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, <u>please click here to refer salesforce documentation on Package</u> <u>Installations</u>.



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



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zw is the list of Web addresses that your organization can invoke from salesforce.com. To View: [All Remote Sites 1] <u>Oceate New Yow</u>	add another Web	add	iress, c	lick	New	Ren	note	Sile	2												
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	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

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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

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idn't find what you're looking for? y using Global Search.	Q Find Settings 18	Clone Manage Assignments		
	Permission Set Overview			
	Description	Enables the standard user to view ShipStation Shipment records.	J.Pi Name	ShipStation_Standard_User_Permission_Set
	License		Namespace Prefix	qasstation
	Session Activation Required		Created By	Matthew Kurnyte, 10/8/2019 9:24 AM
	Last Nodified By	Matthew Kumyta, 10/22/2019 11:30 AM		

 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



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• Click into Fields & Relationships

• Then click into the **Status** field

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- Enter picklist value
- Enter API name
- Click Save

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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

Inbound C	Connection	Outbound Connection
Inbound Connection		Guidance
(îx	Not Connected	Click Authorize and enter your Salesforce credentials in the pop-up window that appears.
		Authorize This will allow ShipStation to access your Salesforce org.
Ext		Next



In your ShipStation account

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

Store Setup		
12 marketplace stores are conner	Connect a Marketplace	×
Store Name	Salesforce	
1.0.00	Connect with a Marketplace by clicking on a tile below	
 Provide the second secon	salesforce	
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Show Inactive Stores		

- 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



Connect a new Marketplace	×
salesforce	
In order to connect ShipStation to your Salesforce Enterprise Edition Org you'll need to provide the connect URL and the API Key va below. Follow these steps to get connected:	lues
 Download the ShipStation App for Salesforce Enterprise here. As a Salesforce admin, install the App package into your Salesforce Org by following the guideline here. Once installed, start the ShipStation setup by going to App Launcher > ShipStation Setup > Setup Assistant. When prompted to setup your Outbound Connection, copy and paste your Connect URL and ShipStation API Key below into t Assistant and click Finish. Once done, continue with the Data Mapping process as described in the guide. This window will close once you've completed setup. 	he Setup the
Connect URL	
https://ss7.shipstation.com/api/oauth/connect/SalesforceCore	
ShipStation API Key	
Cancel Back 0	Close

In Your Salesforce Org

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



¢	¥.	Outbound Connection
Outbound Connection		Guidance
Endpoint URL		Enter your ShipStation endpoint URL and API key and click Authorize.
1 A 37 (J		This will enable Salesforce to access information from your ShipStation account.
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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

Product Field Mapping		7	\rightarrow \rightarrow \rightarrow
roduct Field Mapping			Guidance
bject Product			Data mapping determines how external data will be stored in Salesforce. By default, Salesforce will store ShipStation
SHIPSTATION	SALESFORCE FIELD	REMO	<pre>product data in the Product object with the required field mappings shown here. Additional mappings can be added by clicking Add Mapping.</pre>
Currency Type	Currency Type	•	If you'd like to use another Salesforce object to store this dat
Description	Product Description	•	before moving on to the next step.
Msrp	Msrp	•	Otherwise, click Next to continue with the default mappings.
Name	Product Name	•	
Product Id	Product ID	•	
SKU	Product SKU	•	
Add Mapping			
Evit			



- 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

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bject				By default, Salesforce will store ShipStation order data in the Order
Order			*	object with the required field mappings shown here. Additional mappings can be added by clicking Add Mapping.
rder Status Mapping				If you'd like to use another Salesforce object to store this data, you'll
SHIPSTATION	SALESFORCE			have to complete data mapping for your selected object before moving on to the next step.
Order Status	Status		•	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
Map Picklist Values				orders in Salesforce will be sent to ShipStation for processing.
hipStation-to-Salesforce Field Mapping				Otherwise, click Next to continue with the default mappings.
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Bill to Contact Id	Bill To Contact ID	•	亩	
Sales Order Id	Order Number	•	亩	
Ship to Contact Id	Ship To Contact ID	•	亩	
Shipping Street	Shipping Street	•	Ċ	
Shipping City	Shipping City	-	亩	
Shipping State	Shipping State/Province	-	â	
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Add Mapping				
Back Exit			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

CustomField1	•	CustomField1	â
CustomField2	•	CustomField2	ŵ
CustomField3	•	CustomField3 •	亩



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	Awaiting Payment 💌	~
Awaiting Shipment	Awaiting Shipment	~
Cancelled	Select an Option 💌	
Completed	Select an Option 💌	
On Hold	Select an Option 💌	
Pending Fulfillment	Select an Option	
Shipped	Select an Option	

Cancel



- 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.)

