Your business and OrderLemon

In this English version of our user guide, you can find everything you need to know about onboarding your shop, adding and editing products and so much more!

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Intro

Welcome to OrderLemon!

Welcome to OrderLemon! We are thrilled to have you here!

We know you are eager to start this exciting journey, and thus, without further ado, here is the OrderLemon Onboarding user guide!

Other languages

If you are looking for this documentation in other languages, you can find the correct links here:

Dutch

Nederlandstalige documentatie (still under construction)

Onboarding

Everything about the onboarding of a company in OrderLemon.
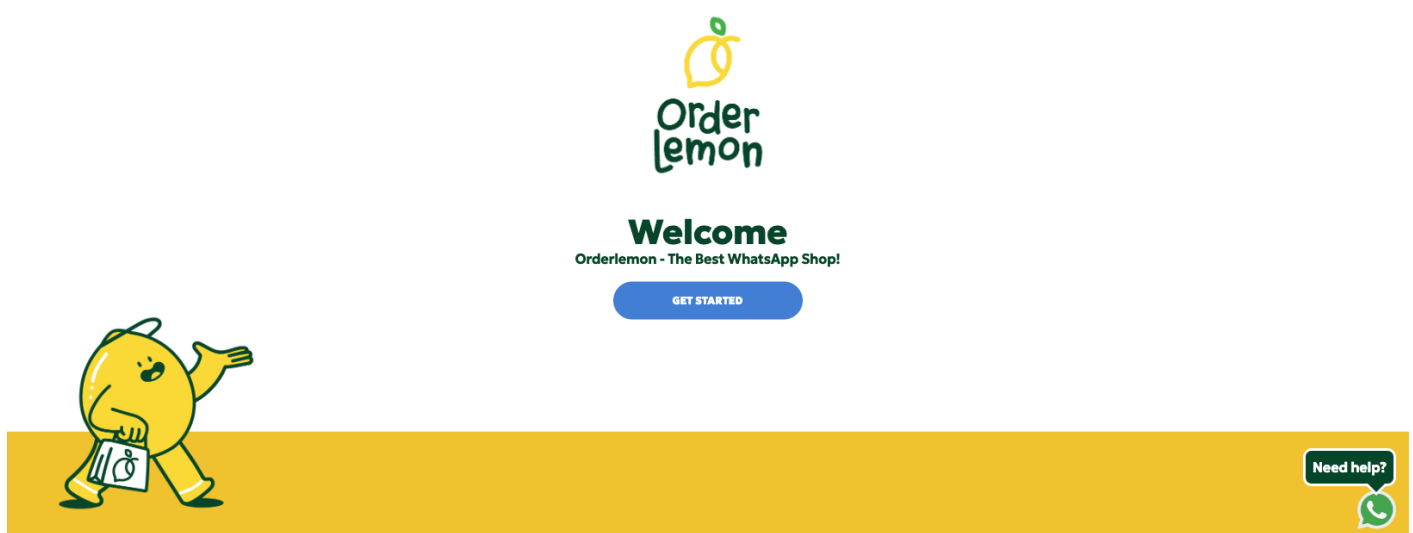
Onboarding a company in OrderLemon

On this page, you can find all the steps needed to onboard a new company in OrderLemon.

