



 **BatchMaster WEB**
A Truly Web-Based ERP!

BatchMaster Web – Ship Station

User Guide

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About the Manual

Purpose of the Manual

This user guide provides instructions for using BatchMaster Enterprise. The scope of the document is limited to training users on how various BatchMaster modules are inter-related, the purpose of various BatchMaster screens, and the procedural steps to maintain them. The training objective is to help the user get hands-on experience of how BatchMaster Enterprise functions.

This document aids as a hand-out during training and as an introduction to other manuals. It is not as descriptive as other accompanying manuals, but it is packed with necessary and important information that is required for someone to use BatchMaster Enterprise as a new user.

We designed the user guide based on experience obtained from numerous training sessions. This document aims to strengthen user knowledge on the functioning of BatchMaster Enterprise.

Target Audience

This document is intended for a vast group of people which may include Trainers, VARs, Customers, and even BatchMaster employees who are undergoing BatchMaster training. We hope it will be of immense use as a conceptual guide for Trainers, as a resource material for VARs and customers, and as a reference guide for existing BatchMaster Users and employees.

Organization

The user guide is organized module-wise to reduce bulkiness and enhance usability. Each module contains an overview of the module, concepts you must know before you begin using the module, an overview or purpose of the screen, how to maintain data in the screen, Key Points, and FAQs. Examples have been included to help you understand the logic better and maintain data quickly.

Symbols & Conventions

Symbol	Description
	Note
	Mandatory setting
	Tips

Convention	Description
Italicized (Sales Order Entry)	Module name, screen name & components
" " ("BatchMaster Web Accounting Guide")	Reference document

Abbreviation	Description
API	Application Programming Interface
SO	Sales Order



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1 Overview

ShipStation is a leading provider of a web-based order fulfillment and shipping platform that is designed to help commercial businesses to manage the shipping workflow efficiently. It integrates with third-party applications that act as carriers, selling channels to streamline the consignment processing of orders. It enables third-party applications to enable their business for enhancing the overall supply chain process. Integrating BatchMaster Web with Ship Station offers following advantages:

- Automating order fulfillment with efficiency.
- Obtaining Real-time shipment tracking information via the Webhooks.
- Cost and Time effective selection from the available courier companies via the Ship Station.

2 What is this document all about?

This document outlines the integration basics, prerequisites, and Ship Station integration workflow for the BatchMaster Web. It also details how the sales and its dispatch data are uploaded to the Ship Station. In response from ShipStation, the shipment order fulfillment data gets imported back to the BatchMaster Web. This document illustrate following aspects of Ship Station Integration:

- Brief introduction of integration system via the process flow diagram.
- Explanation of how interaction proceeds between the BatchMaster Web with Ship Station.
- Purpose of integrating BatchMaster Web with Ship Station, and the role of Webhooks.

