

Automation in ShipStation

Webinar Guide



Support
Webinars

Automation in ShipStation

In this webinar, you can expect to learn:

1. Which import automations are available in ShipStation.
2. How preset groups, product defaults, service mappings, and automation rules work with each other.
3. How to create preset groups, product defaults, service mappings, and automation rules.
4. How to edit your Orders and Shipments grids.
5. How to create shipping presets and hotkeys.
6. How to use filters and views to save time.
7. How to create custom packaging settings in ShipStation.

At the end of the instruction time, we will answer a few audience questions so feel free to write some down as we go along!

Notes

Glossary of Terms

Automation: An action performed in ShipStation so that you don't have to do that same task manually.

Automation rule: A rule which tells ShipStation to automatically perform a specific action when specific criteria are met.

Custom packaging: A pre-saved setting which indicates package dimensions which can be applied to orders.

Custom views: A custom view is a set of enabled filters and page layout selections in your Orders and Shipments tabs that you can save for future use.

Import automation: An automatic process that runs when an order imports into ShipStation.

Preset group: Preset product settings which are applied to multiple products at once.

Product default: Shipment details that are applied to specific products in ShipStation.

Service mapping: An automation which applies specific shipping services to an order based on the shipment option chosen by the customer during checkout.

Shipping preset: A group of shipment settings which can be applied to an order all at once.



Webinar Outline

A. Intro to Automation

1. Automation workflow
2. Import automations vs. presets
3. Order of import automations

B. Import automations

1. Preset groups
2. Product defaults
3. Service mapping
4. Automation rules

C. Presets

1. Shipping presets
2. Custom views
3. Custom packaging

D. Follow-up

1. Contacting Support
2. Answer questions (Q&A)

