



CopperLink General Functions Support Documentation

For Copper Peak Logistics



This documentation will address general functions and processes that are universal across the CopperLink system, and that apply to several different menus and functions.

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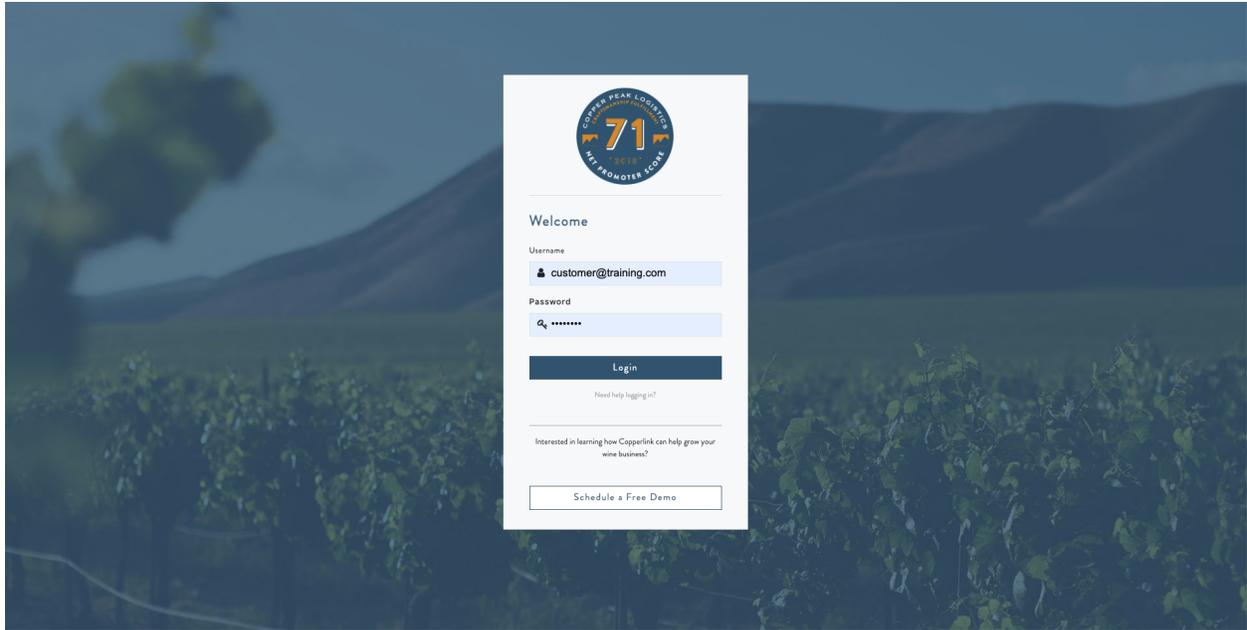
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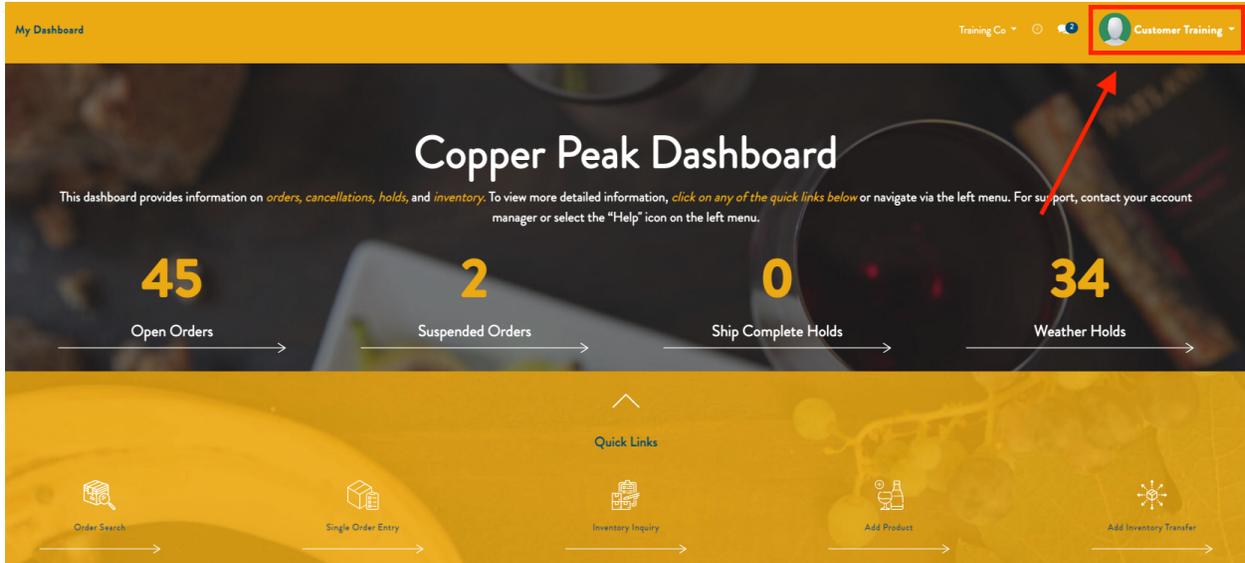
Login

With your Username and Password, log in to your account at <https://copperlink.bluestingray.com/>.

