

CopperLink Orders Support Documentation

For Copper Peak



The following documentation addresses the functionality under the Orders menu. It will cover Single Order Entry, Suspended Orders, Order Search, Ship Complete Orders, Order Import and Weather Holds.

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[Ship Complete Orders](#)

[Order Import](#)

[Weather Holds](#)

[Weather Map](#)

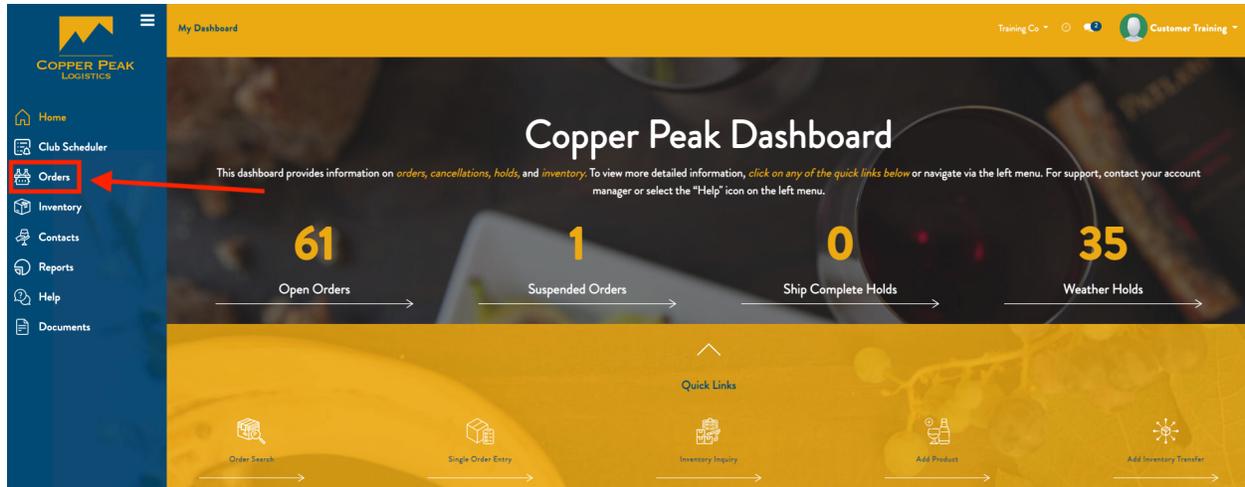
[State Weather Holds Configuration](#)

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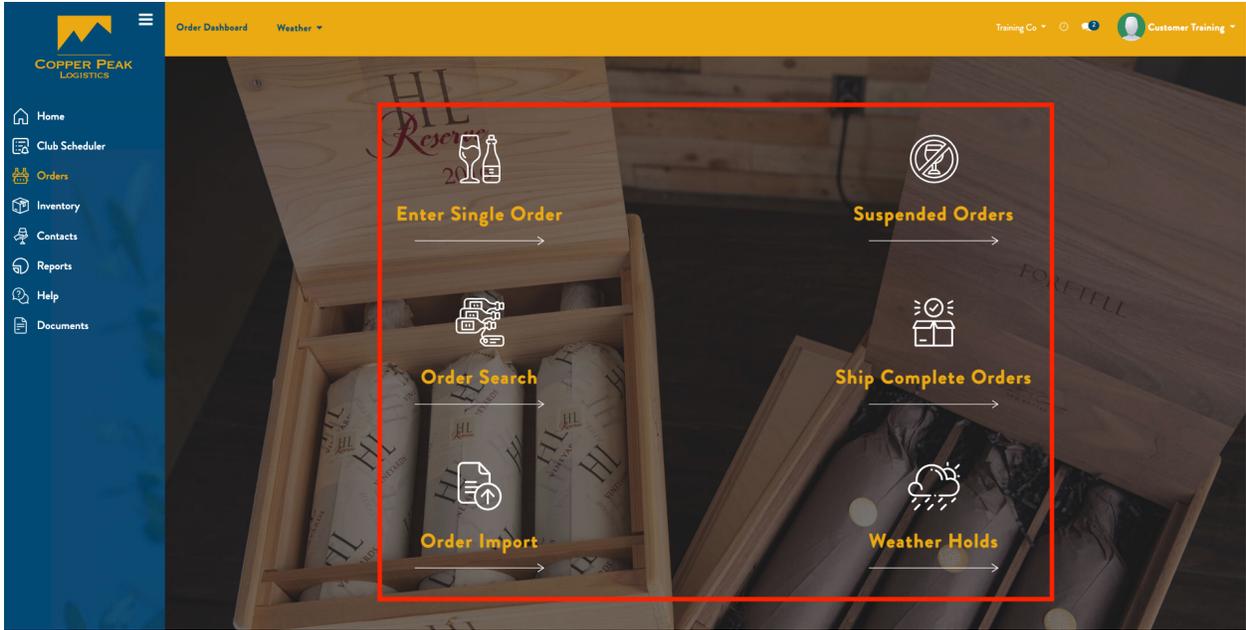
Orders

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



This will navigate to the main Orders Dashboard, which by default displays the following quick links (in yellow text):

- Enter Single Order
- Suspended Orders
- Order Search
- Ship Complete Orders
- Order Import
- Weather Holds

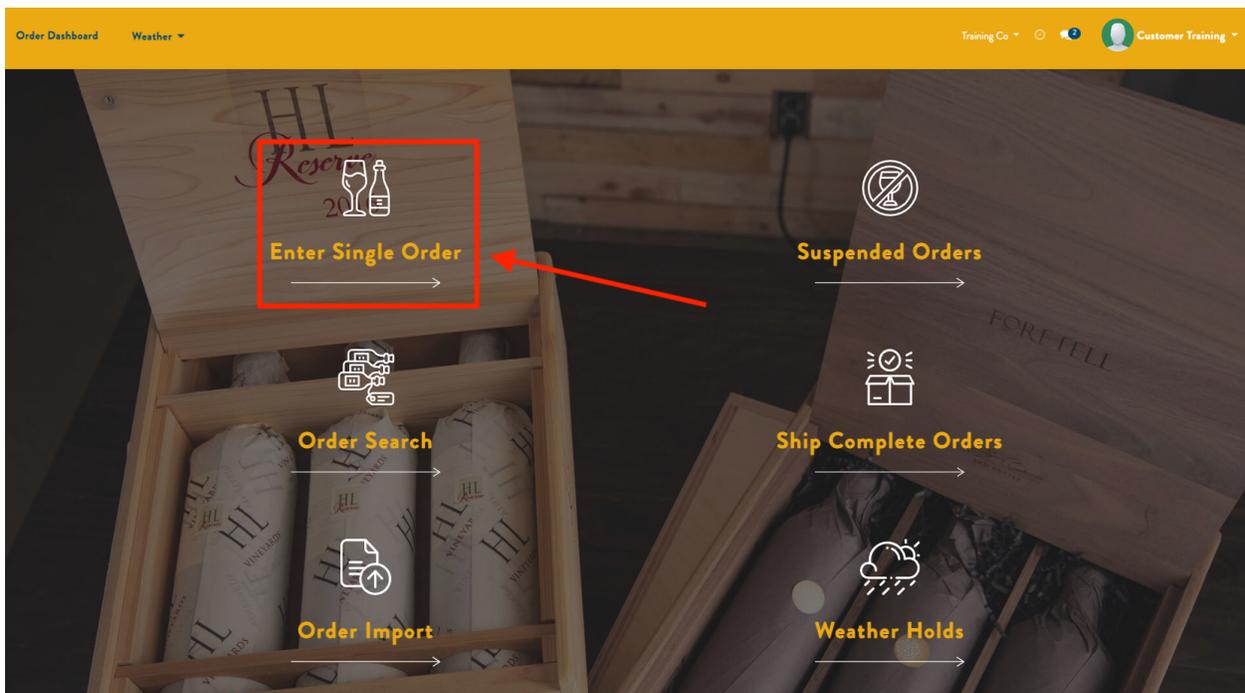


Enter Single Order

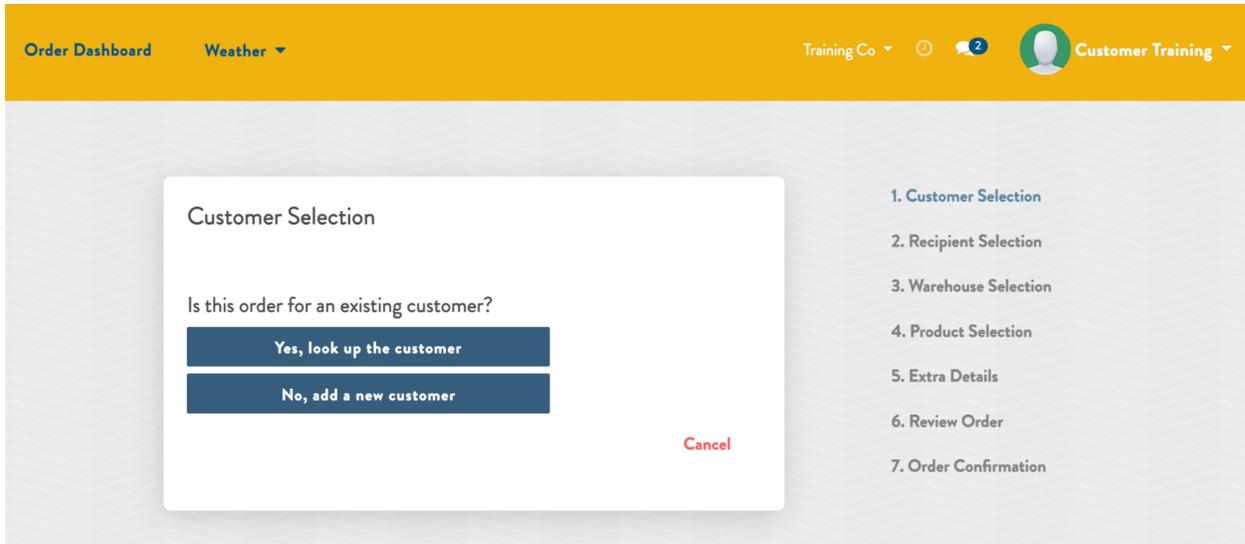
When creating a new Order, you will be prompted through the following steps:

1. Customer Selection
2. Recipient Selection
3. Warehouse Selection
4. Product Selection
5. Extra Details
6. Review Order
7. Order Confirmation

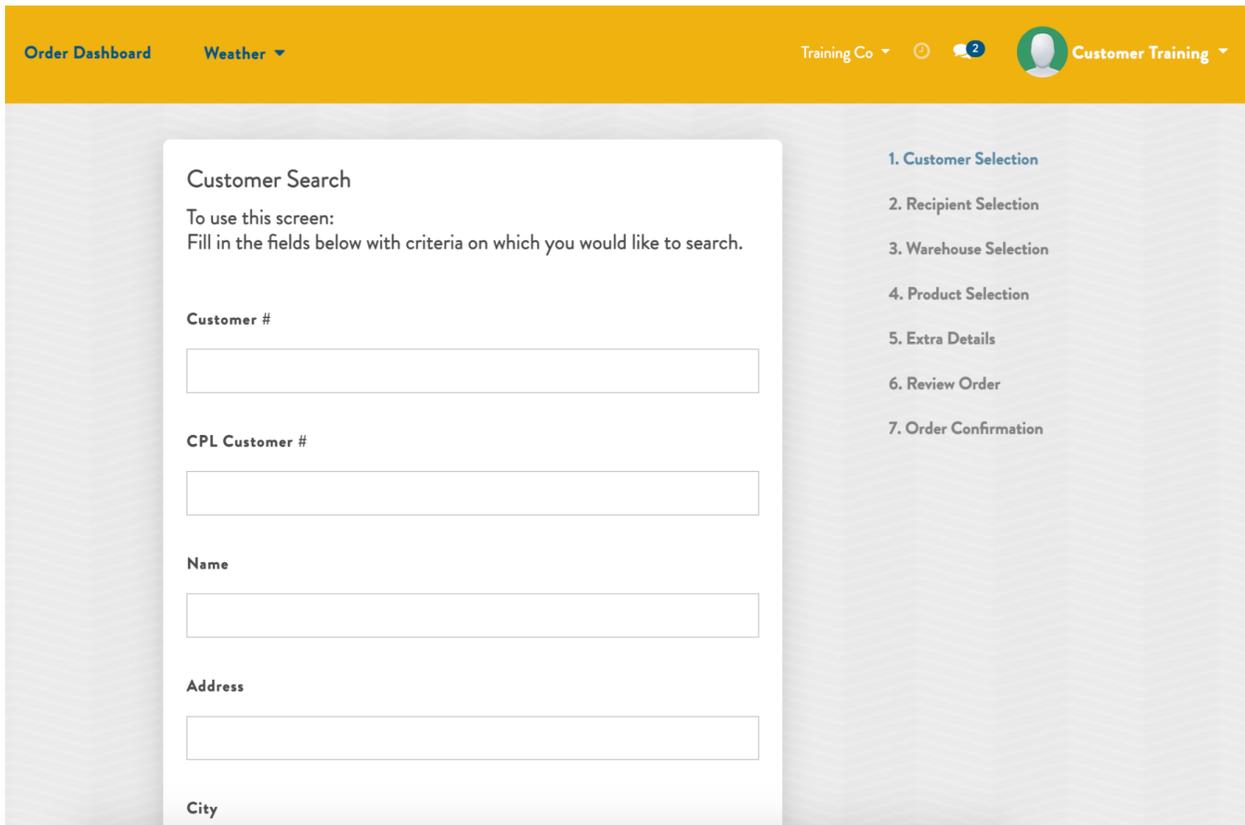
To begin a new order, click the Enter Single Order button as shown below:



This displays the following screen:



Note that you can add a new Customer here by clicking “No, add a new customer.” Or you may click “Yes, look up the customer” brings us to the Customer Search, as shown below:



You can complete any, all or none of the fields above. Scroll down and enter "Training" for the Name field and hit Next, as shown below:

The screenshot shows a form titled "7. Order Confirmation" with a yellow header bar. The header bar contains "Order Dashboard", "Weather", "Training Co", and "Customer Training". The form fields are: "CPL Customer #", "Name" (containing "Training"), "Address", "City", "State", "ZIP", and "Country". At the bottom, there are "Cancel", "Back", and "Next" buttons. Red arrows point to the "Name" field and the "Next" button.

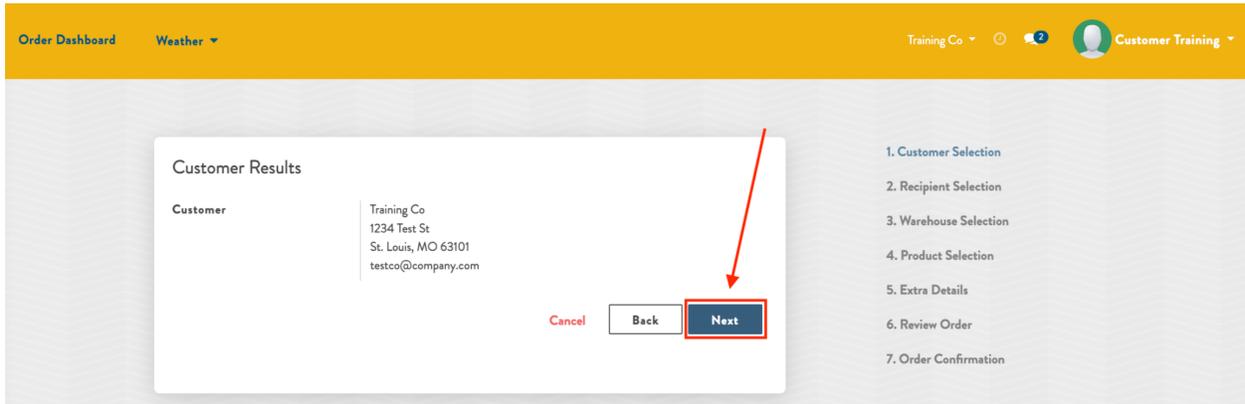
This displays all Customers with "Training" in the name.

Select "Training Co" as shown below:

The screenshot shows a modal window titled "Customer Results" with a yellow header bar. The header bar contains "Order Dashboard", "Weather", "Training Co", and "Customer Training". The modal contains the following text: "Customer Results", "To use this screen:", "Listed below are the customers that match your search criteria. Click on a customer to use it in this order." Below this is a table with two columns: "Name" and "Contact Information". The table has two rows: "Joe Training" with "100 Michigan Ave Chicago IL 60622 United States" and "Training Co" with "1234 Test St St. Louis MO 63101 United States". The "Training Co" row is highlighted with a red border. At the bottom of the modal are "Cancel" and "Back" buttons. To the right of the modal is a vertical list of steps: "1. Customer Selection", "2. Recipient Selection", "3. Warehouse Selection", "4. Product Selection", "5. Extra Details", "6. Review Order", and "7. Order Confirmation".

Name	Contact Information
Joe Training	100 Michigan Ave Chicago IL 60622 United States
Training Co	1234 Test St St. Louis MO 63101 United States

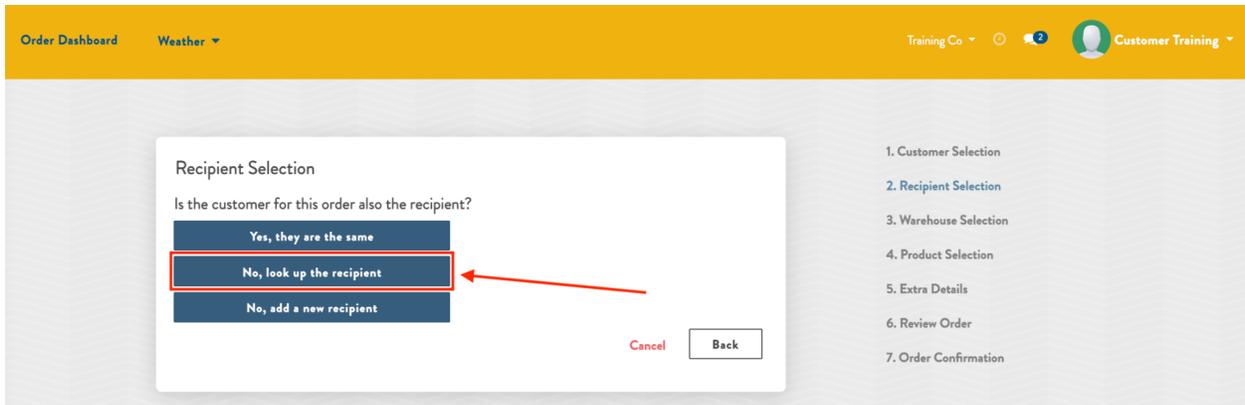
On the next page confirm the selection and click Next, as shown below:



Next is the Recipient Selection. The page displays the following three options:

- Yes, they are the same (as the Customer)
- No, look up the recipient
- No, add a new recipient

Choose "No, look up the recipient" as shown below:



The following screen has the same fields as the Customer look up. This time, complete the state field with Missouri and hit Next, as shown below:

Order Dashboard Weather ▾ Training Co ▾ Customer Training ▾

Name

Address

City

State

mo ▾

- Republic of Mordovia (RU)
- Modena (IT)
- Missouri (US)**
- Aomori (JP)
- Kumamoto (JP)
- American Samoa (US)
- Bergamo (IT)
- Search More...

Cancel Back Next

This will display all Recipients located in Missouri.

Select "Training Co" as shown below:

Order Dashboard Weather ▾ Training Co ▾ Customer Training ▾

Recipient Results

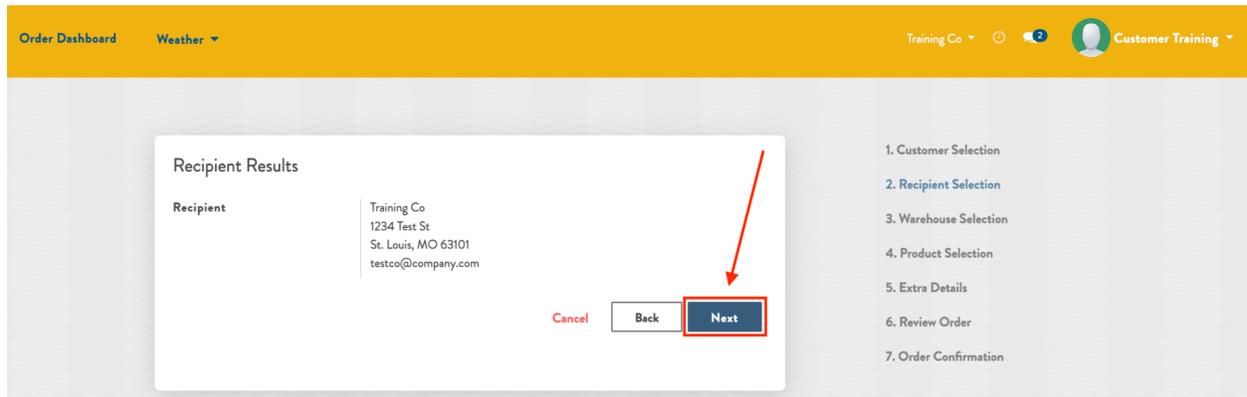
To use this screen:
Listed below are the recipients that match your search criteria. Click on a recipient to use it in this order.

Name	Contact Information
David Wright	16308 Autumn View Terr suite 34 Saint Louis MO 63141 United States
Joe June TEST	1160 Research Blvd St Louis MO 63132 United States
June Test	1160 Research Blvd St Louis MO 63132 United States
T3ST	1160 Research Blvd St Louis MO 63132 United States
TEST	1160 Research Blvd St Louis MO 63132 United States
Test	1160 Research Blvd St Louis MO 63132 United States
Training Co	1234 Test St St. Louis MO 63101 United States

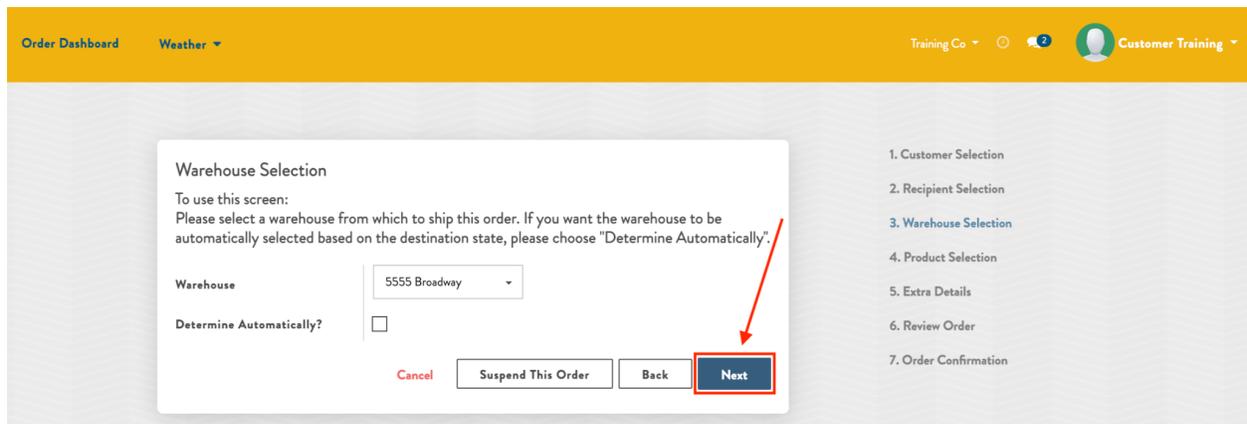
Cancel Back

- 1. Customer Selection
- 2. Recipient Selection**
- 3. Warehouse Selection
- 4. Product Selection
- 5. Extra Details
- 6. Review Order
- 7. Order Confirmation

On the next page, confirm the selection and click Next:



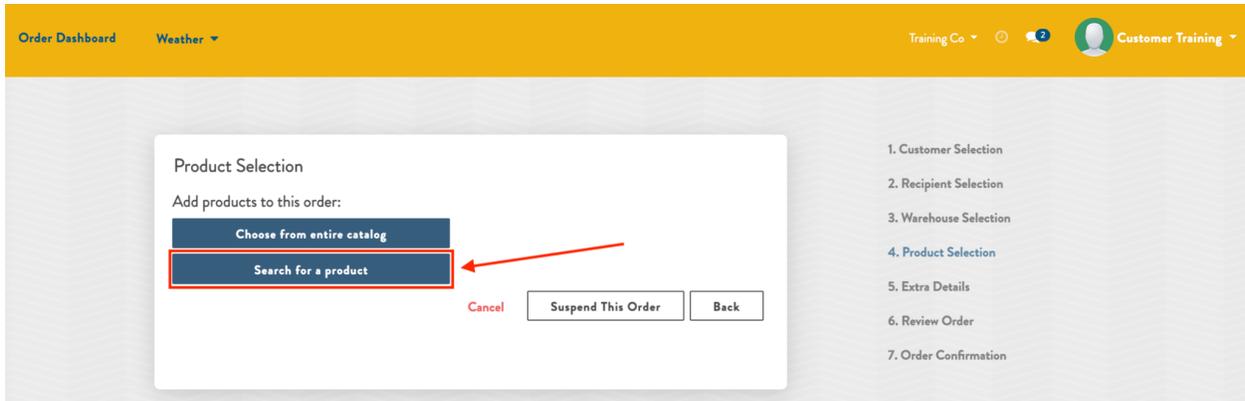
Next is the Warehouse selection. For this example, leave the Broadway warehouse and click Next.



