

Workflows in ShipStation

Webinar Guide



Support
Webinars

Workflows in ShipStation

In this webinar, you can expect to learn:

1. How to quickly filter through your orders.
2. How to create and use tags.
3. How to update and process multiple orders at once.
4. How to create and use shipping presets.
5. How to use batches.
6. How to use scan to view and scan to verify.

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

Batches: A group of orders that you can edit and process at once. Orders processed in a batch can later be located by their batch number which is applied when the batch is processed.

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.

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

Tag: Color-coded labels you can use to mark orders, products, or customers, making them easier to identify. You can also use tags as a criterion for automation rules.



Webinar Outline

A. Filters & Views

1. Creating & saving filters
2. Editing your grids

B. Tags

1. Create/edit tags
2. Orders & filters
3. Product & customer tags
4. Automation rules & tags

C. Orders in Bulk

1. Update multiple orders at once
2. Shipping presets
3. Batches

D. Scanners

1. Scan to view
2. Scan to verify

E. Follow-up

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

