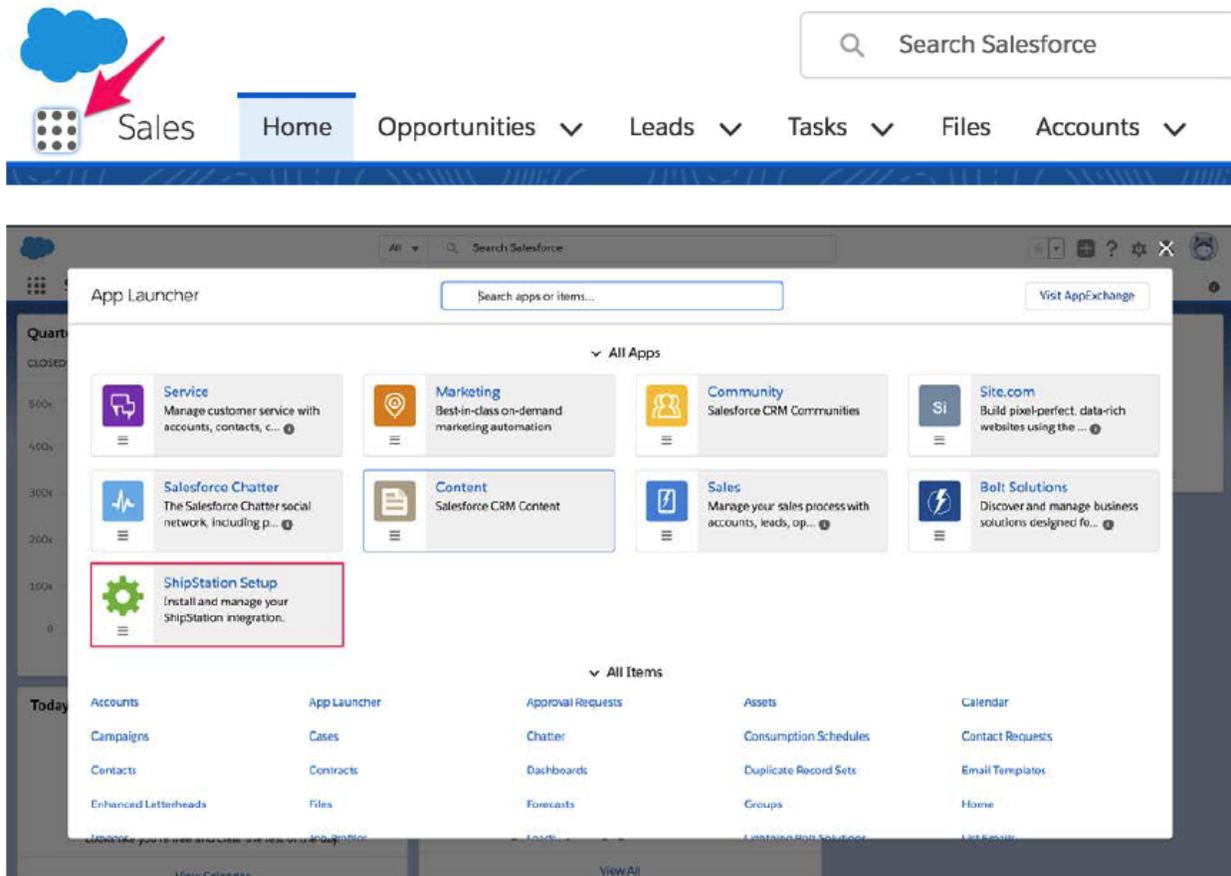
Status Category

Chart Color

[Save](#) [Save & New](#) [Cancel](#)

ShipStation Setup (Setup Assistant)

The ShipStation Setup Assistant will need to be completed to connect your Salesforce org to your ShipStation account in order to create orders and to receive shipments from ShipStation. To start Setup Assistant, navigate to **App Launcher > ShipStation Setup > Setup Assistant**



System Connections

- Click **Edit**

ShipStation[®]

✓ **System Connections**
Authorize connections between ShipStation and Salesforce. [Edit](#)

✓ **Data Mapping**
Determine how ShipStation data will be represented in Salesforce. [Edit](#)

Need help?

Check out our list of resources at right for general help with ShipStation and Salesforce, or get in touch with our support team for one-on-one assistance.

All Users: Send an email to our support team and we'll get back to you no later than one business day.

Silver Plan Accounts and above: Open a live chat with a support agent via the ShipStation Support portal.

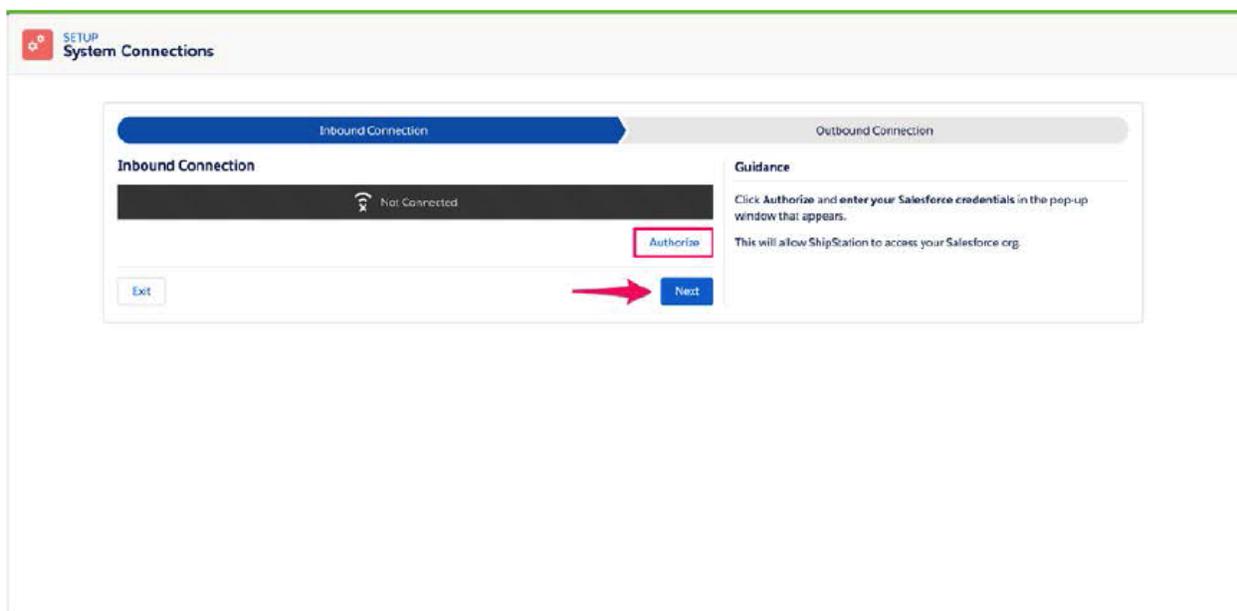
Major Accounts: Get phone support from our Major Accounts help team between 8 AM and 6 PM CST.

Helpful Links

- [ShipStation Support](#)
- [Salesforce Support](#)
- [Salesforce Trailblazer Community](#)

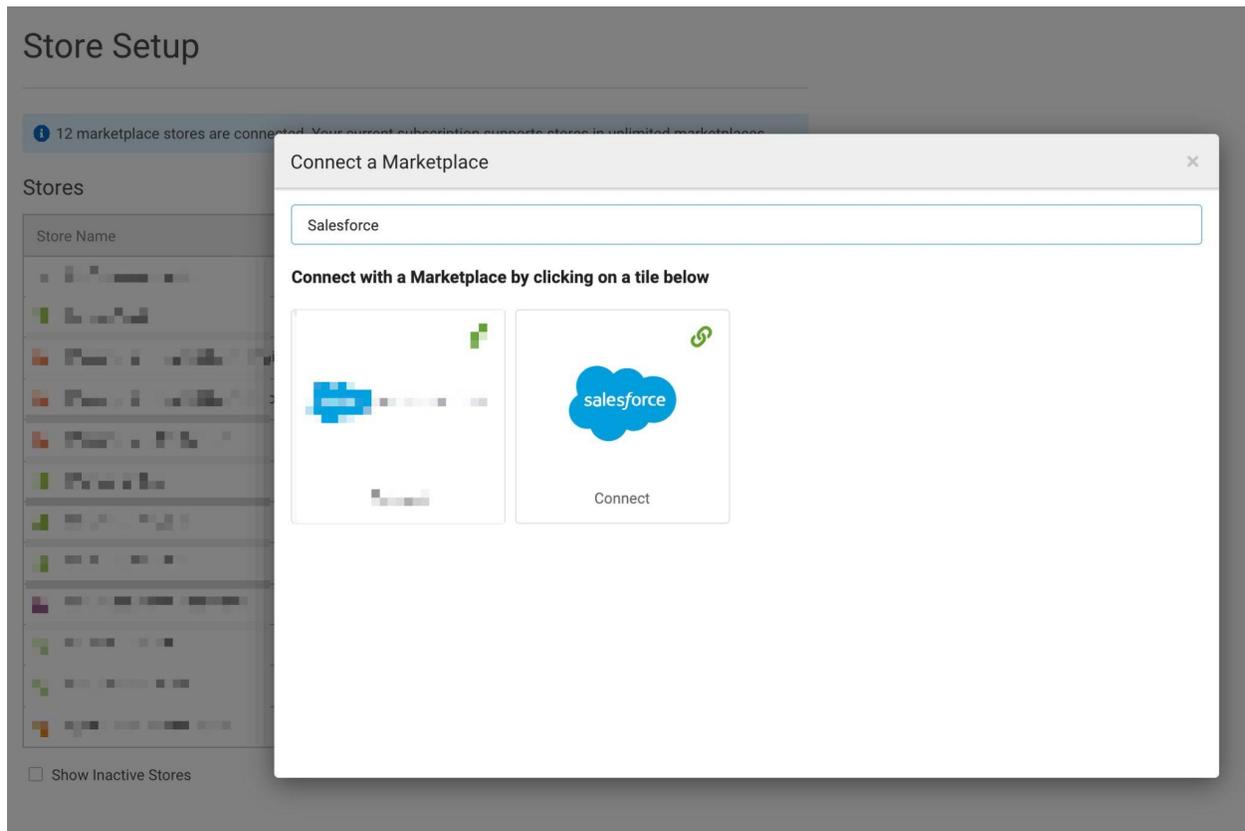
Establish an outbound and inbound connection

