



STORE CLOSE

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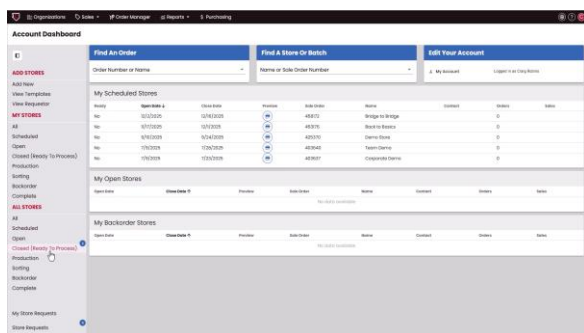
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LOCATE YOUR CLOSED STORE

Once a store's close date has passed, Chipply automatically moves it into a queue so you know exactly what needs attention next.

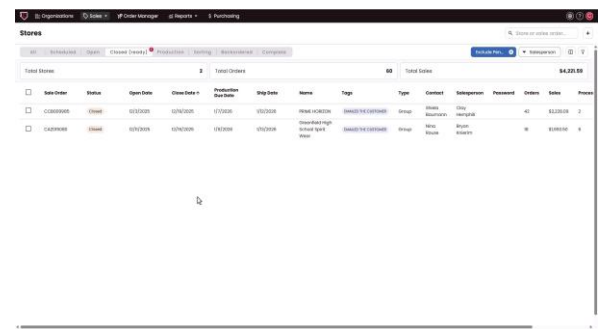
Catalog stores work a little differently — they can stay open all year, with orders collecting into **batches** (for example, every order that comes in during a given week). When a batch closes, it lands in this same queue, and everything in this guide happens inside that batch while the parent store stays open and keeps aggregating data across every batch.



Account Dashboard — Closed (Ready To Process) folder

From your **Account Dashboard**, look at the left-hand menu under **My Stores**. Any store that has closed and is ready to be processed will appear in the **Closed (Ready To Process)** folder.

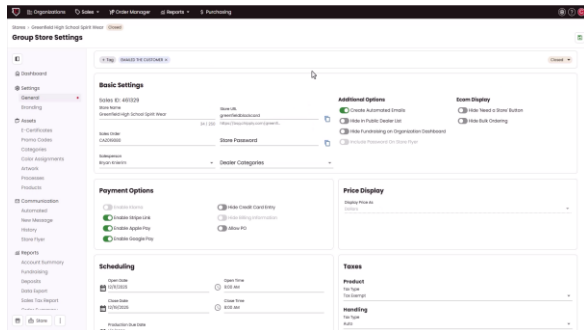
Click into that folder and you'll see every store waiting on you, along with its **close date**, **production due date**, and **total orders/sales**. Pick the store you want to start working on.



Stores list filtered to Closed

TIP Not ready to process a small batch yet? Hover over the store in **Closed (Ready To Process)** and choose **Next Batch** to roll those orders into the next scheduled batch instead.

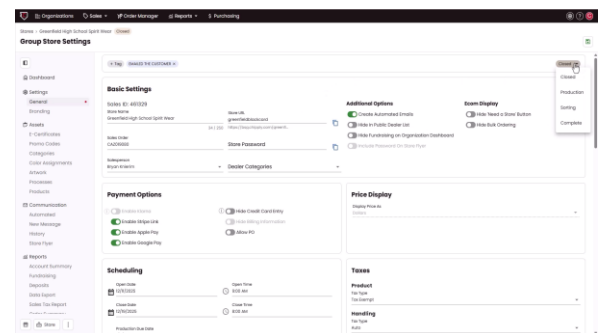
SET THE STATUS TO PRODUCTION



Group Store Settings — General tab

Clicking into the store takes you straight to its **Settings** page. Inside, the batch behaves like a mini store of its own, with **Reports & Fulfillment** now available in the left-hand menu.

One of the first things to do is change the store's status from **Closed** to **Production**, then hit **Save**.