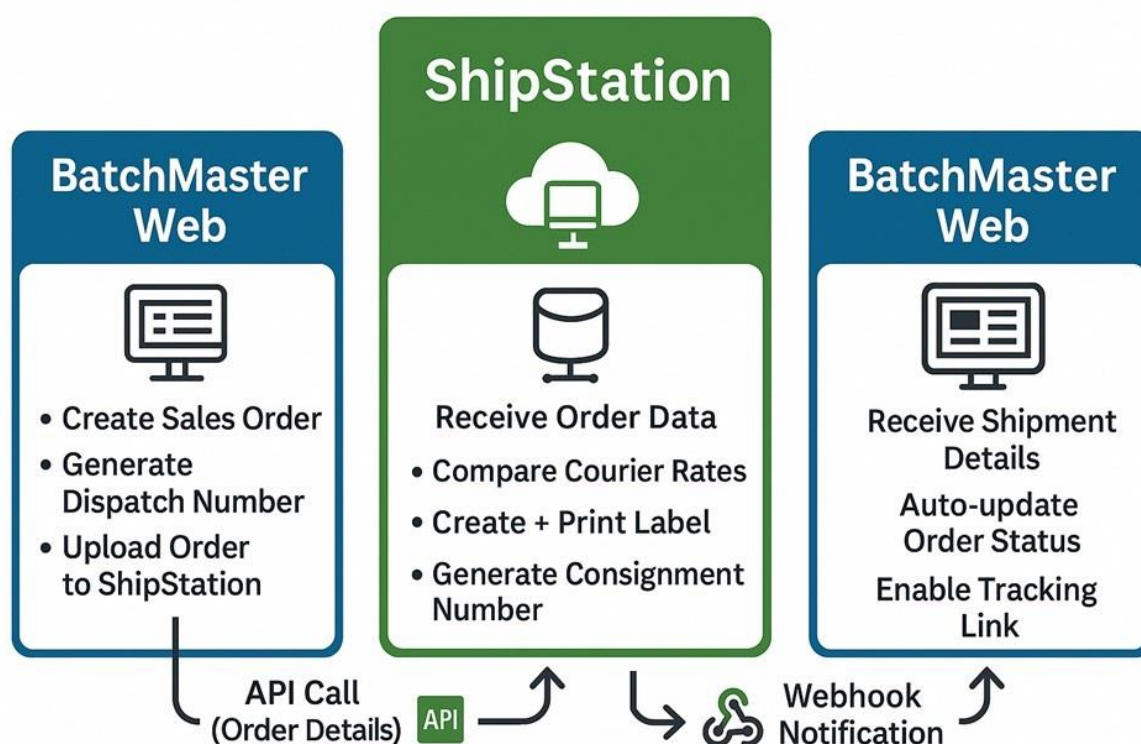
2.1 What is Integration?

Integration is the procedure of linking and syncing the ERP system with added business applications to create a simplified experience for catching, tracing, and examining real-time data. The process of creating sales orders is strategic from the point of view of sales and shipment and involves a streamlined process flow with various checkpoints. The purpose of the BatchMaster Web - Ship Station Integration User Guide is to build an understanding of concepts and establish guidelines for the use of those checkpoints.



2.2 How does the Information flow?

When Ship Station is integrated with BatchMaster Web, it creates a seamless flow of data between the two systems, automating manual data upload/download processes and improving overall efficiency of the process flow that initiates from Sales Order items to their dispatch and their delivery. The shipment consignment details are further auto-updated to the BatchMaster Web from the Ship Station.



2.3 Key Components & Their Roles

2.3.1 BatchMaster Web

In BatchMaster Web, you can perform the following tasks:

- Handling sales order items for delivery.
- Generating a dispatch number via the Maintain Shipment screen.
- Uploading sales order details to Ship Station and obtaining an order ID reference number from Ship Station.



2.3.2 Ship Station

- Obtaining details of the Sales Order from BatchMaster Web with dispatch number.
- Propose courier prices and their estimated delivery time for selecting an appropriate courier company.
- Calculating courier price from the weight of the sales order items and their expected delivery time.
- Generating consignment numbers after making payment to the courier company.

2.3.3 Webhooks

- Webhooks are responsible for generating hyperlinks of shipment tracking.
- Webhooks send notifications for *Fulfillment Shipped* and *On Orders Shipped*.
- Webhook link contains relevant consignment details and auto update the related information to the BatchMaster Web.

3 Pre Requisites

3.1 BatchMaster Web - Module Setup Screen

To integrate BatchMaster Web with Ship Station, you need to maintain various defaults on the *Shipment Integration Defaults* located under the *Sales Setup* option.

GoTo: Configuration → Module Setup → Sales Setup.