- Enter your Salesforce Credentials
- Click **Authorize**
- Click **Next**



In your ShipStation account

- Click **Account Settings (Gear Icon) > Selling Channels > Store Setup > Connect a Store or Marketplace > Search Salesforce -> Click Salesforce**



- Scroll to the bottom of the SDFC Service Agreement modal to accept **Terms and Conditions**
- Copy **“Connect URL”** and **“ShipStation API Key”** for use in the next step

Outbound Connection

Outbound Connection

*Endpoint URL

*API Key

Not Connected

Authorize

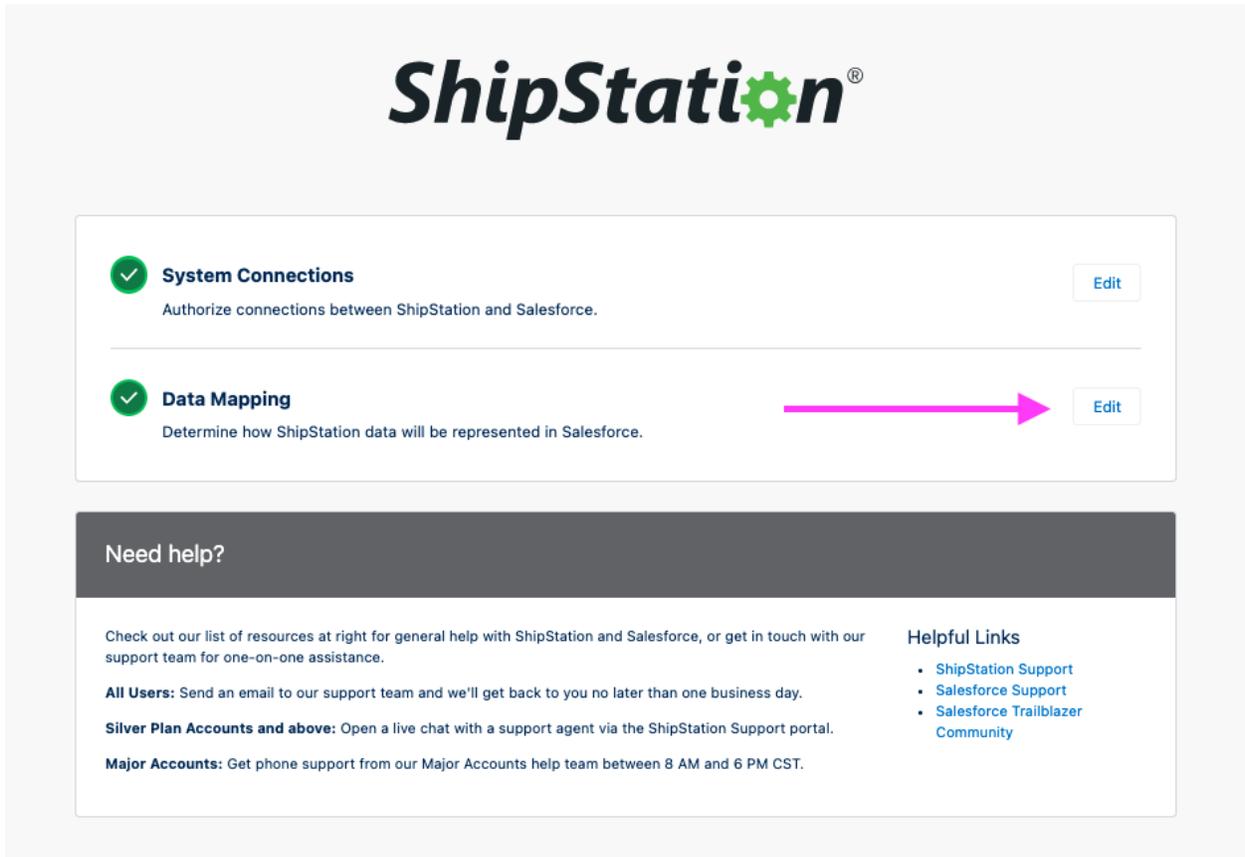
Back Exit Finish

Guidance

Enter your ShipStation endpoint URL and API key and click **Authorize**. This will enable Salesforce to access information from your ShipStation account.

Data Mapping

- Click **Edit**



The screenshot displays the ShipStation interface. At the top, the ShipStation logo is centered. Below it, there are two main sections. The first section is titled "System Connections" and includes a description: "Authorize connections between ShipStation and Salesforce." To the right of this section is an "Edit" button. The second section is titled "Data Mapping" and includes a description: "Determine how ShipStation data will be represented in Salesforce." To the right of this section is another "Edit" button, which is highlighted by a pink arrow pointing to it from the left. Below these sections is a dark grey header with the text "Need help?". Underneath this header, there is a paragraph of text: "Check out our list of resources at right for general help with ShipStation and Salesforce, or get in touch with our support team for one-on-one assistance." This is followed by three bullet points: "All Users: Send an email to our support team and we'll get back to you no later than one business day.", "Silver Plan Accounts and above: Open a live chat with a support agent via the ShipStation Support portal.", and "Major Accounts: Get phone support from our Major Accounts help team between 8 AM and 6 PM CST." To the right of this text is a section titled "Helpful Links" with three bullet points: "ShipStation Support", "Salesforce Support", and "Salesforce Trailblazer Community".

- Select a Salesforce object that will represent the ShipStation Product object
(Note: this will be defaulted to the Product object. If another object in your org serves as the Product Object, you will need to create ALL fields present on the Product Object field mapping on this object, or map equivalent fields.)
- To map a ShipStation field click the Add Mapping button and map it to the Salesforce Field
(Note: MSRP and Currency Type fields are required fields for ShipStation. Null values during order import will result in import errors.)
- Click **Next**

Product Field Mapping
✓
✓
✓

Product Field Mapping

Object
Product ▼

SHIPSTATION	SALESFORCE FIELD	REMOVE
Currency Type	Currency Type ▼	🗑️
Description	Product Description ▼	🗑️
Msrp	Msrp ▼	🗑️
Name	Product Name ▼	🗑️
Product Id	Product ID ▼	🗑️
SKU	Product SKU ▼	🗑️

Add Mapping ←
 Exit
Next →

Guidance

Data mapping determines how external data will be stored in Salesforce. By default, Salesforce will store **ShipStation product data** in the **Product** object with the required field mappings shown here. Additional mappings can be added by clicking **Add Mapping**.

If you'd like to use another Salesforce object to store this data, you'll have to complete data mapping for your selected object before moving on to the next step.

Otherwise, click **Next** to continue with the default mappings.

- Select a Salesforce object that will represent the ShipStation Order Object.
(Note: this will be defaulted to the Order object. If another object in your org serves as the Order Object, you will need to create ALL fields present on the Order Object field mapping on this object, or map equivalent fields.)

- If using a different object to represent the Order Object, the Synced field will also need to be created on that object.