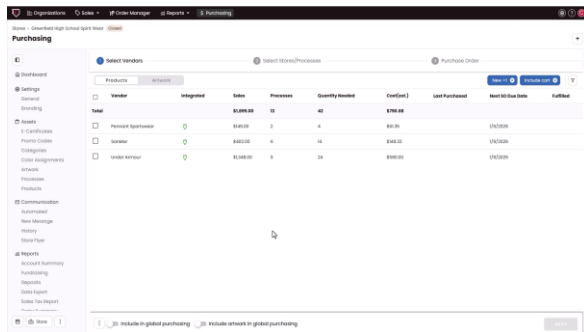


Status dropdown: Close, Production, Sorting, Complete

TIP Changing the status does two things: it clears the store out of your Closed folder so your dashboard stays organized, and it lets anyone else on your account know the store is actively being worked on — not forgotten.

GATHER YOUR PURCHASING DOCUMENT

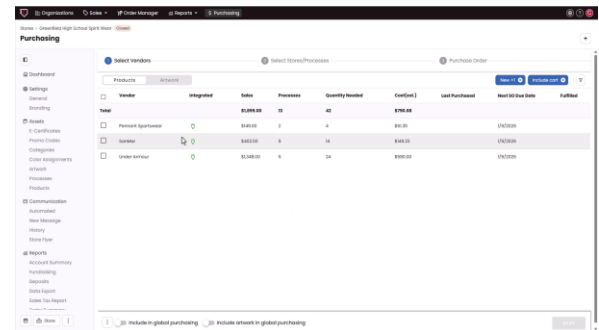
Whether or not you have vendor integrations set up, the **Purchasing** tab is the fastest way to see everything you need to order in one place.



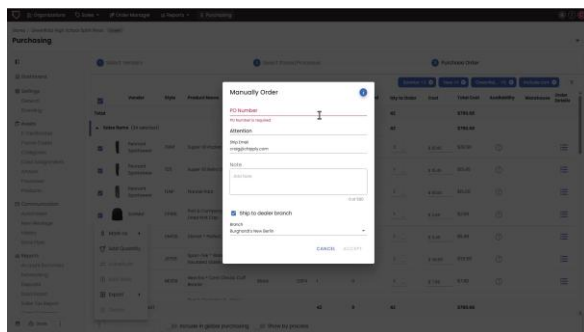
Purchasing — Select Vendors

Scroll to the bottom of the left-hand menu and click **Purchasing**. This lists every vendor that has orders on the store.

If you don't have an integration set up and just want **one clean document**, select all the vendors, then click **Next** twice. The middle screen lets you purchase decoration processes separately — most of the time you'll just click through it.



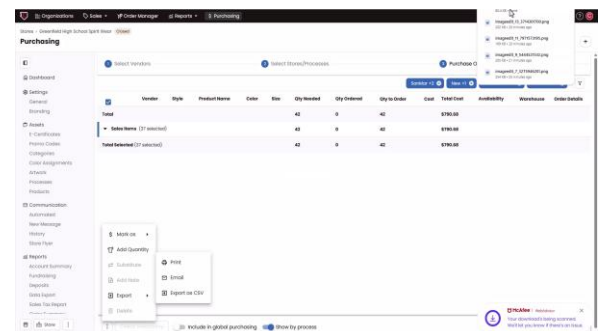
Select all vendors, then Next



Enter a PO number to reference later

Under **More Actions**, choose **Mark As Purchased**. You'll be prompted for a **PO number** you can reference later inside your Chipply account.

Chipply generates a clean purchase-order document broken out by **vendor**, so you know exactly what to order from each one. Marking items as purchased removes them from the Purchasing list, so what's left is always what still needs to be ordered.



Purchase order detail, split by vendor and process

TIP The document is also grouped by process. Items getting the same decoration (like full-front prints) can be ordered together and sent straight to the same print or embroidery department, saving your receiving team a sorting step later.

- **Name it clearly:** something like "Bishop Kearney 6/19 batch" — a clean, consistent naming convention (store + date) makes every download easy to find later.
- **It's archived for you:** every purchase order you generate is saved under Fulfillment → Purchasing in the top black bar, giving you a reprintable paper trail of everything you've ordered.

ORDER DIRECTLY THROUGH CHIPPLY

If you're integrated with a vendor, you can place the order right from inside the platform instead of building a manual document.



