Webship+

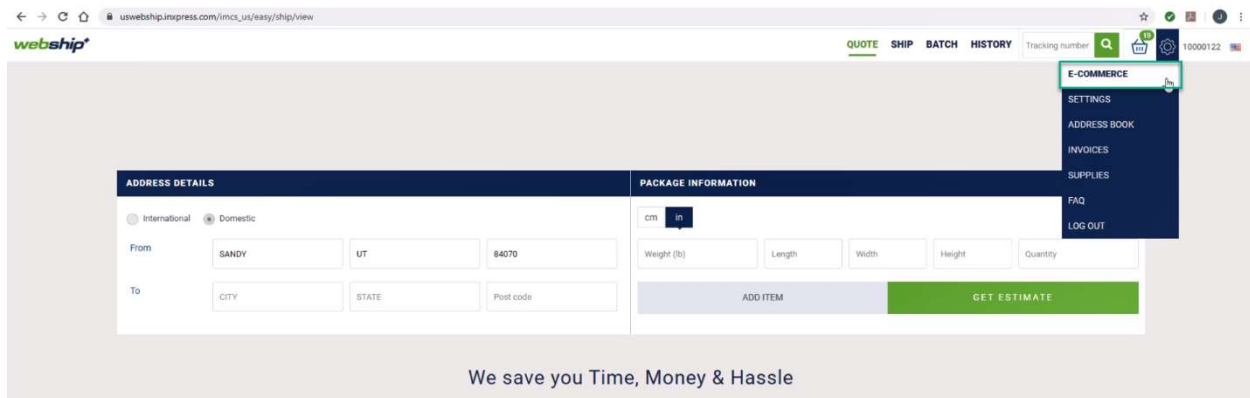**Magento 2 Setup Guide**

This guide provides the steps that will enable you to integrate your Magento 2 store with Webship+. Once your store is integrated new orders will import into Webship+ where you can fulfill them and create labels for shipping.
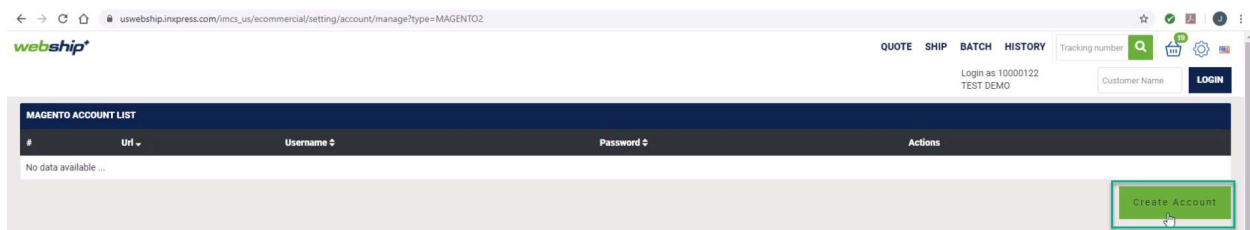
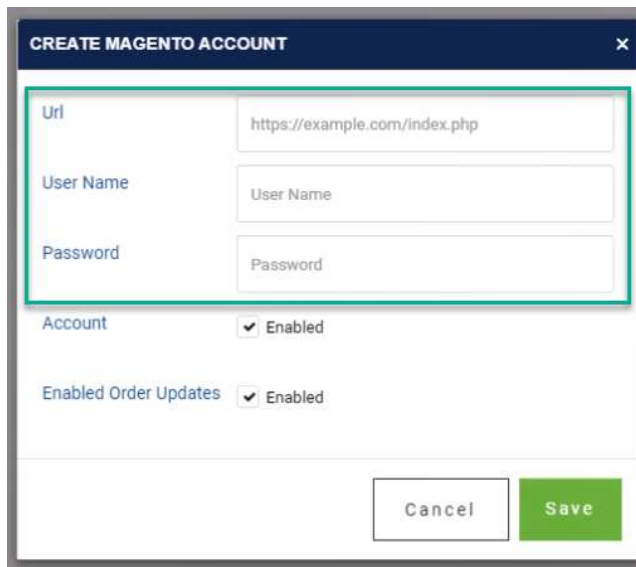1. After you have logged into Webship+ go to the "gear" menu and click on E-Commerce.

2. When the E-Commerce Setting screen opens, you'll see a list of e-commerce platforms that can be integrated with Webship+. Find Magento 2 in the list and click on View Accounts.

