



# **SIGNING UP**

To get started, please visit orders.despatchcloud.app/register.php.

Enter your name, company name, phone number, and email address to register for an account. Then, click **Register**.

This will send an activation code to your email and the activation window below will pop-up on your screen.



Your account password has now been updated, and you can use this new password to log in to future sessions.



Insert your activation code and click **Submit**.

Your Orders account will then be installed and configured, and you will be prompted to set a password for your account.



## **GUIDED TOUR**

Once Orders is installed, you will be taken through a guided setup process. You can skip a step by clicking the **Skip** button on the pop-up window, or press the button next to it to continue.

Orders		
	Sales Channel Connection	
INNELS	To get you started, we've set you up with a manual sales channel. You can use this to take a peak around the system.	talled
•	If you're ready to set up your own sales channels, you can install your sales channels below.	1
AliExpress	Skip Install Channels	0
amazon Protect partner API	Autozon SP API	•
amazon Protection	AmazonVendor	0
<b>B-B</b> WAVE	B2B Wave	0
COMMERCE	Big Commerce	0

The menu on the left of your screen shows the various steps the system will take you through to set up your Orders account. The green tick next to each step shows when it has been completed.



When first accessing your Orders dashboard, users will be offered a quick walk-around of the system's essential features. Click Close to skip it, or Take the Tour to start.



Pop-up windows like the one below will show up on your dashboard explaining each feature at a time.



Click Next to move on to the next feature, or press **Back** to go over the previous feature again.

We recommend going over this tour as it will help users identify and locate the different features within the system. These will also be explained more in-depth throughout this guide.

Once the tour is over, you can click Back as many times as you need to go over any features you might have missed, or click **Done** to start using the system.



## **1. FIRST STEPS**



If you opted not to follow the setup tour, the next few steps will help you



# **2** UNDERSTANDING YOUR DASHBOARD

Orders.	Q Search Orders	요 ‡ Q →
Despatch Cloud	Warning: No default company details are set. You can set them Here	Shipment Totals
A Dashboard	Warning there is only the default sales channel installed! You can install more Here	for Tuesday 28th February 2023 No shipments generated today.
Send a Parcel		
Contacts	DRAFT ON HOLD DESPATCH READY PRINTED PACKING	
Manifesting	0 0	
Batch History Charts	DESPATCHED TODAY LABEL ERROR	
E Charts	Orders Despatched in the Last 30 Days	
	250	
	200	
	150	
	100	
	50	
	0	
powered by Despotch Cloud		Today's Orders
Last Login: 28 Feb 2023 14:20 PM V B D0 - 000.000.000.000		

Once you fully setup your system, the dashboard will start a populate with insights and statistics on your operation.

Your dashboard screen will also display an overview of your account's main features and functionalities, such as order management, shipping, and inventory, shown on the left.



#### **General Settings** This is where you find your settings. Q Search Orders **Q** →| **Orders** General Settings A Dashboard Û, Send a Parce 📜 Orders Default Shipping Rule Stock Contro Inventory Contacts Templates Manifesting 3 Batch History Θ C B 🗠 Charts Logo Templates Email Templates Printing Templates Packing Templates Integrations **.**... F Sales Channels Courier Integrations Printer Advanced vered by Despatch Cloud Last Login: 31 Mar 2023 16:31 PM V1 B1 D0 - 141.101.99.126 Ø 0 ×

General Settings is where you can configure Orders to your requirements. You'll find settings for users, printing, picking, packing, company details, etc. When setting up your Orders account, it would be best to visit some of these settings first, especially for company details, as this is required for label generation with couriers.

#### **Adding Your Company Address**

Adding a company address is essential as the system will automatically populate this information during order despatch. You must register at least one default company address. You can add more than one company address and select between the saved addresses while despatching orders.

#### Settings > Advanced > Address Manager

Orders.	Q Search Orders			& ⊕ <b>ঢ় Q</b> →
	General Settings			
Despatch Cloud DC DEMO	<b>x</b>	2	0	
Send a Parcel	-	•	•	
📜 Orders	Defaults	Users	Shipping Rules	
Inventory	Terrelation			
Contacts	Templates			
<ul> <li>Manifesting</li> <li>Batch History</li> </ul>	<b>C</b>	<b>C</b>		•
Charts	Packing Templates	Logo Templates	Email Templates	Printing Templates
	Integrations			
	Sales Channels	Courier Integrations	Printer	
	Advanced			
powered by Despatch Cloud	•		8	
Last Login: 28 Feb 2023 14:22 PM V B D0 - 000.000.000	Postcode Lookup	Address Manager	Engineer Menu	

#### A list of all your company addresses will show. Click the **Create Address** tab to add a new address.

ADDRESS LIST				Addresses Create A	ddress
Company Name	1st line of address	City	Postcode	Actions	
Despatch Cloud	Unit 76, Kelleythorpe Industrial Estate	Kelleythorpe	YO25 9DJ		
Settings Home			Set as def addres		Delete

#### Once you finish filling in your address information, scroll down to the bottom of the page and click the Create Address button to save it.

Orders.	Q Search Orders		<u>८</u> । ।
Despatch Cloud DC DEMO	ADDRESS LIST		Addresses Create Address
A Dashboard	Company Name:		
Send a Parcel	Line One:		
<b>Ⅲ</b> Inventory	Line Two:		
Contacts	City:		
Batch History	County:		
🗠 Charts	Country:	United Kingdom 🗸	
	ISO: (International Organization for Standardization 🗳)	GB	
	Postcode:	Enter a City Name, Street Name or Postcod	
	VAT Number: (Value-added Tax Identification Number 🛃)		
	Company Number:		
	GB EORI Number: (Economic Operators Registration and Identification number 🖄)		
powered by Despatch Cloud	XI EORI Number: (Economic Operators Registration and Identification number 🖄)		
Last Login: 01 Mar 2023 06:01 AM V B D0 - 000.000.000.000	EU EORI Number:		







#### Add a company logo

Upload your company's logo to use in your email and printing templates.

#### Go to Settings > Templates > Logo Templates

<b>C</b>	You will see a list of all default and existing logos.
Logo Templates	LOGO TEMPLATES
	File Formats: jpg/png
	Logo
6	orders-logo.png
	your_company.jpg
	+ Upload Logo Image Settings Home

Click on each file to see the contents of the image and use the red trash can icon to remove them.

- 2 Click **Upload Image** and select your file. We currently support JPG and PNG files for the use of this feature.
- **3** Your logo is now saved and ready to use.

#### **Defaults**

Manage default values to be used when information is missing for a product or package.

#### Settings > General Settings > Defaults

DEFAULTS Picklist are automatically		
Label Picklist Default Option:	Off 🗸	
Default HS Code:	0000	If an item is going to be shipped internationally and doesn't have a code in its configuration, this default value will be used in place.
Default Email Address:		
Default Phone Number:		The information you enter here will be used as your default company information on the packages. It will cover the missing information
Default Currency:	GBP	packages. It will cover the missing information on any package.
Default Package Value:	1.00	
Default Package Weight (Kg):	0.10	
Default Package Length (cm):	10	These fields will use any information you enter here if these details are left empty
Default Package Width (cm):	10	on the item inventory page.
Default Package Height (cm):	10	
Print Batch Limit (max 50):	50	Maximum numbers you can
Default S19 Courier API Template:	default	process at a time in a single batch
Save Changes Settings Home		The measurements are in kilograms and contimotors

# **Congratulations!**

You have finished setting up your company details and default information, and are now ready to move on to the next section.









