



## **Ship Station Order Management for Zoho CRM**

### **Zoho CRM Extension**



### **User Manual**

**Version 1.0**

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# Ship Station Order Management - Zoho CRM Extension: User Manual

## 1. Overview

Ship Station is web-based, multi-carrier shipping solution for e-commerce retailers. Designed to streamline the fulfillment process, this software offers a vast number of integrations that allow you to import automatically and process orders from the most popular sales channels and shopping carts. Zoho CRM Extension for Ship Station order Management is developed by Tiara, a Zoho Authorized Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily sync the data from Ship Station to Zoho CRM unidirectional. Ship Station Customer will be added as Contacts, Products as Products, Order as Sales Order into the Zoho CRM account.

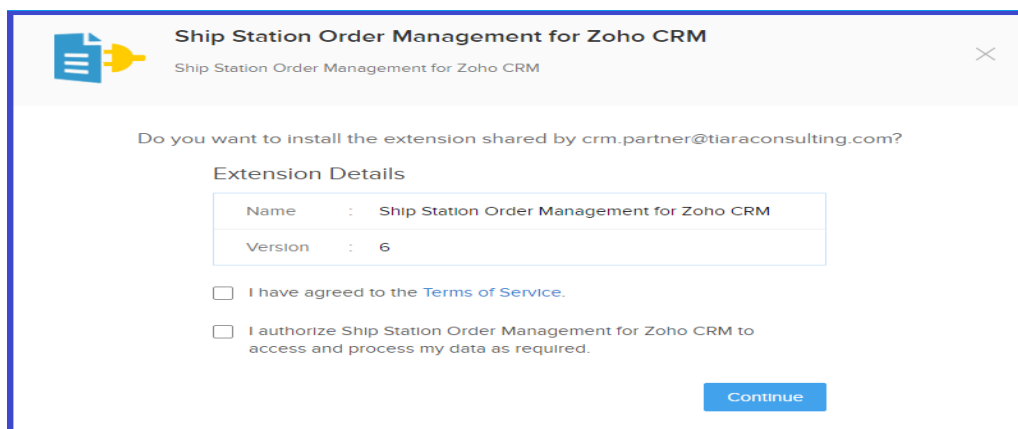
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the integration functionality within your Zoho CRM account.

### 1.1. Install the Ship Station Extension

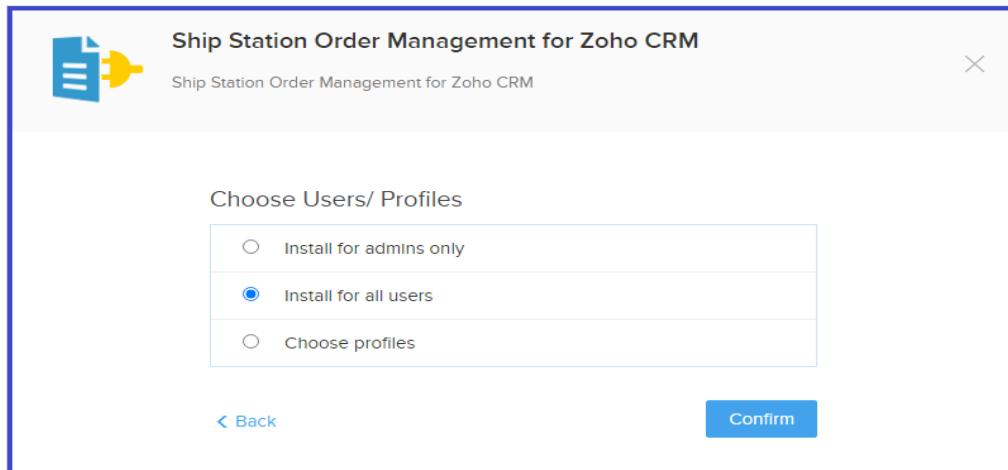
Go to Zoho Marketplace and search for “**Ship Station Order Management for Zoho CRM**” to locate the extension and install it directly from the Marketplace. Alternatively, you can install the Ship Station Order Management by logging in to your Zoho CRM account and follow the below installation instructions.