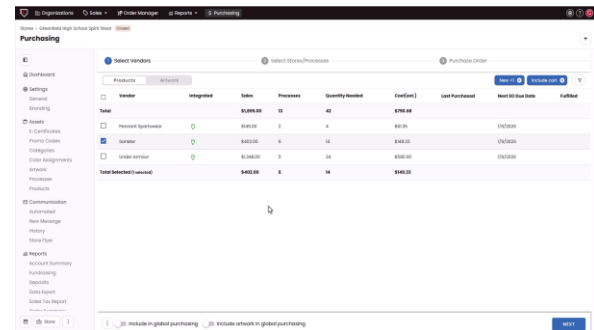
ITEM	PRODUCT NAME	COLOR	SIZE	QTY	ITEM COST	TOTAL	SALES ORDER	WH	UPC
784P	Super 10 Pocket Sweatshirt	Black/BLACK	XL	1	\$15.45	\$15.45	CAD2-1000	001	72723244895
VENDOR SUMMARY									
PC130	Quattro B Pocket T-Shirt	Black	L	1	\$5.45	\$5.45	CAD2-1000	001	0019126570000
PC135	Port & Company B-Long Sleeve Tee	White	M	1	\$3.13	\$3.13	CAD2-1000	001	0019126536034
PC178	Port & Company Adult Crew Neck Long Sleeve	Dark Heather Grey	M	1	\$7.70	\$7.70	CAD2-1000	001	0019126532413
PC181	Port & Company B-Crew Neck Fleece	Dark Green	XL	1	\$11.00	\$11.00	CAD2-1000	001	0019126516455
		White	XL	1	\$11.00	\$11.00	CAD2-1000	001	0019126531043
PC135	Port & Company B-Crew Neck T-Shirt	Dark Green	M	1	\$3.13	\$3.13	CAD2-1000	001	0019126536034
PC135L	Port & Company B-Long Sleeve Crew Neck Dark Green	Dark Green	L	1	\$5.45	\$5.45	CAD2-1000	001	0019126536034
PC178	Port & Company Adult Crew Neck Long Sleeve	Dark Heather Grey	L	1	\$7.70	\$7.70	CAD2-1000	001	0019126516310
		White	XL	1	\$7.70	\$7.70	CAD2-1000	001	0019126516310
JCT55	Super 10 B Sweatshirt	Black	L	1	\$39.99	\$39.99	CAD2-1000	001	0019126511300
ST100	Super 10 B Sweatshirt	Black	M	1	\$17.99	\$17.99	CAD2-1000	001	0019126504242
		Black	XL	1	\$17.99	\$17.99	CAD2-1000	001	0019126504242
HC308	New Era B Cap	Black	OSFA 1	1	\$7.99	\$7.99	CAD2-1000	001	0019126513070
CP160	Port & Company B-Plaid Long Sleeve	Black	OSFA 1	1	\$2.00	\$2.00	CAD2-1000	001	0019126536034

Items grouped by process before ordering

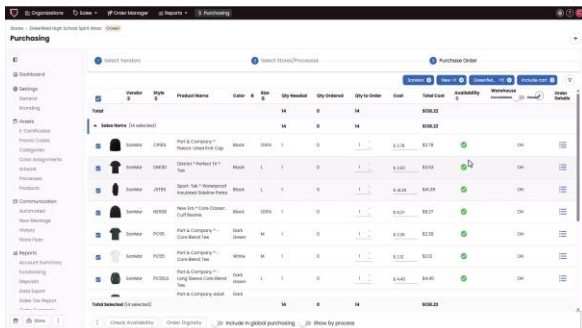
To connect a vendor integration, just let your **Chippily Account Executive** know. They'll send you an integration email spelling out the address to use and where to add it — you only need to connect the vendors you actually use.

TIP Before ordering, decide how you want items grouped. Ordering full-front pieces together (or embroidery pieces together) means everything for one process arrives in the same box — your receiving team won't have to re-sort it.

Select **one vendor at a time** and click **Next**. This second stage is where you group items for ordering — by minimums, by print program, or however fits your process.



