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Dashboard

Upon login this is the absolute first thing you will be greeted with, acting as Helms index.

Global Search

This is useful to navigate without quite knowing where you're looking.

1. Click into the search-bar
   This will open a modal with another search-bar.
2. Enter your keywords, such as Order Number, customer name, inventory names, skus, etc.
3. Hit the **Enter** key
   This will search through Orders, POs, Inventory, Clients, Supplier, and everything else in Helm and display a list of results for each category.

Order Status Overview

This shows a selection of boxes, at the current time of writing this has been set to show Despatch Ready, Back Order, Packing, and Despatch Pending.

Clicking on any of these boxes will take you to the Orders landing page, with pre-set filters to show the orders with the statuses set.

Orders Overview

A diagram containing Created Orders, Despatch Orders, and a Despatched Sales Total.

This is useful to glance how many orders have come in per-day, and how many orders have been despatched per-day, to keep an eye on busiest days, and when most orders are fulfilled. The despatched sales total is useful to see the sale amount of the orders each day too.

Inventory Management

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

Title	Description
Description	A description of the item
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.

Inventory Management

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.

Order Management

Order Management

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

Purchase Orders

Creating a (Manual) Purchase Order in Helm

Manual Creation

1. From the sidebar go to Purchasing->Purchase Orders
2. Press the **Create Purchase Order** button
3. Select **Create Manual PO**
4. Add a PO Number
   Select your supplier from dropdown (can be yourself)
   Suppliers can be created on the Contacts page if needed
   Set warehouse to **Warehouse**
   Add an expected delivery date

5. This will load up a full Purchase Order page that should be fairly simple to understand
6. There may be no delivery address, but as it's coming to the warehouse you will want to set the details to:
   Units 13-17 Riverside Industrial Park
   Moody Lane
   Grimsby
   North Lincolnshire
   DN31 2AN

7. Click **Add Inventory**, you will need to do this for each individual SKU you are adding
8. Select the relevant item that is getting sent to the warehouse
9. Set the **quantity** to the amount that is getting delivered
10. Click **Create**

Final Part

Once the PO is added and looks good/has been sent wherever it needs to be sent this needs to be set as Submitted.

To do so, select the dropdown at the top-right and choose Submitted.

Uploading a Purchase Order CSV (ASN alternative)

CSV Upload (recommended)

A CSV example directly from Helm can be downloaded from the Import/Export Purchase Order page accessed through Imports/Export->Purchase Orders

This consists of the following (but may alter, so I recommend checking the CSV download from Helm on occasion).

Name	Description	Expected Value
*Purchase Order ID	A Unique ID for the Purchase Order	TIL-3251
*Supplier Email	The email address of the supplier (can be own email. Unless supplier has been created by you, it will be your main account holder's email)	
*Location ID	The location this item will be stocked to (Warehouse is 6, so choose 6)	6
Expected Delivery Date	When it should be getting to the warehouse	
*Product SKU	The SKU for the product on this line	PDT-123, etc
*Product Quantity	The amount of this product getting delivered	120
*Product Name	The name of the product	Product 123
Product Line Total Discount		0
Product Expected Delivery Date		
PO Notes		
Payment Currency		**GBP**, etc

Name	Description	Expected Value
Product Notes		
Product Delivered Quantity		
Product Unit Price		
Custom Fields	Any custom field data for the product(s)	

Uploading/Importing

Once the PO is completed

Go to Imports/Export->Purchase Orders

Upload the file

Check the mappings are correct (if you use the template they should be, but double check for safety)

Press Submit Mapped Data

Final Part

Once the PO is added and looks good/has been sent wherever it needs to be sent this needs to be set as Submitted.

To do so, select the dropdown at the top-right and choose Submitted.

Purchase Order additional features

From the PO page, you can track deliveries related to the PO, any notes added (by yourself, or OFC), and any logs for updates of the PO.

You can also print the PO for records, or to send to suppliers. Or could send the PO directly to the supplier via Helm.

Despatch Details

Order Tracking

Once an Order has been despatched by us at OFC there will be new buttons available on the Order on the Order Landing Page.

One of these is a file with a magnifing glass atop it. Hovering over this icon shows 'Despatch Details'

Click on this, this will take you to a Despatch Details page for the Order.

Here you can scroll to Tracking URL, or click Shipment History to get the tracking code(s) from there.

Despatch Details Overview

https://onlinefulfilmentcentre.myhelm.app/orders/despatch-details?id=385

Reports

Reports in Helm

Helm offers a fair amount of useful reports regarding Orders, Inventory, Batches, Orders, etc.