The onboarding page

On the login screen, you can scan a QR code. If this is the first time you use this phone number, this onboarding page will open.
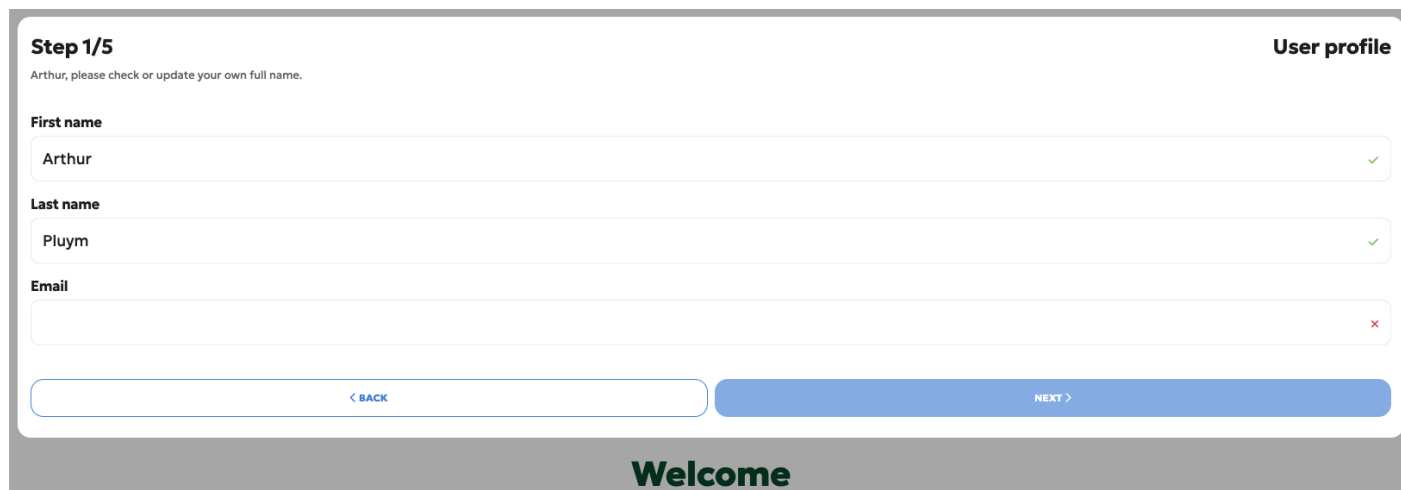To start the onboarding, click on the "GET STARTED" button in the middle of the screen.
If you have any questions during the onboarding, you can contact us by clicking on the WhatsApp logo in the bottom right corner.

Your personal information

The first questions you must answer are your **name**, **surname** and **email address**.

You cannot use an email address twice, as it is used in the payment platform to identify the account.
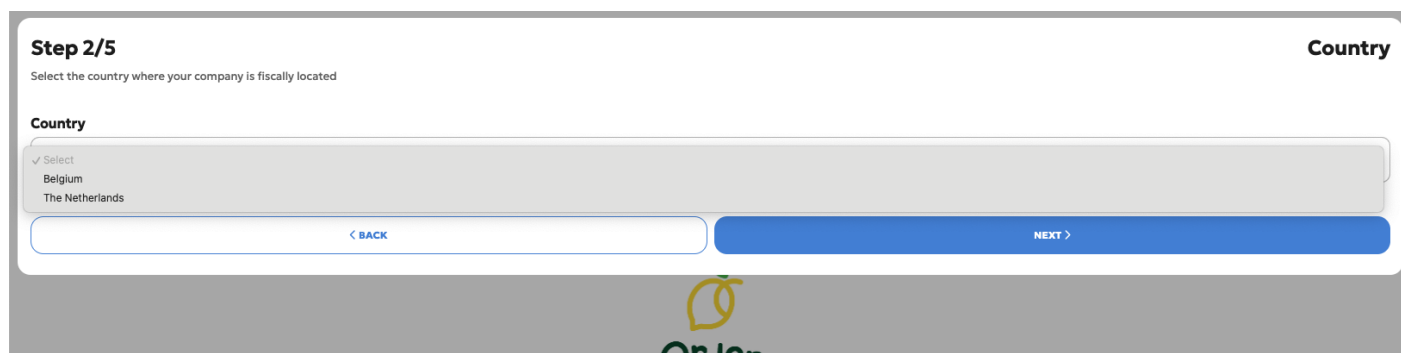

The VAT number

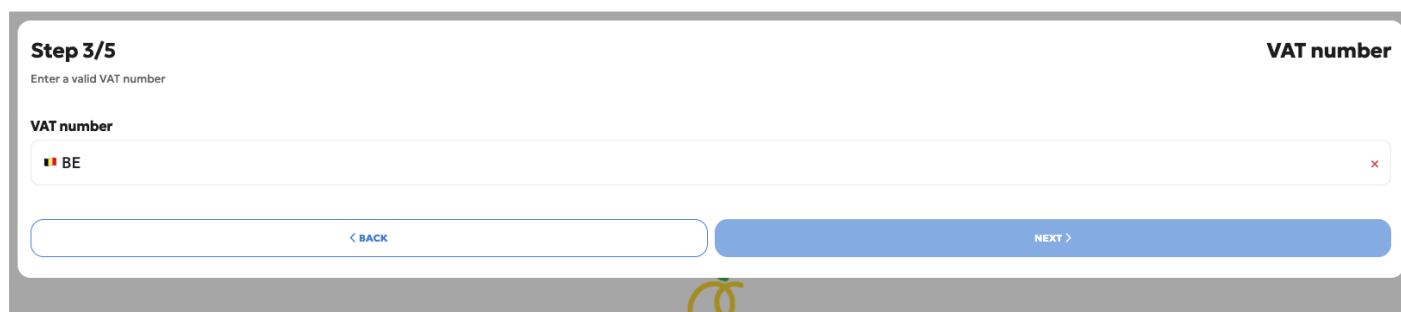To make sure the VAT number is correctly structured VAT-number, we ask you to choose the country where your company is registered.

