

# 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.

#### <u>Users</u>

View a User

#### <u>Vendors</u>

<u>Creating a Vendor</u> <u>Editing a Vendor</u>

#### **Customers**

Creating a Customer Editing a Customer

### Low Stock Contacts

<u>Creating a Low Stock Contact</u> <u>Editing a Low Stock Contact</u>

### **Configuration**

Email History Email Configurations Creating an Email Configuration Selecting an Email Configuration Automatically Generated Emails

# 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:

Users	Vendors	Customers	Low Stock Contacts	Configuration 🔻				0 💶	Cust	omer Training 🔻
Vend	lors				Search					Q
C C	ireate	Import			T Filters T	≡ Group By 🔻	* Favorites	1-5/5	< >	•
E	F Ti N fr	rye's Printing raining Co Vapa, United States ryes@testing.com		7	Riedel USA Training Co Edison, United States		Tr Tr	raining Co aining Co apa, United Stat	tes	
	V Tr A	/alley Wine Warehous raining Co American Canyon, United :	se States		WESTERN WINE SERVCIE Training Co AMERICAN CANYON, United States					

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

Users Vendors Customers	Low Stock Contacts Configuration 🔻		Training Co 🔻 🕐 👤	Customer Training *
Vendors / New Save Discard				Tanan .
Name           Company Name	2			- Active
Client LOB Company Type	Training Co 1113 Company	Phone Mobile •		
Relationship CPL #	Vendor	Email Address	Email Type	
Address	Street Street 2 Street 3 City Californiar Z	Add a line		
	United States Residential? YES NO	•		

## **Editing a Vendor**

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

Users	Vendor	rs Customers Low Stock Con	acts Configurat	ion 🔻			Training Co 🔻	O Customer Training ~
Ver	ndors				Şearch			Q
d.	Create	Import			▼ Filters ▼	≡ Group By ▼ ★ Favorites ▼		1-676 < > 🎫 📰
e	SIE-2	Frye's Printing Training Co Napa, United States fryes@testing.com		June Training Test Training Co St Louis, United States	7	<b>Riedel USA</b> Training Co Edison, United States		Training Co Training Co Napa, United States
		Valley Wine Warehouse Training Co American Canyon, United States		WESTERN WINE SERVCIE Training Co AMERICAN CANYON, United States				

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

Users Vendors Custor	ters Low Stock Contacts	Configuration -			ining Co 👻 🕐 📢	Customer Training *
Vendors / Frye's Printin Edit Create		P	int *			1/6 < >
(FRIB3)	Frye's Printing				Active	
Client		Training Co	Phone	707-253-1114		
LOB		1113	Mobile			
Company Type		Company	Primary Email	fryes@testing.com		
Relationship		Vendor	▼ Email Address	Email Ty	e .	
CPL #		100000390	fryes@testing.com	General		
Address		Napa California (US) 94558				
		United States				
		Residential?				

Click Save to confirm or Discard to cancel.

Users	Vendors Customer	Low Stock Contacts	Configuration 🔻				c₀ • ⊙ <b>≪3</b>	Customer Training 🔻
Vendo Sm	ors / Frye's Printing				-			1/6 < >
	(RIES)	Frye's Printing					• Active	
	Client LOB Company Type		Training Co 1113 Company		Phone Mobile	707-253-1114		
	Relationship CPL #		Vendor 100000390		Primary Email ▼ Email Address	tryes(a)testing.com Email Type		
	Address		1050 Lincoln Ave		💠 fryes@testing.com	General		8
			Street 3		Add a line			
			Napa	California (🕁 94558				
			United States Residential?	res NO	•			
			Residential?	NU NU				

# **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

Users Vendors Customers Low Stock Contacts	Configuration -		Training Co 👻 🕐 🥠	Customer Training *
Customers / New Discard				Partan
Company Name				
Client	Training Co	Customer Name		
LOB	1113	Phone		
Company Type	Individual 👻	M-17		
Relationship	Recipient	Mobile		
CPL #		Primary Email		
Address	Street	Email Address		
	Street 2	Add a line		
	Street 3			
	City State - ZIP			
	United States 👻			
	Residential? YES NO			
		Date of Birth		•

## **Editing a Customer**

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

Users Vendors Customers Low Stock Contr	tets Configuration -		Training Co - 💿 💶 🚺 Customer Training -
Customers		Şearch	Q
Creste		▼ Filters ▼	1-13/13 < > 🎫 🇮
David Brock Phoenix, United States	David Wright Saint Louis, United States bodem@testing.com	Diane Wolff New York, United States dwolff@ytesting.com	Jason Morgan Talahasse, United States JM@testing.com
Joe June TEST Sk Louis, United States	Joe Training Chicago, United States	June Test St. Louis, United States	Peter Kelley San Clemente, United States phelley@testing.com
T3ST St Louis, United States	TEST St. Louis, United States	St Louis, United States	Tom Hanson Atlanta, United States
Tracy Morel New York, United States tmorel@testing.com			