Next is Product Selection. Here there are two options:

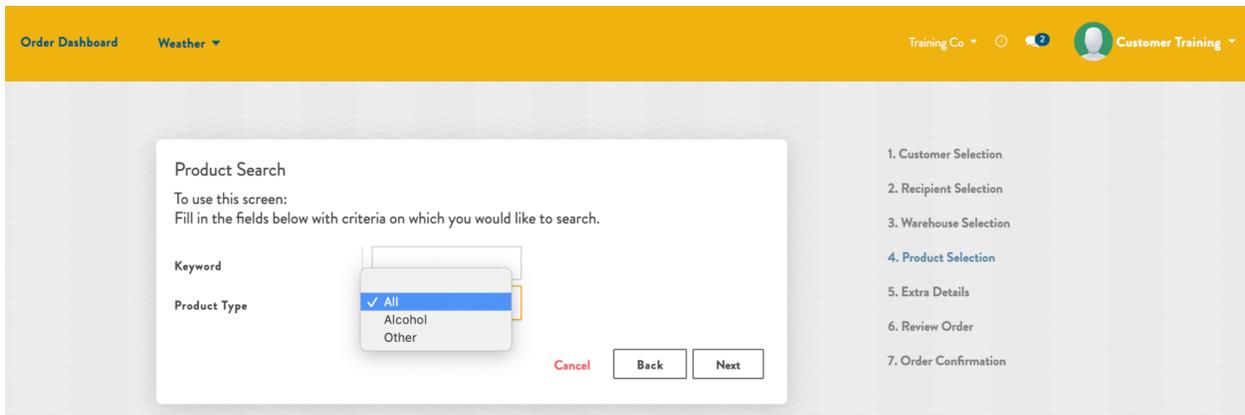
- Choose from entire catalog
- Search for a product

Click "Search for a product" as shown below:

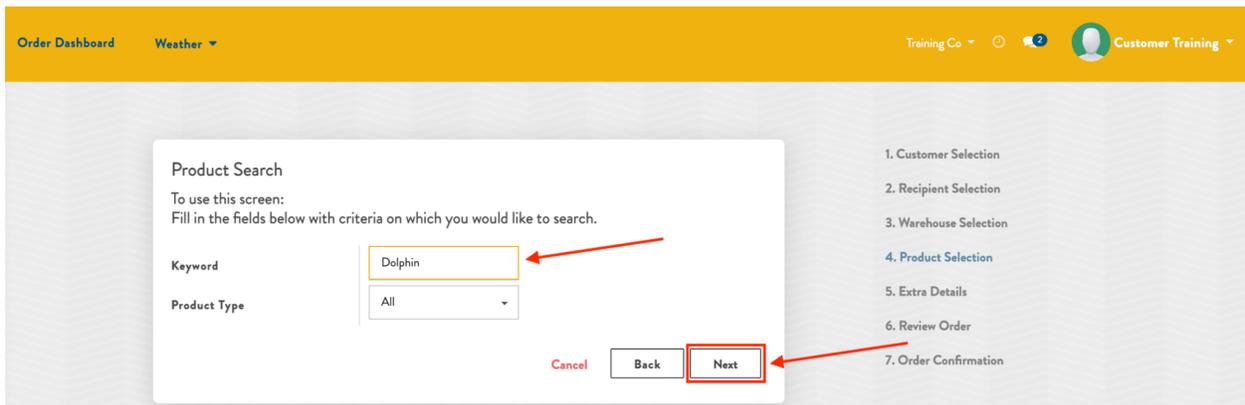


On the following Product Search screen, select the Product Type:

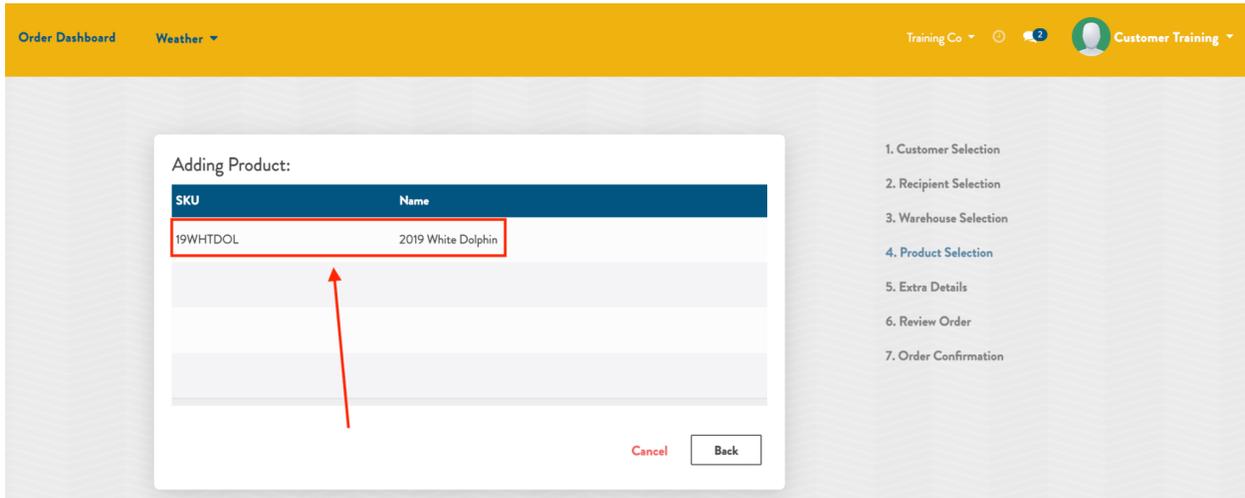
- All
- Alcohol
- Other



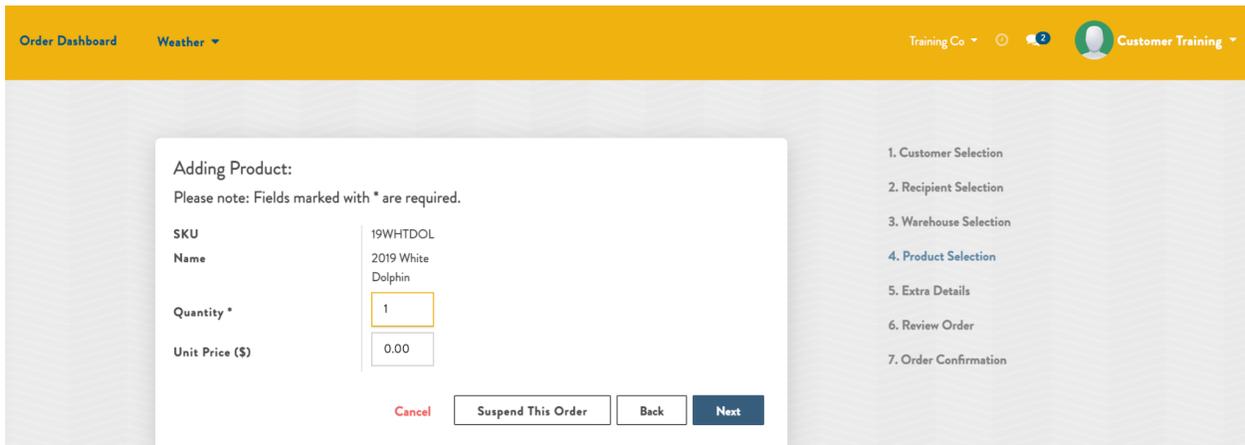
Enter a keyword by which to search. In this example, type in “Dolphin” and click Next.



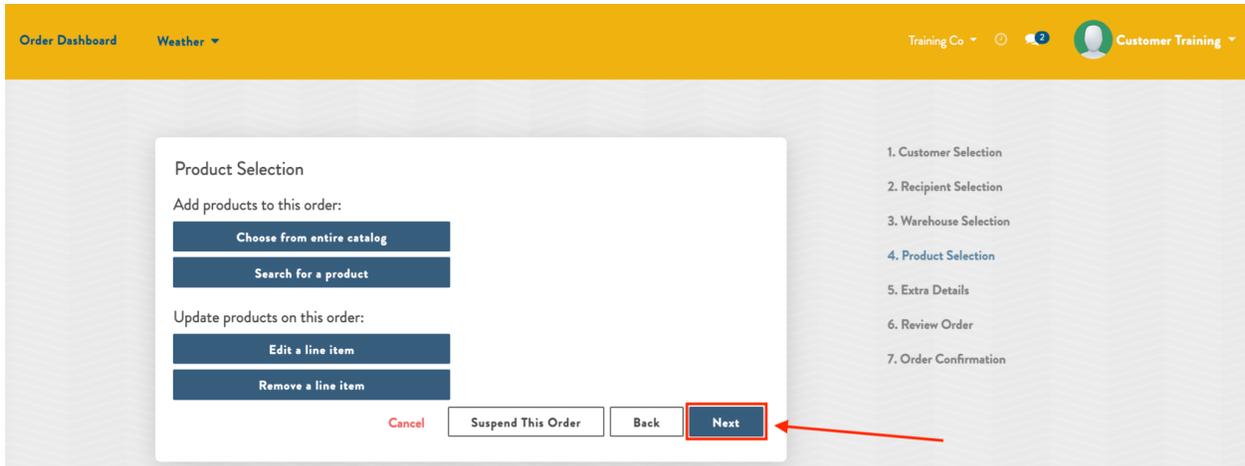
This will display all results with "Dolphin" in the title. Select the "2019 White Dolphin" as shown below:



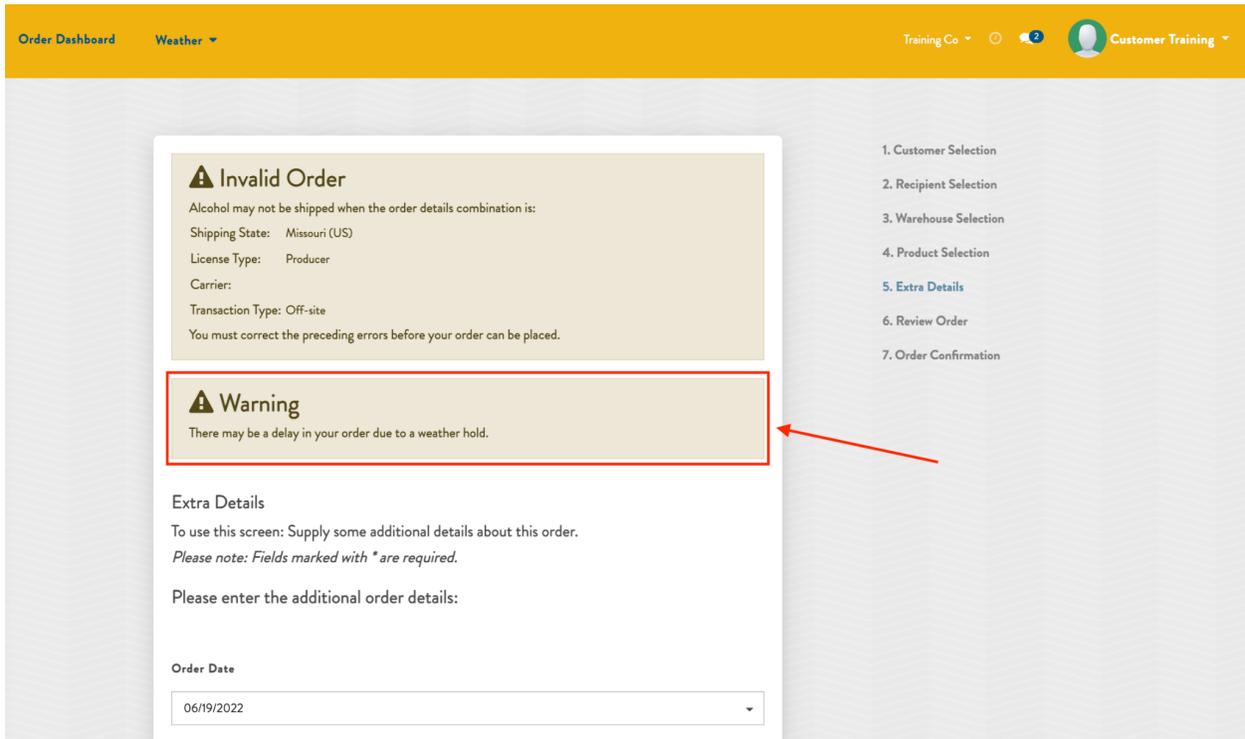
On the following screen, enter a quantity - Qty 1 / \$50 price and click Next. (Note that price is not a required field.)