#### To install the Ship Station Extension from Zoho CRM:

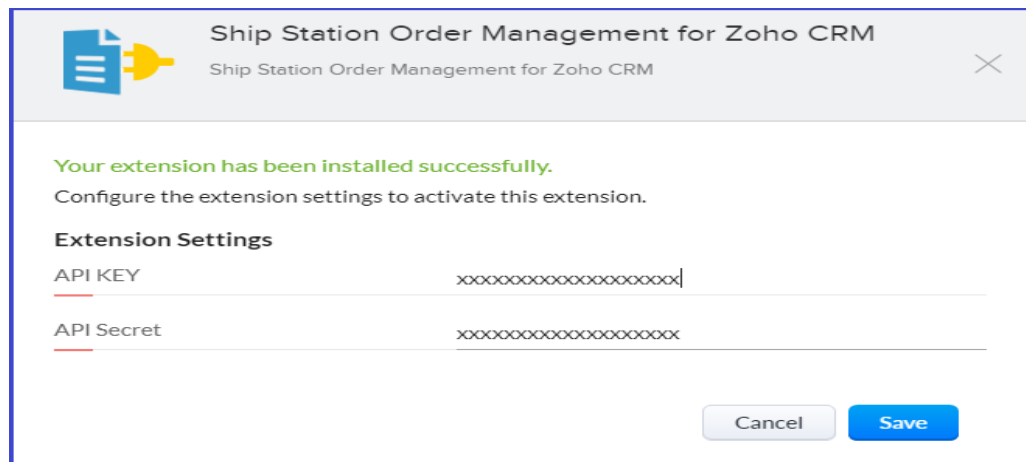
- ❖ Go to **Setup > Marketplace > All**. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed. Go to “**All Extensions**” tab to view all available Extensions.
- ❖ Click **All Extensions**, browse/search for **Ship Station Order Management for Zoho CRM**, locate and then click the Extension. The details about the Extension will be shown as per the screenshot below.
- ❖ Click **Install** button.
- ❖ Make sure you check the “Agree to the **Terms of Service**” checkbox and click **Install**.
- ❖ Read the Privacy Declaration and click **Agree and Continue**



- ❖ Select the users/profiles for which the extension needs to be installed and click “Confirm”.



- ❖ Enter the ShipStation Credentials (API Key and API Secret are mandatory) to start working with this extension. The way to find you the ShipStation credentials as follows in next topic.



## 1.2. Finding Your Ship Station Credentials

To activate Ship Station Order Management for Zoho CRM. The below mentioned credentials are mandatory. This section explains each of the credential information that has to be entered while installing the extension as shown in the screen shot below.

