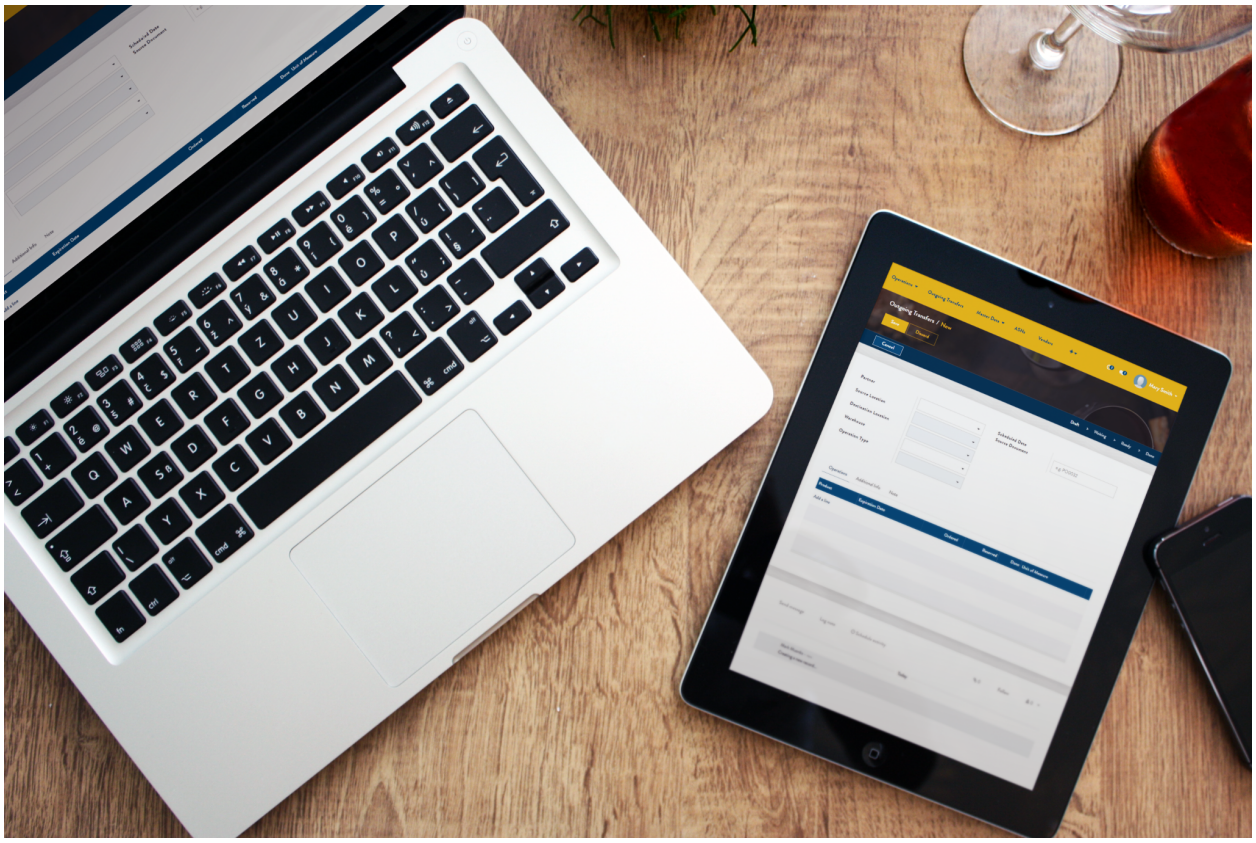
COPPER PEAK
LOGISTICS

CopperLink Inventory Support Documentation

For Copper Peak



The following documentation covers the functionality under the Inventory menu from the Main Menu panel. It will cover Advanced Shipping Notifications (ASNs) - which are inventory transfers, Returns and Products.

Inventory

Advanced Shipping Notifications (ASNs)

- Creating an ASN
- Importing an ASN

Returns

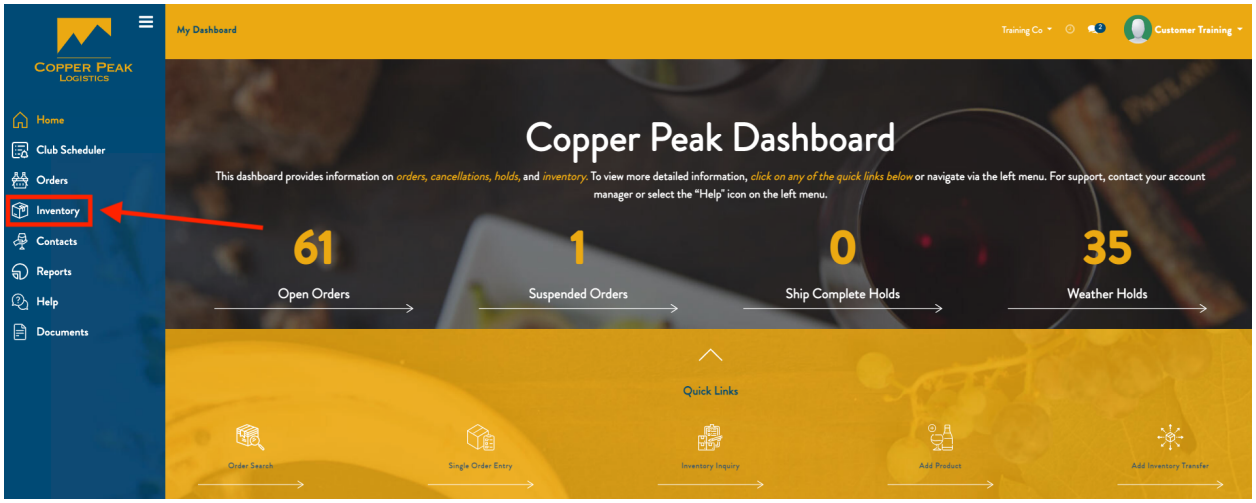
- Specify Action
  - Reship
  - Return to Stock
  - Damaged in Transit
- Edit

Products

- Creating Product
- Importing a Product

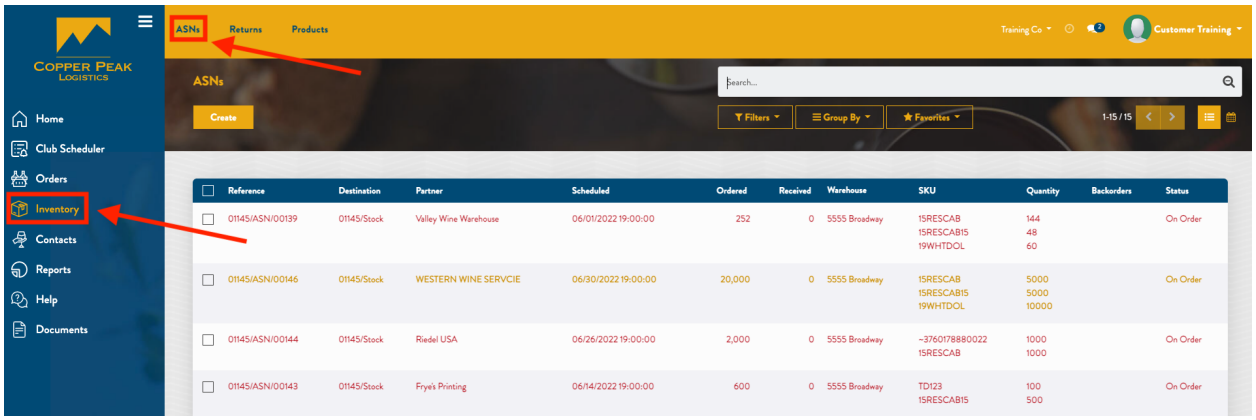
Inventory

Once logged in, select Inventory from the Main Menu on the left side of the page as shown below:



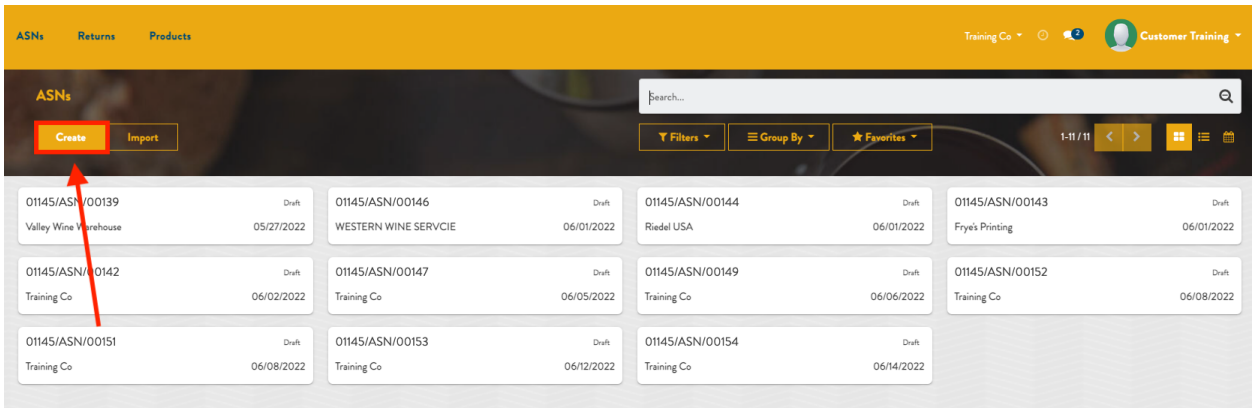
Advanced Shipping Notifications (ASNs)

An ASN is for transferring goods to Copper Peak, to be received into inventory. An ASN is the transfer of goods from one place to the next. From the Inventory menu on the left, select ASNs from the yellow menu bar at the top of the page. This provides a list of all ASNs, as shown below:

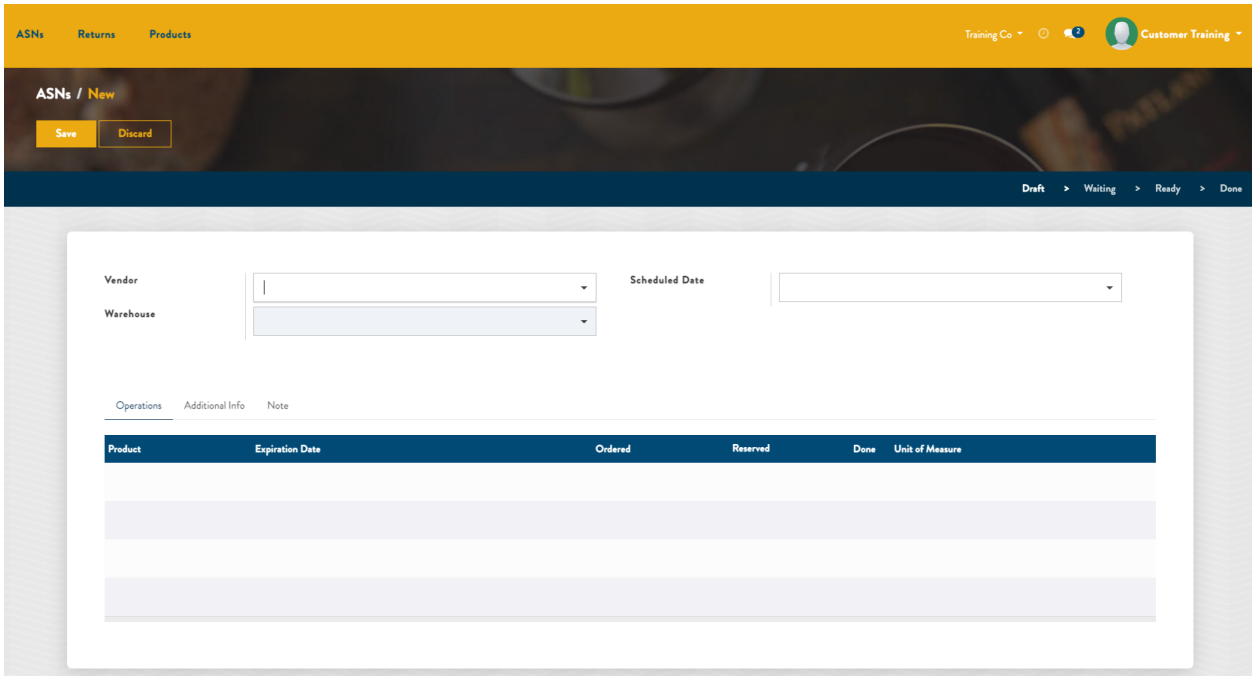


Creating an ASN

To create a new ASN click Create in the upper left corner, as shown here:

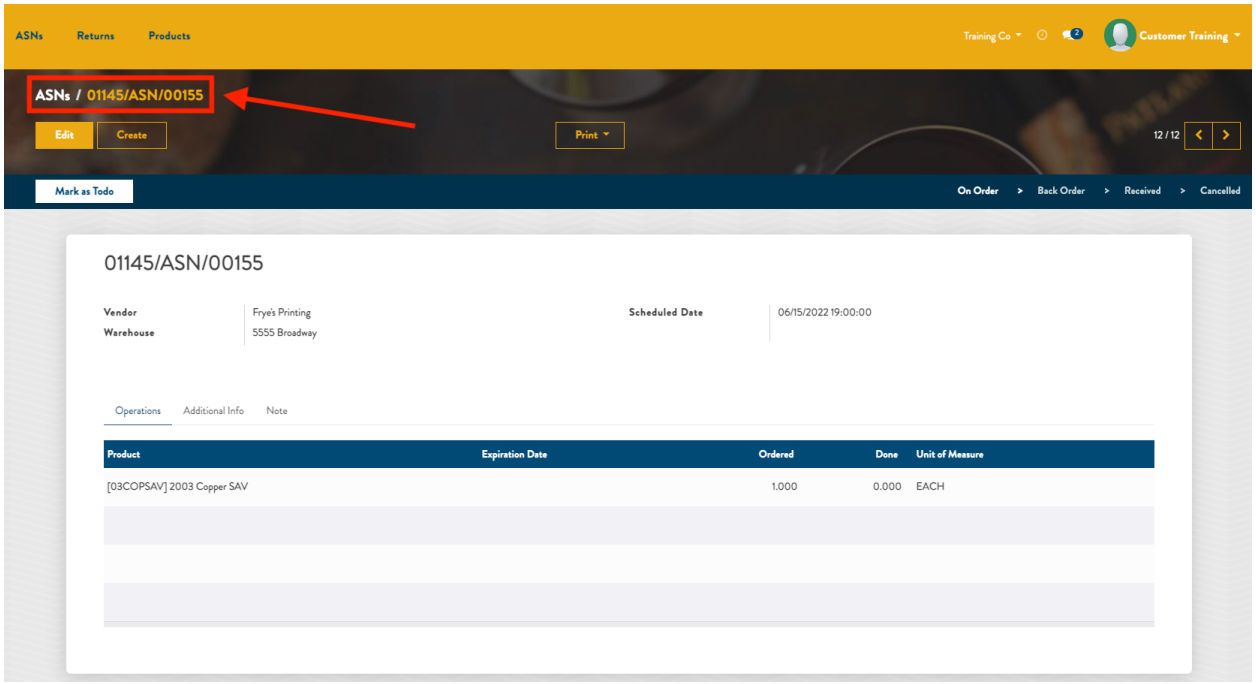


The following screen will appear:

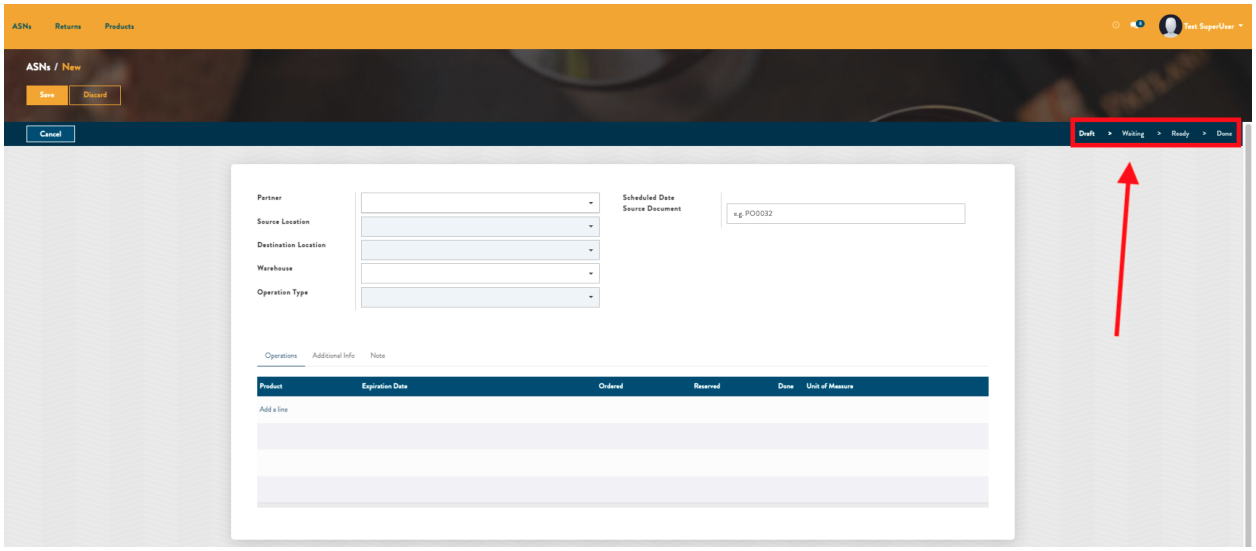


- Select a Vendor. If the desired Vendor is not available in the drop down menu, you will need to go to ontact to create prior to creating an ASN.
- Select desired Warehouse
- Select a Scheduled Date
- Add Product by clicking on “Add a line” in the table. Select sku and qty. Unit of measure will default to “each”.

When all fields are complete, click Save to confirm or Discard to abandon the changes. If discarding changes, you will be directed back to the ASNs main page. If saving, follow the breadcrumbs back to the ASNs main page, by clicking “ASNs” as shown below:



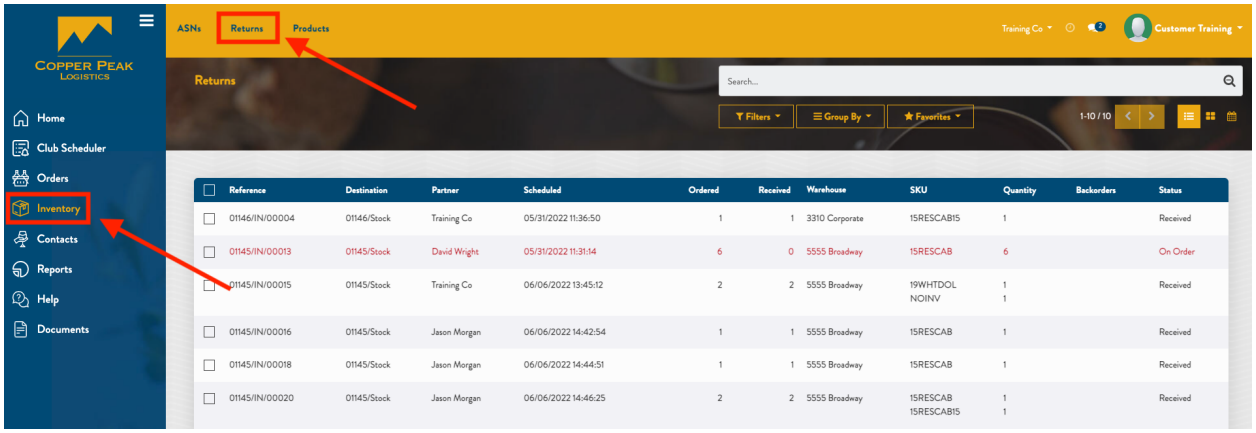
The following statuses denote the ASN's current state:



- Ready
- Done

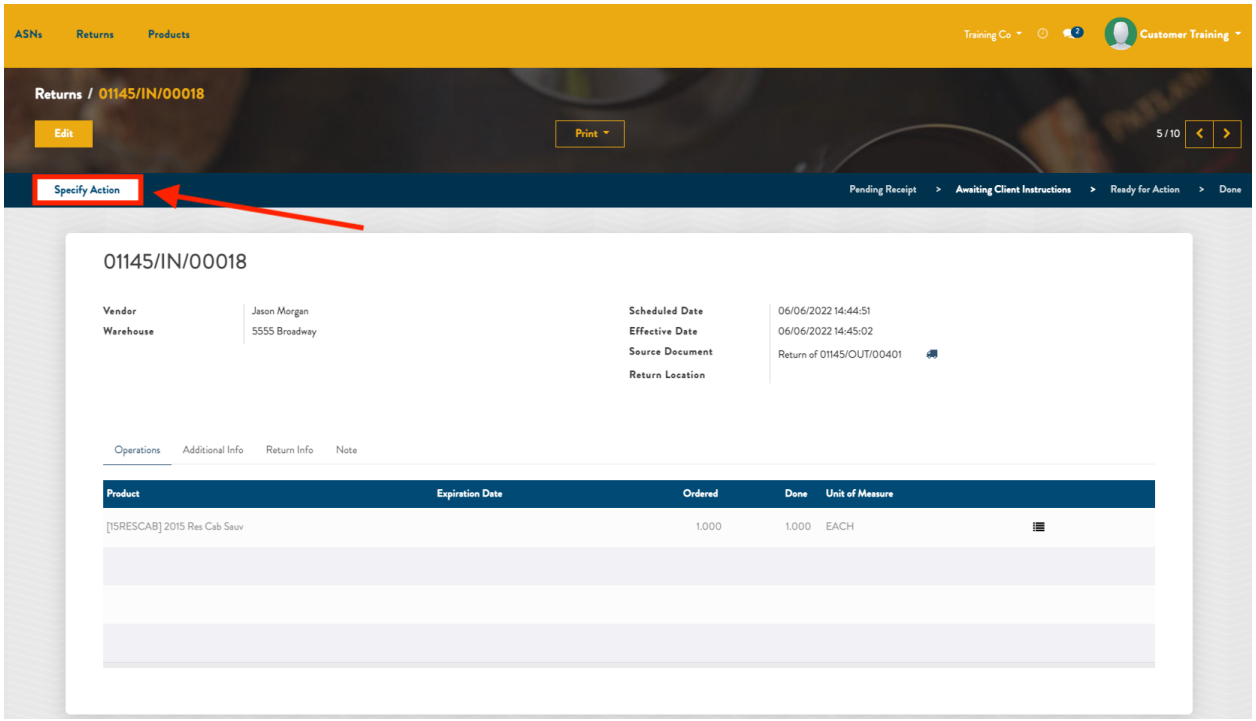
Returns

From the Inventory menu on the left, select Returns from the yellow menu bar at the top of the page. This provides a list of all Returns, as shown below:



Specify Action

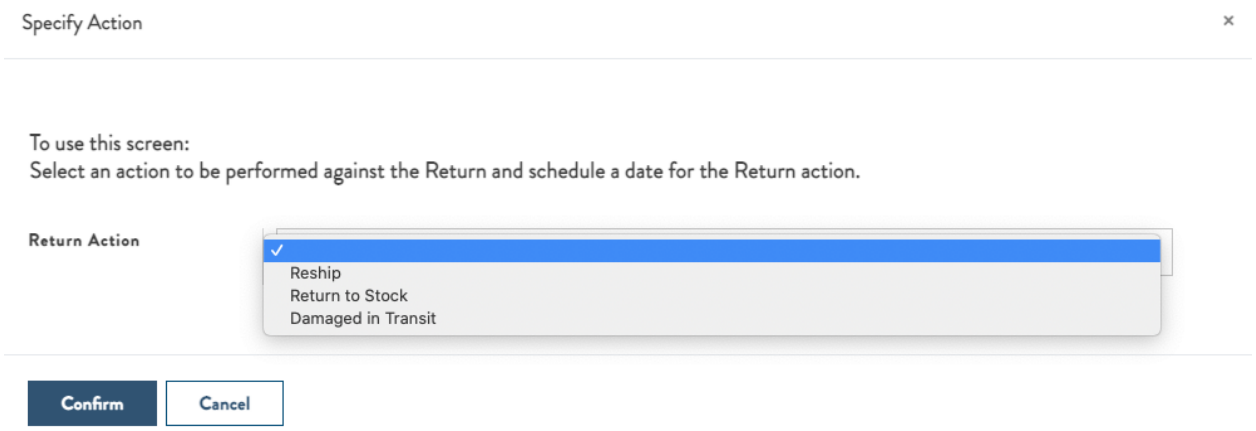
Click on any line item and then click Specify Action.



