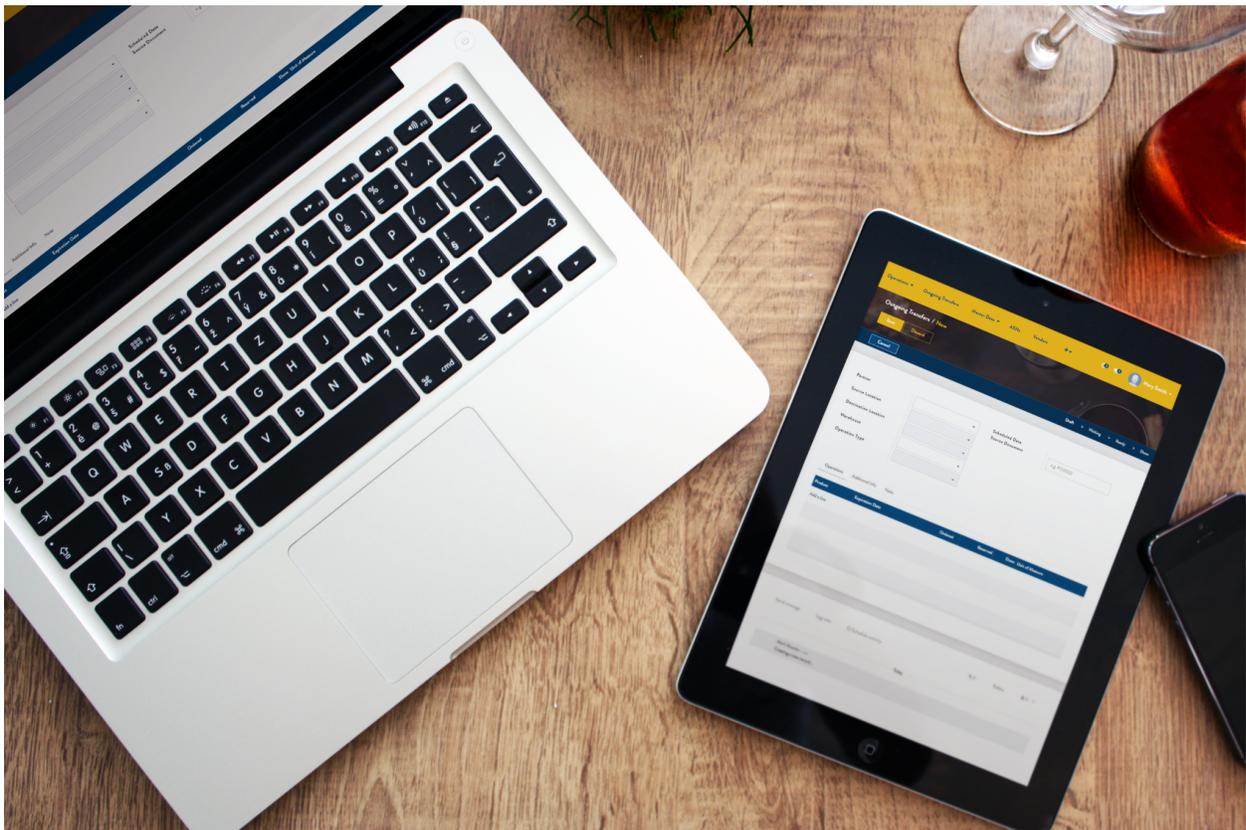


# CopperLink Inventory Support Documentation

*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](#)