These are all accessed via Reports in the sidebar navigation.

You can scroll through all of the reports, search for them, or click the relevant category to be scrolled down to where you want to be.

There is also a custom reporting tool that allows you to make variations on the existing reports. Do let use know if these utilities do not meet your needs however, and we can discuss more bespoke solutions.

Stock History Report

Check Historical Stock Levels on a specific date

1. Access via the sidebar navigation directly by clicking Stock History Report
2. Select the specific Inventory item, or leave blank to get data for all inventory.
3. Select the date required
4. Download Report

This will download a CSV for the item(s) on that specific date

User Management

For staff Helm accounts

User Management

Create a User

Create a User

On the sidebar navigation select Settings then User Setup

Click New User

Fill out the:
Name
Email
Level: Select either Admin or Supervisor
Password
Confirm Password

and submit

Get the User to Update their Password

With a user created, they can now login to https://onlinefulfilmentcentre.myhelm.app

Give the user their details, and get them to login. Inform them to change their password on login (unless they set the password in the previous step).

This can be done by

Clicking the name at the top-right of Helm

Press My Account

On the new page click Update Password

Fill out the passwords, and press Update

Email

Hi X,

I have setup a Helm account for you.

Please login here: https://onlinefulfilmentcentre.myhelm.app/

With your email address, and the password:

I recommend changing your password when you login, this can be done by Clicking the name at the top-right of Helm, selecting My Account, then on the new page click Update Password.

Marketplace Integrations

Add a Marketplace Integration

Ensure you have account details, and/or any API keys, tokens, login details before adding an integration

Anything greyed out in this document is either for internal usage (by OFC), or no-longer required but retained for legacy.

I recommend reading the document in full before progressing. The original steps are for a Shopify site, but I have added additional information for other marketplaces below. The main thing for now is to ensure what is enabled and disabled. Further details on integrations will be provided at a later date.

1. **Go to Settings > Sales Channels**
2. **Add New Channel**
3. Select the marketplace **(Shopify, etc)** from the list and click **install**
   - If it doesn't show, there is potentially another integration already using it, in this case
     - **Exit**
     - Select the channel from the page
     - Add New Channel
4. Setup. Tab by tab match the below settings
   The following are the options for a Shopify integration, some names may differ, and some additional API keys/secrets may be needed if using an alternate marketplace. If you require assistance, or are unsure as to what to set please get in touch. *
   - **Credentials**
     - **Active** # Off (We will double check then enable this)
     - **Name** # A unique name for the channel (<clientname>_<channel>)
     - **Hostname** # Either first part of subdoamin, or clientref between slashes /<here>/
     - **Use Dc Credentials** # Checked
     - **Use Access Token** # Unchecked
     - **API Key** # Add anything, I recommend a hyphen (-) this will be pulled by Helm
     - **Password** # Add anything, I recommend a hyphen (-) this will be pulled by Helm
     - **Notify Customer** # Unchecked
     - **Use Restricted Location Orders** # Unchecked

    - **Get Orders** # Unchecked
    - **Download Product** # Checked
    - **Deduct Stock Via Orders** # Checked
    - **Auto Hold Orders** # Unchecked
    - **Manage Stock** # Checked
- **Settings**
    - **Fulfilment Client** # Client name (from dropdown)
    - **Warehouse** # Warehouse
    - **Import Products** # Unchecked
    - **Insufficient Stock Levels** # Back Order (from dropdown)
    - **Order Received Timeout Status** # On Hold
    - **Inventory Names** # Use internal names
- **Stock Control**
    - **Auto Sync Stock # Unchecked**
- **Brand**
    - **Inventory Names** # Use internal names
    - **Return Address** # Select the correct warehouse/client address (From dropdown)
- **Commercial Invoice**
    - **Sender Address** # Select the correct warehouse/client address (From dropdown)

5. Ensure that in the first tab '**Credentials**' that **Active** is not checked/on/coloured
   As we are currently in the process of moving from Mintsoft we need to verify the integration first, to ensure that it does not overwrite any stock, orders, etc. This is something you can enable in the future, but for now make sure it it **Not Active**
6. **Save Changes**
7. Click the Link button at the bottom of the integration in Helm
   This will load Shopify, etc. and request access
8. Accept the access request

*** Woocommerce**

Some fields from the above are not there, so ignore if a CTRL+F doesn't find them.

