

# **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

#### <u>Returns</u>

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:

≡	ASNs Returns Proc	ducts								• 0	Customer Training 🔻
COPPER PEAK LOGISTICS	ASNs				Şearch						Q
G Home	Create				<b>T</b> Filters	•	E Group By 🔻	★ Favorites ▼		1-15 / 15	< > 😑 🗎
Club Scheduler										-	
👬 Orders	Reference	Destination	Partner	Scheduled	Ordered	Received	Warehouse	SKU	Quantity	Backorders	Status
P Contacts	01145/ASN/00139	01145/Stock	Valley Wine Warehouse	06/01/2022 19:00:00	252	0	5555 Broadway	15RESCAB 15RESCAB15 19WHTDOL	144 48 60		On Order
ရာ Reports လို Help	01145/ASN/00146	01145/Stock	WESTERN WINE SERVCIE	06/30/2022 19:00:00	20,000	0	5555 Broadway	15RESCAB 15RESCAB15 19WHTDOL	5000 5000 10000		On Order
Documents	01145/ASN/00144	01145/Stock	Riedel USA	06/26/2022 19:00:00	2,000	0	5555 Broadway	~3760178880022 15RESCAB	1000 1000		On Order
	01145/ASN/00143	01145/Stock	Frye's Printing	06/14/2022 19:00:00	600	0	5555 Broadway	TD123 15RESCAB15	100 500		On Order

# **Creating an ASN**

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

ASNs Returns Products						Training Co 👻 🕐 🥵	Customer Training *
ASNs				Search			Q
Create Import				<b>▼</b> Filters ▼	up By * <b>*</b> Favorites *	1-11/1	n < > 📰 🗄 📾
01145/ASN /00139	Draft	01145/ASN/00146	Draft	01145/ASN/00144	Draft	01145/ASN/00143	Draft
Valley Wine Warehouse	05/27/2022	WESTERN WINE SERVCIE	06/01/2022	Riedel USA	06/01/2022	Frye's Printing	06/01/2022
01145/ASN/00142	Draft	01145/ASN/00147	Draft	01145/ASN/00149	Draft	01145/ASN/00152	Draft
Training Co	06/02/2022	Training Co	06/05/2022	Training Co	06/06/2022	Training Co	06/08/2022
01145/ASN/00151 Training Co	Draft 06/08/2022	01145/ASN/00153 Training Co	Draft 06/12/2022	01145/ASN/00154 Training Co	Draft 06/14/2022		

The following screen will appear:

ASNs Returns Products			Training Co 🔹 🔘 📢	Customer Training -
ASN: / New Save Discard		-		Phillippe
			Dreft > W	aiting > Ready > Done
Vendor Warehouse		Scheduled Date		•
Operations Additional Info	> Note			
Product	Expiration Date	Ordered Reserved	Done Unit of Measure	

- 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:

ASNs Returns Pr	roducts							Training Co	• 0 📢	Customer Training -
ASN: / 01145/ASN Edit Create Mark as Tedo	I/00155		_		Print =		/	On Order	> Back Order	12/12 < > > Received > Cancelled
01145/	/ASN/001	155								
Vendor Warehouse		Frye's Printing 5555 Broadway			Scheduled Date	06/15/2022 19:	00:00			
Operation	ns Additional Inf	o Note								
Product				Expiration Date		Ordered	Done	Unit of Measure		
[03COPSA	V] 2003 Copper SA	V				1.000	0.000	EACH		

The following statuses denote the ASN's current state:

ASNs Returns Products	o 🤷 🚺 hintagettur -
ASNs / New Second	
Cancel	Dunh > Weing > Reedy > Down
Peter Serve Leastin Destination Leastin Warshow Operation Type	Skeld Dos           0           0           0           0
Product	Expiration Data Ordened Bearred Data Unit of Measure
Add a line	

- 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:

■	ASNs Returns	Products								⊙ ⊲2 (	Customer Trainir
COPPER PEAK Logistics	Returns					Search					e
G Home						▼ Filters ▼	≡ Group By ▼	* Favorites *		1-10 / 10	> = = (
Club Scheduler											
A Orders	Reference	Destination	Partner	Scheduled	Ordered	Received	Warehouse	SKU	Quantity	Backorders	Status
	01146/IN/0	0004 01146/Stock	Training Co	05/31/2022 11:36:50	1	1	3310 Corporate	15RESCAB15	1		Received
Panartr	01145/IN/0	0013 01145/Stock	David Wright	05/31/2022 11:31:14	6	0	5555 Broadway	15RESCAB	6		On Order
D Help	01145/IN/01	0015 01145/Stock	Training Co	06/06/2022 13:45:12	2	2	5555 Broadway	19WHTDOL NOINV	1		Received
Documents	01145/IN/0	0016 01145/Stock	Jason Morgan	06/06/2022 14:42:54	1	1	5555 Broadway	15RESCAB	1		Received
	01145/IN/01	0018 01145/Stock	Jason Morgan	06/06/2022 14:44:51	1	1	5555 Broadway	15RESCAB	1		Received
	01145/IN/01	0020 01145/Stock	Jason Morgan	06/06/2022 14:46:25	2	2	5555 Broadway	15RESCAB 15RESCAB15	1		Received

### **Specify Action**

Click on any line item and then click Specify Action.

ASNs	Returns Products						Training Co 👻 🕐 📢	Customer 1	
Retu	urns / 01145/IN/00018 dit		[	Print *				5/10	< >
SF	pecify Action				Pend	ing Receipt >	Awaiting Client Instructions	Ready for Action	> Done
	01145/IN/0001	8							
	Vendor Warehouse	Jason Morgan 5555 Broadway		Scheduled Date Effective Date Source Document Return Location	06/06/2022 14:44:51 06/06/2022 14:45:07 Return of 01145/OUT	2 100401 🛲			
	Operations Additional In	fo Return Info Note							
	Product		Expiration Date	Ordered	Done Unit of Me	asure			
	[15RESCAB] 2015 Res Cab Sau	uv		1.000	1.000 EACH				

Select the Return Action

- Reship
- Return to Stock

#### • Damaged in Transit

Specify Action		×
To use this screen:	a performed against the Peturn and schedule a date for the Peturn 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		×
To use this screen: Select an action to be p	erformed against the Return and schedule a date for the Return action.	
Return Action	Reship -	
Scheduled Date	07/01/2022 🗸	
Destination	Jason Morgan 👻	
Delivery Method	Jason Morgan 6098 Calderwood Hwy Tallahassee, TN 37878 JM@testing.com UPS-2ND DAY (UPS 2)	



#### **Return to Stock**

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

Specify Action

#### 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		•



#### **Damaged in Transit**

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

Specify Action		×
To use this screen: Select an action to be pe	erformed against the Return and schedule a date for the Return action.	
Return Action	Damaged in Transit	•
Scheduled Date		•
Destination Location	√ Scrap Needs Pickup	
Confirm Cance	1	

### 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 Re	eturns Products					Training Co = 💿 🔹 🚺 Customer Tra	aining -
Returns , Edit Print	/ 01145/IN/00013			Print *	Pending Receipt >	2/10 < Ambiting Client Instructions > Ready for Action 2	> Done
	01145/IN/000	13					
	Vendor Warehouse	David Wright 5555 Broadway		Scheduled Date Source Document Return Location	05/31/2022 11:31:14 Return of 01145/OUT/00373		
	Operations Additional	Info Return Info Note					
	Product		Expiration Date	Ordered	Done Unit of Measure		
	[15RESCAB] 2015 Res Cab S	Sauv		6.000	0.000 EACH	=	

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

ASNs Retu	urns Products						Training Co 👻 📀 📢	Custor	
Returns / Save	01145/IN/00013 Discard		-					2/1	0 < >
Print						Pending Receipt	<ul> <li>Awaiting Client Instructions</li> </ul>	<ul> <li>Ready for Action</li> </ul>	en > Done
	O1145/IN/00013 Vender Warehouse	David Wright David Wright Return Info Note	•	Scheduled Date Source Document Return Location	05 Retur	5/31/2022 rn of 01145/OUT/00373		- 69	
	Product		Expiration Date	Ordered	Done	Unit of Measure			
	[15RESCAB] 2015 Res Cab Sauv			6.000	0.000	EACH	1	Ē	
	Add a line								

Follow the breadcrumbs back to the main Returns page.