Here you can add more product, and edit or remove a line item. Click Next - no need to add additional products for this example.



Here you will see a weather hold, which can be ignored by selecting “Ignore State Weather Holds” - Yes (you’ll need to scroll down further on the page).



Scroll down and enter the carrier, as shown here:

Order Dashboard Weather ▾ Training Co. 2 Customer Training ▾

Transaction Type *
Off-site ▾

Order Type *
Daily ▾

Service Level *
Standard ▾

Distribution Channel
Direct To Consumer ▾

Carrier *
▾

The customer order # is not required but it's important to enter if it's existing in the system to prevent duplication.

Order Dashboard Weather ▾ Training Co. 2 Customer Training ▾

Invalid Order
Alcohol may not be shipped when the order details combination is:
Shipping State: Missouri (US)
License Type: Producer
Carrier:
Transaction Type: Off-site
You must correct the preceding errors before your order can be placed.

Warning
There may be a delay in your order due to a weather hold.

Extra Details
To use this screen: Supply some additional details about this order.
*Please note: Fields marked with * are required.*
Please enter the additional order details:

Order Date
06/19/2022 ▾

Customer Order #
▾

1. Customer Selection
2. Recipient Selection
3. Warehouse Selection
4. Product Selection
5. Extra Details
6. Review Order
7. Order Confirmation

Once the fields are complete, click Next:

Order Dashboard Weather Training Co Customer Training

Send a Shipment Confirmation Email for This Order?

No

Gift

Is This a Gift Order?

No

Gift Message

Weather Hold

Ignore State Weather Holds

No

Manual Weather Hold

No

Manual Weather Hold Notes

Cancel Suspend This Order Back Next

On the next screen, review all details and click Submit to confirm the order.

Order Dashboard Weather Training Co Customer Training

Customer

Training Co
1234 Test St
St. Louis, MO 63101
testco@company.com

Recipient

(CPL #)

100000382

Recipient

Training Co
1234 Test St
St. Louis, MO 63101
testco@company.com

Order Contents

SKU	Product name	Quantity Requested	Unit Price
19WHTDOL	2019 White Dolphin	1	0.00

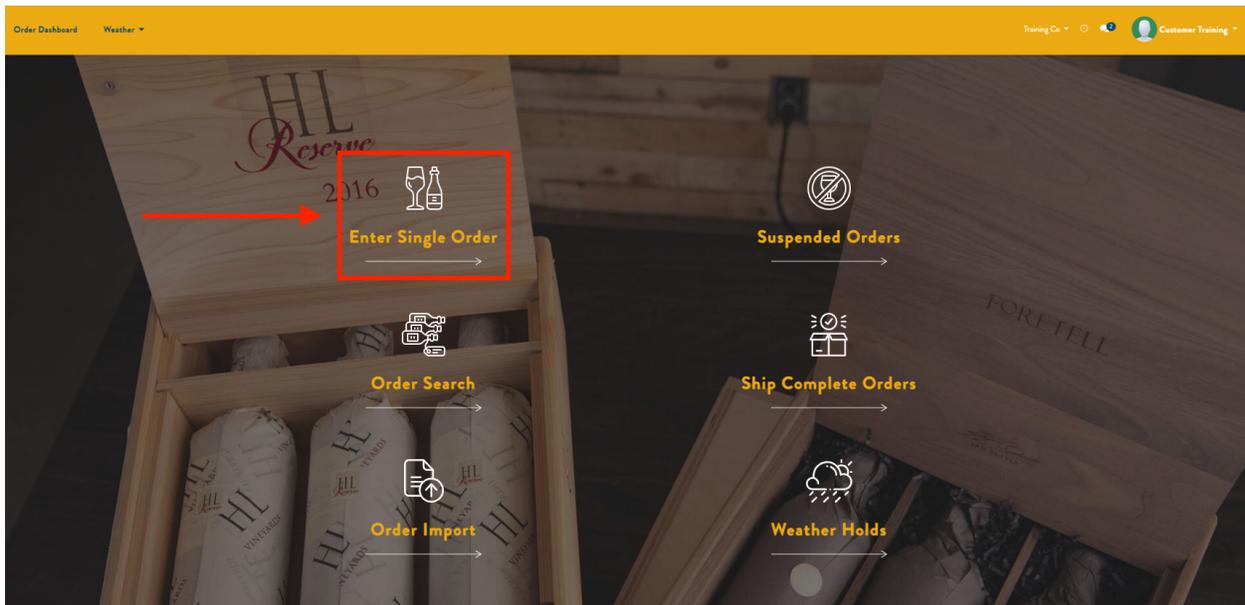
Cancel Suspend This Order Back Submit

Suspended Orders

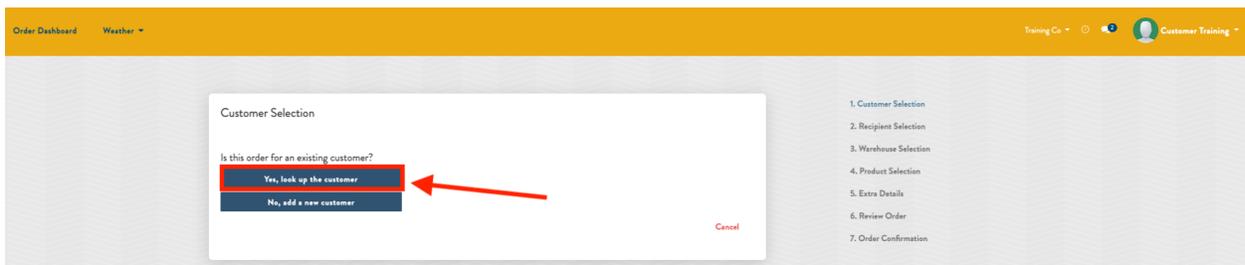
Suspended Orders have been started, but not completed. By suspending an order, you can return to it later to complete or delete it. Orders can remain in Suspended status indefinitely.

We'll begin by entering a single order and suspending it. This process will be almost identical to the Enter Single Order process above, but we will suspend the order and retrieve it afterwards to demonstrate a few more functions of the system.

From the main orders dashboard, select Enter Single Order.



Select "Yes, look up the customer" as shown below:



Do not enter any information in the Customer Search fields. Just click Next at the bottom of the screen.

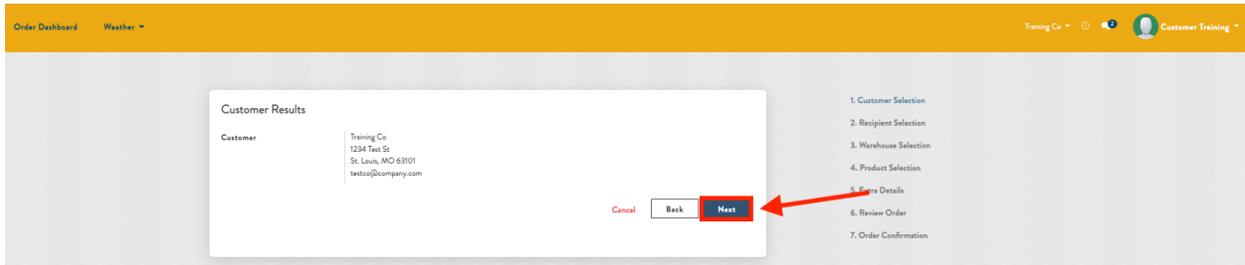
The screenshot shows the 'Customer Search' form. The 'Customer #' field contains the text 'Cu'. At the bottom of the form, there are three buttons: 'Cancel', 'Back', and 'Next'. A red arrow points to the 'Next' button. To the right of the form is a vertical list of steps: 1. Customer Selection, 2. Recipient Selection, 3. Warehouse Selection, 4. Product Selection, 5. Extra Details, 6. Review Order, and 7. Order Confirmation.

This will display an exhaustive list of available Customers. Select your desired Customer (in this example, "Training Co").

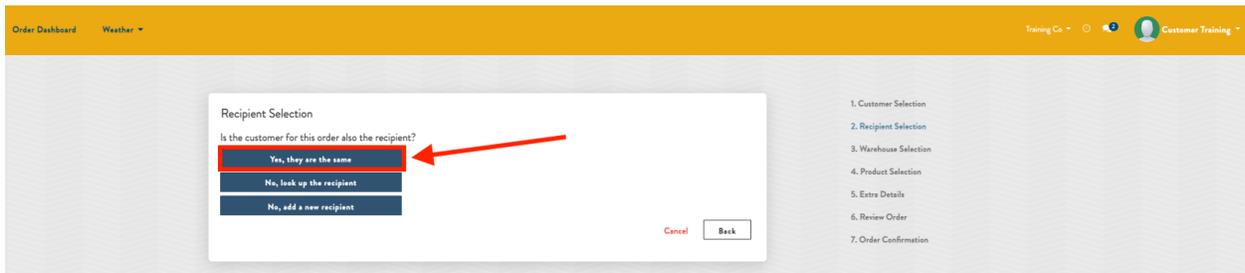
The screenshot shows the 'Customer Results' table. The table has two columns: 'Name' and 'Contact Information'. The row for 'Training Co' is highlighted with a red box. At the bottom of the table, there are 'Cancel' and 'Back' buttons. To the right of the table is the same vertical list of steps as in the previous screenshot.

Name	Contact Information
David Brock	4802 E Ray Rd #23-324 Phoenix AZ 85044 United States
David Wright	16308 Autumn View Terr suite 34 Saint Louis MO 63141 United States
Diana Wolff	18 Loch Loyal Ct New York NY 10023 United States
Jason Mangin	6098 Calderwood Hwy Tallahassee TN 37878 United States
Joe June TEST	1160 Research Blvd St Louis MO 63132 United States
Joe Training	100 Michigan Ave Chicago IL 60622 United States
June Test	1160 Research Blvd St Louis MO 63132 United States
Peter Kalley	310 W Avenida Ave San Clemente CA 92672 United States
TEST	1160 Research Blvd St Louis MO 63132 United States
TEST	1160 Research Blvd St Louis MO 63132 United States
Test	1160 Research Blvd St Louis MO 63132 United States
Tom Hanson	5682 N Highland Ave Atlanta GA 31210 United States
Tracy Moral	19 Beechwood New York NY 10021 United States
Training Co	1234 Test St St. Louis MO 63101 United States

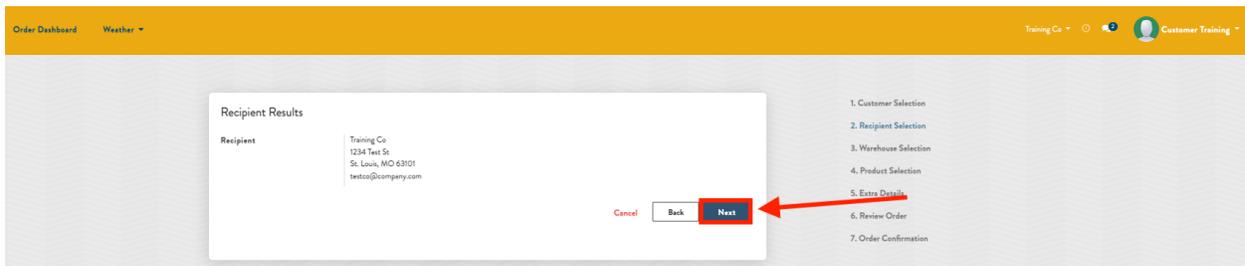
Confirm your selection by clicking Next.