Module Setup

Select Module: Sales Setup

Approver Source ▼

Default Series ▼

Entry Options ▼

Invoice Series Options ▼

Order Steps ▼

Other Parameter ▼

Revenue Account ▼

Sales Commission ▼

Shipment Options ▼

ShipStation Integration Defaults ▲

Parameter Description	Default Value	Help
API Key	191e1f876c314c75845c0bedb5cdd868	?
API Secret	2bdb728e55794ff4aa5a0079043aa281	?
Environment	Sandbox ▼	?
Webhook	Yes ▼	?
ShipStation Implementation	Yes ▼	?

Save Close

Ship Station Integration Defaults

Use this section to configure the integration between BatchMaster Web and ShipStation (a popular shipping and order fulfillment platform). You can control the data exchange between BatchMaster Web and Ship Station by using the settings under this section.

API Key: Use this field to specify the unique ShipStation API key. This is a string of characters that authenticates BatchMaster Web when it connects to ShipStation's API (Application Programming Interface).

API Secret: Use this field to specify the ShipStation API secret key. It works in conjunction with the API key to further secure the connection between the BatchMaster Web and Ship Station.

Environment: Use this field to select which ShipStation environment you want to connect. The following options are available in the dropdown:

- **Sandbox:** Select this option to use the environment as a testing environment where you can experiment with the integration without affecting your live ShipStation data.
- **Production:** Select this option to use the environment as a live environment where you can process real orders.



Webhook: A webhook is a mechanism for ShipStation to send real-time notifications to BatchMaster about events, such as new orders, shipments, or cancellations. This field controls whether the webhook is enabled or disabled.

ShipStation Implementation: Use this field to specify the ShipStation integration as active or inactive. If this option is set to *Yes*, the *Upload Order To ShipStation* and *ShipStation* button appear on the *Maintain Shipment* screen of the BatchMaster Web.

3.2 BatchMaster Web Screens

- **Sales Order Screen:** Create Sales Order for the concerned Items.
- **Maintain Shipment Screen:** Generate a Dispatch Number for the same Sales Order via the *Maintain Shipment* screen.

4 BatchMaster Web – Ship Station Integration Workflow

1. After specifying *ShipStation Implementation* option as *Yes*, under the *Ship Station Integration Defaults* on the *Module Setup* screen – *Sales Setup* option, move on to the *Maintain Shipment* screen on the *BatchMaster Web*. The system enables *Upload To ShipStation* and *Open Ship Station* buttons.
 - **Upload To ShipStation:** On clicking *Upload To ShipStation* button, the system initiate the process of sending order data from your BatchMaster Web system to ShipStation. It triggers the integration process to create a new order record within ShipStation based on the selected sales order. This button should be clicked when you are ready to send the order information to ShipStation for fulfillment. Typically, use this button after the order is confirmed and all the necessary details are entered in BatchMaster Web. When clicked, this button performs the following actions:
 - **Data Extraction:** It gathers relevant order information from BatchMaster Web, including customer details, shipping address, order items, quantities, etc. This data is mapped to ShipStation's required fields.
 - **API Call:** BatchMaster Web system then makes an API call to ShipStation, sending the order data. This creates a new order in ShipStation.
 - **Open Ship Station:** On clicking *Open Ship Station* button, the system navigates you to the direct link of the ShipStation platform. It opens a new browser window or tab, taking you directly to your ShipStation account.



The Upload To ShipStation and Open ShipStation special functions, as shown below, offer a simple way to access ShipStation portal and upload the concerned data easily.

Action	Dispat...	SO Lin...	Item Key	Description	Location	Qty Order	Qty Dispatch	Scanned Qty	Qty Rem.	Unit	Status
[Icon]	62	1	RM0005	Sugar	INDOR	1.0000000	1.0000000	1.0000000	0.0000000	KG	NOT PI
[Icon]	62	2	RM0005	Sugar	INDOR	2.0000000	2.0000000	2.0000000	0.0000000	KG	NOT PI
[Icon]	62	3	RM0005	Sugar	INDOR	3.0000000	3.0000000	3.0000000	0.0000000	KG	NOT PI
[Icon]	62	4	RM0005	Sugar	INDOR	4.0000000	4.0000000	4.0000000	0.0000000	KG	NOT PI
[Icon]	62	5	RM0005	Sugar	INDOR	5.0000000	5.0000000	5.0000000	0.0000000	KG	NOT PI

