Misc

- Filters
- Create Inventory Categories
- Creating a Purchase Order (ASN alternative)

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

Pretty self explanatory, this will filter the items on the page by the search string entered.

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.

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.

Creating a Purchase Order (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	
*Supplier Email	The email address of the supplier (can be own email)	
*Location ID	The location this item will be stocked to	
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	Needed?
Product Line Total Discount		0
Product Expected Delivery Date		?
PO Notes		
Payment Currency		**GBP**, etc
Product Notes		
Product Delivered Quantity		

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

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**
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.