



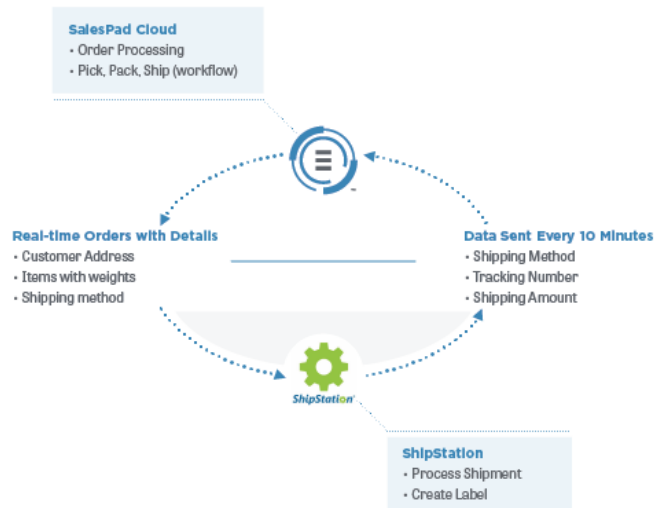
## ShipStation Integration

Megan De Freitas - 2024-12-03 - Integrations

### Overview

SalesPad Cloud integrates with ShipStation to handle shipping packages with a number of common carriers. Once the integration is set up, users can configure the system to allow shipping on orders or invoices. The user can then select the option to ship the document, which sends the shipping address, line item information, and Shipping Method to ShipStation. After completing the shipment in ShipStation, SalesPad Cloud will forward the document in the Workflow, receive the shipping amount, and show tracking numbers from ShipStation. From that point forward, the tracking information can be printed on printed forms.

For a quick visual representation of what happens when you integrate ShipStation with SalesPad Cloud, check out this diagram:



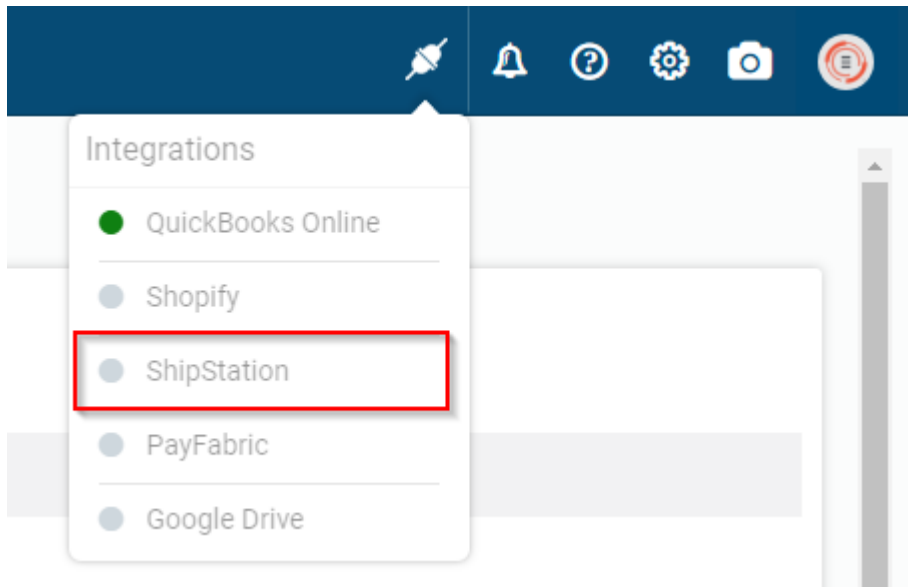
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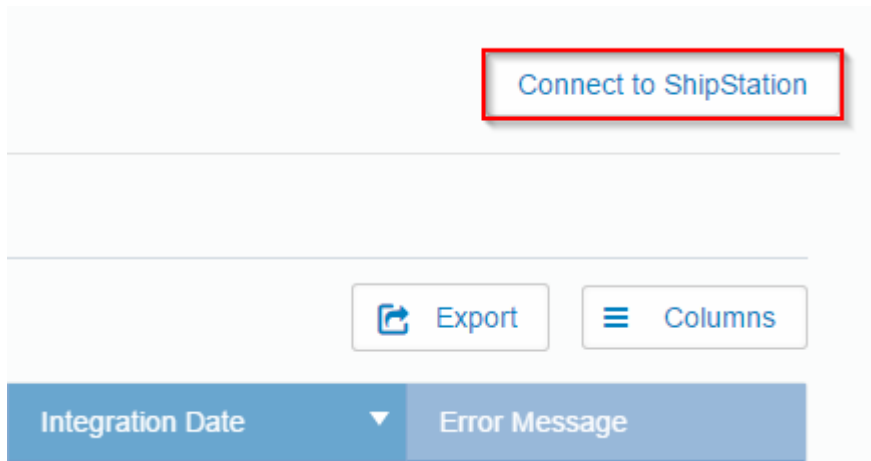
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#### Connect to ShipStation

