COPPER PEAK
LOGISTICS

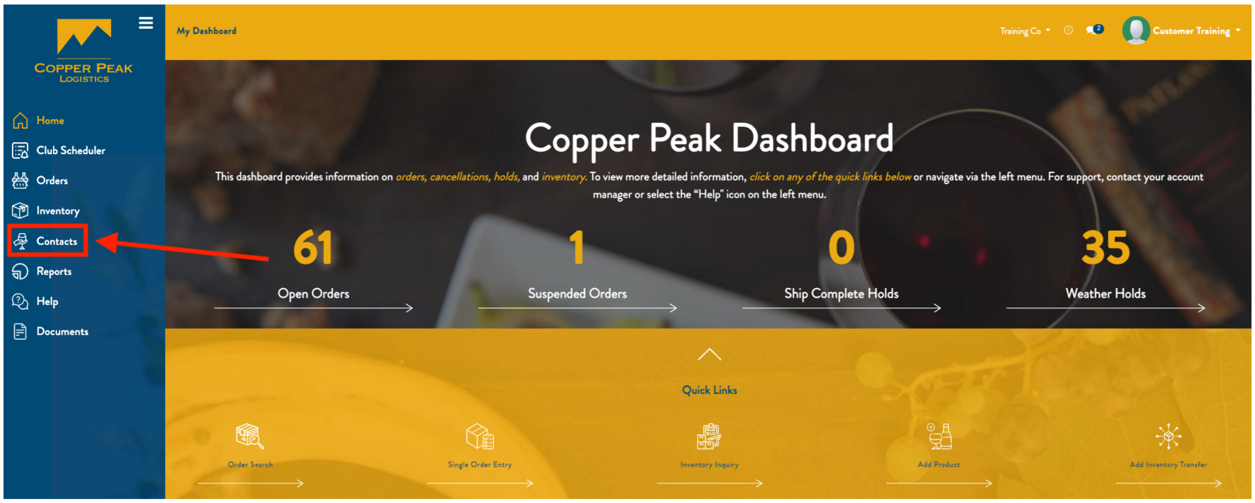
CopperLink Contacts Support Documentation

For Copper Peak

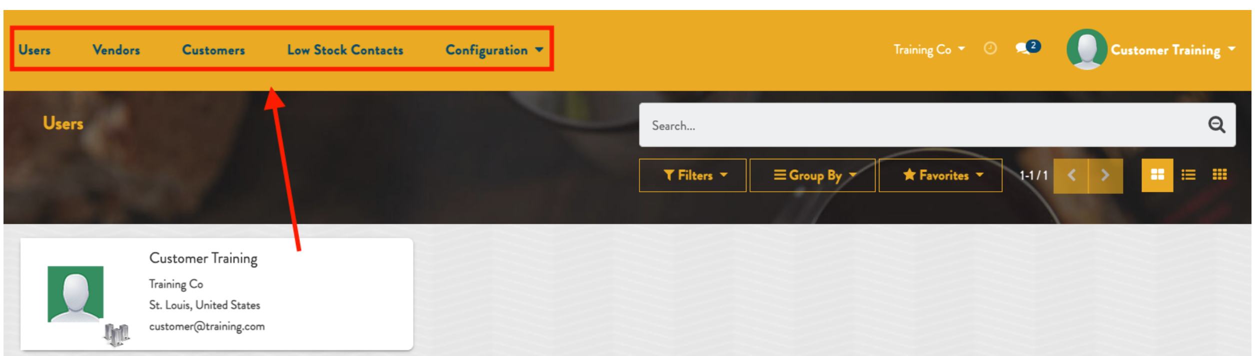
The following documentation addresses the functionality under the Contacts tab in the main menu. Note that we have grouped all “people/users” together including Users, Vendors, Customers, Low Stock Contacts and Email History and Configuration. This documentation will explain the way each is created, edited, structured, and organized in CopperLink.

Contacts

From the Home screen, select Contacts from the Main Menu options on the left.

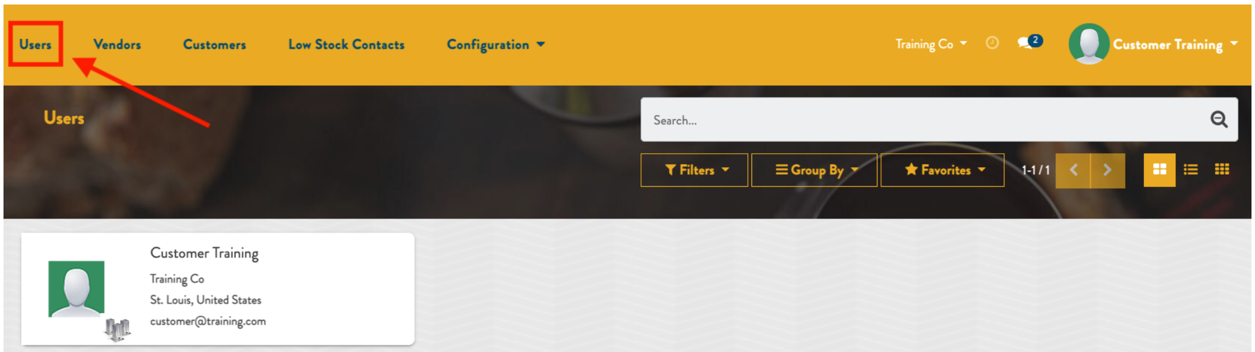


Here, you can access Users, Vendors, Customers, Low Stock Contacts or Email History and Configuration by navigating to each via the menu options below.



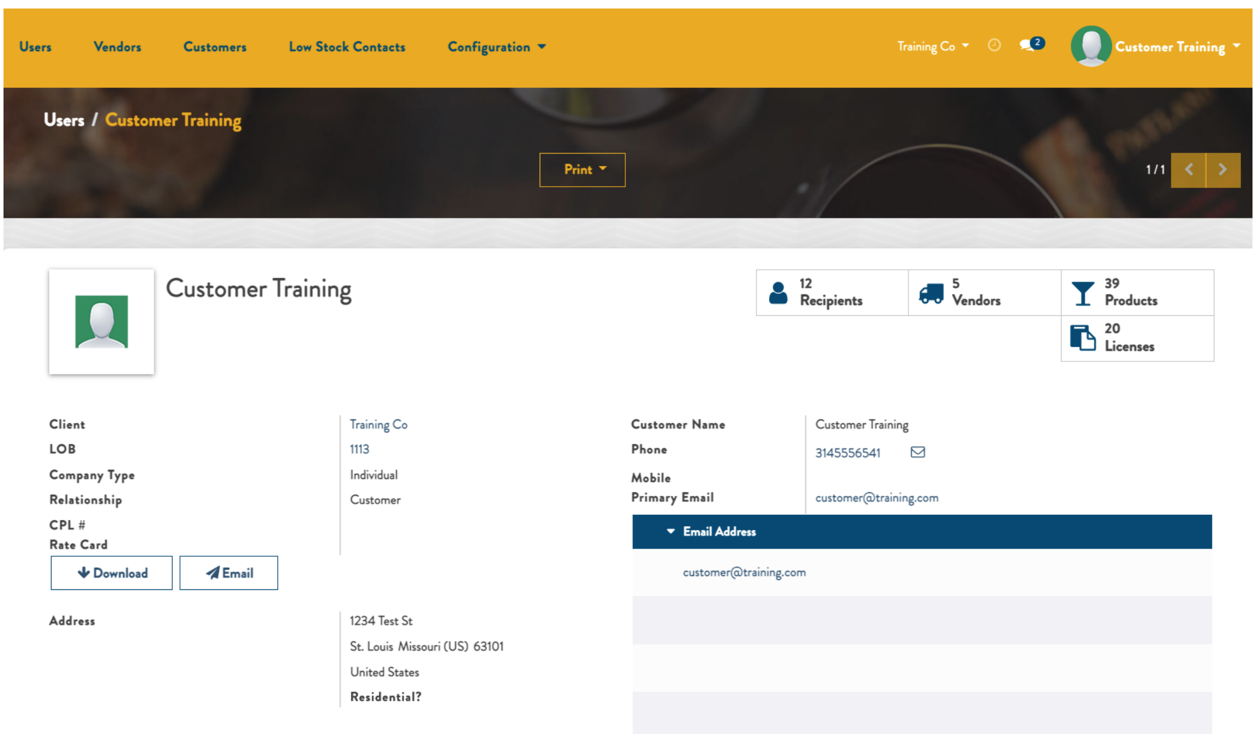
Users

Users include everyone that currently has access to the account. To access the Users menu, click Users in the yellow section at the top of the Contacts menu. This will display all Users in the system, as shown below:



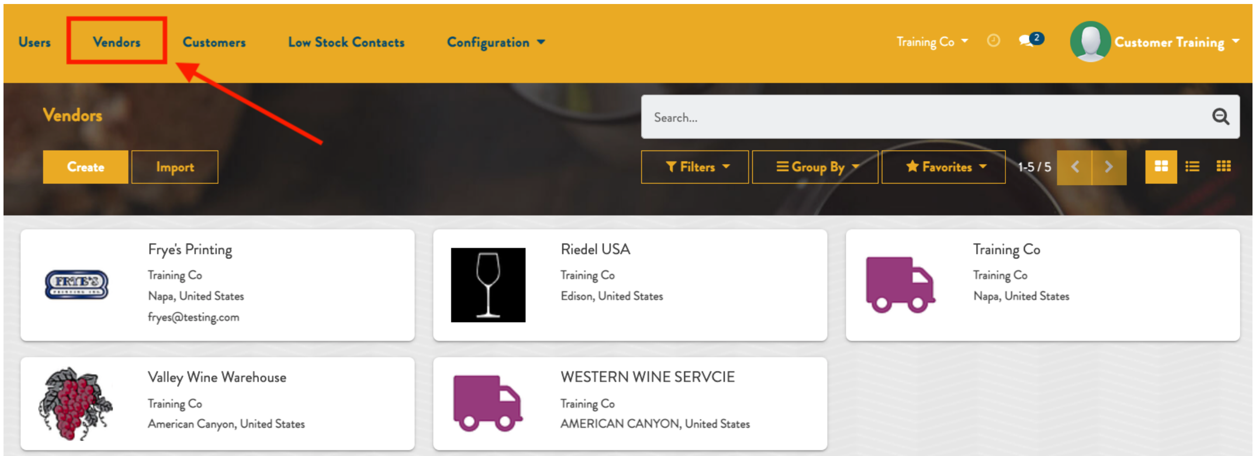
View a User

Click on the User you would like to view. This will display their information as shown below:



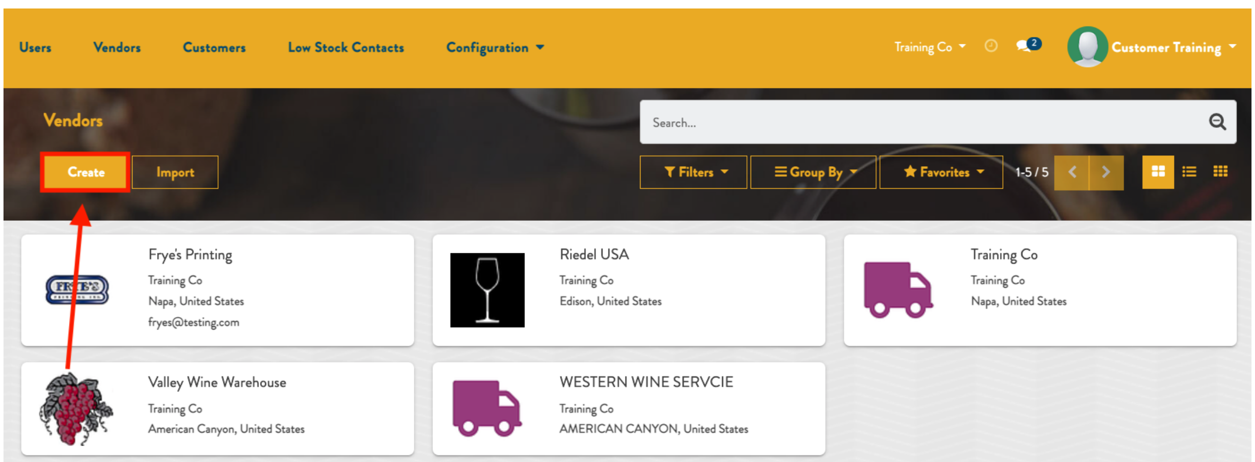
Vendors

To access the Vendors menu, click Vendors in the yellow section at the top of the Contacts main menu. This will display all Vendors in the system, as shown below:



Creating a Vendor

To create a new Vendor, click Create in the upper left corner of the screen as shown below:



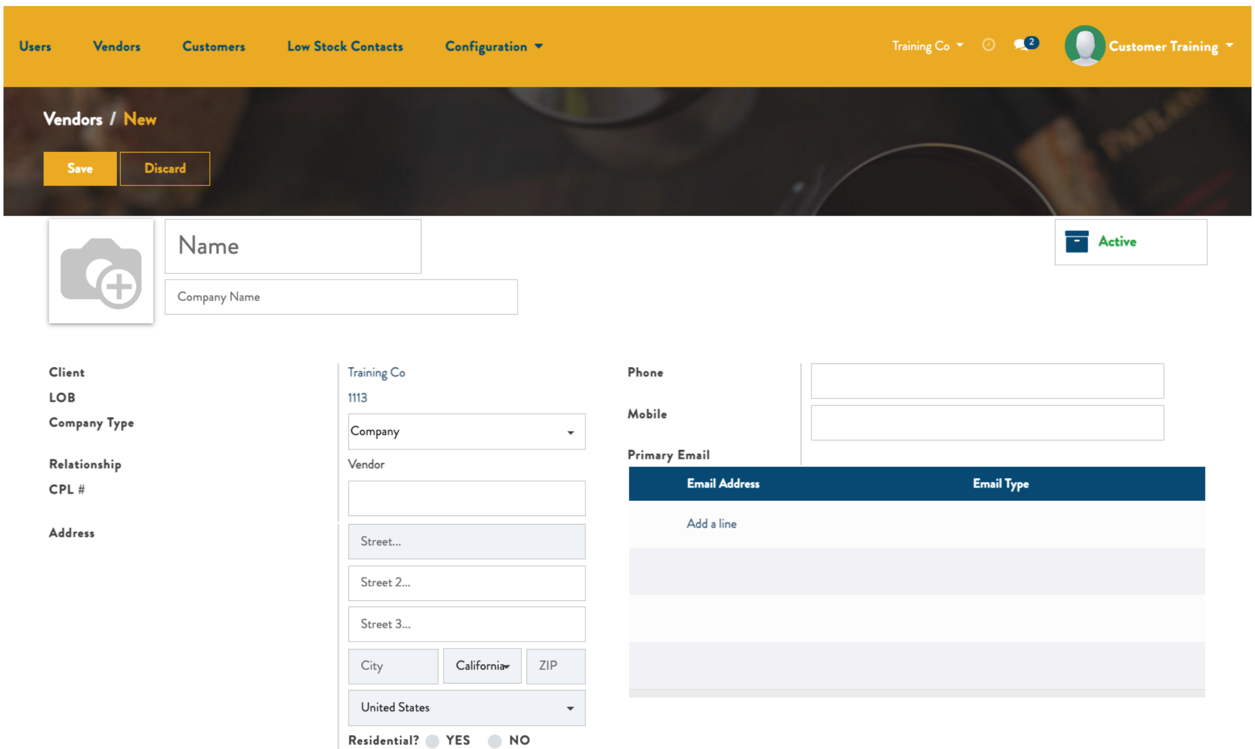
From here, complete the fields and click Save to confirm or Discard to abandon the changes.

Required fields:

- Name
- Address

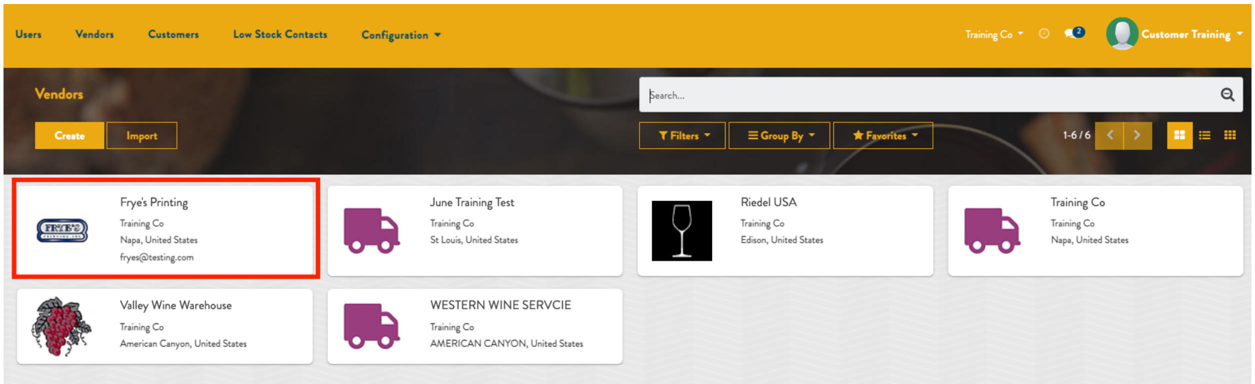
Additional fields:

- Company Name
- Company Type
- CPL #
- Phone
- Mobile
- Primary Email

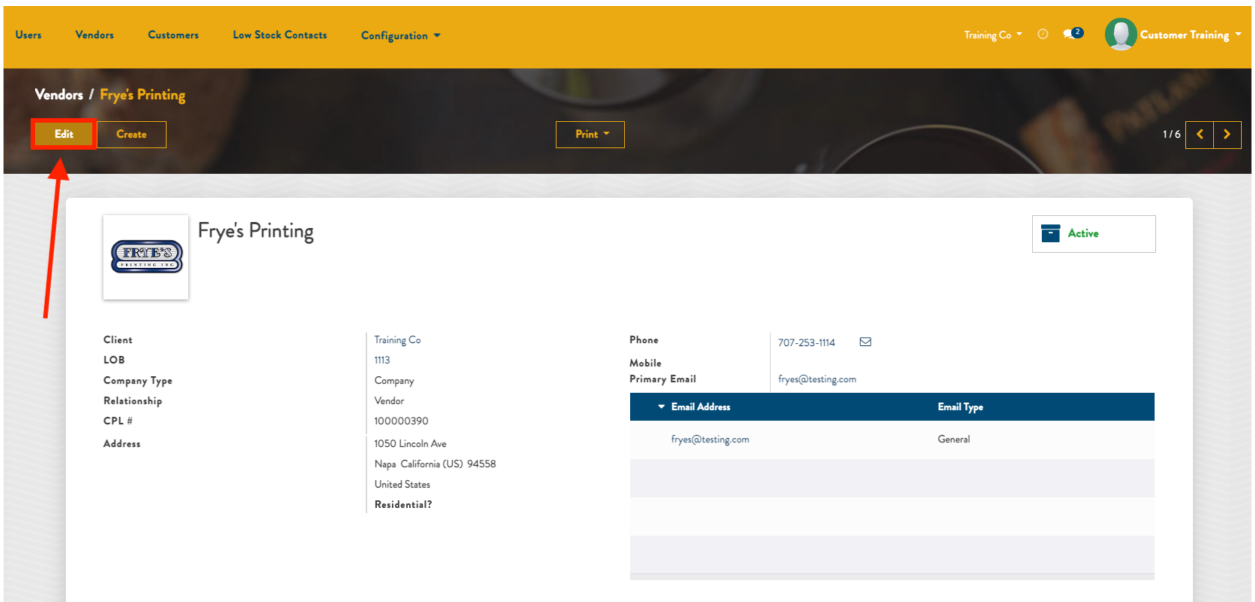


Editing a Vendor

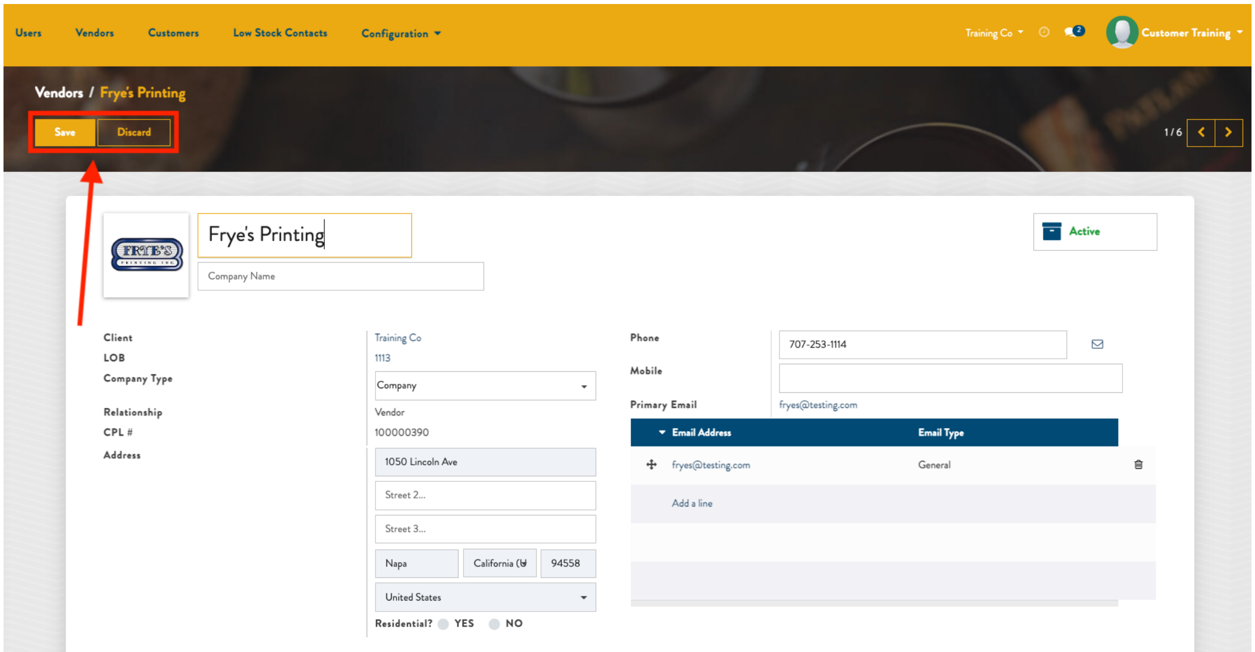
Find the Vendor you'd like to edit and click on their card.



Click Edit in the upper left and make the desired edits.