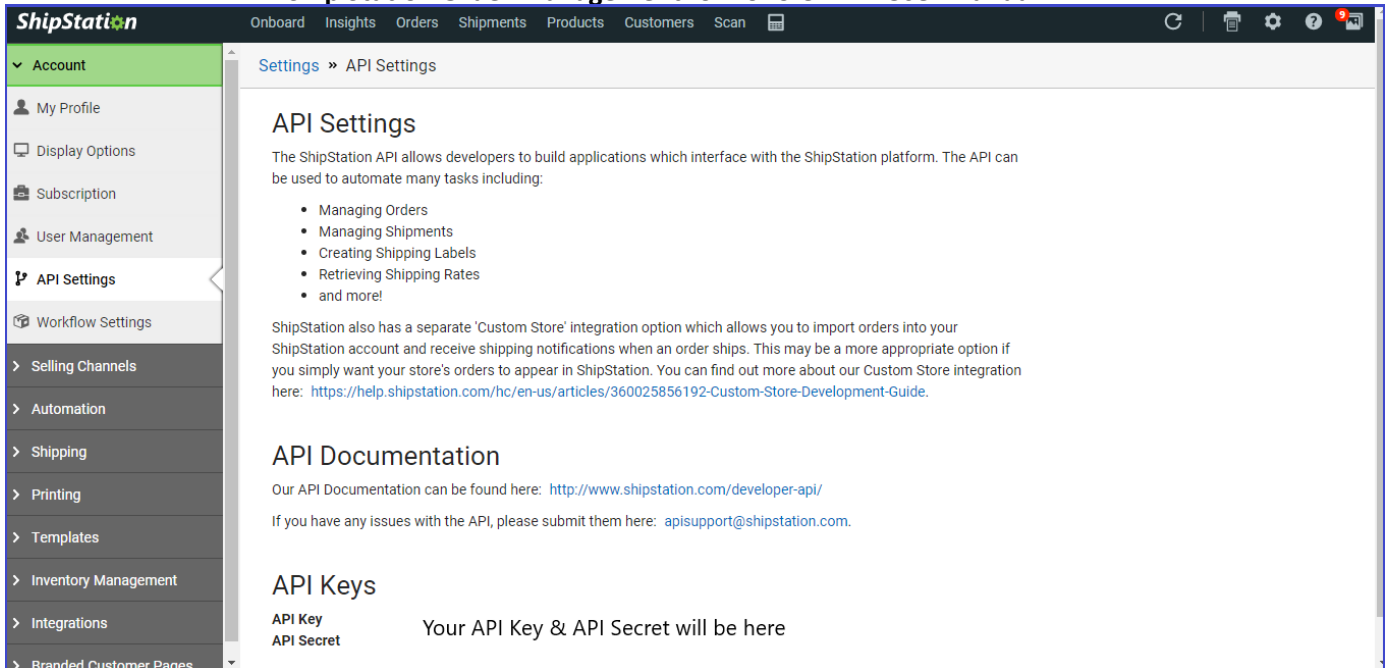
Login to the Ship Station account.

- ❖ **API Key:**

Go to Settings ->Account->API Settings. Under API Keys the API key available.

- ❖ **API Secret:**

Go to Settings ->Account->API Settings. Under API Keys the API Secret available.



### 1.3. Uninstall the Ship Station Order Management Extension for Zoho CRM

Uninstalling this extension from the Zoho CRM will delete all its associated data. To uninstall Ship Station Order Management Extension, please follow the below steps:

- ❖ Go to **Setup > Marketplace > All > Installed tab**.  
All the installed Extensions will be listed.
- ❖ Browse for **Ship Station order Management** and click on the **Uninstall** link.
- ❖ Click **Okay** to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.

## 2. Synchronization

After installing the extension in Zoho CRM, the previous 30 days Ship Station account's orders will be synced to the Zoho CRM account. The data are synced Unidirectionally (Ship Station → Zoho CRM).

A Schedule will be run every day at 11.30 PM (Zoho Time). It will sync previous 30 days ShipStation Account Orders into zoho CRM Sales Order along with Order's Contacts and Products will be created. This Order Migration Schedule will create Maximum of **10000 Sales Order Per day**.

If your previous Orders count exceeded more than 10000 then those records will be created as 10000 Sales Orders per day and the remaining will be created in next day as like this.

After initial data synchronization, any data changes in Customer, Product and Order record on Ship Station will be updated or created in Zoho CRM instantaneously (Real-time sync).

## 2.1. Sync Customer from Ship Station to Zoho CRM Contacts

After the successful installation of the Ship Station Extension, the following custom fields are created in contacts module of Zoho CRM.

- ❖ **Ship Station Customer ID** : Text Field
- ❖ **Integrated From Ship Station** : Checkbox

The screenshot shows the 'Create Contact' form in Zoho CRM. The form includes fields for First Name, Last Name, Account Name, Title, Email, Department, Phone, Home Phone, Other Phone, Fax, Mobile, Date of Birth, Assistant, Asst Phone, Reporting To, Email Opt Out, Skype ID, Secondary Email, and Twitter. Two custom fields are highlighted with red boxes: 'Ship Station Customer ID' (a text field) and 'Integrated From Ship Station' (a checkbox).

The Customer data from the Ship Station Orders will be created as Contacts in the Zoho CRM Contacts module.