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

Users	Vendors Customers	Low Stock Contacts	Configuration 🔻				Training Co 🔹 💿 📢	Customer Training -
Cus	tomers / TEST	1.0		Print *	]			10 / 13 🔇 🗲
		ST						
-	Client		Training Co		Customer Name	TEST		
	LOB		1113		Phone			
	Company Type		Individual		Mobile			
	Relationship		Recipient		Primary Email			
	CPL #				Email Address			
	Address		1160 Research Blvd					
			St Louis Missouri (US) 63132					
			United States					
			Residentian					
					Date of Birth			

Click Save to confirm or Discard to cancel.

Users	Vendors	Customers	Low Stock Contacts	Configuration -					Training Co 🔻 🔿 📢	Customer Training -
Cust	ave Disc	ST ard				-	2			10/13 🔇 🔪
	I.		EST ompany Name							
	Client			Training Co			Customer Name	TEST		
	LOB			1113			Phase	1201		
	Compa	ny Type		Individual		•	Fnone			
	Relatio	nship		Recipient			Mobile			
	CPL #						Primary Email			
	Addree						✓ Email Adu	fress		
	Auter	•		1160 Research Bh	d		Adda Fac			
				Street 2			Add a line			
				Street 3						
						(0100				
				St Louis	Missouri (U <del>S</del>	63132				
				United States		-				
				Residential?	'ES NO					
							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:

Users V	fendors Customers	Low Stock Contacts	Configuration 🔻					Customer Traini	
Low Sto	ock Contacts	T T		Search					Q
Creat	Import			T Filters -	≡ Group By ▼	★ Favorites ▼	1-1/1	< > <b>=</b> =	
	Megan Boden Training Co St. Louis, United States mboden@testing.com								

## **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

Users Vendors Customers Low Stock Contacts	Configuration 👻		O Customer Training *
Low Stock Contacts / New Save Discard			C. Carlinson
Name			
Client	Training Co	Customer Name	
LOB	1113	Di	
Company Type	Individual 👻	rnone	
Relationship	Low Stock Contact	Mobile	
CPL #		Primary Email	
Address	Company Address:	Email Address	
	Street	Add a line	
	City State - ZIP		
	United States 👻		
	Residential?		

## **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.

Users	Vendors Cust	omers	Low Stock Contacts	Configuration -				Training Co 🔻 🔿 🥠	Customer Training -
Low !	Stock Contacts / <sup>*</sup>	TEST			Print *	]			2/2 🗸 🔪
		TE	ST						
	Client			Training Co		Customer Name	TEST		
	LOB			1113		Phone			
	Company Type	,		Individual		Mobile Brimary Email	ion@bluestingsou com		
	Relationship			Low Stock Contact		Finally Email	Joe(mondestringray.com		
	CPL #					<ul> <li>Email Address</li> </ul>			
	Address			1160 Research Blvd		joe@bluestingray.com	1		
				St Louis Missouri (US) 05152					
				Residential?					

Click Save to confirm or Discard to cancel.

Users	Vendors	Customers	Low Stock Contacts	Configuration 🔻							Training Co 🔹 🕗 🔍	Custor	
Low S	Stock Conta	acts / TEST							2			21	12 < >
			TEST										
	Client			Training Co			Custo	omer N	ame	TECT			
	LOB			1113						IESI			
	Comp	any Type		Individual		•	Phone	e					
	Relati	onship		Low Stock Contact			Mobile						
	CPL #	F					Prima	ary Emi		ine@hluestingray.com			
										Joc(abidesengray.com			
	Addre	\$\$		Company Address:				* Ema	il Address				
				1100 Research BI	va		÷	• joe@	abluestingray.com			8	
				St Louis	Missouri (U <del>S</del>	63132		Add	aliaa				
				United States		•		700	ame				
				Residential?									

# 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:

LOB Users Vendors Custom	ers Low Stock Contacts Configuration *		O 💀 💽 Text SuperUser -
Email History		Search	Q
Create		▼ Filters *	1-62/62 < >
Date .	Subject	Uwr	
05/11/2022 16:09:06	Order Confirmed: 4396.0	OdooBot	c
05/11/2022 15:12:29	Order Confirmed: 4395.0	OdooBot	c
05/11/2022 14:42:14	Order Confirmed: 4394.0	CE Merico	c
05/11/2022 08:38:43	Order Confirmed: 4391.0	OdooBot	c
05/10/2022 14:11:55	Order Confirmed: 4390.0	OdouBot	c
05/06/2022 17:32:37	Order Confirmed: 4236.0	CE Mariles	c
04/28/2022 12:38:16	Order Confirmed: 4379.0	OdooBet	c
04/22/2022 16:58:25	Order Confirmed: 4377.0	OdeoBet	c
04/22/2022 14:18:52	Order Confirmed: 4374.0	OdooBot	c
04/22/2022 14:13:02	Order Confirmed: 4373.0	OdooBot	c
04/22/2022 14:10:15	Order Confirmed: 4372.0	OdouBot	c
04/22/2022 12:14:14	Order Confirmed: 4368.0	OdooBet	c

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:

Date Date	Subject	User		
05/11/2022 16:09:06	Order Confirmed: 4396.0	OdeeBot	4	0

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.