- To map a ShipStation field click the Add Mapping button and map it to the Salesforce Field

- Click **Next**

Order Field Mapping

Object
Order

Order Status Mapping

SHIPSTATION	SALESFORCE
Order Status	Status

[Map Picklist Values](#)

ShipStation-to-Salesforce Field Mapping

SHIPSTATION	SALESFORCE FIELD	REMOVE
Account Id	Account ID	✕
Bill to Contact Id	Bill To Contact ID	✕
Sales Order Id	Order Number	✕
Ship to Contact Id	Ship To Contact ID	✕
Shipping Street	Shipping Street	✕
Shipping City	Shipping City	✕
Shipping State	Shipping State/Province	✕
Shipping Postal Code	Shipping Zip/Postal Code	✕
Shipping Country	Shipping Country	✕
Buyer Email	Bill To Contact > Email	✕
Company Name	Account > Account Name	✕

[Add Mapping](#)

[Back](#) [Exit](#) [Next](#)

Guidance

By default, Salesforce will store **ShipStation order data** in the **Order** object with the required field mappings shown here. Additional mappings can be added by clicking **Add Mapping**.

If you'd like to use another Salesforce object to store this data, you'll have to complete data mapping for your selected object before moving on to the next step.

You'll also need to select a Salesforce picklist field to represent ShipStation order statuses, as well as an option in that picklist that will represent the **AwaitingShipment** order status. This will determine when orders in Salesforce will be sent to ShipStation for processing.

Otherwise, click **Next** to continue with the default mappings.

Custom Field Mapping

- As of Version 1.30, Custom Fields can be mapped into ShipStation to import additional fields from the Order Field Mapping table
- The ShipStation Custom Fields fields are labeled “CustomField1”, “CustomField2”, and “CustomField3”
- For simplicity, the image below shows the Salesforce side fields named to match, but these fields can be any field that is present on the Order object

CustomField1 ▼	CustomField1 ▼	🗑️
CustomField2 ▼	CustomField2 ▼	🗑️
CustomField3 ▼	CustomField3 ▼	🗑️

Mapping Order Status Values

- Select **Map Picklist Values**
- Choose the Awaiting Shipment and Awaiting Payment values established in the **Adding Picklist Value for Status Object** section
- Check “**Sync**” Box next to the values in use
- Click **Confirm**

Map Order Status Options

First, map ShipStation order statuses to their corresponding Salesforce Order Status picklist values. Then, select order statuses that will prompt data sync between Salesforce and Shipstation.

SHIPSTATION	SALESFORCE PICKLIST VALUE	SYNC
Awaiting Payment	<input type="text" value="Awaiting Payment"/>	<input checked="" type="checkbox"/>
Awaiting Shipment	<input type="text" value="Awaiting Shipment"/>	<input checked="" type="checkbox"/>
Cancelled	<input type="text" value="Select an Option"/>	<input type="checkbox"/>
Completed	<input type="text" value="Select an Option"/>	<input type="checkbox"/>
On Hold	<input type="text" value="Select an Option"/>	<input type="checkbox"/>
Pending Fulfillment	<input type="text" value="Select an Option"/>	<input type="checkbox"/>
Shipped	<input type="text" value="Select an Option"/>	<input type="checkbox"/>

Cancel

Confirm

- Choose a Salesforce object to represent ShipStation line items in Salesforce
(Note: this will be defaulted to the Order Product object. If another object in your org serves as the Order Product Object, you will need to create ALL fields present on the Order Object field mapping on this object, or map equivalent fields.)
- To map a ShipStation field click the Add Mapping button and map it to the Salesforce Field
(Note: Currency Type field is a required field for ShipStation. Null values during order import will result in import errors.)
- Click **Next**

✓
✓
Line Item Field Mapping
✓

Line Item Field Mapping

Object

Lookup Field Mapping

PRODUCT OBJECT	LOOKUP FIELD
Product	<input type="text" value="Product ID"/>
ORDER OBJECT	LOOKUP FIELD
Order	<input type="text" value="Order ID"/>

ShipStation-to-Salesforce Field Mapping

SHIPSTATION	SALESFORCE FIELD	REMOVE
Currency Type	<input type="text" value="Currency Type"/>	✕
Quantity	<input type="text" value="Quantity"/>	✕
Sales Order Item Id	<input type="text" value="Order Product Number"/>	✕
Tax Amount	<input type="text" value="Tax Amount"/>	✕
Total	<input type="text" value="Total"/>	✕
Unit Price	<input type="text" value="Unit Price"/>	✕

Guidance

By default, Salesforce will store **ShipStation line item data** in the **Order Product** object with the required field mappings shown here. Additional mappings can be added by clicking **Add Mapping**.

This object has lookup relationships with the Product and Order objects via its **Product ID** and **Order ID** fields.

If you'd like to use another Salesforce object to store this data, you'll have to complete data mapping for your selected object before moving on to the next step.

Otherwise, click **Next** to continue with the default mappings.

- Select an object to represent the ShipStation Shipment in Salesforce.
(Note: this will be defaulted to the ShipStation Shipment object. If another object in your org serves as the ShipStation Shipment Object, you will need to create ALL fields present on the ShipStation Shipment field mapping on this object, or map equivalent fields.)
- To map a ShipStation field click the Add Mapping button and map it to the Salesforce Field
- Click **Finish**

✓
✓
✓
Shipment Field Mapping

Shipment Field Mapping

Object

Lookup Field Mapping

ORDER OBJECT	LOOKUP FIELD
Order	<input type="text" value="Order"/>

ShipStation-to-Salesforce Field Mapping

SHIPSTATION	SALESFORCE FIELD	REMOVE
Sales Order Id	<input type="text" value="Order Number"/>	✕
Shipping Carrier Id	<input type="text" value="Shipping Carrier Id"/>	✕
Tracking Number	<input type="text" value="Tracking Number"/>	✕

[Add Mapping](#)

[Back](#)
[Exit](#)
[Finish](#)

Guidance

By default, Salesforce will store **ShipStation shipment data** in the **ShipStation Shipment** object with the required field mappings shown here. Additional mappings can be added by clicking **Add Mapping**.

This object has a lookup relationship with the Order object via its **Order ID** field.

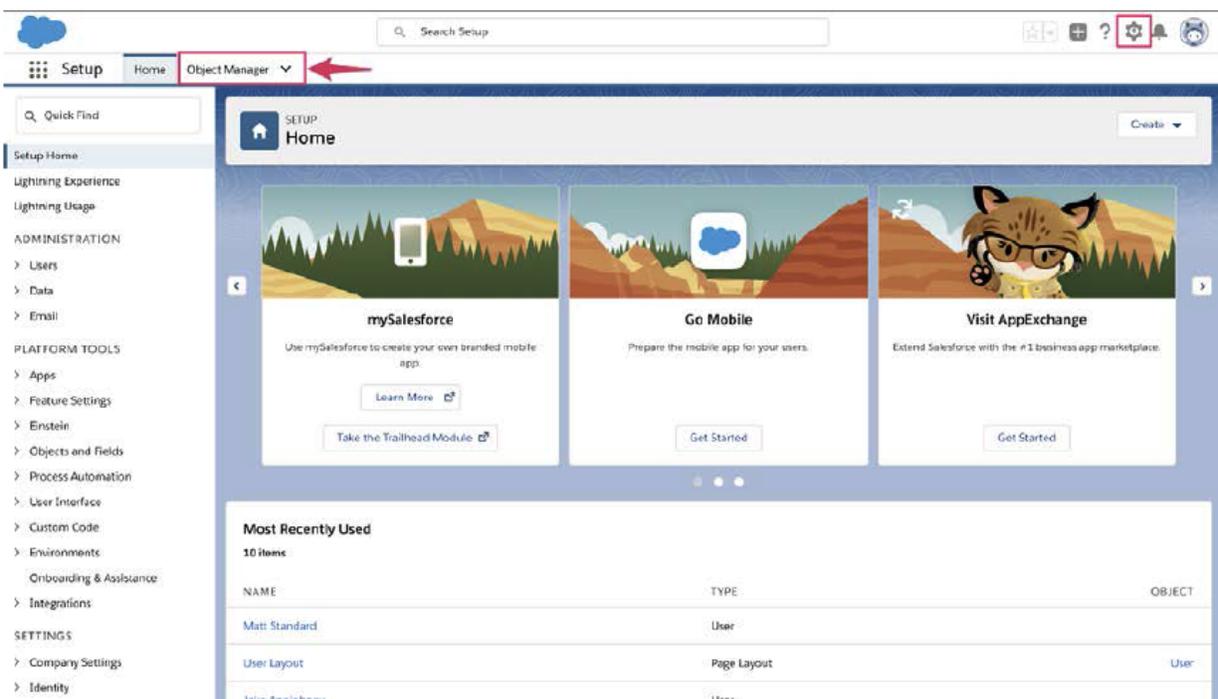
If you'd like to use another Salesforce object to store this data, you'll have to complete data mapping for your selected object before finishing Setup.

Otherwise, click **Finish** to complete Setup with the default mappings.