CONTACT NAME	ACCOUNT NAME	EMAIL	PHONE	CONTACT OWNER
Raghul	Aptiara	demo@gmail.com	888-222-33-90	Tiara Consulting
Lokesh	Aptiara	rajraj271998@gmail.com	555-555-5555	Tiara Consulting
Gary L. Young	White	gary@gmail.com	865-394-2077	Tiara Consulting

Total Count: 3

10 Records Per Page < 1 to 3 >

## 2.2. Sync Products from Ship Station to Zoho CRM products

After the successful installation of the Ship Station Extension, the following custom field is created in the Products module of the Zoho CRM.

- ❖ **Ship Station Product ID** : Text Field
- ❖ **Ship Station WareHouse Location** : Text Field
- ❖ **Integrated From Ship Station** : Checkbox

The screenshot shows the 'Create Product' form in Zoho CRM. The form is titled 'Create Product' and has a sub-header 'Product Information'. It contains several input fields and a checkbox. The fields are arranged in two columns. The 'Ship Station WareHouse Location' and 'Ship Station Product ID' fields are highlighted with red boxes. The 'Integrated From Ship Station' checkbox is also highlighted with a red box.

The Products data from the ShipStation Orders will be created as Products in the Zoho CRM Products module.

PRODUCT NAME	PRODUCT CODE	PRODUCT ACTIVE	PRODUCT OWNER
Book	Book#1	✓	Tiara Consulting
Biscuit	Bis#1	✓	Tiara Consulting
sweet	sweet	✓	Tiara Consulting
Ball	B1	✓	Tiara Consulting
Stablizer	stablizer#1	✓	Tiara Consulting
Watch	Watch#1	✓	Tiara Consulting
pot	pot	✓	Tiara Consulting

### 2.3. Sync Order from Ship Station to Zoho CRM Sales Order

After the successful installation of the Ship Station Extension, the following custom fields are created after in the Zoho CRM Sales order module.

- ❖ **Ship Station order ID** : Text Field
- ❖ **Ship Station Store ID** : Text Field
- ❖ **Ship Station Warehouse ID** : Text Field
- ❖ **Ship Station Carrier Code** : Text Field
- ❖ **Ship Station Package Code** : Text Field
- ❖ **Ship Station Service Code** : Text Field
- ❖ **Ship Station Confirmation** : Text Field
- ❖ **Ship Station Order Status** : Text Field
- ❖ **Ship Station Order Date** : Date Field
- ❖ **Ship Station Payment Date** : Date Field
- ❖ **Ship Station Ship Date** : Date Field
- ❖ **Ship Station Customer Notes** : Multi Line Field
- ❖ **Ship Station Internal Notes** : Multi Line Field
- ❖ **Integrated from Ship Station** : Checkbox



After successful installation and authorization of the extension (API Key & API Secret), all the Orders from Ship Station will be created in Zoho CRM Sales Order module. Any data changes in the Ship Station Order will be automatically created/updated in the Zoho CRM Sales Order module.

<input type="checkbox"/>	SUBJECT	STATUS	GRAND TOTAL	DEAL NAME	CONTACT NAME	ACCOUNT NAME	SALES ORDER OWNER
<input type="checkbox"/>	100065	Created	\$ 50.00		Lokesh	Kalishwari	Tiara Consulting
<input type="checkbox"/>	100064	Created	\$ 10.00		Lokesh	ZOHO COMPANY	Tiara Consulting
<input type="checkbox"/>	100063		\$ 50.00		Raghul	Aptiara	Tiara Consulting
<input type="checkbox"/>	100061	Created	\$ 1,000.00		Raghul	Onhold	Tiara Consulting
<input type="checkbox"/>	100057	Created	\$ 20.00		Gary L Young	SamSung Galaxy	Tiara Consulting
<input type="checkbox"/>	100060		\$ 1,000.00		Gary L Young	White	Tiara Consulting

Total Count: 6 10 Records Per Page < 1 to 6 >

### 3. Ship Station Sync History

Ship Station Sync History module is a custom module that will be created inside the Zoho CRM account to which will show the Integration statistics. Total Count shows the details of the integrated records from Ship Station to Zoho CRM in respective modules. Below are the details of the custom tabs created by the extension within Ship Station sync history module.

