Installation Guide

ShipStation

Version 1.30

September 30, 2021

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Preinstallation

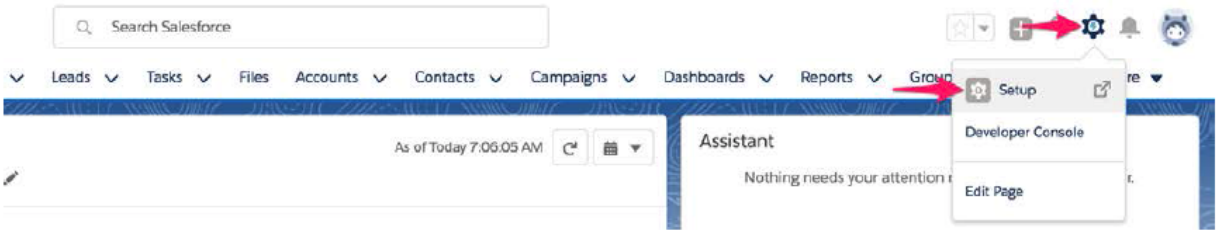
You will need the following to successfully complete this install:

- 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.



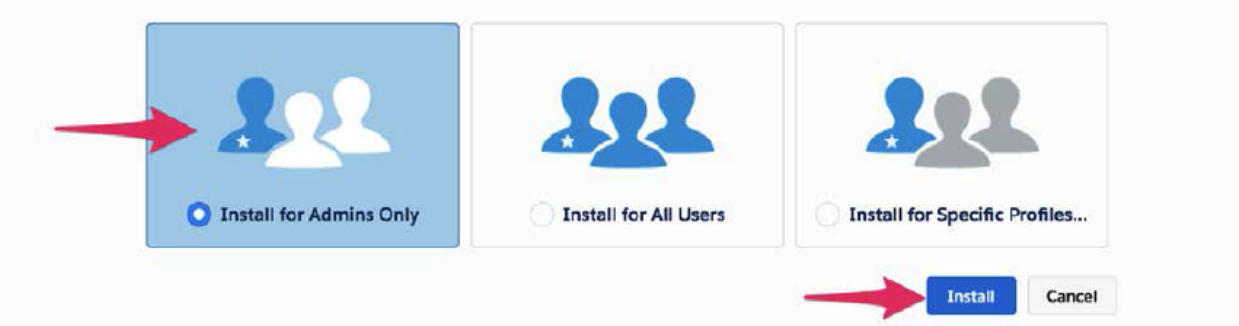
Installation

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.

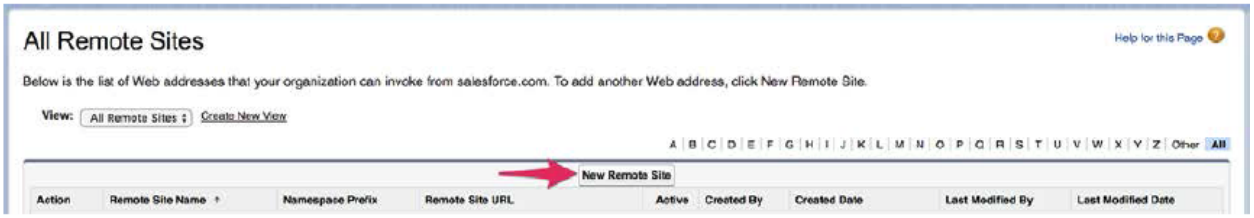


ShipStation Configuration

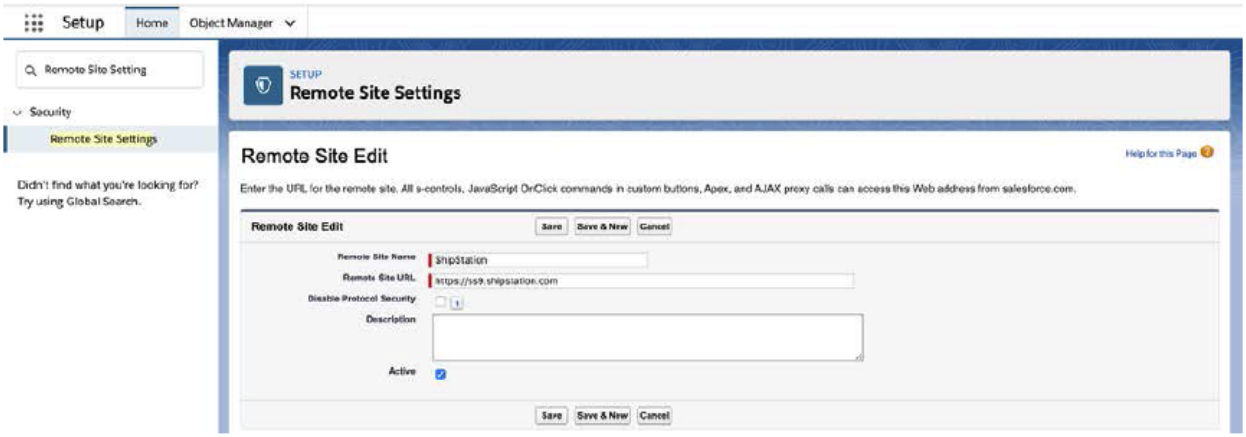
Remote Site Setting

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

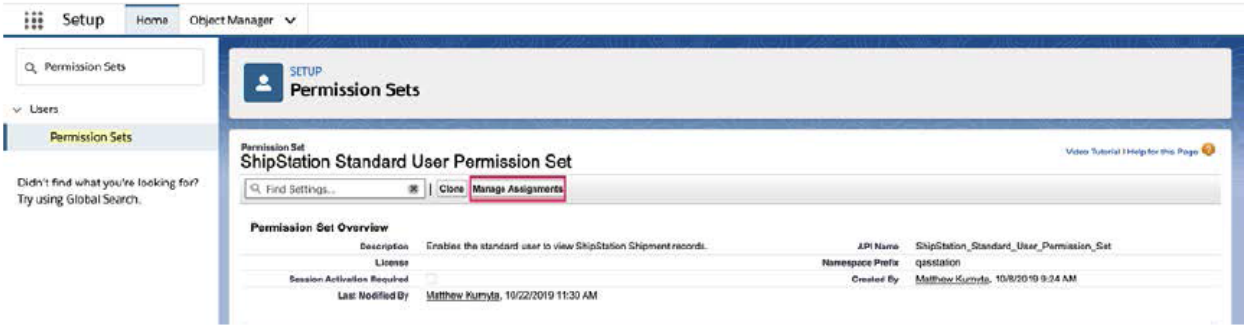
There is one permission set included with the ShipStation package. The ShipStation Standard User permission set will need to be assigned to any user that will be viewing shipment records.

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**.

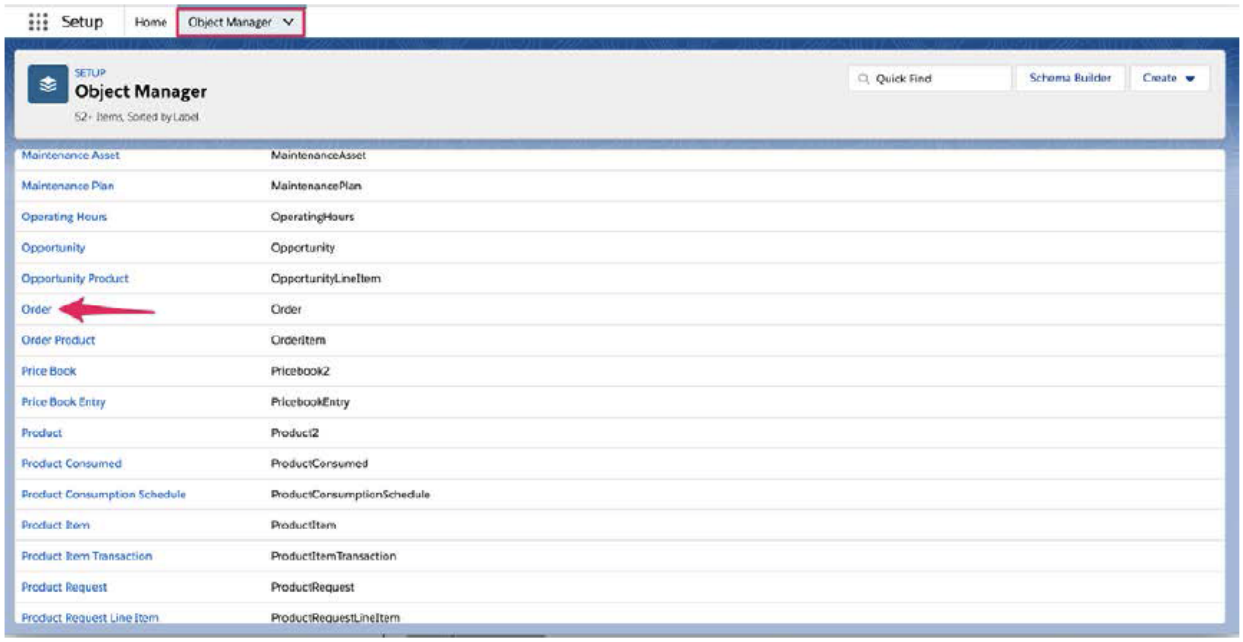
Adding Picklist Value for Status Object

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.

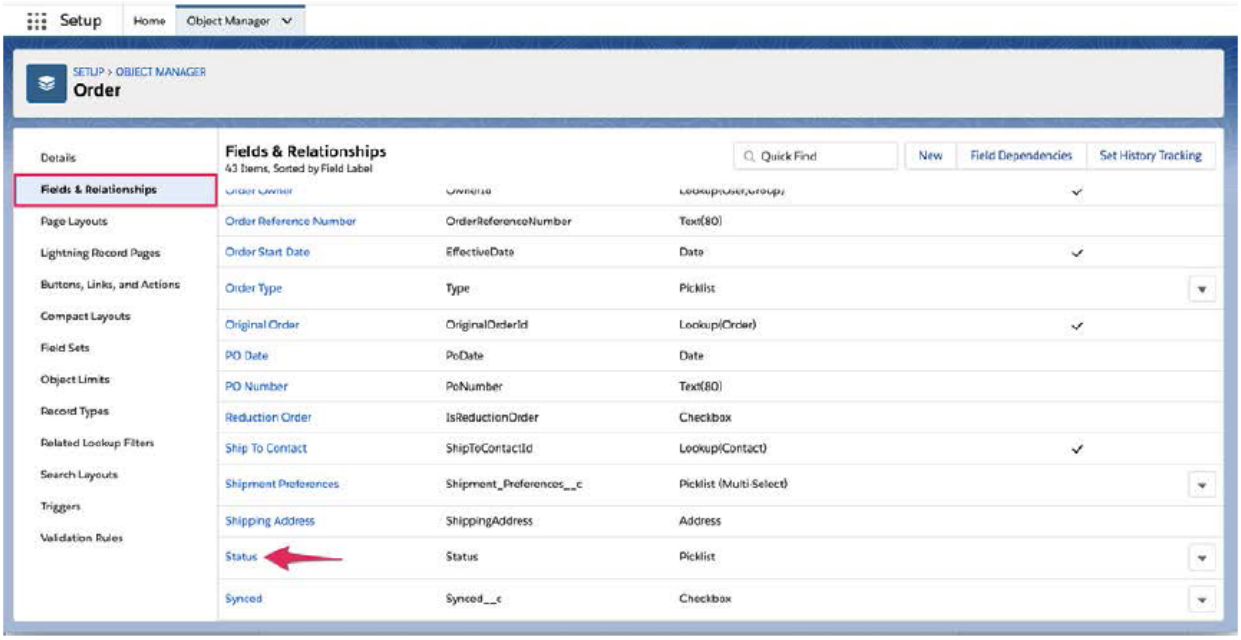
-The values required for the **label** are: **Awaiting Payment** and **Awaiting Shipment**.

-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.)*

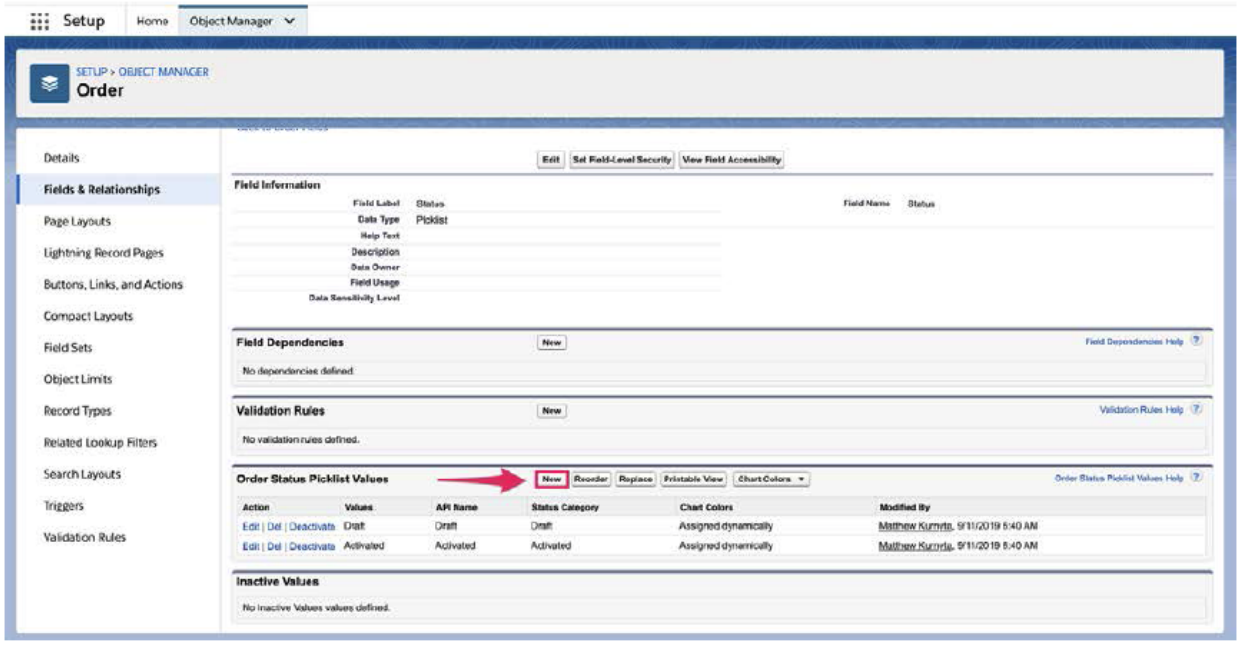
- Click into the **Object Manager** Tab
- Click into the **Order** object or the custom object that will be representing the Order object



