ShipStation Merged Orders Automation

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Intro: This is the process that I put together to automate merging orders in ShipStation for our company. It has saved us so much time, frustration, [insert your current emotion], etc. Hopefully it helps get you closer to merged order automation bliss! (yes it is possible)

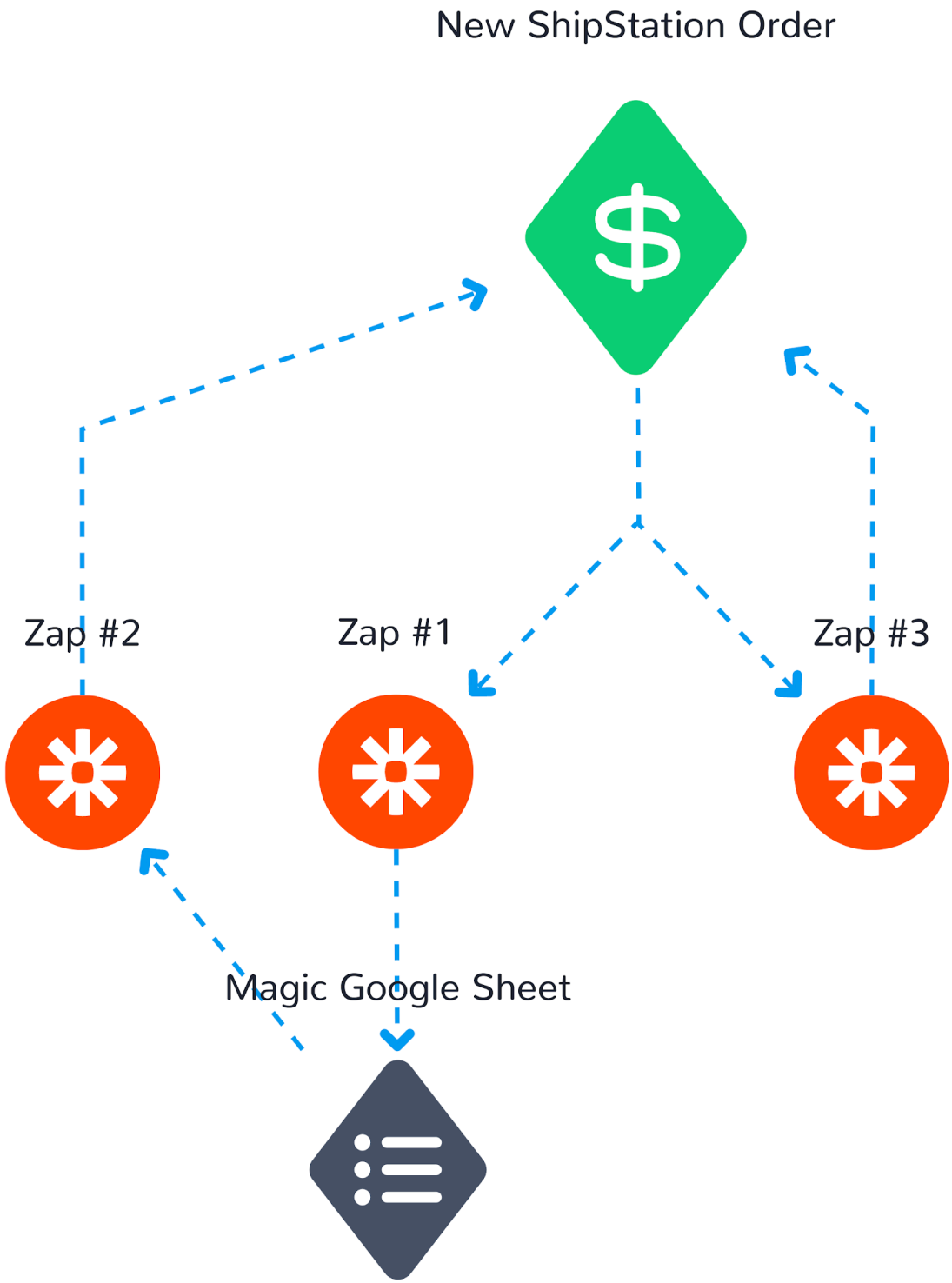
This is our use case and solution. Your the expert for your use case, and only you know the little tweaks and customizations that it will take to make this work for you.

Use Case: One of our sales channels (ClickBank) has multiple front end offers with subsequent up and down sell offers. The issue is that they come into ShipStation as separate orders. All these new orders hit our ShipStation account within 3-5 minutes of each other, and all land in a channel specific store.