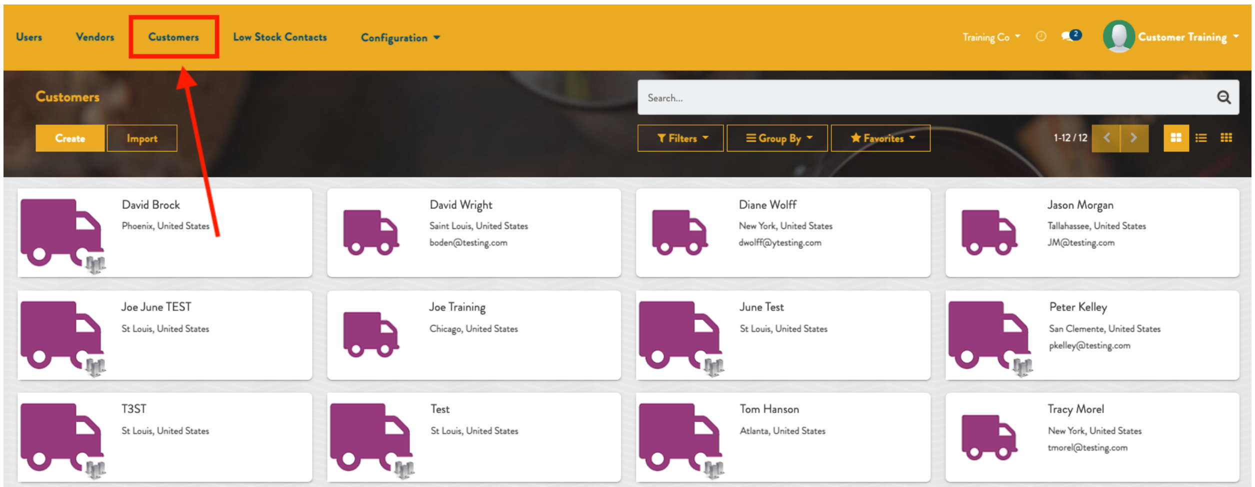


Click Save to confirm or Discard to cancel.


Users
Vendors
Customers
Low Stock Contacts
Configuration
Training Co
Customer Training
Vendors / Frye's Printing
Save
Discard
1 / 6
Frye's Printing
Company Name
Active
Client
Training Co
LOB
1113
Company Type
Company
Relationship
Vendor
CPL #
100000390
Address
1050 Lincoln Ave
Street 2...
Street 3...
Napa
California (U
94558
United States
Residential?
YES
NO
Phone
707-253-1114
Mobile
Primary Email
fryes@testing.com
Email Address
Email Type
fryes@testing.com
General
Add a line

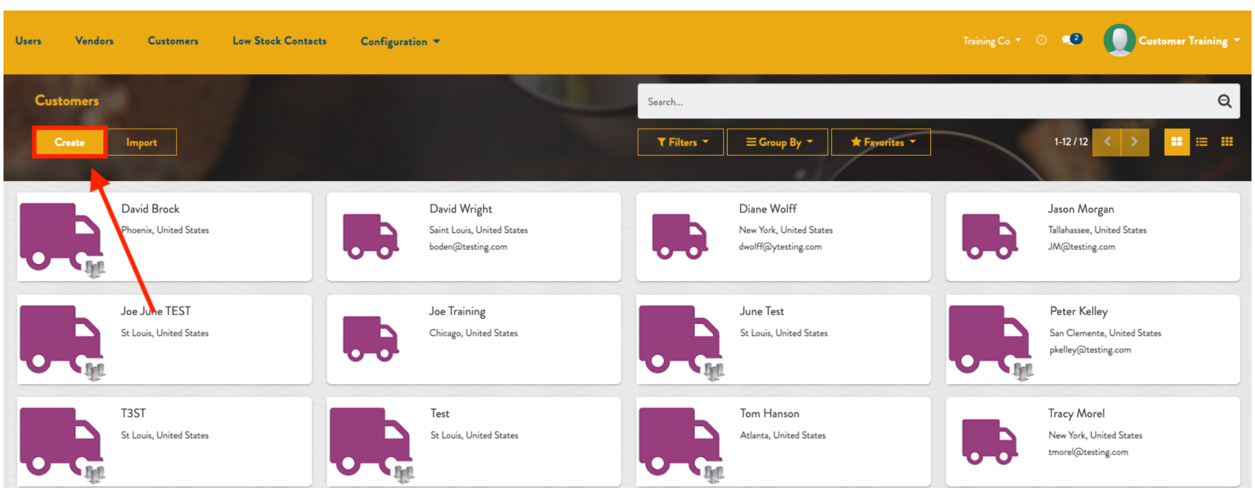
Customers

To access the Customers menu, click Customers in the yellow section at the top of the Contacts main menu. This will display all Customers in the system, as shown below:



Creating a Customer

To create a new Customer, click Create in the upper left corner of the screen as shown below:



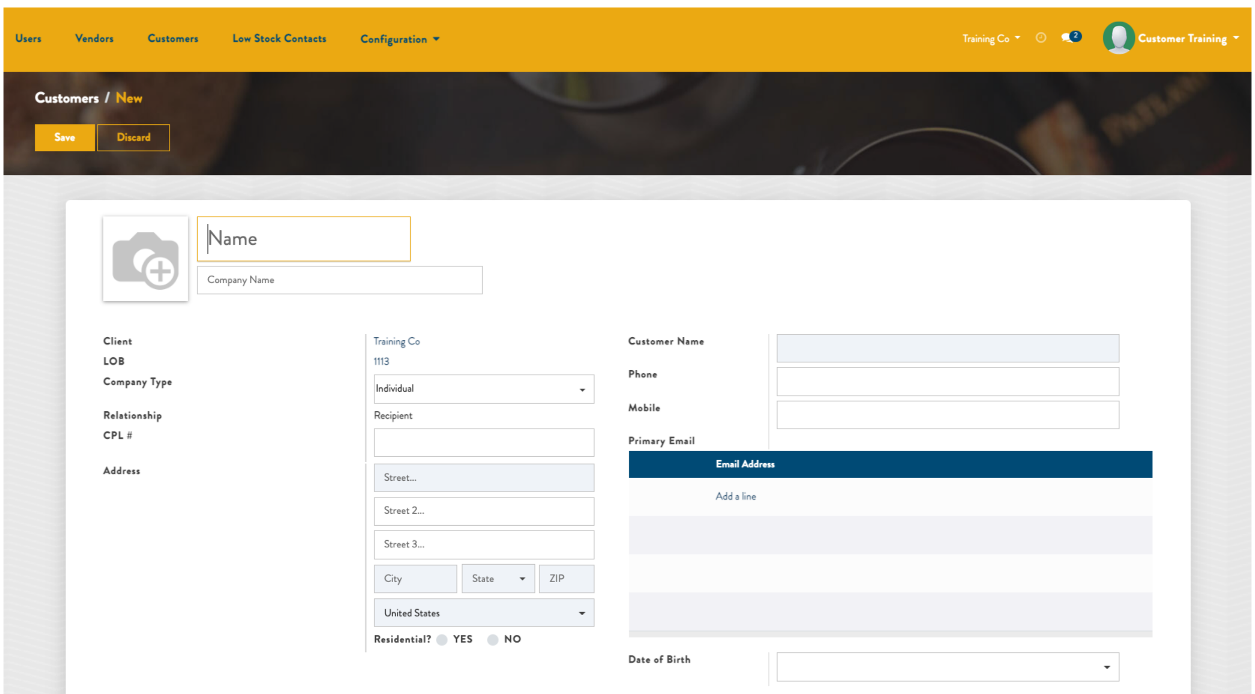
From here, complete the fields and click Save to confirm or Discard to abandon the changes.

Required fields:

- Name
- Address

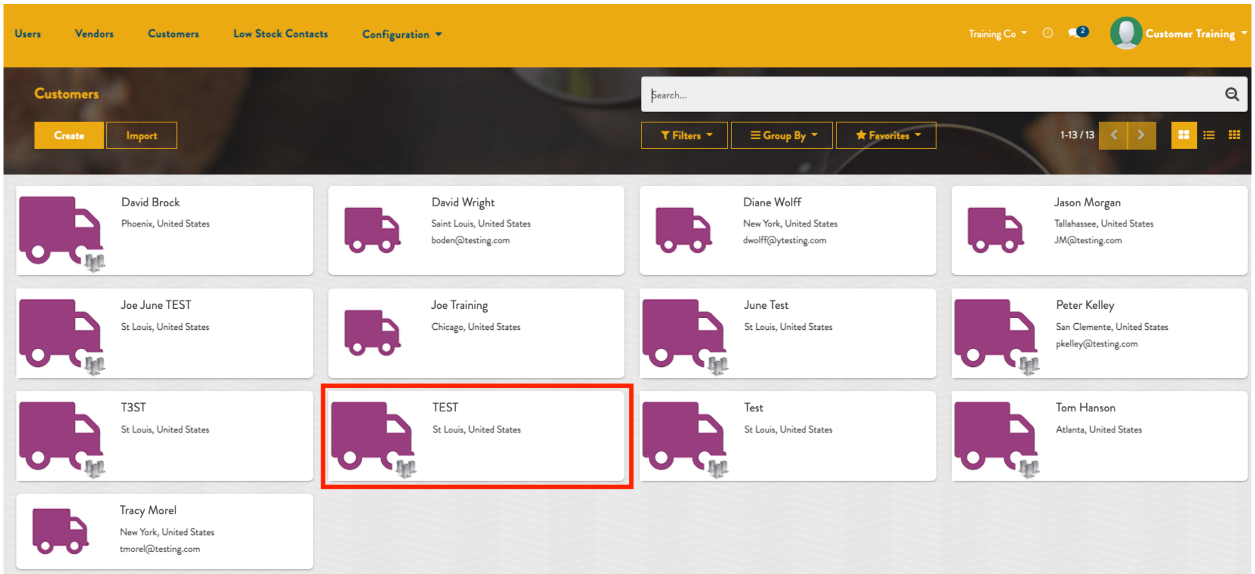
Additional fields:

- Company Name
- Company Type
- CPL #
- Phone
- Mobile
- Primary Email
- Date of Birth