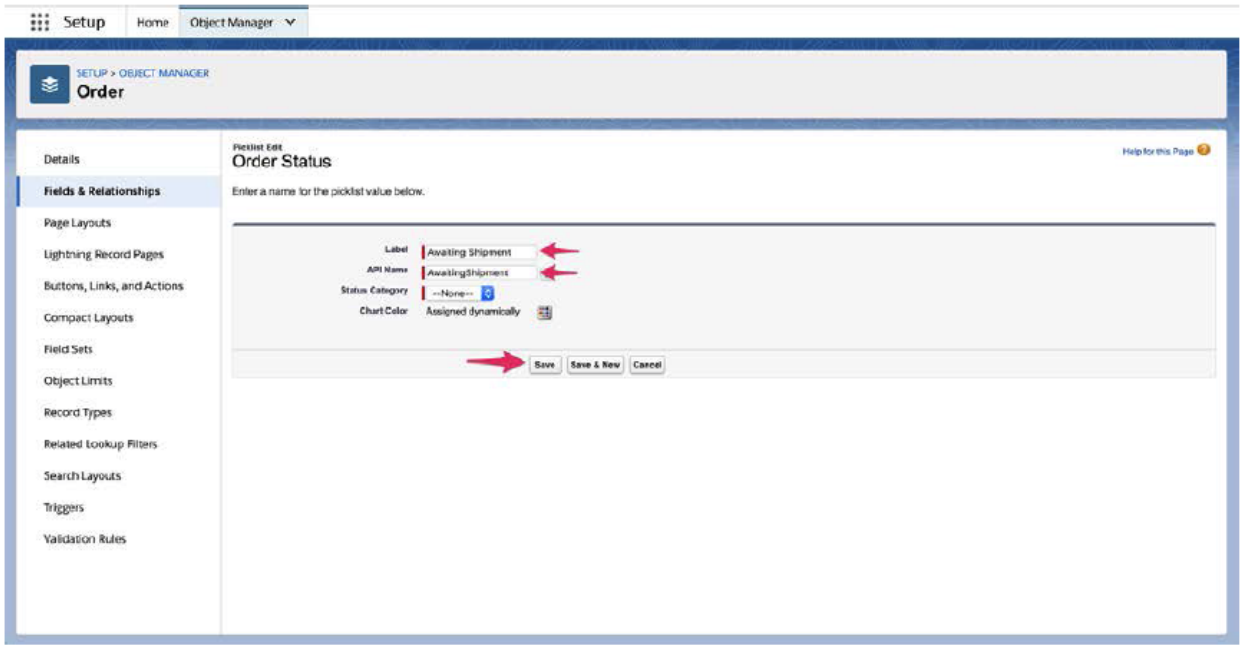
- Click into **Fields & Relationships**
- Then click into the **Status** field



- Click **New**

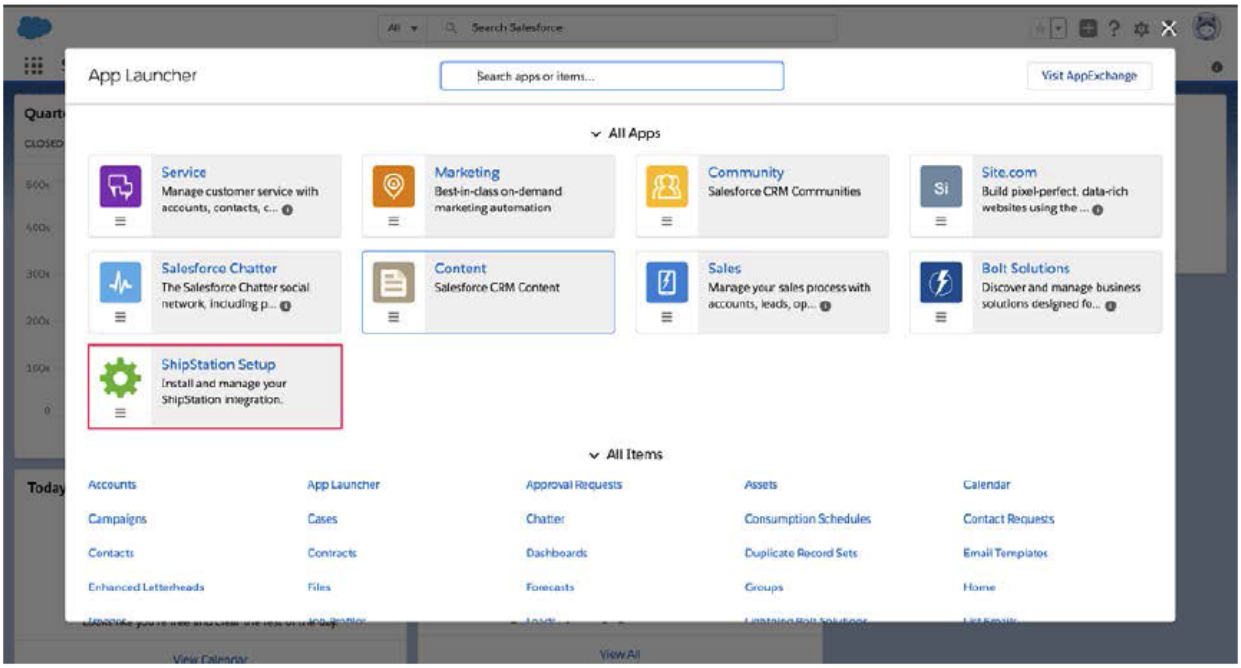


- Enter picklist value
- Enter API name
- Click **Save**



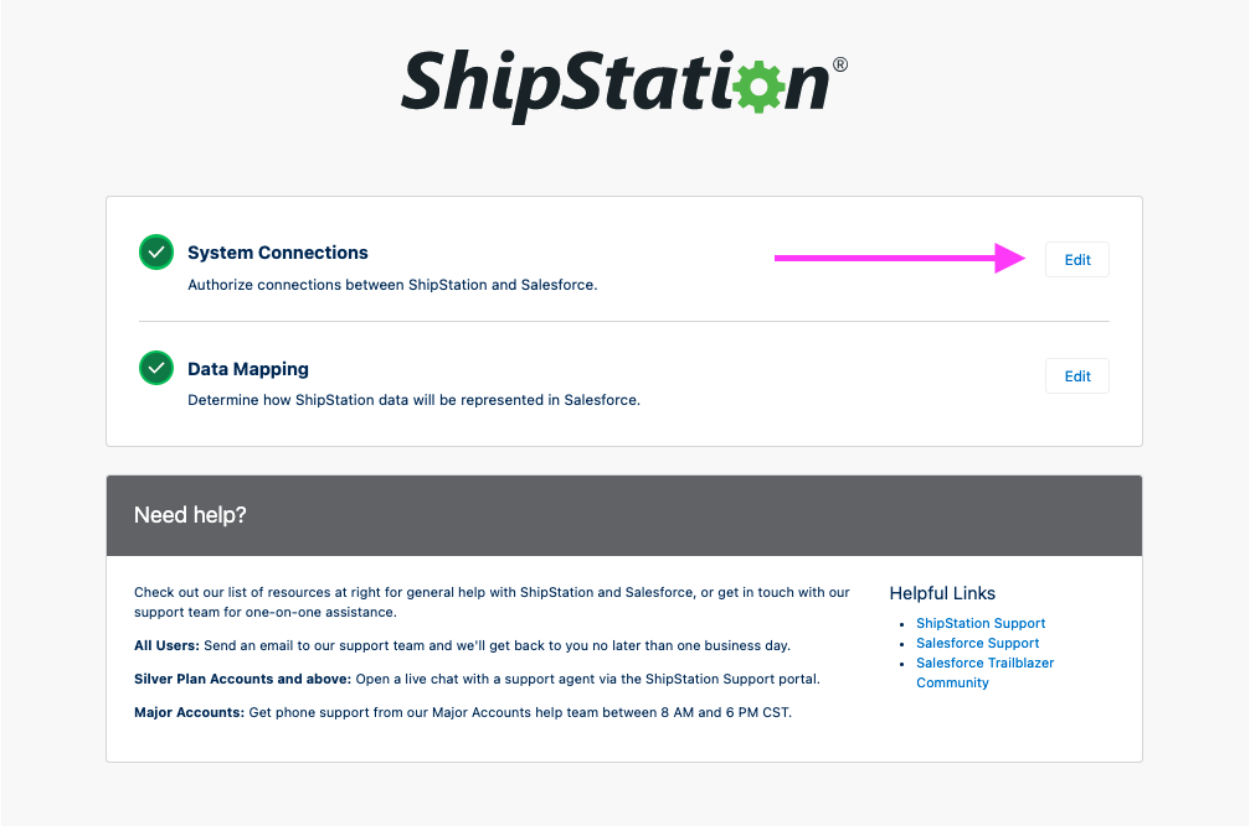
ShipStation Setup (Setup Assistant)

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**



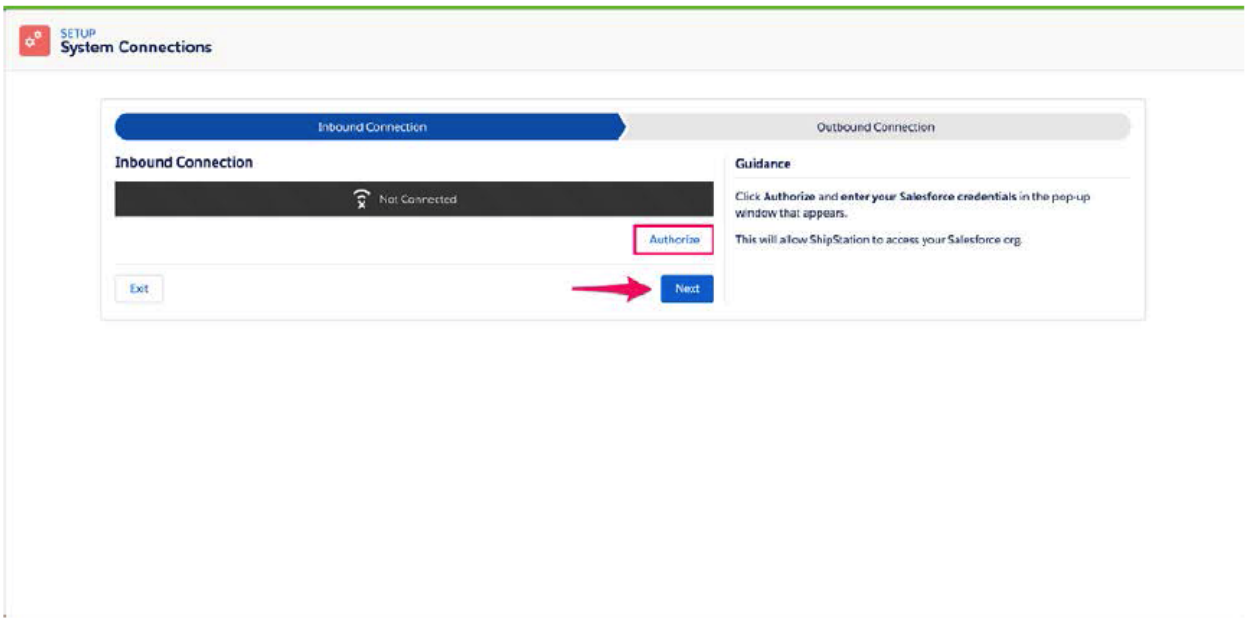
System Connections

- Click **Edit**



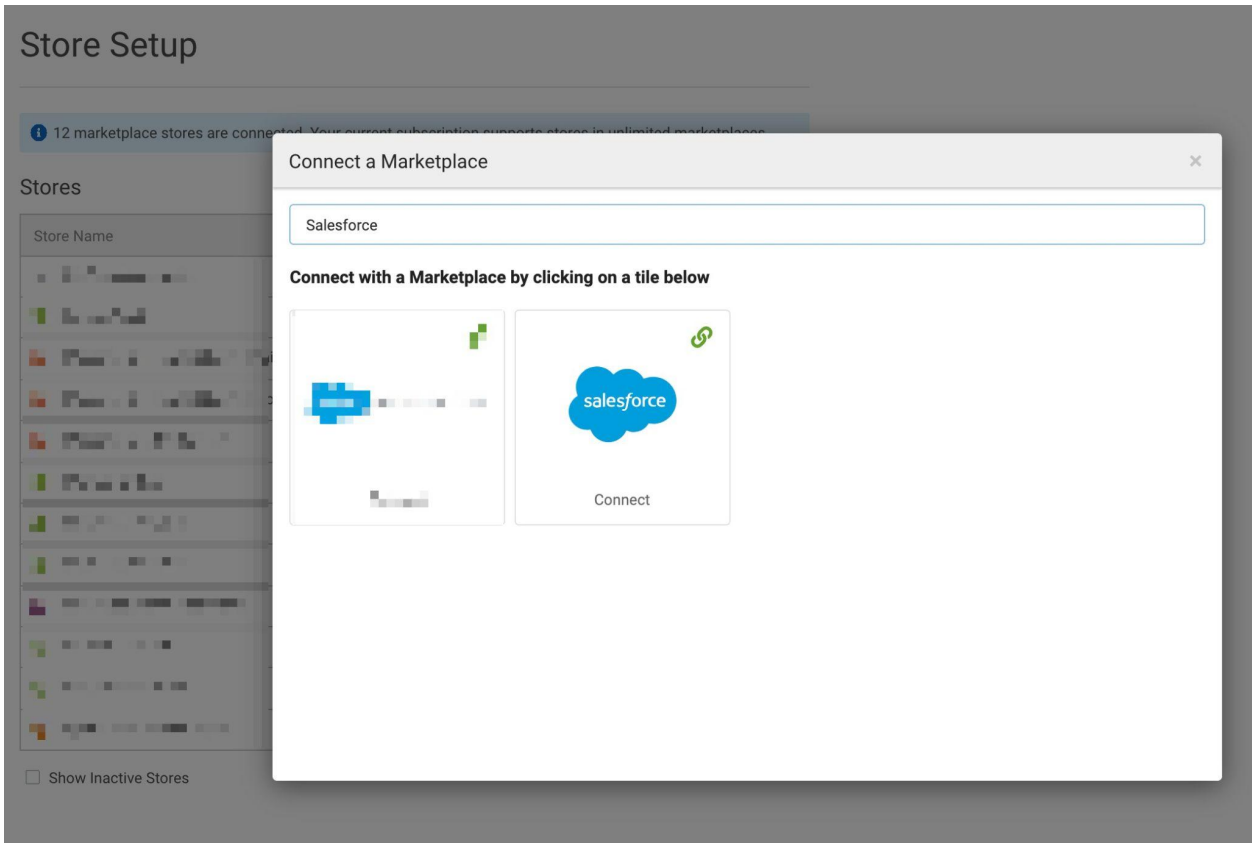
Establish an outbound and inbound connection