# **2. ADDITIONAL INTEGRATIONS**

You can access your integrations page by scrolling through **Settings**.

egrations		
Sales Channels	Courier Integrations	Printer

**1** SALES CHANNELS INTEGRATIONS

#### **Install Sales Channels**

#### Settings > Sales Channels

LES CHANNELS			
	Name	Installed	
	Manual	1	Install Channel
ebay	еВау	This number indicates how many installed sales channels you	Install Channel
AliExpress	AliExpress	have for that particular platform.	Install a new sales channel
amazon From grather API	Amazon SP API	0	Install Channel
amazon ventor central	AmazonVendor	0	Install Channel
<b>B-B</b> WAVE	B2B Wave	0	Install Channel
digcommerce	Big Commerce	0	Install Channel
🗘 bluepark	BluePark	0	Install Channel
bol.com <sup>9</sup>	Bol.com	0	Install Channel

Here you will see a list of sales channel integrations that we offer. New integrations are constantly added to this list. You will see a brand logo to the left, with a number in the middle of the table.

#### Shopify Example



API Key:	The API Key is o through the pla	btain tform.
Auto Hold Orders:		
Download Products:		
Download Product Images:		
Download Product Dimensions:		
Download Product Customs Information:	Optional values purely fo preference. The import	or your runs
Use Order Prefix:	every 12 hours.	
Order Prefix:		
	Close Subm	nit

will need to go through an authentication process.

However, each channel will have its own process. Orders will guide you step-by-step so you can successfully integrate any of the channels from our list.

Click on the number under **Installed** to manage your channel's settings. Then click the icon in the **Active** column to activate or disable your sales channel. A loading spinner will show; this is your orders account communicating with our centralised sales channel server to enable/disable your sales channel.



Active:			Disabled 🗸	]			
Invoice/Packing Templ	ate:		4x6.default.invo 🗸	]			
Auto Print Invoice at Te	erminal:		Disabled 🗸	]			
Next >							
Back Channels H	ome						0
ALIEXPRESS DEMO					Version: 1		
Overview	Credentials	Brand		Despatch Emails			
Setup Guide & Basic Settings	Sales Channel API Credentials	DI di l'U Your Company Information	Your Commercial Invoice Details	Send Despatch Emails?			
Setup your Company Information for this	sales channel below. By default your Company	Information as set in General Settings will be used.					
Company Logo:		orders-logo.png			~		
		You can add your own company logo under the Logo Te	mplates settings menu.				
Company Return Address:		Please select an address			*		
<back next≯<="" td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td></back>							
					_		
Back Channels Home					Save Changes		
ALIEXPRESS DEMO					Version: 1		
Overview Setup Guide & Basic Settings	Credentials Sales Channel API Credentials	Brand Your Company Information	Commercial Inv. Details	Despatch Emails Send Despatch Emails?			ļ
		commercial Invoice Information as set in General Settings wi					
Commercial Invoice Template:	,	Default Settings 🗸					
Sender Address:		Please select an address			~		
< Back Next >							
Back Channels Home					Save Changes		
							1
ALIEXPRESS DEMO					Version: 1		
Overview	Credentials	Brand	Commercial Inv. Details	Despatch Emails			
Setup Guide & Basic Settings	Sales Channel API Credentials	Your Company Information	Your Commercial Invoice Details	Send Despatch Emails?			
Do you want Orders to send out an order de Note: Do NOT enable this option for an Ama		vn (if applicable)? If you do setup your Despatch Email for th	is sales channel below.				
Active:		Disabled V					
Email From Name:							
Email Subject:							
Email Template:		Please Select			~		
		You can add your own email template under the Email Te	mplates settings menu.				
Back     Save Changes							
Back Channels Home					Save Changes		



#### **Install Couriers**

#### Settings > Courier integrations

Here you will find a list of all the courier integrations we offer. New couriers are constantly added to this list. Click on the **Install Courier** button in front of your desired courier to start.

✓ Success: Courier has been	i successfully installed.		_	
	Name	Installed	_	
TEST COURIER	Test	1 Indiate Co		Add Credentials ×
<b>alt</b> logic	AllLogic	Number of accounts of you have installed with that	urier	Test Account
amazon	Amazon	courier	urier	No
OVERADE	АРС	0 Install CO	urier	Name
APG	APG Global	© Restal Co	urier	Test
				Company Name
arrowxl	Artow XI.	0 Install Co	urier	DC Demo
RSENDIA	Asendia	0 total Co	urier	Username (*)
Furne			_	username
				Password (*)
Each c	ourier installation	screen will have the <b>Test</b>		password
		ion is purely for testing, and	i+	
		he integration to work	n.	Close Save Changes
		he integration to work		
proper	ıy.			
			_	You must obtain the account details/API
Test Accou	nt			keys for other couriers through their
No			~	developer platforms to set up integrations with them.

The **Name** and the **Company Name** must be different from any other names and company names you have already set up for this courier.

Once the courier integration is created, you'll see the Installed number next to the courier logo increase. If you click on the number, you'll be able to manage the courier integration settings:

r			Enable/Disable a shipping service, and setup a collection time here.	
VOUR TEST ACCOUNTS		Control Panel & Basic Settin, Active: Collection Time:	gS Enabled V 07:00 PM O	General Service List Add Services
Select the service from the drop- down menu and click <b>Add Preset</b> .	TEST COUMER	TEST	General	Service List Add Services

elect Preset Service:	DHL Domestic Express 🗸
	DHL Domestic Express
	DHL Domestic Express 09:00
dd Manual Service	DHL Domestic Express 12:00
	DHL Express 09:00 (doc)
	DHL Express 09:00 (nondoc)
me:	DHL Express 10:30 (doc)
	DHL Express 10:30 (nondoc)
	DHL Express 12:00 (doc)
	DHL Express 12:00 (nondoc)
	DHL Express Economy Select (EU)
	DHL Express Economy Select (EU) Insuranced
	DHL Express Economy Select (nondoc)
	DHL Express Economy Select (nondoc) Insuranced
	DHL Express Worldwide (doc)
	DHL Express Worldwide (EU)
	DHL Express Worldwide (EU) Insuranced
	DHL Express Worldwide (nondoc)
	DHL Express Worldwide (nondoc) DDP
	DHL Express Worldwide (nondoc) DDP Insuranced
	DHL Express Worldwide (nondoc) Insuranced

Add Preset Service	
Select Preset Service: Test Label	Add Preset
Add Manual Service	
Name:	Add Service

You will need to do this for each service you require. If the service you are looking for isn't showing, you will need to add the details manually.

Fields will differ for every integration, depending on what the courier requires configured. However, if you hover over the boxes, it will tell you what it defaults to and what available options you can enter into them.

TEST COMMER TEST			General Service List	Add Services
Service ID Enabled Name/Courier		Config	Configure	
6 🕑 Test Label			Configure	
Settings Home				
	COURIER SETUP			
Through the <b>Service List</b> tab, you	Courier:		Test	-
can enable/disable and customise the existing services for the courier.	Local Tracking:		Disabled 🗸	
	Pieces & Dimensions:		Enabled ~	
	Save Option Cancel			
				rill be unique for ch courier.

Despatch Cloud





### **3. SHIPPING RULES**





When you create or add a courier service, a shipping rule is automatically generated but will not have any configured settings. You can create new rules or edit existing ones via the **Shipping Rules** tab under **General Settings**.

Once you are in this section, a list of all your shipping rules will appear for you to configure based on the courier services you added. You can enable/disable a rule by ticking the checkbox. If the checkbox is blue, the shipping rule is enabled.

