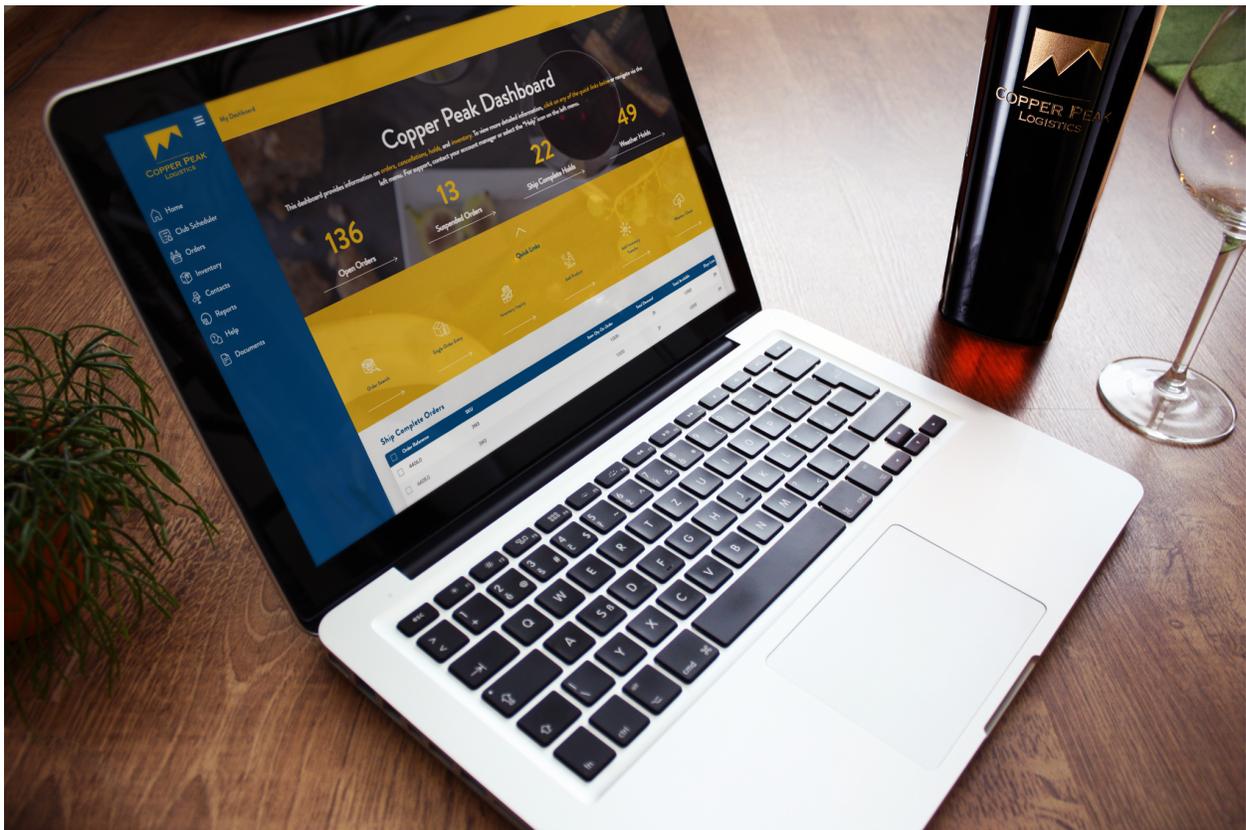




CopperLink Reports Support Documentation

For Copper Peak



The following documentation addresses the functionality under the Reports tab in the main menu, and the various reports that can be run for Orders and Inventory in the CopperLink system.