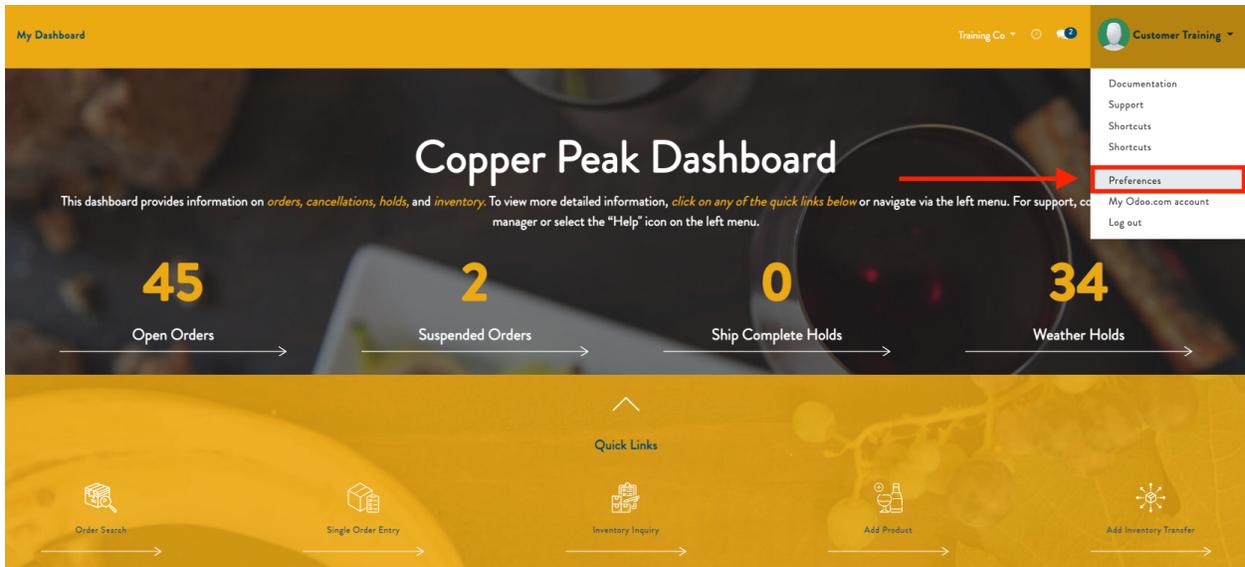


Change Password

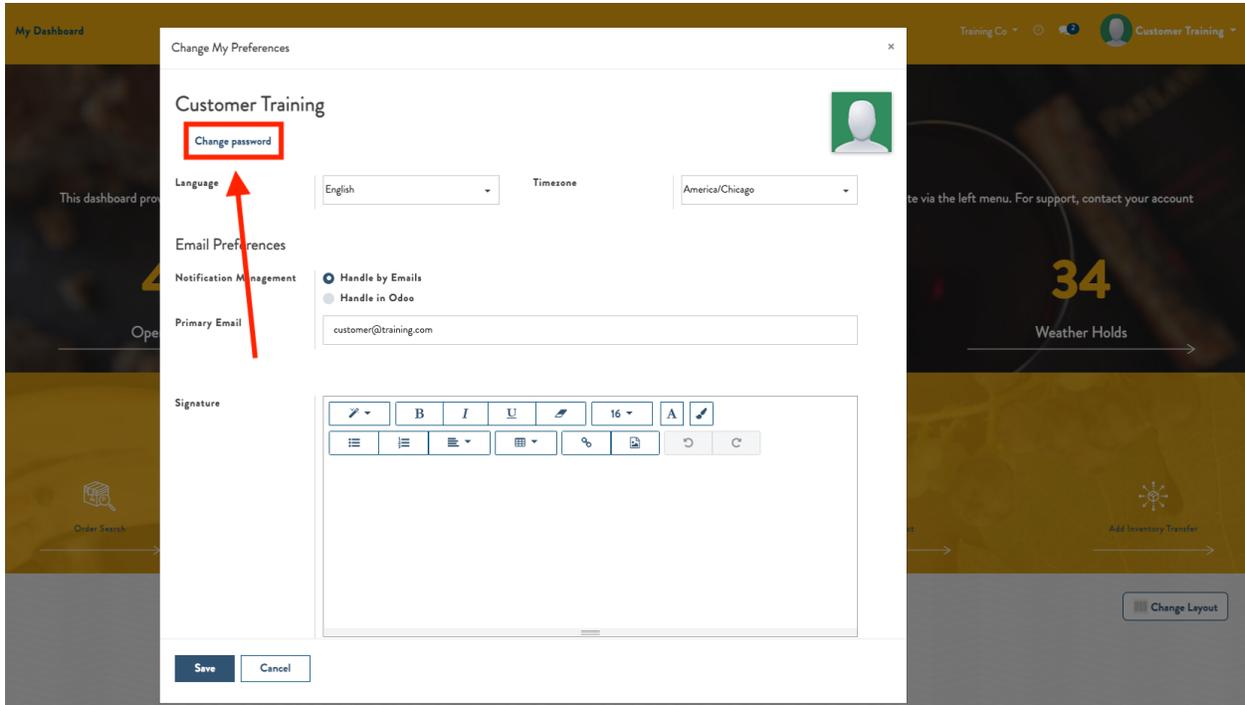
To change your password, click on your user account in the upper right corner, as shown here:



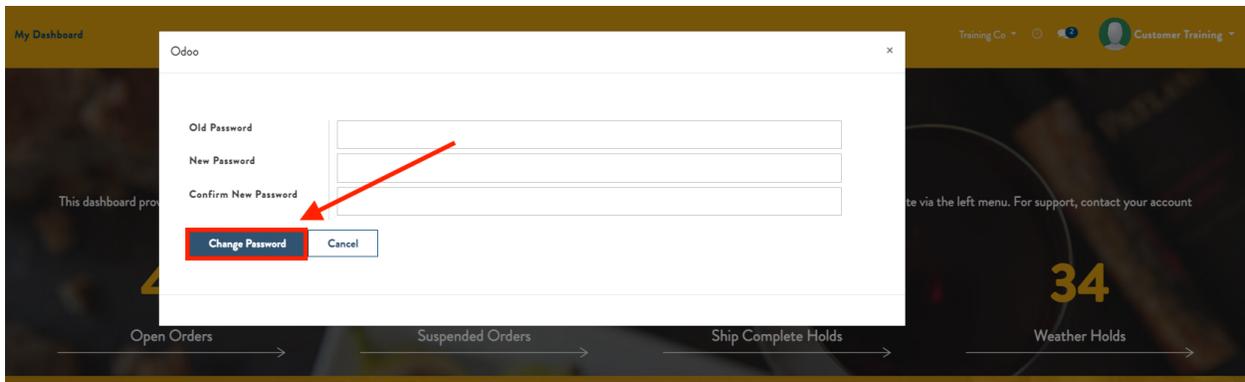
Next, select Preferences from the drop down menu.



On the following screen click Change password.