Adding A Field to a Page Layout

To have the custom fields displayed on a record page, the admin will need to place it on the page layout for the Product, Order, and Order Product. This example shows how to place it onto the Order page. **(Note : Ship To Contact and Bill To Contact fields must be populated before syncing with ShipStation.)**

- In your Salesforce org, navigate to **Setup** by clicking the gear icon in the upper right of the page, then click on **Object Manager**



The screenshot shows the Salesforce Setup interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' (highlighted with a red box and an arrow). Below this is a sidebar with a search bar and a list of categories: Setup-Home, ADMINISTRATION, PLATFORM TOOLS, and SETTINGS. The main content area shows a 'SETUP Home' dashboard with three cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below the dashboard is a 'Most Recently Used' table with 10 items.

NAME	TYPE	OBJECT
Matt Standard	User	
User Layout	Page Layout	User
like Anninhnn	User	

- Click **Order**

Setup Home ObjectManager

SETUP Object Manager
52 Items, Sorted by Label

Quick Find Schema Builder Create

Opportunity	Opportunity				
Opportunity Contact Role	OpportunityContactRole				
Opportunity Product	OpportunityLineItem				
Order	Order				
Order Product	OrderItem				
Price Book	Pricebook2				
Price Book Entry	PricebookEntry				
Product	Product2				
Quick Text	QuickText				
Recommendation	Recommendation				
Scorecard	Scorecard				
Scorecard Association	ScorecardAssociation				
Scorecard Metric	ScorecardMetric				
Setup Data	qasstation__Setup_Data__c	11/14/2019	✓	✓	▼
ShipStation Shipment	qasstation__ShipStation_Shipments__c	11/14/2019	✓	✓	▼

- Click **Page Layouts** then click **Order Layout**

Setup Home ObjectManager

SETUP OBJECT MANAGER
Order

Quick Find New Page Layout Assignment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Page Layouts
1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Order Layout	Matthew Kumya, 9/11/2019, 6:40 AM	Matthew Kumya, 11/13/2019, 3:40 PM

- Click and drag the field onto the page

The screenshot shows the Salesforce Setup interface for an 'Order' object. On the left, a sidebar lists various configuration options, with 'Page Layouts' selected. The main area displays the 'Layout Properties' for a specific page layout. A table of fields is shown, with 'Additional Cost' highlighted in red. A red arrow points from this field to the 'Order Detail' section of the page layout, indicating the drag-and-drop action.

Fields	Activated By	Contract End Date	Customer Authoriz...	Estimated Confir...	Fulfillment Status	Insurance Paid
Section	Activated Date	Contract Name	Customer Authoriz...	Estimated Shipping	Insurance Cost	Insured Value
Blank Space	Additional Cost	Contract Number	Customer Authoriz...	Estimated Shipping	Insurance Cost	Insured Value
Account Name	Billing Address	Contact	Created By	Estimated Confir...	Fulfillment Status	Insurance Paid
Account Number						Last Modified By

- Click Save

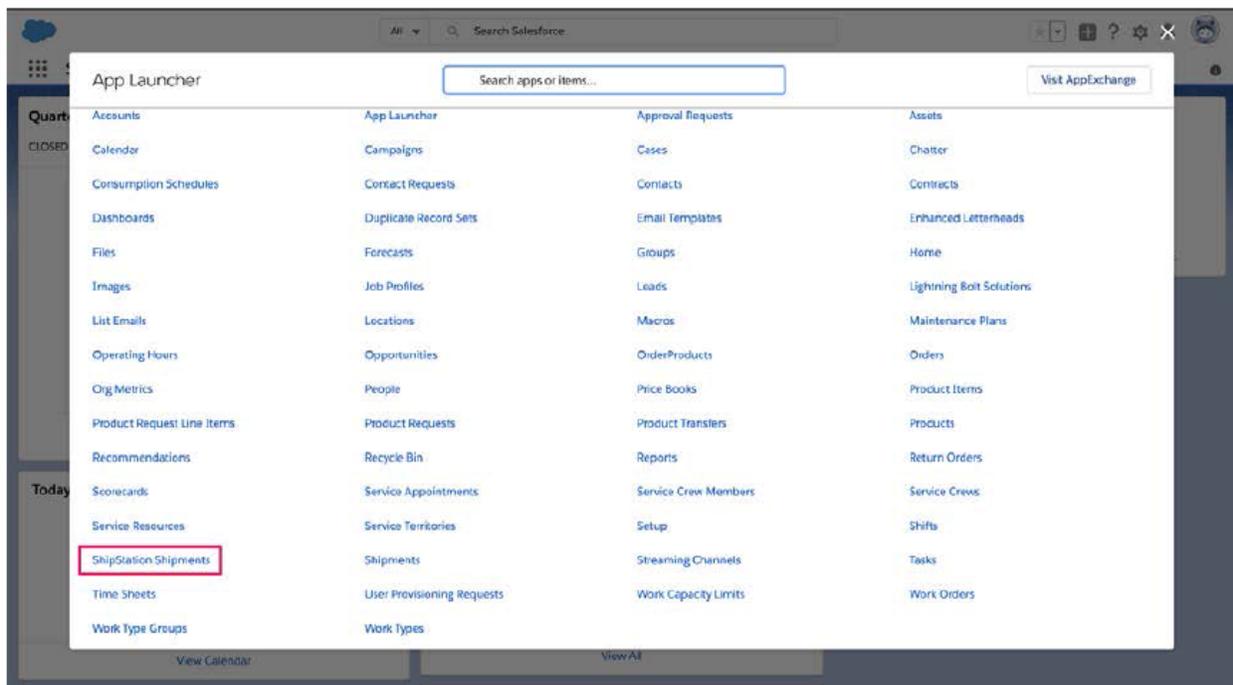
The screenshot shows the same Salesforce Setup interface as the previous one, but with the 'Save' button in the top toolbar highlighted in red. The 'Additional Cost' field is now visible in the 'Order Detail' section of the page layout, indicating that the save action was successful.

Order Information (Header visible on edit only)	Contract Number	Order Amount	Order Type	Status	Shipping Address	Activated Date
Order Owner: Sample Text	Sample Text	\$123.45	Sample Text	Sample Text	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	11/14/2019 7:26 AM
Order Number: 007N-2004-001234						
Account Name: Sample Text						
Order Start Date: 11/14/2019						
Customer Authorized By: Sample Text						
Company Authorized By: Sample Text						
Billing Address: Suite 300, The Landmark @ One Market						

Viewing ShipStation Shipment Records

Additionally, there is instruction on how to view ShipStation Shipments via a list view.

- Select the app launcher and click the **ShipStation Shipments** tab



- Click the drop down arrow and select **All ShipStation Shipments**



ShipStation Shipments

Recently Viewed

2 items

LIST VIEWS

- All
- 1 All ShipStation Shipments
- 2 ✓ Recently Viewed (Pinned list)

New Import Change Owner

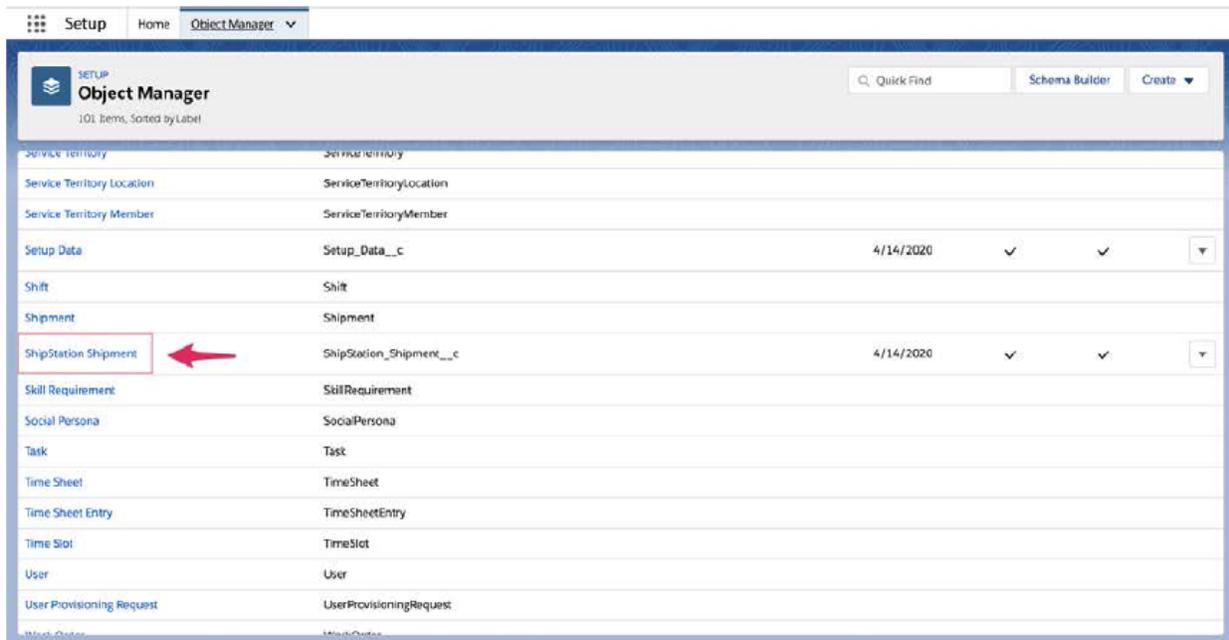
Search this list...

