

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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Login

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



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.

My Dashboard	Change My Preferences	×	Training Co * 📀 🥵 🚺 Customer Training *
This dashboard prov	Customer Trainin Change password Language Email Prefurences Notification M nagement	g English Timesone America/Chicago -	te via the left menu. For support, contact your account 34 .
Оре	Primary Email	customer@training.com	Weather Holds
Code State	Signature		Ald Instantion
	Save Cancel		

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

My Dashboard	Odeo C	Training Co 👻 🔍 Custom	er Training 🔻
This dashboard prov	Old Password New Password Confirm New Password Cancel Cancel	te via the left menu. For support, contact your acc	ount
Ope	n Orders Suspended Orders Ship Complete Holds	→ Weather Holds	\rightarrow

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.

Customer Results 1. Customer Selection Customer Training Co 1234 Test St St. Louis, MO 63101 testco@company.com 3. Warehouse Selection Cancel Back Next End 6. Review Order 0. Order Confirmation	Order Dashboard Weather 👻			Training Co 👻 💿 🔍 Customer Training 👻
	Customer Results Customer	Training Co 123 Heat St St. Louit, MO G3101 tester@company.com	Back Next	1. Customer Selection 2. Recipient Selection 3. Warehouse Selection 4. Product Selection 5. Extra Details 6. Review Order 7. Order Confirmation

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:

ASNs Returns Products			Training Co 🔹 💿 🔹 💽 Customer Training *
Products		Y Products or Alcohol X Search	Q
Create		▼ Filters ▼	1-39/39 < > 🏥 🗮
		✓ Alcohol	
2001 Copper Cab [01COPCAB] On hand: 0 EACH	2001 Copper Cab [13COPCAB] On hand: 0 EACH	Services ✔ Products	2001 Copper SAV [01COPSAV] On hand: 0 EACH
Available: 0 EACH	Available: 0 EACH	Can be Sold	Available: 0 EACH
2002 Copper Cab [02COPCAB]	2002 Copper SAV [02COPSAV]		2003 Copper SAV [03COPSAV]
On hand: 0 EACH	On hand: 0 EACH	Archived	On hand: 0 EACH
Available: U EACH	Available: 0 EACH	Available Products Negative Forecasted Quantity	Available: 0 EACH
2004 Copper Cab [04COPCAB]	2004 Copper SAV [04COPSAV]	Late Activities	2005 Copper SAV [05COPSAV]
On hand: 0 EACH Available: 0 EACH	On hand: 0 EACH Available: 0 EACH	Today Activities	On hand: 0 EACH Available: 0 EACH
		Future Activities	
2006 Copper Cab [06COPCAB]	2006 Copper SAV [06COPSAV]	▼ Add Custom Filter	2008 Copper SAV [08COPSAV]
On hand: 0 EACH Aveilable: 0 EACH	On hand: 0 EACH Avsilable: 0 EACH	Action Needed 🗸	On hand: 0 EACH Available: 0 EACH
		is true 🗸	
2009 Copper Cab [09COPCAB]	2009 Copper SAV [09COPSAV]	Apply O Add a condition	2010 Copper SAV [10COPSAV]
On hand: 0 EACH Available: 0 EACH	On hand: 0 EACH Avsilable: 0 EACH	Available: 0 EACH	On hand: 0 EACH Available: 0 EACH

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.

ASNs Returns Products							Training Co 👻 🔿 📢	Customer Training -
ASNs				Crder Date: D	ay 🗙 Search			Q
Create Import				▼ Filters ▼	≡Group By ▼	★ Favorites ▼		<mark></mark> ≡
27 May 2022		01 Jun 2022		02 Jun 2022	Status ✓ Order Date ✓ Day	•	05 Jun 2022	
01145/ASN/00139	Draft	01145/ASN/00146	Draft	01145/ASN/00	Week	Draft	01145/ASN/00147	Draft
Valley Wine Warehouse	05/27/2022	WESTERN WINE SERVCIE	06/01/2022	Training Co	Month	6/02/2022	Training Co	06/05/2022
		01145/ASN/00144	Draft		Year			
		Riedel USA	06/01/2022		Scheduled Date	•		
		01145/ASN/00143	Draft		Origin Operation Type			
		Frye's Printing	06/01/2022		Add Custom Group			