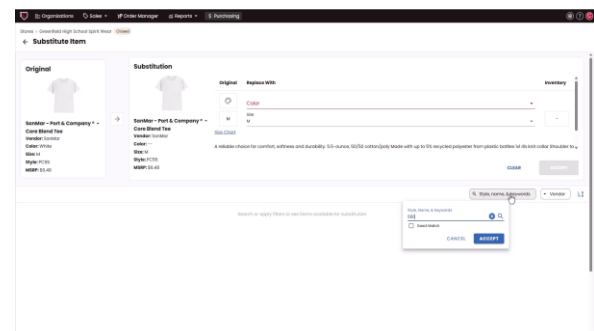
Select one vendor at a time, then Next



Check Availability — green checkmark means in stock

Enter a PO number, then click **Check Availability**. It pings the vendor's warehouse directly: a green checkmark means everything below it is in stock, while a red triangle flags an item that needs a substitution. From there, **Order Digitally** places the order for you — no manually adding items to a cart, and no key-in errors.

If something is out of stock, select the item, choose **More Actions > Substitute**, and pick the replacement style or color. Always substitute using the **vendor's own SKU** for that style.



Substitute Item — swap style, color, or vendor

TIP Substituting updates the item everywhere it appears behind the scenes — work orders, packing slips, and sorting sheets all reflect the change automatically.

Global Purchasing

Global Purchasing combines items across small stores and batches so you can clear a vendor's free-shipping minimum (say, \$200) instead of paying shipping on every individual order.

TIP Toggle Global Purchasing on inside Purchasing for a single store or batch to send its items up to Purchasing under Fulfillment in the top black bar. To have every future batch flow up automatically, toggle it on at the Catalog Parent level instead — and skip it for any batch that already clears the minimum on its own.

GENERATE YOUR WORK ORDERS

The **Work Order Report** tells production exactly what to make, so the job gets done quickly and correctly.

Totals		Amount Collected	
Product Price	\$1,500.00	Amount	\$0.00
Shipping	\$20.00	Credit Card	\$1,480.00
Total	\$1,520.00	Total	\$1,480.00

Work Order Report — account summary

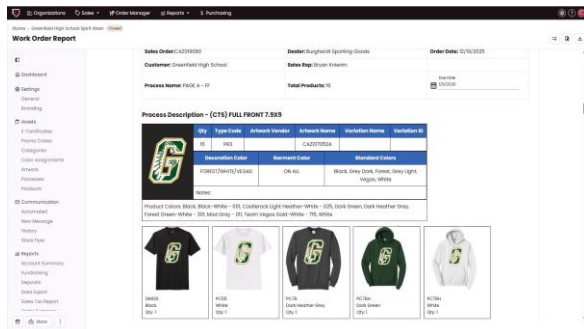
The first page is always the **Account Summary** — a quick overview of the store's performance, including any fundraising or e-certificates used.

Below that, products are grouped into **process pages** — items decorated the same way (same hoop, thread count, artwork) are piled together, with quantities and sizes listed out. Right after the products, you'll see any **work order notes** (like "8.5 in" or "10,000 thread count") along with color variations.

Qty	Color	Price	Total
1	Black	\$10.00	\$10.00
1	White	\$10.00	\$10.00

Products grouped by process (e.g. Page A — Full Front)

TIP Page labels like "Page A" or "Page B" are just an internal naming convention — you can title your processes however makes sense for your shop.

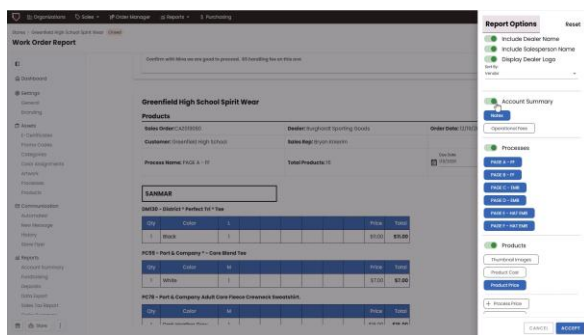


Artwork and mockup for each process

Each process page includes the **artwork** being used and a **mockup** of the finished product, with any name/number personalization called out at the end of that process, so production can see exactly what they're making.

TIP Personalization-heavy jobs (name & number) run smoother when the store is set up as a group store — you configure it once instead of chasing down one-off requests.