Updating Order Status

In order to update the Order record's status value once a Shipment record is created in the org by the ShipStation application, the Admin of your Salesforce Org will need to create a Process using Process Builder.

Creating a Lookup Field

- If you are using a custom Order object, you must create a lookup field to that object on the ShipStation Shipment object. **(Note: The ShipStation Shipment lookup field to the Order object will be pre-mapped in Setup.)**
- In Object Manager, select the ShipStation Shipment object



The screenshot shows the Salesforce Setup interface, specifically the Object Manager page. The page title is "Object Manager" with a sub-header "101 Items, Sorted by Label". The main content is a table of objects. The "ShipStation Shipment" object is highlighted with a red box, and a red arrow points to it from the left. The table has columns for object name, API name, creation date, and status.

Object Name	API Name	Created	Active	Visible	Actions
Service Territory	ServiceTerritory				
Service Territory Location	ServiceTerritoryLocation				
Service Territory Member	ServiceTerritoryMember				
Setup Data	Setup_Data__c	4/14/2020	✓	✓	▼
Shift	Shift				
Shipment	Shipment				
ShipStation Shipment	ShipStation_Shipment__c	4/14/2020	✓	✓	▼
Skill Requirement	SkillRequirement				
Social Persona	SocialPersona				
Task	Task				
Time Sheet	TimeSheet				
Time Sheet Entry	TimeSheetEntry				
Time Slot	TimeSlot				
User	User				
User Provisioning Request	UserProvisioningRequest				

- 1) Click into **Fields & Relationships**
- 2) Click **New**

Setup Home Object Manager

SETUP > OBJECT MANAGER
ShipStation Shipment

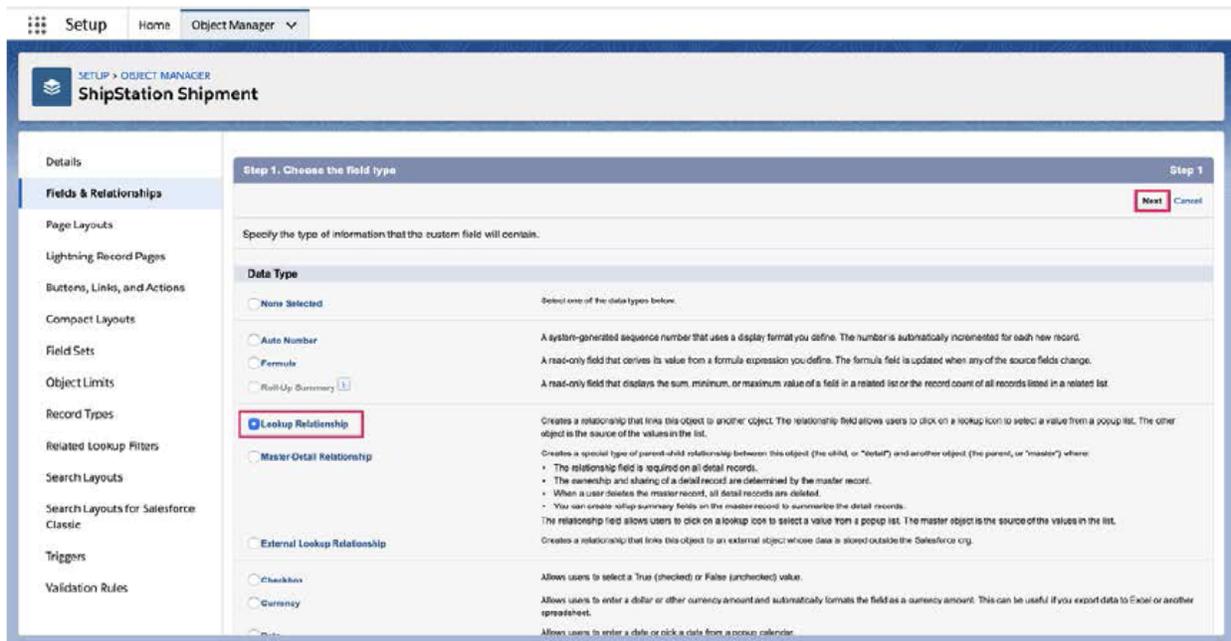
Details **1**

Fields & Relationships
9 Items, Sorted by Field Label

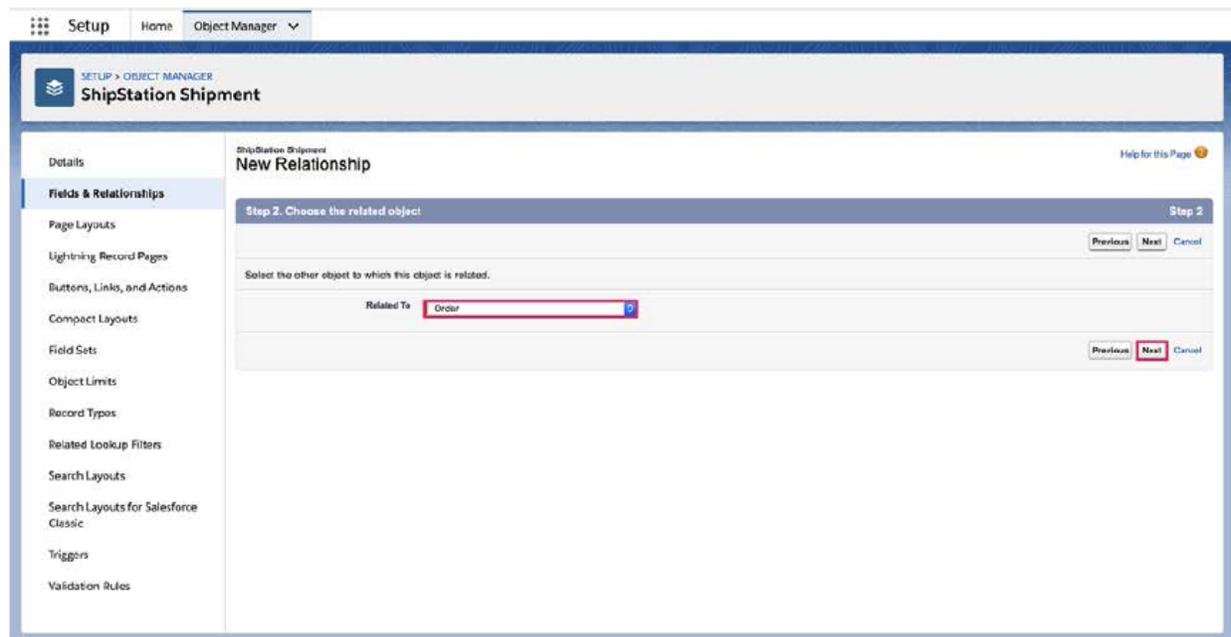
Quick Find **New** Field Dependencies Set History Tracking **2**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sales Order Id	Sales_Order_Id__c	Text(255)		
Shipping Carrier Id	Shipping_Carrier_Id__c	Text(255)		
Shipping Service Id	Shipping_Service_Id__c	Text(255)		
ShipStation Shipment Name	Name	Text(80)		✓
Tracking Number	Tracking_Number__c	Text(255)		
Transaction Id	Transaction_Id__c	Text(255)		