Tools you need:

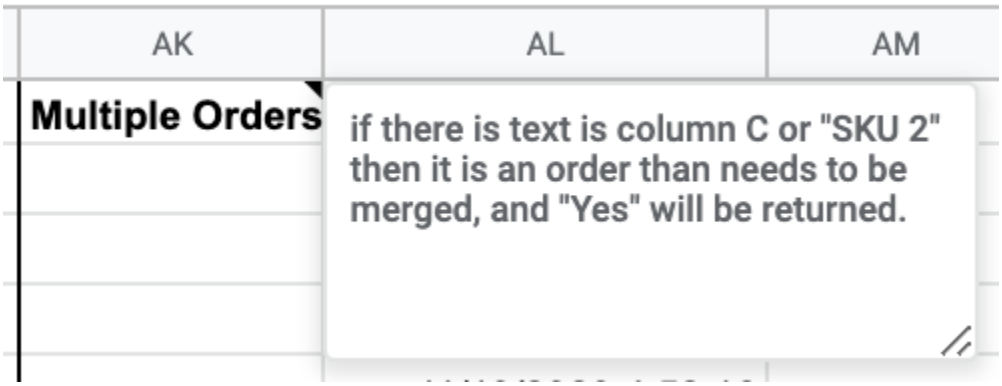
- Google Sheets
- Zapier Account
    - P.S. If your aren't already using Zapier to help automate your business, do it now. Seriously, there are so many little manual tasks that you or your teams are doing every day that you can automate (plus you can eliminate a lot of errors by systemizing). It's cheap, and will pay for itself by saving you time in so many different ways. The time it has saved us with just this one automation, has paid for itself 100+ times.

Basic Overview:



Step #1: Set up your Google Sheet

- Here is the template sheet (feel free to save yourself a copy)
    - Tab 1: This is just the input sheet, all new orders land here. Headers include all the fields that are needed from ShipStation
    - Tab 2: This just sorts tab 1 so that later vlookup's are more easily accomplished.
    - Tab 3: "Transformer" This is where the magic happens! There is a lot going on here, but I have tried to take detailed notes in the first cell of columns that needed explanations. They are marked by a little black triangle in the corner of the cell. Just hover over to view:



    - Tab 4: This is the sheet Zapier will be looking at to know what is a merged order that needs to be sent to ShipStation.
- If a note doesn't make sense, or you need a more in depth explanation feel free to shoot me an email.

* Note: This sheet identifies the multiple orders based on the customer email, then finds the "original" order based on the timestamp coming into ShipStation. After that it "merges" the data with some pretty simple formulas.

Step #2: New orders to Google Sheets (Zap #1)

- Here is the "Zap" that will bring your orders from ShipStation
    - It should let you copy the basic structure of the Zap, if needed I can email you a detailed video walkthrough.
    - All you need to do here is map out the fields coming from new ShipStation orders to Tab 1 on your new google sheet.
    - *Watch your formatting, ShipStation is picky.

Step #3: Merged orders to ShipStation (Zap #2)

- Here is the "Zap" you will need:
    - Again, copy the basic structure of the Zap, if needed I can email you a detailed video walkthrough.

    * Note: This "Zap" looks at Tab #4 of the Google Sheet to know which orders to import back to shipstation with the new merged information. For example, if we import order "1001" back into ShipStation with the same order number and unique order ID, but change the items, qty's, prices, etc. The original order will be essentially "overridden" with the new details we are adding.

Step #4: Identify and Cancel Upsell Orders (Zap #3)

- Here is the "Zap" you will need:
    - Again, copy the basic structure of the Zap, if needed I can email you a detailed video walkthrough.

* Note: This is the step that "cleans" out or cancels the orders that are no longer useful. (because we have merged them to another that is acting as the new original order). In our use case any orders that come through with "-U-" in the sku can be cancelled because they are the upsell products. Those items are already being added to the "original" order in our Google Sheet, and re-imported in Step #3. (you could probably add this step as a conditional logic branch in Zap #1, but it worked better in my mind to keep it separate)

This is one area where you need to think about your use case. Some questions you might want to ask yourself:

- How can you identify those orders differently?
- Can you import the new merged orders into a separate "store" to identify ones that need to ship? (making the orders in the other store irrelevant)
- What edits might you need to make to the Google sheet to identify what orders need to be cancelled? Maybe having them land in a separate tab, and triggering this Zap off that tab?

There are quite a few different ways you can accomplish this last step, and your use case will dictate how it needs to happen.

Conclusion: Hopefully you stuck it out to the end of this, and are going to give this implementation, or a version of it, a shot! I know the impact that its made for us, and I absolutely believe it can make a difference in your business too.

Please send me an email! - Tim Luff (tluff719@gmail.com) -

I would enjoy hearing your feedback!

- Did this help you?
- What does your use case look like?
- What changes did you make?
- What are some changes I should make?
- Are there scenarios I didn't think of?
- What parts of this SOP do I need to clarify?

Are you interested in getting updates on changes I am making, different use cases, and suggestions from others?

Enter your email on this Google form and I will add you to my contacts list so I can share what I am learning as others refine and use this process.

*Please Note: If you do need help or have questions with implementation **don't hesitate to reach out**. I work 60+, and my wife and I just had our first kid so I will do my best to respond as soon as possible, but please be patient!

Best,
Tim Luff
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