



# Lakeshore Contact Management Module

## Customer Overview



Customer Number	10000 ASI #
Name	ATTENTION!
Salesman	008 HOUSE / 002 Kaye Keady
Contact	Ms. Linda Keady
Telephone	(225)292-7424 Ext. 1000
FAX	(318)312-1502
Cell phone	(225)205-5555
Pager	
Home	(225)555-4321 Ext. K
E-mail address	lkk@lakeshoregroup.com
Web site	www.lakeshoregroup.com

Customer since:	10/22/90
Terms	CASH
Message code	04 SEE NOTES
Customer types	001 Financial
	002 MEDIUM
	003
	004
	005
Selection codes	01 Print labels
	02 Letter 1/Letter 2
	01 MICHAEL R. KLENKE
	01
	Not assigned
	Not assigned
	Not assigned

### Quick links

[Open orders](#) [Customer notes](#)

[Order history](#) [A/R notes](#)

[Invoice history](#) [A/R Detail](#)

[Quotes](#)

[Art](#) [Documents](#)

[Add'l contacts](#) [Calendar](#)

[Item availability/price](#)

[New quote for this customer](#)

[New order for this customer](#)

Recent contacts	
Date	Description
10/15/15	Order 000001 deleted by saf
8/28/17	Order 715390 deleted by kaye
8/28/17	Order 715390 deleted by kaye
<b>New</b>	New note
<a href="#">Review all contacts for this customer</a>	

A/R Aging	
Current	-1,224.32 +
Past due 1-29 days	.00 +
Past due 30-59 days	.00 +
Past due 60-89 days	.00 +
Past Due 90+ days	6,319.74 +
<b>Total</b>	<b>5,095.42 +</b>
Deposits	-676.33 +
<b>Net due</b>	<b>4,419.09 +</b>
Open Orders	1,387,293.98 +
<b>Total exposure</b>	<b>1,391,713.07</b>

Credit History	
Credit Limit	500000
<b>Average payment days</b>	
This year	167
Last year	5591
<b>Maximum Balance</b>	
Amount	93,207.15
on	10/7/15
<b>Last Payment</b>	
Amount	10.00
on	7/22/18
<b>Order information</b>	
On Order	1,387,293.98
Last Order	10/31/18

Booked Orders				
	Sales	GP	GP %	# Orders
December	.00	.00	.00	0 +
2018	534,722.61	256,156.19	47.90	62 +
2017	50,760.88	47,383.42	93.35	77 +
2016	34,252.18	22,487.65	65.65	100 +
2015	72,652.73	39,079.90	53.79	138 +
2014	61,558.79	37,252.12	60.51	142 +
Billed orders				
	Sales	GP	GP %	# Invoices
December	.00	.00	.00	0 +
2018	1,233.53	393.06	31.86	9 +
2017	928.00	665.73	71.74	3 +
2016	5,612.45	1,316.33	23.45	15 +
2015	12,915.20	10,134.95	78.47	46 +
2014	6,077.86	2,806.57	46.18	32 +

Credit Codes:														
1/15	2/15	3/15	4/15	5/15	6/15	7/15	8/15	9/15	10/15	11/15	12/15	1/16	2/16	3/16
1	1	0	0	1	0	1	0	0	1	2	0	0	0	1

Code Definition: 0=No Activity, 1=Current, 2=1-29 Past due, 3=30-59 Past Due, 4=60-89 Past due, 5=90-119 Past due, 6=120+ Past due

Exit

From the overview, you can see recent contact notes, their open A/R, their credit history with you, and their booked and billed orders. You can also access their open orders, order history, and easily generate new orders or quotes for the customer. The Prospect Overview lets you access their contact information and any quotes on file for the prospect.

# Lakeshore Contact Management Module

## Contact Notes

Contact notes are individual notes associated with one of your contacts such as customer or vendors. Unlike other types of notes like customer notes where you have one big blob of notes, contact notes are assigned a date and note number. Then, you can access each note separately and see just the notes about that particular subject.

**Update Contact Notes** MENU ★ ? V12

Customer: 900000 Name: WHITMAN LIGHTING CENTER  
Date of note: 2/7/12 Contact: Sam Whitman

Description: 2012 Spring Fun Run  
Type of contact: Personal visit  
Type of follow up: sample  
Follow up Date: 2/13/12

Notes:  
Meeting with Sam to discuss specialties for their annual spring fun run.  
They will want samples for shirts, hats, water bottles.  
Since the event will happen near St. Patrick's day this year, they are looking for slogan and/or art that incorporates some sort of "lucky" or "Irish" theme.  
Meet back with them on Monday with samples and ideas for the art.