To connect your SalesPad Cloud account to your [ShipStation](#) account, select **ShipStation** from the Integrations dropdown in the upper right-hand corner of the screen.



Click the **Connect to ShipStation** button that appears.



Enter your ShipStation API Key and API Secret into the window that pops up and click **Connect to ShipStation**.

## ShipStation Integration

To connect Test Comp, please enter the API Key and API Secret from your ShipStation account into the fields below.

### ShipStation API Key

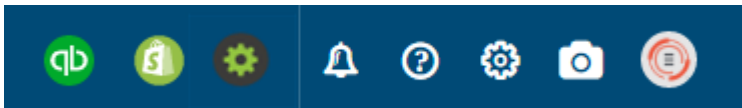
### ShipStation API Secret

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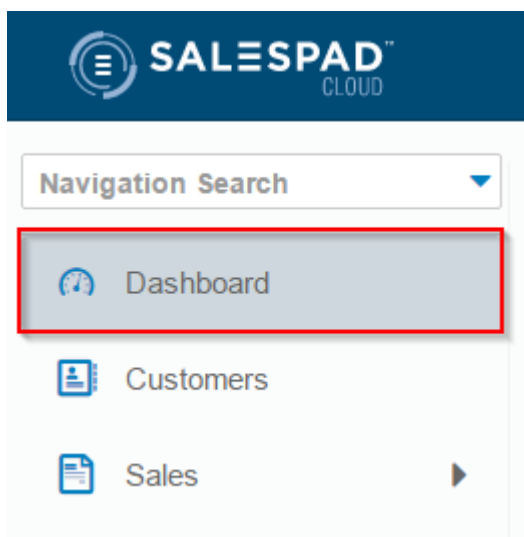
For help finding your ShipStation API Key and Secret, visit the [ShipStation help page](#).

Your SalesPad Cloud account is now connected to your ShipStation account, and the integration will run in the background as you continue to use SalesPad Cloud. Any [Shipping Methods](#) that you had saved in your ShipStation account will be added to your list of SalesPad Cloud Shipping Methods.

Notice that the ShipStation icon in the upper right-hand corner of the screen is no longer grayed out. Click this icon to quickly view a log of integration activity.



To see the status of all of your integrations, click **Dashboard** on the left-hand side of the screen.



You will see a list of your integrations. If all is well, the box to the far right will be green. If

there is an issue with the integration, the box will be gray. Click the **gear** icon in the green (or gray) box to navigate to the [System Settings](#) module.



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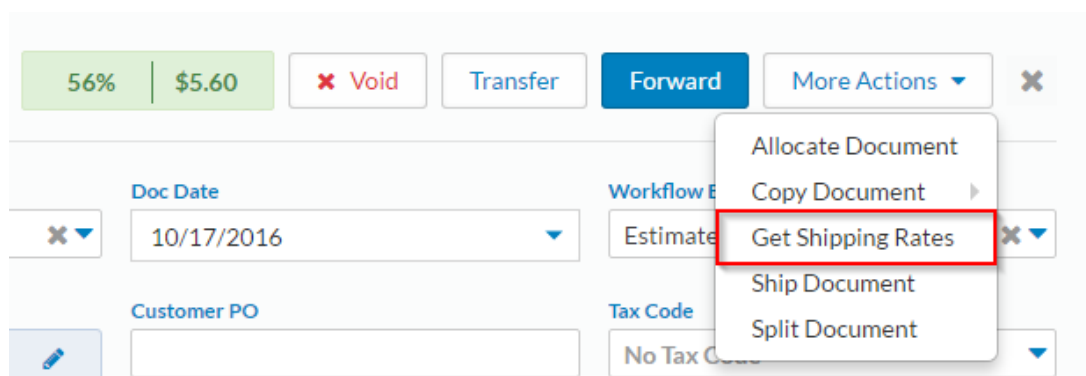
### Get Shipping Rates

Before shipping a sales document, you can use ShipStation to get shipping rates, which will help you select the best shipping service.