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

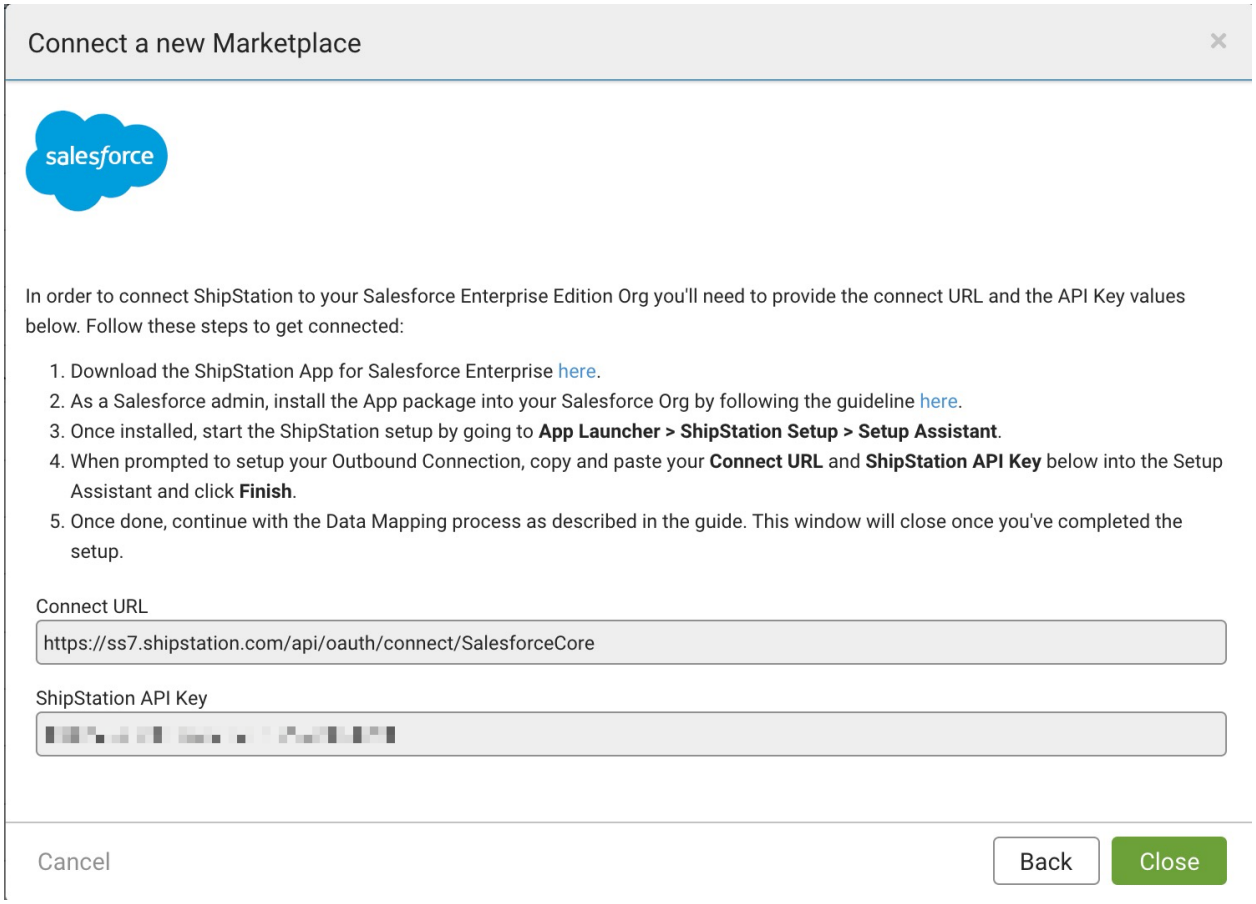


In your ShipStation account

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

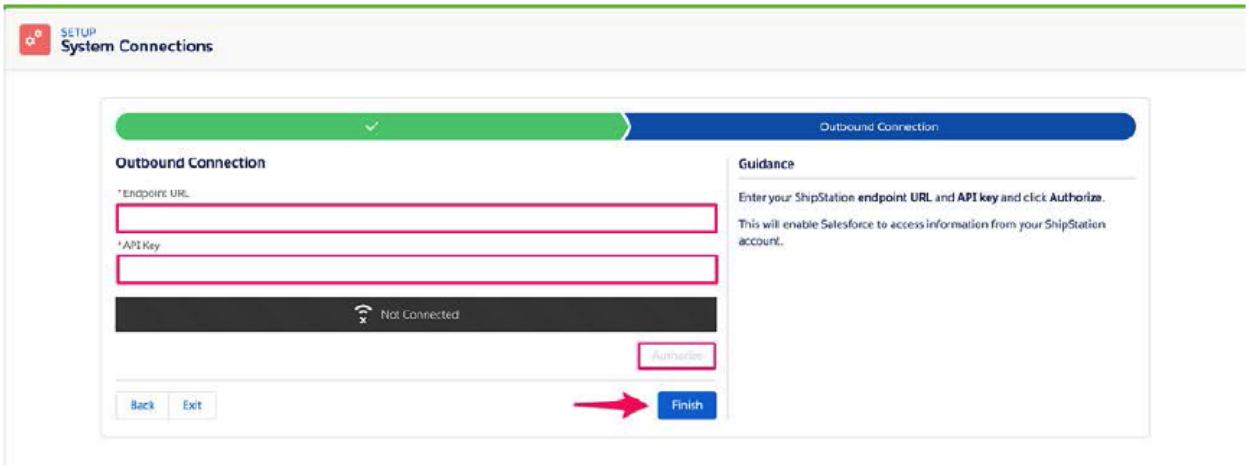


- Scroll to the bottom of the SDFC Service Agreement modal to accept **Terms and Conditions**
- Copy **“Connect URL”** and **“ShipStation API Key”** for use in the next step



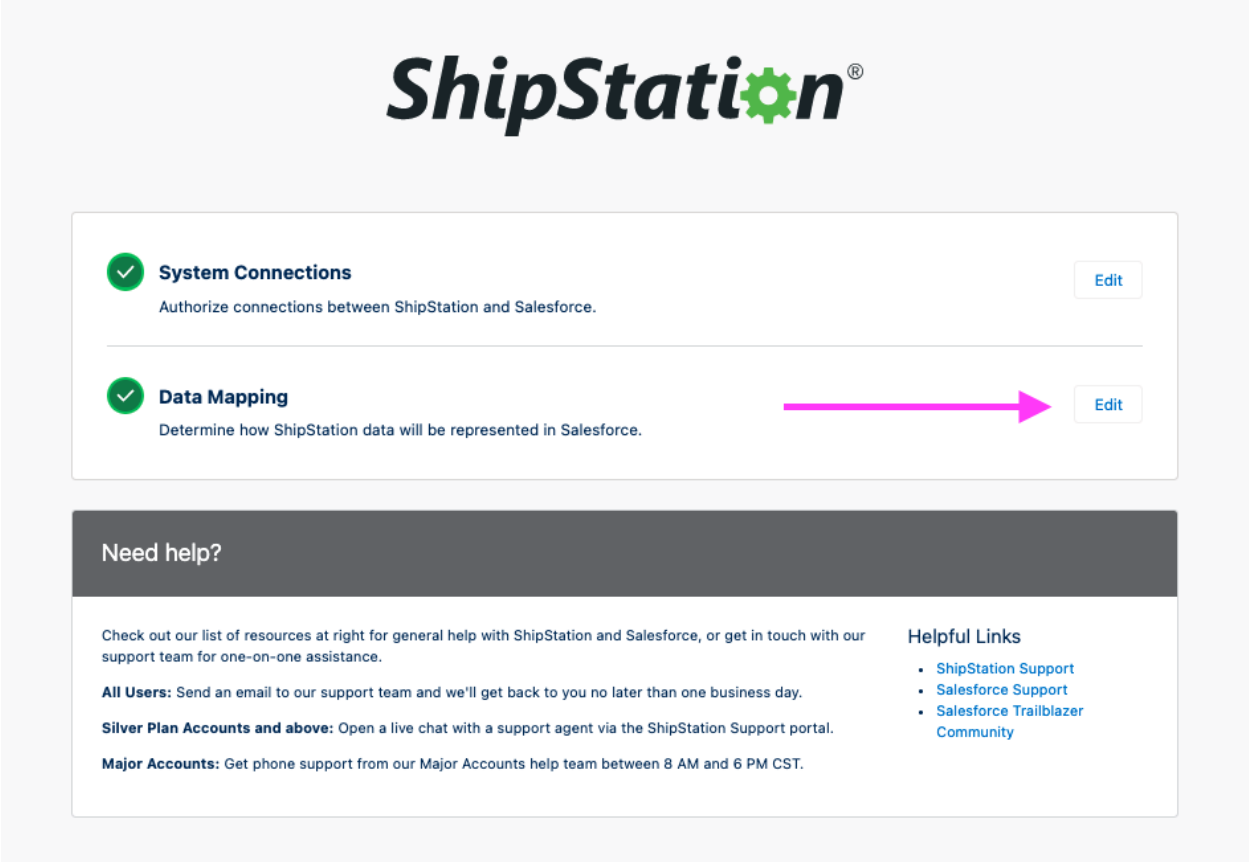
In Your Salesforce Org

- Enter your **ShipStation Endpoint URL**
- Enter your **API Key**
- Click **Authorize**
- Click **Finish**


SETUP
System Connections
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**



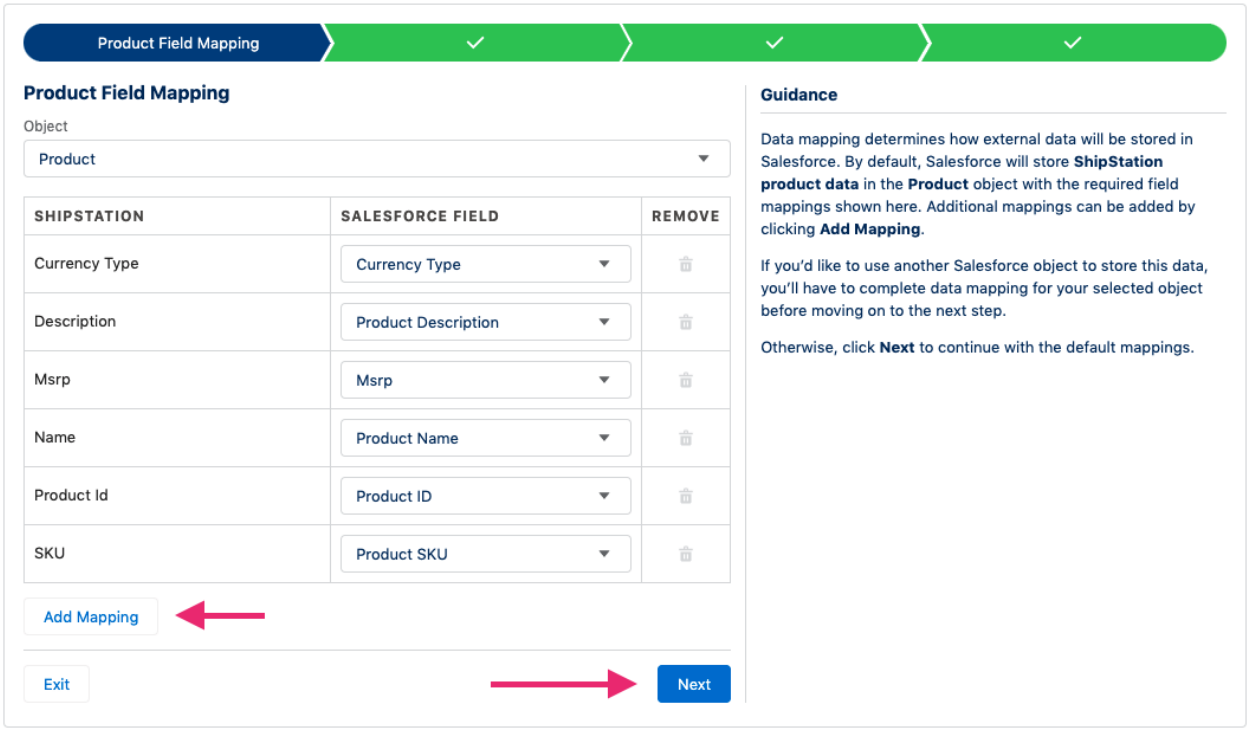
- Select a Salesforce object that will represent the ShipStation Product object

  (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**

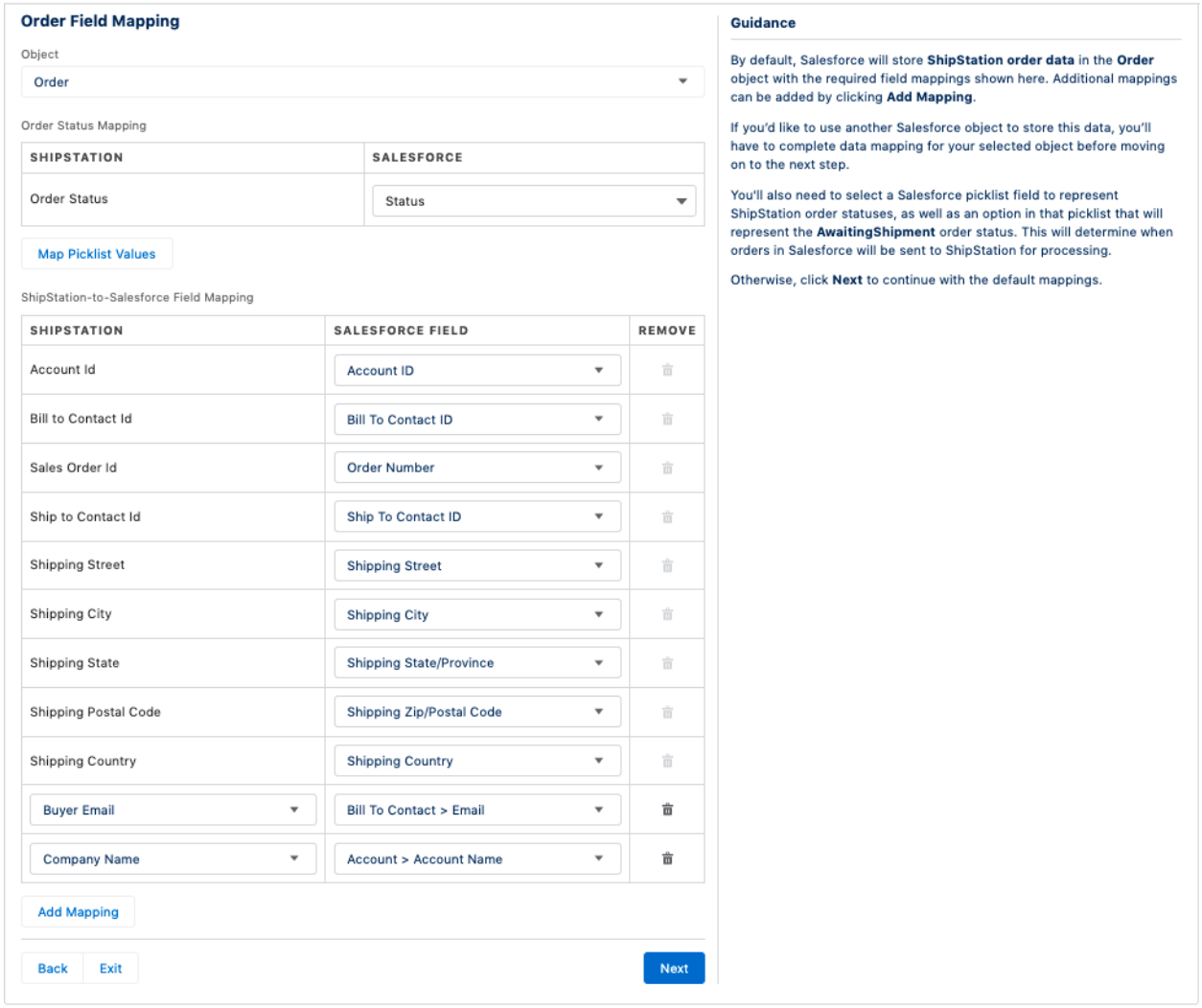


- Select a Salesforce object that will represent the ShipStation Order Object.
  (Note: this will be defaulted to the Order object. If another object in your org serves as the Order Object, you will need to create ALL fields present on the Order Object field mapping on this object, or map equivalent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

