Inventory Management

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Create New Inventory/SKUs

Initial Creation

1. Select Inventory from the side-navigation
2. Press the blue **Create Inventory** button at the top right
3. Here you will see a very simple page to fill out.

Title	Description
Name	The name of the new item
SKU	The item's SKU
Secondary SKU	As above, however this in unlikely needed, as Helm give control over linking many alternate SKUs in their linking page.
Item Type	Select **Inventory** or **Group**. More detail can be found in our Item Types document
Batching Type	Typically **No Batching**, but if you do make use of batches for this inventory item, set to **Batch Numbers**, not Serial Numbers

Inventory Page

With a basic inventory item created, you will be redirected to its full inventory page. If you have not been, inventory can be accessed via the side-navigation, selecting Inventory, finding or searching for the SKU/Item name and clicking the blue icon at the right of the item.

From here you have access to a plethora more options, I will cover some of these that have been deemed most important here. If you have these, fill them out.

General Inventory Info

Title	Description
Cost Price	£7.95
Retail Price	£7.95
HS Code	A 6+ digit code to classify what an item is for customs. Built from categories, materials, etc.
Country of Origin	United Kingdom
Description	A description of the item

Title	Description
Customs Description	An alternate description to briefly detail what the item if for customs on international orders. This could be Fabrics, Food Goods, etc.
Declared Value	The declared value of the inventory if the item value is 0, free item, etc.

Barcodes

Any barcodes for this inventory item. Typically there is only one. We use this to scan the items to verify for picking and packing, so please ensure this is correct.

Packing Parameters

This will have a row in here by default named **#1** with **Type PCS**.

This row is to represent a single piece of stock for this inventory item, and as such requires the weight, and measurements of a single piece of stock. This is used to determine packaging, and delivery options, the more correct this is the less likely for shipping issues to occur.

Stock Location Information

We at OFC will manage this, but this will give an overview of where the stock exists in our warehouse, and how much there is.

Import Inventory via CSV

Inventory can also be created via a CSV import, especially useful if you have hundred, or thousands of SKUs.

1. Go to Imports/Exports->Inventory
2. Select **General Inventory**
3. Import the CSV (ensure the mapping is correct)

Check Inventory Levels

Inventory Landing Page

On the landing page, accessed from the sidebar navigation and pressing Inventory you will see an overview of you inventory here.

Two of the pieces of information you will see if **Stock Available**, and **Stock Open**.

There is also a button on the left of each inventory item labelled **Stock Summary**, pressing this will open a modal with more stock information.

Inventory Page

On the Inventory page, accessed by pressing the paper and pencil icon on the right of each inventory item on the landing page.

There will be a **Stock Levels Summary** block that gives the same information as the **Stock Summary** button on the landing page.

One benefit of the inventory page is that is has a **Logs** button that when pressed will show stock movements, and any reductions along with the reason for it.

Inventory Overview

This is a WIP document, please bear with us

Inventory Landing Page

On the sidebar-nav select Inventory. This will bring you to an overview page that displays a paginated list of all your inventory items.

By default this will list any and all your inventory, but you can change this using the Filters button at the top of the page.

Here you can get some brief insight into the items at a glance such as:

- The inventory's Name
- Image
- SKU (also secondary SKU if set)
- If the item is an Inventory item or Group
- Which of your Marketplace Integrations and linked to sell this product
- Available and Open Stock
- The Item weight
- Any tags associated to the item
  We use tags internally to aid with processing orders, etc. Things such as printjobs, if they're Amazon orders, etc.

On here there are also two buttons.

The first on the left labelled **Stock Summary** when clicked will display a modal with all the stock information regarding the invetory.

The second on the **far right** of each Inventory with a **paper and pencil icon** when clicked will take you to the Inventory page for this item.

Inventory Page

This page offers much more insight into the products, and is where you will set the majority of the inventory data when updating or creating inventory.

General Inventory Info

Stock Levels Summary

Like the Stock Summary on the Landing Page, this displays the amount of stock. There is also a blue **Logs** button here that when pressed will display any stock, and location changes along with a reason as to why if it's been provided.

Default Tax Rate

Inventory Fabric Content

Packaging Parameters

Assembly Instructions

Inventory Categories

These are just used for filtering and management to try to keep things simple. For instance, you could have a category for Tablets that you can then use to filter by in the Inventory Landing Page. To add the inventory item to a category, just select or search for the category in the dropdown.