- ❖ **Orders**
- ❖ **Products**
- ❖ **Customers**

The “**Orders**” tab will show the latest records in a Sales Order Module. The Orders records in the grid with the details of Sales Order Number, Ship Station Order ID, Ship Station Order Date, Ship Station Payment Date, Total Amount and Ship Station Status.

**Ship Station Sync History**

**Total Count**

Total Orders <b>3</b>	Total Products <b>9</b>	Total Customers <b>5</b>
--------------------------	----------------------------	-----------------------------

**Latest Records**

Orders

Products

Customers

Sales Order Number	Ship Station Order ID	Ship Station Order Date	Ship Station Payment Date	Total Amount	Ship Station Status
100065	12359825	2020-12-06	2020-12-06	50	awaiting_shipment
100053	11581109	2020-12-02	2020-12-02	200	awaiting_shipment
100056	11583491	2020-12-02	2020-12-02	60	awaiting_shipment

The “**Products**” tab will show the latest records in a Products Module. The Products records with the details of Product Name, Product Code, Ship Station Product ID and Unit Price details.

Ship Station Sync History

Total Count

Total Orders <b>3</b>	Total Products <b>9</b>	Total Customers <b>5</b>
--------------------------	----------------------------	-----------------------------

Latest Records

Orders
Products
Customers

Product Name	Product Code	Ship Station Product ID	Unit Price
laptop	ABC123	2112619	200
notes	notes#1	2162069	50
Books	Books#1	2464905	10

The “**Customer**” tab will show the latest records in a Contacts Module. The customer records with the details of Customer’s Name, Email, Ship Station Customer ID and Phone number details.

Ship Station Sync History

Total Count

Total Orders <b>3</b>	Total Products <b>9</b>	Total Customers <b>5</b>
--------------------------	----------------------------	-----------------------------

Latest Records

Orders
Products
Customers

Customer Name	Email	Ship Station Customer ID	Phone
Nithees	nagarajs271998@gmail.com	4592775	7539963903
Mugaesh	mugesh@gmail.com	6652183	
Lokesh	rajraj271998@gmail.com	4600210	555-555-5555

## 4. Ship Station Error Logs

Ship Station Error Logs module is a custom module that is used to manage the records that are not integrated with the Zoho CRM from Ship Station. The error log will show the record that is not integrated with the reason for the integration failure. Following are the custom fields that are created by the extension within Ship Station Error logs module.

- ❖ **Module Name** : Text Field
- ❖ **Error Reason** : Multi Line Field
- ❖ **Resource Type** : Text Field

- ❖ **Resource Url** : Text Field
- ❖ **CRM API Request** : Multi Line Field
- ❖ **Is Bulk Error** : Check Box
- ❖ **Order ID** : Text Field

**Ship Station Error Log Information**

Ship Station Error Log Name

Ship Station Error Log Owner

Exchange Rate

Currency

Error Reason

Module Name

Resource Type

Resource Url

CRM API Request

Order ID

Is Bulk Error

SHIP STATION ERROR LOG NAME	SHIP STATION ERROR LOG OWNER	MODIFIED TIME
<input type="checkbox"/> <a href="#">Ship Station Sales Order Creation Error</a>	Tiara Consulting	Dec 10, 2020 02:29 PM
<input type="checkbox"/> <a href="#">Ship Station Sales Order Creation Error</a>	Tiara Consulting	Dec 10, 2020 02:08 PM
<input type="checkbox"/> <a href="#">Ship Station Sales Order Creation Error</a>	Tiara Consulting	Dec 10, 2020 02:08 PM
<input type="checkbox"/> <a href="#">Ship Station Sales Order Creation Error</a>	Tiara Consulting	Dec 10, 2020 02:00 PM
<input type="checkbox"/> <a href="#">Ship Station Sales Order Creation Error</a>	Tiara Consulting	Dec 10, 2020 01:56 PM