Orders Reports

Inventory Reports

Inventory Status

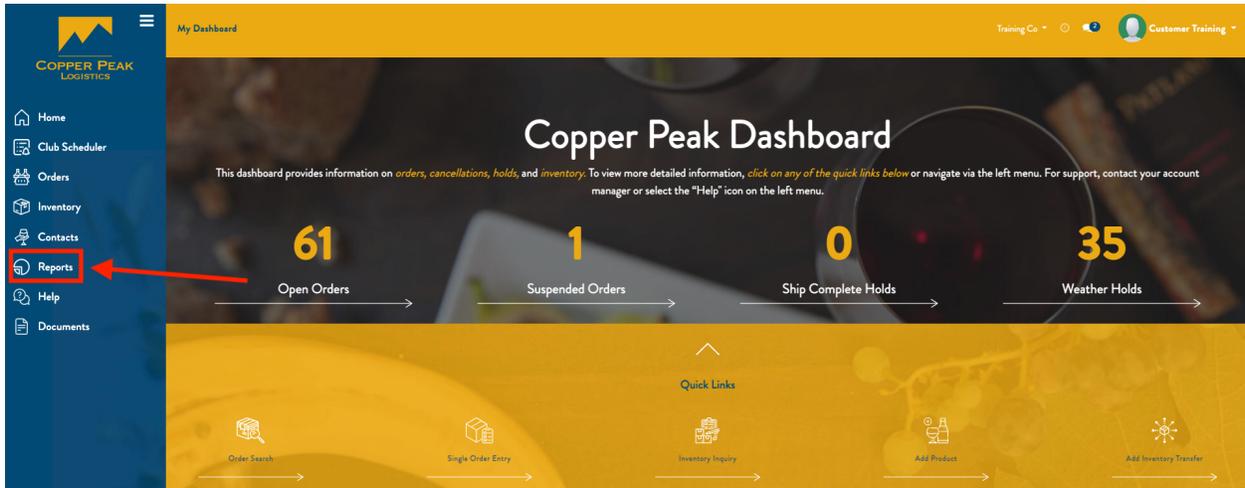
Print

Search

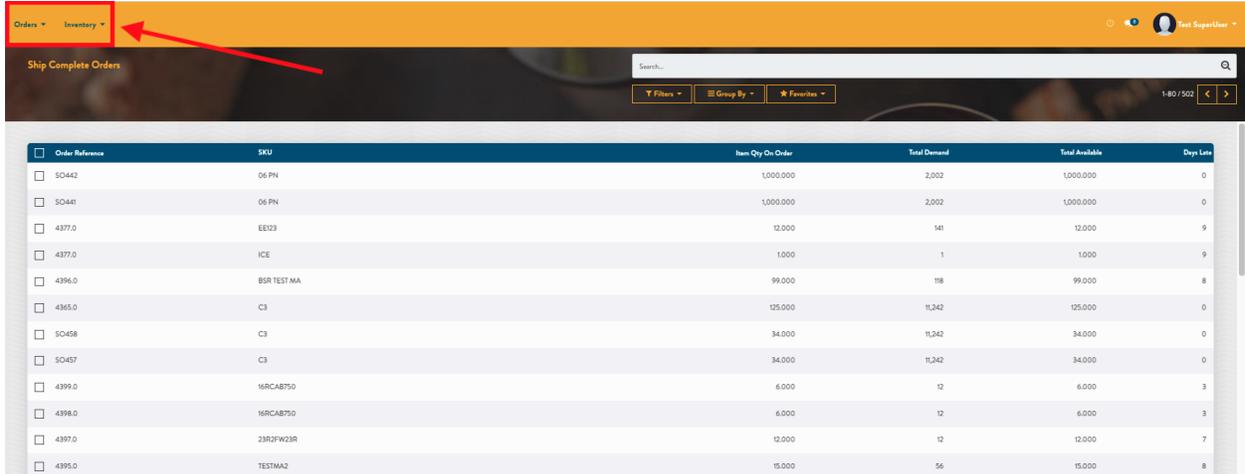
Filter, Group By, Favorites

Reports

From the Home screen, select Reports from the Main Menu options on the left.



Here, you can view a variety of different reports in a list view from the Orders and Inventory dropdown menus.