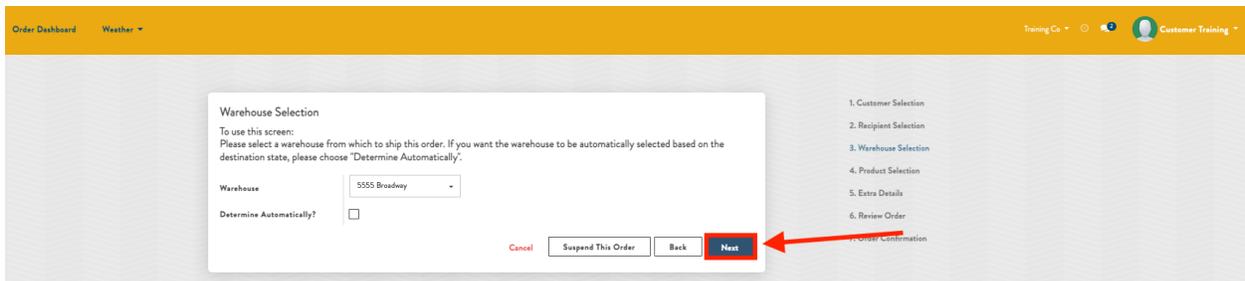
For the Recipient selection, click "Yes, they are the same" (as the Customer).



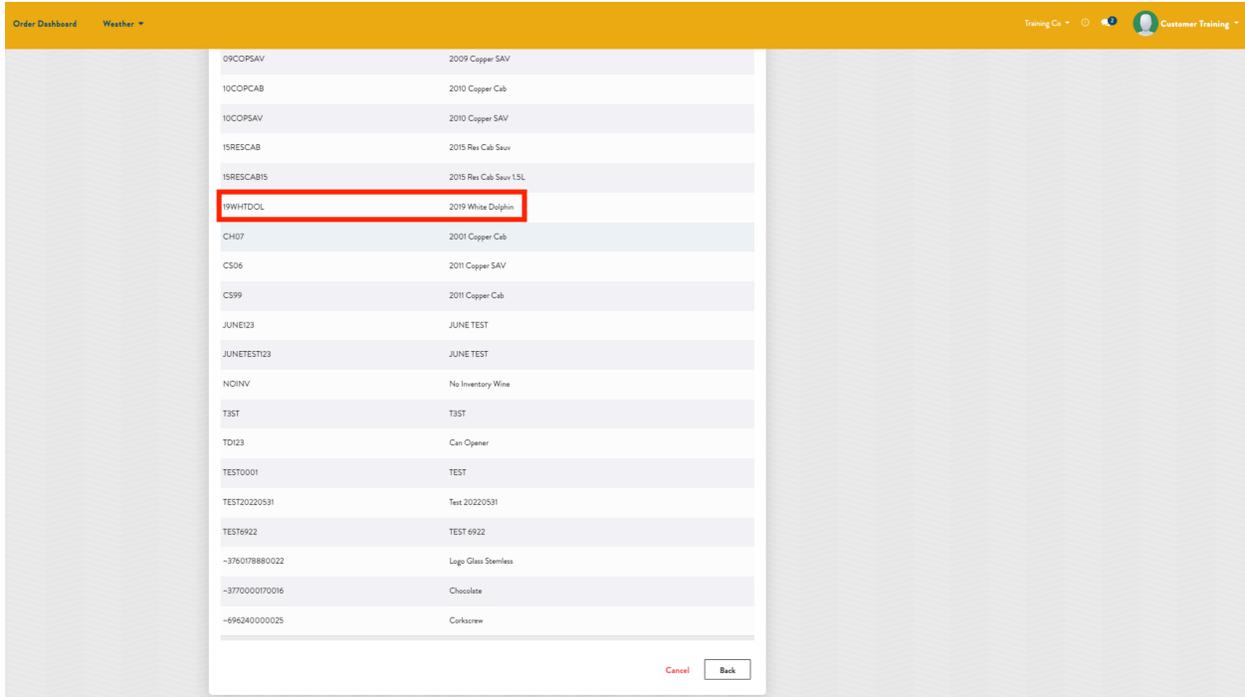
Confirm the selection by clicking Next.



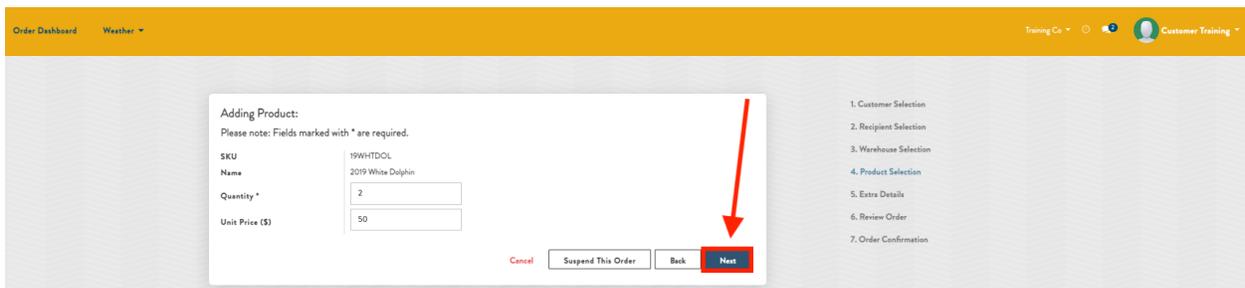
Next, make a Warehouse Selection and click Next.



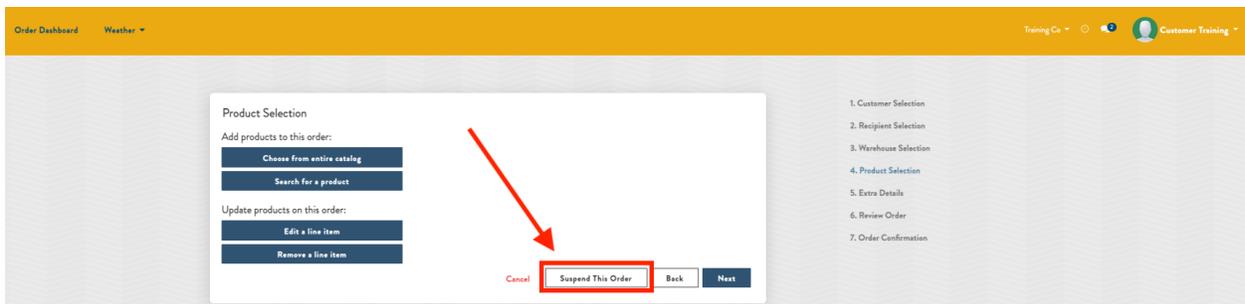
For Product Selection, you can "Choose from Catalog" which is an exhaustive list of all available products. For example, select the 2019 White Dolphin.



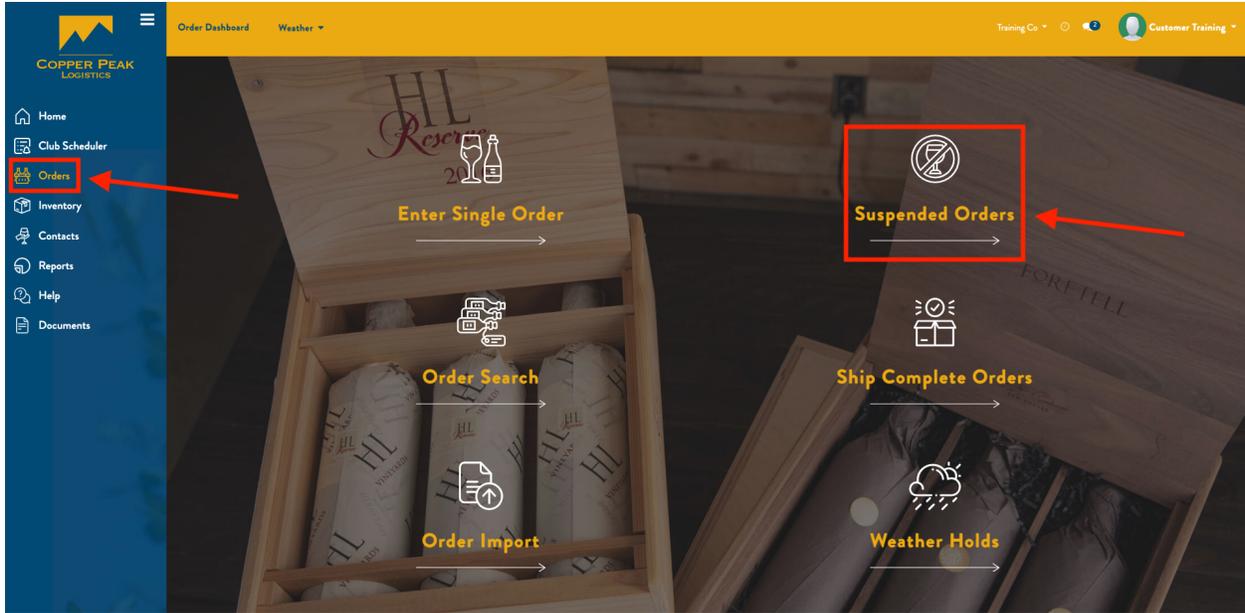
Enter a Qty and Unit Price and click Next.



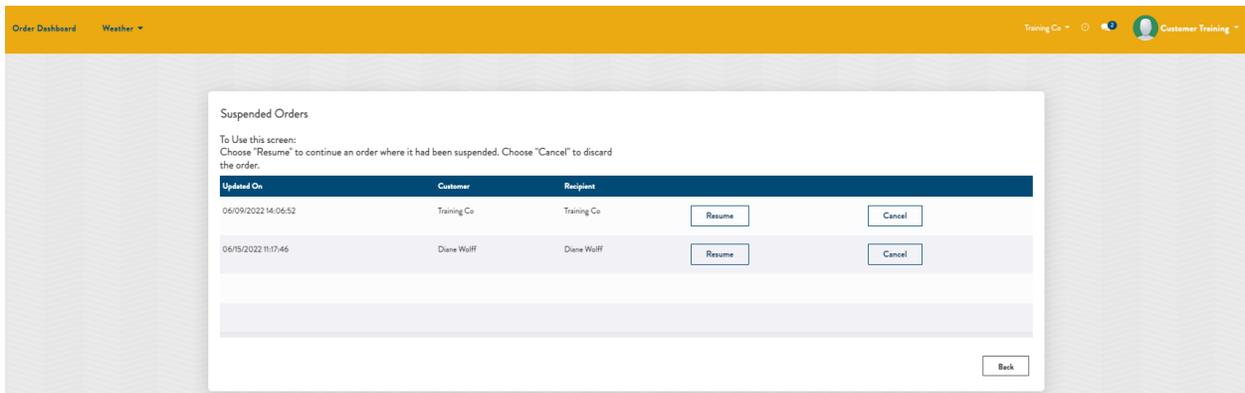
On the following screen select "Suspend This Order."