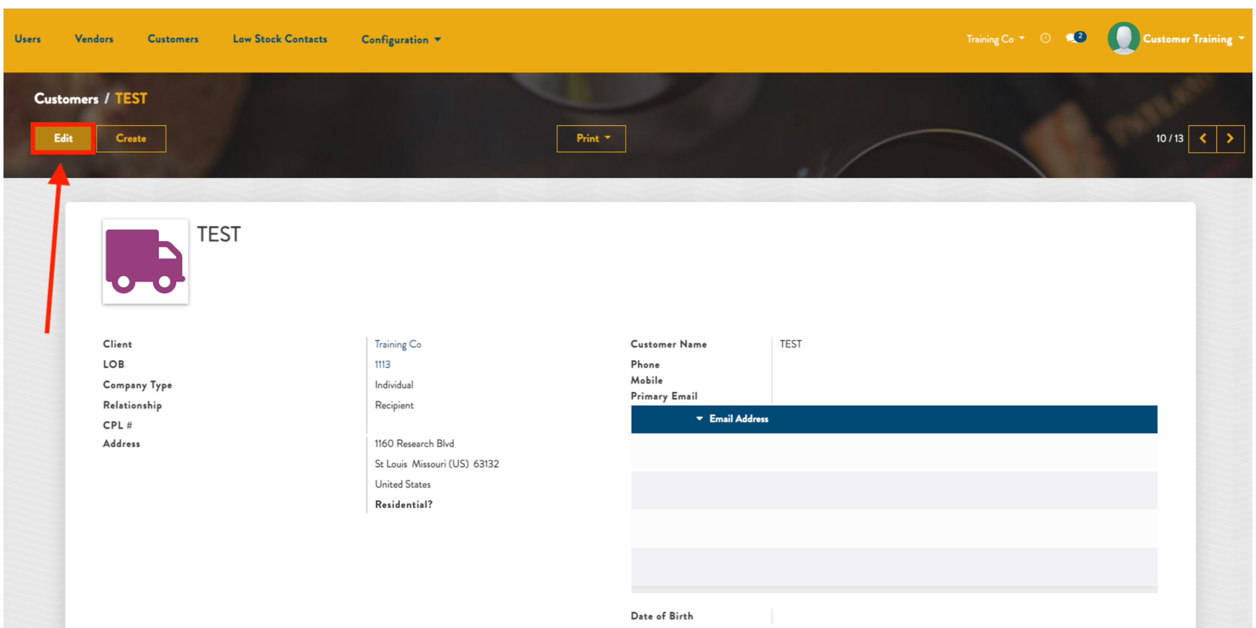


Editing a Customer

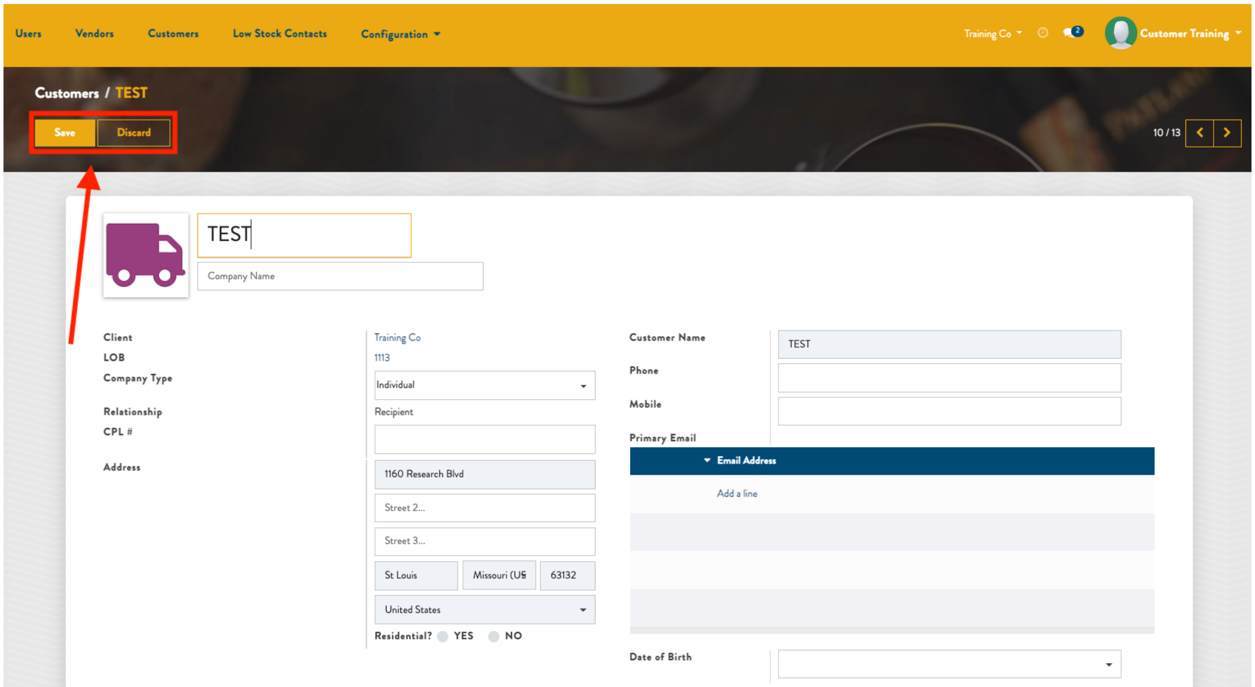
Find the Customer you'd like to edit and click on their card.



Click Edit in the upper left and make the desired edits.

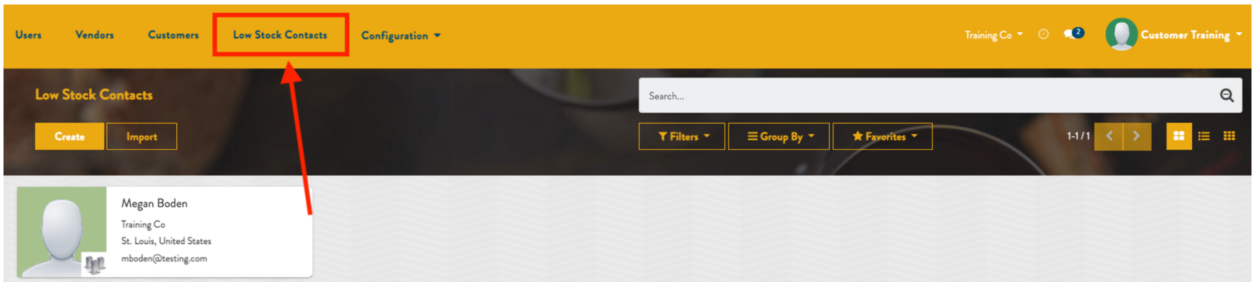


Click Save to confirm or Discard to cancel.


Users
Vendors
Customers
Low Stock Contacts
Configuration
Training Co
Customer Training
Customers / TEST
Save
Discard
10 / 13
TEST
Company Name
Client
LOB
Company Type
Relationship
CPL #
Address
Training Co
1113
Individual
Recipient
1160 Research Blvd
Street 2...
Street 3...
St Louis
Missouri (US
63132
United States
Residential? YES NO
Customer Name
TEST
Phone
Mobile
Primary Email
Email Address
Add a line
Date of Birth

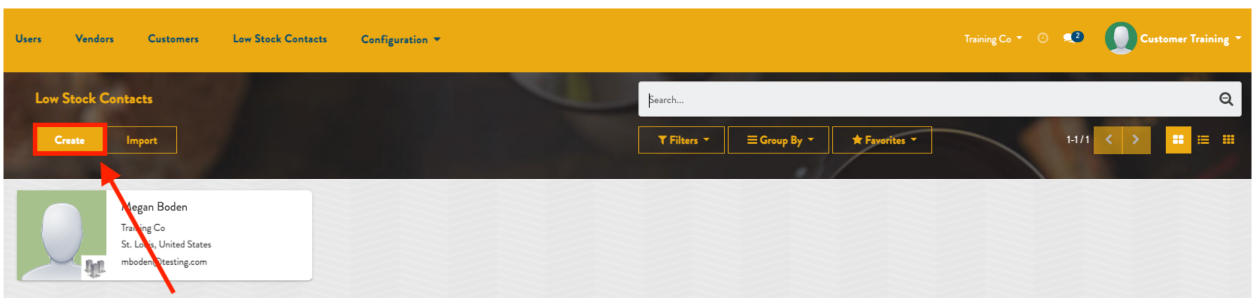
Low Stock Contacts

To access the Low Stock Contacts menu, click Low Stock Contacts in the yellow section at the top of the Contacts main menu. This will display all Low Stock Contacts in the system, as shown below:



Creating a Low Stock Contact

To create a new Low Stock Contact, click Create in the upper left corner of the screen as shown below:



From here, complete the fields and click Save to confirm or Discard to abandon the changes.

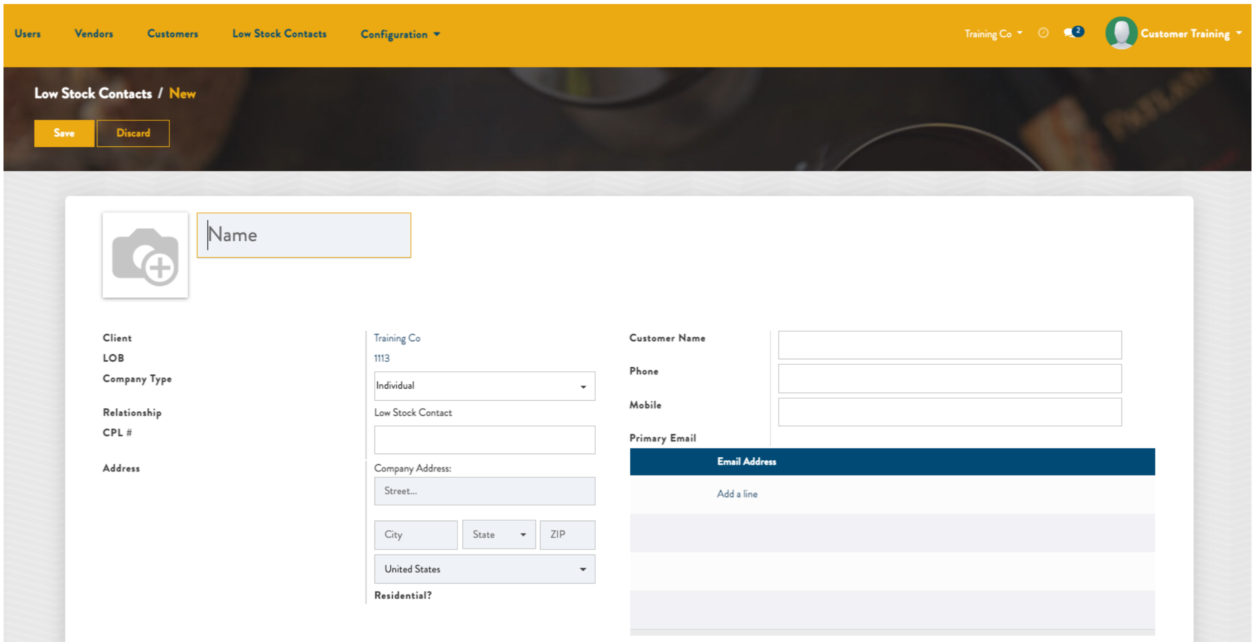
Required fields:

- Name
- Address
- Primary Email

Additional fields:

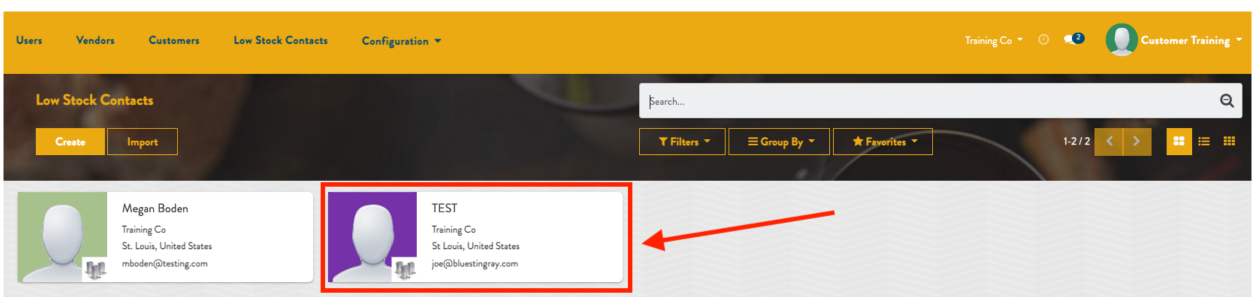
- Company Type
- CPL #
- Customer Name

- Phone
- Mobile
- Primary Email

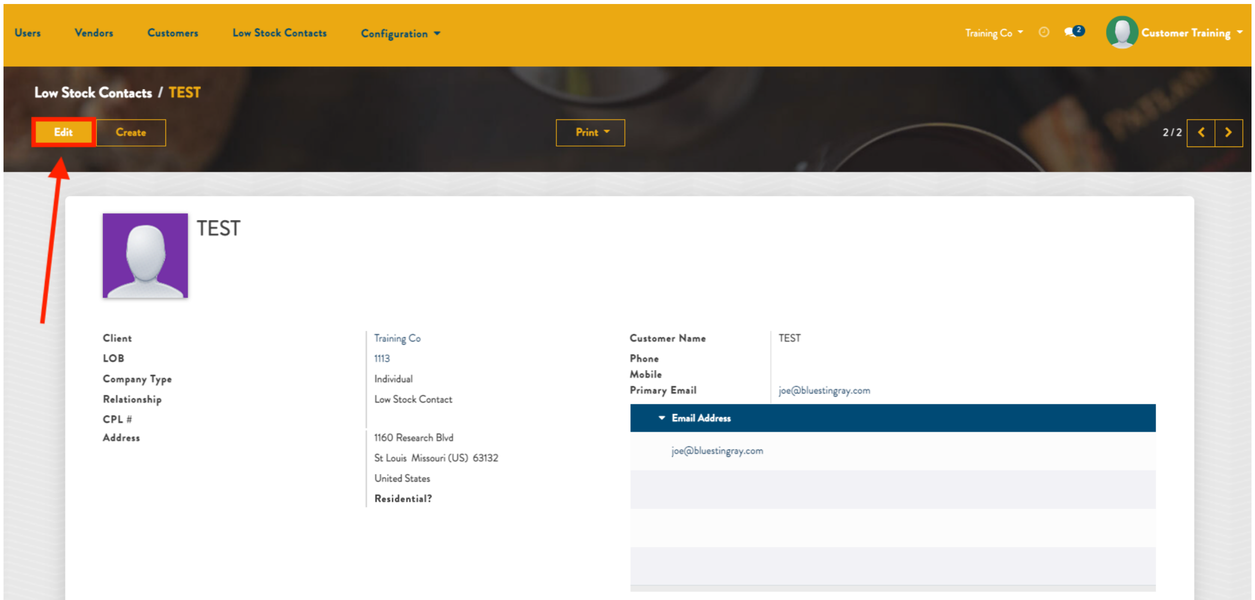


Editing a Low Stock Contact

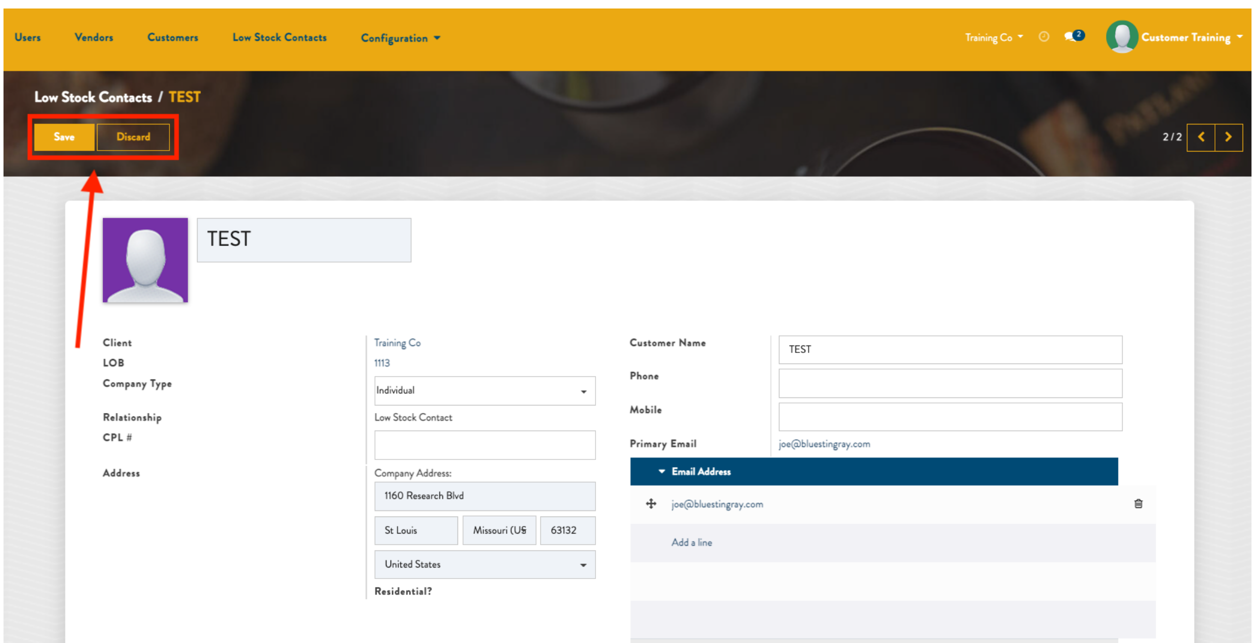
Find the Low Stock Contact you'd like to edit and click on their card.



Click Edit in the upper left and make the desired edits.



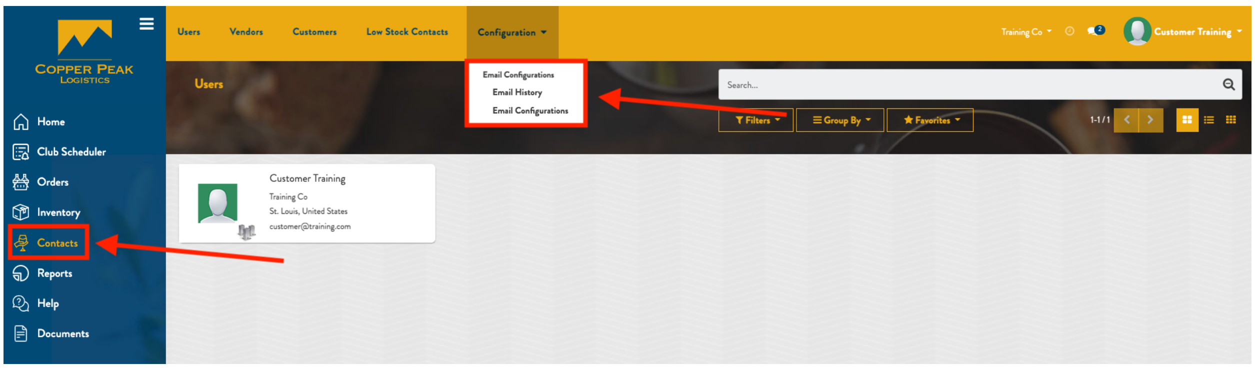
Click Save to confirm or Discard to cancel.



Configuration

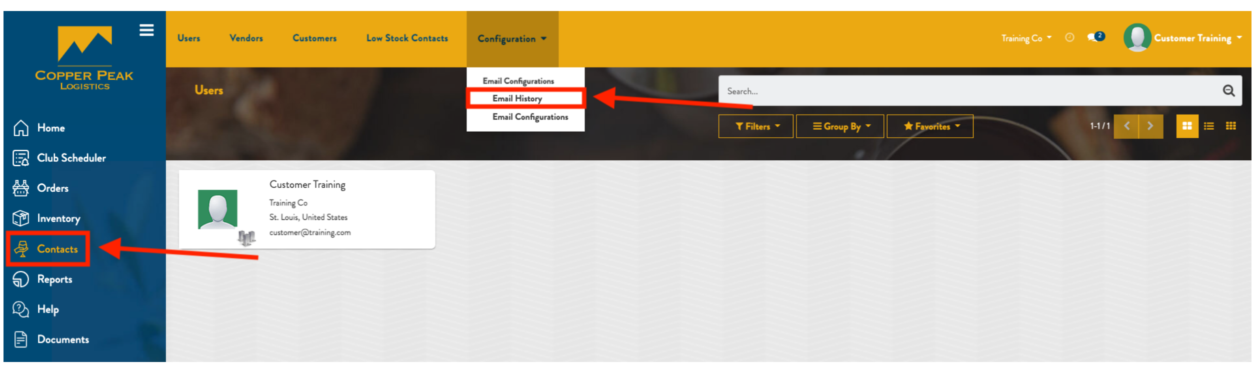
The Configuration menu houses Email History and Email Configurations for Shipment and Order Confirmation emails. By default, emails from your account in this system will be disabled. Please contact your account manager to enable email sending.

To view, first click on the Contacts menu on the left blue panel, then click the Configuration dropdown menu in the yellow bar at the top of the page, as shown below:

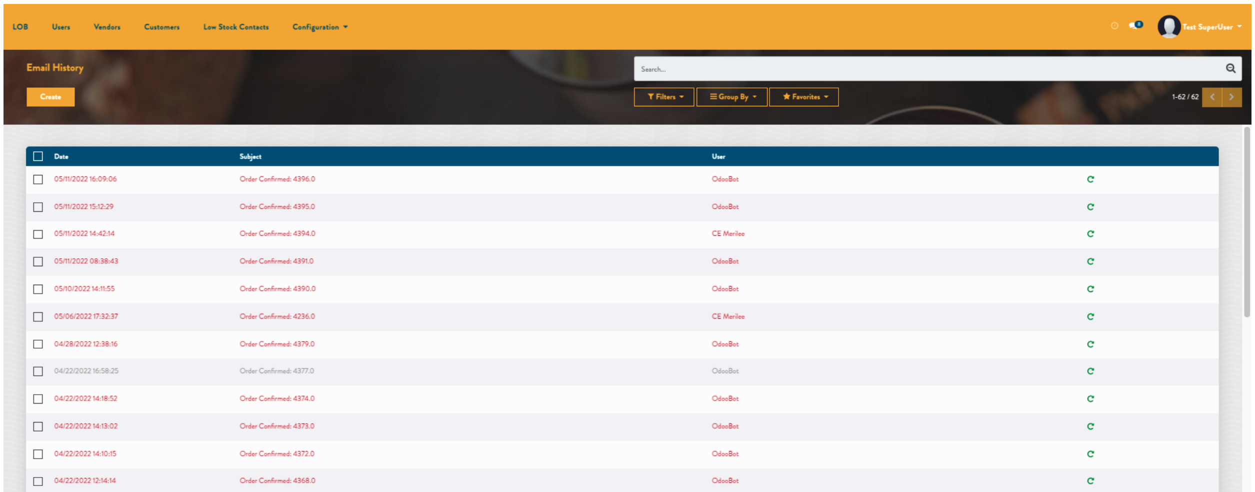


Email History

To access the Email History, click on the Contacts menu on the left blue panel, and then the Configuration dropdown menu in the yellow bar at the top of the page and select Email History, as shown below:



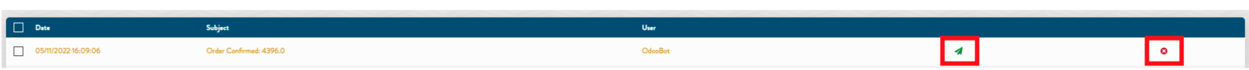
This will bring up the Email History tree shown below:



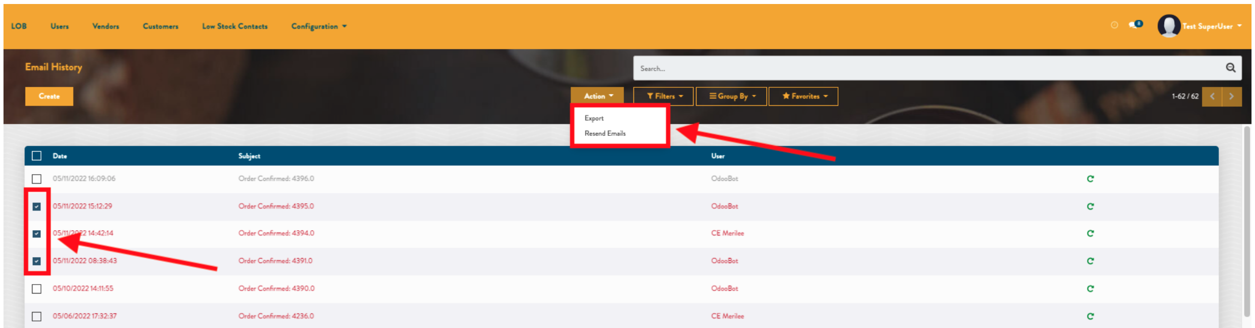
By default, Email History stores emails for seven days. Older emails are automatically deleted.