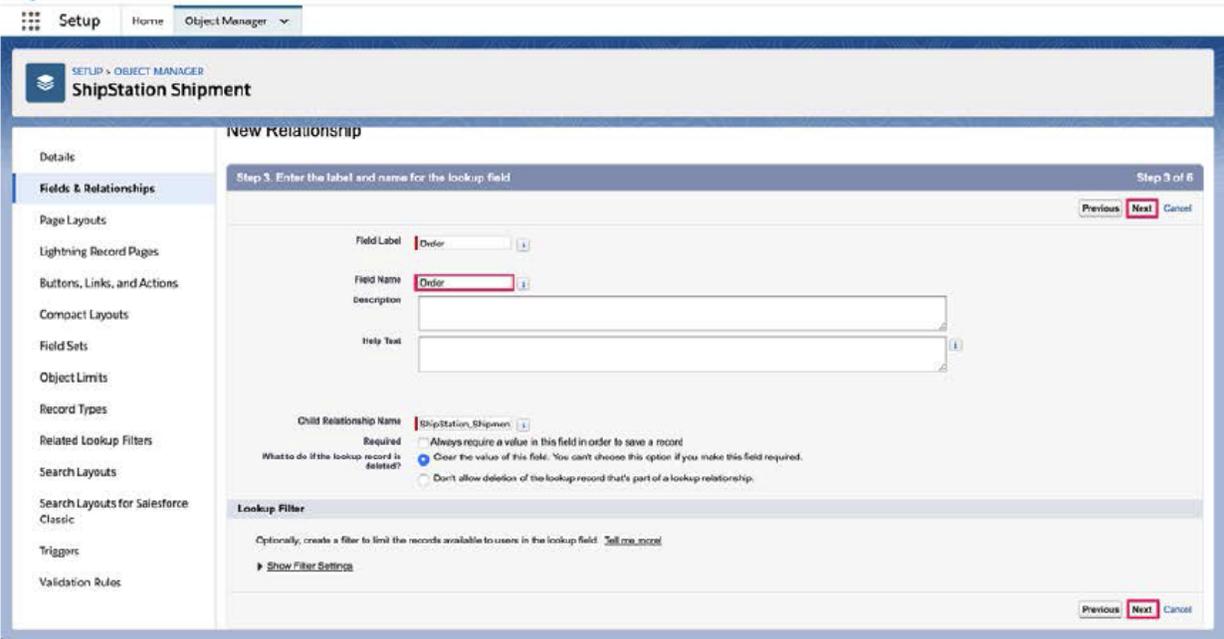
- Select **Lookup Relationship**
- Click **Next**



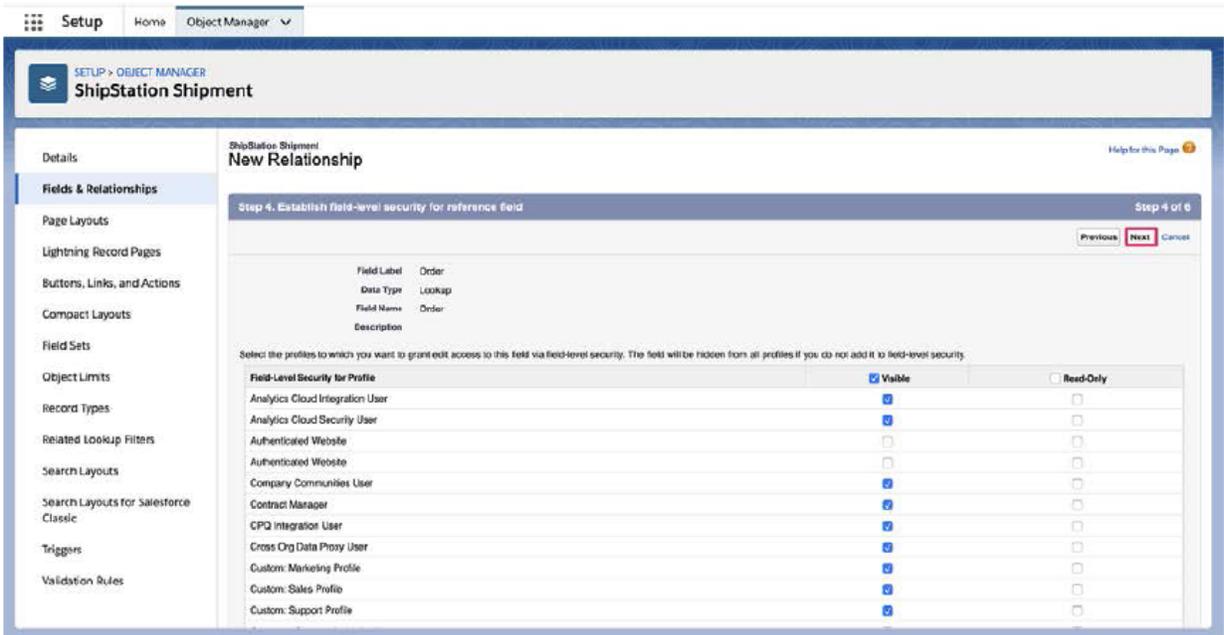
- Select the Order object you are using
- Click **Next**



- Enter a Field Name
- Click **Next**



- Establish field-level security for reference field
- Click **Next**



- Add Reference field to Page Layouts
- Click **Next**

Setup Home Object Manager

SETUP > OBJECT MANAGER
ShipStation Shipment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

ShipStation Shipment
New Relationship

Help for this Page

Step 5 of 6: Add reference field to Page Layouts

Field Label	Order
Data Type	Lookup
Field Name	Order
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	ShipStation Shipment Layout

Previous Next Cancel

● Click Save

Setup Home Object Manager

SETUP > OBJECT MANAGER
ShipStation Shipment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

ShipStation Shipment
New Relationship

Help for this Page

Step 5 of 6: Add reference field to Page Layouts

Field Label	Order
Data Type	Lookup
Field Name	Order
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

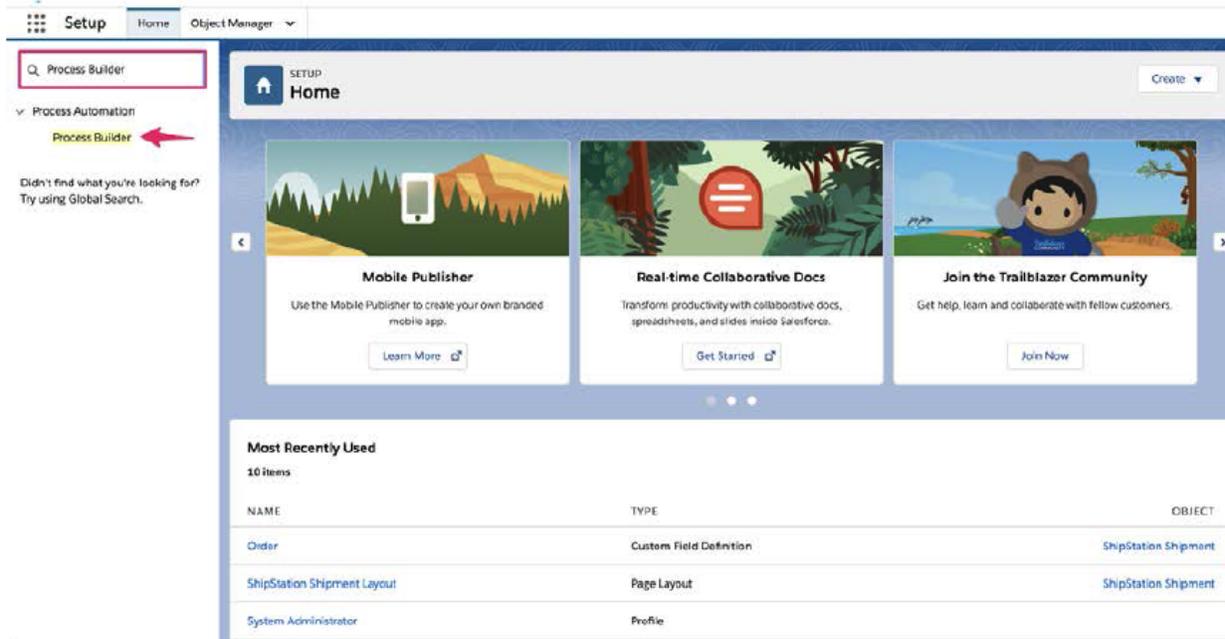
To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	ShipStation Shipment Layout