Bear in mind, that there are no categories by default, so these need to be created first.

Barcodes

Stock Settings

Stock Location Inventory

Global Stock Warning Level

Image

Purchase Order Details

Group Links

Suppliers

Assembly Components

Groups/Bundles

There may be cases where you would like to sell certain products together without it being a new product all together, or you want to sell boxes of 2,3,4 items while not wanting to have to manage different amounts of stock for the same thing.

This is where groups/bundles become a useful tool to employ. Groups work as a psuedo-item that contains multiple other items/quantities deepening on what you want.

Create a Group

This is super simple, as it's just the first step of create normal inventory.

1. Select Inventory on sidebar-navigation
2. Press **Create Inventory**
3. Fill out the form
   Add a Name. e.g. Starter Bundle
   A SKU
   Item Type: Group
   Batching Type: No Batching (each item without could be batched, but a bundle doesn't need to be)

This will redirect you to the new group's inventory page

Add Inventory to the new Group

From the Group's inventory page

1. Click **Add Inventory**
2. Select the individual item from the dropdown, and set the quantity you require
3. Press **Add Link**
4. Repeat the above for each item in the Group

We're all done. These groups will count as items, and if we update your marketplace with stock levels, will also update the stock levels fro the group SKUs you have. These levels will however be calculated based on how many of these groups can be created with the remaining stock of each of the inventory items within in. So if you need 2 of something for a group, but only have 1 in stock, the groups stock will show as 0 for your customers.

CSV Group Import

As well as doing manual creation, for bulk groups and inventory linking to groups a CSV upload can be used.

TODO: Add a CSV example or download here

1. Go to Imports/Exports->Inventory
2. Select 'Relationships'
3. Import the CSV (ensure mapping is correct before submitting)

Inventory Bulk Actions

On the Inventory Landing Page accessed via Inventory on the sidebar-navigation, a list of inventory will be displayed with check boxes to the left of each of them (and one at the top in the headings that will select all inventory visible on this page).

Clicking on these checkboxes will popup a bar at the bottom of the page that allows you to perform certain actions in bulk. Within this bar will be three dropdowns (drop-ups I suppose) will be shown.

Select Bulk Action

Anything from here is available in the Select Bulk Action dropdown when pressed. This list may change, but for now it contains the ability to.

Print Barcodes

Enable Stock Sync

Disable Stock Sync

Remove Ghost Assets

Set as Archived

Pause Stock Sync Until

Create Stock Take Schedule

Delete

This will **delete** the selected items, ensure that only the items wanted to be removed are selected. I would recommend applying filters where possible and still double, triple checking that everything is correct.

Clear Tags

Selecting this will remove all tags from the selected items.

Add Tag

This will add a new tag to each of the selected items tag-lists.

- Click Add Tag
- Fill out the textbox
- Press Submit

Categories

Similar to the Add Tag functionality, but with the ability to add or remove categories from the items categories lists.

This requires inventory categories to be set, this can be done following our Create Inventory Categories page.

- Click Categories
- Select Add/Remove Categories from the first dropdown
- Search for and select the category from the second dropdown
- Press Submit

Checking Batch Information

Check Per Inventory Item

To check batch information, go to the inventory item that uses batching. This can be accessed via Inventory and then clicking the manage button on the far right of the item.

Scroll down to **Stock Location Information** and click the first button (the 3 sliders)..

This will load the batch management for that specific item allowing you to see, or export the relevant batch data.

Batch Reports

Alternatively, you can use the Batch/Serial Numbers and Expiry report found in Reports on the sidebar and download the report(s) you'd like.

Link Helm Inventory SKU to Marketplace SKU

If the SKU from the Marketplace (Shopify, etc) matches the SKU from Helm, this will link automatically after a short period.

If you would like to verify, link the inventory manually, or setup alternate SKUs you can do so from the Link Inventory page.

- Go to Settings->Link Inventory
- Select the channel you want to link
  - The two left-most fields will be the product title and SKU from within the marketplace, and the third (dropdown) field will offer a selection of the SKUs we have in Helm to link to the product.
- Select the correct product from the dropdown, and when a popup at the top-right appears, it's now linked.