Client Guides

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.

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.

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.

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**
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

Despatch Details

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

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

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.

Misc

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		

Name	Description	Expected Value
Product Delivered Quantity		
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.

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	-	2
Packaging	-	-
Auxiliary Packaging	-	-

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**