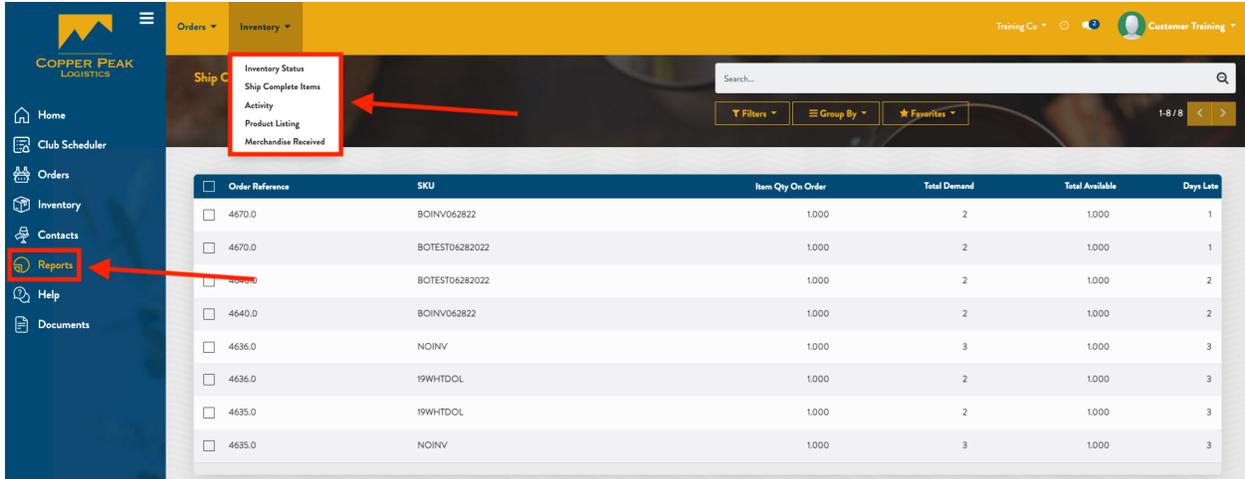
Orders Reports

- Ship Complete Orders
 - Orders pending for product
- Back Orders
 - A list of orders for product that cannot be filled at the current time due to a lack of available supply.
- Back Orders Item Summary
 - A list of the items pending on back orders
- Compliance
 - All sale orders
- Open Returns
 - Returns that either need action to be taken or are waiting for the warehouse to close out.
- Weather Holds
 - All orders on state and/or manual Weather Hold

Inventory Reports

- Inventory Status
 - General status of products
- Ship Complete Items
 - Product needed for pending orders
- Activity
 - Shows the shipped quantity by SKU
- Product Listing
 - A list of all products
- Merchandise Received