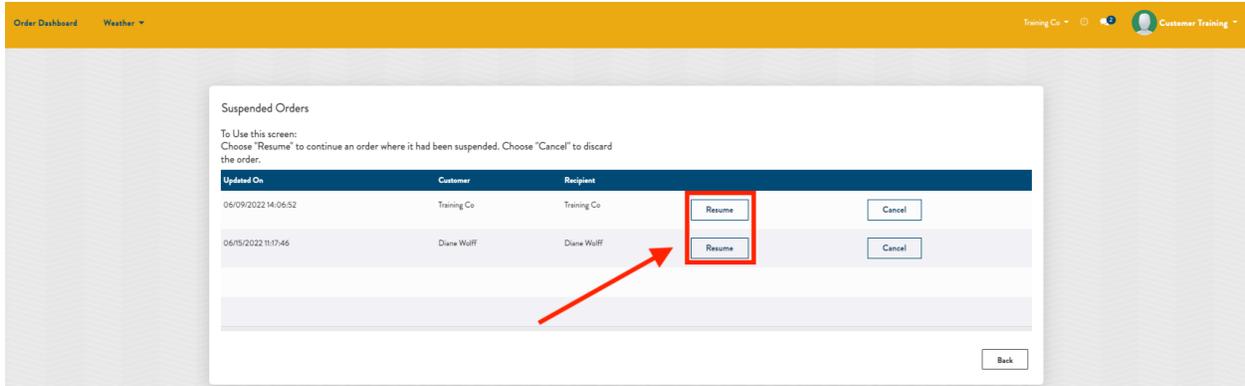
To access the order you just suspended, as well as all other Suspended Orders, go to the Orders dashboard and select Suspended Orders.



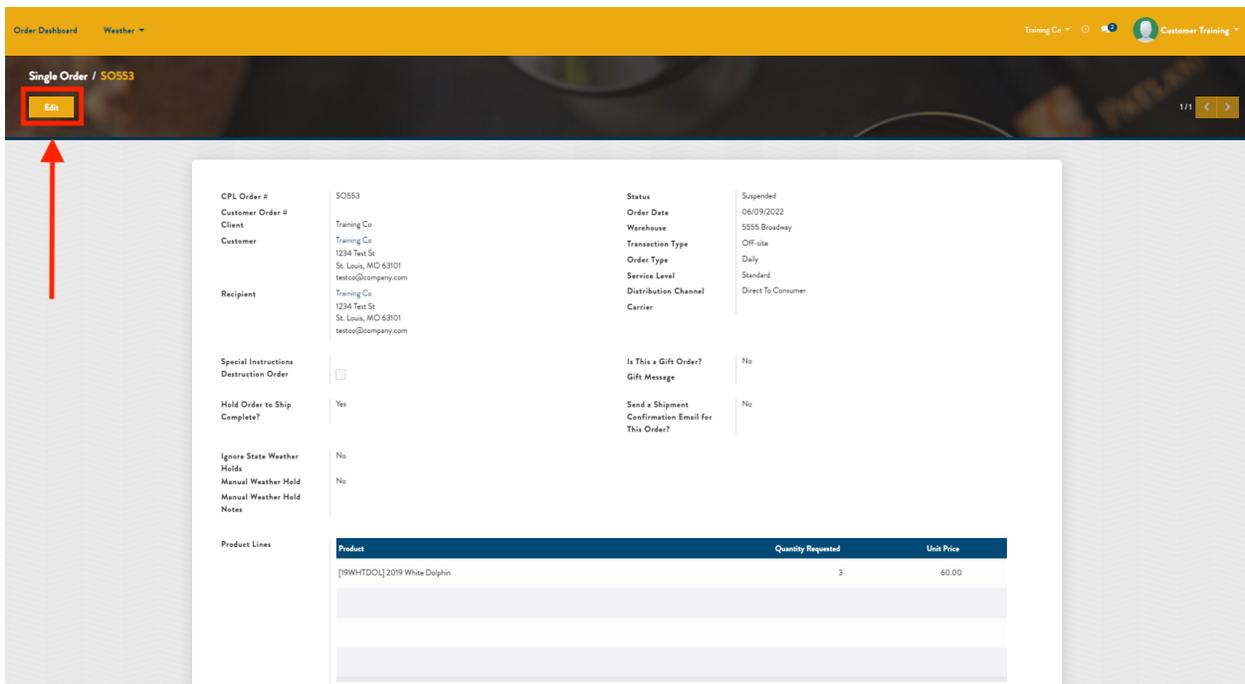
This brings up the following screen, with a list view of all Suspended Orders:



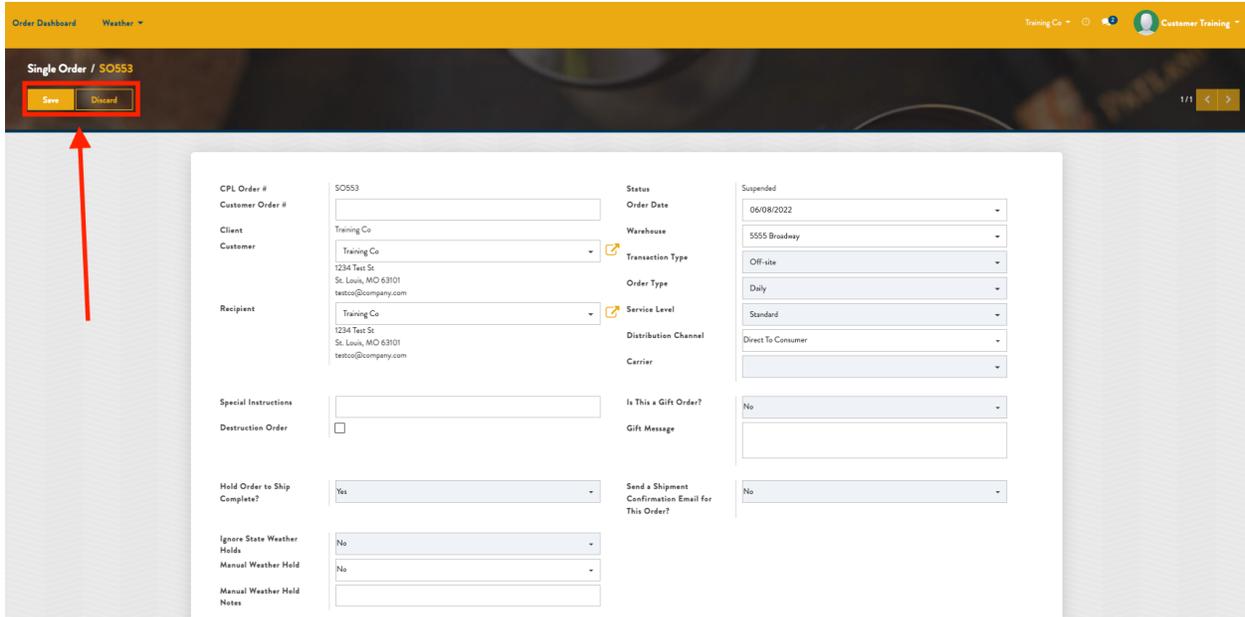
On the above screen, an order can be canceled by clicking the Cancel button, or Resumed. To Resume a Suspended Order, click the Resume button to the right of the line item you'd like to Resume.



Click Edit in the upper left corner of the screen, as shown below:



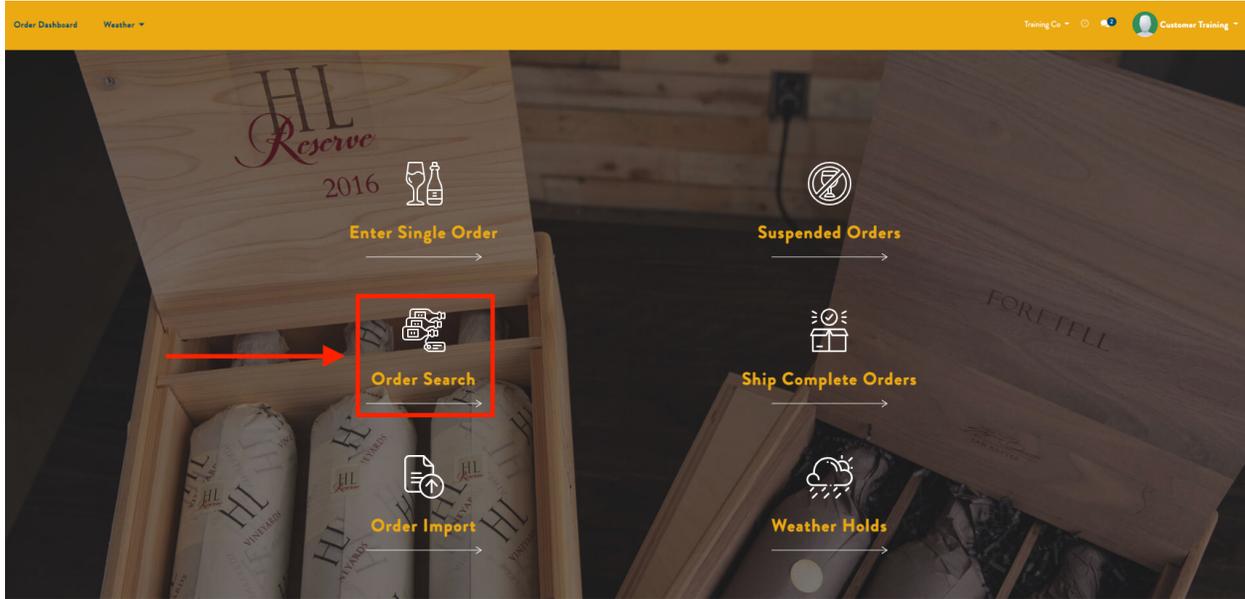
Make the desired changes and then click Save to confirm or Discard to abandon the changes:



Once the order has been updated and placed, it will no longer be visible under the Suspended Orders view.

Order Search

Order Search is available from the main Orders dashboard.



Order Search allows the user to search by Customer Order #, CPL Order #, and Order Date. Advanced Search is also available.

Advanced Search

Order #

Customer Order #

CPL Order #

Order Date

 All Search by Order Date

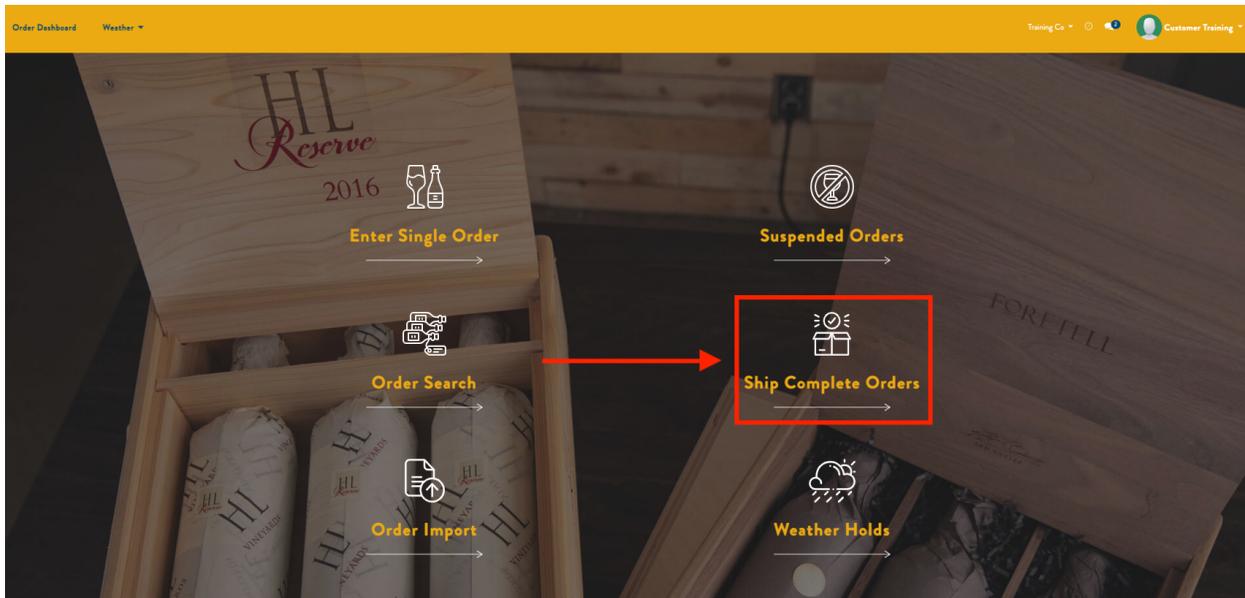
Search

Cancel

Note: you can edit any order with a status of "on order."

Ship Complete Orders

Ship Complete Orders contain items with insufficient quantities, and "yes" is selected for "Hold Order to Ship Complete" on the order. To access, select Ship Complete Orders from the main Orders dashboard.