3. After the Magento 2 Account List opens, click on the Create Account button.

4. The Create Magento Account popup will appear. To add your Magento 2 account to Webship+ you will need your Magento 2 Site URL as well as a User Name and Password.
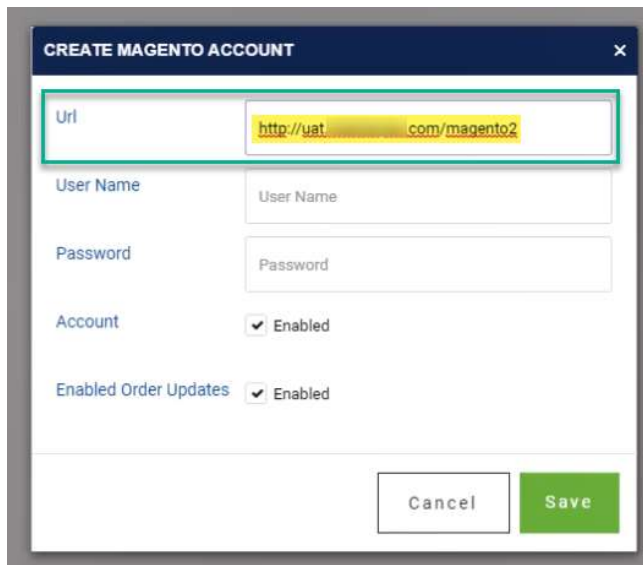
5. Start by adding your Magento 2 site URL. The URL should be for the location where the Magento 2 admin is hosted. For example if the URL shows "https://www.example.com/magento2/admin/...." then you would enter "https://www.example.com/magento2" in the URL field.

6. To get the Magento 2 User Name and Password you will need to log into your Magento 2 admin panel. Once logged into the Magento 2 admin panel start by making sure a Role is set up that will give the user the required resource access. Go to the System menu on the left side and then click on User Roles.
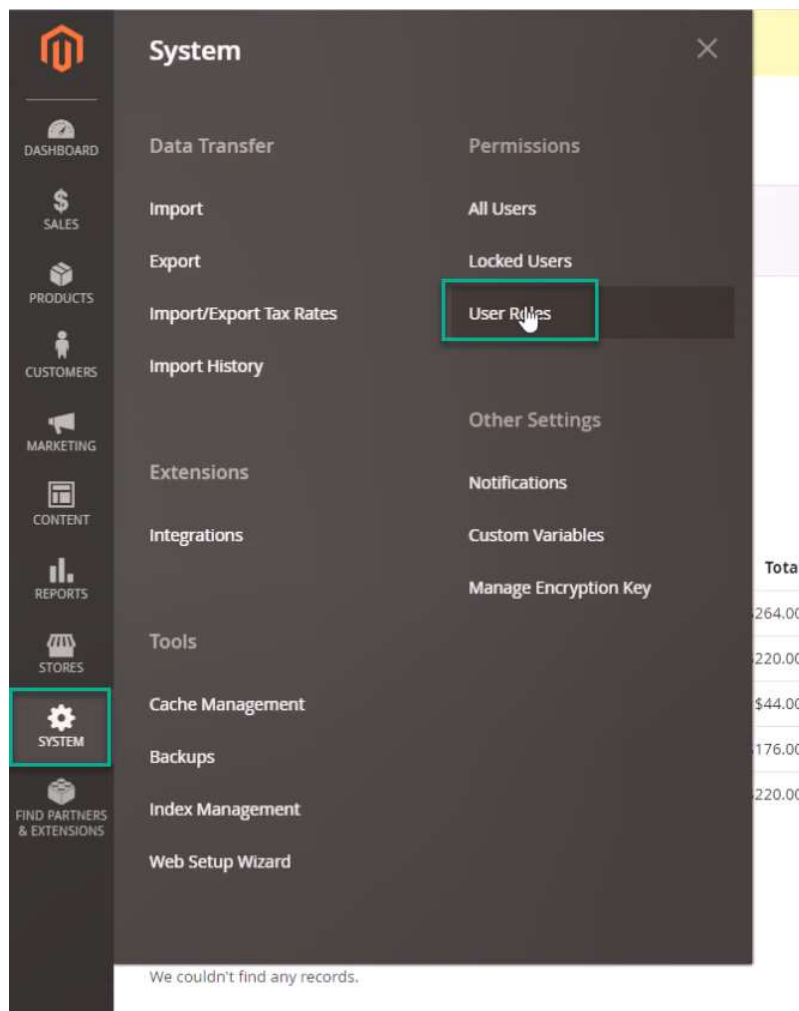
7. In the Roles screen, if a role already exists that provides the correct resource access then you can use it for the user. If not, then you'll need to click on the Add New Role button to add a new Role.
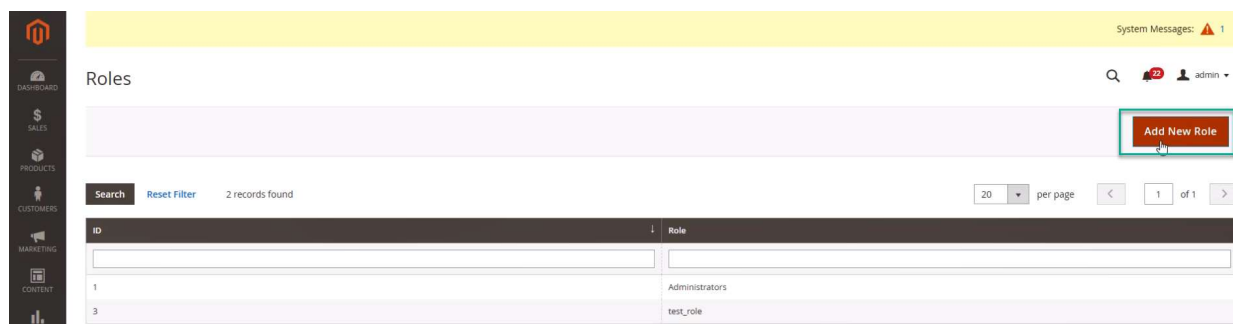
8. To add the new role you start by entering a Role Name and you also need to enter your Magento 2 admin password.