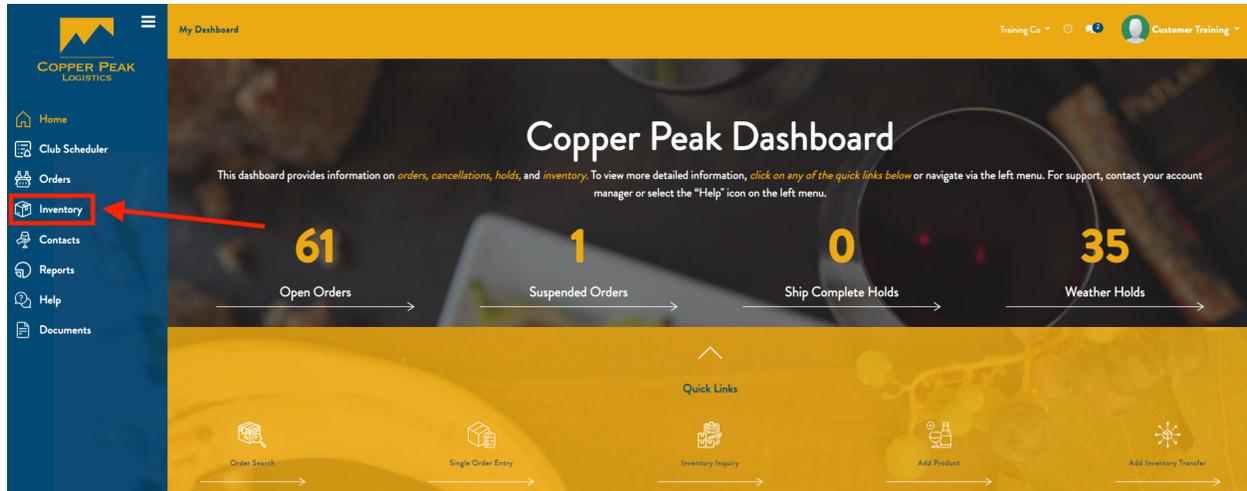
## **Products**

[Creating Product](#)

[Importing a Product](#)

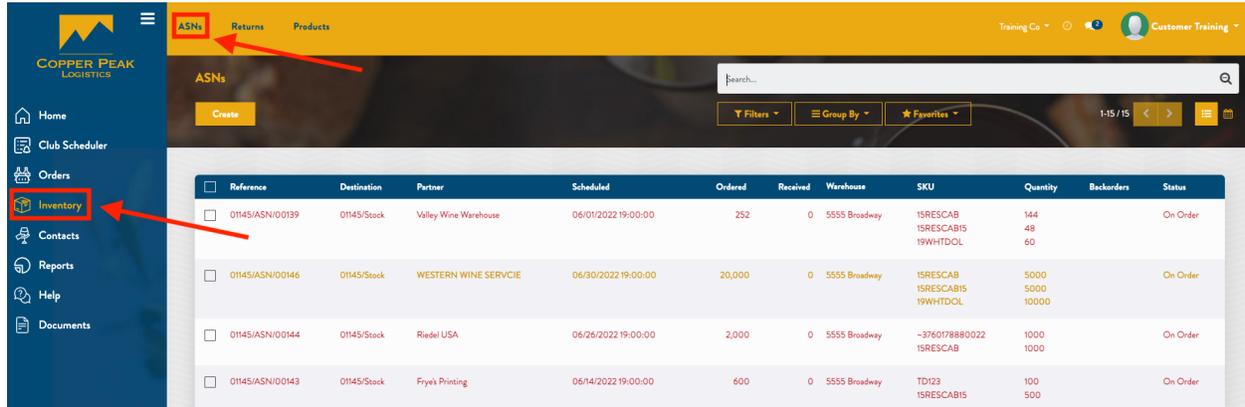
# Inventory

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



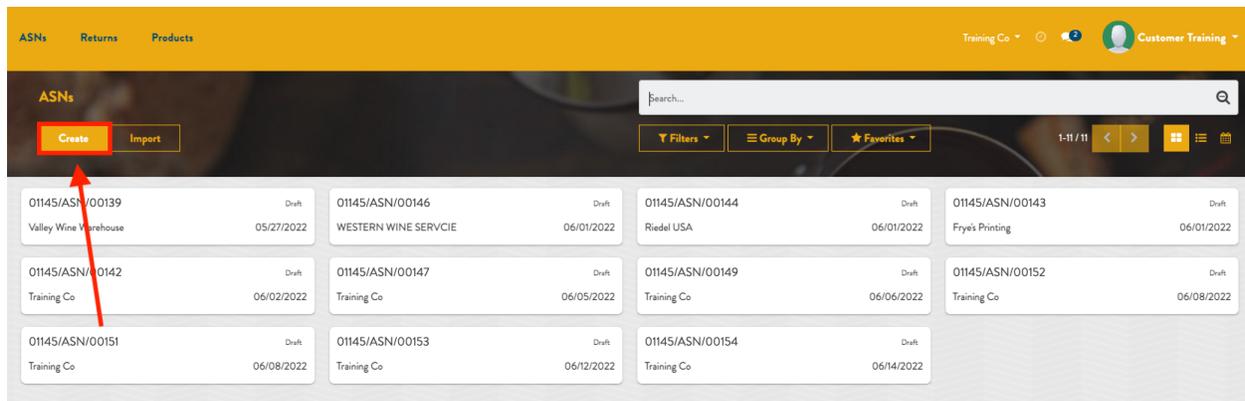
# Advanced Shipping Notifications (ASNs)

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:

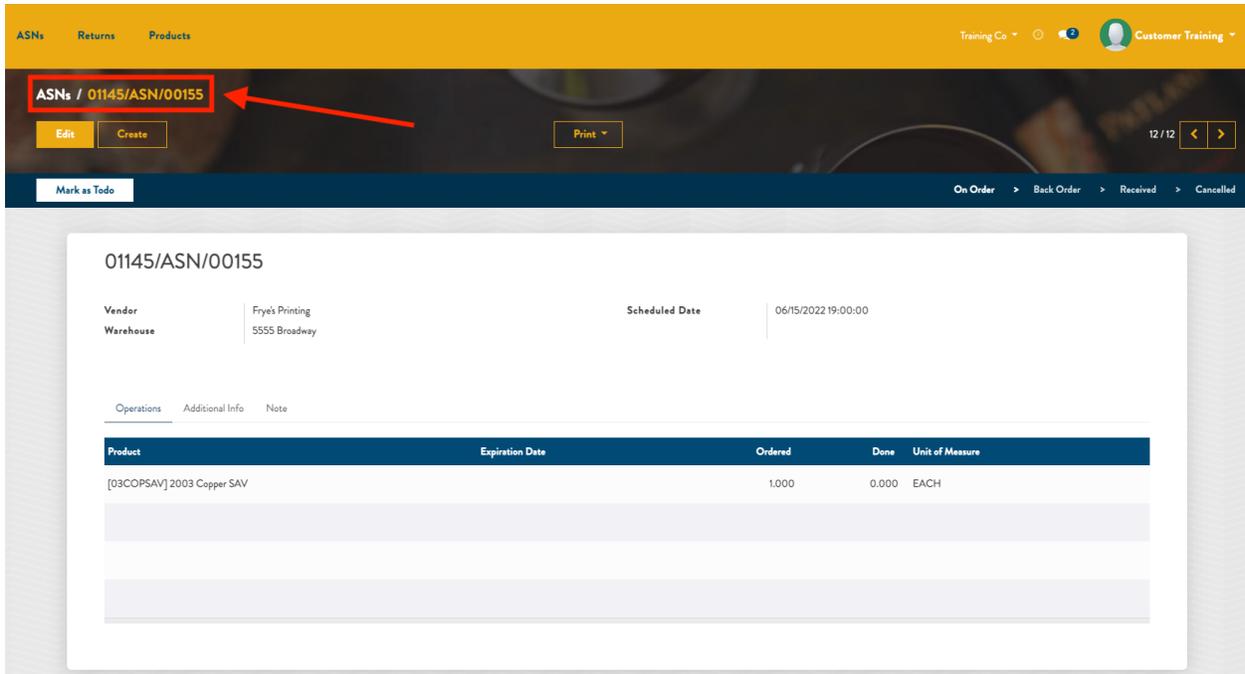


The following screen will appear:

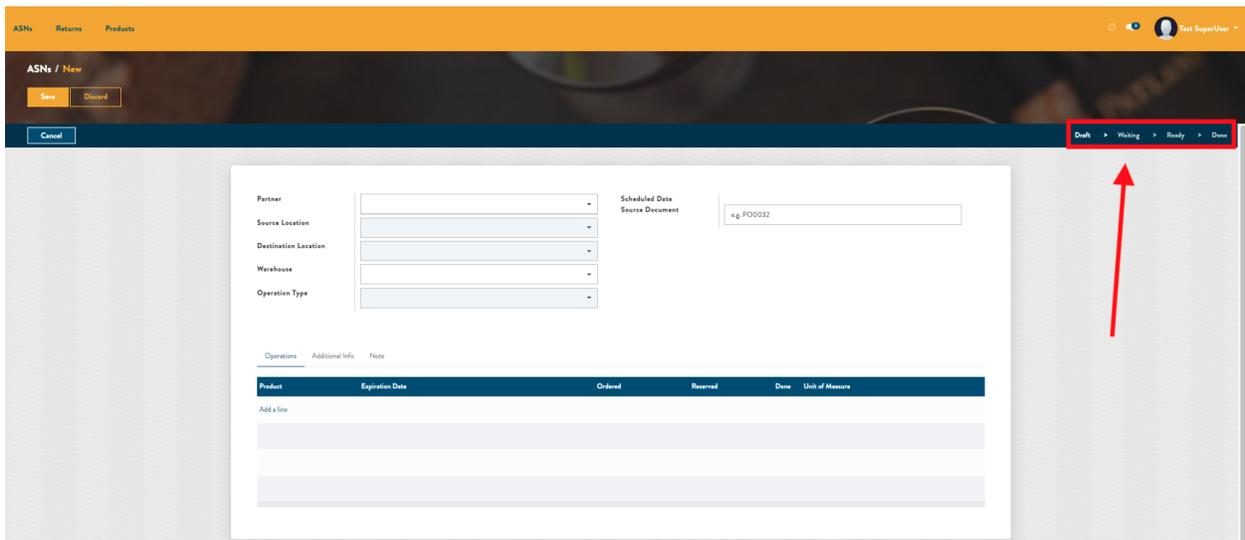
The screenshot shows a web application interface for creating a new ASN. At the top, there is a yellow navigation bar with links for 'ASNs', 'Returns', and 'Products'. On the right side of the header, there is a 'Training Co' dropdown and a user profile icon labeled 'Customer Training'. Below the header, the page title is 'ASNs / New'. There are two buttons: 'Save' and 'Discard'. A breadcrumb trail at the bottom right of the header shows 'Draft > Waiting > Ready > Done'. The main form area contains three dropdown menus: 'Vendor', 'Warehouse', and 'Scheduled Date'. Below these is a tabbed interface with 'Operations', 'Additional Info', and 'Note' tabs. The 'Operations' tab is active, showing a table with the following columns: Product, Expiration Date, Ordered, Reserved, Done, and Unit of Measure. The table is currently empty.