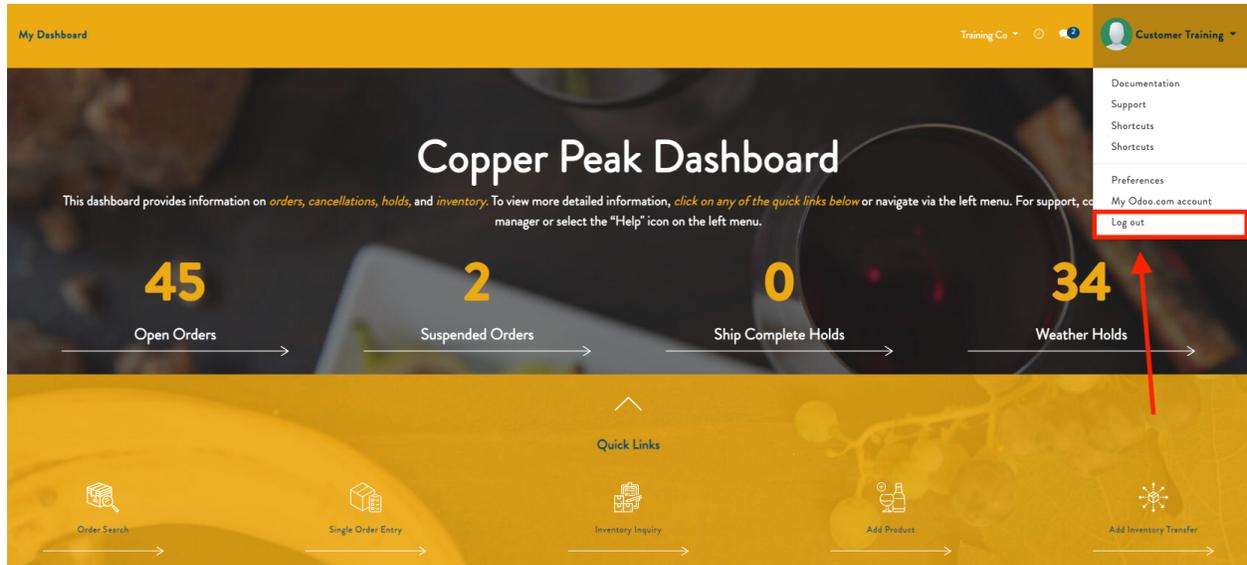


Enter your Old Password, your New Password and Confirm New Password. Click Change Password to confirm or Cancel to abandon the changes.



Log out

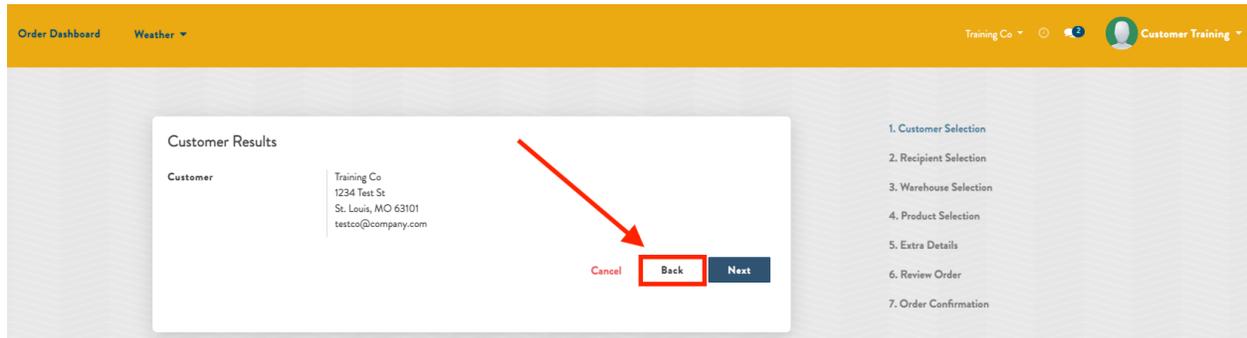
You can log out from any menu. To do so, click the drop down menu to the right of your account in the upper right corner and select log out as shown below:



Navigation

Back Button

When navigating in CopperLink, use the Back button on any page, like the example in the Orders menu below, as opposed to clicking the Back button in the web browser.



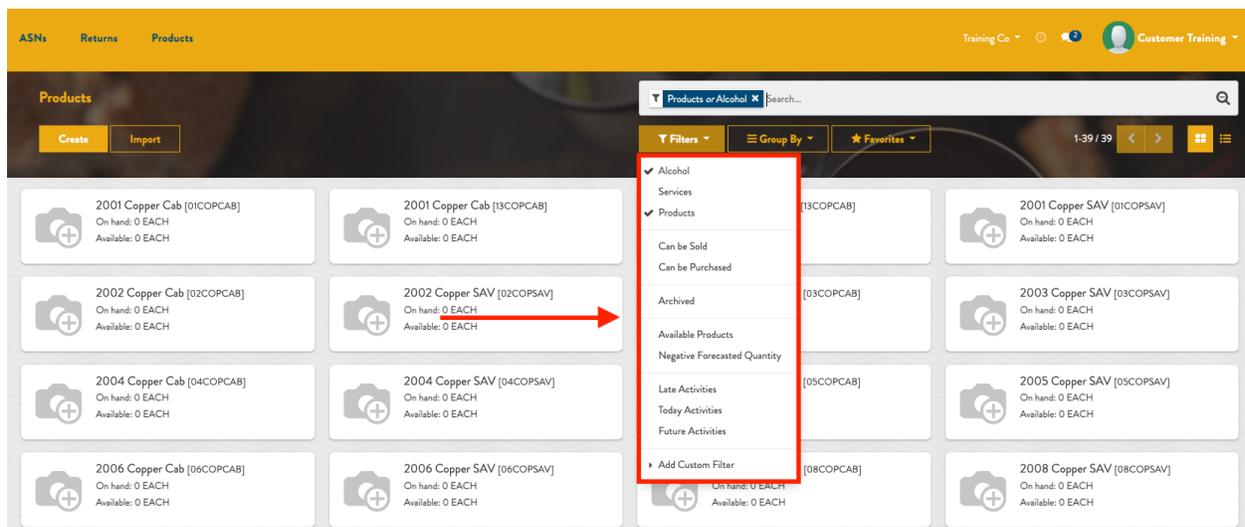
Filters / Group By / Favorites

The options for Filter, Group By and Favorites are available from many menus throughout the CopperLink system, and exist so data can be viewed in a variety of ways customized to the needs of the specific user.