9. Next click on the Role Resources and select either "All" or "Custom" for the Resource Access. If Custom is selected ensure that you give the appropriate resource access required for fulfilling and shipping orders.

10. Once completed click on the Save Role button. You will now see the new role added in the Roles screen.

Roles

🔍 🔔22 👤 admin ▾

Add New Role

✓ You saved the role.

Search   Reset Filter   3 records found

20 ▾ per page   <   1 of 1   >

ID	Role
1	Administrators
3	test_role
14	US_Magento_2

11. Next a user needs to be set up. Go to the System menu, then click on All Users.

System   ✕

Data Transfer	Permissions
Import	All Users
Export	Locked Users
Import/Export Tax Rates	User Roles
Import History	
	Other Settings
Extensions	Notifications
Integrations	Custom Variables
	Manage Encryption Key
Tools	
Cache Management	
Backups	
Index Management	
Web Setup Wizard	

Sidebar: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, FIND PARTNERS & EXTENSIONS

12. In the Users screen click on the Add New User button.

13. In the New User screen the following needs to be entered for the User Info.
    a. User Name
    b. First Name
    c. Last Name
    d. Email
    e. Password – You can enter what you want the user's password to be.
    f. Password Confirmation – Make sure to enter the password exactly as you typed it the first time.
    g. Interface Locale – Change based on the country your site is located.
    h. Leave the account as Active.
    i. Your Password – this is your admin password for the admin panel.

14. Next click on the User Role and select the role that you will use to give this user the require resource access.

15. Once completed click on the Save User button. You will now see the new role added in the Users screen.
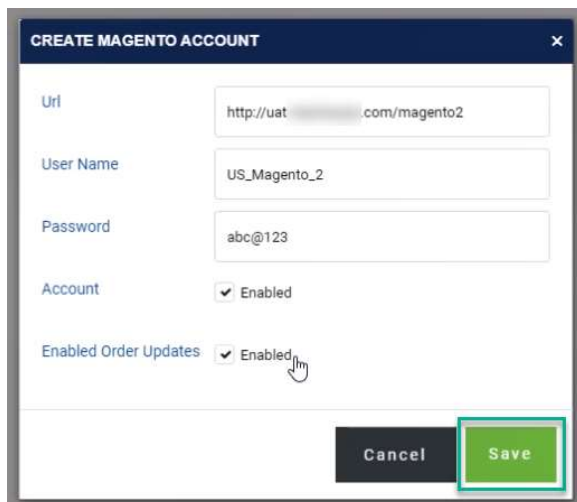
16. Now go back to Webship+ and in the Create Magento Account popup enter in the appropriate fields the User Name and Password that you just created in the Magento 2 admin panel.


17. By default, the Account and Enabled Order Updates are checked, but you may uncheck them if you want to disable the account or order updates.

18. Once you have everything filled out click on the Save button.

19. If the integration is successful, you'll get a message saying that the account has been added successfully. You can now see the account in the Magento 2 Account List.

The account added successfully

OK
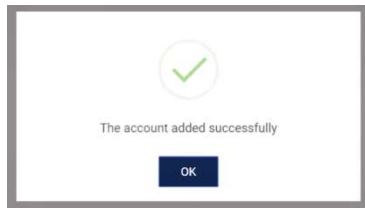
← → C ⟳ ⌂ uswebship.inxpress.com/imcs_us/ecommercial/setting/account/manage?type=MAGENTO2

webship⁺

QUOTE   SHIP   BATCH   HISTORY   Tracking number   🔍   🛒   ⚙   🇺🇸

Login as 10000122
TEST DEMO

Customer Name   **LOGIN**

MAGENTO ACCOUNT LIST

#	Url ⌄	Username ⇕	Password ⇕	Actions
1	http://uat.mavina-jsc.com/magento2	US_Magento_2	abc@123	📄 ✖

Create Account

20. Now when new orders are created in your Magento 2 store, they will import into Webship+ where you can find them in the Batch screen.

#000000023

← Back   Send Email   Credit Memo   Hold   Ship   Reorder

ORDER VIEW

| Information |
| Invoices |
| Credit Memos |
| Shipments |
| Comments History |

Order & Account Information

Order # 000000023 (The order confirmation email is not sent)

Order Date	Mar 4, 2020 2:43:51 PM
Order Status	Processing
Purchased From	Main Website Main Website Store Default Store View

Account Information

Customer Name	
Email	
Customer Group	General

Address Information

Billing Address Edit

Shipping Address Edit

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using USD.

Shipping & Handling Information

Flat Rate - Fixed $5.00

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Prod2	Invoiced	$44.00	$44.00	Ordered 1 Invoiced 1	$44.00	$0.00	0%	$0.00	$44.00

21. You are now ready to proceed with fulfilling the order and generate a shipping label to ship it.