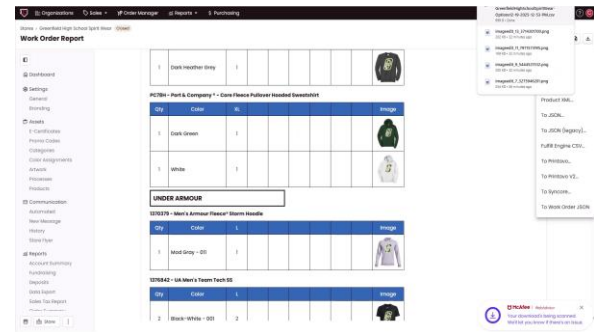
CUSTOMIZE YOUR WORK ORDER REPORT



Report Options — toggle sections on or off

Click the **Report Options** (check/X) icon to tailor the report to your process. You can toggle off the **account summary** and **product price** so production only sees what they need, and switch product images to **Thumbnail Images** for a more compact layout.

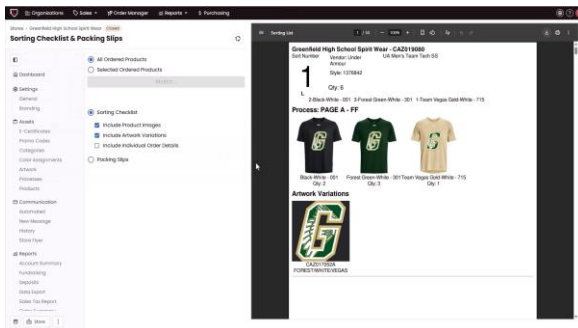
You can also toggle individual processes on or off, then **Export** as a PDF (best for seeing artwork and placement) for each department – print, embroidery, and so on – so each team only gets their portion.



Export options, including a personalization CSV

TIP For personalized items, export the **CSV file** instead. It gives whoever is cutting or digitizing names an editable list to copy straight from, instead of retyping names by hand.

SORT AND PACK YOUR ORDERS

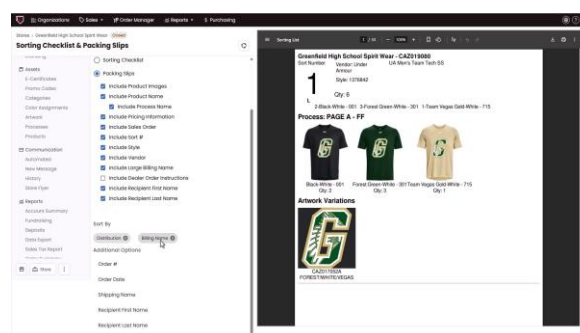


Sorting checklist, organized into numbered piles

Generate a **Sorting Checklist** to organize finished product into numbered piles (each pile gets its own **Sort #**) as it comes off the production line. Unchecking **Include Individual Order Details** before you generate saves paper – that detail all lives on the packing slips instead.

TIP Keep items with the same product but different decorations in separate piles. It removes any chance of grabbing the right shirt with the wrong design on it.

Next, generate your **packing slips**. Each one walks you order-by-order, calling out the **Sort #** of every pile to pull for that order — for example, "grab Sort #2 (XL black) + Sort #4 (S sky blue)." Shipping and recipient info sit at the top of each slip.



Packing slips, sorted by order number

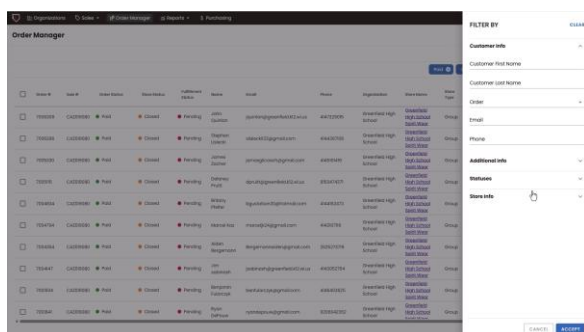
TIP Packing slips default to grouping by Distribution Method (Ship to Customer, Deliver to Org), then alphabetically. If you ship through a service like ShipStation, sort by **order number** instead so slips match the order your labels print in.

Adding a sort question

You can also sort packing slips by a checkout question — like a team's age group — so a coach's whole box comes out already organized.