If the entry in the Email History is red, like the above screenshot, it failed to send. Try resending via the circular green arrow on the right of the entry, as shown below:

When this button is clicked, the line entry will turn yellow to denote pending status. Cancel the email by clicking the red x on the right, or send right away with the green send now button, as shown below:

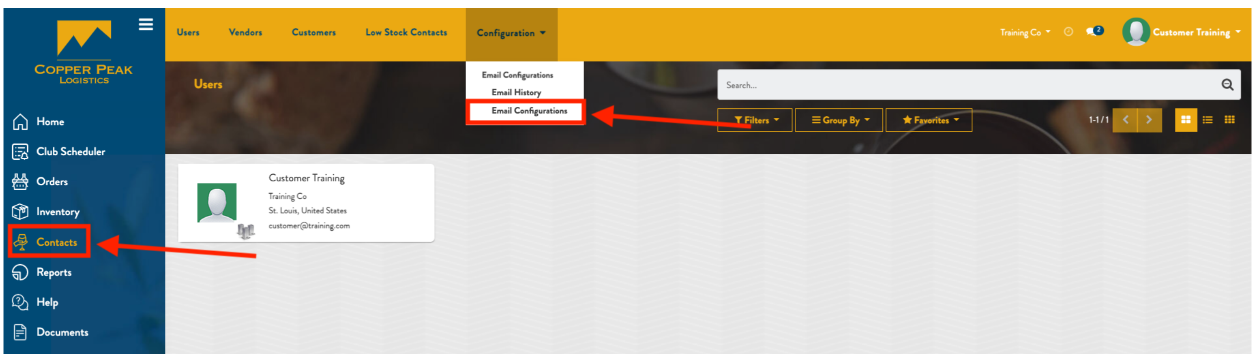


Emails can also be resent by checking the box on the left side of any line entry. When the box is checked, an Action menu appears in the top center of the screen. Click the dropdown menu and click Resend Email. This is useful when multiple emails fail to send, and you would like to resend a batch all at once.



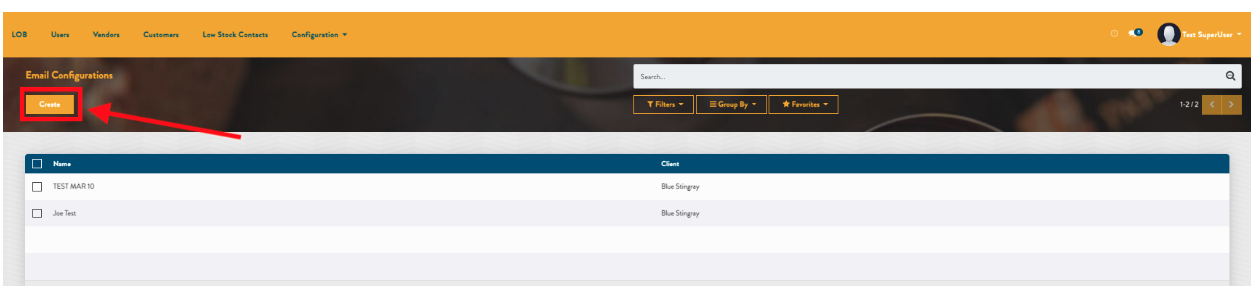
Email Configurations

Email Configurations houses a simple way to theme the emails your account sends from Copperlink. To access the Email Configuration, click on the Contacts menu on the left blue panel, and then the Configuration dropdown menu in the yellow bar at the top of the page and select Email Configuration, as shown below:

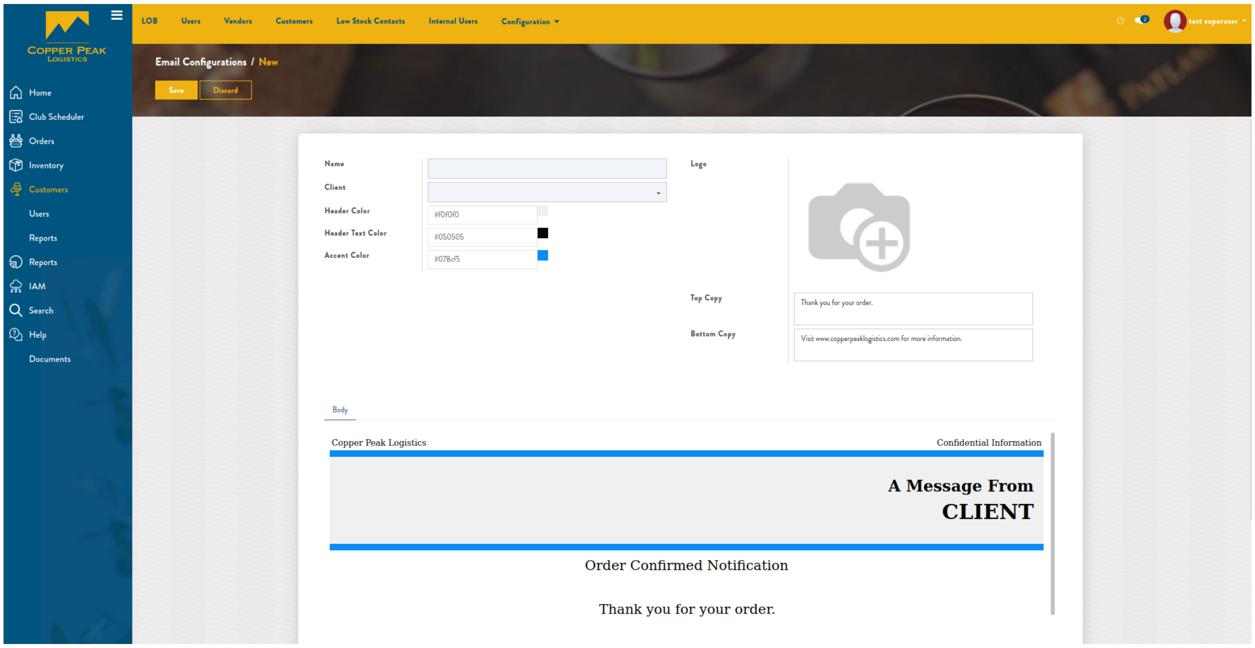


Creating an Email Configuration

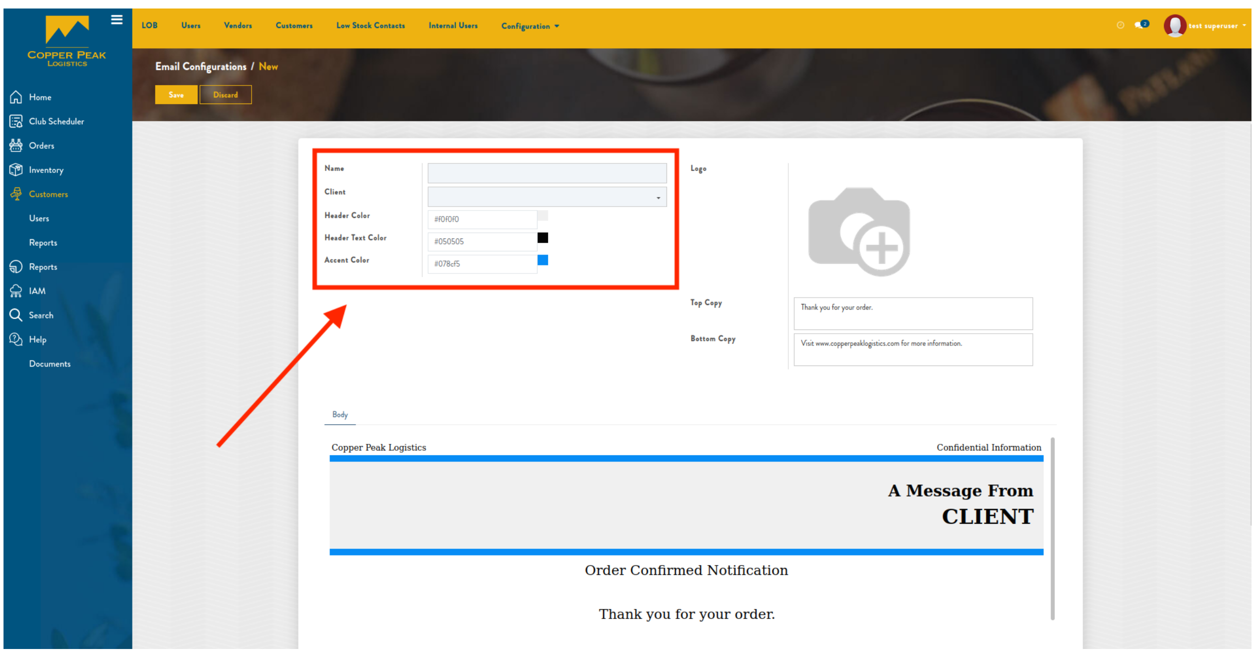
To create a new Email Configuration, click the Create button in the upper left of the screen, as shown below:



This displays the following form:



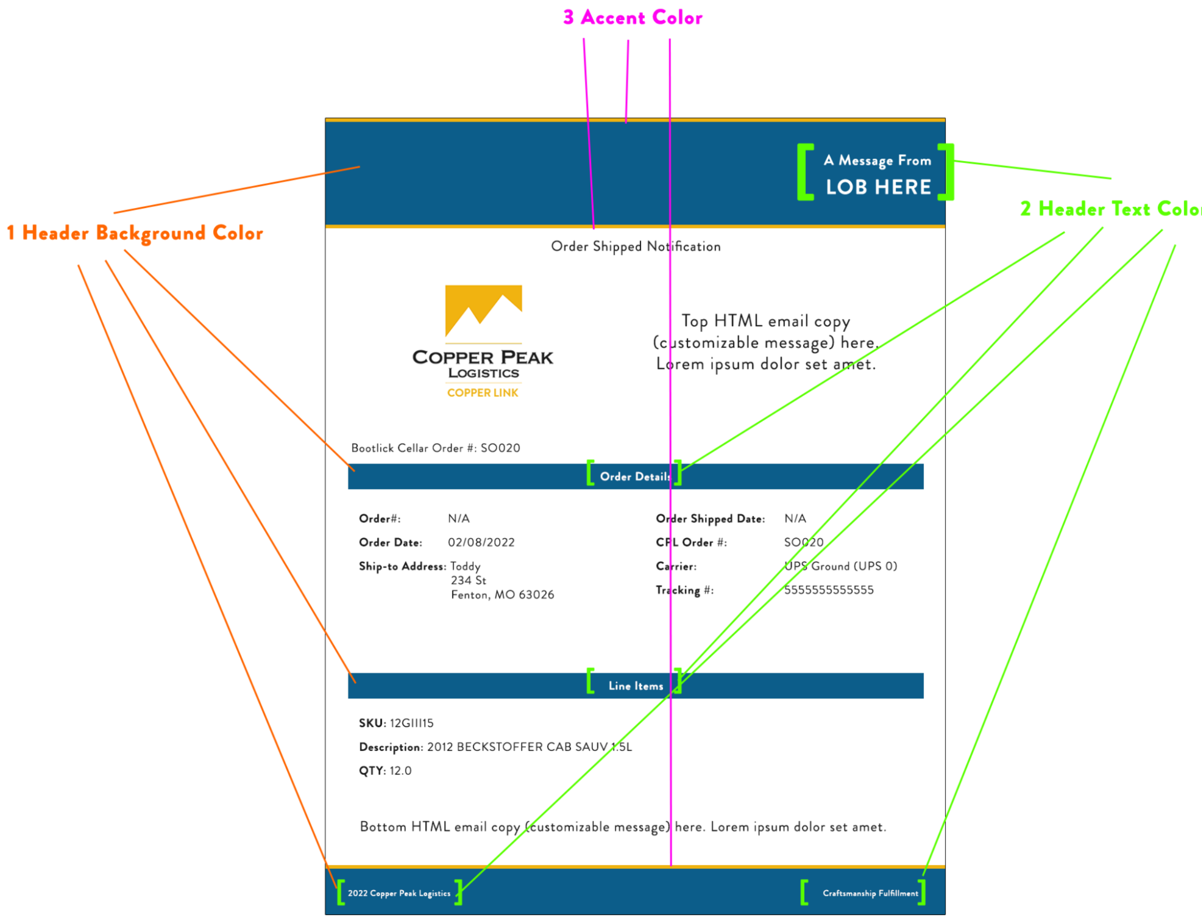
A Client or Superuser can create an Email Configuration. The difference is that for a Client, the Client field will be auto populated with their information.



First, complete the following fields:

- Name
- Client

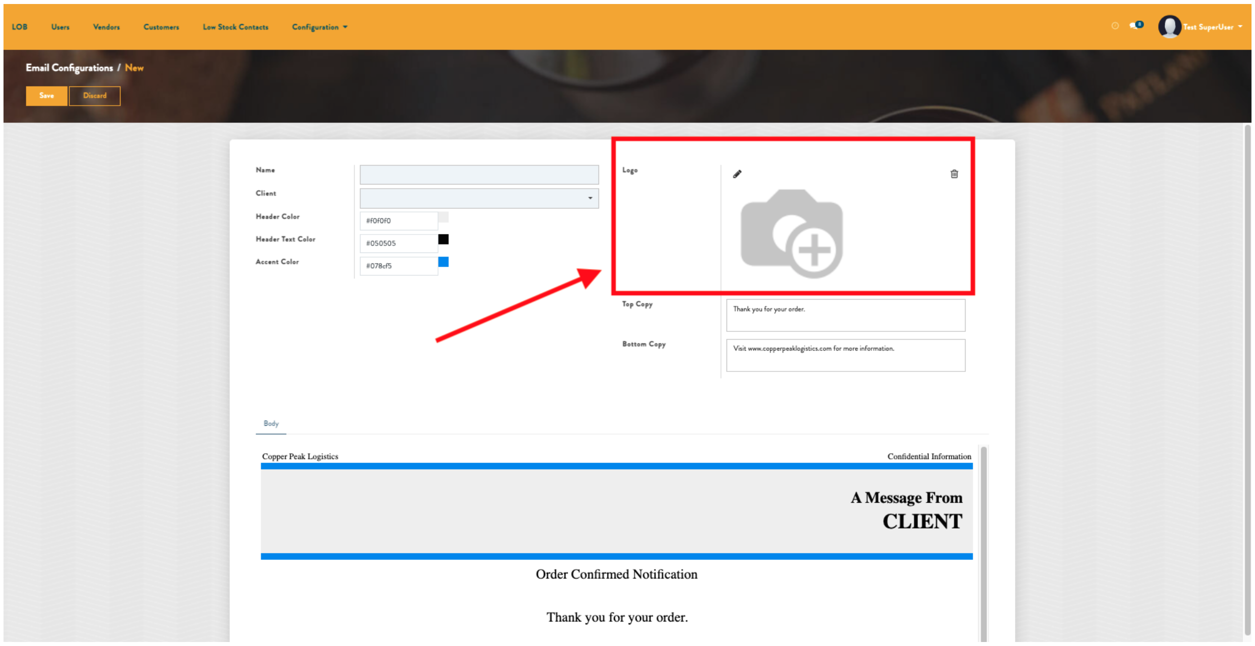
Then implement the Company's brand colors via hex codes or select colors using the color picker:



1. **Header Background Color**
2. **Header Text Color** (only affects text inside where you would see the background header color)
3. **Accent Color** (provides borders at the top and bottom)

Note: The Header Color, Header Text Color and Accent Color all are demoed in real time at the bottom of this section. This is a good place to make sure the selected Header Background Color. Please pay close attention to the contrast between your header background color and header text color and make sure the text stays legible.

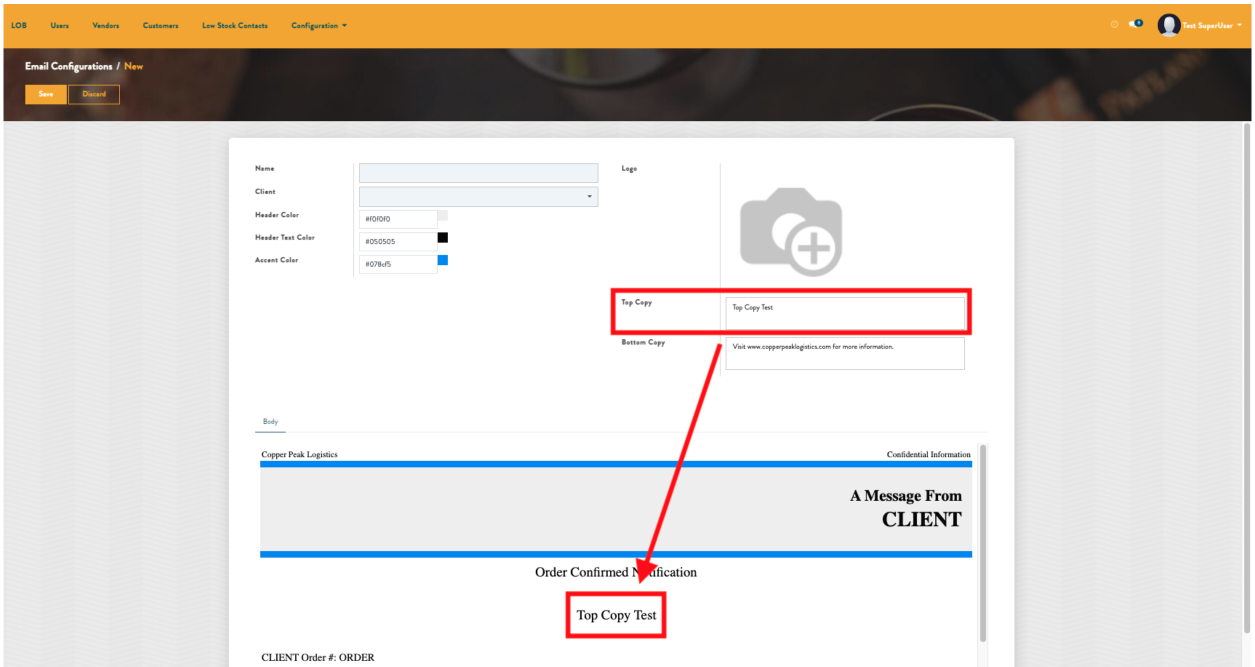
Add a logo by clicking the edit button in the upper left corner of the camera icon, as shown below:



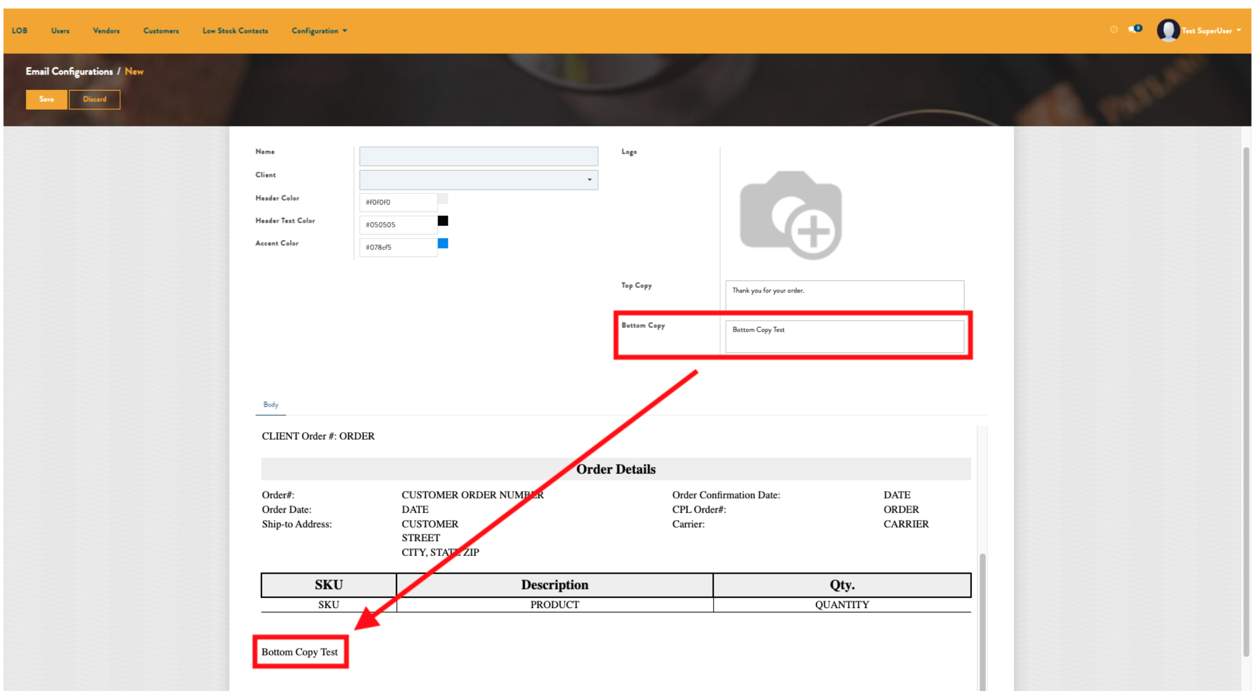
Navigate to where your logo is saved on your computer, select it and click Open. Your logo should now appear in the Logo field above. You need to click Save in the upper left corner to see the logo appear on the actual email.

Note: For best results your logo should be 300x300 pixels, and square shape. Any other size and the image may get distorted when converted to 300x300 pixels.

