Order Management

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Create a Manual Order

How to create a Manual Order

1. From the sidebar navigation select Orders
2. At the top-right of the white box, press the blue Create Order button.
   This will open a modal asking for an Order ID. Enter this here.
   You will be redirected to a new page for the new order you are creating.
3. From here you will see the standard order page
   This will have the order ID we set in the modal at the top
   And the status dropdown to the right of that will be set to **Draft** while we create the order
4. Fill out the order details on this page (Find out more about this in the Orders)
   This will need to include **Products**, **Contact Information**, and **Shipping and Invoice Details**
   If you have a contact created, you can instead click 'Update Contact & Tax Information', and 'Find Customer' at the top
   search for your customer's name, 'Select Customer', then 'Save'
5. Once you're happy with the order, select the dropdown at the top right and change it from **Draft** to **Despatch Ready**
   This will now get added to our lists, and a picker will process the order along with any of the automatic orders from your marketplace integrations
   If you would like us to check your first order before setting to Despatch ready please get in touch.

To learn more about the specific sections in the Order page, please refer to our Order Overview page.

Notes

Do not change the dropdown from Draft until you are entirely happy with the order, as once it's despatch ready our team may pick, and process the order immediately.

Copy an Existing Order

How to Copy an Existing Order

1. Go to the Order Landing Page, accessible via the sidebar navigation and selecting Orders.
2. Search for the Order you would like to duplicate using the search bar or filters
3. Check the box on the left of the Order you would like to copy
   This will popup a bar at the bottom of the page with new actions
4. Click the **Select Bulk Action** box, then click the dropdown that opens above it
5. Select Copy (With Products) or Copy (Without Products) depending on what you want to copy, and press **Submit**
   This will create a new Order with **Draft** status so that you can make edits as needed before setting to Despatch Ready.

Notes

If you would like to edit the new order, select it from the Order Landing Page and click the **Eye** icon, and make any adjustments.

Upload Order Documents

Certain orders may come in with a need for documentation to be attached.

Add a New Document

1. In these cases we would go to the Order page via the sidebar navigation, and clicking Orders.
2. Then find the order that requires documents and click the **Eye icon** on the far right of the order.
3. On the Order page, scroll down to the bottom and find the block named **Files**
4. Upload any files required here using the **Upload File** button

View Documents

In the same place (the order page), at the bottom in the **Files** block, click the eye icon for any of the attached documents.

Deleted Documents

Again, in the **Files** block. This time click the red bin icon to remove the document. This will ask if you're sure before doing so.

Cancel or Hold an Order

Order Landing Page

1. On the Order Landing page, search or filter for the Order(s) you wish to cancel/hold.
2. Select each of these Orders with the checkbox on the far left
3. Press **Set Status** on the bottom of the page
4. Click **Set As Cancelled** or **Set As On Hold**

Order Page

1. On the Order itself, change the dropdown at the top-right to **Cancelled** or **On Hold**.

Order Overview

Products
The first box will be titled with the integration (or manual) and the date the order was created, this is where we add/remove/edit products for the order.

The **+** icon at the top will allow you to add products to the order. Simply search the product in the first dropdown, this will auto-fill the name, sku, price and anything else we have in Helm.

You can add notes, or overwrite these details for this specific order is wanted, but typically all we need to do is press **Add Product**.

Order Totals

Customer Comments & Gift Note

Notes

Auto Stock Allocations

Contact & Tax Information

Shipping & Invoice Address Details

Requested Packaging

Order Tags

Any tags for the order, this will contain things such as print IDs, or any order-specific tags.

These are more-so internal, but we may have set up specific rules for your needs. If this is the case we will have informed you of the tags for these rules to get processed.

Files

Logs

Order Bulk Actions