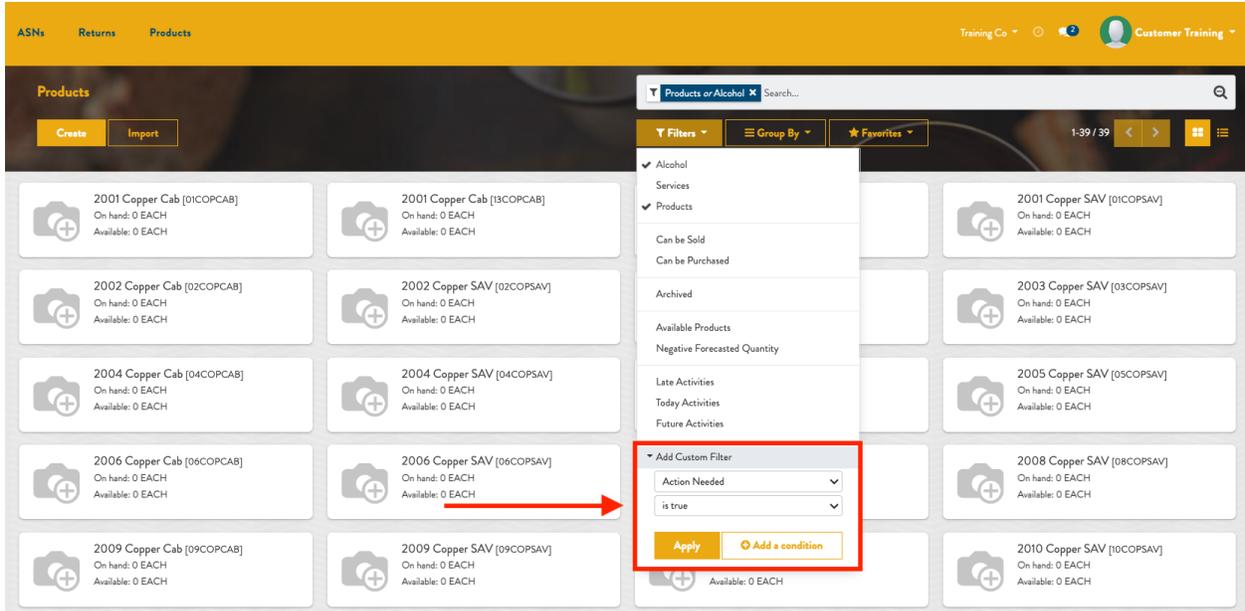
Filters

Filters refine data to a specific set of information, and can be applied individually or in combination with other filters. Filters will only show desired records that pass the filter requirements. For example, imagine playing the board game Guess Who? Filtering would be like putting down all the cards that don't have a mustache so you only see the cards of people that do have a mustache. From any menu, click the Filters drop down located in the upper right of the screen. Select one or more filters and they will be applied to the current menu being viewed.

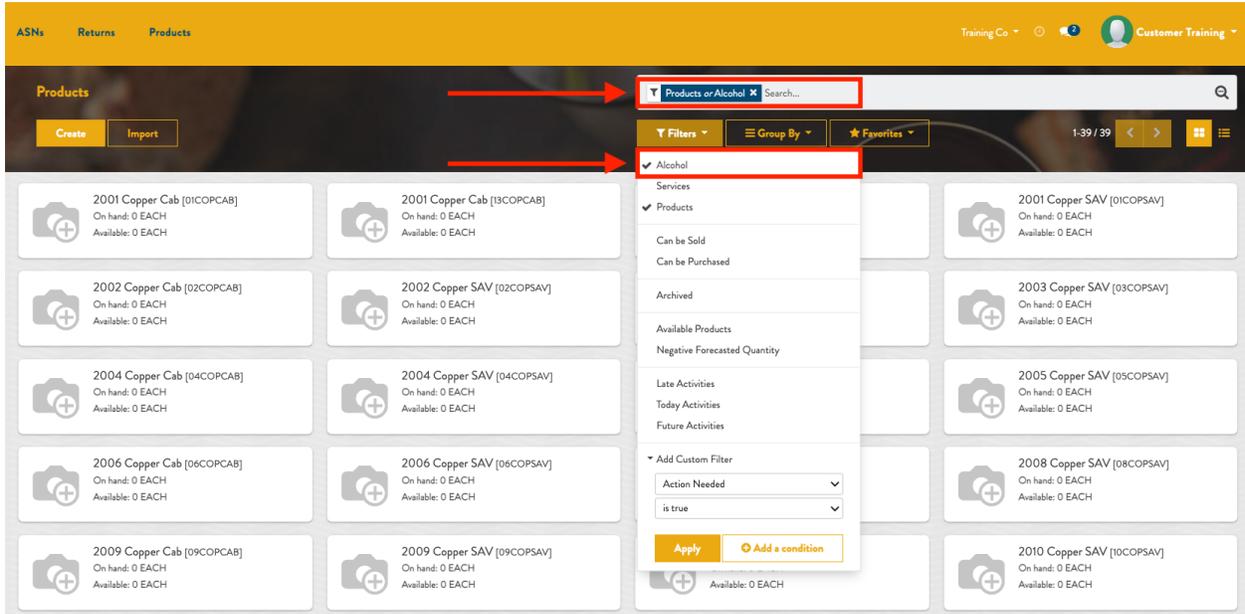
Below is an example of Filters under the Products Menu. Note that you will see a checkmark to the left of all Products that are Alcohol, and those words will appear in the search bar above the menu as well.



Custom Filters can be created as well by choosing that option and the parameters, and clicking Apply, as shown below:



To remove a filter, click the filter (with the checkmark) again from the drop down menu, or click the “x” beside the filter in the search bar at the top right of the screen, as shown below:

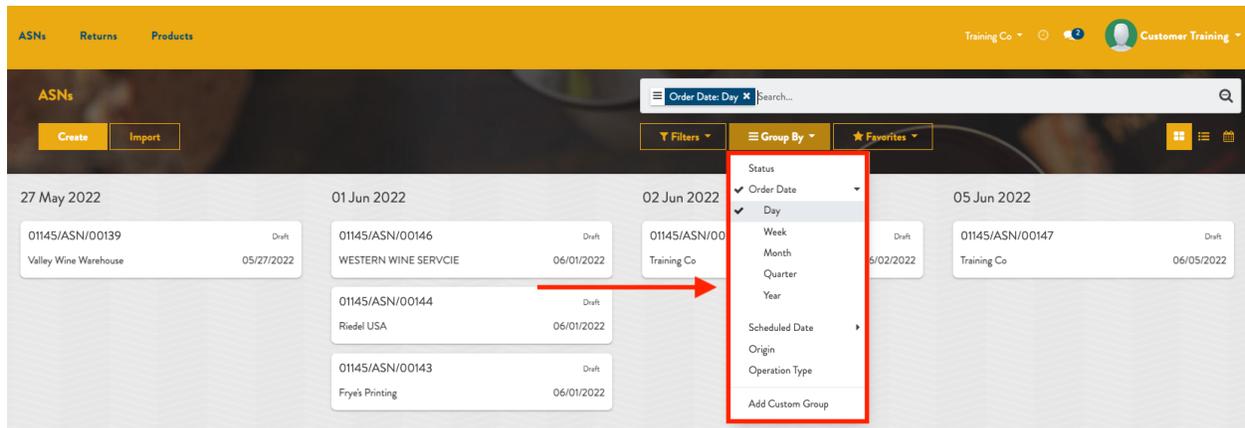


Group By

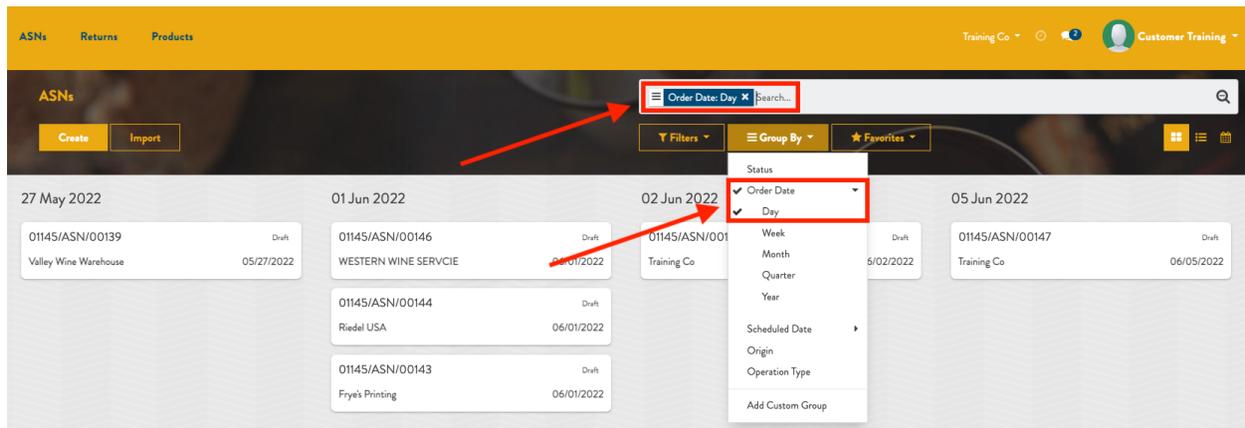
Group By will separate and group records by the attribute you want to differentiate the groups by. For example, imagine that you have a deck of cards and someone

told you to group by suit. You would have clubs in one stack, spades in another, hearts in another and diamonds in another. You still have all the cards in the deck because you didn't filter any out, simply organized by group. Now let's say you're then asked to filter the cards to exclude face cards. Now you will have one stack of each suit with only numbered cards. The Group By drop down menu is located to the right of the Filters drop down, in the upper right corner of many menus throughout CopperLink.

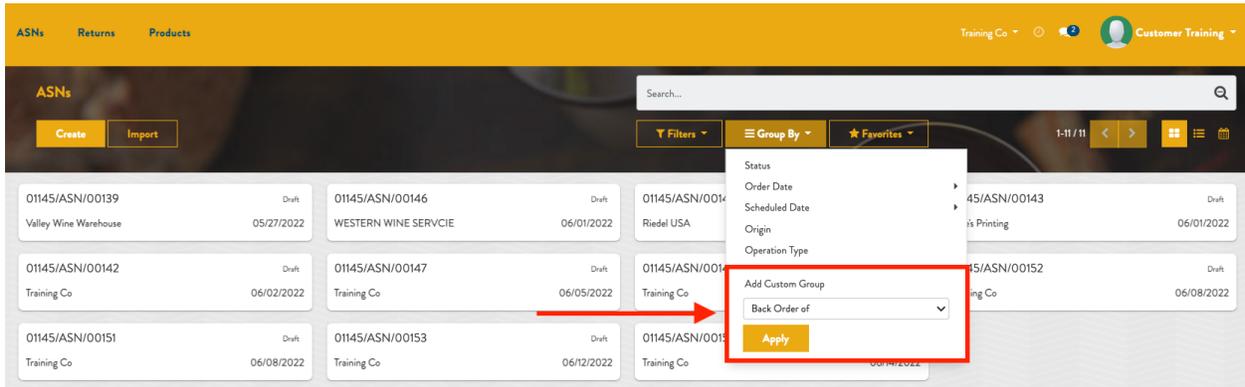
Below is an example of grouping ASNs (Advanced Shipping Notices) by Order Date > Day. Like with Filters, check marks appear to the left of Order Date and Day in the drop down, and those words appear in the search bar above.



To clear the Group By parameters, either click them again in the drop down menu, or click the "x" in the search bar as shown below:

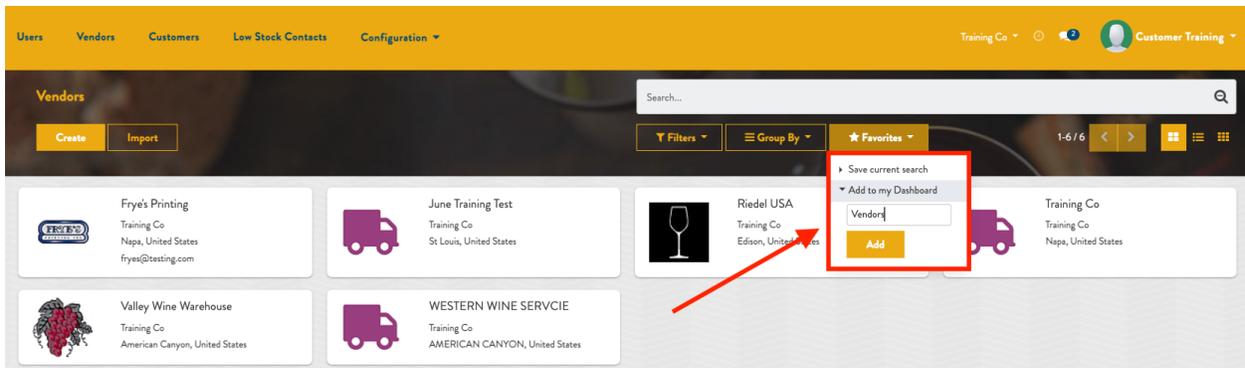


To create a custom group, make your selection from the custom group drop down menu and click Apply as shown here:

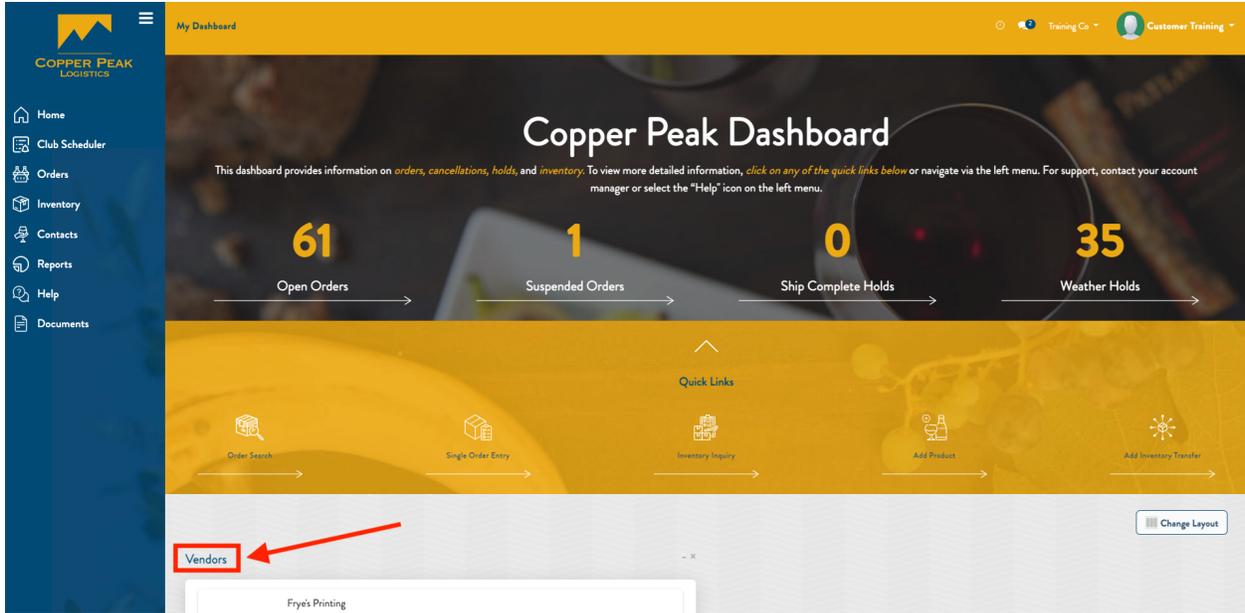


Favorites

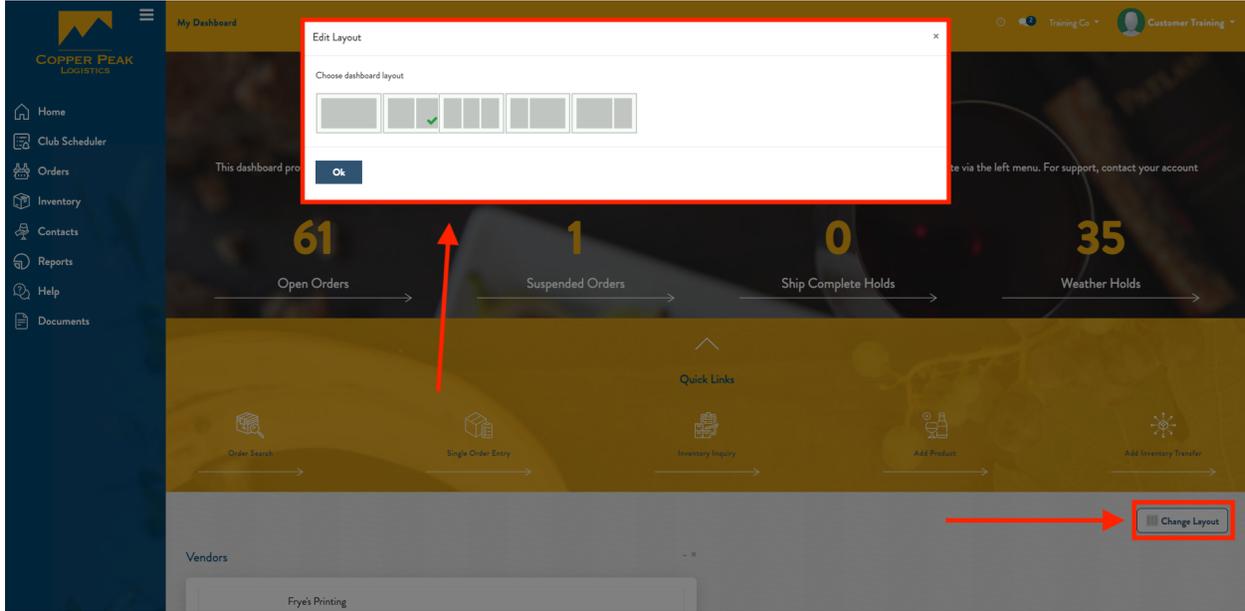
Favorites help to streamline navigation in the CopperLink system, and provide quick access to the pieces you use the most. Favorites can save a specific search result, and can be added to the Home Dashboard. In the example below, the Vendors menu can be saved and added to the Home Dashboard by clicking the corresponding options. The name can be edited so it makes most sense to the specific user. Click Add to add this Favorite to your home dashboard.