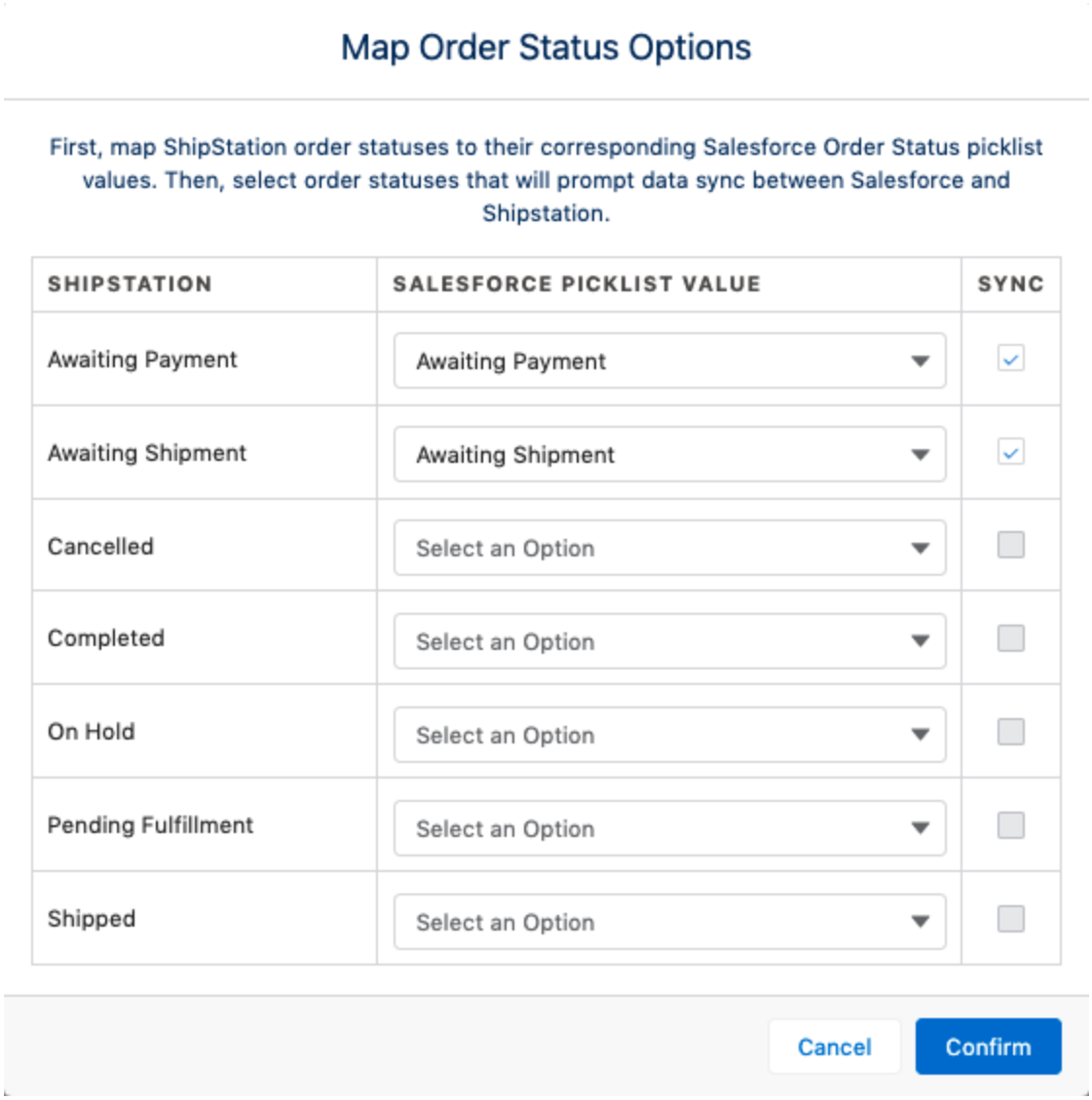


Custom Field Mapping

- 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

Mapping Order Status Values

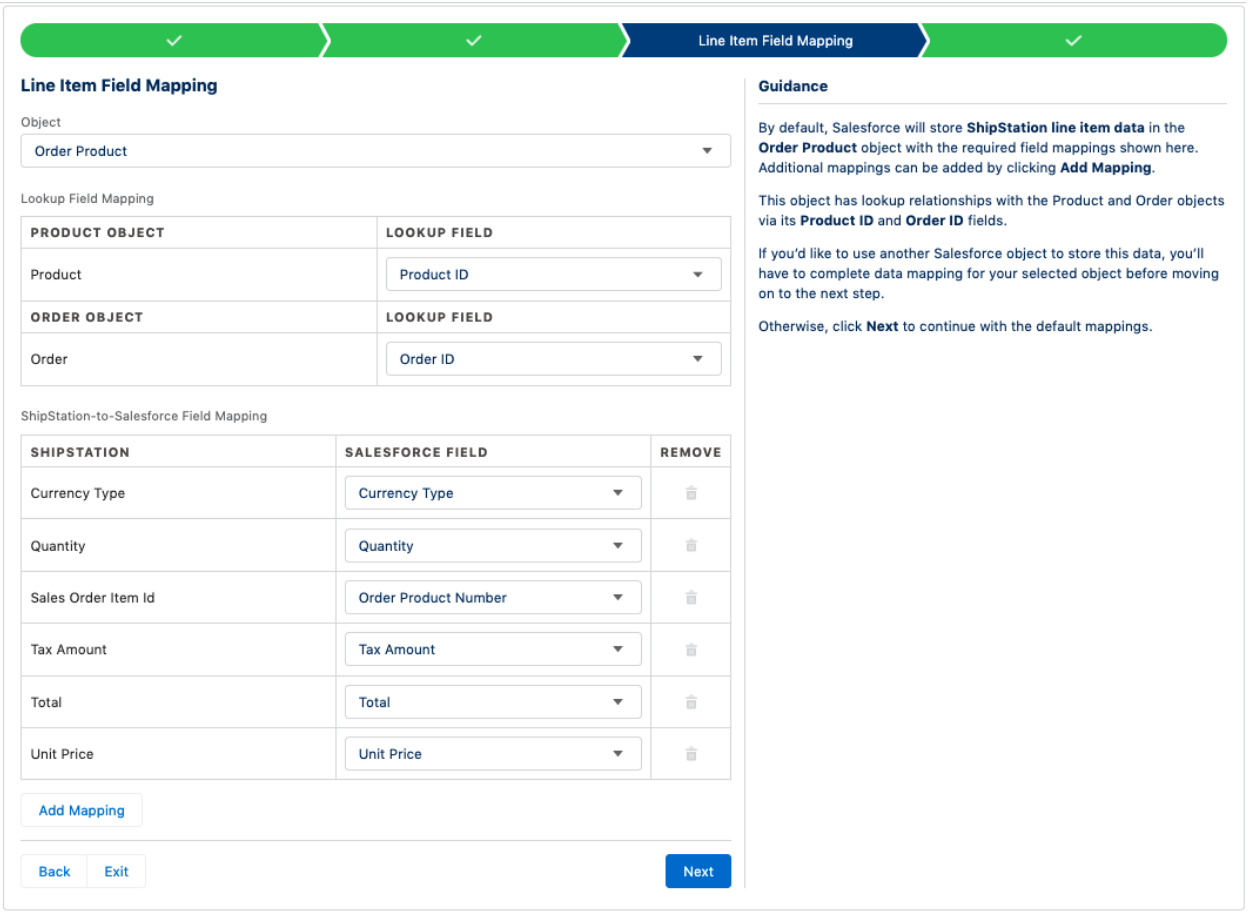
- Select **Map Picklist Values**
- Choose the Awaiting Shipment and Awaiting Payment values established in the **Adding Picklist Value for Status Object** section
- Check "**Sync**" Box next to the values in use
- Click **Confirm**



- 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.)