Save Print Plus Reset Exit

If you are working on multiple projects for a customer, for example, you can keep the notes for each project separated. Or, you can record each contact with a customer.

There is an option in the Marketing Letters/Labels section to automatically update the contact notes when you do a letter or mailing.

You can also assign contact and/or follow up codes to each contact note. This lets you access the notes from the Create-A-Report so you can get a list of all the people to whom you sent Christmas cards, for example.

You can have both preset lists of common contact and follow up codes or you can enter a specific type of contact.

You can add a follow up task to your Lakeshore calendar by clicking by clicking on the Lakeshore Calendar icon (  ).

# Lakeshore Contact Management Module

**Contact Whose Notes You Want to Review** - Pick the type of contact. Then, enter that contact's ID or alias.

You can post notes related to these types of contacts:

- Customer - Click on the "customer" radio button and enter the customer's name, number or alias. You may select from the list displayed either the primary contact or any other contact you have set up for this customer.
- Prospect - Click on the "prospect" radio button and enter the prospect's name, number or alias. You may select from the list displayed either the primary contact or any other contact you have set up for this customer.
- Vendor - Click on the "vendor" radio button and enter the vendor's name, number or alias. Select the appropriate vendor from the list displayed.
- Master Salesman - Click on the "master salesman" radio button and enter the master salesman number.
- Other - Click on the "other" radio button. Enter some sort of ID information in the contact ID field such as "ABC Inc" OR "Mom". There is no look up for this type of ID.

**Start Date** - If you have a lot of notes associated with a contact, you may not want to have all of them included in the list for you to review. You can ignore older notes by putting a specific date in the start date box. If you leave the box blank, all the notes you have on file for the contact will be listed.

The start date will default to one year before the current date.

When you click the "Submit" button, the specified entries will be listed as well as a link for you to start a new note.

Once on the new screen, any notes you have on file for the contact you specified on the previous window after the start date you entered will be listed. The date of the contact will be shown as well as a short description of the subject of the note. Click on the date to review or update the note.

The last entry in the table will have a "New" icon ( **New** ) instead of a date. Click on this icon to add a new note.

# Lakeshore Contact Management Module

## Update Contact Notes

Customer: ATTENTION!  
Ms. Linda Keady

Date Description

<a href="#">7/12/11</a>	Congratulations card
<a href="#">1/ 5/12</a>	Testing contact note link
<a href="#">5/ 1/12</a>	CALL
<a href="#">11/13/12</a>	Letter 2
<a href="#">11/13/12</a>	Letter 2
<a href="#">11/13/12</a>	Letter 2
<a href="#">11/14/12</a>	Letter 2
<a href="#">12/13/12</a>	Testing
<a href="#">12/16/13</a>	Happy Monday
<a href="#">6/17/15</a>	TEST
<a href="#">10/15/15</a>	Order 000001 deleted by saf
<a href="#">8/28/17</a>	Order 715390 deleted by kaye
<a href="#">8/28/17</a>	Order 715390 deleted by kaye
<b>New</b>	Set up new note

## Lakeshore Calendar

One of the major new additions from this enhancement is the addition of a calendar integrated with other Lakeshore data.

A sample calendar for one day is shown below. The day you are reviewing will be highlighted in yellow in the actual calendar section. Each date on the calendar that has unfinished tasks will be shown in red letters.

The date will initially be assigned as the current date so you can see your tasks for the day. You may easily move to other days to see what else is pending. You can also go to a previous day if you had some tasks left unfinished.

To go to a new date, simply click on the date you want.

# Lakeshore Contact Management Module

Lakeshore calendar MENU V12

S	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29			

S	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

S	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

← Previous
Exit
Next →

Show completed entries				Add new entry						
Delete?	Cmp?	Time	Company/Contact	Overview	Contact Notes	Description	Order/Quote	Add'l Info	Schedule Follow up	Reschedule entry
<input type="checkbox"/>	<input type="checkbox"/>		Contact: Kaye Keady Telephone: 225-292-7422 E-mail: kkeady@lakeshoregroup.com		New	Commission reports due				
<input type="checkbox"/>	<input type="checkbox"/>		WHITMAN LIGHTING CENTER Contact: Sam Whitman Telephone: (504)292-1111 E-mail: lkk@lakeshoregroup.com		New Recent All	Deliver sample for 2011 Spring Fun Run				
<input type="checkbox"/>	<input type="checkbox"/>		WHITMAN LIGHTING CENTER Contact: WHITMAN LIGHTING CENTER Telephone: (504)292-1111 E-mail: lkk@lakeshoregroup.com		New Recent All	Proof due for order # 711426	Order #711426 			

You can sort the calendar data based on the information in some of the columns. To do that click on the sort icon ( ) shown in that column at the top of the page.