FILTERS						~
Search:		Search by name or sales channel.				
		Apply Filters Clear Filters				
SHIPPING RULE	S (5 / 5)					Rules New Rule
Enabled	Priority	Name	Service	Sales Channel	Configure	Actions
	4	DPD Domestic Expresspak DI	DPD Domestic Expresspak DPD 10.30	All 🗸	Configure	
	3	DPD Domestic Freight Sunda	DPD Domestic Freight Sunday 🗸	All 🗸	Configure	
<b>2</b>	2	DPD Domestic Pallet Timed	DPD Domestic Pallet Timed 🗸 🗸	All 🗸	Configure	
<b>2</b>	1	DPD International Express Pa	DPD International Express Parcel by Air 🛛 🗸	All 🗸	Configure	
		sign priority levels to rules	Test Label 🗸	All 🗸	Configure	
Settings Hom	e fi h	rom 0-10, with 0 being the ighest priority, and 10 the rest. This will help automate		These refer to the shipp being applied to. Chan		

You can name your shipping rules whatever you like, however we do recommend that you keep it descriptive enough so you can easily recognise what rule it refers to.

You can choose to enable a shipping rule for all channels, a particular channel, or for manual orders only. However, you can only have one rule per shipping service at a time.

# **2** CONFIGURING A SHIPPING RULE

resolution whenever 2 or more conflicting rules are enabled.



To edit a shipping rule, simply click on the **Configure** button next to it. This will open the first configuration page. Here you can set limits on price, weight, dimensions and item number.

This is helpful, for example, if you have a service that charges significantly more for parcels that weigh above 5kg. Just set a maximum weight of 5kg for that service, and the service will not be selected for orders above that weight.

RULE CONFIGURATION - TEST LABEL Supported Countries							
Notes:							
		1					
Use price:	OFF 🗸	Min price:	0.00		Max price:	0.00	
Use weight:	OFF 🗸	Min weight:	0.000		Max weight:	0.000	
Use dimensions:	OFF 🗸	Min height:	0.00		Max height:	0.00	
		Min width:	0.00		Max width:	0.00	
		Min length:	0.00		Max length:	0.00	
Use inventory items count:	OFF 🗸	Min items:	0		Max items:	0	
	UT U		0			0	
Use postcode:	OFF 🗸	Excluded postcodes:					
		(Comma Separated)					1
		Included postcodes: (Comma Separated)					11
Use address line one keywords:	OFF 🗸	Excluded keywords: (Comma Separated)					1
		Included keywords:					
		(Comma Separated)					11
Use inventory shipping keywords:	OFF 🗸	Excluded inventory shipping keywo (Comma Separated)	ords:				li -
keywolds.							
		Included inventory shipping keywo (Comma Separated)	ords:				4
		Purchad advanced abbra for a surday					
Use channel shipping services:	OFF 🗸	Excluded channel shipping service: (Comma Separated)	5:				1
		Included channel shipping services (Comma Separated)					1
Save Option Return to lis	t						
		ON ~		in or (j) also	der for a feature need to enable nu, otherwise it v	e to work, yo it in t <u>he dro</u>	p-do <u>wn</u>
				men	u, otherwise it v	vill remain i	nactive.

Similarly, if you have a service that offers you a better price for smaller parcels, you can utilise the dimensions to fit the parameters of the desired service and set minimum dimensions against the services you want to avoid. This way you can have your preferred service automatically assigned to those deliveries every time.

Excluded postcodes: (Comma Separated)	 1
Included postcodes: (Comma Separated)	 4

You can also exclude certain addresses, based on postcode and address line one keywords, as well as inventory items and sales channel requested shipping service.

You can use the exclude field for any data you do not wish to be involved with your shipping rule. By doing this, you will be limiting the use of a certain shipping service for specific addresses, products and channels requested services.

Click on **Supported Countries** to manage which countries will be covered by the shipping rule you are configuring.

LE CONFIGURATION - TEST LABEL		Rules Supported Countrie
III Sala	Only United Kingdom	🕜 Royal Mail (Tracked & Signed Countries)
All EU	Only United States	Royal Mail (Tracked Countries)
All ROW		Royal Mail (Signed Countries)
		Royal Mail (Parcel Returns Countries)
Save Countries		
Afghanistan	Albania	🧭 Algeria
American Samoa	Andorra	Angola
Anguilla	Antarctica	Antigua and Barbuda
Argentina	Armenia	Aruba
Australia	Austria	Azerbaijan
Bahamas	Bahrain	Bangladesh
Barbados	Belarus	Belgium
Belize	Benin	Bermuda
Bhutan	Bollvia	Bosnia and Herzegovina
Botswana	Bouvet Island	Brazil
British Indian Ocean Territory	🕑 Brunei Darussalam	Bulgaria
Burkina Faso	Burundi	Cambodia
Cameroon	Canada	Cape Verde
Cayman Islands	Central African Republic	Chad
Chile	China	🕑 Christmas Island
Cocos (Keeling) Islands	Colombia	Comoros
Congo	Cook Islands	🕑 Costa Rica
Cote D'Ivoire	Croatia	Cuba
Cyprus Cyprus	Czechia	Oemocratic Republic of the Congo
Oenmark	Djibouti	O Dominica
Operation Dominican Republic	Ecuador	Egypt

Make sure all the countries you select are supported by the shipping service you are configuring to avoid system errors.

 $\sim$ 

You will notice there is a particular section for Royal Mail. These are presets to help Royal Mail users, and you should only select these when they apply.

- Royal Mail (Tracked Countries)
   Royal Mail (Signed Countries)
  - Royal Mail (Parcel Returns Countries)

# **3** CREATING A SHIPPING RULE



FILTERS		~	
Search:	Search by name or sales channel.           Apply Filters         Clear Filters		
SHIPPING RULES (4 / 4)	Rules	New Rule	
Create a new shipping rule.			
Name:		and cho	name to your rule, ose an option from of pre-configured
Service:	DPD Domestic Expresspak DPD 10.30	ship	oping services.
	Create Option Click here to save. This will bring you back to the main menu, where you will find the new rule has been added to your list. The new rule will be enabled by default, but you must configure it first, so it works properly.		

To do that, just follow the same steps as before to configure a rule, and you are set to go!







# **4. CONTACTS**

Contacts are where you can keep a database of your customers. You can quickly search customers through company name, customer name, or email address while despatching orders.

# 

Through **Filters**, you can search or sort customers. You can also select multiple contacts and delete them at once.

<b>Q</b> Sea	rch Orders			<u>م</u> ک	<b>₽ Q →</b>
	rch by product code, name, location Name 🕑 Email			Search	Filters Saved Filters
CONTA	CTS LIST (1 / 1)				
Create	Contacts Import/Export			Last Upd	ated (Recent-Past) 🗸
	Invoice Address	Shipping Address	Email	Phone	Actions
	Despatch Cloud Ltd Despatch Cloud Unit 76 Kelleythorpe Industrial Estate, Warfield Rd Kelleythorpe Driffield YO25 9DJ	Despatch Cloud Ltd Despatch Cloud Unit 76 Kelleythorpe Industrial Estate, Warfield Rd Kelleythorpe Driffield YO25 9DJ	hello@despatchcloud.com	44 1377 455180	

INVOICE ADDRESS			SHIPPING ADDRESS	
Despatch Cloud Ltd			Despatch Cloud Ltd	
Despatch Cloud			Despatch Cloud	
Unit 76			Unit 76	
Kelleythorpe Industrial Estate, V	Varfield Rd		Kelleythorpe Industrial Estate, Warfield Rd	
Kelleythorpe			Kelleythorpe	
Driffield			Driffield	
United Kingdom	~		United Kingdom 🗸	
GB	GB		GB	
Y025 9DJ			Y025 9DJ	
COMPANY INFO				
Email:	hello@despatchcloud.com			
	44 1377 455180			
lioraer				
in Orders	VAT Number			
ormation.				
_				
			ave your customer's details and go	
🗲 Back 🔜 Quick Shi	ip Quick Order	📻 bac	k to your contact list simply press	
		the	Back button at the bottom of the	
		<u> </u>		
	Despatch Cloud Ltd Despatch Cloud Unit 76 Kelleythorpe Industrial Estate, M Kelleythorpe Driffield United Kingdom GB V025 90J COMPANY INFO Email:	Despatch Cloud Ltd   Despatch Cloud   Unit 76   Kelleythorpe   Driffield   United Kingdom   Off   Y025 9D   COMPANY IMFO   Email:   Lorder   Order   Orderson   VXT Number	Despatch Cloud Ltd   Despatch Cloud   Unit 76   Kelleythorpe   Orffield   United Kingdom   G   Y025 SPJ   COMPANY INFO   Email:   Nellogdespatchcloud.com   41377 455100   Vit Number   Vit Number   To S bace	



Click on the **Create Contact** button on top of your contact list to start.

