

## 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

<u>Print</u>

<u>Search</u>

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 * Inventory *	_			0 📣	Text SuperUser *
Ship Complete Orders		Search			Q
		▼ Filters ▼			1-80 / 502 < >
				-	
Order Reference	sku	Item Qty On Order	Total Demand	Total Available	Days Late
SO442	06 PN	1,000.000	2,002	1,000.000	0
S0441	06 PN	1,000.000	2,002	1,000.000	0
4377.0	EE123	12.000	141	12.000	9
4377.0	ICE	1.000	1	1.000	9
4396.0	BSR TEST MA	99.000	118	99.000	8
4365.0	C3	125.000	11,242	125.000	0
SO458	C3	34.000	11,242	34.000	0
SO457	C3	34.000	11,242	34.000	0
4399.0	16RCAB750	6.000	12	6.000	3
4398.0	16RCAB750	6.000	12	6.000	3
4397.0	23R2FW23R	12.000	12	12.000	7
4395.0	TESTMA2	15.000	56	15.000	8

## **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.

≡	Orders 🔻	Inventory -			Trainin	£Co - O 🕫 🚺	
	Ship C	Inventory Status Ship Complete Items		Search			Q
Home		Product Listing Merchandise Received		▼ Filters ▼	★ Favorites ▼		1-8/8 < >
A Orders		irder Reference	SKU	Item Qty On Order	Total Demand	Total Available	Days Late
Contacts	46	670.0	BOINV062822	1.000	2	1.000	1
Reports	46	670.0	BOTEST06282022 BOTEST06282022	1.000	2	1.000	2
<ul> <li>∅ Help</li> <li>⊨ Documents</li> </ul>	46	640.0	BOINV062822	1.000	2	1.000	2
	46	636.0	NOINV	1.000	3	1.000	3
	46	636.0	19WHTDOL	1.000	2	1.000	3
	46	635.0	19WHTDOL NOINV	1.000	2 3	1.000	3

*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.

Orders *	Inventory 🔻						0 •	• 📭	
Inven	Inventory Status Ship Complete Items		Search						Q
	Activity Product Listing Merchandise Received		¥ Filters ≠	≡ Group E	By - ★ Fave	rites 🔫		1-80 / 12	437 🔇 🗲
	sku	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
	25 TASTING FEE	\$25 TASTING FEE	0	0	0	0	0	0	0
	\$45 TASTING FEE	\$60 TASTING FEE	0	0	0	0	0	0	0
	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
	16 LP 3PACK	- 2016 LAS PIEDRAS 3PACK	0	0	0	0	0	0	0

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

Orders - Inventory -						0	• 0	est SuperUser 🔻
Inventory Status		Search						Q
and the second		¥ Filters ◄	Group	By - ★ Fav	orites 🔻		1-80 / 12	437 < >
🗆 ѕки	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
25 TASTING FEE	\$25 TASTING FEE	0	0	0	0	0	0	0
\$45 TASTING FEE	\$60 TASTING FEE	0	0	0	0	0	0	0
15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
16 LP 3PACK	- 2016 LAS PIEDRAS 3PACK	0	0	0	0	0	0	0
16 LP 3PACK	- 2016 LAS PIEDRAS 3PACK	0	0	0	0	0	0	0
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 -							Treining Co 👻 🔿 🥠	Customer Training -
Inventory Status			Sea	rch				Q
			Print -	Filters →	★ Favorites →			1-39/39 < >
SKU	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
01COPCAB	2001 Copper Cab	0	0	0	0	0	0	0
I3COLCAB	2001 Copper Cab	0	0	0	0	0	0	0
И 13СОРСАВ	2001 Copper Cab	0	0	0	0	0	0	0
01COPSAV	2001 Copper SAV	0	0	0	0	0	0	0
02COPCAB	2002 Copper Cab	0	0	0	0	0	0	0
02COPSAV	2002 Copper SAV	0	0	0	0	0	0	0
03СОРСАВ	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:

Orders *	Inventory *						Trair	ingCo - O 🕫 🚺	Customer Training *
Inve	ntory Status			Search					Q
			<b>&gt;</b> [	Print - TFilters -	≡ Group By → ★	Favorites -			1-39/39 < >
	SKU	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
	01COPCAB	2001 Copper Cab	0	0	0	0	0	0	0
	13COPCAB	2001 Copper Cab	0	0	0	0	0	0	0
	13COPCAB	2001 Copper Cab	0	0	0	0	0	0	0
	01COPSAV	2001 Copper SAV	0	0	0	0	0	0	0
	02COPCAB	2002 Copper Cab	0	0	0	0	0	0	0
	02COPSAV	2002 Copper SAV	0	0	0	0	0	0	0
	03COPCAB	2003 Copper Cab	0	0	0	0	0	0	0

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.

Orders - Invent	itory =							ng 🗣 💿 📲	Customer Training *
Inventory Sta	stus			Search					Q
			Print *	Y Filters -	≡ Group By + ★ F	avorites 👻			1-39/39 < >
			Product Label Product Barco	(PDF) de (PDF)				1001141 Y	
🗌 ѕки	Name	Shipped	Product List (I Activity (PDF	PDF)	Available	Reorder Point	On Order	Backorders	Processing
01COPC	CAB 2001 Copper (	Cab O	Back Orders I	tem Summary (PDF)	0	0	0	0	0
✓ 13COPC.	CAB 2001 Copper (	Cab O	Inventory Stat	us (PDF)	0	0	0	0	0
☑ 13COPC.	CAB 2001 Copper (	Cab 0		0	0	0	0	0	0
01COP54	AV 2001 Copper S	AV 0		0	0	0	0	0	0
02COPC	CAB 2002 Copper	Cab 0		0	0	0	0	0	0
02COP5	SAV 2002 Copper	SAV 0		0	0	0	0	0	0
03COPC	CAB 2003 Copper	Cab 0		0	0	0	0	0	0

#### 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.

Orders 👻	Inventory *							•	
Inver	ntory Status		Search						Q
			 ▼ Filters ▼	Group	By - 🖈 Fave	orites 🔻		1-80 / 12	437 < >
	ѕки	Name	Shipped	On Hand	Available	Reorder Point	On Order	Backorders	Processing
	25 TASTING FEE	\$25 TASTING FEE	0	0	0	0	0	0	0
	\$45 TASTING FEE	\$60 TASTING FEE	0	0	0	0	0	0	0
	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
	15 ERA 3PACK	- 2015 ERA 3PACK	0	0	0	0	0	0	0
	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
	15 TO 3PACK	- 2015 TO KALON 3PACK	0	0	0	0	0	0	0
	16 LP 3PACK	- 2016 LAS PIEDRAS 3PACK	0	0	0	0	0	0	0