LOB Users Vendors Customer	s Low Stock Contacts Configuration *		O 🕫 🚺 Test SuperUser +
Email History		Sarch	Q
Creste		Action ▼ T Films ▼	1-62/62 < >
Date	Subject	Vesend Emails	
05/11/2022 16:09:06	Order Confirmed: 4396.0	OdooBot	c
05/11/2022 15:12:29	Order Confirmed: 4395.0	OdooBet	c
05/11/2022 14:42:14	Order Confirmed: 4394.0	CE Merlee	c
05/11/2022 08:38:43	Order Confirmed: 4391.0	OdosBot	c
05/10/2022 14:11:55	Order Confirmed: 4390.0	OdooBet	c
05/06/2022 17:32:37	Order Confirmed: 4236.0	CE Marilee	c

## **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:

LOB Users Vendors Customers Low Stock Contacts Cor	nofiguration *		⊙ 🕫 🚺 Test SuperUser +
Email Configurations		Search	Q
		▼ Filters ▼	12/2 < >
Name Name		Client	
TEST MAR 10		Blue Stingray	
Joe Test		Blue Stingray	

This displays the following form:

=	LOB Users Vendors Cust	tomers Low Stock Contacts	Internal Users Configurati	ien *			💿 🔹 🚺 test superuser -
COPPER PEAK Logistics	Email Configurations / New						190 C
G Home	Save Discard						
🔄 Club Scheduler							
🐣 Orders							
Inventory		Name			Logo		
🚑 Customers		Client		-			
Users		Header Color	#F0F0F0				
Reports		Header Text Color	#050505				
Reports		Accent Color	#078cf5				
🔒 іам					Teo Conv		
Q Search					top copy	Thank you for your order.	
ညြ Help					Bottom Copy	Visit www.copperpeaklogistics.com for more information.	
Documents							
		Body					
		Copper Peak Logistic	s			Confidential Information	
						A Message From	
						CLIENT	
				Order Conf	firmed Notification	n	
				Thank yo	ou for your order.		
A 45 2							

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.

≡	LOB Users Vendors Customers	Low Stock Contacts	Internal Users	Configuration -			🔿 🐢 🚺 test superuser -
	Email Configurations / New	Maria Maria					and the second sec
Home	Sare Discard						
Club Scheduler							
🐣 Orders							
P Inventory		Name			Logo		
🚑 Customers		Client			-		
Users		Header Color	#F0F0F0				
Reports		Header Text Color	#050505				
Reports		Accent Color	#078cf5				
👷 іам							
Q Search		1			Top Copy	Thank you for your order.	
D Help					Bottom Copy	Visit www.copperpeaklogistics.com for more information.	
Documents							
		Body					
		Copper Peak Logistic	cs			Confidential Information	
1. State 1.						A Message From	
						CLIENT	
				Order	Confirmed Notification		
N 83				Tha	nk you for your order.	1	

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:

LOB Users Vendors Customers Low Stock	Contacts Configuration -			🗢 🔹 🚺 Test SuperUser -
Email Configurations / New See Decod				The Party and
	None Class Hadar Calar Asses Calar Strate Calar	Tip Cay Batton Cay	Image: Control of the second secon	
	Ord	ler Confirmed Notification		
	Т	hank you for your order.		

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:

LOB Users Vendors Customers Low S	iteri Centres Centremin +	<ul> <li>O Test SuperUser •</li> </ul>
Emsil Configurations / New Seve Discard		Tallan
	Name     Lag       Backer Calar     00000       Backer Calar     00000       Boots     00000       Boots     00000       Backer Calar     00000       Backer Calar     00000       Backer Calar     00000       Backer Calar     00000	
	A Message From CLIENT Order Confirmed N dification Top Copy Test	