CONTA	CTS LIST (1 / 1)					
Create	Contacts Import/Export			Last	Jpdated (Recent-Past) 🗸	
	Invoice Address	Shipping Address	Email	Phone	Actions	
	Despatch Cloud Ltd Despatch Cloud Unit 76 Kelleythorpe Industrial Estate, Warfield Rd Kelleythorpe Driffield YO25 9DJ	Despatch Cloud Ltd Despatch Cloud Unit 76 Kelleythorpe Industrial Estate, Warfield Rd Kelleythorpe Driffield YO25 9DJ	hello@despatchcloud.com	44 1377 455180	C	
		This will bring you to th	is page.			
CREA	TE CONTACT					
Creat	e a new contact.					
Contact Name: Add the name and email address of your contact and click <b>Create Contact</b>						
Emai	l Address:					
Cr	eate Contact					

This will bring you to the configuration page below, where you can add your contact's shipping address, invoice address, company info, and any notes you may want to add.

SHIPPING ADDRESS

Despatch Cloud Ltd		Despatch Cloud Ltd
Despatch Cloud		Despatch Cloud
Unit 76		Unit 76
Kelleythorpe Industrial Estate, Warfield Rd		Kelleythorpe Industrial Estate, Warfield Rd
Kelleythorpe		Kelleythorpe
Driffield		Driffield
United Kingdom	·	United Kingdom 🗸
GB		GB
YO25 9DJ		Y025 9DJ
COMPANY INFO		
Email:	hello@despatchcloud.com	
Phone:	44 1377 455180	
Phone (Alternative):		
VAT Number:	VAT Number	
NOTES		
Click here to save. 1	This	
will bring you to th contacts main pag	ie de.	
🗲 Back 📑 Quick Ship	Quick Order	
		li li

# **3** CONTACTS IMPORT/EXPORT



Click on the **Create Contact** button on top of your contact list to start.

This will bring you to the page below, where you can import a list of your customers and save it on the system, or you can export them to a CSV file.

CONTACTS IMPORT
You can upload any csv file and use our mapping tool to map your column fields to Orders fields.          Select file       Select a file.
Upload & Process File
CONTACTS EXPORT

Contact Id	contact_id
Shipping Name Company	shipping_name_company
Shipping Name	shipping_name
Shipping Address Line One	shipping_address_line_one
Shipping Address Line Two	shipping_address_line_two
Shipping Address City	shipping_address_city
Shipping Address County	shipping_address_county
Shipping Address Country	shipping_address_country
Shipping Address Postcode	shipping_address_postcode
Shipping Address Iso	shipping_address_iso
Invoice Name Company	invoice_name_company
Invoice Name	invoice_name
Invoice Address Line One	invoice_address_line_one
Invoice Address Line Two	invoice_address_line_two
Invoice Address City	invoice_address_city
Invoice Address County	invoice_address_county
Invoice Address Country	invoice_address_country
Invoice Address Postcode	invoice_address_postcode
Invoice Address Iso	invoice_address_iso
Email	email
Phone One	phone_one
Phone Two	phone_two
Notes	notes

Once you upload a file, the system will ask you to map the data before submitting it. For example, you will be asked to select a column from the CSV file for each one of the fields. If you do not have the data for a specific row, you can leave it blank by selecting the first option ---.

Click **Submit Mapped Data** once you're done to upload your contacts.







## **5. MANIFESTING**

If the courier(s) that you book shipments with require manifests, you can generate them via the **Manifesting** section in the left-hand panel of your Orders Dashboard.

Orders.	MANI	FESTING				Summary Manifest Hist
		Courier	Name	# Shipments	Manifest	
Despatch Cloud DC DEMO		🕎 dpd	DPD DPD	0	ା ହିଛି Run End Of Day	]
Send a Parcel	-		Test			
Orders     Inventory		TEST COURIER	Test	2	ାର୍ଥି Run End Of Day	Only if the courier
Contacts				_		supports a manifest, you will have an activ button
■ Manifesting	]	If you want to gene				
<ul> <li>Batch History</li> <li>Charts</li> </ul>		Royal Mail Click & D do so from within th platform provided	ne Click & Drop	ust		

Click the **Run End Of Day** button to generate your manifest. You will be redirected to the PDF for your manifest. If you have already generated a manifest and wish to re-print it, click the **Manifest History** tab at the top-right of the page.







# **6. ORDER MANAGEMENT**



#### **Via Sales Channels**

Once you connect your sales channels, the system automatically retrieves orders through them. The orders could appear within minutes; however, they could take up to an hour. The system will periodically check for each connected sales channel for paid and unshipped orders. The statuses of the imported orders will vary on the sales channel.

#### **Manual Input**



# **2** PROCESSING ORDERS / LABEL PRINTING

#### Send a Parcel



BOXES				Add Box	SALES CHANNEL	Assign orders you added manually to a specific sales channel.
					(Default) Manual	channei.
Packaging Type	Content Weight (Kg)	Length (cm) Width	n (cm) Height		SHIPPING DETAILS	~
	▶         0 items         0.10           ght(Kg)         Length(cm)         Width(cm)         Height(cr)           0.750         35.0         25.0         2.5	10 10	Add packa Customise or choose of	ges to your order. parcel dimension packaging prese m our list.	Edit Details SHIPPING SERVICE Select Service	Couriers are automatically assigned based on your shipping rules. Select a different shipping provider here. Print a packing Slip along with your label. Create Single Shipment
					Company Name Customer Name Ensall Address Phone Reference	YO259FQ           YO25 YFQ Box Seats Statistics LM XM and Works, Kakythorge Industral Box ORYFELD           YO25 YFQ Seats 5.8 Site Services LM 51, Kakythorge Industral Estate DVFYELD           YO25 YFQ Seats 5.8 Site Services LM 51, Kakythorge Industral Estate ORYFELD           YO25 YFQ Seats 5.4 Reference Industry Estate DVFYELD           YO25 YFQ Seats 5.4 Reference Industry Estate DVFYELD           YO25 YFQ Seats 5.9 Seats 1.2 Reference Industry Estate DVFYELD           YO25 YFQ Seats 5.9 Seats 1.2 Reference Industry Estate DVFYELD           YO25 YFQ Seats 5.9 S UK LK VIX 72, Reference Industry Estates DVFYELD           YO25 YFQ Seats 5.9 S UK LK VIX 72, Reference Industry Estates DVFYELD           YO25 YFQ Seats 5.9 S UK LK VIX 72, Reference Industry Estates DVFYELD
			Custom	ner		×
	Packing Template stal Order Weight. W		Custo	mer Information	Sh	ipping Address
information wi	Il now auto-populat	e the field	Comp	any Name	Er	nter a City Name, Street Name or Postcode
whenever you	choose that packing	g preset.	Custor	ner Name	st	nipping Address Line One
				Address	SI	nipping Address Line Two
	ch is only valid for U		Phone			nipping Address City
will be deducte	essful postcode look ed from your accour ables' page to buy n	nt. Access				Inited Kingdom  GB
			Find Cu:	tomer		Save Changes

#### **Batch Process**

th your labels

Batching allows you to book and print multiple labels at once, along with a commercial invoice and packing slips. You can also process multiple batches at once. **Batch process up to 50 orders at once with your standard Orders account or upgrade to Plus for 150 orders of batching capacity.** 

To access this feature, head over to your orders panel. Here you'll find all your orders waiting for despatch. Select the orders you want to process and click the **Batch Process** button at the bottom of the screen.