- On clicking *Upload To ShipStation* special function, the system displays a success message with the reference order number ID as shown below:

Action	Dispat...	SO Lin...	Item Key	Description	Location	Qty Order	Qty Dispatch	Scanned Qty	Qty Rem.	Unit	Status	Req Date	
[Icon]	62	1	RM0005	Order successfully Uploaded To ShipStation.(Order Id: 53293311)							KG	NOT PROCESSED	06/12/24
[Icon]	62	2	RM0005	Save							KG	NOT PROCESSED	06/12/24
[Icon]	62	3	RM0005	Close							KG	NOT PROCESSED	06/12/24
[Icon]	62	4	RM0005	Sugar	INDOR	4.0000000	4.0000000	4.0000000	0.0000000	KG	NOT PROCESSED	06/12/24	

- Tap the *Open Ship Station* option to open the Ship Station portal, move on to the *Orders* section. In the left pane, click on the *Awaiting Shipment* section. The uploaded order appear on the Ship Station portal with the nomenclature as "<BatchMaster Web Sales Order Number> - < BatchMaster Web Dispatch Number>". Here the uploaded Sales Order from BatchMaster Web to Ship Station is "**SO000120**" and its Dispatch Number is "**62**". On the Ship Station portal the uploaded order display as "**SO000120-62**" in the *Order #* grid field with the *Order Date* and item count as displayed under the *Item SKU* field. Here 5 Items are there in Sales Order whose dispatch is already processed, hence the *Item SKU* field display its value as (5 Items).



ShipStation

Home Insights **Orders** Shipments Products Customers Scan Add-Ons Rates

Getting Started (2 of 3)

Search Orders... Advanced Search

Group By... Columns

Create + Print Label Get Rate Print Hold Assign To Tag New Order Bulk Update Allocate Other Actions

Filter By: Store Destination Assignee Tag Allocation Status Order Date Other Saved Filters Show Sidebar

Awaiting Shipment 2

Manual Orders 2

Shipped

Cancelled

Order Alerts

Open Batches

Create New Batch

Order #	Age	Order Date	Notes	Gift	Item SKU
100001	6 hrs	02/17/2025			(2 Items)
SO000120-62	251 days	06/12/2024			(5 Items)

SO000120-62 Batch Print

Shipping

Requested Not Specified

Ship From Kamlesh Chourey

Weight 75 (kg) 0 (g)

Service Select Service

Package Select Package

Size 0 L 0 W 0 H (in)

Confirmation

Viewing 1 - 2 of 2 1 Selected 250 per page

- Click on the “SO000120-62” order hyperlink in the grid field. The sales order’s shipment related details are displayed as shown below:

Manual Orders: Order No. SO000120-62

Batch Print

Order Summary

Order Details

The information listed summarises the order sent from your ShipStation store. Any updates from the store will be reflected here.

Order No. SO000120-62

Sold To ABC123

Ship To Address BatchMaster Software 123 MAIN STREET Irvine, CA 92615 USA

Shipment Details

Ship To Address Edit 123 MAIN STREET Irvine, CA 92615 USA Validate Address

Cost Summary Edit

Product	US\$5,500.00
Shipping	US\$0.00
Tax	US\$0.00
Total	US\$5,500.00
Total Paid	US\$5,500.00

Tax Information Edit

Deliver By Set Date

Assigned To None

Ship By Set Date

Batch Add To Batch

Hold Until Set Date

Configure Shipment Ship Today Preset

Requested Not Specified

Ship From Kamlesh Chourey

Weight kg 5 g 0 Scale

Service Best Rate Standard ShipStation Default

Package Select Package

Please select a package.