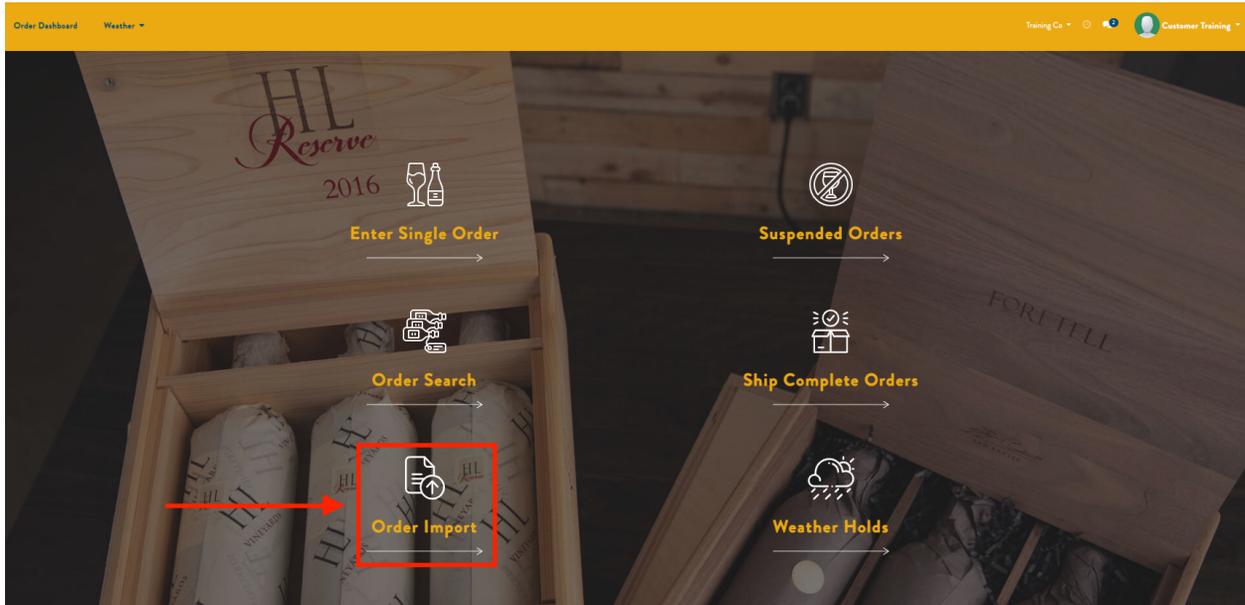


The following screen will display all Ship Complete Orders. To view a Ship Complete Order, click on the line item. This will display the details for a given Ship Complete Order. Orders can be edited from here, and if you choose a product with sufficient quantity, the order will no longer be held until Ship Complete, but will be processed normally.

Order Import

Order Import allows you to upload a CSV or XLSX file to expedite the order process when the user has all necessary information for an order.

To access, click Order Import from the main Orders dashboard:



Next, upload your file and select the Shipping Warehouse.

To use this screen:

Upload a CSV or XLSX file containing orders and specify a Shipping Warehouse. The file should be in Standard CPL format.

Download a sample CSV file in Standard CPL format [here](#).

Download instructions for using the CPL order upload service [here](#).

File Selection

File to Import

Upload your file

Shipping Warehouse

5555 Broadway

Options

Update customer data

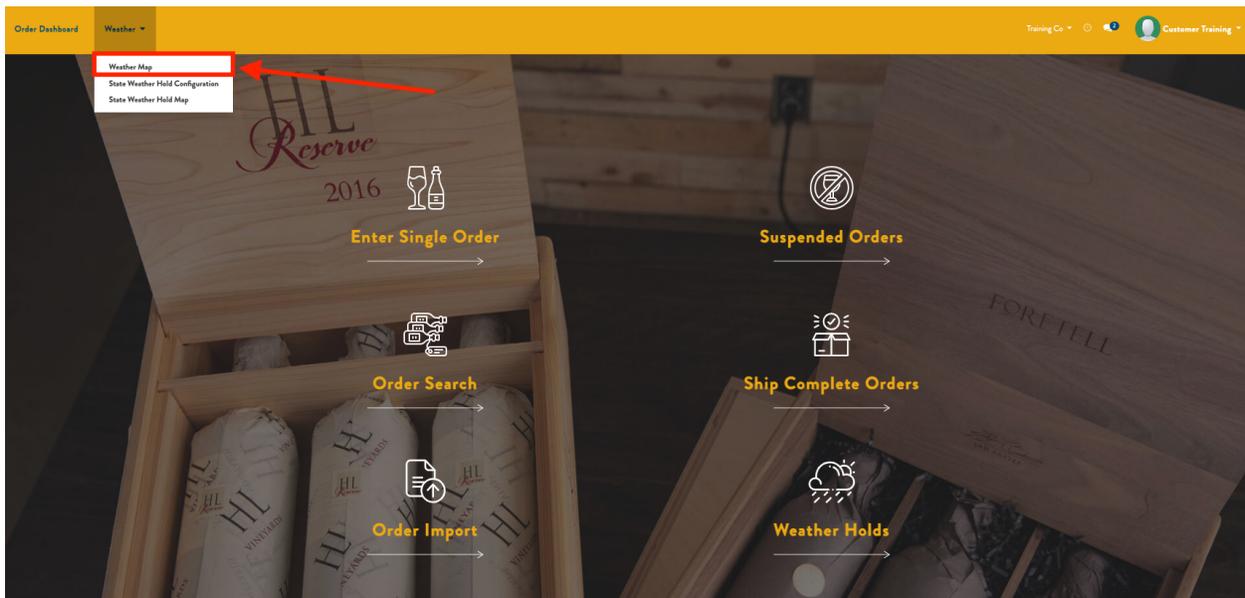
Cancel

Weather Holds

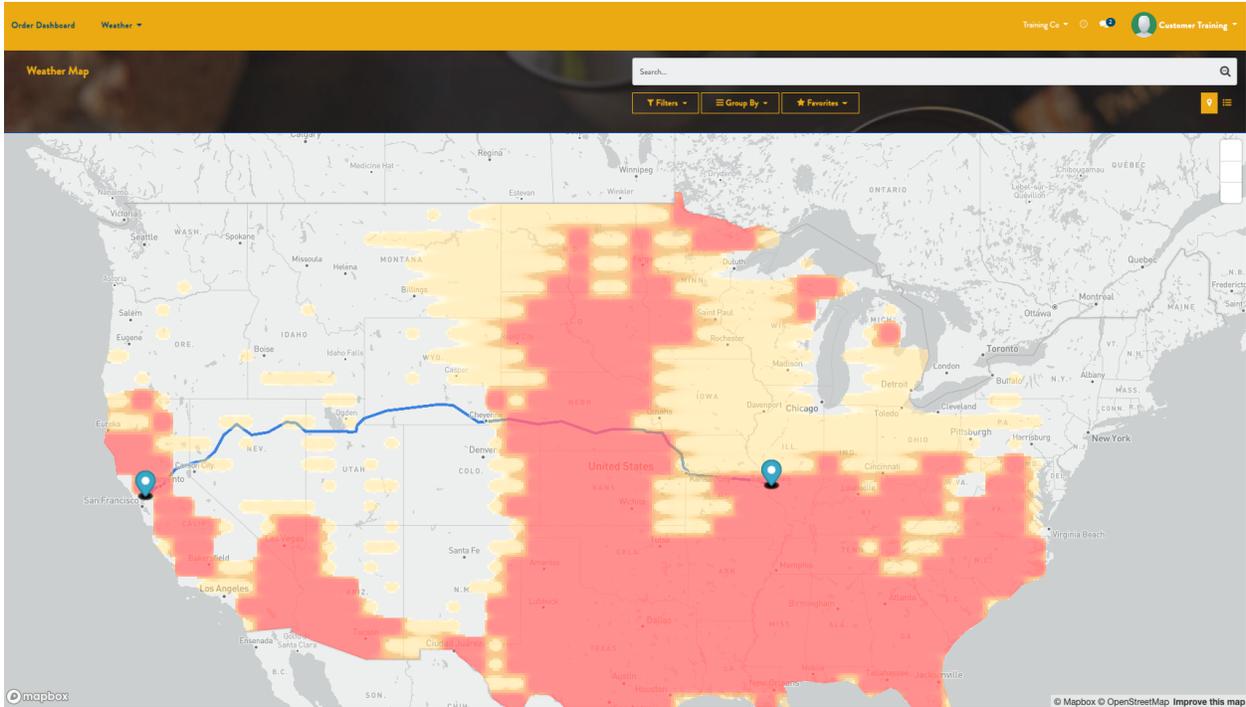
Weather Holds temporarily pause shipments to specific locations so they are not adversely affected by inclement weather. Weather Holds have a start and end date. The following will explain each aspect of a Weather Hold in more detail.

Weather Map

The Weather Map displays where there is inclement weather across the country, and can be accessed from the main Orders dashboard:



Clicking above will display the Weather Map:



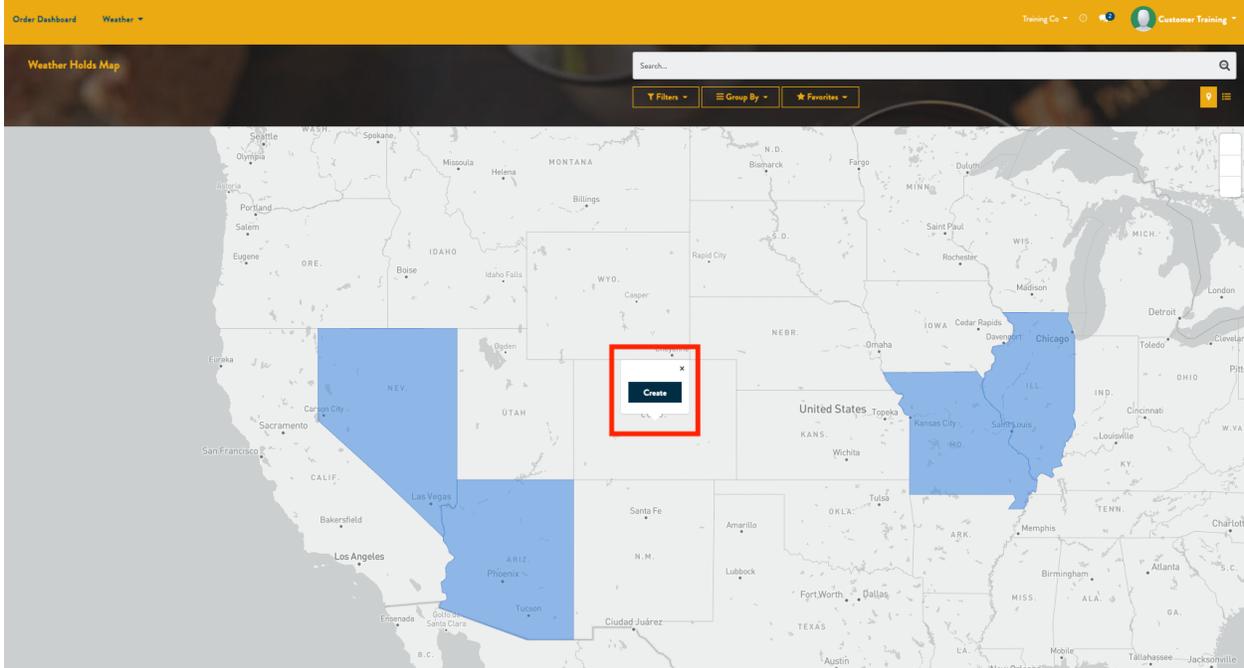
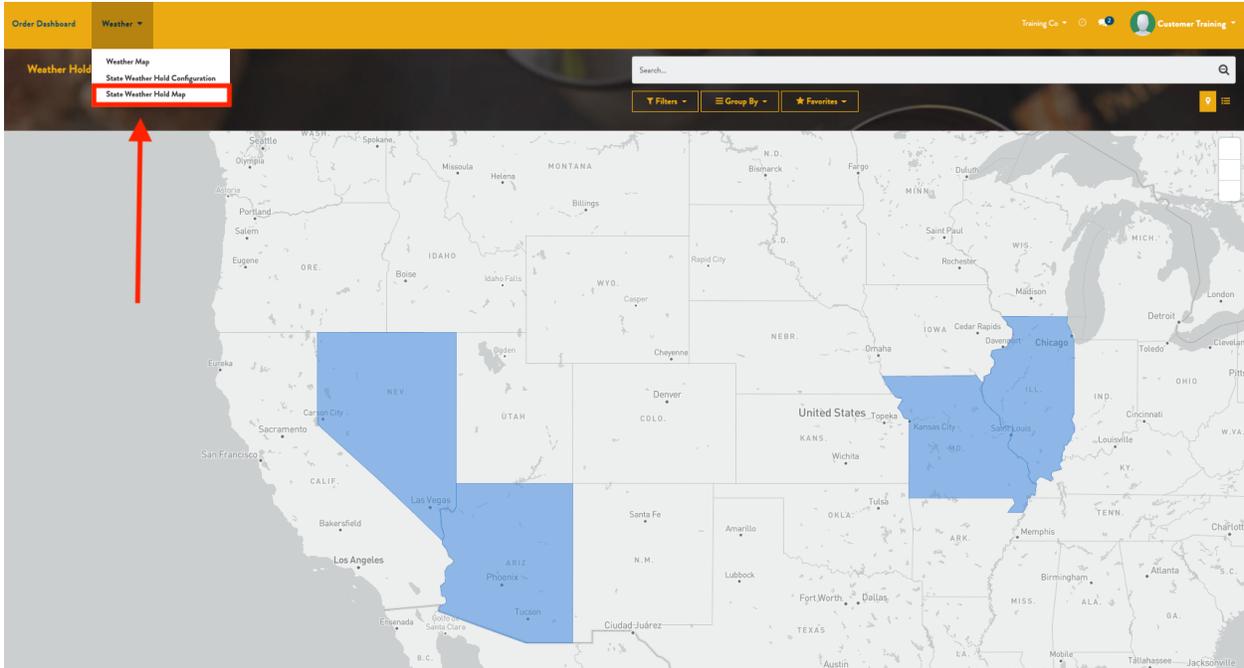
State Weather Holds Configuration