С	orders.										Filters Saved
				er id, reference code, stock code nel Alt ID 🕜 DC Code 💈		Postcode 🧭 Product Coe	de				Search Filters
	espatch Cloud C DEMO	ORDERS									2 / 2 records
*	Dashboard		Channel	/Export Orders Order Details	Delivery	On Time/Late	# Item(s)	Shipping	Notes	Gross/Weight	e Received (Recent-Past)
	Send a Parcel		Manual	1677741918-37 02 Mar 2023 07:25 AM DC-1677741918-453	No Data 🛟 YO25 9FQ	N/A	1 SGL	Test Label		15.00 GBP 20.000 KG	
Ì	Orders		Manual	1677738390-37 02 Mar 2023 06:26 AM DC-1677738390-143	No Data 🏶 YO25 9FQ	N/A	_1SGL	Test Label		15.00 GBP 1.000 KG	despatch orders
i≡	Where you can find Batch Process										rint invoice.
<b></b>	Contacts										
	Manifesting	Print	Orders	Batch Process Merge Or	Select Bulk Action		Apply Action				
5	Batch History										
[~"	Charts										
					(i)	Set We below	<b>eight</b> , tł will be s to pa	ne weig set to	ght vo 5. The		_
PROC	This button will send all the orders to be booked with their shipping services.	BULK ASSIG	N OPTION:	5							×
	Process Orders Cancel If you enable this, it	Set Shipp	ing Service	2		Select Shipping S	ervice	~		Set Serv	ice
	Create picking lists with labels. Will print a picking list after each label.	Set Packa	ging:			Select Packaging		~		Set Packa	ging

2 ORDERS IN BATCH								This is where you set the values for every selected	
Order Numb	er	Destination	# Items	Weight	Value	Shipping Service	# Packages		Packaging
C 1677741918- DC-16777419 BAT-1677742	18-453	No Data <b>#</b> YO25 9FQ	1	5.000	15.00 (GBP)	Test Label	- 1 +	)	
C 1677738390- DC-16777383 BAT-1677742	90-143	No Data 🛟 YO25 9FQ	1	5.000	15.00 (GBP)	Test Label	- 1 +	)	

0.00

0.00

Set Weight

Set Value

Weight:

Value:

Once you click the **Process Orders** button, you will be redirected to a separate page to view all your batches. If the batch is completed, it will show with a green check mark. If the batch is completed, but there was at least one error, an amber mark will appear. If the batch fails, a red cross will show.

✓ Your batch is now process	ing as BAT-1677742929. View Batch					
BATCH HISTORY						
Batch	Batch Date/Time	Batch Status	Label Count	Integrated Label Count	Downloaded	Actions
BAT-1677742929	02 Mar 2023 07:42 AM	Satch completed successfully	2/2	0 / 2	±	د 🛓 🕥
		iococo will dopond d			Here you c download y	an reset a batch or your batch labels in a PDF.

How long a batch takes to process will depend on how many labels there are in the batch, and how fast those can be retrieved from the courier.

#### **Cancelling & Resetting**

Here you will learn how to reset an individual order from a batch, or reset the whole batch altogether. The system will also attempt to cancel the label with the courier, provided that the courier allows label cancellations via its API. Cancelling the labels with the courier also applies if you reset the whole batch.

#### **1** Go to **Batch History**.

Δ

Orders.	<b>Q</b> Search Orders						& ⊕ Ħ Q →
Despatch Cloud	BATCH HISTORY						
Dashboard	Batch	Batch Date/Time	Batch Status	Label Count	Integrated Label Count	Downloaded	Actions
Send a Parcel Orders	BAT-1677742929	02 Mar 2023 07:42 AM	Batch completed successfully	2/2	0/2	*	C 1 0
Inventory							
Contacts							
Manifesting Batch History							
Charts							
powered by Despotch Cloud							
st Login: 01 Mar 2023 13:31 PM V B D0 - 000.000.000.000							

#### 2 Click on the batch you want to manage. A list like the one below will appear.

BATCH BAT-1663051879				Batch Histor	y		
Print Ref	Status	Response		•••		wnloaded	Where you reset the whole batch
DC-1662991396- 746 DC-1662989602- 513 Total Labels: 2   Errors: 0	•	View Label	Here to reset an individual order.	View Shipment View Shipment		View B	atch Labels (PDF) atch Labels (PDF) 4 Integrated Labels (S19) 4 Integrated Labels (S17) Batch
View Shipments	View Order: 2R 6082-228	K-6155					
Reference: DC-166574	6082-228			View Label			
Shipping Service: Test Shipping Value: £96.98 Label Created: 14 Oct : Tracking Link: https:// Tracking Number: 000 Customer Comments:	8 2022 12:15 PM / <mark>despatchcloud</mark> /000000	.com/					

Order #1677741918-37   DC-10	677741918-453							02 Mar 2023 07:25 AM	
Products						Customer			
Image Name	0	ty Unit Pri	ce Discoun	t Price		Contact Details			
Demo Product - [001]		1 15.00		15.00		Billing Address			
				(Cost 0.00 Paid 0.00 Paid 15.00		Despatch Cloud Ltd Unit 76, Kelleythorpe Warfield Road, Kelley DRIFFIELD United Kingdom			
Customer Order Comments						YO25 9FQ GB			
The customer did not leave order comments for this o	rder.					Shipping Address Despatch Cloud Ltd			
Add Note						Unit 76, Kelleythorpe Warfield Road, Kelley DRIFFIELD United Kingdom			
					+	YO25 9FQ GB			
					Notes Logs	Payment Status			
There are no notes.						Payment Currency:		GBP	
There are no staff notes.						Return			
						Shipping Status			
						Requested: Calculated: Shipping Weight:		Test Label	
Back     Despatch Details     De	spatched V								
<b>5</b> Order #1677741918-37   general	DC-1677741918-453						TRACKING UPDATES - #000	1000000	02 Mar 2023 07:42
Date Label Processed:	02 Mar 2023 07:4						There are currently no track	king updates for this tracking	number.
Date Order Despatched:	02 Mar 2023 07:	42 AM							
Packed By: Total Parcels:	System								
Shipping Service:	Test Label								
Shipping Tracking Code(s):	000000000								
Tracking Site Links: Total Pick Count:	https://despatcl	hcloud.com/							
SHIPMENT HISTORY									
REF (ID)	Created	Service	Weight	Postcode	ISO Tracking Code	Cancelled			
OC-1677741918-453 (246)	02 Mar 2023 07:42 AM	Test Label	5.000	YO259FQ	GB 00000000	NO			

	This will reset the individual order from the batch and will also attempt to cancel the label with the courier that the label was booked with.
Kew All Orders     View Label     Cancel Label & Reset 0	Order Cancel Label & Reprocess Order

If a shipment has failed within your batch, you can ship that order individually.

Print Ref	Status	Response			•••	
DC-1662991396- 746	0	View Label		View Sh	ipment	
DC-1662989602- 513 Total Labels: Click order	where to go to the rs page directly.	View Label		View Sh	ipment	
		<b>←</b> Back	Print	Ship	Printed	~
			Print your order's invoice.	Go to Send a Parcel. Details of the order auto-populate.		