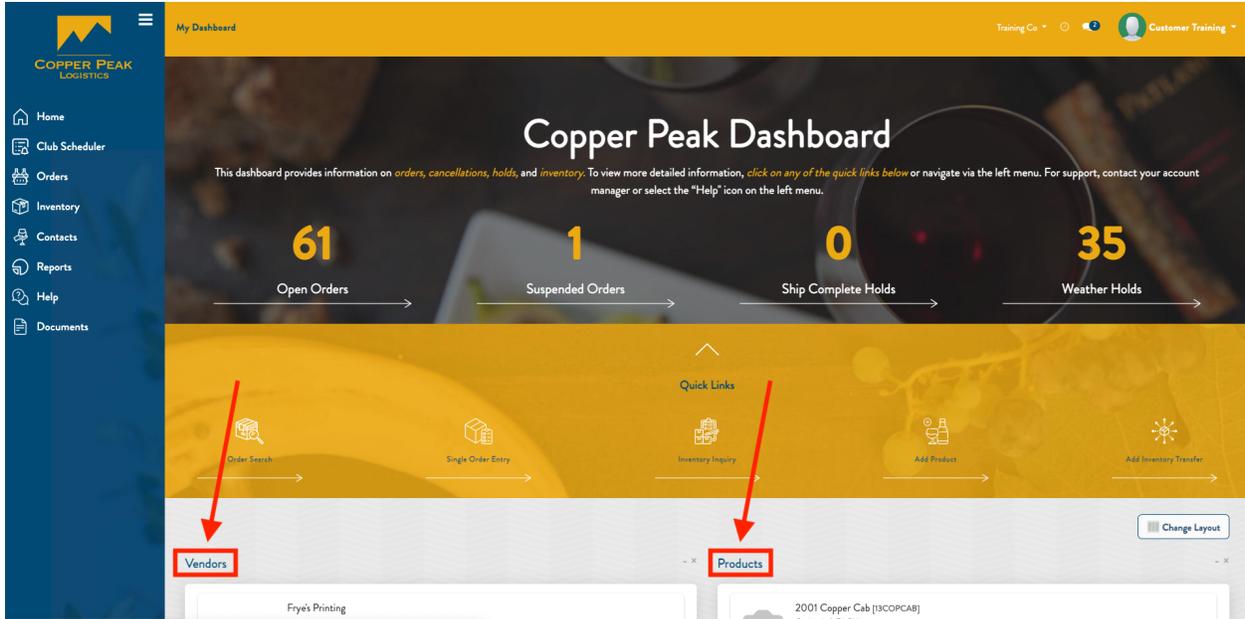
Notice the Vendors just saved above are now available on the Home Dashboard. If multiple menus have been saved to the Dashboard, the most recent additions will appear at the top.



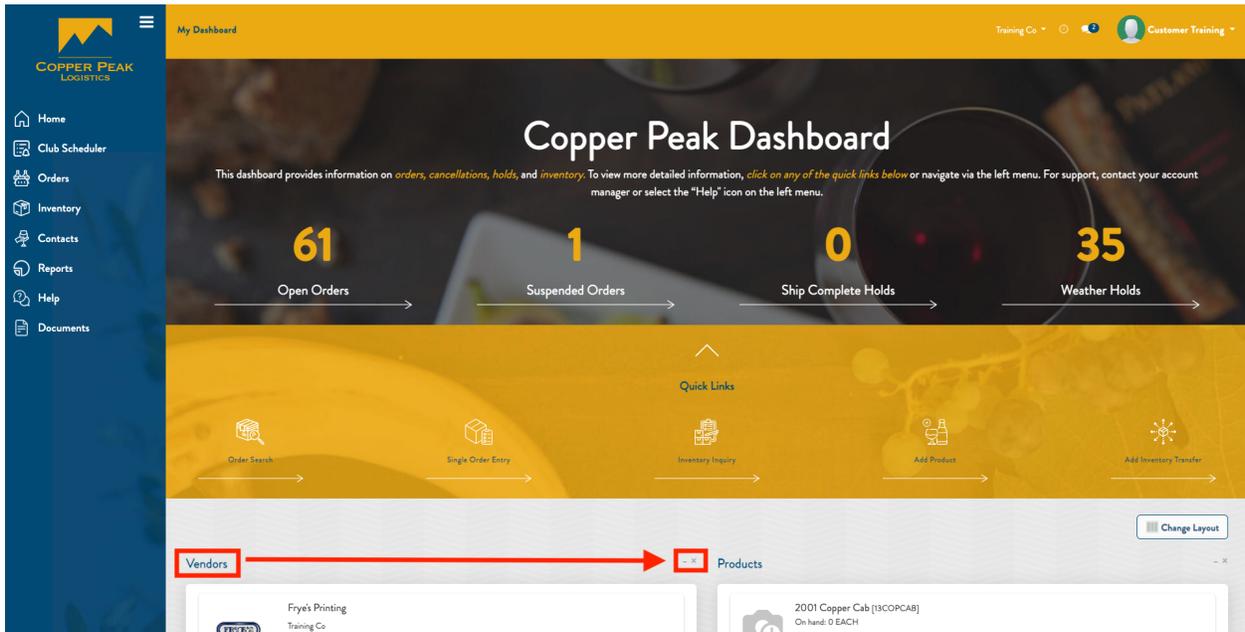
To rearrange the format of the Home Dashboard, click the Change Layout button and select the new layout, as shown below:



Notice how the layout changed, by clicking two columns from the options above.



To remove a Favorite, click the “x” to the upper right corner of the Favorite you wish to remove, as shown below:



Favorites can also be reordered on the Home Dashboard by clicking and dragging on the one(s) you'd like to move.

Viewing Options

The CopperLink system offers different viewing options for most pages, menus and screens that you will use. Oftentimes a combination of the various menus below will be provided, depending on which menu you're on. We will provide an example of each of the following below. The different viewing options include:

- List
- Kanban
 - The kanban view is a kanban board visualization: it displays records as “cards”, halfway between a list view and a non-editable form view. Records may be grouped in columns for use in workflow visualization or manipulation (e.g. tasks or work-progress management), or ungrouped (used simply to visualize records).
- Calendar
 - Calendar views display records as events in a daily, weekly or monthly calendar.
- Pivot
 - The pivot view is used to visualize aggregations as a pivot table.
- Graph
 - The graph view is used to visualize aggregations over a number of records or record groups.
- Activity
 - The Activity view is used to display the activities linked to the records. The data are displayed in a chart with the records forming the rows and the activity types the columns. When clicking on a cell, a detailed description of all activities of the same type for the record is displayed.

List View

List View displays all items in a list, as shown below. To use the List View, click the corresponding icon in the upper right corner of the screen.

<input type="checkbox"/>	SKU	Name	Cost	Product Category	Internal Product Type	Quantity On Hand	Quantity Available	Unit of Measure
<input type="checkbox"/>	+ 01COPCAB	2001 Copper Cab	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 13COPCAB	2001 Copper Cab	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 13COPCAB	2001 Copper Cab	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 01COPSAV	2001 Copper SAV	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 02COPCAB	2002 Copper Cab	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 02COPSAV	2002 Copper SAV	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 03COPCAB	2003 Copper Cab	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 03COPSAV	2003 Copper SAV	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH
<input type="checkbox"/>	+ 04COPCAB	2004 Copper Cab	0.00	All / ALCOHOL (Training Co, Major)	Storable Product	0	0	EACH