Before you're able to retrieve shipping rates, however, the following data must be configured:

- The desired Shipping Method must be selected on the sales document.
- The Location Contact Address must be a valid deliverable address for the Locations of each item on the sales document.
- The Customer Shipping Address must be a valid deliverable address.
- Each address must have a country specified using the two-character ISO country code (e.g. US instead of USA).
- The Weight and Weight Unit must be set for each item on the sales document. This is done by editing the inventory item.

Click the **More Actions** dropdown on a sales document and select **Get Shipping Rates**.



Shipping rates applicable to the carrier associated with the selected Shipping Method will be displayed.

Shipping Rates		
Service	Cost	Fee
USPS First Class Mail - Letter	\$0.89	\$0.00
USPS First Class Mail - Large Envelope or Flat	\$1.36	\$0.00
USPS First Class Mail - Package	\$2.60	\$0.00
USPS Priority Mail - Package	\$5.60	\$0.00
USPS Priority Mail - Medium Flat Rate Box	\$11.60	\$0.00
USPS Priority Mail - Small Flat Rate Box	\$5.90	\$0.00
USPS Priority Mail - Large Flat Rate Box	\$15.85	\$0.00
USPS Priority Mail - Flat Rate Envelope	\$5.60	\$0.00
USPS Priority Mail - Flat Rate Padded	\$5.90	\$0.00

**OK**

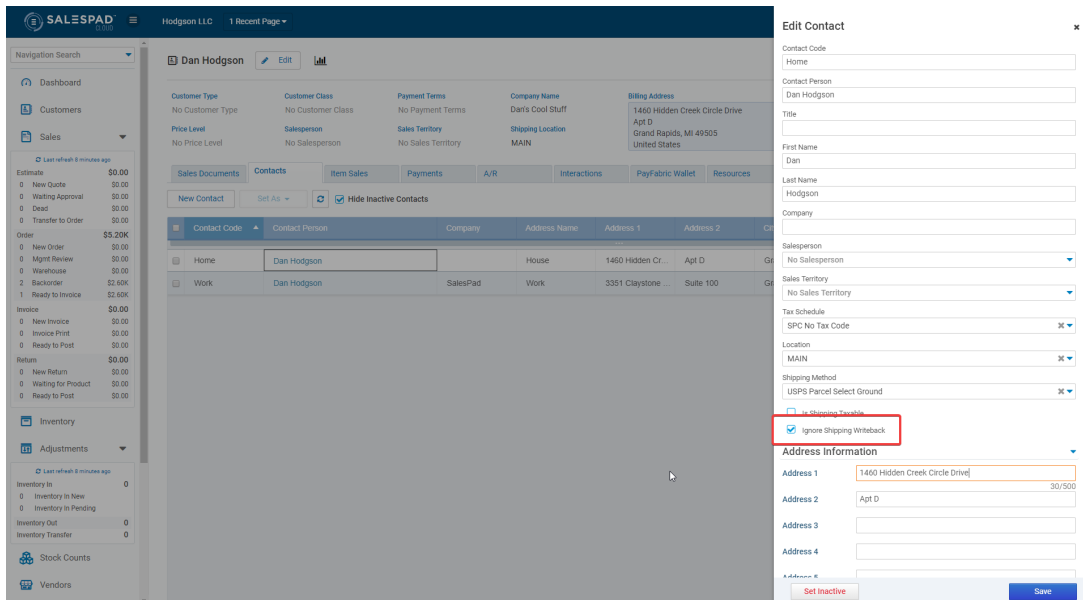
These shipping rates are for informational purposes only. They are retrieved from ShipStation, and they are estimates based on the assumption that all items from the same Location will be shipped in one shipment. They may vary from actual shipping rates.

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#### **Ignore Shipping Writeback**

When a customer places an order through an ecommerce store that uses shopping carts, such as Shopify, eBay, or Amazon, shipping costs are typically included in the order total. Because of this, it's not necessary to include shipping writeback costs on the order once that order has been pulled into SalesPad Cloud.

To ensure that shipping writeback costs aren't added to these orders, check the Ignore Shipping Writeback checkbox on the Contact card for that [customer](#).