It requires and uses Store URL, Consumer Key, Consumer Secret in place of DC credentials

This is your full woocommerce site domain, and keys related from the following.
WooCommerce > Settings > Advanced > REST API
Add key, select user and permissions (Read/Write).
Generate API Key (Either add them straight into Helm, or copy to a notepad file temporarily, as they are not persistent!)

*** Ebay**

One of the simpler integrations, no API-keys, or specific URLs.

Once the integration is create in Helm click the link icon. This will redirect you to ebay, and request verification.

An issue we have found with clients with multiple ebay accounts, etc. When linking to Helm/Neuro, an alternate marketplace gets added US rather than UK for instance. To force a specific marketplace to get linked, this needs adding to the eBay login page you get redirected to. **&GLOBAL-ID=EBAY-GB** for the GB marketplace for instance.

*** B&Q**

Like Woocommerce, this uses secret keys and an API endpoint URL.

Needs automatically confirm orders checked as well, since B&Q doesn't do this, we need it to be done via Helm

*** Amazon**

Set the marketplace ID from the dropdown (The location your amazon marketplace is associated with, likely **UK**)

Select the types of orders Helm should recieve from Amazon

- **MFN (Merchant Fulfilment Network)**
  - You fulfil orders manually using your own warehouse and couriers

Order Statuses

- **Unshipped**
- **Shipping**

DO NOT enable DESPATCH OR FEEDBACK EMAILS for an Amazon sales channel.

Once the channel is setup in Helm, press the Connect Channel.

Login and/or Authorise

Select account and marketplace

Tick the checkbox to authorise Helm, and **Confirm**

Sometimes the feeds being set as UK 'cause issues, so the feed may need changing to US-eng. This should be attempted only if the product report response is coming in, but in an alternative language.

*** Etsy**

Name is the name in Helm

Account Nominal Code is the exact name of your etsy shop

When the popup is saved it will redirect you.

Click on the 'Connect Channel' button underneath the etsy integration

*** TikTok Shop**

Marketplace ID: UK

Fulfilment Channel: Seller

When linking you will need to select Europe->UK, and potentially add your email address before authorising the integration.

If you don't (and it's expecting it), it will error, but you can just press the link again within Helm to start the connection again.

*** Wix**

The site ID will be a UUID from the dashboard such as https://manage.wix.com/dashboard/<site-id>/general

For API keys

Go to Account settings, then select API Keys at the bottom left, 'Generate new API key' name it OFC_Helm or something similar, grant/check 'All Permissions' so we can get and update orders.

Generate Key, and at the end press the 'Copy Token' button, add the contents that was copied into the API Key field within Helm.

Where to get API keys, etc.

OnBuy: Listing->Imports and Integrations->Despatch Cloud

B&Q/Tesco/anything Mirakl: Top right icon, users/api keys somewhere there I can't 100% recall.

Woocommerce: Woocommerce->Rest API Keys->Create->Give Read/Write Permissions

Wix: Account Settings->API Keys

Along with our information in this document Helm offs guides for specific marketplaces

https://documentation.myhelm.app/en/help/collections/1084337-sales-channels

So if you find yourself lost, you can always check this, or contact Nathan or Paul at OFC.

Product Mapping

If you'd like to check how the products map (once the channel has been activated)

1. https://onlinefulfilmentcentre.myhelm.app/inventory/link
2. View Linking

Anything that hasn't automatically linked can be linked via the dropdown, this could be SKUs, missing inventory items, malformed SKUs, etc.

Here is for OFC information, you do not need to worry about anything from this point

Neuro

Ensure that Auto Hold Aged Orders (Auto Hold Orders in Helm) are disabled, otherwise orders can get 'stuck' On Hold within Neuro 'causing confusion and requiring manual intervention to get the orders into Helm.

Inventory Linking and Alternate SKUs

With marketplace integrations now in place (**and active**), we can match the inventory items from those integrations to the inventory we stock in the warehouse/have within Helm. A large amount of these will be 1:1 as the SKU on the marketplace will represent the SKU in Helm/Warehouse.

Many clients have alternative SKUs however, SKUs that are unique, but represent the same parent inventory item.

For these we need to match the alternate SKUs to the relevant SKUs within Helm.

One off SKUs (In Helm)

1. Settings->Link Inventory
2. The channel will tell you if there are unlinked SKUs, but you still may want to manual change linking even if all are 'matched'
3. Select the Client/Integration and View Linking
4. Scroll to a dropdown that's missing content (the DC SKU)
5. Match the Channel SKU (SKU within the integration), to whichever item it is within Helm from the dropdown

Bulk SKUs (Requires Neuro)

To do this we will be using **Neuro**. It should be a one-off when migrating/on-boarding a new client.