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

LOB Users Vendors Customers Low	Stock Contects Configuration -					O 🤷 🚺 Test SuperUser -
Email Configurations / New		-	-			and rates
	Name Client Header Color #0000 Header Text Color #0000	• 0	Logo	<b>A</b>		
	Accest Loop #078cf	5	Top Copy Bottom Copy	Thank you for your order. Bottorn Copy Test		
	Body		$\mathbf{\Sigma}$			
	CLIENT Order #: ORDER	Orde	er Details			
	Order#: Order Date: Ship-to Address:	CUSTOMER ORDER NUMBER DATE CUSTOMER STREET CITY, STATE ZIP	Order Cor CPL Orde Carrier:	firmation Date: r#:	DATE ORDER CARRIER	
	SKU	Description		Qty. QUANTI	ТҮ	
	Bottom Copy Test					

#### 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:

LOB Users Vendors Customers Los	* Stock Contects Configuration *		O 💀 🚺 Test SuperUser -
Emsil Configurations / Joe Test Edit Creste	1000	Axim *	2/2 < >
	Name das Tan Class Bue Segary Header Calar HORD Header Tana Calar Access Calar	Lepe Tap Capy The bays for your and of the said.	
	Body	Betten: Cepy Vait www.capperpubliquida.com for more information.	
	Copper Peak Logistics	Confidential Information	
		A Message From CLIENT	
		Order Confirmed Notification	
		Thank you for your order of the world's best wine.	
	CLIENT Order #: ORDER		

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

LOB Users Vendors Customers Low Stock (	Contacts Configuration -							💿 🔹 🚺 Test Supe	
Email Configurations / Jos Test / Blue Stingray		Print * Action *	-	Ø., -	_		1	10	: >
	Blue Stingray			\$ 99 Sales E Vendors	0 Analytic Accou T <sup>31</sup> Products	A Recipients Licenses More -			
	Client LOB Company Type Relationship CRI =	Blue Stingray 1112 Company Customer	Customer Name Phone Mobile Primary Email Returns Email	Blue Stingray 3142668097 🖸 client@bsr.com					
	Rate Card Download	710 N 2nd st	Emsil Address client@bsr.com		Email Type General				
	Default Warehouse	se suus Se. Luuis Missouri (US) 63102 Unide Satte Residential? NO							
			Email Configuration Website Language Taga Date of Birth	English					
	Contacts & Addresses Internal Notes Sales & Pu	rohases Invoicing Client							
	Annis Greenback greenback, winereis@example.com 63028 Fentus Missour (US) United States Phone: 636-555-5555	BLUE STINGRAY CLIENT[@BSR.CC Phone: 314266809	DM 97	Ben 630 Miss	ny Smith 126 fenton souri (US) United States				

From here, click Edit in the upper left corner:

LOB Users Vendors Customers Low Stock	Contacts Configuration -					
Email Configurations / Joe Test / Blue Stingray		Print - Action	•			
	Blue Stingray			\$ 99 Sales	<ul> <li><sup>0</sup> Analytic Accou</li> <li><sup>31</sup> Products</li> <li>Active</li> </ul>	<ul> <li>34 Recipients</li> <li>2 Licenses</li> <li>More -</li> </ul>
N	Client LOB Company Type Relationship CPL # Rate Card	Blue Stingrey 112 Company Cutomer 100000014	Customer Name Phone Mobile Primary Email Returns Email Z Email Address	Blue Stingray 3142668097 🗹 client@bsr.com client@bsr.com	Email Type	, 
	↓ Dennlosd AEmail	710 N 2nd st Se: 3005 Sc. Looin Missouri (US) 63102 Unived States Residential? NO	client@bsr.com		General	
Defect Wer	Default Warehouse		Email Configuration Website Language Tags Date of Birth	English		
	Contacts & Addresses Internal Nation Safes & Puter Contacts & Addresses Internal National Systems (Contact) America Contact Contact Manager (COL) Under Grant Manager (COL) Under (COL) Under (COL) Under (COL	ndaaa Inniing Client	, DM 97	Be GS Ma	nny Smith 026 fecton socuri (US) United States	

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.

LOB Users Vendors Customers Low Stock Cor	ntacts Configuration *						O 🔹 🚺 Test SuperUser -
Emsil Configurations / Joe Test / Blue Stingray			-	1			u C S
	Blue Stingray Company	•		\$ 99 Sales	O     Analytic Accou     Y     J1     Products     Active	<ul> <li>34 Recipients</li> <li>2 Licenses</li> <li>More •</li> </ul>	
	Client LOB Company Type	Blue Stingray	Customer Name Phone	Blue Stingray 3142668097			
	Relationship CPL # Rate Card	Customer - 100000014	Mobile Primary Email Returns Email	client@bsr.com client@bsr.com	Envil Tope		
	◆ Download		+ client@bsr.com		General		8
	Address Defesit Werkhaus	70 N 2afst Se 3005 Sens 3 Sk. Innin Masser (1):K 63102 Consty United States Residential? VES () NO	Add a line Email Configuration Website Longrage Tags	TEST MAR 10 Joe Test Create and Edit_	_		
			Date of Birth	lags		•	

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.