After you have selected the correct country, fill in your VAT number. Checks are built in to make sure the code is structured correctly.

We need the Chamber of Commerce code for extra legal checks in some countries.

Step 3/5

Enter a valid VAT number

VAT number

≡ NL   ✕

Chamber of commerce number

(Required)

‹ BACK   NEXT ›

Your first shop

While we look for your company with your VAT number, you can start creating your first shop in OrderLemon.

The **shop name** is the name you will see in the app and the clients in WhatsApp.

The rest is **the address of the shop**. Clients will see this information, so make sure it is the correct address.

Step 4/5   **Add shop**

You can already fill in the details of your main shop/location while we check you VAT and company details.

Shop name

Shop name   ✕

Shop country

Select   ⌄

Street + number

Street + number   ✕

ZIP

ZIP   ✕

City

City   ✕

‹ BACK   NEXT ›

Your company details

We could find your company details based on the VAT you filled in earlier. Please check everything, as our information source is not 100% accurate.

It can happen that we couldn't find any information. In that case, you need to fill in all the fields manually.

We use this information for invoices and other official documents. Please make sure all the information is 100% accurate.

The subscription

Next, you can choose which type of subscription you would like.
Both options are excluding the 0.35 Euro + 1.5% per order.
Our options are:

- A Monthly subscription.
- A Yearly subscription.

After your confirmation, a stripe page will open where you can pay the subscription.

Stripe

You can pay your subscription on this Stripe page.
There are multiple payment options you can choose from:

- Credit cards
- Bancontact
- iDeal
- Sepa

After you have chosen and filled in all the required information, you can pay the subscription.
If the payment is accepted, Stripe will send you an invoice to the email address in the contact information. We automatically fill this field with the email address we got from you in the first step of the onboarding.

Terms and conditions

The last step before you can edit your shop is accepting our terms and conditions.
You can see two different files.
The first is a document for Meta. Without your signature, we cannot provide you with a WhatsApp number.
The second file is our terms and conditions.

Sign or accept
We have updated the following documents so please sign or accept to continue using OrderLemon

META AGREEMENT

TOS AGREEMENT

At the bottom of both files is a signature field. Without a signature in those two fields, you cannot continue.
After you have signed both, you will receive the files you just signed in your mailbox.

WhatsApp Business Program Addendum (FINAL 7.6.2020) 12

Agreement Signature

_____
Arthur Pluym
23-01-2024
I am authorised to sign and accept this agreement on behalf of NV FABULOR

Sign here

Clear

‹ BACK

ACCEPT ›

Company onboarding video

On this page, you can find the whole onboarding instruction video.

https://www.youtube.com/embed/QNOj101brgk

A few extra steps to take

Before you can go live with your shop, a few more steps should be taken.

Some of those steps need to be done in OrderLemon, the others in Facebook.

You should have received an email with all those steps. All of them are listed on this page with some more information. If you have questions about those steps, don't hesitate to contact our support via WhatsApp.

Steps in OrderLemon

Add your products.

We cannot make a catalogue if you don't have products in the shop. If you open the products page in OrderLemon, you will see that we have a dummy product ready. This is to at least have a product to send to Meta. Please remove this item when you add your products.

An in-depth explanation of products and how to add or edit them can be found in a further chapter. Read that guide as well, please.

Choose your favourite products.

On top of sending a list with all the categories you have made in the shop, we send a list with your 30 most favourite products.

You can set them on the products page. In the row of four action buttons on top, click the option most to the right. A list with all the products will open with a star behind the product. To mark it as a favourite, click on the star to fill it.

An in-depth explanation of products and how to add or edit them can be found in a further chapter. Read that guide as well, please.

Facebook

OrderLemon makes it possible to order via WhatsApp. To set up a number with WhatsApp, you need a Facebook Business Account -FBBA-.

Facebook Business Account

To make an FBBA, you need to have a personal Facebook Account.

To do so, you go to business.facebook.com and log in with your Facebook account. When logged in

- Click "Create Business account" to create one.
- Give the FBBA a clear name, preferably the company's official name.
- Open the People tab in the menu on the left.
- Share the account with the email address you have received in the email.
- Open the Business Information tab in the menu on the left.
- Fill in all the Business info. This info needs to be exactly the same as on your business registration document.