TIP To add one, go to **Branding** → **Pages** → **(+) Additional Info Fields**. A **Group Lists** field works best, with team names set as the selections and the field marked required — that makes it the easiest option to sort packing slips by.

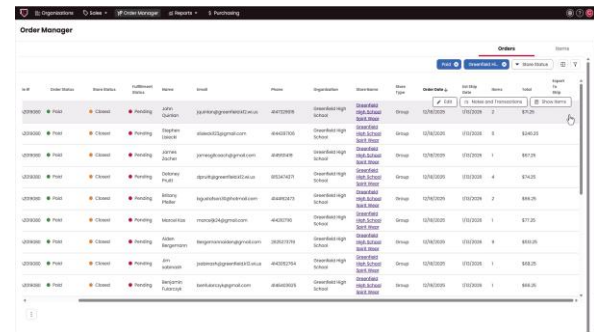
SHIP YOUR ORDERS



Order Manager — filter by shipping type

In **Order Manager**, use the filter tool to isolate orders that selected **shipping** at checkout — you don't need labels for org delivery or pickup orders.

Select those orders and send them to your shipping integration in bulk. Once a label and tracking number are created, the tracking number is sent back and shows up right in Order Manager.



Order ID	Order Status	Order Date	Order Total	Order Weight	Order Type	Order Items
00000001	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000002	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000003	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000004	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000005	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000006	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000007	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000008	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000009	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle
00000010	Open	12/12/2019	\$12.00	1.00	Standard	1x 12oz Bottle

Order Manager — shipping status at a glance

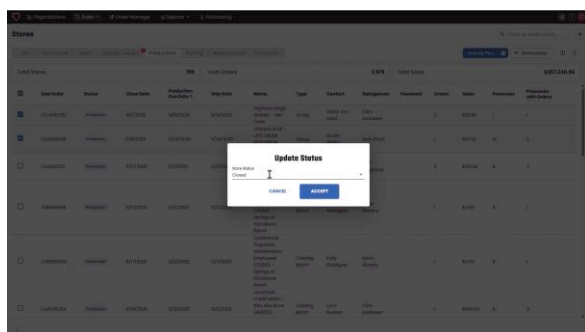
TIP Not on ShipStation? Go to Data Export in the closed store or batch and download Shipping Results — it includes each shipping address plus the weight in ounces, which is handy for a bulk upload to your own shipper (like XPS).

NOTIFY CUSTOMERS

Chippily doesn't automatically email customers when their order ships — since some items in a batch may be ready before others, sending that notice is left in your hands.

- **Go to Communication:** inside the closed store or batch, click Communication → New Message.
- **Select recipients:** choose your Order Recipients — one at a time if you're pasting in individual tracking numbers.
- **Use merge fields:** click a merge field like Customer First Name or Store Name to insert it — don't type the brackets yourself.
- **Set your Reply-To:** point Reply-To Recipients at your own email, since the default sender shows as no-reply.
- **Confirm it sent:** after sending, check History → Details to confirm exactly what went out and to whom.

MARK THE STORE COMPLETE



Update multiple store statuses to Complete at once

As work wraps up, move the store through its remaining statuses — **Production** → **Sorting** → **Complete** — from its Settings page, or update several stores at once from your **Production** folder by checking their boxes and updating the status in bulk. If something's on backorder, mark it **Back-Ordered** so it stays on your radar.

TIP Completed stores don't disappear. If you want to reuse the same URL for a similar event later, just copy the group store and clear out the old orders — an empty Closed (Ready To Process) folder is your sign that everything's caught up.

TIP Have a more detailed situation come up? Reach out to your AM or sales rep, or email teamchipply@chipply.com — we're happy to walk through it with you.

HANDY REMINDERS

- **Abandoned orders:** if a customer starts checkout but never clicks Place Order, Chipply automatically sends them a reminder email. It's normal and nothing to worry about — unless every order on a store shows abandoned.
- **Name your files clearly:** include the store name and date on every download (POs, work orders, packing slips). It makes everything easy to find later.
- **Check the Help page:** the ? icon in the top right of Chipply has full articles on store-close and batch processing.
- **Need support?:** email teamchipply@chipply.com first with the topic in the subject line, and CC your account executive or account manager — it routes straight to the support queue for a fast answer.