- 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:

Reference	Destination	Partner	Scheduled	Ordered	Received	Warehouse	SKU	Quantity	Backorders	Status
<input type="checkbox"/> 01146/IN/00004	01146/Stock	Training Co	05/31/2022 11:36:50	1	1	3310 Corporate	1SRESCABIS	1		Received
<input type="checkbox"/> 01145/IN/00013	01145/Stock	David Wright	05/31/2022 11:31:14	6	0	5555 Broadway	1SRESCAB	6		On Order
<input type="checkbox"/> 01145/IN/00015	01145/Stock	Training Co	06/06/2022 13:45:12	2	2	5555 Broadway	19WHTDOL NOIRV	1 1		Received
<input type="checkbox"/> 01145/IN/00016	01145/Stock	Jason Morgan	06/06/2022 14:42:54	1	1	5555 Broadway	1SRESCAB	1		Received
<input type="checkbox"/> 01145/IN/00018	01145/Stock	Jason Morgan	06/06/2022 14:44:51	1	1	5555 Broadway	1SRESCAB	1		Received
<input type="checkbox"/> 01145/IN/00020	01145/Stock	Jason Morgan	06/06/2022 14:46:25	2	2	5555 Broadway	1SRESCAB 1SRESCABIS	1 1		Received

## Specify Action

Click on any line item and then click Specify Action.

01145/IN/00018

Vendor: Jason Morgan  
Warehouse: 5555 Broadway

Scheduled Date: 06/06/2022 14:44:51  
Effective Date: 06/06/2022 14:45:02  
Source Document: Return of 01145/OUT/00401  
Return Location:

Product	Expiration Date	Ordered	Done	Unit of Measure
[1SRESCAB] 2015 Res Cab Sauv		1,000	1,000	EACH

Select the Return Action

- Reship
- Return to Stock

- Damaged in Transit

Specify Action

x

To use this screen:

Select an action to be performed against the Return and schedule a date for the Return action.

Return Action

Reship  
Return to Stock  
Damaged in Transit

Confirm

Cancel

### 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.

Specify Action

x

To use this screen:

Select an action to be performed against the Return and schedule a date for the Return action.

Return Action

Reship

Scheduled Date

07/01/2022

Destination

Jason Morgan

Jason Morgan  
6098 Calderwood Hwy  
Tallahassee, TN 37878  
JM@testing.com

Delivery Method

UPS-2ND DAY (UPS 2)

Confirm

Cancel

### Return to Stock

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

To use this screen:

Select an action to be performed against the Return and schedule a date for the Return action.

Return Action

Return to Stock

Scheduled Date

Confirm

Cancel

### Damaged in Transit

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

To use this screen:

Select an action to be performed against the Return and schedule a date for the Return action.

Return Action

Damaged in Transit

Scheduled Date

Destination Location

✓  
Scrap  
Needs Pickup

Confirm

Cancel

## 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.

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
[ISRESCAB] 2015 Res Cab Sauv		6.000	0.000	EACH

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

ASNs Returns Products Training Co Customer Training

Returns / 01145/IN/00013

Save Discard Print 2/10

Print Pending Receipt > Awaiting Client Instructions > Ready for Action > Done

01145/IN/00013

Vendor: David Wright  
Warehouse: David Wright

Scheduled Date: 05/31/2022  
Source Document: Return of 01145/OUT/00373  
Return Location:

Operations Additional Info Return Info Note

Product	Expiration Date	Ordered	Done	Unit of Measure
[ISRESCAB] 2015 Res Cab Sauv		6.000	0.000	EACH
Add a line				

Follow the breadcrumbs back to the main Returns page.