## 5. Custom Button Actions

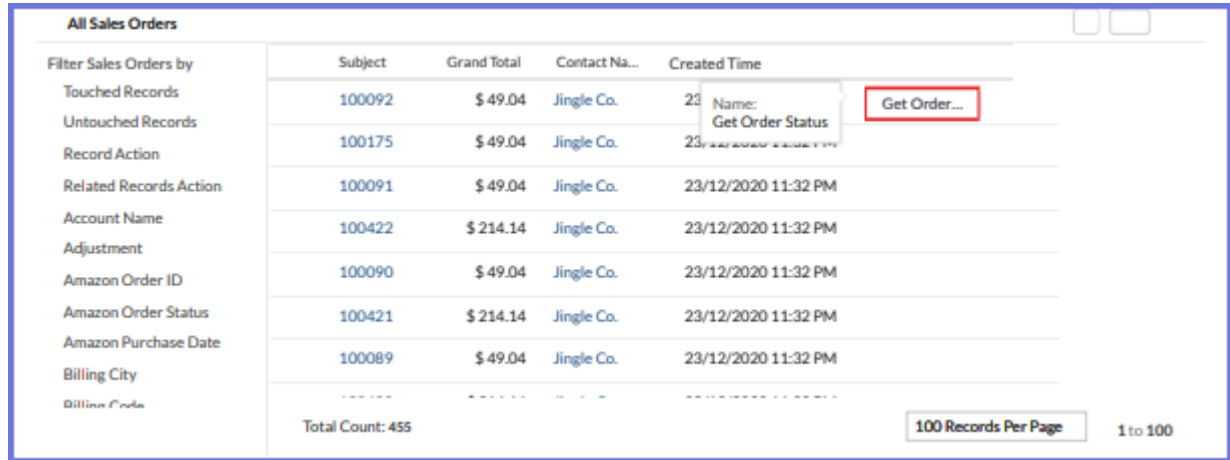
CRM Administrators can create new buttons and define a set of actions based on their requirements. Custom Buttons in Zoho CRM can be used to connect your CRM with third party applications, connect different Zoho CRM modules or connect with other Zoho applications.

This extension will create three custom buttons in following locations.

- ❖ Get Order Status (Module: Sales Order. Position: List View - Each record)
- ❖ Get Bulk Order Status (Module: Sales Order. Position: List View - Mass Action Menu)
- ❖ Sync (Module: Ship Staion Error Logs. Position: List View - Each Record)