At the bottom of the page your menu will look like this.

# **Orders** Quick Start Guide

**3** ALL ORDERS

**Orders** 

**Despatch Cloud** 

Dashboard

Send a Parcel

Orders

~

The volume of orders you can process per month depends on your package. Upgrade to Orders Plus for unlimited orders.

Use filters to navigate your orders more easily. Just tick the checkbox to select a filter category, write down your information in the search bar and click "Search".

					to reveal the I filters below
Search by name, email, order id, reference	e code, stock code, postcode, etc			Search	Filters
🕑 Order REF 🛛 Channel Alt ID 💡	🖉 DC Code 🔄 Name 💙 Email 🕜 Postcode 🔗 Product Code				
Order Date Range:	02 January 2023 to 02 March 2023	Despatched Date Range:	to		
Order Status:		Sales Channel:			
Shipping Method Requested:		Shipping Method Calculated:			
Tracking Status:		On Time/Late Status:			
Shipping Destination:		Туре:			
Order Tag:		Item Qty:			
	Apply Filters Clear Filters			Sa	ave Active Filters







You'll notice that the bottom menu becomes visible upon selecting one or more orders. This menu allows you to print labels, export orders, and create invoices for the selected orders.



#### Orders > Import/Export Orders



You can import orders into Orders using a CSV file. A CSV file template can be found under the Upload & Process File button when you go to import orders page. It can give you an idea about how to organize your data before importing them to Orders. There is also the option to import a CSV file from Amazon or eBay, and use their respective CSV column mapping.

ORDER IMPORTS - MAPPING

The left column is the sections in Orders.

Right column represents the data pulled from the CSV file you just uploaded

View or delete your mapping templates.

Mapping Name

ORDER IMPORTS

		io you just aproducta.	
Channel Alt Id		~	Mapping
Shipping Name Company	Shipping Name Company	~	1d
Shipping Name	Shipping Name	~	10
Shipping First Name		~	
Shipping Last Name		~	View or revert yo
Shipping Address Line One	Shipping Address Line One	~	
Shipping Address Line Two	Shipping Address Line Two	~	ORDER IMPO
Shipping Address City	Shipping Address City	~	
Shipping Address County	Shipping Address County	~	
Shipping Address Country	Shipping Address Country	~	
Shipping Address Postcode	Shipping Address Postcode	~	
Shipping Address Iso	Shipping Address ISO	~	Success: Your
Import Name			
Give this import a name if you want to save this mapping configuration.	Mapping Name		A le
Submit Mapped Data			
		If you need to import or	ders

16	default mapping	
r revert yo	our imports, and modify your	settings to ensure future imports are accurate and complete.
ORDER IMP	ORTS	Import Today's Imports Mappings
		Rollback Selected Imports
	Тад	Import Date/Time
_	1666270683	20 Oct 2022 13:58 PM
	1666270683	
	1666270683	

Success	: Your u	pload ha	s been si	iccessful	ly rollec	lback.



If you don't have data for a given field, you can leave it blank by selecting the first "---" option in the corresponding drop-down menu.

again, the system will automatically fill out the fields using the saved mapping.







# **7. INVENTORY**



Your inventory is where can store your item data. This is useful for generating shipments as your orders can inherit the item weights and dimensions, automating the order despatch process. Storing inventory data is also crucial for international shipments, as you can store commodity (HS) codes and item customs descriptions. You can store up to 1,000 inventory items with your standard Orders account or upgrade to Orders Plus for unlimited products.

Find a list of your inventory here. Orders. Orders does not support complex product relationships **Despatch Cloud** such as groups/kits/bundles and components. Dashboard Any special characters used in Send a Parcel your inventory may appear disconfigured in your text box. Orders Inventory Contacts Filters Saved Search by product code, name, location Filters Product Code 🛛 Name 🖓 Location 🔗 Barcode INVENTORY LIST (1 / 1) Last Updated (Recent-Past) 🗸 🚥 Product Code Location Weight (Kg) Actions Image Name Demo Product 001 📋 5.000

There are 2 main options for adding and updating your inventory with Orders– manually, or via CSV Import. Alternatively, subscribe to Orders Plus and access our stock control feature, which will automatically download inventory from your integrated sales channels and update it as orders are despatched. It will also give you access to stock warnings and logs, as well as inventory linking, for an enhanced stock control experience.



To edit an existing product, access your inventory list and click the item's **View Inventory** button. This will bring you to the configuration page below. Head over to our Orders documentation for a list of all the relevant glossary terms.

#### Inventory> View Inventory

≢∎						Add vour invento	orv deatils	s according to the fields be
	ITEM: TEST-SKU					,	,	
	Summary Information					DATE ADDED		
	TEST-SKU					16 Jun 2022 21:40 PM		
	Stock Information							Adjust Stock
	STOCK LEVEL					STOCK WARN LEVEL		
	26 SYNC STOCK					5 DEDUCT STOCK		
	Yes				~	Yes		~
	General Information							
	NAME							
	Product Name							
	WEIGHT (KG) 0.000		HEIGHT (CM)			WIDTH (CM)		LENGTH (CM)
	Advanced Information			HS CODE			SHIPPING SERVICE	
				535657			DPD Domestic	Freight Next Day 🗸
	BARCODE					LOCATION		This is the default, go-to shipp
Takes in a text input Ind converts it into (	a							service for the product
product's barcode	RICE					RETAIL PRICE		
	0.00					0.00		
	Product Image							+ Upload Image
	IMAGE							
					P	3		
	Linked Sales Channels							
	THERE ARE CURRENTLY NO SALES CHANNEL	S LINKED TO THIS ITEM.						
								Return
								Click here to save and return to the main page.

#### Inventory> Create Inventory

	oduct code, name, location		Create Inventor	/	
Product (	Code 🕜 Name 🕜 Location				
			Create a new inventory item.		
INVENTORY LIS	T (1 / 1)		Product Name:		
Create Inven	tory Import/Export Inventory				
-			Product Code:		
3	Product Code	In			
	001 🛑	E	Create Inventory		

**3** This will bring you to the same configuration page where you edit your product details.

4 Tap Return at the bottom of the page to save your the changes, and you're done!



One of the best ways to download inventory data in bulk is via a CSV file. To do this, first access your Inventory page.

#### Inventory> Import/Export Inventory.

	let Code, name, location 2	Click Select file, then Upload & Process.
INVENTORY LIST (1	IN	VENTORY IMPORT
Create Inventory	Product Code In 001	You can upload any csv file and use our mapping tool to map your
	3 This wil bring you to the mapping	Select file Select a file. Upload & Process File g page, where you can link the data fields in Orders ng ones on your CSV file (right column).
	INVENTORY IMPORT - MAPPING	ng ones on your CSV file (right column).
	Product Code	Product Code 🗸
	Name	Name 🗸
	Description	Description 🗸
	Item Barcode	Item Barcode 🗸
	Product Weight	Choose your preferred
	Product Height	option for each section from the dropdown mer
	Product Width	V If you do not have the do
	Product Length	for a specific row, you control leave it blank by selecting the first option,
	Location	Location 🗸
	Country Of Origin	Country of Origin 🗸
	Hscode	~
	Cost Price	Cost Price 🗸
	Retail Price	Retail Price 🗸
	Shipping Service	Shipping Service 🗸
	Stock Level	Stock Level 🗸
	Stock Warn Level	Stock Warn Level 🗸
	Come Charles	Course Chanala and

**4** Click on **Submit Data** when you're done to upload your items.



Search by product	code, name, location	
Product Code	🕑 Name 🕑 Locatio	n 🕑
INVENTORY LIST (1 /	1)	
Create Inventory	Import/Export Inventor	
	Product Code	h
	001 📙	[

You can also easily export your current inventory into a CSV file through the same export/import page.