ASNs	Returns Products				Training Co 🍷 💿 📢 🚺 Customer Training 🤊	-
Return Edit	ns / 01145/IN/00013	- [	Print *	Pending Receipt 🔷	2/10 < > Availing Client Instructions > Ready for Action > Down	•
	01145/IN/00013					
	Vendor David Wright Warehouse 5555 Broadway		Scheduled Date Source Document Return Location	05/31/2022 11:31:14 Return of 01145/OUT/00373		
	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 INFO	ORMATION

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

$\checkmark$	lcohol	
	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	Wine
Vintage Year	Beer

• Bottle Size (required)

100 mL		
187 mL		
200 mL		
250 mL		
300 mL		
355 mL		
375 mL		
500 mL		
720 mL		
🗸 750 mL		
1 L		
1.5 L		
1.8 L		
3 L		
4.5 L		
6 L		
9 L		
12 L		
15 L		
18 L		
27 L		
WINEBOX		
Unspecified		

- Vintage Year (required)
- Country (required)

United States	•
Afghanistan	
Albania	
Algeria	
American Samoa	
Andorra	
Angola	
Anguilla	
Search More	
Create and Edit	

• 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:

ASNs Re	turns Products					Training Co 👻 💿 📢	Customer Training ~
Products Save	/ New Discard			-			Pallan
	General Information	Product Name Product Name Status: Active	-				
	SKU Product Type		Alcohol	•	Lowstock Contact Lowstock Qty	0	•

## **Editing Product**

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

ASNs Returns Products				Training Co 👻 🔍 Custamer Training *
Products		T Products × Search		Q
Create Import		T Filters → Ξ Group	By - <b>*</b> Favorites -	1-42/42 < > 🎞 🗮
2001 Copper Cab [t3COPCAB]	2001 Copper Cab (DICOPCAB)	2001 Copper Cab (ISCOPCA8)	2001 Copper SAV (0ICOPSAV)	2002 Copper Cab (02COPCAB)
On hand: 0 EACH				
Available: 0 EACH				
2002 Copper SAV [02COPSAV]	2003 Copper Cab [03COPCA8]	2003 Copper SAV [03COPSAV]	2004 Copper Cab [04COPCAB]	2004 Copper SAV [04COPSAV]
On hard: 0 EACH	On hard: 0 EACH	On hand 0 EACH	On hand: 0 EACH	On hand: 0 EACH
Available: 0 EACH				
2005 Copper Cab (05COPCAB)	2005 Copper SAV [05COPSAV]	2006 Copper Cab [06COPCA8]	2006 Copper SAV [o6COPSAV]	2008 Copper Cab (08COPCAB)
On hard: 0 EACH	On hard: 0 EACH	On hand 0 EACH	Ch hand: 0 EACH	On hand: 0 EACH
Available: 0 EACH				
2008 Copper SAV [08COPSAV]	2009 Copper Cab (09COPCAB)	2009 Copper SAV [09COPSAV]	2010 Copper Cab [IOCOPCAB]	2010 Copper SAV [IoCOPSAV]
On hand: 0 EACH				
Available: 0 EACH				

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

ASNs Returns Products					Co + 💿 🕫 🚺 Customer Training +
Products / [I3COPCAB] 2001 Copper Cab		Print *			1/42 🔇 🗲
General	2001 Copper Cab Status: Active				
LO8 SKU Product Ty	Type	1113 13COPCAB Alcohol	Lewstock Contact Lewstock Qty	48	
Alcohol	I				
Aleshah P Predest 7 Bests Sir Visage Cesstry Sast Appellatis Brand Packing 2001 Capp	Vice Vice Vice 200 mL Vice 200 mL Vice 2001 Uniced Status Massuri (US) an NAPA g Slip Description		UPCCd4 (Birosd) NABCA Cod UNIMERC Cod SCC Code		

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

ASNs Returns Products				raining Co 👻 💿 💶 Customer Training *
Products / [13COPCAB] 2001 Cop	oper Cab			1/42 < >
	Product I 2000 Statue Active Central Information	11 Copper Cab		
	LOB SKU Product Type	13COPCAB Akohol	Lowstock Contact Lowstock Qty	
	Alcohol Alcohol Percentage Perduct Type Bottle Size Vintage Year Country Sate Appellation Brand	0.00 % Wow 200 mL 2001 United States Misseari (US) NAPA	UPC Cede (Barcode) NABCA Cede UNIMERC Cede SCC Cede	

### **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.