If not all those steps are fulfilled, we cannot connect a number for your WhatsApp shop.

Domain verification

The following step is not necessary for companies with two shops or less but is mandatory for those with three shops or more. We **DO** recommend **EVERY** shop to do the following two steps. You'll miss out on so many options in WhatsApp if you don't do those.

The domain verification will be needed when you try to get your FBBA verified.

- Open the Brand Safety tab in the menu on the left.
- Add your web domain.
- Verify your domain.
  - We suggest using the DNS text option.

FBBA verification

This verification is needed to add more numbers to the FBBA or to use all the options available for WhatsApp.

You'll need one of the following documents to provide to Meta:

- **Certificate/Articles of Incorporation**
- **Business registration or licence document**
- **Government-issued business tax document:** This could include a tax certificate. Self-filed tax documents are not accepted.
- **Business bank statement**
- **Utility bill:** A utility bill is only accepted for a **Business address** and **Phone number**. The legal business name must be on the utility bill. A utility bill is not an acceptable

document for legal business name verification.

Later, when you try to go for a green tick in WhatsApp, a verified FBBA is required.

For this verification, all the previous steps should have already been completed.

Website

Make sure your website has all the information filled in the FBBA and at least the following pages:

- About us
- Privacy policy
- Terms and conditions

The verification

Open the Security Center tab in the menu on the left and start the verification.

Follow all the steps and pray for a good result. If you, by any chance, didn't do one of the previous steps on this page, you will never pass the verification. Please make sure you did them correctly.

In this video, you can see how to start a Facebook verification process:

https://www.youtube.com/embed/iH0obIP7vGw

One last step before takeoff!

You only have one more step to take for takeoff!

And that is to let us know you've shared the Facebook!

We check our email regularly, but to speed up the process, we recommend you contact us after you've handled all the Meta trouble.

The shared emails will arrive in the spam folder. Some emails could be missed if we aren't notified.

The home page or Dashboard

In this chapter, you can find everything about the home page of the application.

The dashboard

Categories and Products

In this chapter, you can find everything about categories and products. At the end of the chapter, you can find a short video explaining how to do everything mentioned in the first couple of pages.

Import products

Instead of adding all the products manually, you can use the import function to import all the products from an XLSX file.

Download the template

All products need to follow a set structure to be imported. To make it clear and usable for everyone, we made a template you can use.

To download the template, you have to:

- Open the products page
- Click the template button in the top left corner
- Open the file: "products_template".

Fill in the template.

In the XLSX file, you just downloaded, you will find a table with titles on the top and item IDs on the left.

Fill in all your products, one product per ID.

Titles marked with a red * mark are required to be filled in.

Article number

In the article number, you can fill in the number/ID you have for this product in your existing system.

The article number can be a number, text or a combo of both.

Article name *

The name of the product. Nothing special here.

Description *

Here, you can add a description of the product. When people open a product on WhatsApp, this description will be shown to them.

Picture: URL *

All products need to have a picture. In this template, you need to fill in the picture's URL. Make sure to have the picture's URL and not a URL of any cloud. We cannot download images that are hidden behind a cloud.

A good example of a picture is this one from our demo shop:

https://stg.images.orderlemon.com/shops/products/3/2/orderlemon_22.jpg?v=1706189418

Price in EUR *

This needs to be a **number**. You cannot add a symbol in this field.

The VAT needs to be included in the price.

The VAT *

Here, you can set the VAT percentage. This needs to be a **number**.

This is important for us to create invoices and receipts for your accounting.

Category *

Here, you fill in to which category the product belongs. You can have only 30 products per category, and the name can only be 24 characters long.

Category ID *

Each category has an ID. You can choose which one, but it needs to be a **number**. We use this number to order products and categories, so if you make a mistake here, the products won't show

up as you want.

Stock

How much of one item do you have available? This field is not required. If empty, we see it as an unlimited amount of items.

Has stock *

Fill in YES if you want to work with stock, and fill in anything else if you don't have a specific number of items for this product.