1. In Neuro select Channels
2. Find the client integration and click into **Actions**
3. Click **Products**
4. Press **Actions->Export All To CSV**
   This will generate the inventory list, and email the CSV to you
5. Update the content (as below)
6. Upload the new CSV in **Actions->Import**

Within the CSV generated the only things we will be looking at and changing are the:

sku and more importantly the **matched_sku**
sku is the SKU from the Integration, Shopify, etc
matched_sku is the SKU within helm

While updating the file we will only need to edit the matched_sku for those lines that it is missing from.
The CSV needs to have the same lines as when it was exported, so **do not delete or add any lines**.

This is done in a specific way
<client_id>~<helm_sku>

The client_id is the non-numeric id we have set for the Fulfilment Client within helm

Follow this with a tilde ~ (with no space) and follow the tilde with the SKU of the item within Helm e.g. **onlinefulfil~ofctest**

Hopefully we can match these with the export from mintsoft.

So the alt sku is what's from integration and the original sku should hopefully be on the export too, and we can just append <client_id>~ to it

Export From Mintsoft

Script

Will be working on a script that will take **neuroExport.csv** and **AltCodesReports.csv** loop through altCodes, store them, loop through neuro export, find any missing data and fill from altCodes if possible. If not possible will save a file called 'empty/missing' or the like with the SKUs that couldn't be matched.

Manual Linking in Helm

Settings->Link Inventory

Set Marketplace Integration to get Orders

In **Settings > Sales Channels**, after selecting the channel type (Amazon, etc.) then selecting the channel by clicking the first mini button to Edit.

Credentials

1. Check **active** so that is turns green
2. Check **Get Orders**

Stock Control

1. Check **auto sync stock** (if you want Helm to manage stock for the integration) so that it is also green

Shopify Specific

To get shopify to send emails to customers when order is despatched the

Notify Customer setting needs to be checked within **Credentials** tab

Misc

Misc

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.

Misc

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.

Misc

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**

Misc

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.

Contacts

Customer and Supplier Contacts. Ideal for creating orders for trade

Create a Customer

When an order comes in through a Marketplace integration a customer will be created for automatically.

For manual orders, B2B, etc. once a customer has been added to an order once, it doesn't get saved to make things easier, so this will need doing manually.

- Go to Contacts->Create Contact
- Select Customer, and fill in the name, email, and number
- Once redirected to the new page add in the remaining shipping and invoice details on the right
  You can also add the VAT numbers, etc. here too.
  These details will automatically save once you click into another input/box

With the contact created, they can now be selected for orders, or alternatively an order can be created via the Contact page at the top-right.

Details/Terms/Glossary

General details and descriptions of certain keywords, and things that may come up throughout using Helm

Item Types

Name	Description	CSV Value
Inventory	A normal item, be it a piece of clothing, poster, etc.	1
Group	A pseudo inventory item to group/bundle different inventory and quantities together. E.g. A StarterBundle group could have 2xRed T-shirts and 1xBlue T-shirt	3
Component	**Not Used** A piece of a larger item, or sold-as product. Like a tyre for a bike that we would build before sending to the customer.	2
Packaging	Boxes, letters, etc. Specific sizes and such, used for certain orders. Each box would get its own shipping label but be sent in the same order.	4
Auxiliary Packaging	Other packing materials, tape, bubble wrap, labels, etc.	5

Niche

Niche

ShopOnTV

For those of you selling on the teevee.

You will need to export the orders, then convert them to a Helm valid format, then finally upload to Helm.

https://wms.shopontv.co.uk/downloadorder/downloadorders

https://onlinefulfilmentcentre.myhelm.app/imports_exports/orders

You can run this script to convert the Orders from **ShopOn to Helm**

Python Code for Conversion

Run this from a blank directory that contains the export file (named order_export.csv).

Ensure your fulfilment client ID is the correct one (we will provide this for you upon request).

(TODO FUTURE) Or upload the CSV to this webpage, which will do this for you, and return the new CSV

Then at the end of each day, you'll need to import the orders.

To do this, first export the orders from Helm with the correct date-range (Today), and the Status (**Despatched**)

https://onlinefulfilmentsandbox.myhelm.app/imports_exports/orders

https://wms.shopontv.co.uk/downloadorder/downloadorders

Uploaded Shipped (CSV)

AS ABOVE, SCRIPT/URL THAT DOES THE CONVERSION

You can run this script to convert the Orders from **Helm to ShopOn**

https://files.ofc.anetwork.uk/index.php?p=scripts%2Fhelm_to_shoptv