# Misc

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# Filters

At the top of most of the pages (especially in Landing pages) in Helm there is a bar that contains certain elements that are vastly useful when it comes to searching for certain things.

**Search**

This will filter the items on the page by the search string entered, this attempts to match names, SKUs, and key details.

**Filters**

Filters has a little more in the terms of what you can do with it however. Depending on the item we're look at Orders, Inventory, etc. there will be different options to choose from, but clicking on the Filters button will dropdown a list of all the options we have for the page.

Clicking into each of these options then gives even more options that we can set date ranges for, select certain categories, sales channels (marketplace integrations), Shipping Services, SKUs, etc. I highly recommend having  a click through the options available, you may find some of these are extremely useful for you!

If you find that a selected filter isn't needed, you can press it again and it will no longer be selected.

**Apply/Remove Filters**

To refresh the page with the filters you've selected you need to click the **Apply Filters** button to the right of the filters list.

To completely clear/reset all filters you can select the little arrow connected to Apply Filters and select Clear Filters. As stated this will remove all filters, so if there are only one or two you want to remove do this manually.

**Saved Filters**

Some filters you may find and just right for your use-case, but have a few steps to set up. In this case once a filter is set up, you can click **Saved Filters**, press the Save icon, add a name to the input, and press save.

Now if you ever want to use that filter again you can load the page, click **Saved Filters** select the filter from the dropdown and press **Apply** to the right of it.

Saved filters may only be available on Orders for the time being, but I'll put in a word to extend this functionality to elsewhere.

**Order Dates**

Helm by default filters by the last 2 weeks worth, to change this to a specific date-range, or to just get more dates you need to select the 'Date Received' and backdate the first date to whenever you desire. If you want full historic records this can be done by setting the first date to anywhere before your Helm account was set-up for orders (2025 for example).

**Ordering/Order By**

On the far right (at the top with the other filters) of both Orders, and Inventory there is another dropdown that may say 'Last Updated', 'Date Received' or the like, clicking on this will show all the ordering Helm offers, and allows you to change the position to ascending or descending for each of these.

# Create Inventory Categories

Categories are useful for filtering specific inventory on the Inventory Landing page.

Settings at the bottom of the sidebar navigation, then select Inventory Categories

**Create Category**

Using the blue Create Category button at the top right will open a modal that will ask for a name, and an (Optional) parent category.
So set a name that makes sense to you, i.e. T-shirts, and save. If you want to use parent/child categories for things like Clothing->Brand->T-shirts for example. Each category will need creating in order, with a parent set.

**Edit Category**

On the created category click the **paper and pencil** icon to re-open the same model and make any changes you wish.

**Delete Category**

On the created category click the red **bin** icon. This should ask if you're sure you want to delete, and then remove the category.

**List Products with this Category**

Clicking the first button (**the table**) will open a new page the will list the inventory with this category with some basic stock information.

# Returns

On Orders Landing Page, there are two statuses **Returned** and **Partially Returned**.

View Order Details and Check **Return History** block, this lists the items and amount of returned along with one of our pre-filled returned options.

### Return Terminal

From the sidebar-navigation select Return Terminal

Here you can filter orders

### Order Returns Report

In Reports search for **Order Returns Report**

# Stock Syncing

To Sync our warehouse stock to each of your integrations there are several locations to check/make sure are checked.

This allows for finer tuning of what items should be synced, and not.

**Per Item**

First, ensure your items you want to sync to the marketplace are set to sync. This will NOT sync still if your marketplace is not set to stock sync, this just allows you to control per-item level syncing.

Go to the Inventory landing page select the item you want and go to **Stock Settings** in here, change **Stock Sync** to Yes to sync from the warehouse stock, and No to have no syncing.

This can be done in bulk too if you want all your inventory, or those with certain tags, etc. to have **Stock Sync** enabled/disabled.
From the Inventory landing page, filter the page accordingly and select all, or each individual item you want to change the setting for, with these selected open **Select Bulk Action** from the bottom bar and from the dropdown select **Enable Stock Sync** or **Disable Stock Sync**, then **Submit Action**.

So, say we have tagged your inventory 'Dropship' for any stock we do not keep on hand here, but instead you manage. You would filter tags for Dropship, select all the items (maybe you'll need to adjust the amount shown per page, or go through each page), and Disable Stock Sync.

**Marketplace Sync**

From the sidebar navigation select Settings->Sales Channels.

On a per marketplace basis, edit the marketplace integration, go to the **Stock Control** tab, and check **Auto Sync Stock** to enable stock syncing, this will start a task to sync the stock levels.