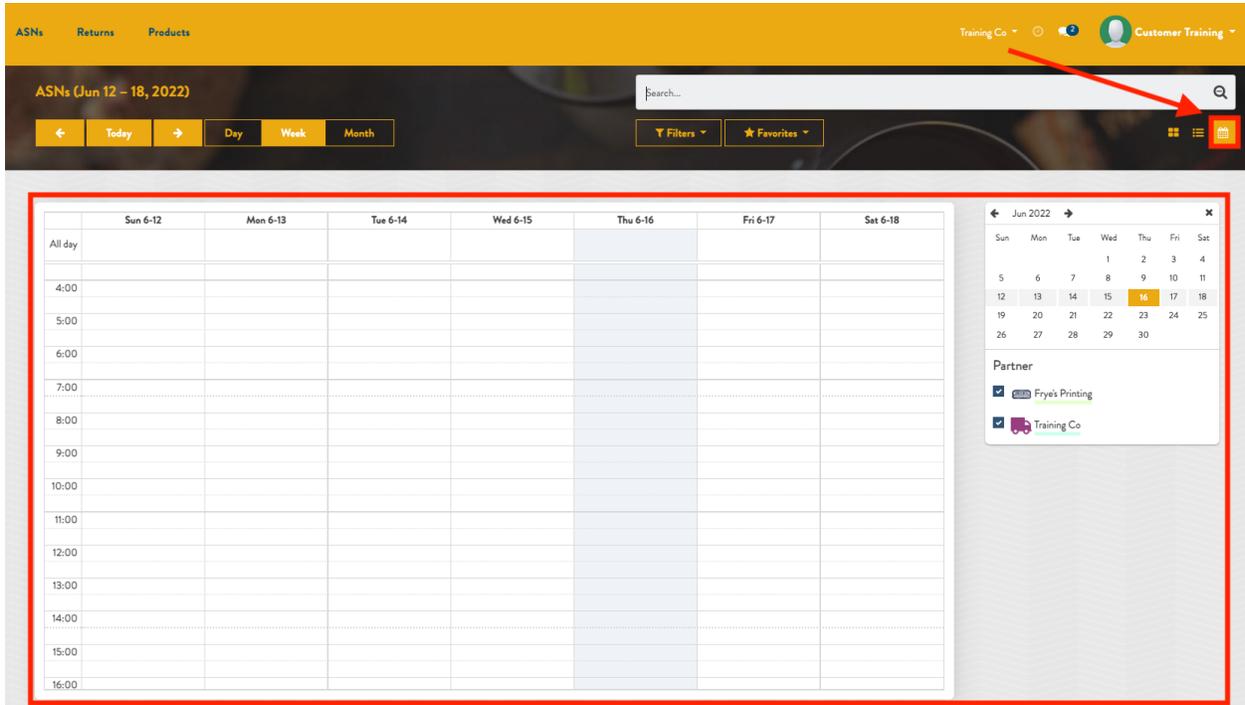
Kanban View

Kanban View displays all items as cards on a board, as shown below. To use the Kanban View, click the corresponding icon in the upper right corner of the screen.

2001 Copper Cab [01COPCAB] On hand: 0 EACH Available: 0 EACH	2001 Copper Cab [13COPCAB] On hand: 0 EACH Available: 0 EACH	2001 Copper Cab [13COPCAB] On hand: 0 EACH Available: 0 EACH	2001 Copper SAV [01COPSAV] On hand: 0 EACH Available: 0 EACH
2002 Copper Cab [02COPCAB] On hand: 0 EACH Available: 0 EACH	2002 Copper SAV [02COPSAV] On hand: 0 EACH Available: 0 EACH	2003 Copper Cab [03COPCAB] On hand: 0 EACH Available: 0 EACH	2003 Copper SAV [03COPSAV] On hand: 0 EACH Available: 0 EACH
2004 Copper Cab [04COPCAB] On hand: 0 EACH Available: 0 EACH	2004 Copper SAV [04COPSAV] On hand: 0 EACH Available: 0 EACH	2005 Copper Cab [05COPCAB] On hand: 0 EACH Available: 0 EACH	2005 Copper SAV [05COPSAV] On hand: 0 EACH Available: 0 EACH

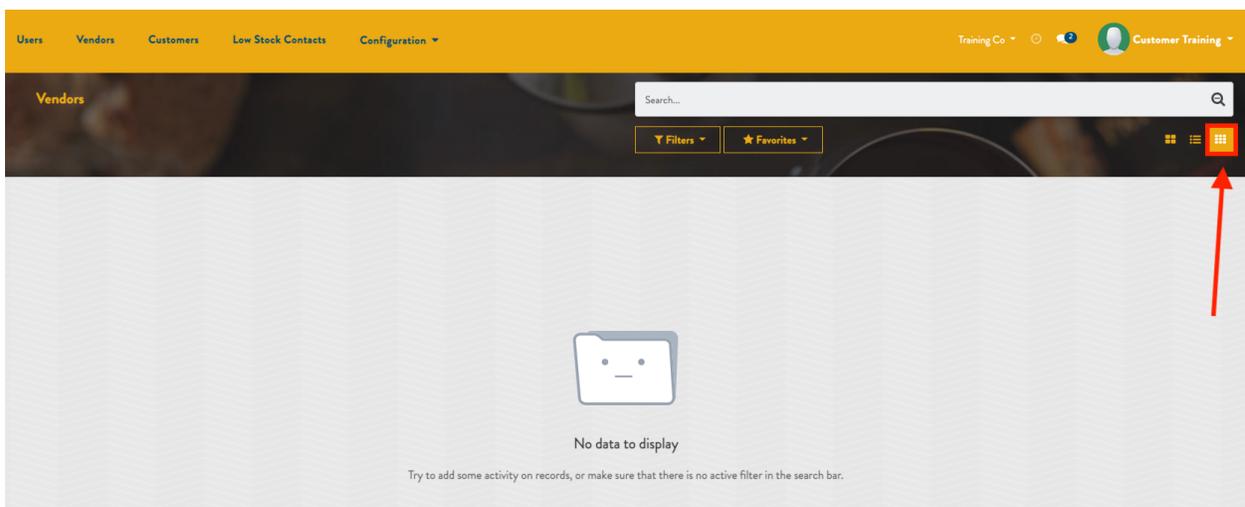
Calendar View

Calendar View displays all items on a calendar, as shown below. Calendar View can be set to view the current day, week or month. To use the Calendar View, click the corresponding icon in the upper right corner of the screen.



Activity View

The Activity View is used to display the activities linked to the records. The data is displayed in a chart with the records forming the rows and the activity types the columns. When clicking on a cell, a detailed description of all activities of the same type for the record are displayed. To use the Activity View, click the corresponding icon in the upper right corner of the screen.



Terms & Definitions

LOB

Line of Business (Company name or account number)