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:

ASNs Returns	Products						Training Co 🝷 🕐 📢	Customer Training *
ASNs				Order Date: D	y X Search			ର୍
Create	ort			▼ Filters ▼	≡ Group By ▼	★ Favorites ▼		<mark>∷</mark> ≔ @
27 May 2022		01 Jun 2022		02 Jun 2022	 ✓ Order Date ✓ Day 	*	05 Jun 2022	
01145/ASN/00139	Draft	01145/ASN/00146	Draft	01145/ASN/001	Week	Draft	01145/ASN/00147	Draft
Valley Wine Warehouse	05/27/2022	WESTERN WINE SERVCIE	00/01/2022	Training Co	Month	6/02/2022	Training Co	06/05/2022
		01145/ASN/00144	Draft		Year			
		Riedel USA	06/01/2022		Scheduled Date	•		
		01145/ASN/00143	Draft		Origin Operation Type			
		Pryes Printing	06/01/2022		Add Custom Group			

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

ASNs Returns Products							Training Co 👻 📀	Customer Training *
ASN ₅				Search				ର୍
Creato				▼ Filters ▼	≡ Group By →	★ Favorites ▼		1-11/11 < > 😑 🚍 🎬
					Status			
01145/ASN/00139	Draft	01145/ASN/00146	Draft	01145/ASN/0014	Order Date Scheduled Date		45/ASN/00143	Draft
Valley Wine Warehouse	05/27/2022	WESTERN WINE SERVCIE	06/01/2022	Riedel USA	Origin		i's Printing	06/01/2022
					Operation Type			
01145/ASN/00142	Draft	01145/ASN/00147	Draft	01145/ASN/0014	Add Custom Group		15/ASN/00152	Draft
Training Co	06/02/2022	Training Co	06/05/2022	Training Co	Back Order of	~	ing Co	06/08/2022
01145/ASN/00151	Draft	01145/ASN/00153	Draft	01145/ASN/001	Apply			
Training Co	06/08/2022	Training Co	06/12/2022	Training Co		00/14/2022		

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:

≡	My Dashboard Edit Lay	out		⊙ 📢 Tra	ining Co 👻 🚺 Customer Training 👻
COPPER PEAK LOGISTICS	Choose d	lashboard layout			
G Home					
Club Scheduler					
A Orders	This dashboard pro <mark>Ok</mark>			te via the left menu. For	support, contact your account
Inventory					
Gontacts	61	A 1		0	25
Reports		· · · · ·			
段 Help	Open Orders	s Suspended O	rders Ship Co	omplete Holds	Weather Holds
Documents					STATISTICS STATISTICS
			Quick Links		
	6				
	CIQ.				
					Change Layout
	Vendors				
	Frye's Printing				

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

=	My Dashboard				Training Co * 💿 🔹 🚺 Customer Training *
COPPER PEAK LOGISTICS	CONTRACTOR OF				and all the
Home		Copper F	Peak Das	hboard	
Ero' Club Scheduler	This dashboard provides information on orders,	cancellations, holds, and inventory. To view more de	etailed information, <i>click on a</i>	any of the quick links below or navigate via the	e left menu. For support, contact your account
Inventory		manager of set		it menu.	
Gentacts	61	1 1		0	35
Reports	Orus Orden	5			Week Malda
R Help	Open Orders	Suspended Orders	\rightarrow —		
Documents			<u> </u>		Contraction of the
			Quick Links		
	tin 🕄			9 <u>4</u>	
	Order Search	Single Order Entry	Inventory Inquiry	Add Product	Add Inventory Transfer
	\rightarrow .	\rightarrow	**************************************		
	+		+		Change Layout
	Vendors		- × Products		- X
N 12 -	Frye's Printing			2001 Copper Cab [13COPCAB]	