Import the template

To import the filled-in XLSX file, you have to follow the next steps:

- Open the product page in OrderLemon
- Click on the Import option in the options at the top of the page
- Copy the whole list of products, including the titles and IDs
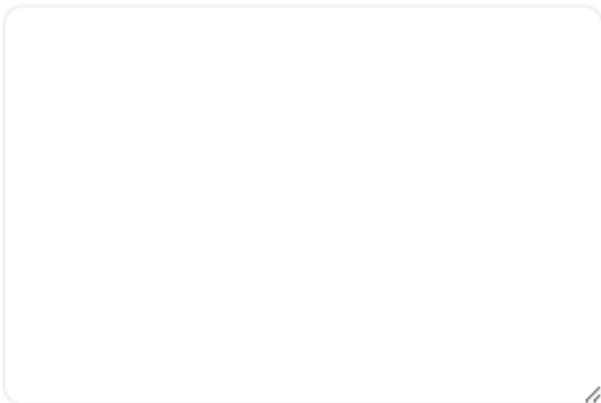- Paste everything in the pop-up
- Click on Import

Import

Select all fields in the template sheets file and copy paste them in the field below

⚠ **This will override all your previous categories and products**

Paste here:

IMPORT

Afterwards, the products will be uploaded in the background. You can do something else.

Categories

Products are divided into multiple categories to make it easier for clients to look for their favourite products.

WhatsApp disclaimer

Due to WhatsApp limitations, we can only show up to ten categories.

You can have as many categories as you want in OrderLemon, but only ten can be active.

All the active categories will be shown in WhatsApp as a list the user can pick from.

Broden ○

Bolletjes ○

Gebak ○

Cake en koek ○

Mini koek ○

Taartjes en schnittes ○

Croissants ○

Krokante broodjes ○

2 zakken broodjes €3,2 ○

When clients choose one category, they will receive a message with all the active products of this category.

Add a new category.

To add a new category, follow these steps:

- Go to the products page
- Click on the add new button at the bottom right corner
- Fill in all the details
  - The description is not visible to the client
- Add a picture
  - Pictures need to be at least 500x500 px
  - Pictures aren't visible to the clients
- Save the details

Edit a category

To edit a category, follow these steps:

- Open a category on the products page
- Click on the big edit button at the top left corner of the page
- Change the details you want to change, activate or deactivate the category or change the picture
  - The name is visible to the client
  - The picture and description aren't visible to the client
- Save the details

Change the display order in WhatsApp

You can change the display order of categories in the WhatsApp list to your liking.

- Change the display option to list
- Drag and drop the items in the preferred order

Products

On this page, you can find everything about products in OrderLemon.

WhatsApp disclaimer

Due to WhatsApp limitations, we can only show up to 30 products per category.

You can have as many products as you want in OrderLemon, but only 30 can be active.

Add a new product

To add a new product, you can follow the next steps:

- Open the category where you want the product to be in
- Click on the add new button in the bottom right corner
- Fill in all the details of the product
  - Clients can see all the information filled in except the stock and the VAT.
- Add a picture of the product
  - Pictures need to be at least 500x500 px
- Save the product

Edit a product

To edit a product, follow these steps:

- Click on the product you want to edit
- Edit the details you want to edit
  - Clients can see all the information filled in except the stock and the VAT.
- Save the product

Delete a product

To delete a product, follow these steps:

- Click on the product you want to delete
- Click on the delete button at the bottom
- Confirm the deletion
    - This action is irreversible

Change the display order in WhatsApp

You can change the display order of products in the WhatsApp list to your liking.

- Change the display option to list
- Drag and drop the items in the preferred order

Favourites

What are "favourites"?

Favourites are the products the clients will see first. You can select them yourself so they are more like your recommendation to the client.

The first list of products clients get to see is this list of recommendations of yours.

We can send 30 products in a product list, so don't be shy to mark 30 products as your favourites.

Why use "favourites"?

There are multiple reasons to use favourites in OrderLemon:

- Clients don't have to look for their favourite product
- Clients don't have to send multiple messages for a specific product
- Clients will see more products you recommend and might be interested in trying them

OrderLemon doesn't work without at least one favourite product. But yet again, we recommend having at least 20 to 30 to use the favourites message to its full potential.

How do you set the "favourites"?

To select your favourite products, you can follow these steps:

- Open the products page
- Click on "Favourites" in the top right corner
- Scroll through the products and mark the favourites with a filled star
  - You can search for specific products in the search bar

The products video

The campaigns

In this chapter, you can find all information about what we see as a campaign and how you can set them up yourself.

Campaigns

The settings

In the settings chapter, you can find everything about the user, shop and company settings.

The user settings

The shop settings

The company settings

Communication with OrderLemon

In this chapter, you can find everything related to OrderLemon communication.

Support

Feature releases