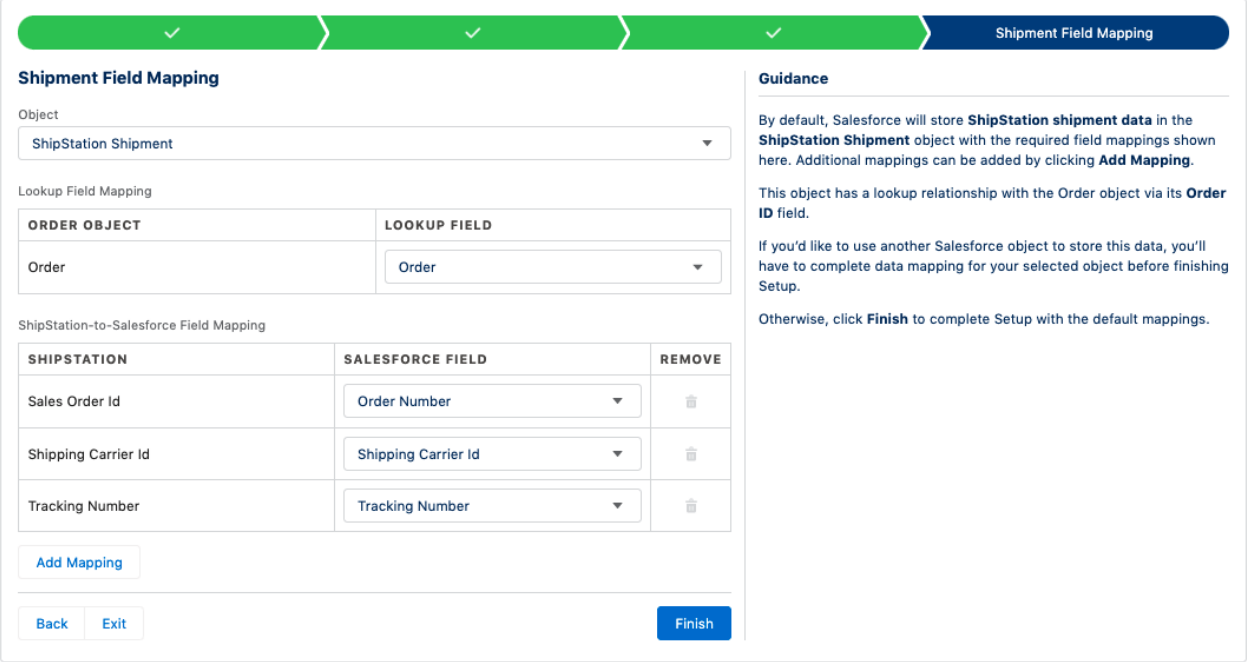
- Click **Next**



- 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

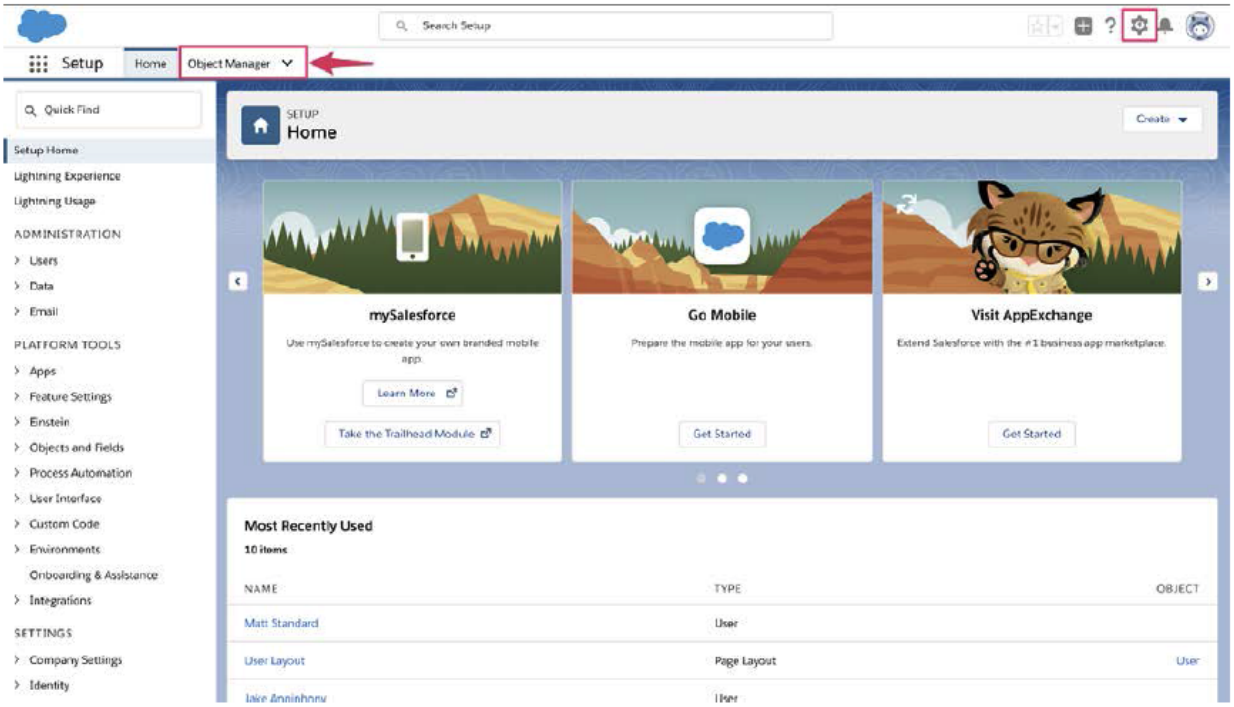
- Click **Finish**



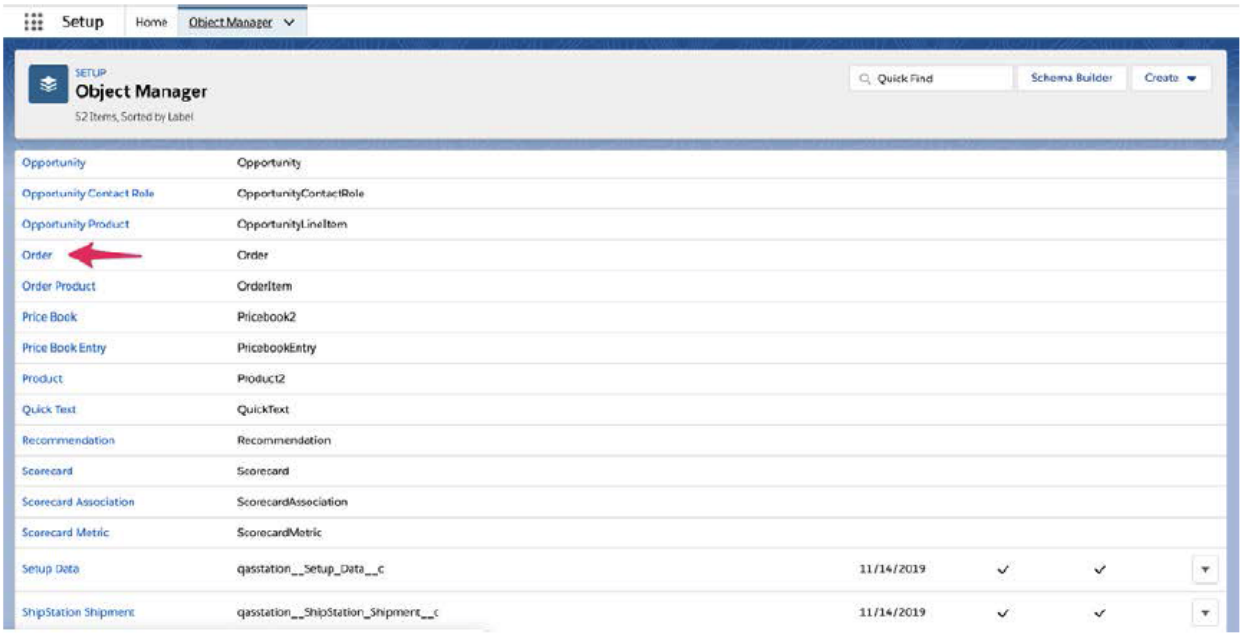
Adding A Field to a Page Layout

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.)**

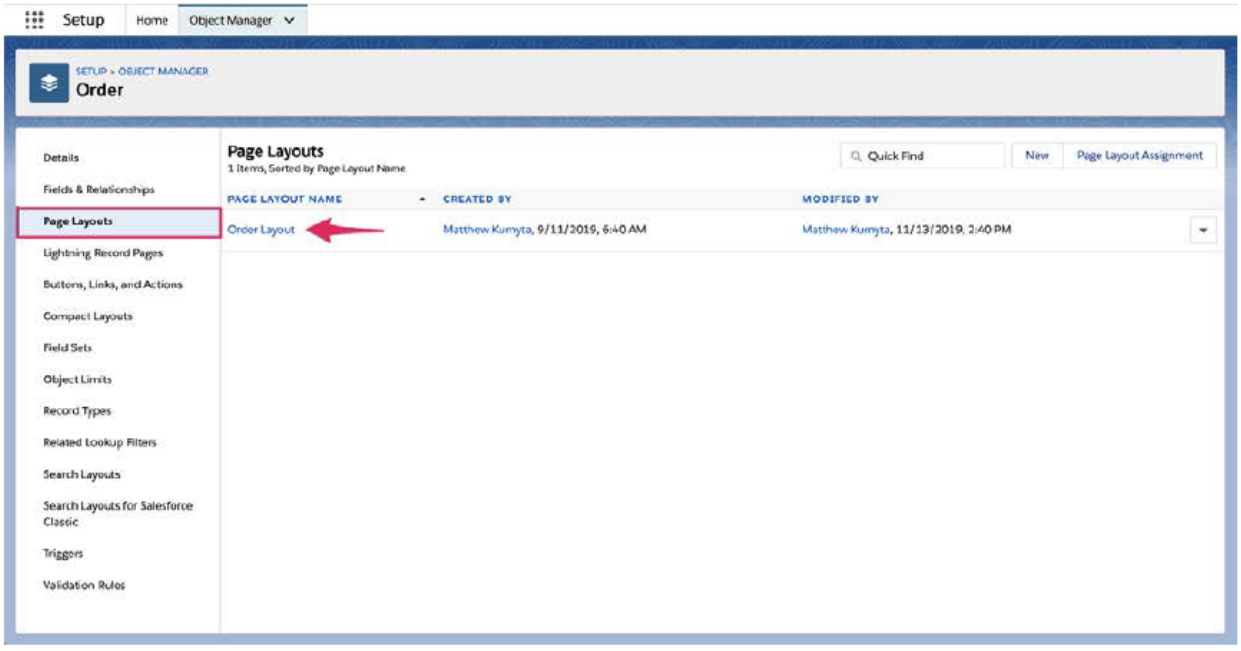
- In your Salesforce org, navigate to **Setup** by clicking the gear icon in the upper right of the page, then click on **Object Manager**



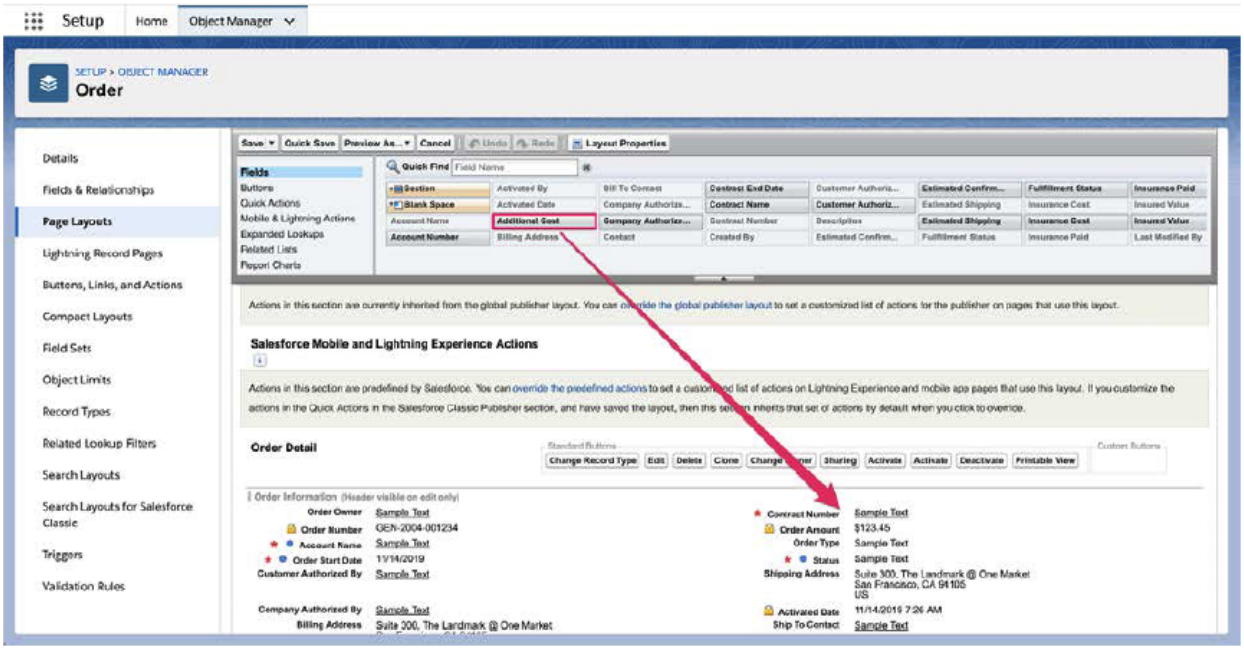
- Click **Order**



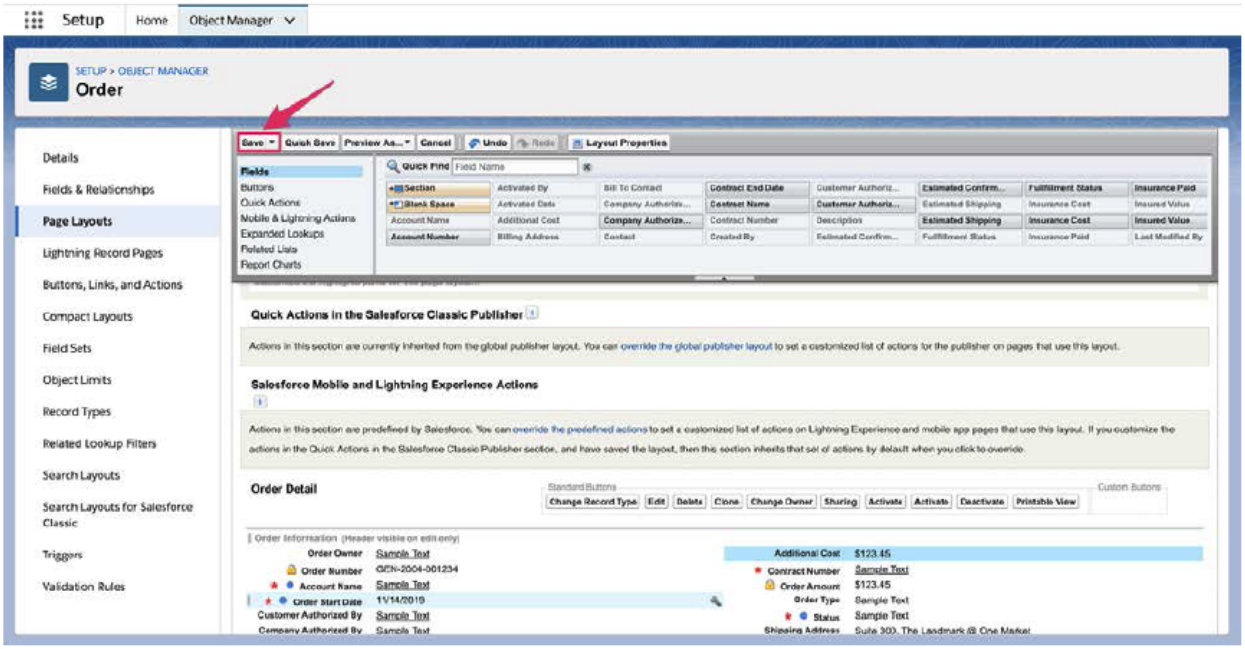
- Click **Page Layouts** then click **Order Layout**



- Click and drag the field onto the page



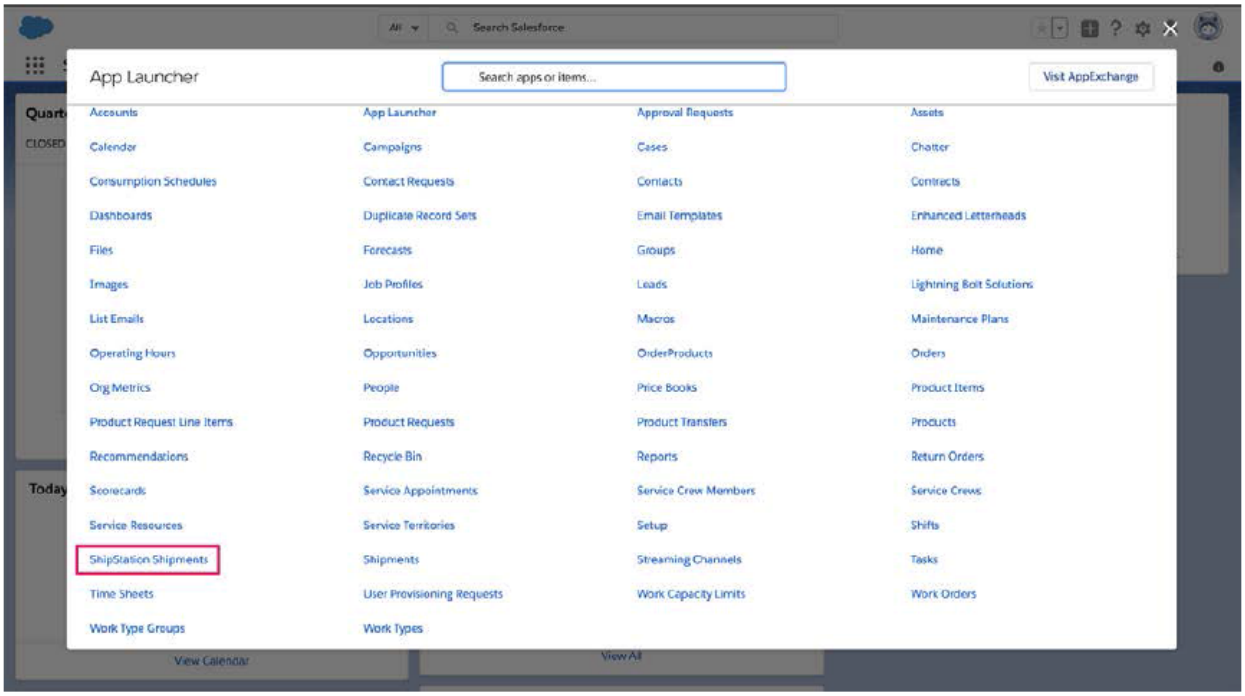
- Click **Save**



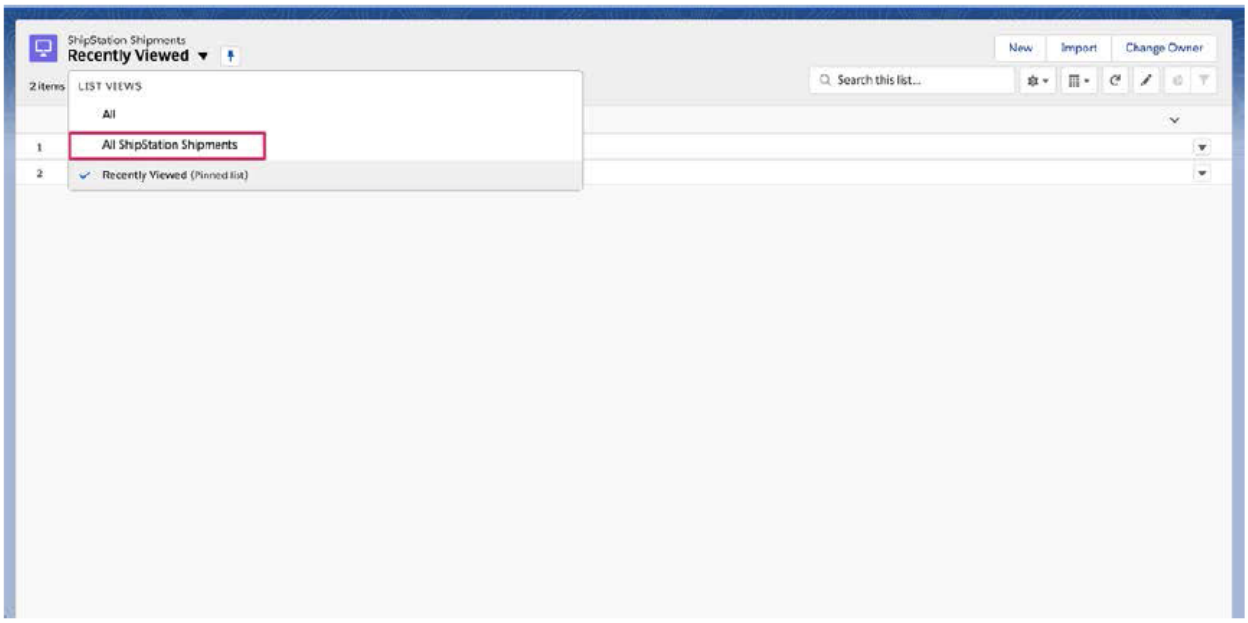
Viewing ShipStation Shipment Records

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
New
Import
Change Owner
2 items
LIST VIEWS
Search this list...
All
All ShipStation Shipments
Recently Viewed (Pinned list)

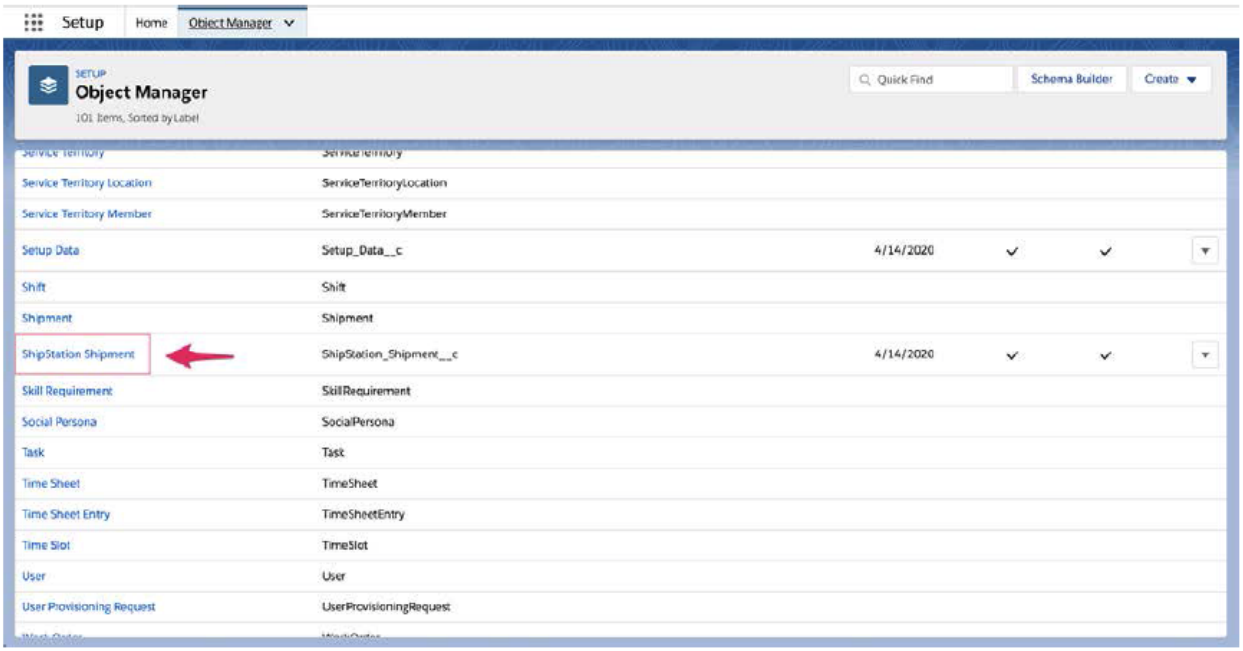
Updating Order Status

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.