Select the Return Action

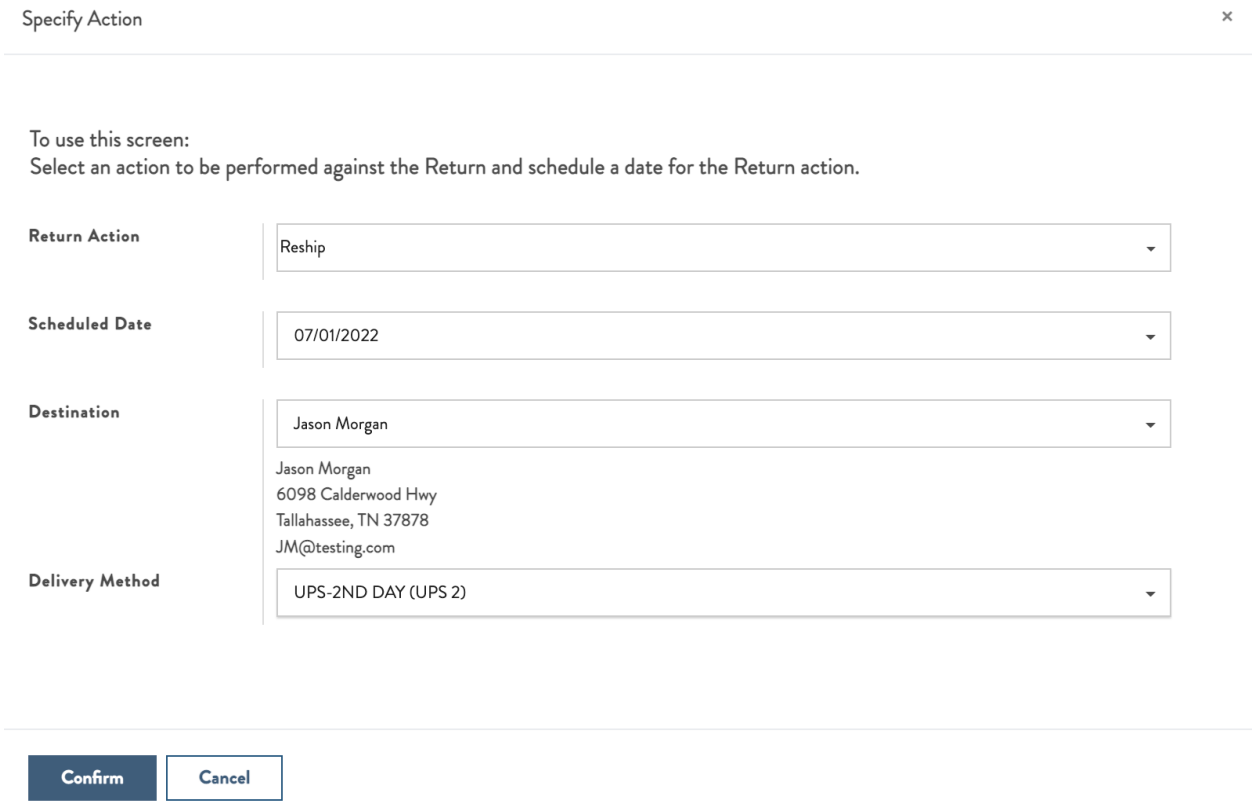
- Reship
- Return to Stock

- Damaged in Transit



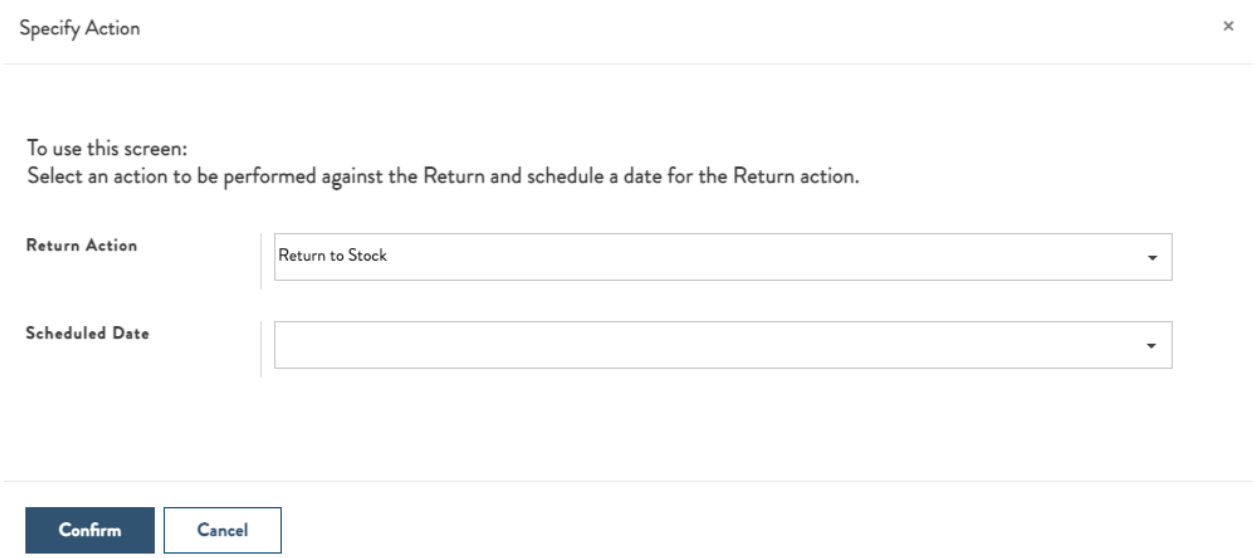
Reship

For Reship, complete the following fields and click Confirm to save, Cancel to discard. Note that you can specify the Scheduled Date that you would like the return to Reship.



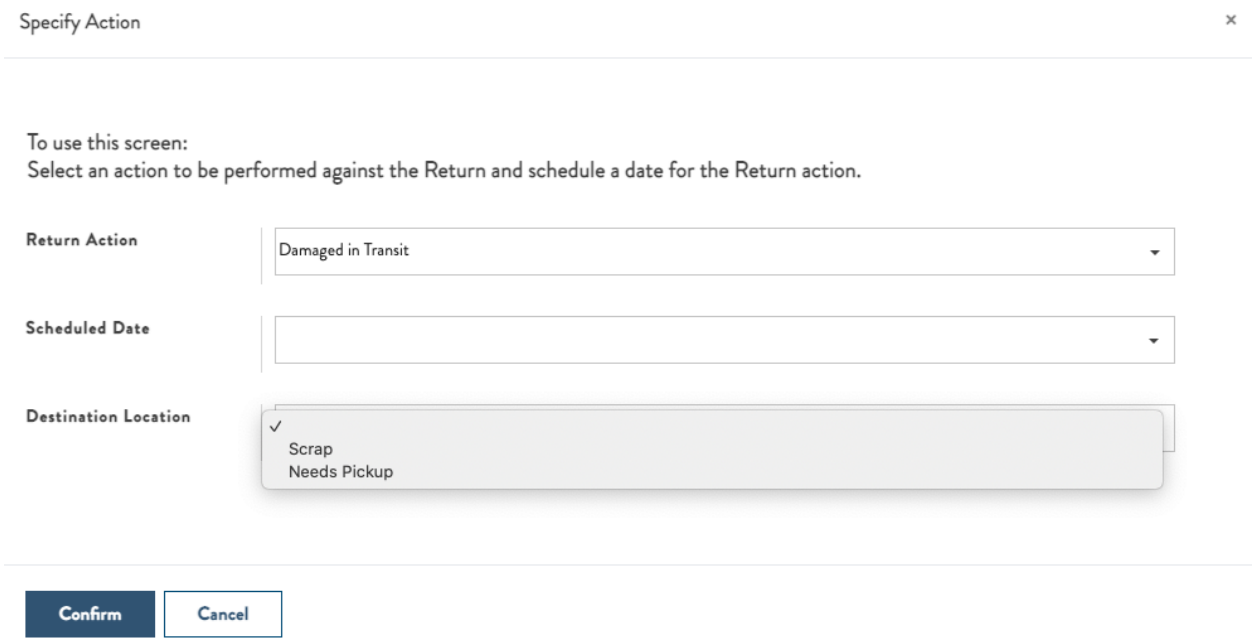
Return to Stock

Complete the Scheduled Date field and click Confirm to save or Cancel to abandon.