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

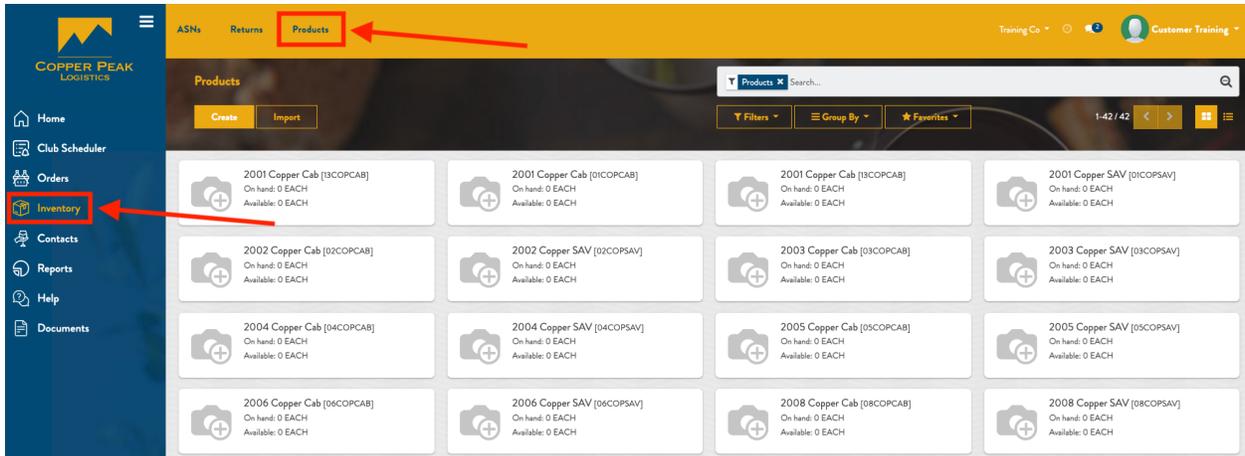
Scheduled Date: 05/31/2022 11:31:14  
Source Document: Return of 01145/OUT/00373  
Return Location:

Operations Additional Info Return Info Note

Product	Expiration Date	Ordered	Done	Unit of Measure
[15RESCAB] 2015 Res Cab Sauv		6.000	0.000	EACH

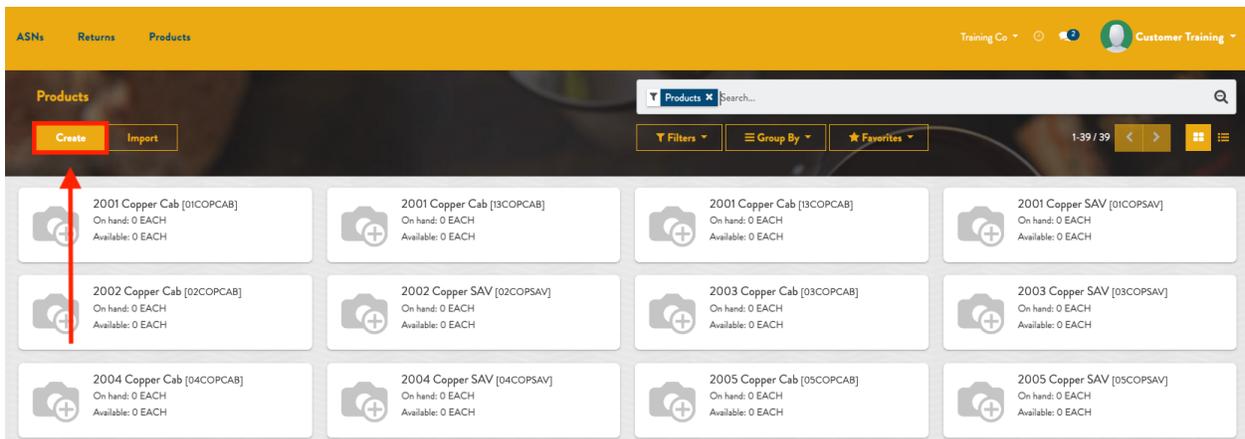
# Products

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

PRODUCT NAME

PRODUCT NAME

STATUS:

- ✓ ACTIVE
- BLOCKED
- OUTSIDE VENDOR

GENERAL INFORMATION

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

- ✓ Alcohol
- Other

- 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)