#### Inventory> Import/Export

To download your current inventory in CSV (comma-separated-values) format click here.



Even if your inventory is empty, you can still dowload our CSV file to use as a preset.







Orders.	Q Search Orders			ደ ‡ <b>ଟ Q</b> →
Sofia SOFIA TESTING 2	General Settings			
Dashboard     Send a Parcel	•	<b>e</b>	0	<b></b>
Orders	Defaults	Users	Shipping Rules	Stock Control
Contacts	Templates			
Batch History Charts	•	٢	•	8
	Packing Templates	Logo Templates	Email Templates	Printing Templates
powered by Despatch Cloud	Integrations			
Last Login: 08 Mar 2023 10:54 AM V B D0 - 141.101.99.108				

With Orders Plus, you will get access our stock control feature, meaning inventory will start to populate from your sales channels and via items from the immediate inbound orders. You can enable this feature under the General Settings tab.

Stock Control will automatically update stock levels on the sales channel(s) as orders come in. Inventory will also populate from your sales channels and via items in the immediate inbound orders.

Alert Log will have the system keep track of all stock warnings for each of the products in your inventory.

STOCK CONTROL		
Stock Control Active:	Yes	~
Alert Log:	Yes	~
Send Low Stock Email:	Yes	~
Save Changes Settings Home		

Send Low Stock Email will enable the system to send notification emails henever a certain product falls below their pre-configured minimum stock level.

Once these are enabled, 2 new buttons will appear in your inventory page for stock adjustments and logs, as well as a new column for stock levels.





- Go to Inventory.
- 2 Click the 🗮 button next to the product you want to edit.
- 3 You will be brought to the "Stock Action" screen where you can increase, decrease or set the quantity of the items directly. You also need to fill in the "Action Note" section, where you can briefly explain your reasoning.

Set stock action for qty value on product co	ode TEST-SKU
Amount	
Increase Quantity	0
Decrease Quantity	0
Set Quantity	۲
Action Note	
Keep in mind any stock	Cancel + Save



Inventory linking allows you to match the current inventory you have on Orders with the inventory you have on a sales channel.

If the SKU of your products is the same in the sales channels and the Orders, they'll be linked together automatically. But if not, you'll have to do it manually through here.

#### Go to Inventory.

Create	Inventory Import/E	xport Inventory	Inventory Linking Stock Warn	ings Stock Alert Logs		Last Updated	I (Recent-Past) 🗸
	Product Code	Image	Name	Location	Weight (Kg)	Stock	Actions
	Recep123 📙	i	Recep123 WOOCOMMERCE TEST		0.000	-14 Sync: Yes	
	Test204802 📋		Test204802a WOOCOMMERCE TEST		0.000	-2 Sync: Yes	
	basak1 📙		basak1 WOOCOMMERCE TEST		0.000	-5 Sync: Yes	₹.

2 Click the

Inventory Linking

#### button to manage your linking.

REFINE INVENTORY		
Search:	Search by channel SKU	
Linked Status	All 🗸	Search
ETSY INVENTORY		
Return to Sales Cha	annel Linking	
1		
Title	Channel SKU	Orders SKU
SKU 1	demo product 1	SKU 1 (demo product 1)
SKU 2	demo product 2	SKU 2 (demo product 2)
SKU 3	demo product 3	SKU 3 (demo product 3)
SKU 4	demo product 4	SKU 4 (demo product 4)
SKU 5	demo product 5	SKU 5 (demo product 5)
1		

You can use the 'Refine Inventory' feature to filter inventory by link status (either linked or unlinked) and sales channel SKU.

3 Use the dropdown menus on the Orders SKU column to link your Orders inventory to the their respective product matches on your sales channel. 'Title' refers the to the name of your product on the sales channel.

4 Click the Return to Sales Channel Linking Utton to save your changes.

5 A success message will appear on the top right side of the screen letting you know the product has been linked.

## **3** STOCK WARNINGS

You can set minimum stock levels for each of your inventory items, and have the system send an email notification whenever a certain product falls below the level you've set.



To do this simply go to Inventory, and click the edit button in front of the product you want to set a minimum stock level for.

Scroll down the items configuration page.

Q Search Orders				<u> </u>
Barcode: (1)	SmallCloudPoster	SKU: (1)	2	STOCK DETAILS
EXPORT				Stock
Customs Description:				24
				LOCATION
HS Code:		Country of Origin:		A2
WEIGHTS AND DIMENS	IONS			SHIPPING OVERRIDE
Weight 0.000	kg Height 0 cm	Width 0	cm Length 0 cm	
STOCK CONTROL				LINKED SALES CHANNELS
Sync Stock:	No 🗸 Deduct Stock:	Yes 🗸	Stock Warn 5 Level:	There is no linked sales channel for this inventory.
←Back	Adjust Stock			
'Stock Warn	ter putting on Level' to the alue to save.			

Now, if click the **Stock Warnings** button in your main inventory page, you can find a list of all your inventory that has fallen below their stock warning level.

STOCK WARNINGS						~
Product Code	Name	Image	Stock Level	Stock Log	Location	
Recep123	Recep123	1	-14 Sync: Yes	Stock Log		
1						

You can access stock logs and edit your inventory from here.



You can access your Stock Alert Logs via your main Inventory page.

Click the Stock Alert Logs button. This will bring you to the page below, where you can see all the changes in stock made by the system and the sales channels with their related timestamp.

Here you can see all the changes in stock made by the system and the sales channels with their related timestamp.

ALERT LOGS	~
Date	Note
10 Aug 2022 11:07 AM	Chapi Product Bulk Create (COFFE123) - Done
10 Aug 2022 11:07 AM	Chapi Product Bulk Create (computeritems) - Done
10 Aug 2022 11:07 AM	Chapi Product Bulk Create (3423523523523520) - Done
10 Aug 2022 11:07 AM	Chapi Product Bulk Create (3432532525) - Done
10 Aug 2022 11:07 AM	Chapi Product Bulk Create (123142532523) - Done
10 Aug 2022 10:39 AM	Update Stock Sync (qymn-78018093) - Chapi update done
10 Aug 2022 10:36 AM	Update Stock Sync (qymn-78018093) - Chapi update done

≪<456789



With Orders Plus, you gain access to Despatch Cloud's REST API. This will allow you to perform 'RESTful' operations such as reading, modifying, adding or deleting data from your Despatch Cloud account.

You can find this feature under the Advanced tab in Settings:



Here you can enable this functionality by choosing the "Yes" option from the dropdown menu. Then, click "Save Changes". This will generate an API Key for your personal use. You will also find a link for all the relevant documentation.

✓ API settings updated successfully.		
API SETTINGS		ΑΡΙ
API Settings		
API documentation can be found using the following link: https://documentation.can be found using the found using the following link: https://documentation.can be found using the found using the found using the found	mentation.despatch.cloud/overview.html	
API Active:	Yes 🗸	
API Key:		
(When activated an API key will be generated)		
Save Changes Settings Home		



With Orders Plus you also get access to unlimited:

- Users
- Inventory Items (Standard Package 1,000 Items vs. Orders Plus Unlimited)

You can also batch 150 orders at a time instead of 50. To learn more about how you can benefit from this feature, head over to the <u>Batch Process</u> section of this infoguide.







## **8. UPDATES**

If a system update is available, the message below will show on top of your screen. Just click on it, and the update will start.