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## ShipStation Integration Map

### Shipping Method

All carrier services from ShipStation will be integrated to SalesPad Cloud as Shipping Methods. Shipping Methods that already exist in SalesPad Cloud with the same carrier service name or same carrier code will not be integrated from ShipStation.

#### SalesPad Cloud

Shipping Method

Shipping Carrier

#### ShipStation

Service

Carrier Code

### Sales Document

When a sales document is shipped, the following data is integrated between ShipStation and SalesPad Cloud.

#### SalesPad Cloud

Document Number

Document ID

Document Date

Billing Address

Shipping Address

Tax Amount

#### ShipStation

Order Number

Order Key

Order Date

Billing Address

Shipping Address

Tax

Carrier Code	Shipping Carrier
Service Code	Shipping Method Code
Tracking Number*	Tracking Number
Item Weight	Weight
Weight_Uofm	Units

\*Tracking numbers are only integrated from ShipStation to SalesPad Cloud when the shipment has been shipped.

### **Sales Line Item**

The following data is integrated to ShipStation for each sales line item on a sales document.

<b>SalesPad Cloud</b>	<b>ShipStation</b>
Sales Line ID	Line Item Key
Item Number	Name
Sku	Sku
Unit Price	Unit Price
Location	Warehouse Location
Weight	Weight Value
Weight UofM	Weight Units
Quantity	Quantity

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### **See it in Action**

After you've set up your ShipStation integration, select Ship Document from the **More Actions** dropdown on a sales transaction.

The screenshot shows a document management interface. At the top, there is a green box with '\$-100.00', a 'Void' button, a 'Transfer' button, and a 'More Actions' dropdown menu. The 'More Actions' menu is open, showing options: 'Allocate Document', 'Copy Document', 'Get Shipping Rates', 'New Payment', 'Ship Document' (highlighted with a red box), and 'Split Document'. Below the menu, there are fields for 'Doc Date' (10/13/2016), 'Customer PO' (PN580), 'Reference No', 'Workflow E', 'Sales D', 'Tax Code' (No Tax), and 'Salesperson'.

**Note:** If you do not see Ship Document as an option, check that Can Ship is checked for the [Sales Document Type](#).

The screenshot shows the 'Sales Document Type' configuration page. On the left, there is a 'New Sales Document Type' section with a list of document types: Estimate, Order (selected), Invoice, Sales Receipt, Return, and Refund. The main configuration area includes fields for 'Sales Doc Type' (Order), 'Fulfillment Method' (Auto), 'Lot Fulfillment Method' (Auto), 'Serial Fulfillment Method' (Auto), 'Sale Type' (Order), 'Workflow' (Sales), 'Can Transfer To' (Invoice), and 'Standard PO Type' (Standard). On the right, there is a 'Payments Allowed' section with several checkboxes: 'Can Ship' (checked and highlighted with a red box), 'Can Post', 'Shown', 'Can Dropship', 'Can Purchase', 'Auto Batch Forward', 'Inactive', and 'Can Partially Invoice'.

Confirm that you want to ship the document.

The screenshot shows a confirmation dialog box titled 'Ship Sales Document'. The text inside the dialog asks 'Ship Sales Document ORD0000000001?'. There are two buttons: a 'Cancel' button and a 'Ship' button (highlighted with a red box).

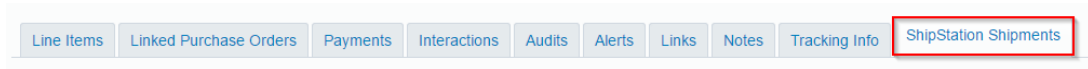
SalesPad Cloud will send the sales document to ShipStation. ShipStation calculates the order total based on the unit price and quantity of the items. This order total is used for shipping insurance purposes only. The document total in ShipStation is not intended to match SalesPad Cloud.

Your SalesPad Cloud document will be marked as Read Only and Awaiting Shipment until the ShipStation document has shipped. Once that happens, your SalesPad Cloud document will be marked as Shipped, it will no longer be Read Only, freight amount and tracking information will be added, and the document will move to the next workflow batch. If the ShipStation document is voided before being shipped, the SalesPad Cloud document will no longer be marked as Read Only or Awaiting Shipment, but it will **not** be voided.

Check the status of your shipment in SalesPad Cloud by opening the ShipStation Shipments



tab on your sales document.



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