From the State Weather Holds Configuration drop down menu, you can view all current state weather holds, and create a new weather hold. This is found here:

<input type="checkbox"/>	Name	When the hold begins	When the hold ends	State on hold	Applies to all carriers	Carriers on hold
<input type="checkbox"/>	AZ-Summer 2022	05/31/2022	10/01/2022	Arizona (US)	<input checked="" type="checkbox"/>	No records
<input type="checkbox"/>	IL TEST	06/06/2022	09/21/2022	Illinois (US)	<input checked="" type="checkbox"/>	No records
<input type="checkbox"/>	MO Hold - Training Co	06/06/2022	08/07/2022	Missouri (US)	<input checked="" type="checkbox"/>	No records
<input type="checkbox"/>	NV-Summer 2022	05/31/2022	10/01/2022	Nevada (US)	<input checked="" type="checkbox"/>	No records
<input type="checkbox"/>	NY June Heat Wave	06/15/2022	06/29/2022	New York (US)	<input checked="" type="checkbox"/>	No records

Creating a Weather Hold

Weather Holds can also be created from the Weather Hold Map by clicking on a state and clicking the Create button, as shown below:



Complete the fields and click Save

- Name
- When the hold begins
- When the hold ends
- State on hold (will be selected by default)

- Carriers on hold
 - Note: you have the option of selecting all carriers via the checkbox, or choosing specific desired carriers by clicking the add a line and selecting from the carrier list

Odoo x

Name

Client

When the hold begins

When the hold ends

State on hold

Applies to all carriers

Carriers on hold

Training Co ▼

Colorado (US) ▼

Carrier	Provider
Add a line	

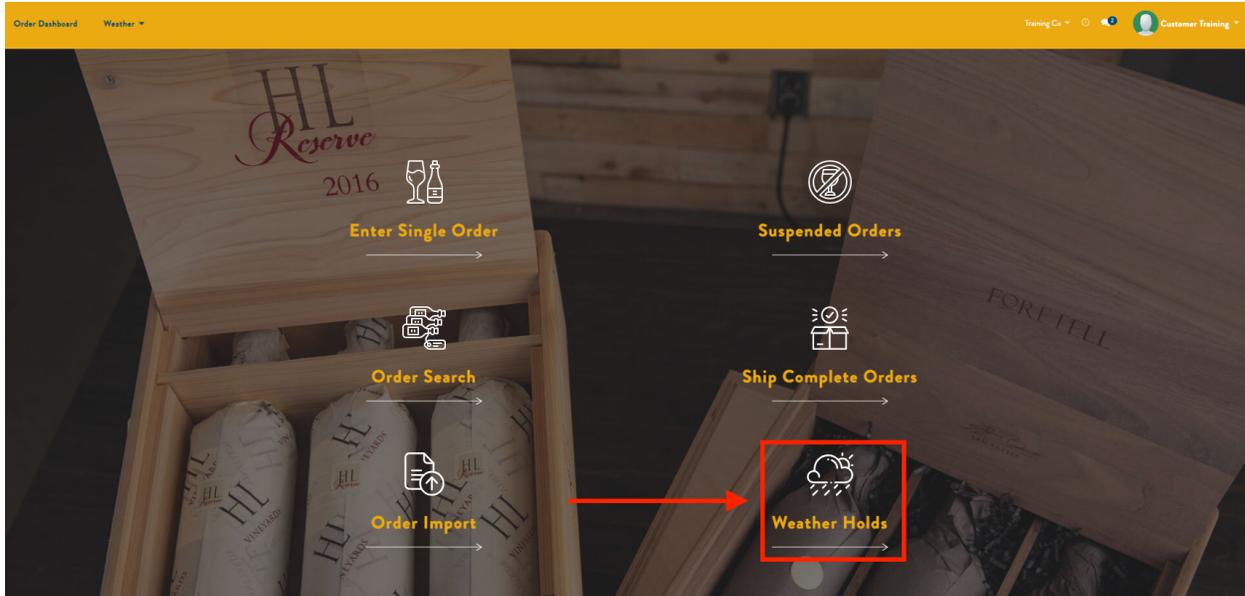
Save

Cancel

Now if you attempt to place an order for the state on weather hold a warning message will pop up and you can choose whether to ignore it or not.

Orders on Weather Hold

For a list of all orders on Weather Hold, choose Weather Holds from the main Orders dashboard as shown below:

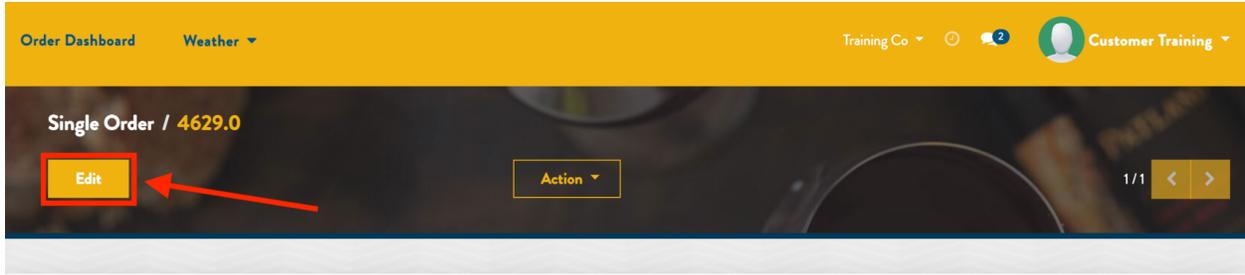


From here you can view a line item or choose to have an order “Ignore State Hold” to bypass that hold and ship it anyway.

The screenshot shows the 'Weather Holds' table in the system. The table has the following columns: 'Updated On', 'Customer', 'Recipient', 'Ignore State Hold', and 'View'. The table contains 10 rows of data, all for 'Training Co.' as both customer and recipient.

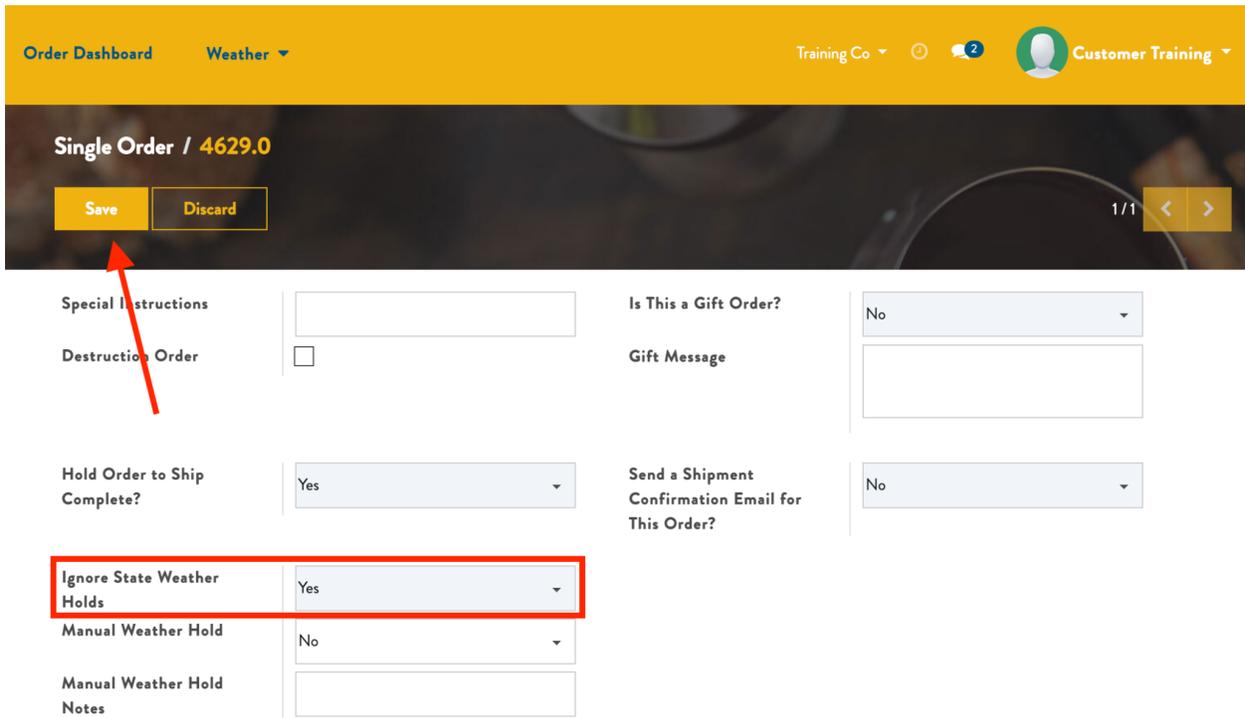
Updated On	Customer	Recipient	Ignore State Hold	View
06/20/2022 13:50:46	Training Co	Training Co	Ignore State Hold	View
06/15/2022 11:13:15	Training Co	Training Co	Ignore State Hold	View
06/15/2022 09:55:31	Training Co	Training Co	Ignore State Hold	View
06/15/2022 11:16:22	Training Co	Training Co	Ignore State Hold	View
06/13/2022 15:12:48	Training Co	Training Co	Ignore State Hold	View
06/13/2022 15:16:30	Training Co	Training Co	Ignore State Hold	View
06/09/2022 15:17:05	Training Co	Training Co	Ignore State Hold	View
06/09/2022 15:14:04	Training Co	Training Co	Ignore State Hold	View
06/09/2022 12:15:02	Training Co	Training Co	Ignore State Hold	View
06/09/2022 12:09:24	Training Co	Training Co	Ignore State Hold	View

There is another way to release an order from Weather Hold. Click View on the line item and then click Edit in the upper left corner, as shown below.



CPL Order #	4629.0	Status	Weather Hold
Customer Order #		Order Date	06/28/2022
Client	Training Co	Warehouse	5555 Broadway
Customer	Diane Wolff 18 Loch Loyal Ct New York, NY 10023 dwloff@tytesting.com	Transaction Type	Off-site
Recipient	Diane Wolff 18 Loch Loyal Ct New York, NY 10023 dwloff@tytesting.com	Order Type	Daily
		Service Level	Standard
		Distribution Channel	Direct To Consumer
		Carrier	UPS-1 DAY (UPS 1)
Special Instructions		Is This a Gift Order?	No
Destruction Order	<input type="checkbox"/>	Gift Message	

Scroll down and set "Ignore State Weather Hold" to Yes, and then click Save in the upper left corner.



This order will now be removed from Weather Hold.