

# CopperLink Documents Support Documentation

For Copper Peak



The following documentation addresses the functionality under the Documents menu in the CopperLink system. Monthly reports are generated on your behalf and stored under the Documents section. <u>Reports</u>

<u>Search</u>

**Download** 

<u>Views</u>

# **Documents**

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



On your Customer View, you can View All documents. This is the default view, as shown below:

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DIRECTORY All Invoicing	Q Documents Test.xls • test 06/22/2022	ų.	Q product_template (2).xls • test 06/22/2022	ųr
CATEGORY Training Co 4	Q test invoice • test 06/22/2022	Ąp.	Q test compliance report 6.7.22 • test 06/22/2022	ų

### **Reports**

By clicking the drop down arrow to the right of Client, the following reports can be viewed:

- Inventory Status Report
- Compliance Report
- Perpetual Inventory Report
- Invoices

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Client Inventory Status Report Compliance Report Perpetual Inventory Report Invoices	Q test invoice • test 06/22/2022	ţţ	Q test compliance report 6.7.22 • test 06/22/2022
CATEGORY Training Co 4			

## Search

Specific reports can be found by using the Search bar at the top of the page. For example, type "Compliance" and hit enter, and only compliance reports will be shown.



To show all reports, click the "x" to the right of "Compliance" in the Search.

### Download

Clicking the 3 dots on the right of a card will allow you to download it.



### Views

While Kanban View is the default, List View is also available via the button below:

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Filename	Last Updated on	Category	Path	
Documents Test.xls	06/07/2022 11:00:51	Training Co	Client/Compliance Report/Documents Test.xls	
product_template (2).xls	06/07/2022 09:00:17	Training Co	Client/product_template (2).xls	
test invoice	06/07/2022 09:06:23	Training Co	Client/Invoices/test invoice	
test compliance report 6.7.22	06/07/2022 09:30:15	Training Co	Client/Compliance Report/test compliance report 6.7.22	