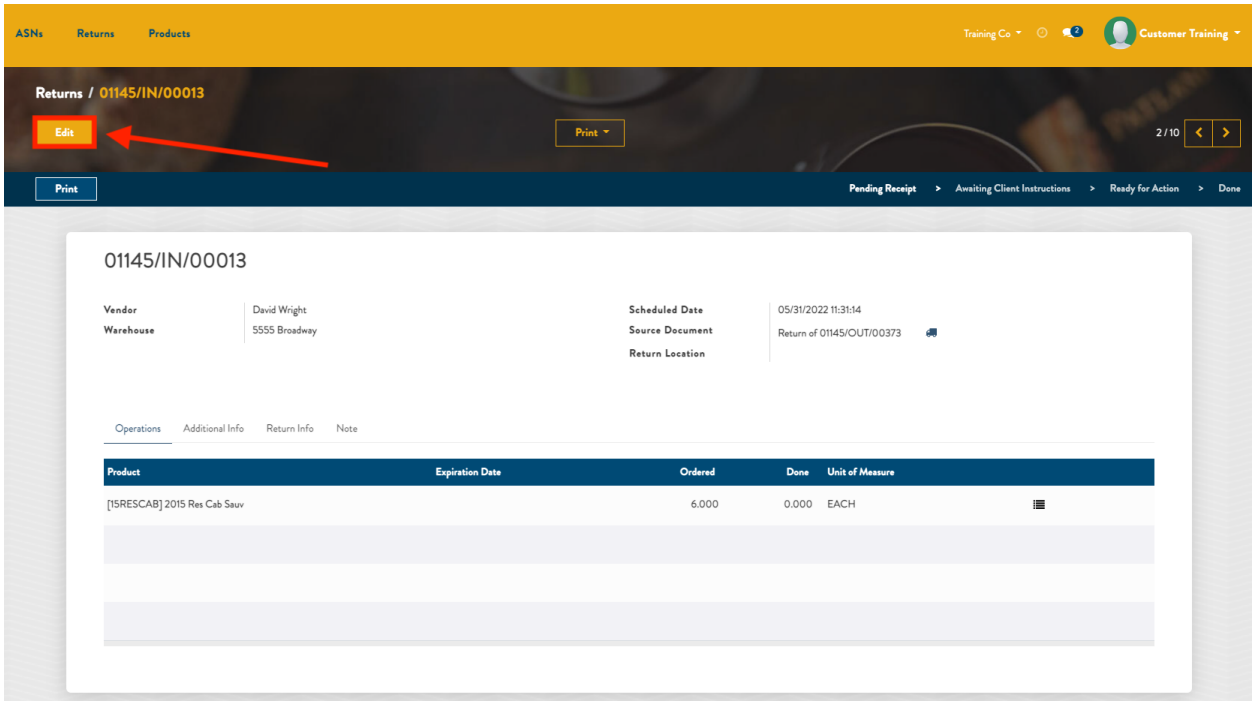
Damaged in Transit

Complete the Scheduled Date and Destination Location fields and click Confirm to save or Cancel to abandon.

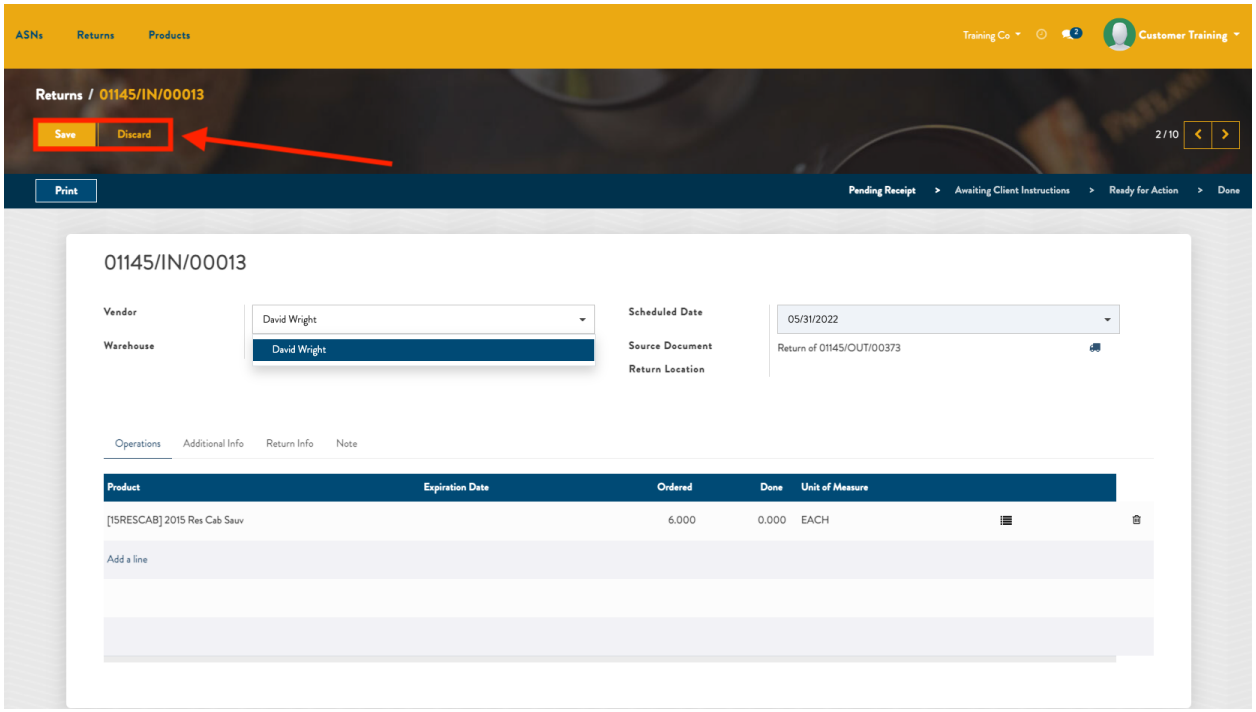


Edit

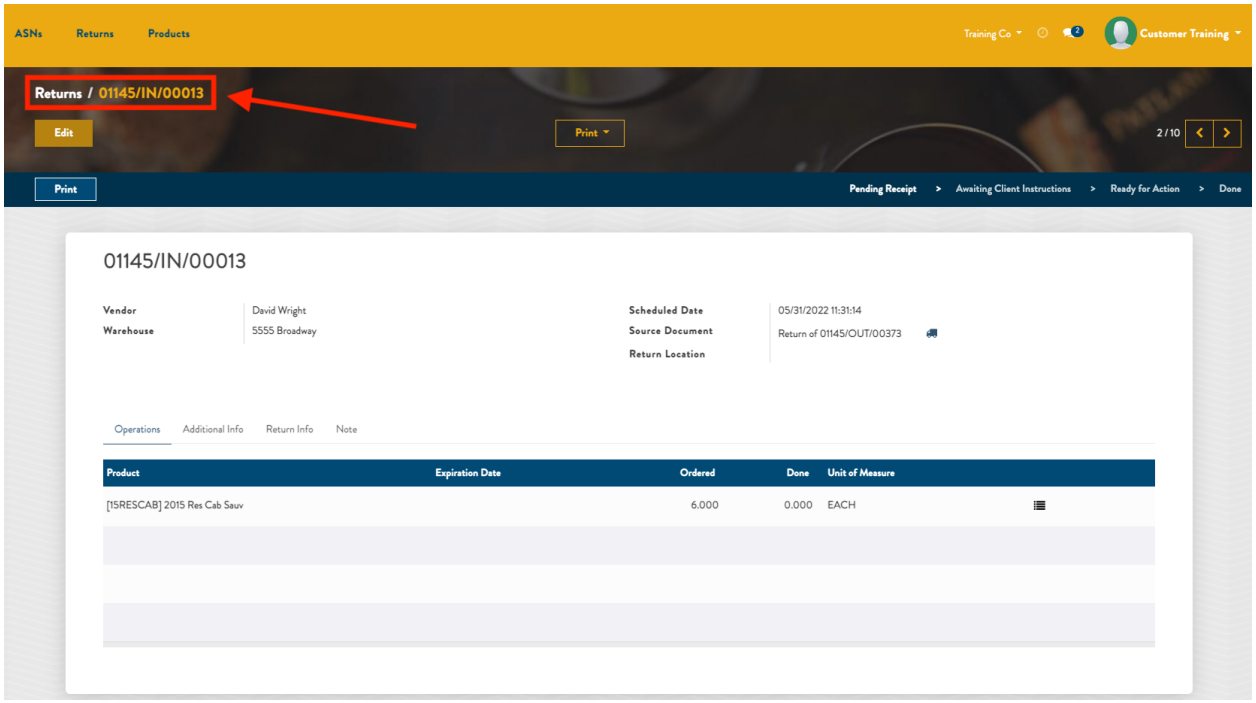
Returns that are not complete, or that do not have a Received status are able to be edited. Click the line item for that return, and click Edit in the upper left corner.