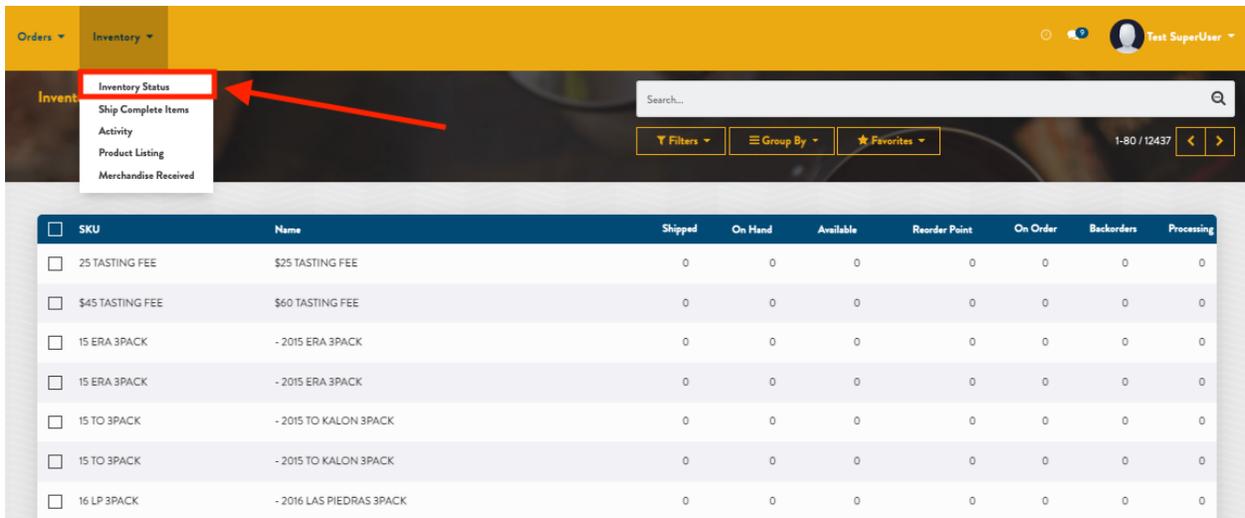
Details of product received by ASN (Advance Shipping Notice) during a specified time period. These Reports are displayed in a list view, and can be printed, filtered, grouped and added to Favorites. To access, click the Inventory dropdown from the Reports menu and select the reports you would like to view.



Note: Since each report functions the same way, we will use Inventory Status as an example.

Inventory Status

To access from the Reports menu, click the Inventory dropdown menu and select Inventory Status.



The following screen will display all Inventory Status items in a list view.

Orders ▾ Inventory ▾ Test SuperUser ▾

Inventory Status Search...

1-80 / 12437 < >

<input type="checkbox"/>	SKU	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
<input type="checkbox"/>	25 TASTING FEE	\$25 TASTING FEE	0	0	0	0	0	0	0
<input type="checkbox"/>	\$45 TASTING FEE	\$60 TASTING FEE	0	0	0	0	0	0	0
<input type="checkbox"/>	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	16 LP 3PACK	- 2016 LAS PIEDRAS 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	16 LP 3PACK	- 2016 LAS PIEDRAS 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	16 TH 3PACK	- THOMAS CABERNET SAUVIGNON 3PACK 2	0	0	0	0	0	0	0

Print

The Inventory Status items can be printed as a pdf, either individually or as a group by checking the button on the left of a line item, as shown below:

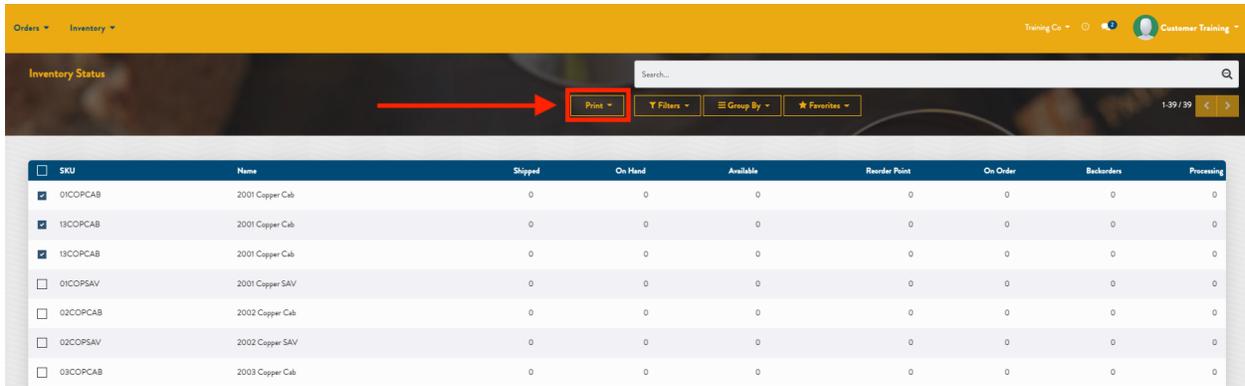
Orders ▾ Inventory ▾ Training Co. ▾ Customer Training ▾

Inventory Status Search...

