

Self-Serve Integration Onboarding Instructions for Partners

Guide merchants through activating their integration with your system.

Overview and Purpose

Self-Serve Integration Onboarding (SSIO) allows DoorDash merchants to quickly and autonomously onboard their store through your POS system. This provider created guide will outline what actions are required by merchants to activate the integration. It should be hosted on your website so we can provide merchants with a direct link.

Writing Guidelines

It is important to write descriptions and steps that a high school student or a grandparent could easily understand. Merchants accessing your guide will have various levels of experience and technical knowledge. Create your SSIO guide with as many details as possible. You can view examples of merchant friendly instructions, details, and visuals at get.doordash.com/learning-center.

Visual Requirements

Adding visual elements to your SSIO guide helps increase the number of merchants that successfully integrate and reduces the overall time it takes to integrate.

Option 1

Provide a URL or link to existing content on your website or YouTube that shows steps for each task.

Option 2

Create a new video demonstration or screen recording of the steps to complete each task.

Option 3

Include screenshots* with written, step-by-step instructions on how to complete each task.

*If using screenshots, ensure that it clearly shows the steps you describe by highlighting or creating a markup of the specific area of the screen that is relevant to merchants.

Platform Updates

As your integration process or platform interface changes, this guide will need to be updated for merchants. Plan regular intervals to review and update your SSIO guide.

What to Include

Overview

Briefly describe the integration between your system and DoorDash.

Get started on [Add Your Company Name]

Describe how net new merchants can sign up for your system. Provide hyperlinks to existing website or video content. You can also use this section to share an onboarding checklist, the time to complete each activity, or any other relevant information for merchants using your system.

Add the DoorDash Integration

Describe how merchants can begin the onboarding process from your environment. Use a video recording or detailed screenshots when possible.

Authenticate with DoorDash

Describe the authentication step. Use a video recording or detailed screenshots when possible. Include a note about following the hyperlinked DoorDash Sign Up option if the merchant is not active on DoorDash yet.

Select a Store

Describe the store selection process. Show what the merchant will see when their DoorDash stores are returned via API. Use a video recording or detailed screenshots when possible.

Notes to Include or Explain Further:

- *Common Errors Troubleshooting*
 - *No stores to select*
 - *No business admin permissions*
 - *Not eligible to onboard*
- *Multiple Location Merchants*
 - *Describe how merchants with multiple locations can onboard in bulk through contacting their provider (CSV upload option in Developer Portal) or through a native multi-location “matching” experience.*

Menu Management

Describe how the merchant can create or edit their menu to ensure it is ready for ingestion.

Menu Management content may be better suited in a different order than described here depending on the natural flow of how merchants sign up for the DoorDash integration.

Once the merchant selects a store, DoorDash will automatically try to ingest a menu for that selected location.

Onboarding Status Updates

Describe how merchants will see updates related to their onboarding status. Use a video recording or detailed screenshots when possible.

This status is updated through the Onboarding Status webhooks or the GET /onboarding_status endpoint. The merchant should be able to see the updated statuses in the event of failures that require action.

Enable Integration

Describe how merchants will activate their location on the DoorDash integration. Use a video recording or detailed screenshots when possible.

This should also include a note about logging into the DoorDash Merchant Portal to activate their store and begin accepting orders if the merchant is not currently accepting orders.

Support and FAQs

Describe how merchants can contact you if they need assistance with any part of onboarding. Include any relevant FAQs merchants may have regarding your integration. For example: how to create and update their menu for integration, how to manage third-party orders from your system, how to pause their DoorDash store via integration, and how to handle item 86ing.

Additional Resources and Guidance

Please add additional sections or rename the sections provided so that they are more merchant-friendly or apply to your system.