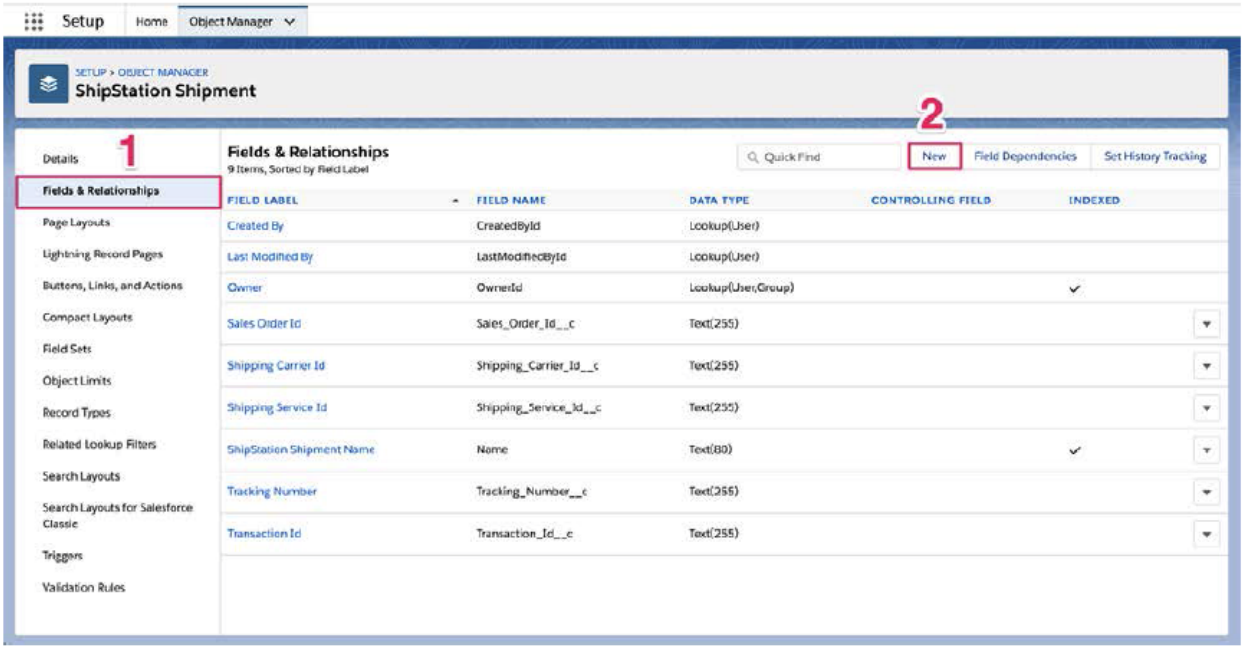
Creating a Lookup Field

- 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.)**

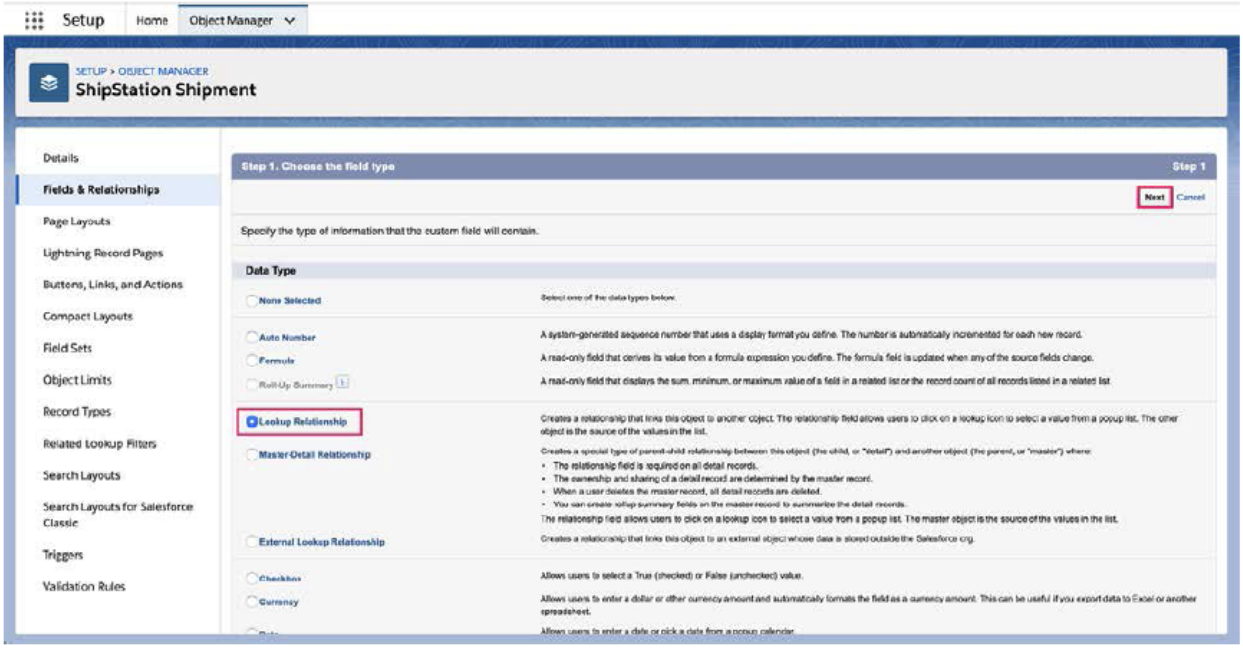
- In Object Manager, select the ShipStation Shipment object



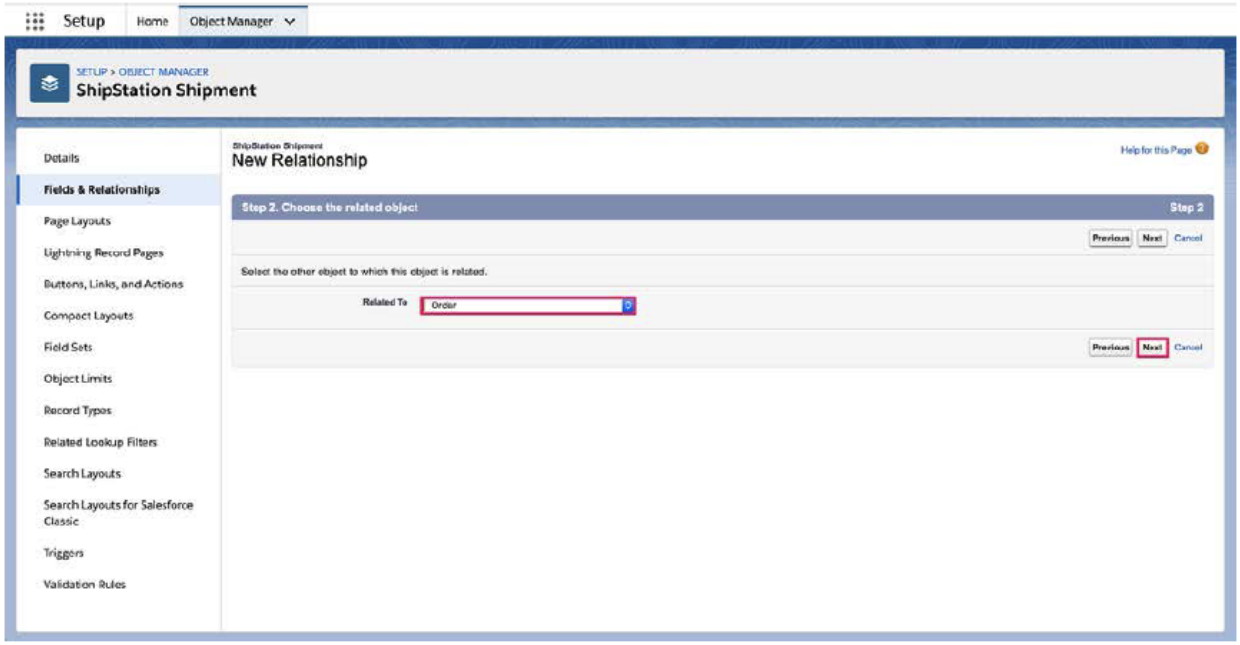
- 1) Click into **Fields & Relationships**
- 2) **Click New**



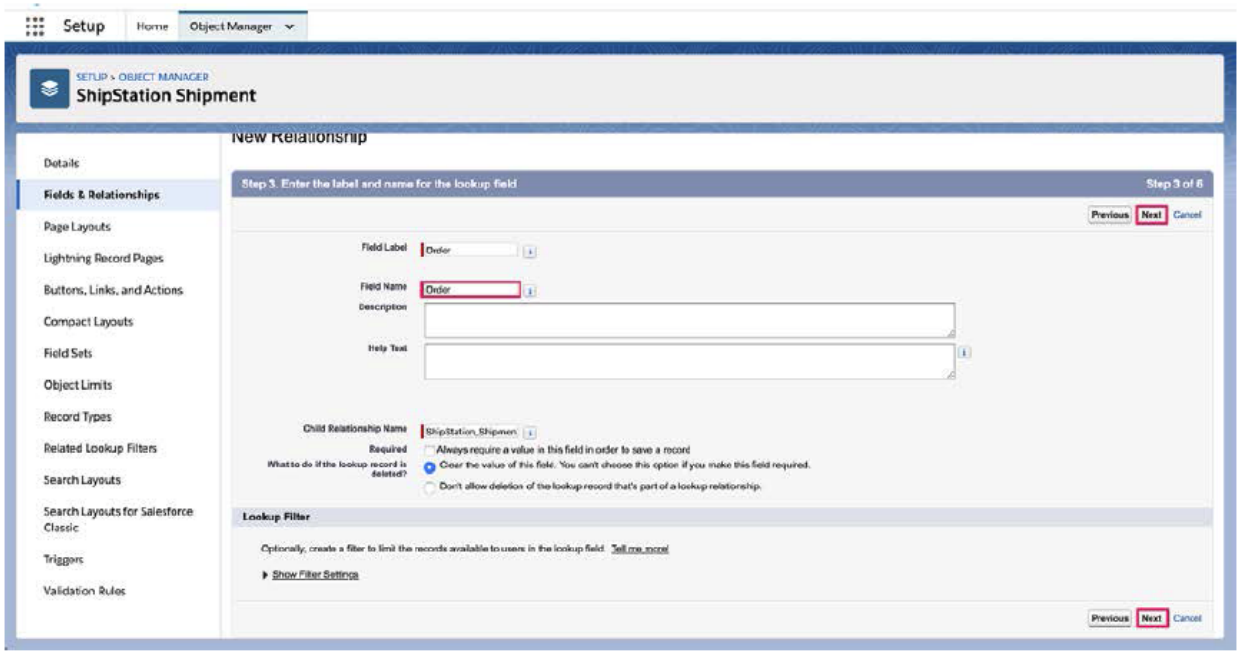
- Select **Lookup Relationship**
- Click **Next**



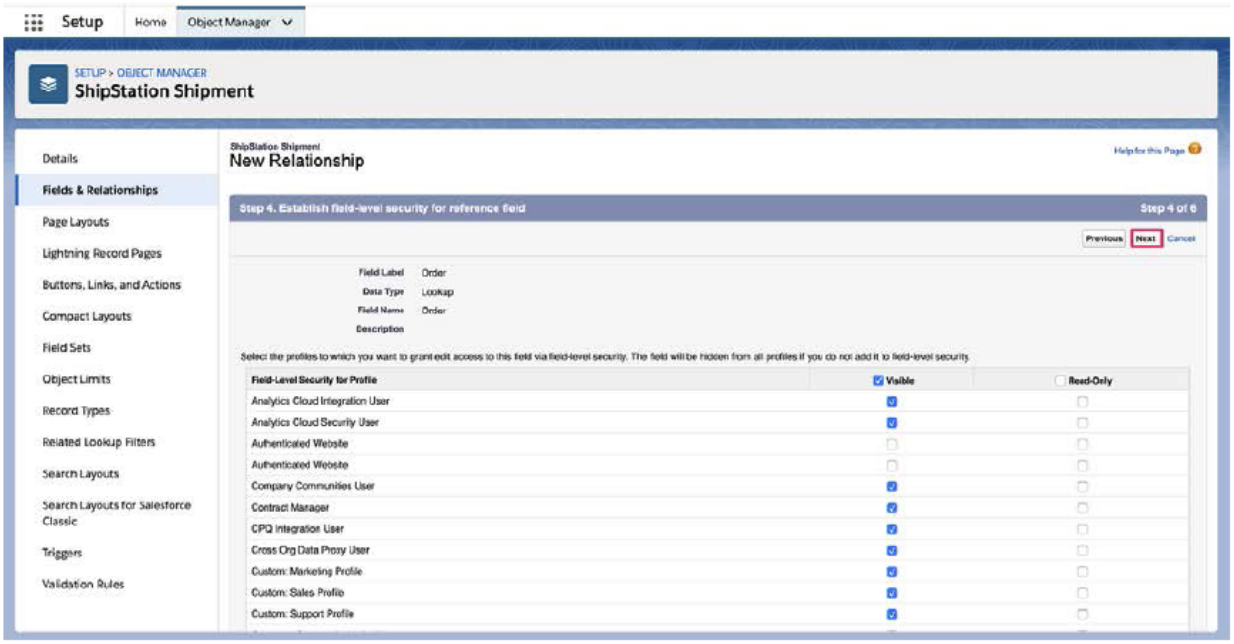
- Select the Order object you are using
- Click **Next**