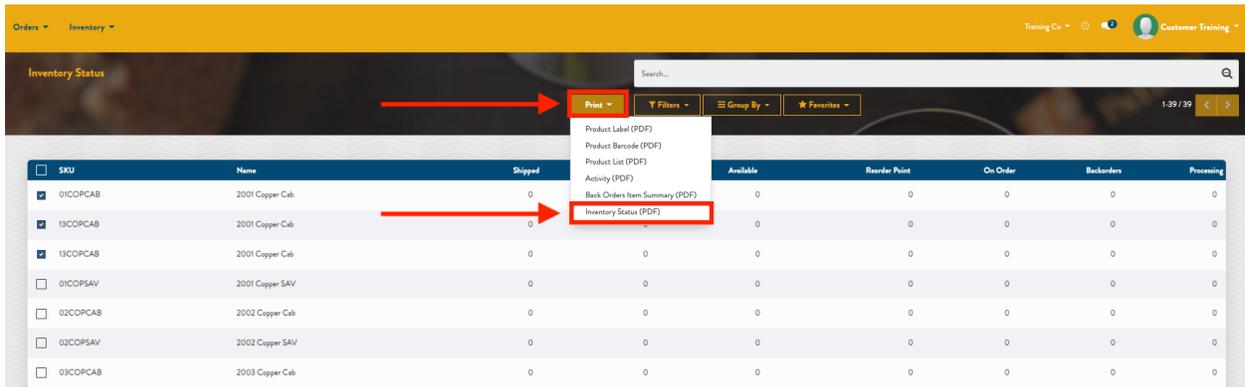
1-39 / 39 < >

<input type="checkbox"/>	SKU	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
<input checked="" type="checkbox"/>	01COPCAB	2001 Copper Cab	0	0	0	0	0	0	0
<input checked="" type="checkbox"/>	12COPCAB	2001 Copper Cab	0	0	0	0	0	0	0
<input checked="" type="checkbox"/>	13COPCAB	2001 Copper Cab	0	0	0	0	0	0	0
<input type="checkbox"/>	01COPSAV	2001 Copper SAV	0	0	0	0	0	0	0
<input type="checkbox"/>	02COPCAB	2002 Copper Cab	0	0	0	0	0	0	0
<input type="checkbox"/>	02COPSAV	2002 Copper SAV	0	0	0	0	0	0	0
<input type="checkbox"/>	03COPCAB	2003 Copper Cab	0	0	0	0	0	0	0

When line items are selected, a new menu option appears in the upper center of the screen - the Print menu, as shown here:

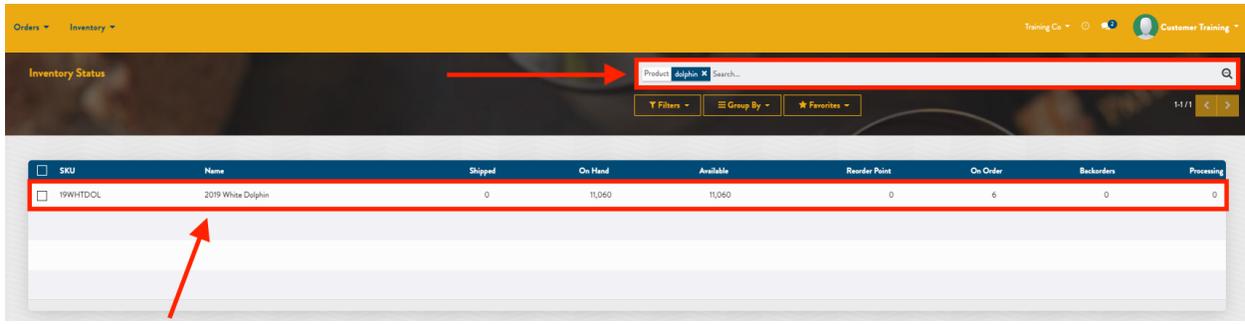


To print, select the Print dropdown menu and select the report you would like to print. This will download a pdf of the selected Inventory Status reports.