Next, input the Top Copy field. Typing in the Top Copy box affects the text in the lower box, as shown below:

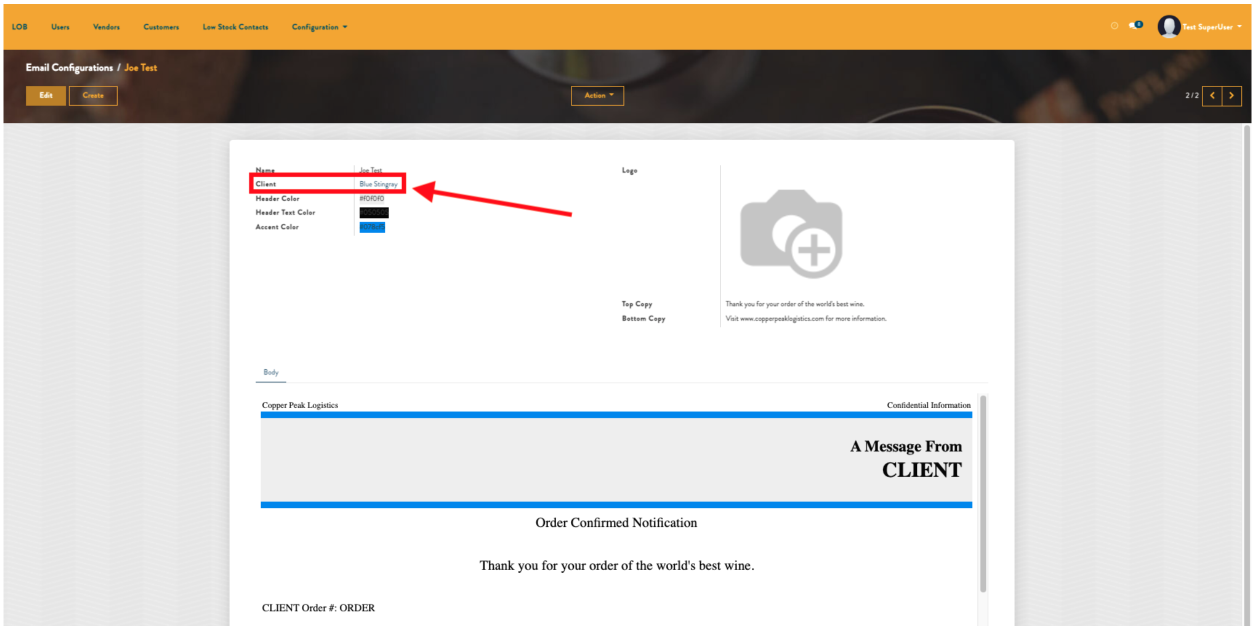


Next, input the Bottom Copy field. Typing in the Bottom Copy box affects the text in the lower box, as shown below:

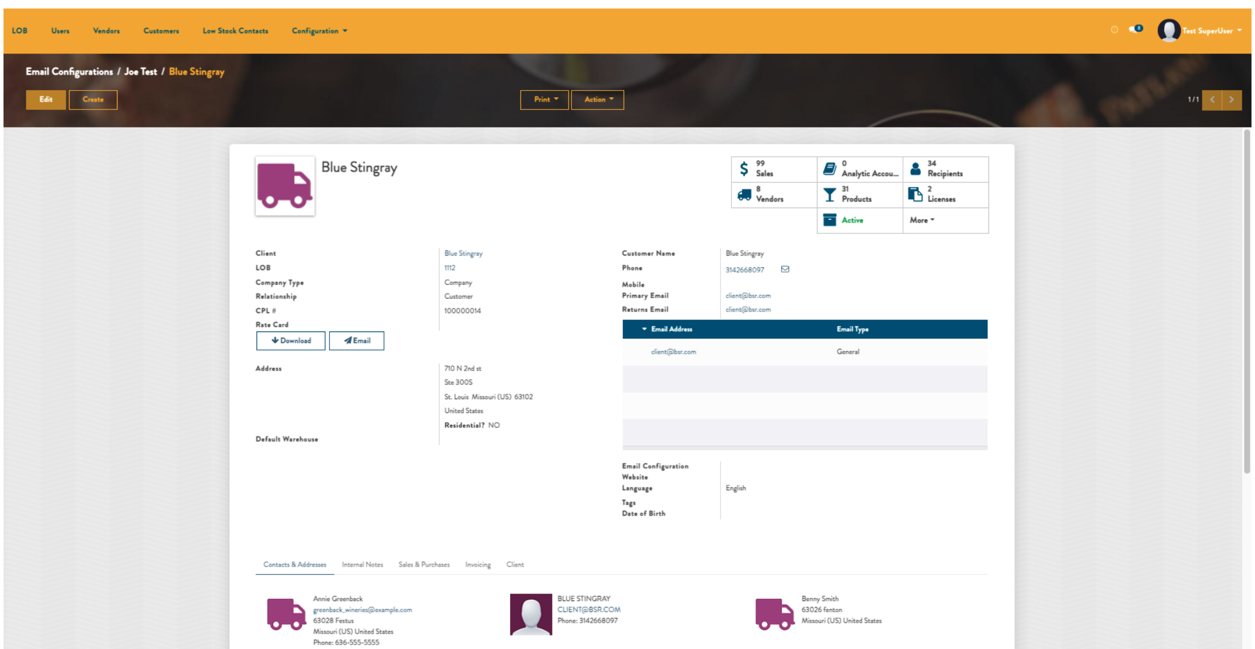


Selecting an Email Configuration

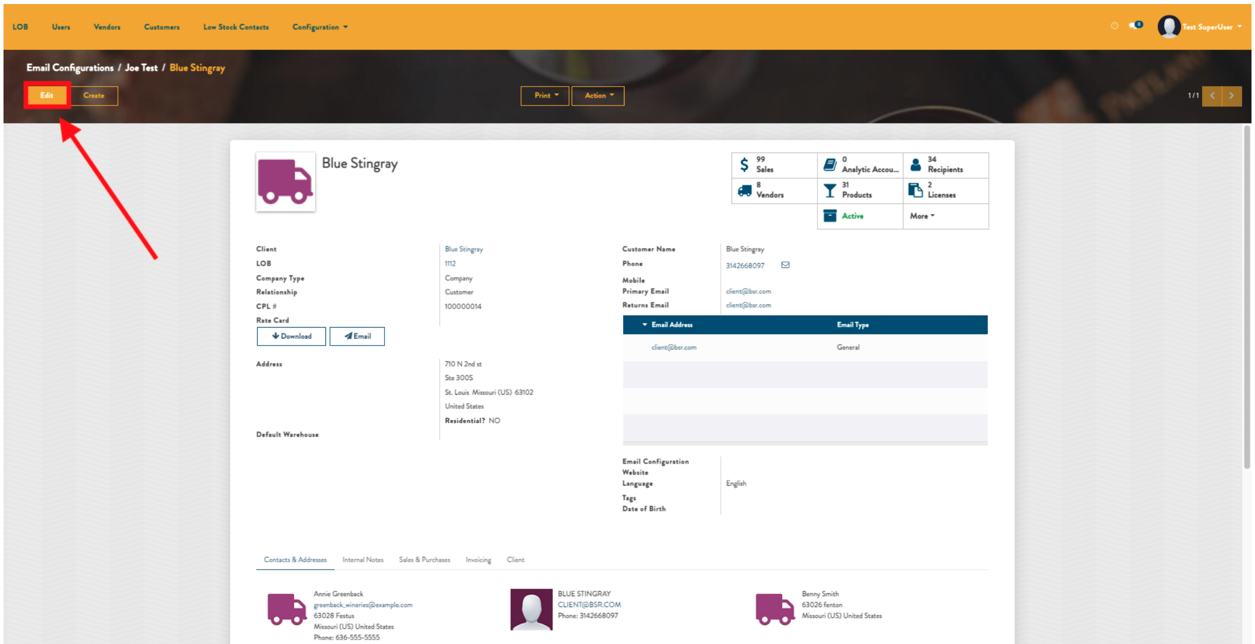
Once an email configuration is created, navigate to the client by clicking their name in the Client field, as shown below:



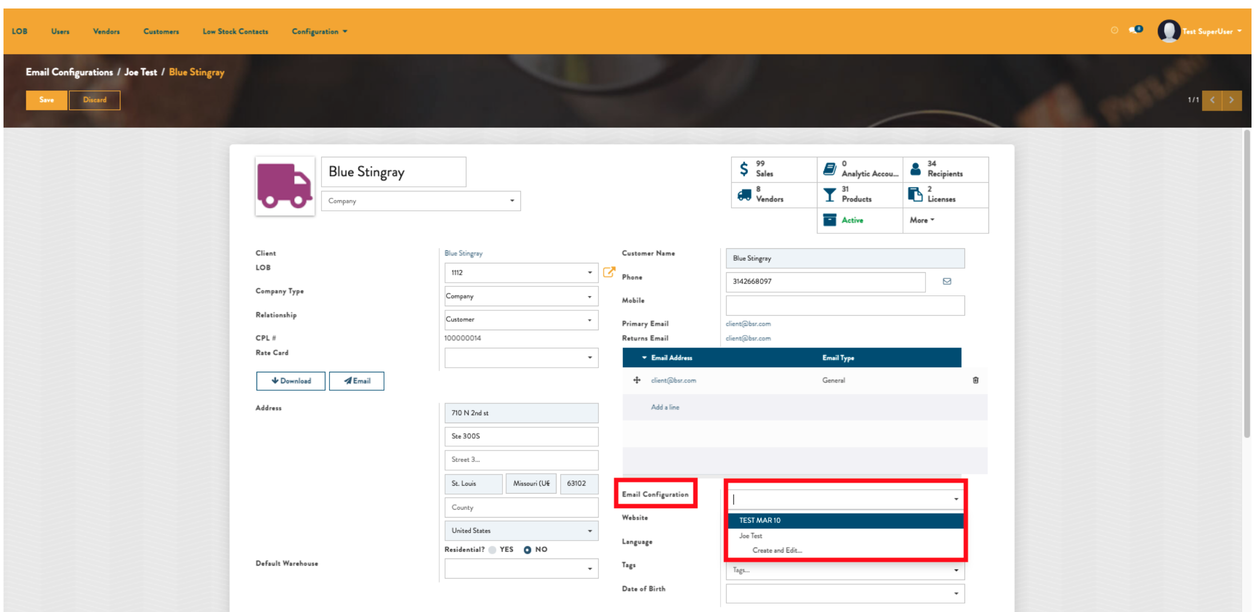
For example clicking Blue Stingray, as noted above, will navigate to the Blue Stingray Client record, as shown below:



From here, click Edit in the upper left corner:



Click the Email Configuration dropdown on the right side of the page. Here, you can view all the existing email configurations that are associated with that Client, you can select an Email Configuration to edit, or Create and Edit a new one.



Email Configurations will not be on individual records. They only appear on client records. To clarify, they will appear on client (winery) records, but not on an employee of a client's individual record.

Automatically Generated Emails

Once an Email Configuration is set for the Client, three automatic emails will be generated.

- **Order Confirmation Email**
  - This is generated by placing an order via the "Enter Single Order" process (found on the Orders menu)
  - This email is sent to the Client and the Client's Customer that was picked for the order
- **Shipment Confirmation Email**
  - This is generated when the order goes into shipped status
  - This email is sent to the Client and the Client's Customer that was picked for the order
- **End of Day Shipping**
  - This report is run at midnight, and then the email is generated for all orders that went into shipped status that day
  - This gets sent to the Client (winery) only

**Note: Multiple email templates can be saved for a Client. For example, you could have holiday based themes and toggle between them depending on the time of year. Those are stored and can be selected and reused whenever.*