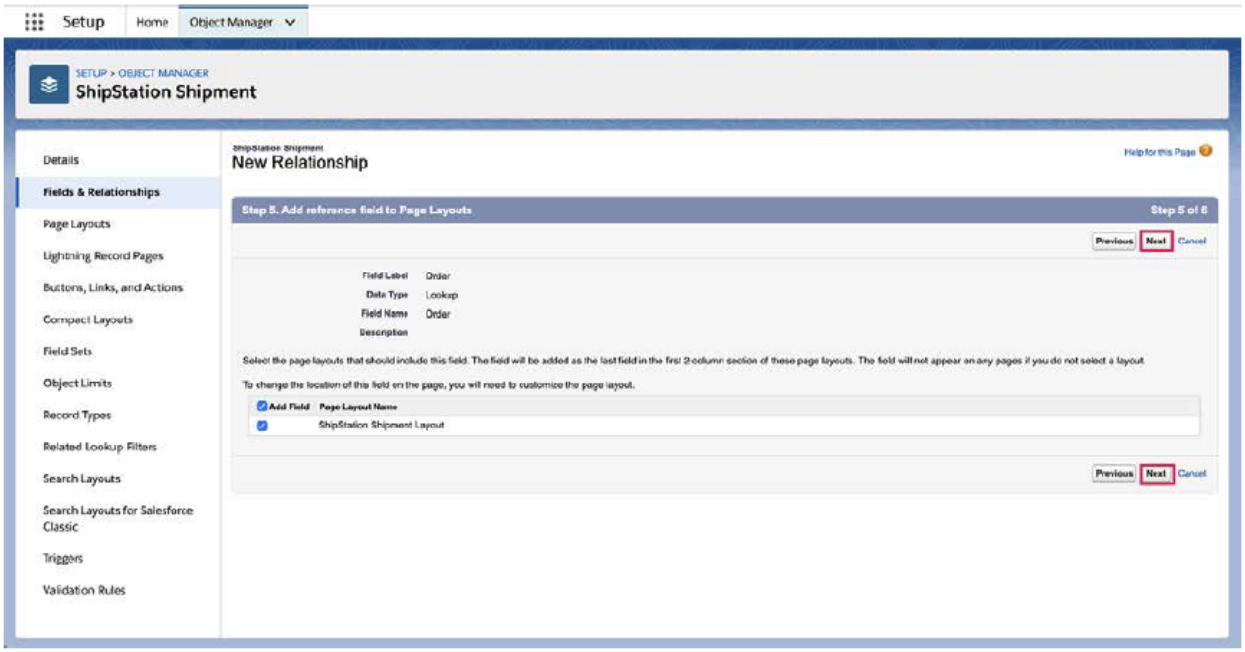
- Enter a Field Name
- Click **Next**



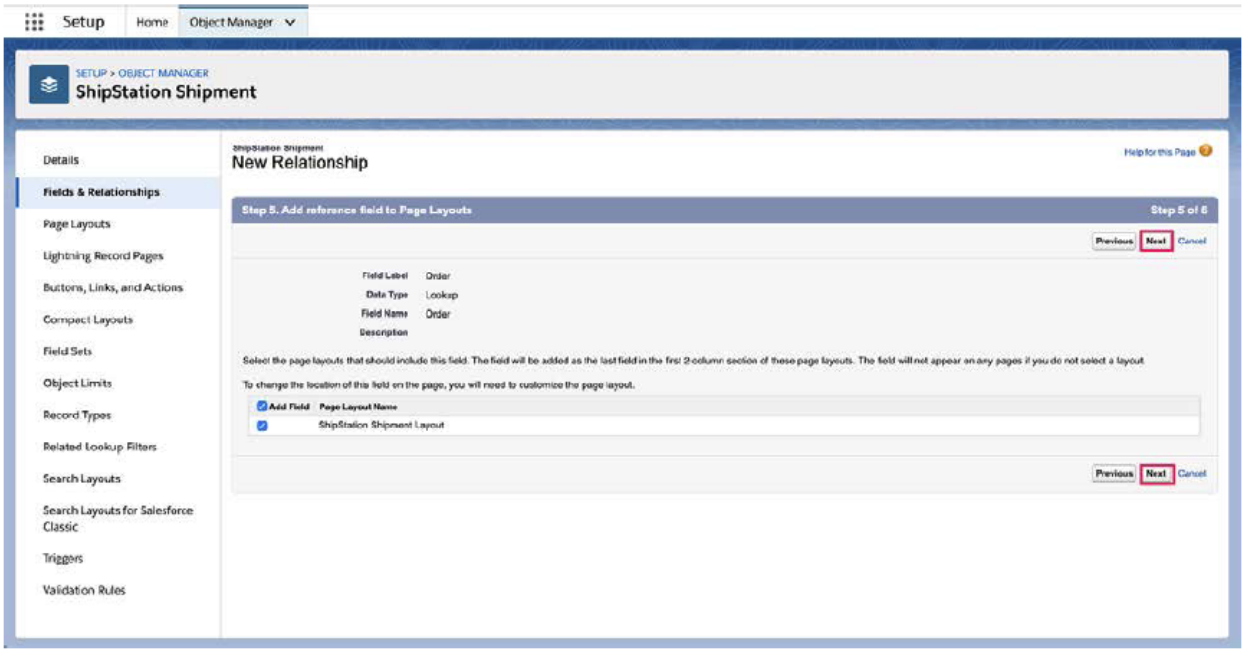
- Establish field-level security for reference field
- Click **Next**



- 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
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous
Next
Cancel
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
ShipStation Shipment Layout

- 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
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous
Next
Cancel
Field Label Order
Data Type Lookup
Field Name Order
Description
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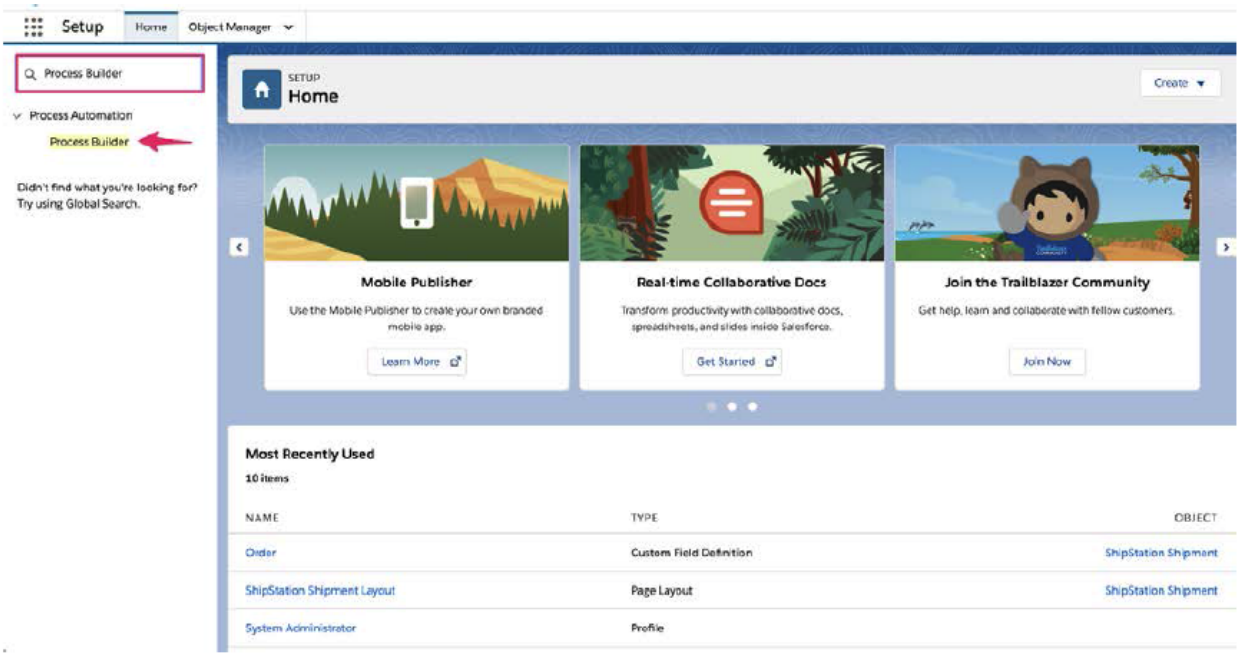
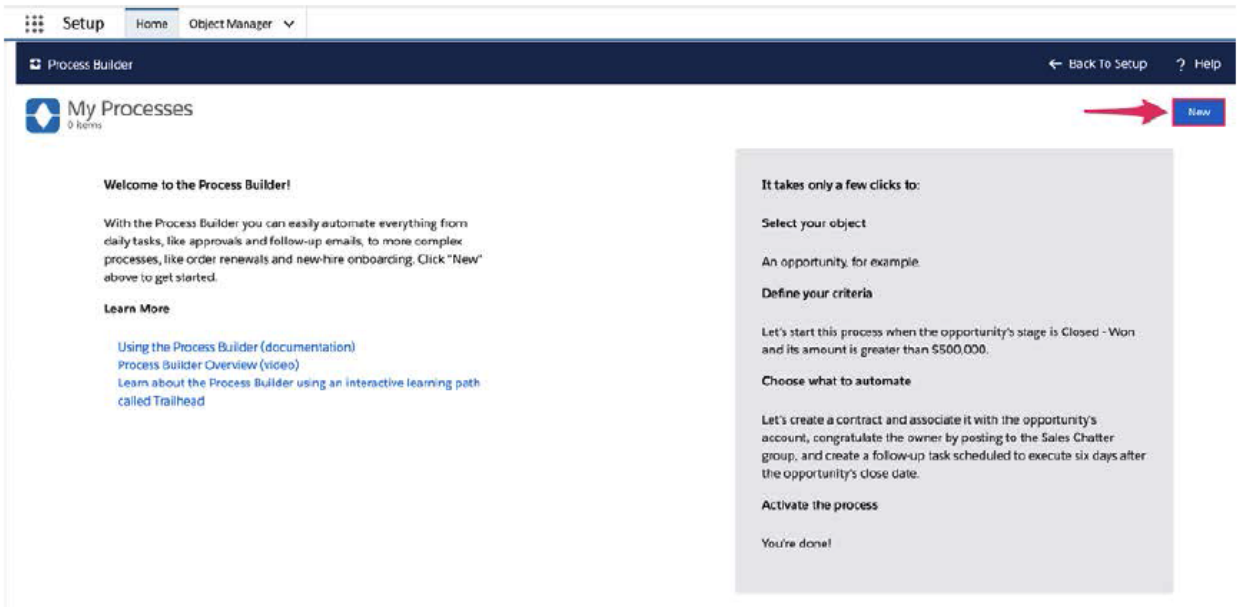
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
ShipStation Shipment Layout

Process Builder

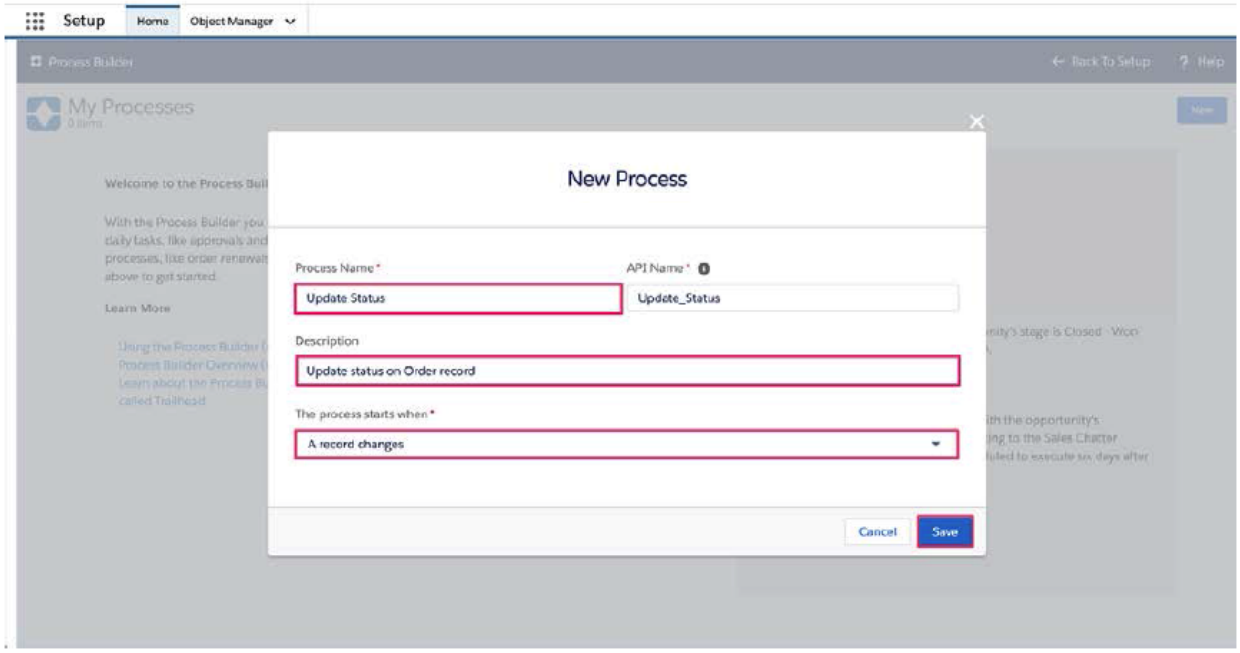
- Navigate back to Setup and search for Process Builder
- Select Process Builder located under the Process Automation category



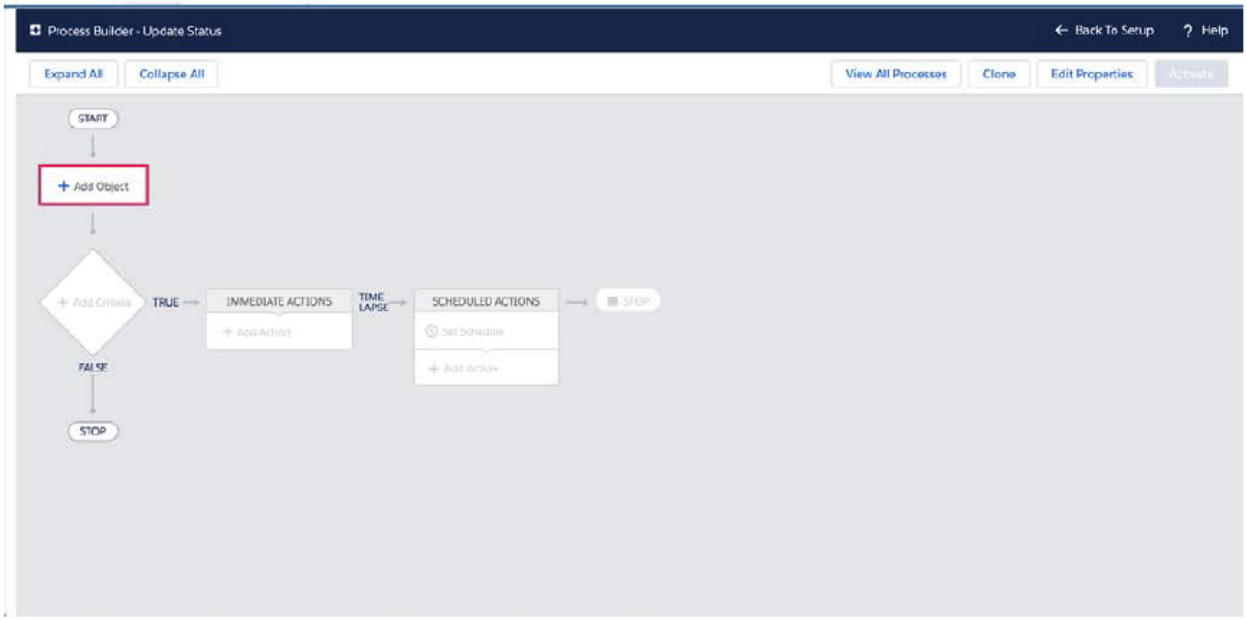
- Click **New**



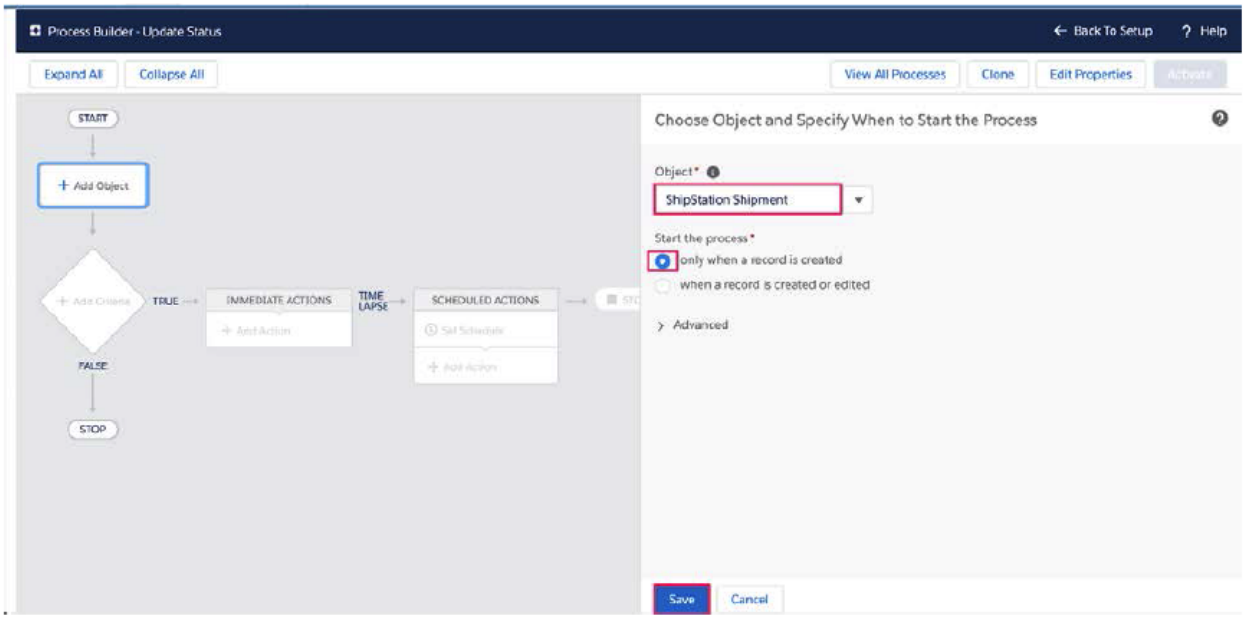
- Create a Process Name
- Optional: Add a Description
- Select “A record changes” for when the process should start