Create + Print Label

- Scroll down the web page to the bottom for viewing the Sales Order items that are available for shipping with their quantity and price.



Manual Orders: Order No. SO000120-62

Order Summary

Order Details

The information listed summarises the order sent from your ShipStation store. Any updates from the store will be reflected here.

Order No. SO000120-62

Sold To ABC123

Ship To Address
123 Main Street
Irvine, CA 92615
USA

Product Paid Date

Awaiting Shipment

Item Name	Quantity	Total
Sugar SKU: RM0005	1	US\$100.00
Sugar SKU: RM0005	2	US\$400.00
Sugar SKU: RM0005	3	US\$900.00
Sugar SKU: RM0005	4	US\$1,600.00
Sugar SKU: RM0005	5	US\$2,500.00

Notes

Customer Communication

Other Shipping Options

Shipment Options

☐ This shipment is non-machinable

Label Options

☐ Print postage on the shipping label for this shipment

Marketplace Options

☐ Do not notify marketplace

Please select a shipping service.
Please select a package.

Create + Print Label

6. To view the shipment rates with the available companies responsible for shipping, click on the *Browse Rates* option on the right side of the screen as shown below:

Manual Orders: Order No. SO000120-62

Order Summary

Order Details

The information listed summarises the order sent from your ShipStation store. Any updates from the store will be reflected here.

Order No. SO000120-62

Sold To ABC123

Ship To Address
BatchMaster Software
123 MAIN STREET
Irvine, CA 92615
USA

Shipment Details

Ship To Address Edit
BatchMaster Software
123 MAIN STREET
Irvine, CA 92615
USA

Cost Summary Edit

Product	US\$5,500.00
Shipping	US\$0.00
Tax	US\$0.00
Total	US\$5,500.00
Total Paid	US\$5,500.00

Tax Information Edit

Deliver By Set Date

Ship By Set Date

Hold Until Set Date

Assigned To None

Batch Add To Batch

Configure Shipment

Ship Today Preset

Requested Not Specified

Ship From Kamlesh Chourey

Weight kg 5 g 0 Scale

Service Best Rate Standard ShipStation Default

Package Select Package

Please select a package.

Create + Print Label

7. On clicking the *Browse Rates* button, the system displays *Rate Browser* popup window that enlist the recommended available courier companies with their proposed shipping amount calculated as per their weight. So that you can compare the costs and their expected delivery time to select the suitable courier company for shipping the items of the sales order.



Carrier	Service	Days	Rate
UPS®	Ground	—	US\$11.95
USPS	Parcel Select Ground	2 Days	US\$10.86
USPS	Ground Advantage	2 Days	US\$10.86
UPS®	Ground Saver	—	US\$12.26

8. The company that you click is for the list is responsible for shipping the sales order items. Eventually, the system enables *Configure Label* button available at the bottom right corner for the screen.

Carrier	Service	Days	Rate
UPS®	Ground	—	US\$11.95
USPS	Parcel Select Ground	2 Days	US\$10.86
USPS	Ground Advantage	2 Days	US\$10.86
UPS®	Ground Saver	—	US\$12.26

9. Click on the *Configure Label* button, the system displays order related various details for shipping.



Manual Orders: Order No. SO000120-62

Order Summary

Order Details

The information listed summarises the order sent from your ShipStation store. Any updates from the store will be reflected here.

Order No. SO000120-62

Sold To ABC123

Ship To Address
BatchMaster Software
123 MAIN STREET
Irvine, CA 92615
USA

123 MAIN STREET
Irvine, CA 92615
USA

Shipping US\$0.00
Tax US\$0.00
Total US\$5,500.00
Total Paid US\$5,500.00

Validate Address

☐ This is a gift

Deliver By
Set Date

Ship By
Set Date

Hold Until
Set Date

Date Paid
Set Date

Assigned To
None

Batch
Add To Batch

Ship From
Kamlesh Chourey

Weight
kg 5 g 0

Service
USPS Parcel Select Ground

Package
Package

Size (in)
L 0 W 0 H 0

Confirmation
No Confirmation

US\$10.86
Cost Review
Create + Print Label

10. Click on the *Create + Print Label* button. The system displays *Cost Review* popup window with the postage cost applicable for the shipment.