Product Type

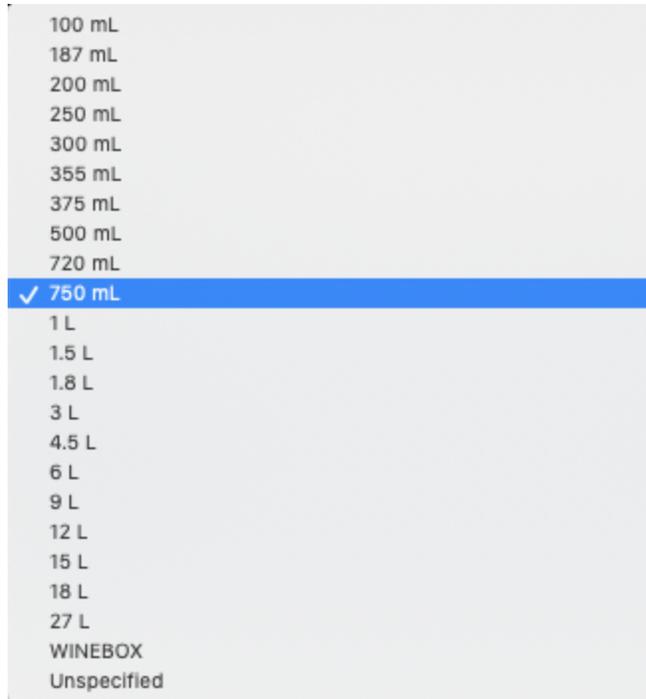
Bottle Size

Vintage Year

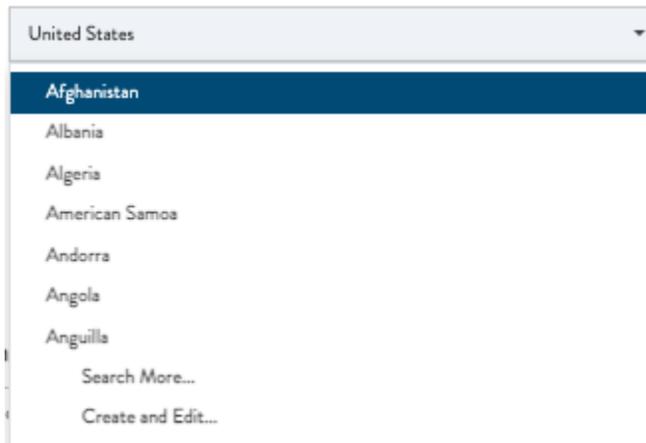
Wine

Beer

- Bottle Size (required)



- Vintage Year (required)
- Country (required)



- State

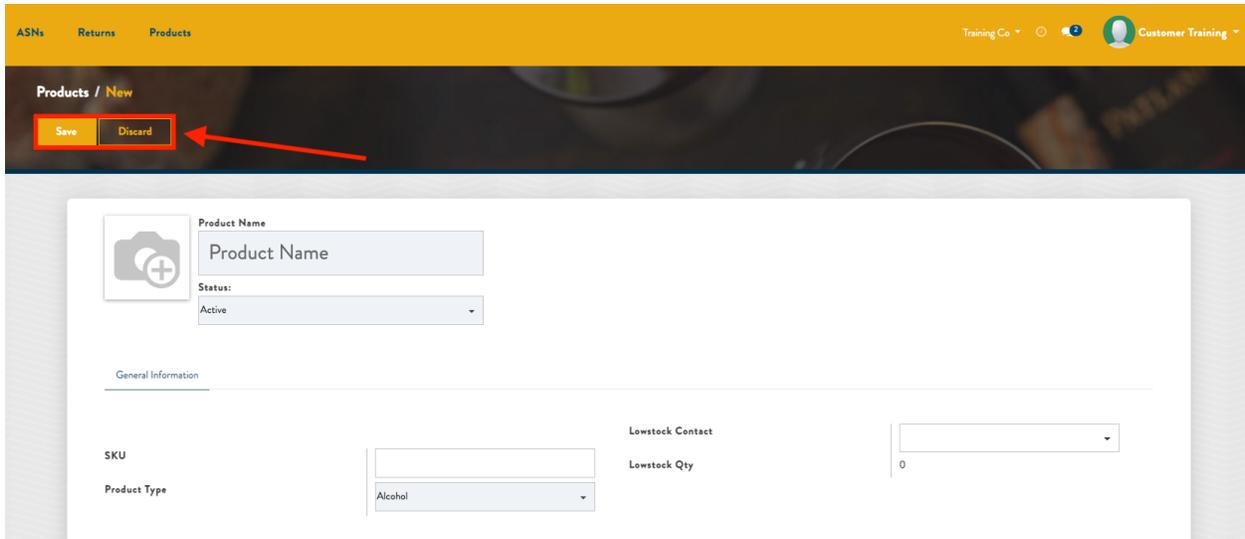


- Appellation (required)
- Brand
- UPC Code (barcode)
- NABCA Code
- UNIMERC Code
- SCC Code
- Packing Slip Description (this is the same as the Product Name and changes in either field will reflect in the other)
  - Enter the desired description which is automatically saved
  - This note will show up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