Make the desired edits and click Save to confirm or Discard to abandon the changes.

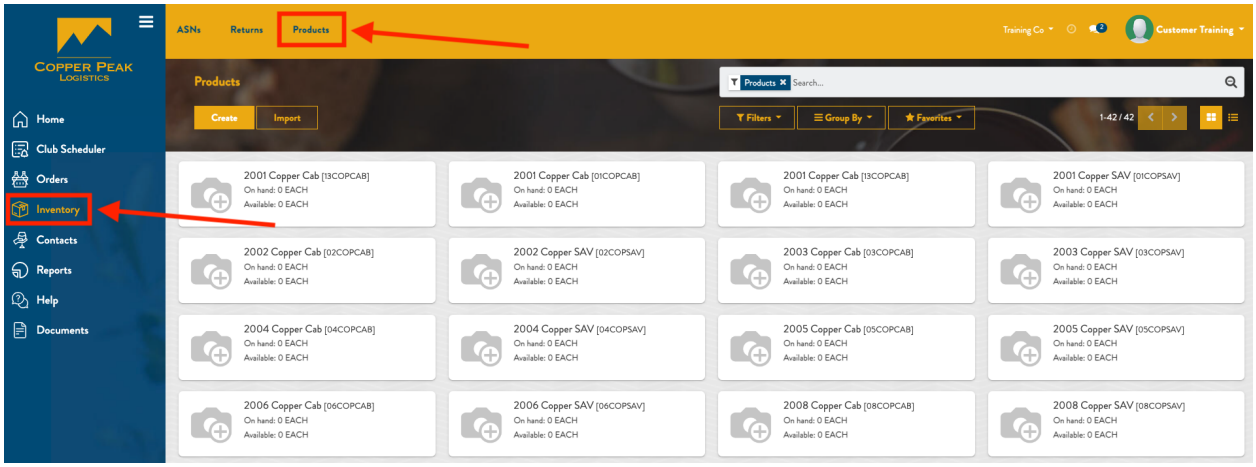


Follow the breadcrumbs back to the main Returns page.


ASNs
Returns
Products
Training Co
Customer Training
Returns / 01145/IN/00013
Edit
Print
2 / 10
Print
Pending Receipt
Awaiting Client Instructions
Ready for Action
Done
01145/IN/00013
Vendor
David Wright
Warehouse
5555 Broadway
Scheduled Date
05/31/2022 11:31:14
Source Document
Return of 01145/OUT/00373
Return Location
Operations
Additional Info
Return Info
Note
Product
Expiration Date
Ordered
Done
Unit of Measure
[1SRESCAB] 2015 Res Cab Sauv
6.000
0.000
EACH

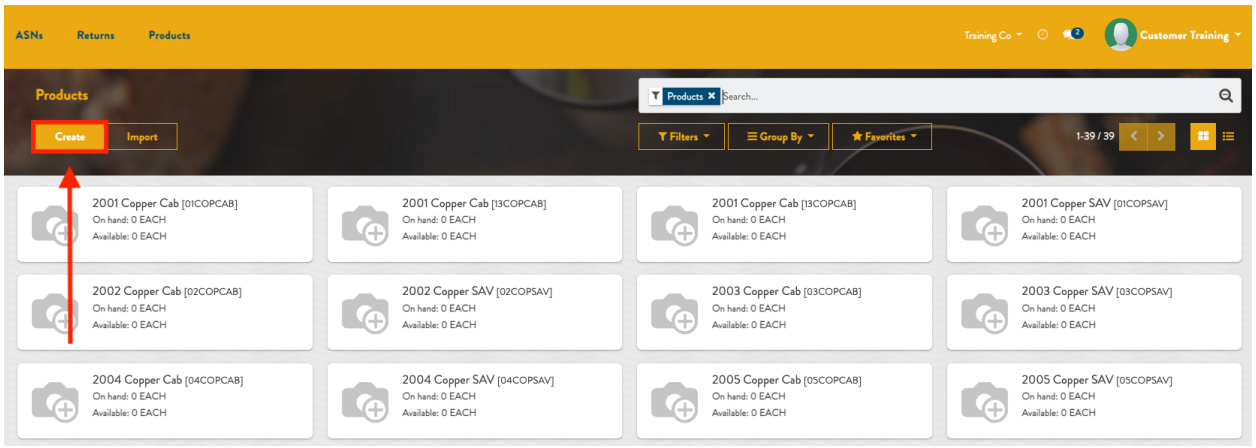
Products

From the Inventory menu on the left, select Products from the yellow menu bar at the top of the page. This provides a list of all products, as shown below:



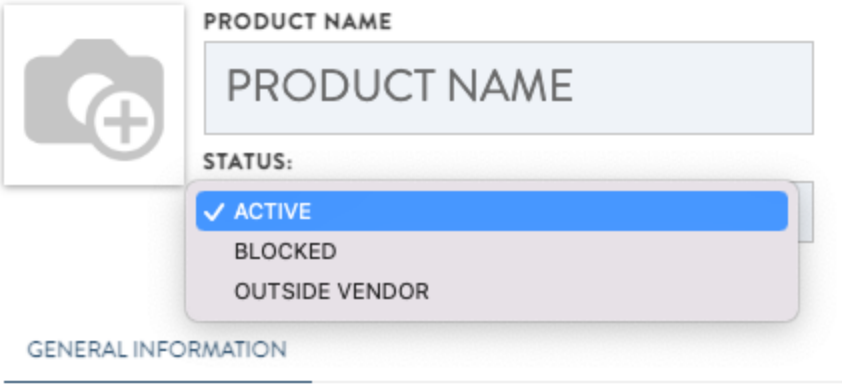
Creating Product

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

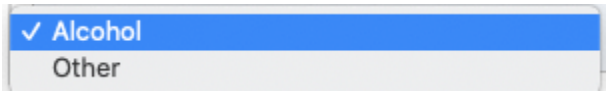


Complete the fields on the following page:

- Product Name (required)
- Status

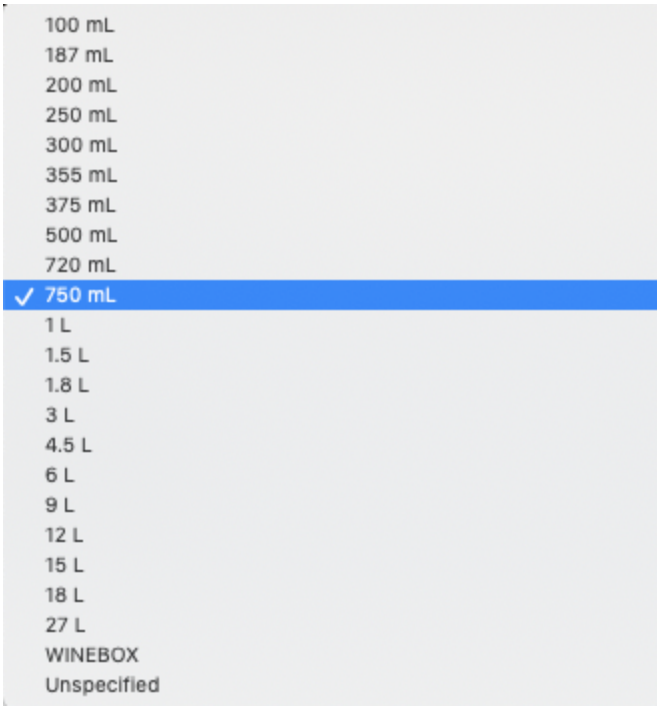


    - Active
    - Blocked
        - Hides the product from being able to be searched
    - Outside Vendor
- General Information
    - SKU (required)
    - Product Type (required)