System Update: A system update is available, to install this update please Cli

Click Here

It will take up to 30 seconds for the update to complete once initialized, and it is advised to be done when no other user is logged into your system but yourself. If you experience any issues with Orders, please ensure you're on the latest update before creating a support ticket.







# **9. ADVANCED SETTINGS**

To use your Orders system to its full potential, please visit the settings below. These features are not critical for the well-functioning of the system, but they will help enhance user experience and customise the system to your needs even further.

#### **User Setup**

#### Settings > General Settings > Users

<b>2</b>			
Users			
		You'll fi	nd a list of all your existing users here.
USERS			Users Invite User
Name	Email	Level	

To create a new user, click on the Invite User button on the top right-hand corner of the screen, which will take you to the user configuration page.



Once you've completed the necessary fields, click the Invite User button at the bottom to send the invitation to the new user. You will receive a success message on the top right side of the screen.

 $\times$  Success User has been sent an invitation email.



The new user will receive an email with instructions on how to set up a password for their account and start using it immediately.

#### **Configuring Silent Printing**

Orders allows you to print multiple labels at once via silent printing. This means that, when you click **Print**, the option printer setting windows will not pop up, allowing you to print directly. To use silent printing in our system, you will need to install a small print utility on your computer that is connected to your printer.

#### Download QZ tray for free at <u>https://qz.io/download/</u>. 1

	For a detail below:	ed guide on how to install QZ Tray, refer to the documentation
$\frown$	Windows	<u>documentation.despatchcloud.com/books/printing-labels/</u> page/qz-tray-windows
(j)	macOS	<u>documentation.despatchcloud.com/books/printing-labels/</u> page/qz-tray-osx
	Linux	<u>documentation.despatchcloud.com/books/printing-labels/</u> page/qz-tray-debian-ubuntu

#### Go to Settings > Integrations > Printer

Printer	

This will bring you to the printer configuration page.

PRINTER SETTINGS			
Print Settings			
QZ Tray Active:	No	3	Make sure that <b>QZ Tray</b> Active is set to <b>Yes</b> .
Use Order ID on Labels: If set to "Yes", Orders will send the Order Id instead of the Print Ref as the Shipment/Label Reference. This may cause label creation errors due to length restrictions imposed by certain couriers.	No		lf not, change this to <b>Yes</b> and click the <b>Save</b> <b>Changes</b> button.
Send Order ID's as Reference 2:	No		
Reference Prefix:	DC		
Printer Name:	• • • • •	4	On <b>Printer Name</b> will now be a drop-down
Save Changes Settings Home			menu where you will select your label printed
			connected to QZ Tray. Once you're done, click the <b>Save Changes</b> button.

#### **Email Templates**

Using email templates, you can customise the look and feel of your despatch notifications, and even assign different email templates for each sales channel. This is ideal for customers who operate multiple brands or companies.

## Settings > Templates > Email Templates **Email Templates** Here you'll find a list of all your templates. You can easily edit, clone or delete a template by clicking the different icons on the right end side of the screen. EMAIL TEMPLATES Templates **Create Template** Template Name Default Settings Home

This will bring you to the template editing page. & ☆ ♬ Q → **Q** Se **Orders** CREATE EMAIL TEMPLATE Email Templates Create Templat Use Advanced Editor Template Name: A Dashboard Send a Parcel 📜 Orders Inventory Despatch Cloud  $( \bullet )$ Basic Contacts Manifesting AĮ 3 Batch History **Example Heading** 🗠 Charts Example text  $( \bullet )$ <

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If you're not confident in your HTML and CSS Î skills, we recommend that you duplicate the Default template and edit it.

You will notice certain information appears in {BRACKETS}. These are variables that are populated with the appropriate values in the email.

Powered by Despatch Clo

You can also build your email template from scratch using our smart template builder by clicking on Create Template.

#### **Packing Templates**

Packing templates refer to the types of packaging (usually boxes and envelopes) you ship your orders in. Create packing templates or customise our existing ones, and save time inserting the package dimensions each time you're despatching orders.

#### Go to Settings > Templates > Packing Templates

Packing Templates	PACKING TEM	PLATES					Templates Crea
	Sort Order	Template Name	Length	Width	Height	Weight	Opt.
	0	Large Letter 100g	35.	25.	2.5	0.1	(Total Order Weight)
			cm	cm	cm	kg	
	1	Large Letter 250g	35.	25.	2.5	0.2	
			cm	cm	cm	kg	
	2	Large Letter 500g	35.	25.	2.5	0.5	
			cm	cm	cm	kg	
	3	Large Letter 750g	35.	25.	2.5	0.7	
			cm	cm	cm	kg	
	4	Small Packet	45.	35.	16.	1.0	
			cm	cm	cm	kg	
	5	Medium Packet	61.	46.	46.	2.0	
			cm	cm	cm	kg	
	6	Box A	40.	40.	30.	15.	
		20111	cm	cm	cm	kg	
	7	Box B	10(	10.	10.	15.	
		DOAD	cm	cm	cm	kg	
	8	Shoebox	33.	19.	10.	2.0	
	0	SHOEDOX	cm	cm	cm	kg	
	9	Small Bag	24.	33.	5.0	1.0	
	3	Small Dag	cm	cm	cm	kg	
	10	Medium Bag	30.	42.	5.0	2.0	
	10	Medium bag	cm	cm	cm	kg	
		Lavre Par	39.	48.	10.	5.0	
	11	Large Bag	cm	cm	cm	kg	
	10	VI Pag	49.	54.	15.	10.	
	12	XL Bag	cm	cm	cm	kg	

To create a new packing template, click on **Create Template**. 2

The following page will appear. Add a name and your desired measurements.

PACKING TEMPLATES		Templates	Create Template
Packaging Name:			
Sort Order:		The lower the number, the higher the entry will be listed on the drop-down list while despatching an order.	
Packaging Length (cm):		list while despatching an order.	
Packaging Width (cm):			
Packaging Height (cm):			
Packaging Weight (Kg):			
Apply "Packaging Weight" as total order weight?	Yes 🗸		
Create Packaging		Enable this to override the weight of the order to the value added on the template. This will show on the Opt. column of your template list.	



Click on **Create Packaging** to save.

You can also customise any of the existing presets, or delete a template from the main template page.

0	Large Letter 100g	35.	25.	2.5	0.1	(Total Order Weight) 🗸 🗸	-
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This is how your packing templates will show when you're despatching your order:

BOXES						Add Box
Packaging Type	Content	Weight (Kg)	Length (cm)	Width (cm)	Height (cm)	
	✓ 0 items	0.10	10	10	10	
Large Letter 100g Large Letter 250g Large Letter 500g Small Packet Medium Packet Box A Box B Shoebox Small Bag Medium Bag Large Bag XL Bag						

#### **Print Templates**

In Orders, you can upload new invoice layouts, and use them when printing receipts and shipping labels. Please refer to the smarty documentation page, to learn how you can use this tool to create your custom templates.

#### Settings > Templates > Print Templates

	B				
Printi	ng Templates				
	PRINT TEMPLATES	Here you'll find a list of all your ten	nplates		
	Note: You can edit .tpl files as you would .htm	http://www.smarty.net) for all print file templates. All template files must end with the .invoice.tpl for invoice template files and .picklist.tpl for picklist template files. tml files using a HTML editor such as Notepad++, TextWrangler, Dreamweaver, etc e sales channels settings page. To assign a picklist template please go to the general settings page.			
	File	Delete th			
	4x6.default.invoice.tpl a4.default.commercial_invoice.tpl				
	a4.default.embed.tpl				
	a4.default.invoice.tpl a4.embed.invoice.tpl				
	+ Upload File Settings Home				
Upload you temp	ır custom late				

#### Consumables

You can find the consumables section by clicking the basket icon on the top right corner of the screen.