Search

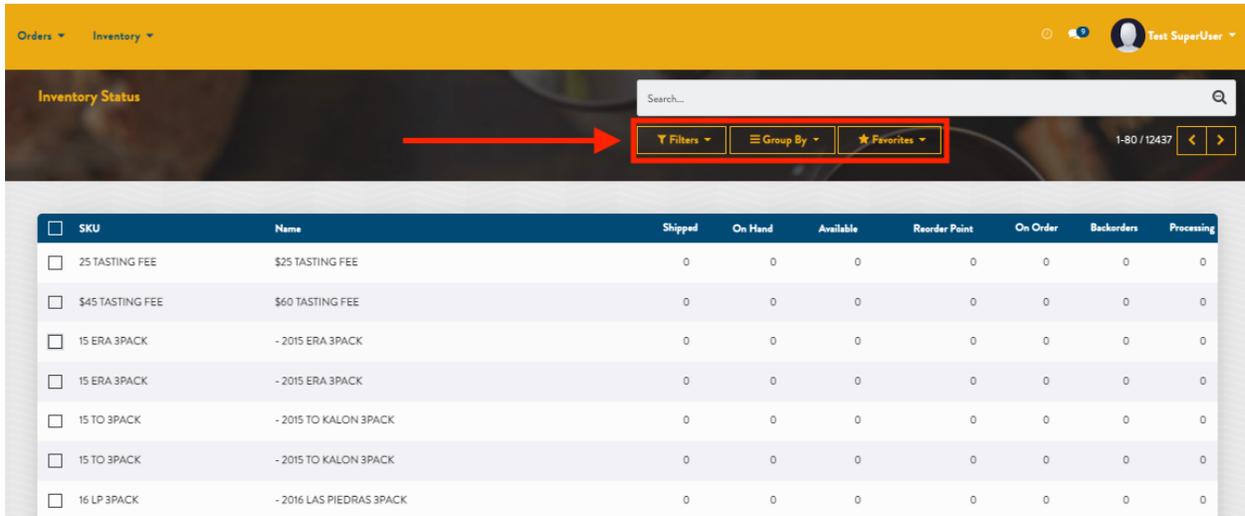
Reports can be searched by typing keywords into the search bar at the top of the page. In the example below, we will search "dolphin" to find any reports with dolphin in the title.



Click the "x" to the right of "dolphin" in the search to clear it. This will return an exhaustive list of Inventory Status reports.

Filter, Group By, Favorites

Like many other menus, Inventory Status can be Filtered, Grouped By and added to Favorites. See the General Functions Support Documentation for more information.



The screenshot shows the 'Inventory Status' page in a web application. At the top, there is a navigation bar with 'Orders' and 'Inventory' menus. A search bar is located at the top right, with the text 'Search...'. Below the search bar, there are three buttons: 'Filters', 'Group By', and 'Favorites'. A red arrow points to the 'Filters' button. The main content area displays a table with the following columns: SKU, Name, Shipped, On Hand, Available, Reorder Point, On Order, Backorders, and Processing. The table contains several rows of inventory items, all with zero values in the 'Shipped', 'On Hand', 'Available', 'Reorder Point', 'On Order', 'Backorders', and 'Processing' columns.

<input type="checkbox"/>	SKU	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
<input type="checkbox"/>	25 TASTING FEE	\$25 TASTING FEE	0	0	0	0	0	0	0
<input type="checkbox"/>	\$45 TASTING FEE	\$60 TASTING FEE	0	0	0	0	0	0	0
<input type="checkbox"/>	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
<input type="checkbox"/>	16 LP 3PACK	- 2016 LAS PIEDRAS 3PACK	0	0	0	0	0	0	0