Manual Orders: Order No. SO000120-62

Order Summary

Order Details

The information listed summarises the order sent from your ShipStation store. Any updates from the store will be reflected here.

Order No. SO000120-62

Sold To ABC123

Ship To Address
BatchMaster Software
123 MAIN STREET
Irvine, CA 92615
USA

ShipStationCarrierServices - Free
Current Balance: US\$0.00

Stamps.com
USPS Parcel Select Ground US\$10.86

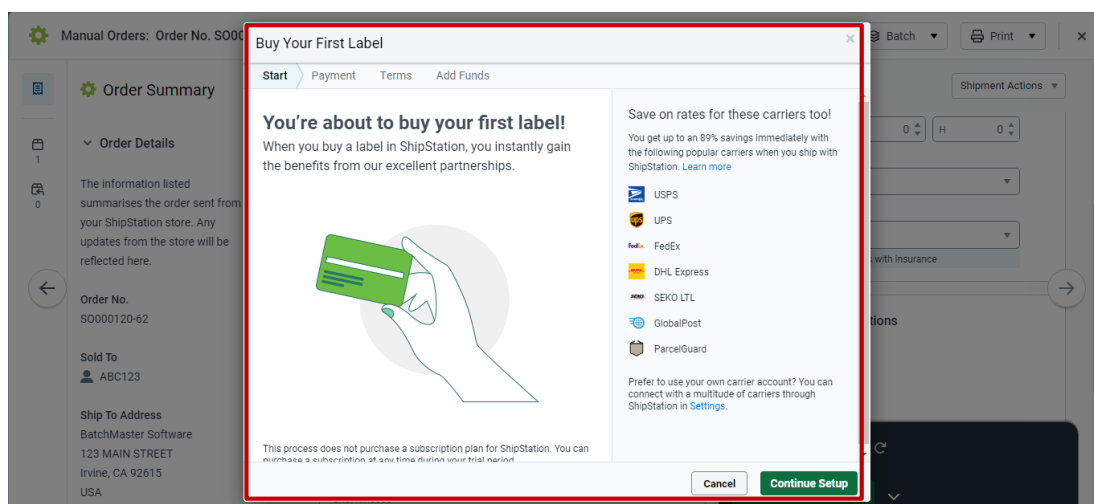
Postage Cost Subtotal: US\$10.86

Total Funds to Add: US\$0.00 | Total Postage Cost: US\$10.86

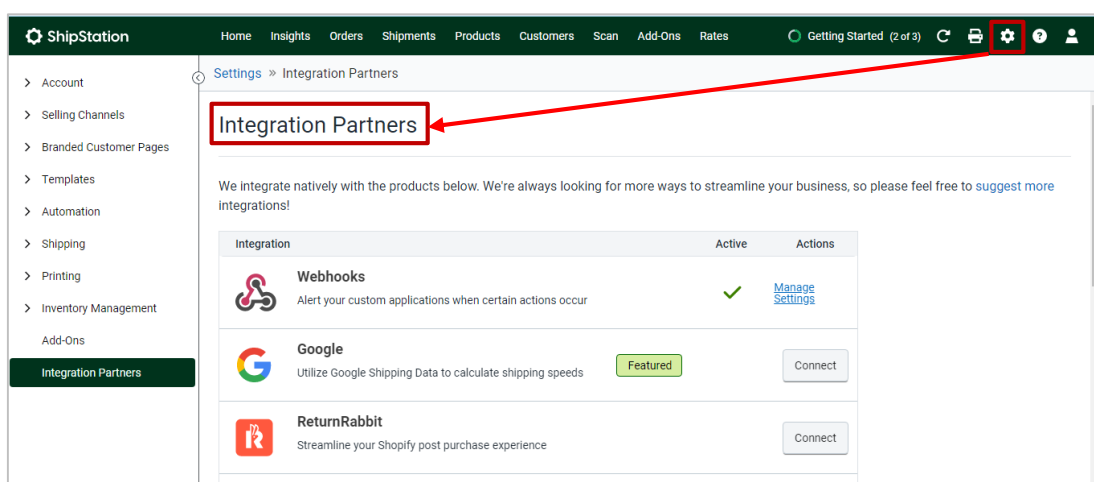
Close Apply Savings

US\$10.86
Cost Review
Create + Print Label

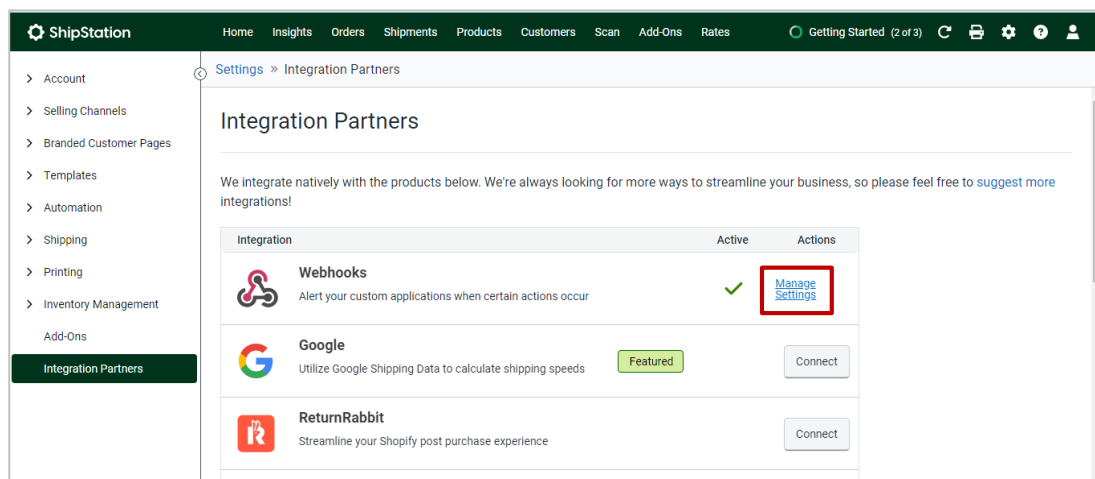
11. Proceed further to buy your first label i.e., one time process before you continue to make a payment to the courier company for consignment delivery. Complete is by clicking the *Continue Setup* button, and further proceed to book a consignment.



12. Once the consignment number is generated after making the payment to the courier company and order is shipped, the Ship Station Webhook will send the shipment details to BatchMaster Web from Ship Station via the BME Web API.
13. Click on the *Settings* option and move on to the *Integration Partners* option in the left pane.



14. Click on the *Manage Settings* option available under the *Actions* option in the grid as shown below:



15. On clicking the *Manage Settings* option, the Webhook Rest API of Ship Station share the information with the BatchMaster Web application via the hyperlinks as shown below:

- **Fulfilment Shipped:** This webhook is useful when a fulfillment provider i.e., courier company marks an order as shipped. This link contains shipping details such as consignment tracking number, carrier, and status fulfillment to the third-party i.e., BatchMaster Web. This hyperlink is for shipping and need real-time updates.
- **On Orders Shipped:** This webhook is useful when an order is shipped directly from ShipStation via the courier like UPS, FedEx, DHL etc. This link contains notification for the BatchMaster Web about their order shipments that ensures order tracking and inventory updates.

The above mentioned hyperlinks i.e., *Fulfilment Shipped* and *On Orders Shipped* facilitate the automated transfer of shipment details from Ship Station to the BatchMaster Web application.