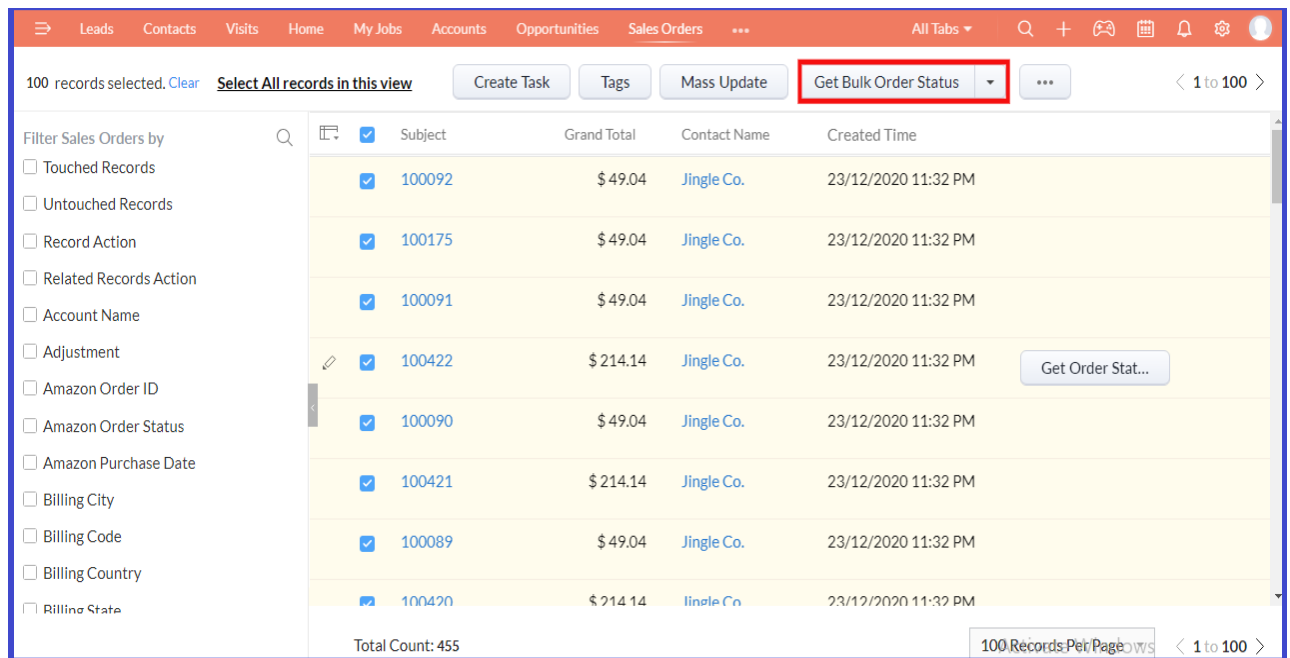
## 5.1. Button - Get Order Status

In Sales Order, we have created **“Get Order Status”** button in List View – For Each Record Position. By clicking this button will get you current Status of the ShipStation Order and update the status back into "Ship Station Order Status" field in Sales Order.



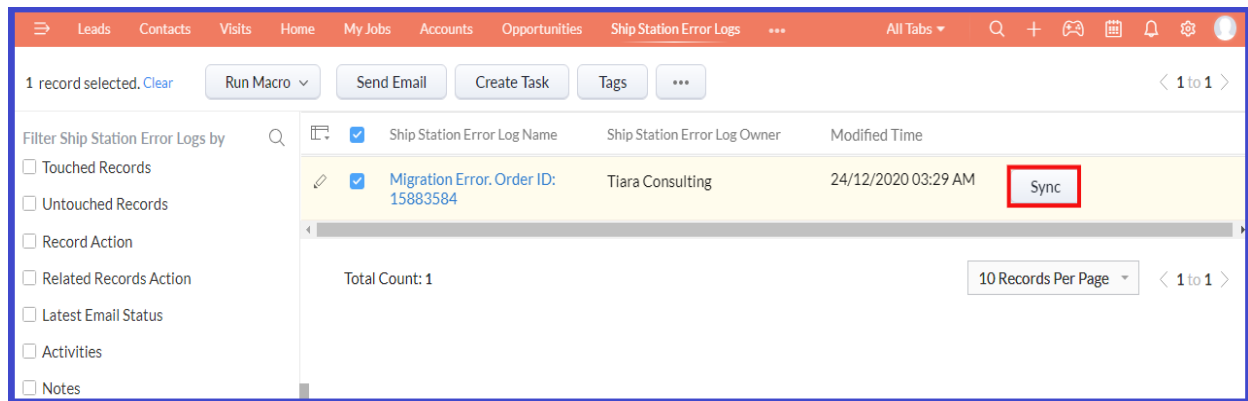
## 5.2. Button - Get Bulk Order Status

In Sales Order list view, we have created **“Get Order Status”** button in List View - Mass Action Position. When you selecting Sales Order (By clicking check box) you can see the Get Bulk Order Status button. By clicking the Get Bulk Order Status button will get you current Status of all the Sales Order and update the status back into "ShipStation Order Status" field in Sales Orders.



### 5.3. Button - Sync Error Log record

In Ship Station Error Log Module list, we have created “**Sync**” button in – For Each Record Position. By clicking this button will get you to sync the error record into a Sales Order. Also it will throw the function details as message popup in the Zoho CRM.



## 6. Support Contacts for Ship Station Order Management -Tiara Help Desk.

Thank you for installing Ship Station Order Management. If you have any questions or facing installation issues, please contact Tiara support Desk for Zoho extensions via email at [zohosupport@tiaraconsulting.com](mailto:zohosupport@tiaraconsulting.com) or call us at **(925) 218 4080**.