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

■	My Dashboard				• 💿 🔹 🚺 Customer Training *
COPER PEAK Locience Club Scheduler 쓸 Orders 한 Inventory 윤 Contacts 당 Reports	This dashboard provides information on or 61	Coppe ders, cancellations, holds, and inventory: To via man	er Peak Dashl w more detailed information, <i>click on any of</i> ager or select the "Help" icon on the left met	board F the guick fifts below or navigate via the left menu. nu.	For support, contact your account
② Help 금 Documents	Open Orders	Suspended Ord	ers Ship (Complete Holds	Weather Holds
-3	Grine Same	Single Order Enzy	Encoder of the second s	AM Product	Add Inventory Transfer
1.27	Vendors Frye's Printing Training Co		Products 200 00	DI Copper Cab (I3COPCAB) and 0 EACH	- ×

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.

ASNs	Re	eturns Product				Training (Co 👻 🔍 Customer Training
Pro	ducts				Products × Search		Q
	Create	192			▼ Filters ▼	★ Favorites ▼	1-39/39 < > 📰 📰
					• /	/	
]	SKU	Name	Cost Product Category	Internal Product Type	Quantity On Hand	Quantity Available Unit of Measure
]	O1COPCAB	2001 Copper Cab	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
]	13COPCAB	2001 Copper Cab	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
]	13COPCAB	2001 Copper Cab	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
]	O1COPSAV	2001 Copper SAV	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
] •	O2COPCAB	2002 Copper Cab	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
] ·	O2COPSAV	2002 Copper SAV	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
]	• 03COPCAB	2003 Copper Cab	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
]	O3COPSAV	2003 Copper SAV	0.00 All / ALCOHOL (Training Co, Major)	Storable Product	0	0 EACH
] •	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.

ASNs Returns Products			Training Co 🔹 📀 🧟 💽 Customer Training *
Products		Y Products × Search	Q
Create		▼ Filters ▼	1-39/39 🔨 🚬 🖽
2001 Copper Cab (0ICOPCAB)	2001 Copper Cab [I3COPCAB]	2001 Copper Cab [I3COPCAB]	2001 Copper SAV [DICOPSAV]
On hand: 0 EACH			
Available: 0 EACH	Available: 0 EACH	Available: 0 EACH	Available: 0 EACH
2002 Copper Cab (02COPCAB)	2002 Copper SAV [02COPSAV]	2003 Copper Cab [03COPCAB]	2003 Copper SAV [03COPSAV]
On hand: 0 EACH			
Available: 0 EACH	Available: 0 EACH	Available: 0 EACH	Available: 0 EACH
2004 Copper Ceb (04COPCAB)	2004 Copper SAV [04COPSAV]	2005 Copper Cab (05COPCAB)	2005 Copper SAV [05COPSAV]
On hand: 0 EACH			
Available: 0 EACH	Available: 0 EACH	Available: 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.

	(Jun 12 – 18, 2022)					Şearch						
÷	Today 🔶	Day Week	Month		▼ Filters ▼	★ Favorites ▼				Ľ		:
	Sun 6-12	Mon 6-13	Tue 6-14	Wed 6-15	Thu 6-16	Fri 6-17	Sat 6-18	← Jut	n 2022 🔸			
All day								Sun	Mon T	ie Wed	Thu	Fri
								5	6 3	8	9	10
4:00								12	13 1	4 15	16	17
5:00								19	20 2	1 22	23	24
6:00								26	2/ 2	8 29	30	
								Partn	er			
7:00									🖪 Frye's Pri	nting		
8:00								Image: 1	Training C	0		
9:00												
40.00												
10:00												
11:00												
12:00												
12.00												
13:00												

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.



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Line of Business (Company name or account number)