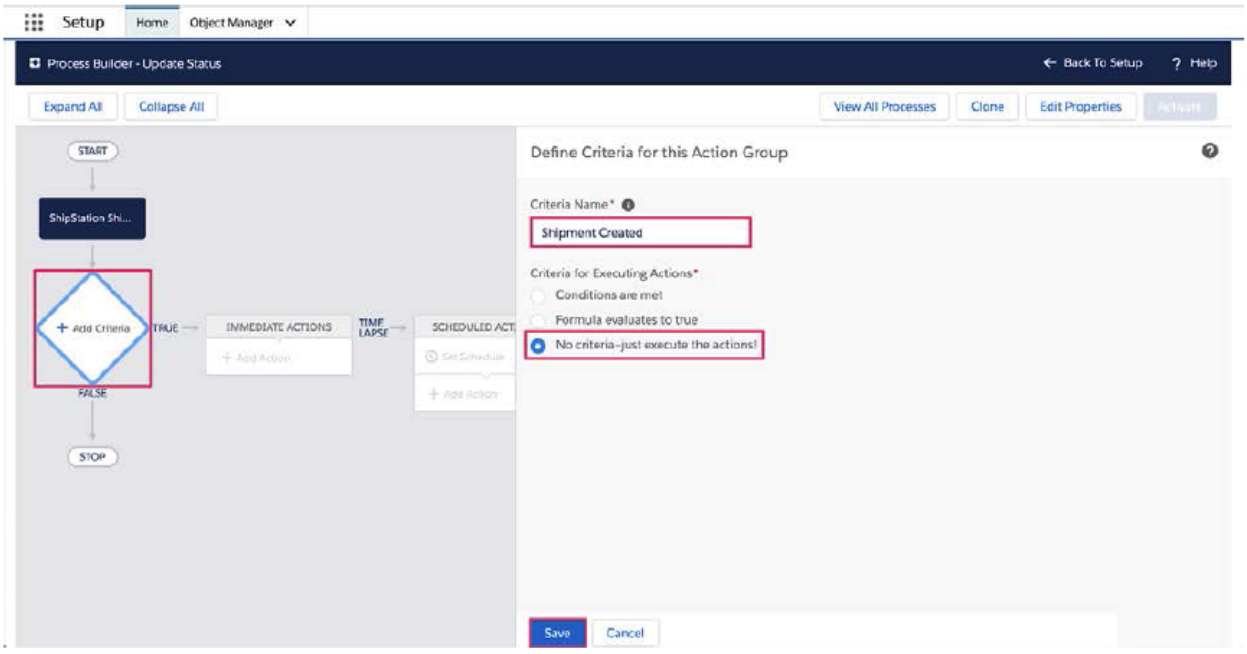
- Click **Add Object**



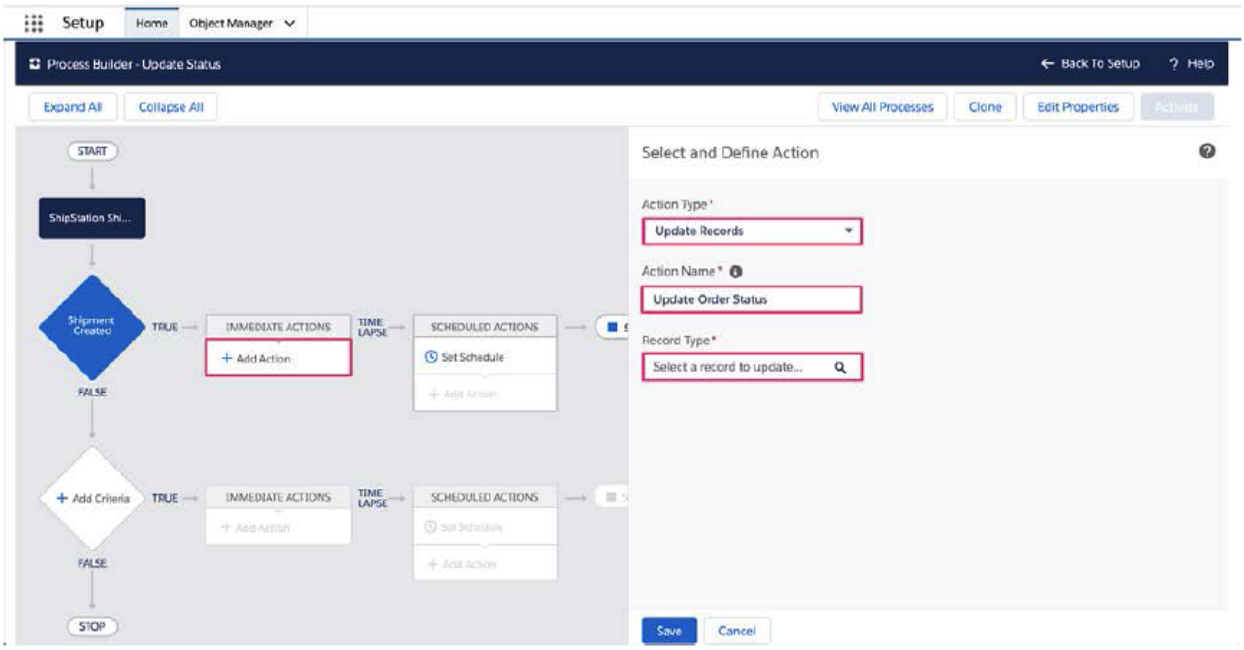
- Choose the ShipStation Shipment object
- Make sure that “only when a record is created” is selected
- Click **Save**



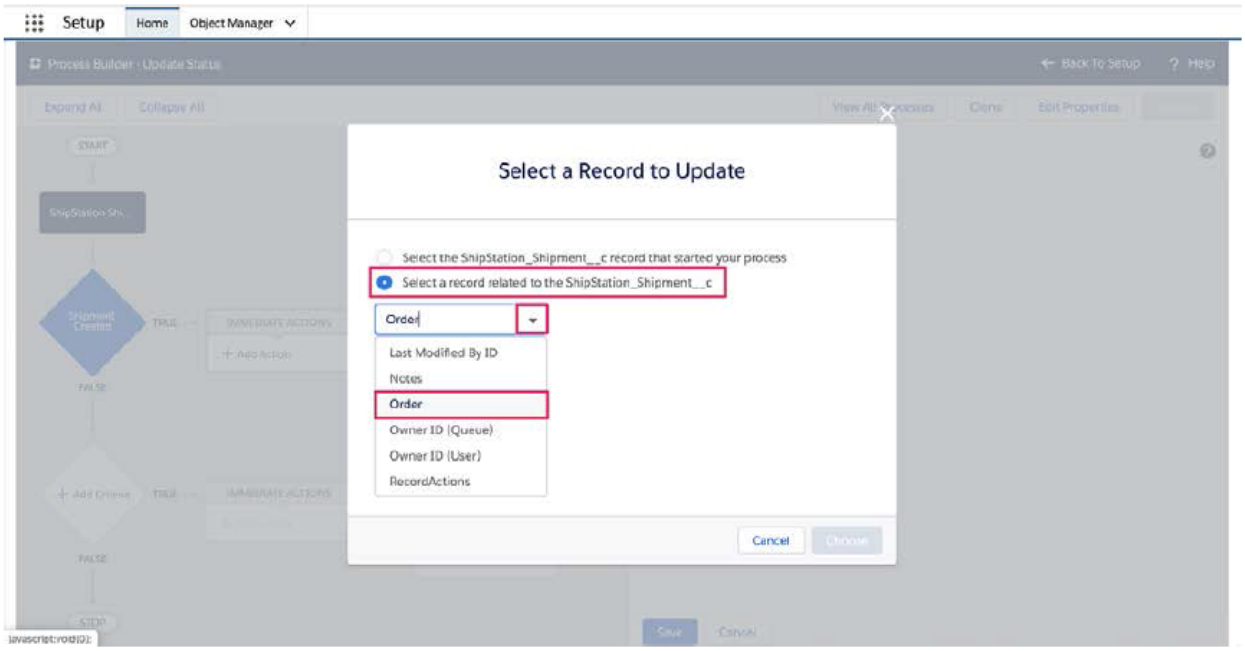
- Click into Add Criteria
- Enter a Criteria Name
- Select “No criteria-just execute the actions!”
- Click **Save**



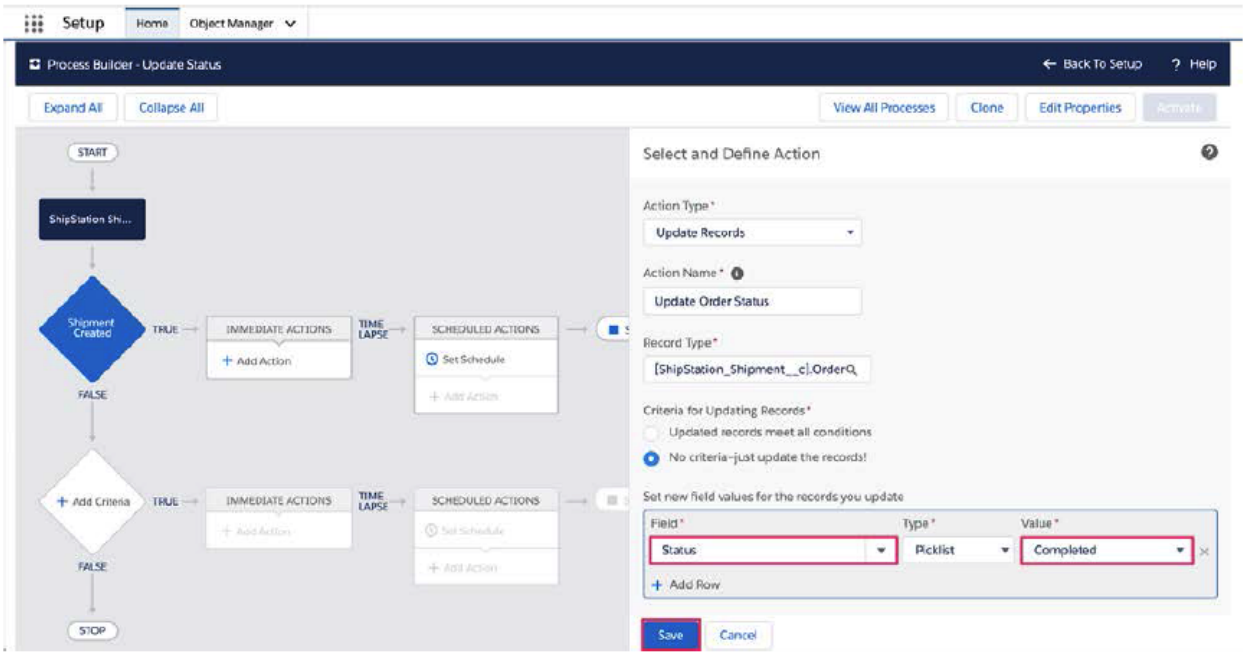
- Click **Add Action**
- Click the Drop down arrow for **Action Type** and select **Update Records**
- Enter an **Action Name**
- Click into **Record Type**



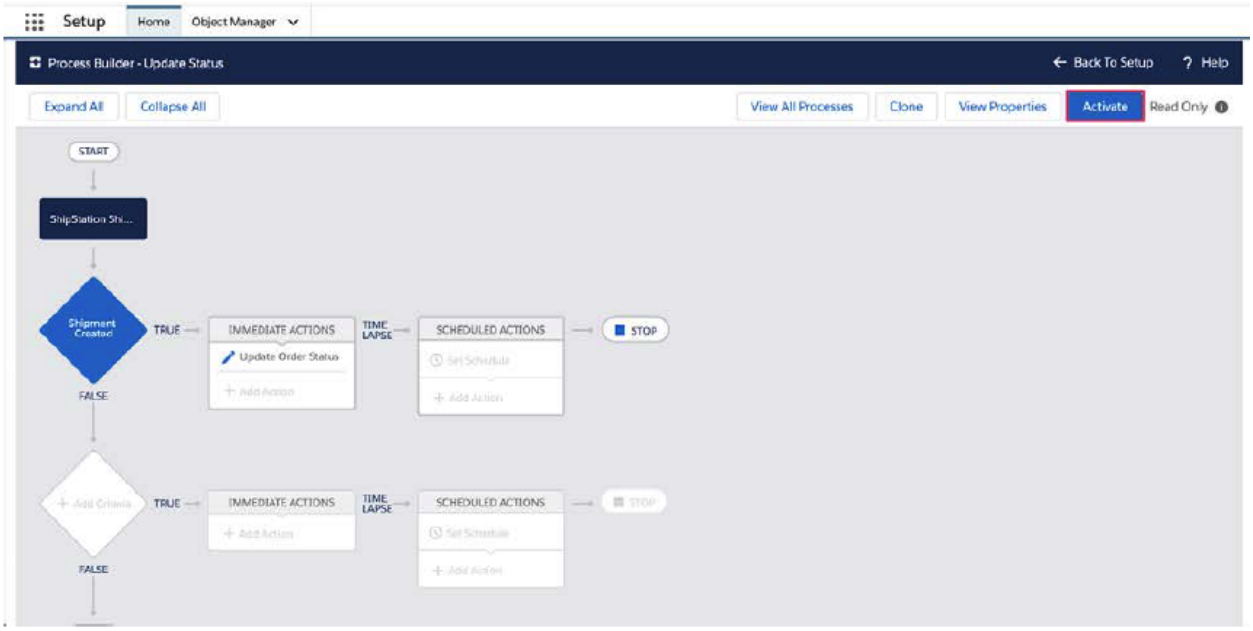
- Select “Select a record related to the ShipStation_Shipment__c”
- Click the drop down arrow
- Select the Order object you created a lookup relationship to (making sure to select the option without the “>”, if there is one)
- Click **Choose**



- 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**



- Click **Activate**



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 unchecke**d 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