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Order			Order ID		•
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Add Mapping					
Back Exit					Next
					Next

• 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

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Tracking Number	Track	ing Number	•	ŵ		
Add Mapping						
Deals Fulls				Finish		
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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







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Product	Product2			
Quick Text	QuickText			
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• Click Page Layouts then click Order Layout

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Click and drag the field onto the page



• Click Save

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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

10				
	App Launcher	Search apps or	items	Vist AppExchange
arte	Accounts	App Lauricher	Approval Requests	Assists
SED	Calendar	Campaigns	Cases	Chatter
L	Consumption Schedules	Contact Requests	Contacts	Contracts
L	Dashboards	Duplicate Record Sets	Email Templates	Enhanced Letterheads
Ŀ	Files	Forecasts	Groups	Home
L	Images	Job Profiles	Loads	Lightning Bolt Solutions
Ŀ	List Emails	Locations	Macros	Maintenance Plans
Ŀ	Operating Hours	Opportunities	OrderProducts	Orders
Ŀ	Org Metrics	People	Price Books	Product Items
L	Product Request Line Items	Product Requests	Product Transfers	Products
	Recommendations	Recycle Bin	Reports	Return Orders
lay	Scorecards	Service Appointments	Service Crew Members	Service Crews
L	Service Resources	Service Territories	Setup	Shifts
	ShipStation Shipments	Shipments	Streaming Channels	Tasks
	Time Sheets	User Provisioning Requests	Work Capacity Limits	Work Orders
	Work Type Groups	Work Types		

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



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Ð	ShipStation Shipments Recently Viewed		New	Import Change Owner
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2	 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

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• 1) Click into Fields & Relationships

• 2) Click New

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- Select Lookup Relationship
- Click Next



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ield Sets	Auto Number	A system-generated sequence number that uses a display formatiou define. The number is automatically incremented for each new recard.
what I leader	Fermula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
ojectumos	Roll-Up Burnnery LE	A reak-only field that displays the sum, ministrum, or maximum value of a reast in a related list or the record count of air records leade in a related list.
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elated Lookup Filters	Master-Octail Relationship	Creates a special type of parent-shid rolutionship between this object (the ohid, or "total") and another object (the parent, or "master") where
earch Layouts		 The relationship field is sequined on all detail records. The extremitip and altaining of a detail record are determined by the master record.
earch Lavouts for Salesforce		 When a user devices the masternecost, all detail records are deviced. You san onside voltup summary fields on the masternecost to summarize the detail records.
lassic		The relationship field allows users to click on a lowkup icon to select a value from a popup list. The master object is the source of the values in the list.
ingens	External Lookup Relationship	Creates a relationship that links this object to an external abject whose data is sloved outside the Salesforce org.
	Ctheckbox	Allows users to select a True (shecked) or False (andhocked) value.
alidation Rules	Courses	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excer or and
		epresdaheet.

• Select the Order object you are using

• Click Next

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- Enter a Field Name
- Click Next



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• Establish field-level security for reference field

• Click Next

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- Add Reference field to Page Layouts
- Click Next



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• Click Save

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autors, Links, and Actions	Field Label Didar Data Type Lookop Field Name Order
ield Sets	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 an any pages if you do not select a layout
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elated Lookup Filters	
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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

Setup Home Object Manager	•	← Back To Setup	? Heip
My Processes	,	<u>×</u>	-
Welcome to the Process Buil	New Process		
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		fuled to execute six days after	
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• Click Add Object

C Process Builder - Update Status		← Back To Setup 🤌 Help
Expand All Collapse All		View All Processes Clone Edit Properties Automatic
STOP	TIME SCHEDULED ACTIONS Ser Structure 4 Add Schore	



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

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coand All Collapse All	View All Processes Clone Edit Properties Actuals
FAIT + Add Object + Add Collect TRUE	Choose Object and Specify When to Start the Process Object* ShipStation Shipment Start the process* only when a record is created when a record is created or edited Advanced

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



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STOP							

- 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 - Opcate Sta	tus								 Back To Setup 	• ? н
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- 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

	Handli Xector Con	
(SMP)	Select a Record to Update	4
	Select the ShipStation_Shipmentc record that started your process Select a record related to the ShipStation_Shipmentc	
PARTICLE PARTICIPATIONS	Order	
.+ Add Action	Last Modified By ID	
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	Cancel Chasse	

- 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



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• Click Activate

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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. <u>*Currency Type is a required field for*</u> *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

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



Common Errors cont

{"Method":"ExportSalesOrders","Body":"{\"message\":\"156: Unknown field \\\"Synced__c\\\" on object\\\"Opportunity\\\"\",\"external_warnings\":null,\"external_errors \":null,\"transaction_id\":\"00000000-0000-0000-0000-000000000\",\"metadata\":n ull}","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