Packing Slip Description

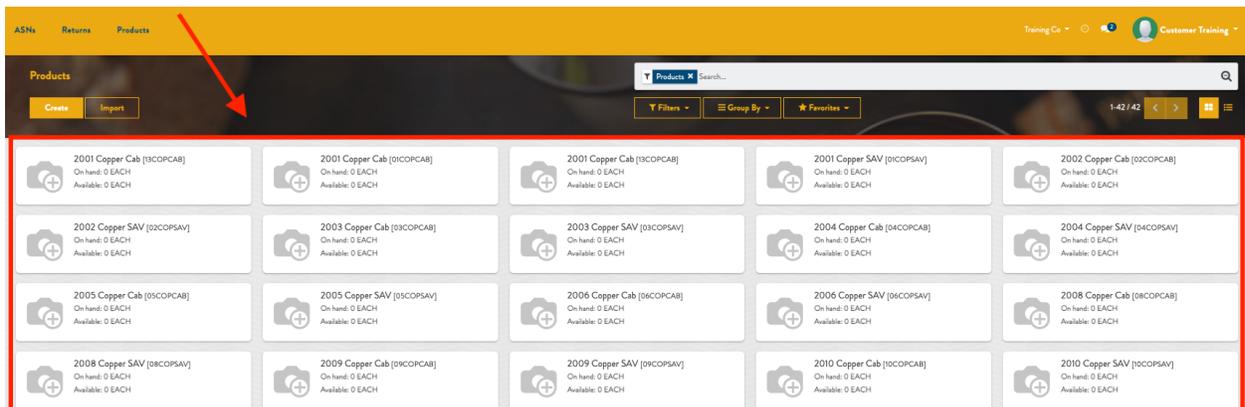
This note will show up on delivery orders.

