

Order Folders

Overview

The Order Folders allow you to create customisable folders with unique icons, colours, and names. This feature enables you to organise and assign orders to specific folders, enhancing your ability to filter and manage orders effectively. You can list orders by the folders they are assigned to, making it easier to locate and process them. Additionally, you can merge separate existing folders, combining their orders into a single folder without losing any data, further simplifying your order management workflow.

This document provides detailed instructions on creating and managing order folders.

Effective Order Folder Usage: Assign unique names, icons, and colours to your folders to enhance organisation and quick identification. Utilise the "Merge Folders" option to consolidate orders and improve your workflow.

Accessing the Order Folders Page

To access the order folders page, click on the settings icon on the left-hand side of the screen. Then, select the "Order Folders" option, as shown in the highlighted picture below.



Creating New Order Folders

To create a new folder, follow the steps below:

1. **Click the "Create Folder" Button:** From the bottom right corner of the page, click the "Create Folder" button.
2. **Fill in the Details:** In the popup window that opens, provide the following details and then click the "Create Folder" button in the popup window to finalise the process:
 - **Name:** Assign the folder a unique and descriptive name. This will help you remember and understand its purpose when you assign orders to it later.
 - **Icon:** Choose a unique icon for the folder from 30 available options. Icons help you quickly recognise folders.
 - **Colour:** Assign a colour to the folder for recognition and identification. You can choose from 15 available colours.



Managing Order Folders

Data will be populated on the Order Folders page once you create and add orders to your folders. To learn how to manage your folders, follow the description below:

1. Fields Explained on the Order Folders Page:

- **Folder Name:** This column displays the names of the folders.
- **Last Order Added:** This column displays the date of the most recent order added to the folder. If you hover over it, you can view the full date with the hour, minutes, and seconds.
- **Order Qty in Folder:** This column displays the total number of orders added to the folders.
- **Status:** This column displays the status of the folder. If it's "Active," the folder can be used. If it's set to "Inactive," you won't be able to add any orders to this folder. You can change the status by clicking the status box of each folder.
- **Actions:** This button expands to display the actions you can take for each folder individually:
 - **Duplicate:** This option creates a duplicate folder with its configuration. The status of a duplicated folder will be inactive, so if you plan on utilising it right away, remember to change its status to active.
 - **Delete:** This option allows you to delete the folder.

2. Bulk Actions:

- You can also click the checkbox icon and select more than one folder to process them together using the bulk menu. The bulk menu actions are explained below:
 - **Duplicate:** This option allows you to duplicate more than one folder at a time.
 - **Merge Folders:** If you choose multiple folders, you can merge them. You will be prompted to set a new name, icon, and colour for the merged folder. Once the process is complete, the system will combine all the orders in the selected folders into one folder.
 - **Delete:** You can delete multiple folders at a time using this option.