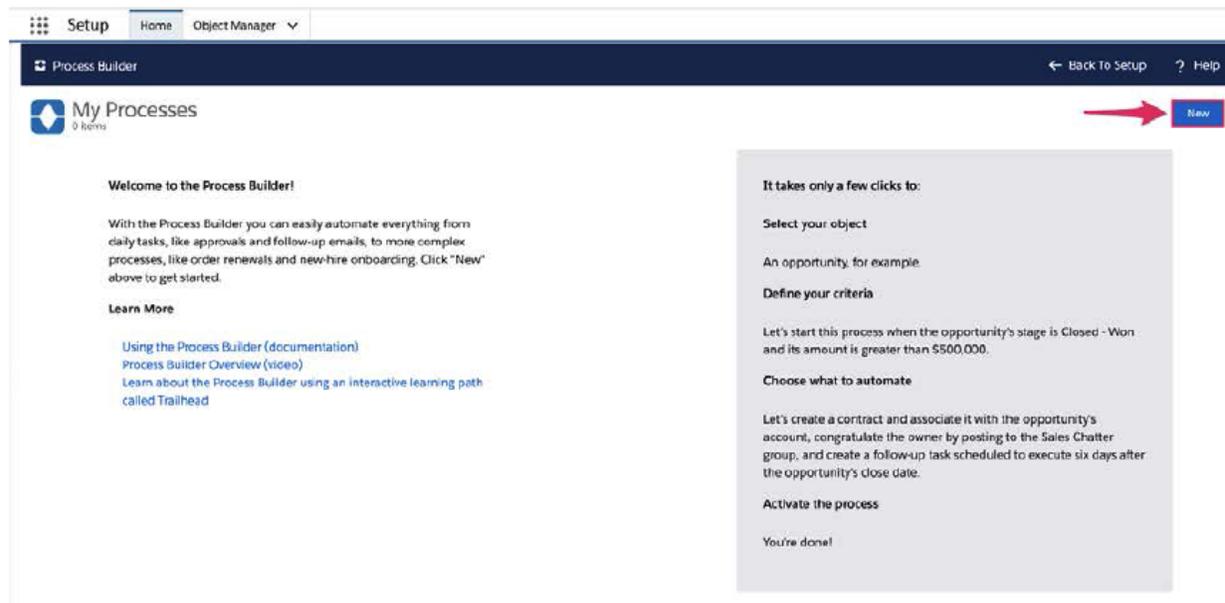
Previous Next Cancel

Process Builder

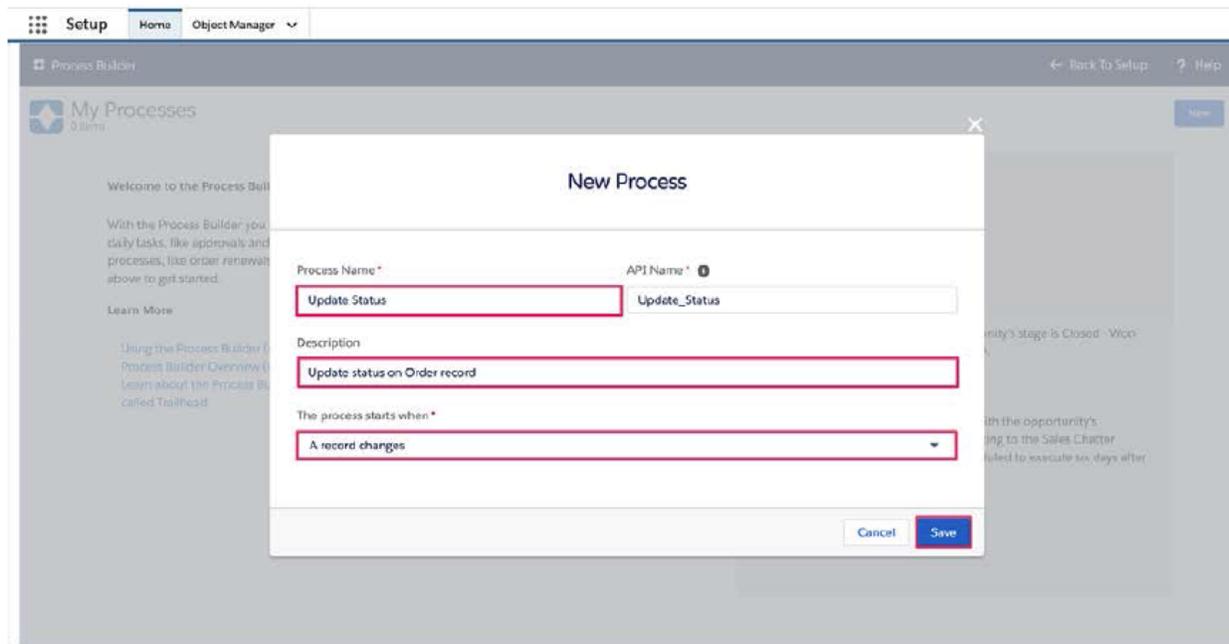
- Navigate back to Setup and search for Process Builder
- Select Process Builder located under the Process Automation category



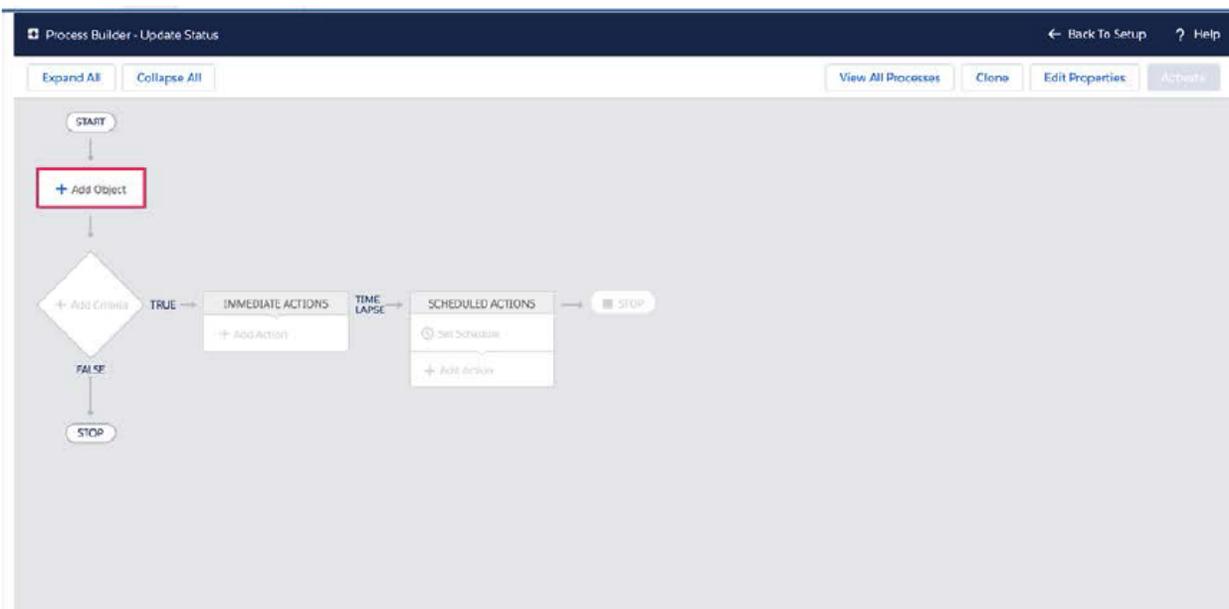
- Click **New**



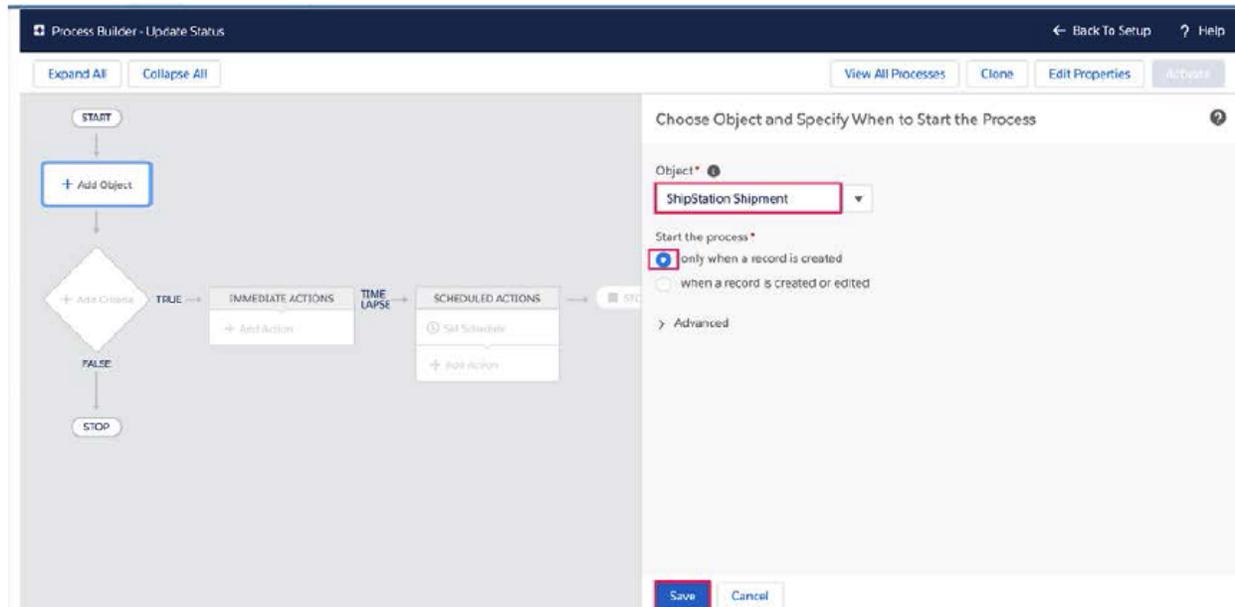
- Create a Process Name
- Optional: Add a Description
- Select “A record changes” for when the process should start



- Click **Add Object**



- Choose the ShipStation Shipment object
- Make sure that “only when a record is created” is selected
- Click **Save**



- Click into Add Criteria
- Enter a Criteria Name
- Select “No criteria-just execute the actions!”
- Click **Save**

Process Builder - Update Status

Expand All Collapse All View All Processes Clone Edit Properties Activate

Define Criteria for this Action Group

Criteria Name*

Criteria for Executing Actions*

Conditions are met

Formula evaluates to true

No criteria—just execute the actions!