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

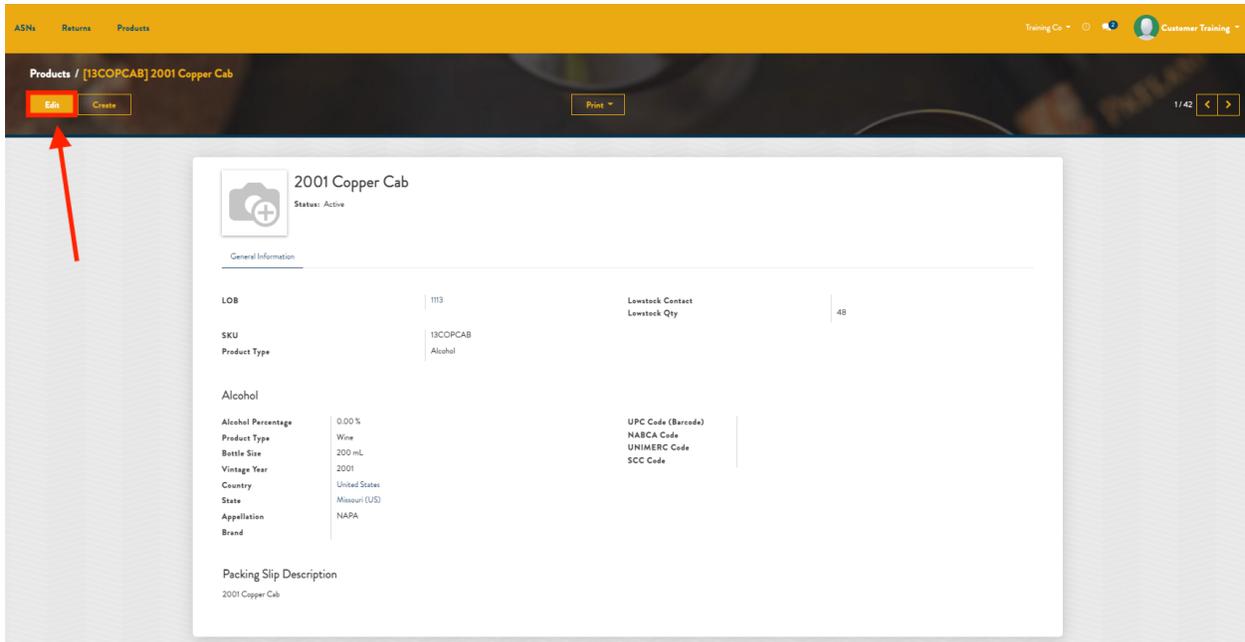


## Editing Product

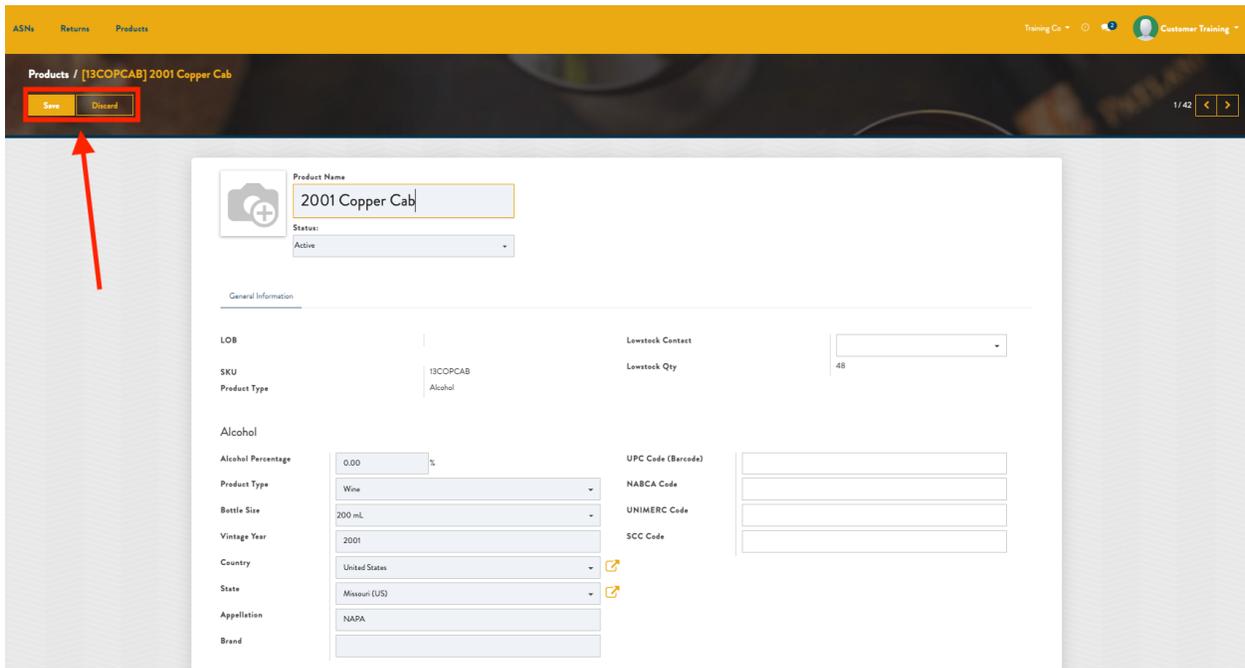
To edit an existing product, click the card of the product you would like to edit.



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

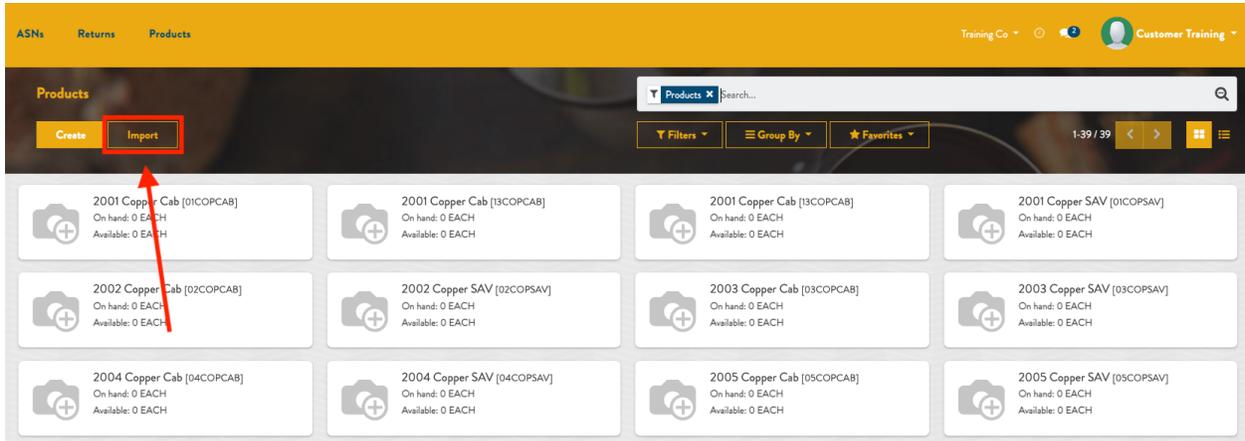


Make the desired changes and click Save in the upper left corner to confirm or Discard to abandon.



## 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.