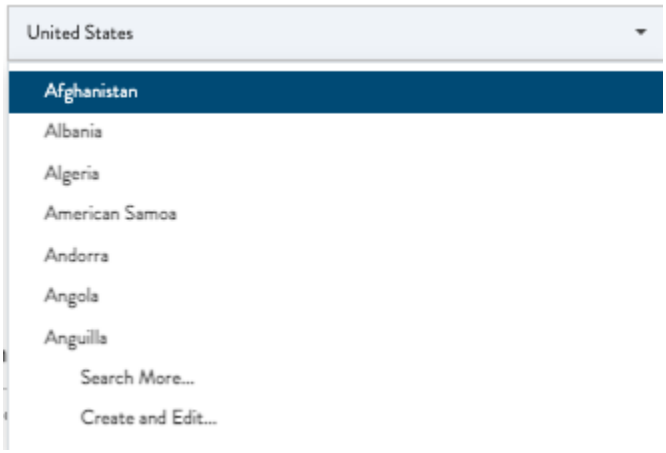


    - Lowstock Contact
        - Contact responsible if stock levels go below the Lowstock Quantity threshold
    - Lowstock Qty
        - Stock level threshold when more items should be sent to the warehouse
- Alcohol
    - Alcohol Percentage (required)
    - Product Type (required)

    - Bottle Size (required)



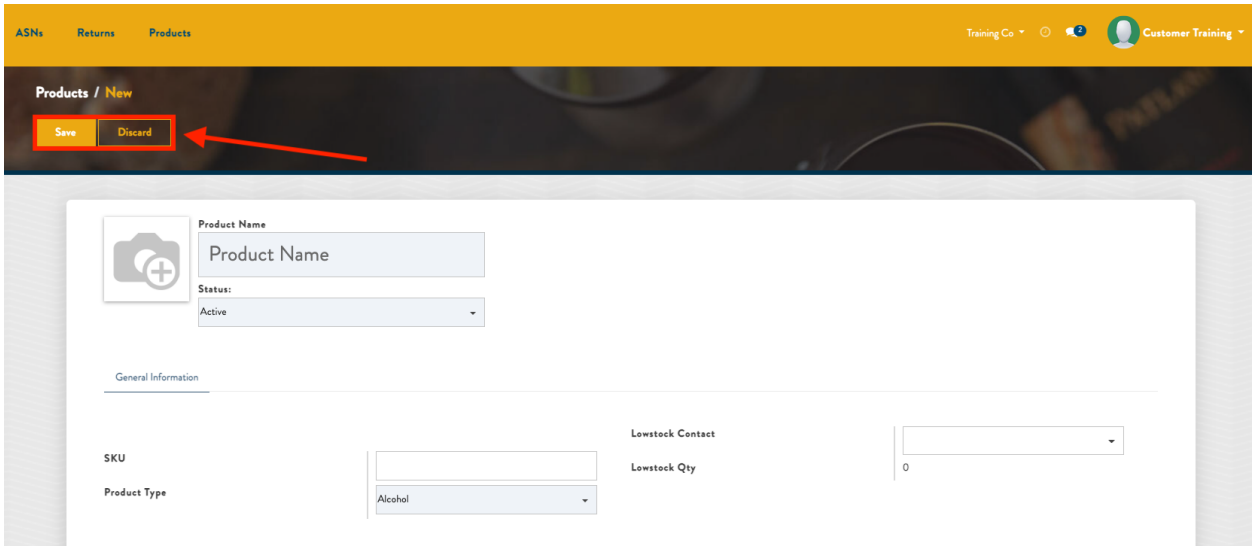
- Vintage Year (required)
- Country (required)



- State

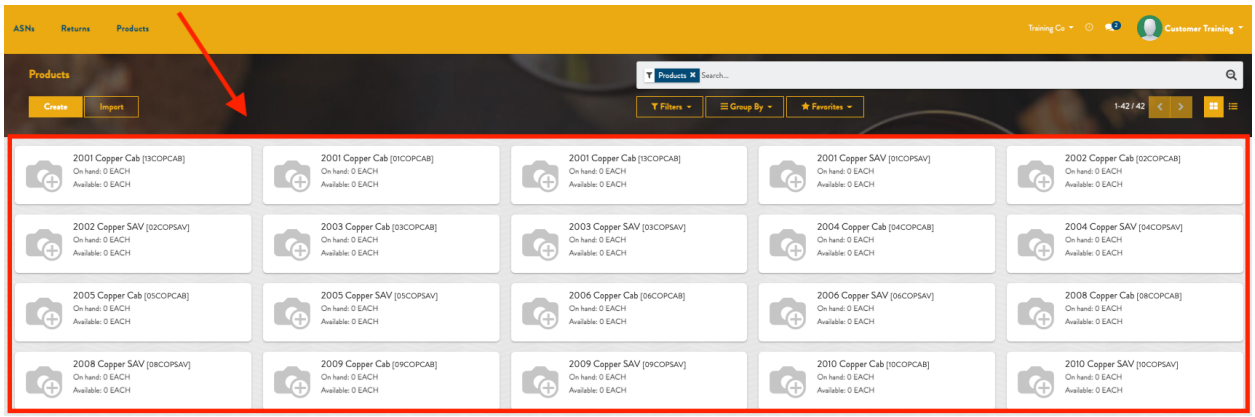
    - Appellation (required)
    - Brand
    - UPC Code (barcode)
    - NABCA Code
    - UNIMERC Code
    - SCC Code
- Packing Slip Description (this is the same as the Product Name and changes in either field will reflect in the other)
    - Enter the desired description which is automatically saved
    - This note will show up on delivery orders

When done, click Save to confirm or Discard to abandon the changes, as shown below:

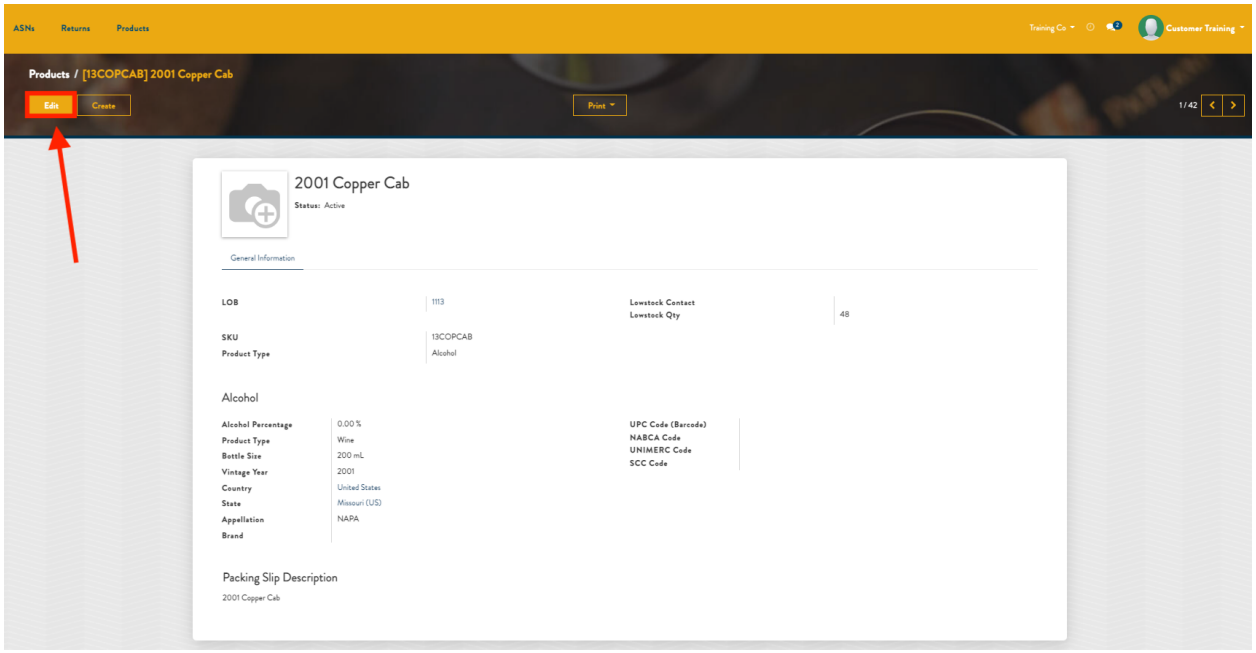


Editing Product

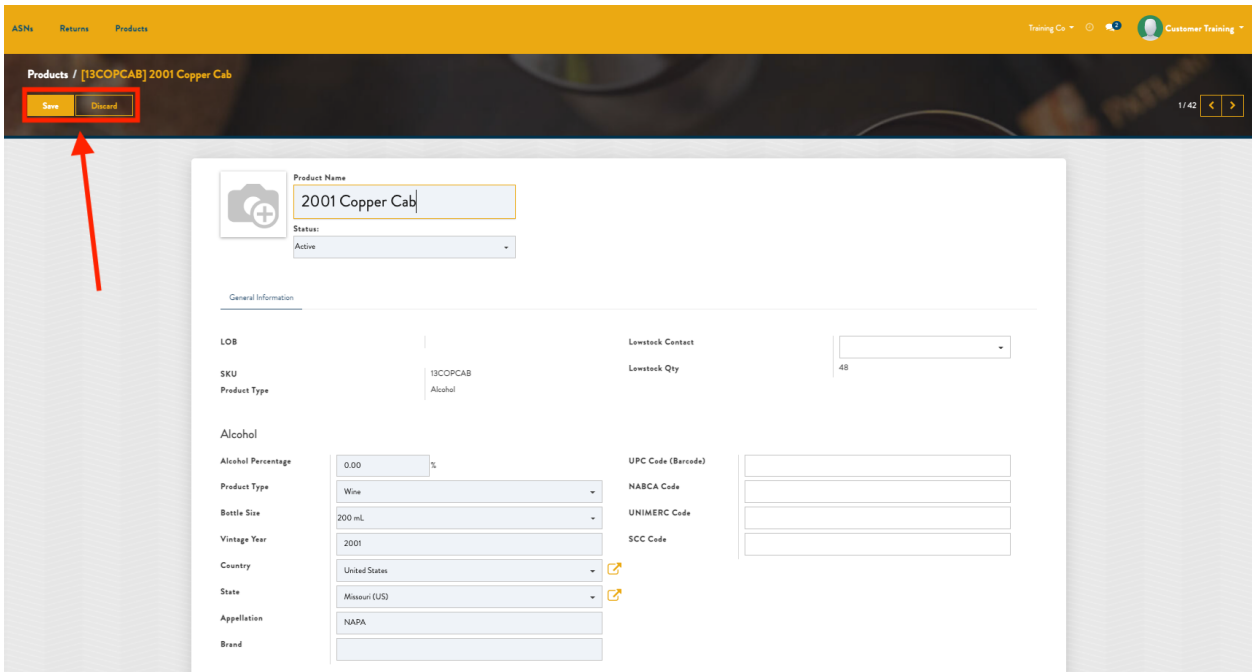
To edit an existing product, click the card of the product you would like to edit.



Click Edit in the upper left corner to make the desired changes.

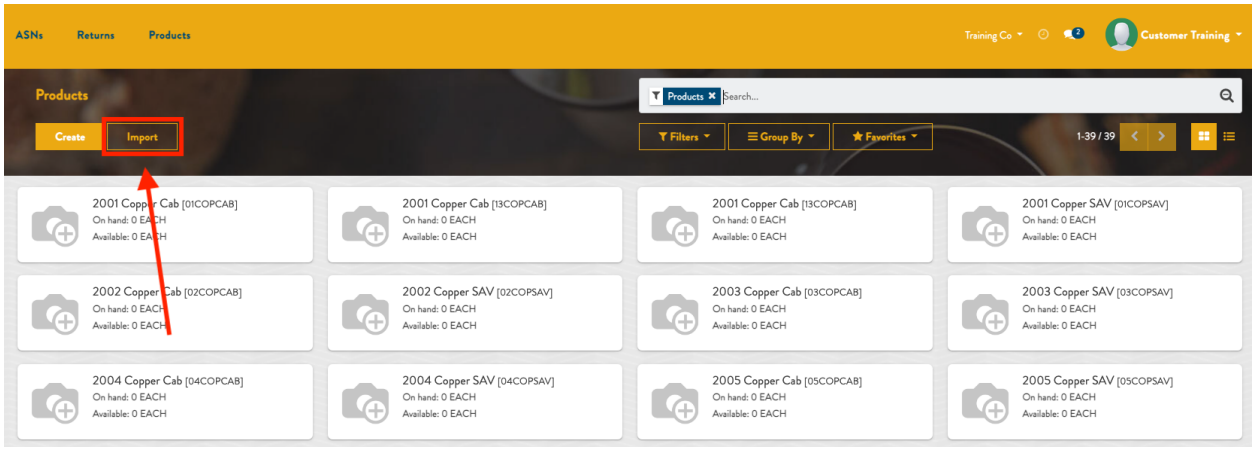
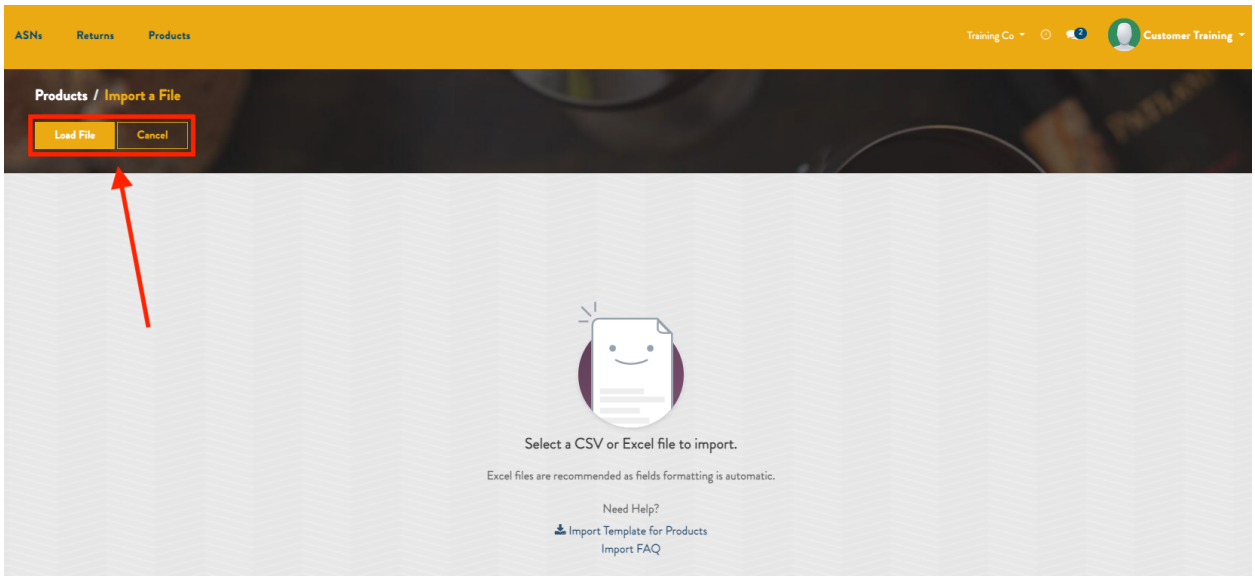


Make the desired changes and click Save in the upper left corner to confirm or Discard to abandon.



Importing a Product

To import a new product, click the Import button in the upper left of the screen, as shown below:



Click Load File and select the file you'd like to import. To abandon the action, click Cancel.