Save Cancel

- Click **Add Action**
- Click the Drop down arrow for **Action Type** and select **Update Records**
- Enter an **Action Name**
- Click into **Record Type**

Process Builder - Update Status

Expand All Collapse All View All Processes Clone Edit Properties Activate

Select and Define Action

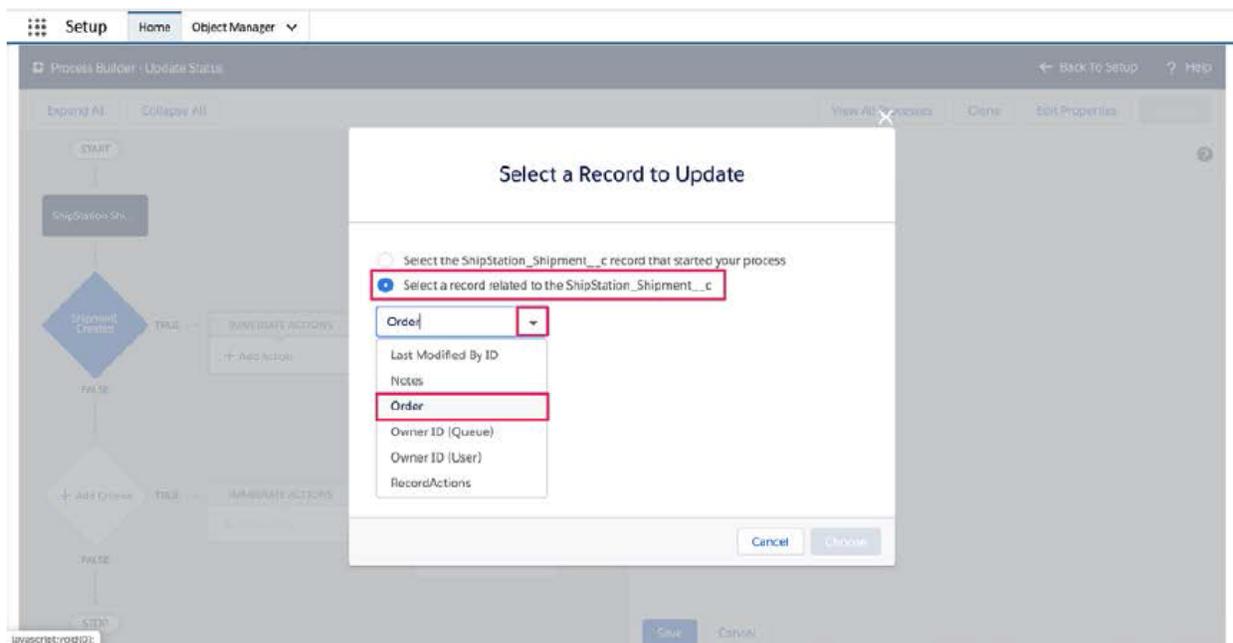
Action Type*

Action Name*

Record Type*

Save Cancel

- Select “Select a record related to the ShipStation_Shipment__c”
- Click the drop down arrow
- Select the Order object you created a lookup relationship to (making sure to select the option without the “>”, if there is one)
- Click **Choose**



- For **Field** click the drop down arrow and select **Status**
- For Value select which Status you would like Awaiting Shipment to change to
- Click **Save**

Setup Home Object Manager

Process Builder - Update Status Back To Setup Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

Select and Define Action

Action Type *
Update Records

Action Name *
Update Order Status

Record Type *
[ShipStation_Shipment__c].OrderQ

Criteria for Updating Records *
 Updated records meet all conditions
 No criteria - just update the records!

Set new field values for the records you update

Field *	Type *	Value *
Status	Picklist	Completed

+ Add Row

Save Cancel

● Click **Activate**

Setup Home Object Manager

Process Builder - Update Status Back To Setup Help

Expand All Collapse All View All Processes Clone View Properties **Activate** Read Only

Basic Troubleshooting

Issue: No orders import upon store refresh in ShipStation.

If no orders import during a ShipStation store refresh, hover over the refresh store icon in ShipStation to see if any errors are present.

If no errors are present, this typically means that ShipStation was not presented with any orders to import during the Store Refresh API call to Salesforce.

Commonly this is due to the order(s) expected to import not being in the “Awaiting Shipment” status, or the **API Name** for the “Awaiting Shipment” status not matching the required value of “AwaitingShipment”

Additionally, this could be due to the order(s) not having any products added, or there not being a Shipping Address present.

Note: ShipStation cannot recognize the “Shipping Address” **compound field**, and this will need to be broken out into separate formula fields on the object acting as the Order object for “ShippingStreet”, “ShippingCity”, “ShippingState”, “ShippingPostalCode” and “Shipping Country”. In the event these fields need to be created, the plugin mapping will also need to be updated to point at these fields.

Issue: No orders import upon store refresh in ShipStation, but an error message is displayed

If no orders import during a ShipStation store refresh, hover over the refresh store icon in ShipStation to see if any errors are present.

Common Errors Seen

Cannot convert null value to ECommerceApi.Common.Models.CurrencyType. Path 'sales_orders[0].sales_order_items[0].price_summary.total.currency', line 1, position 96.

In this specific error, ShipStation is receiving a null value for the “**Currency Type**” field on the Order Product Object, so you will want to make sure that the “**Currency Type**” field has the correct permissions for the plugin to view the field, as well as make sure that there is a value associated with the field. **Currency Type is a required field for ShipStation to import orders.**

Verify field Visibility Permissions

- Navigate to **Setup -> Objects and Fields -> Object Manager -> Order Product -> Fields and Relationships -> Currency Type -> Set Field Level Security**

Verify fields have a value

- Begin by navigating to **Setup -> Objects and Fields -> Object Manager -> Order Product -> Page Layouts**
- Confirm that the “**Currency Type**” field has been moved from the available fields to the page layout
- Navigate back to the order in question and click on the product(s) contained in the order
- Confirm the **Currency Type** field is present and has a value

Note: This will also apply to “Currency Type” and “MSRP” on the Product Object

The errors will look similar and will mention the specific field just as the previous example did.

*You will need to navigate to **Setup -> Objects and Fields -> Object Manager -> Product -> Fields and Relationships -> Currency Type -> Set Field Level Security***

Setup -> Objects and Fields -> Object Manager -> Product -> Fields and Relationships -> MSRP -> Set Field Level Security

*These fields will also need to be added to the **Product Page Layout** and **MUST** contain a value when attempting to import orders into ShipStation*

Common Errors cont

```
{"Method":"ExportSalesOrders","Body":{"message":"156: Unknown field \\\"Synced__c\\\" on object\\\"Opportunity\\\"\",\"external_warnings\":null,\"external_errors\":null,\"transaction_id\":\"00000000-0000-0000-0000-000000000000\",\"metadata\":{\"null}}\",\"Status\":500,\"MarketplaceId\":\"XX\",\"StoreId\":\"XXXX\",\"SellerId\":\"XXXXX\",\"RecordCount\":0}
```

This error is indicative of the “Synced” field required to Sync orders to ShipStation not being present on the object that is acting as the “Order” object.

- Navigate to **Setup** -> **Objects and Fields** -> **Object Manager** -> “**Custom Order Object Name**”-> **Fields and Relationships**
- Confirm a field name “**Synced**” exists. If it does not exist, it will need to be added.
- Click the “**Add**” button at the top of the **Fields and Relationships** page and create this field as a **checkbox** field with a **default value of unchecked** and allow the **System Administrator** to have visibility to this field.
- Note: It is a good idea to add the **Synced** field to the **Page Layout** of the object in use so that it can be referenced after a store import to see if the sync was attempted (it will become checked, if so).
- It is also useful when making order updates. Once the order has been edited, the check box can be deselected and upon saving the changes, the last modified date will update so that the changes can be imported into ShipStation upon the next store refresh

Cannot deserialize the current JSON array (e.g. [1,2,3]) into type 'ECommerceApi.Common.Responses.InternalServerErrorResponse' because the type requires a JSON object (e.g. {"name":"value"}) to deserialize correctly. To fix this error either change the JSON to a JSON object (e.g. {"name":"value"}) or change the deserialized type to an array or a type that implements a collection interface (e.g. ICollection, IList) like List<T> that can be deserialized from a JSON array.

This error is seen with the trial license of the ShipStation plugin has expired

- Navigate to **Setup** -> **Apps-> Packaging** -> **Installed Packages**
The **Version Number** as well as the **License Status** will be displayed