There are links to the customer or vendor overview, to date-stamped contact notes, to orders or quotes as well as their notes.

If you need to reschedule a task or to schedule a second follow up, it's easy to do right from this screen.

The following columns are included in the detail at the bottom of the page.

## Delete?

Once a task is complete, you may flag it for deletion. When you exit that day or the calendar, the task will be deleted.

Once the task is deleted, you cannot recapture it. It will also not appear on any of the reports described below.

# Lakeshore Contact Management Module

## *Compl?*

Once a task is complete, you may mark it as “complete”. When you exit that day or the calendar, the task will normally drop off your calendar. If you mark it as “complete” but change your mind, you can click on the “Show completed entries” link to reconfigure the calendar for that day to include completed entries.

If you don’t use the “delete” option when you finish a task but mark the task “complete” instead, then at the end of the day you can print out a list of the tasks set up for the day and which ones were completed. This could be a great way to monitor the progress of a new employee.

Tasks you don’t complete will stay on the calendar with the original date. Any day with unfinished tasks will show in read in the monthly calendar. You can move the task to a later date by clicking on the “reschedule” link.

## *Time*

If you want to assign a specific time to a task, such as for an appointment or a conference call, you can enter that time when the calendar entry is set up. You can click on the “sort” icon at the top of this column

## *Company/Contact*

In this column you will see the name of the company associated with the task as well as contact information.

## *Overview*

If the contact associated with a task is a customer, vendor, or prospect, you can see the related overview by clicking on the overview icon shown in this column



Customer Overview



Prospect Overview

# Lakeshore Contact Management Module



## Vendor Overview

### ***Contact Notes***

You can set up a new date-stamped contact note by clicking on the “New” icon.

You can see recent notes by clicking on the “Recent” link. A list of notes from the last year will be displayed.

You can see a list of ALL contact notes for the contact related to this task by clicking on the “All” link.

### ***Description***

A description of the task is shown. It will be shown in color if a priority code was assigned when it was entered. The priority code is discussed further in the discussion below on the screen where new tasks are scheduled.

### ***Order/Quote***

If the task is related to an order, you will see the order number listed. You can click on the order number to go and update the order. You may also click on the order notes icon and the “link note” to get to those functions. The “link note” function is a new function that lets you send an e-mail and have the contents of the e-mail captured in the order notes. It is described in more detail in the Order Processing section.

If the task is related to a quote, you will have the same options as for the order.

### ***Add'l Info***

If there is additional information available about the task that was entered when the task was set up, you can click on the “more detail” icon displayed () to see that information. If no additional information is available, the icon will not appear.

# Lakeshore Contact Management Module

## *Schedule Follow up*

If this task requires a follow up task, you can click on the pen/paper “update” icon (  ) in this column to call up a screen where you can enter your follow up task. Basic information such as the contact and order number will be copied to the new task screen.

## *Reschedule entry*

If you cannot complete this task for some reason and you want to schedule it for another day, you can click on the pen/paper “update” icon (  ) in this column to call up the task and modify it. You can also use this feature to enter additional information or other changes you need to make.

The follow up and rescheduling entry screens have the same format as the “Schedule item on calendar” function described below.

## **Schedule item on calendar**

Each login will have his or her own calendar. You can decide, however, when you are scheduling a task to whose calendar it will be posted. The default will be to post the entry to your own calendar. However, you can easily post to someone else’s calendar. For example, a salesman may enter an order, then post an entry for follow up to his or her assistant.

You can post the entry to multiple calendars. For example, you can put a sales meeting on everyone’s calendar by checking the boxes to post the entry to everyone’s calendar.

You may also set up priority codes. Each priority can be assigned a specific color. You can then assign the priority code to the task, based on its importance or other considerations. For example, you might assign a color based on the importance of the task. Or, you may assign a color to each person so you can see who added an entry to your calendar. Or you can assign a color to each department. Or you can assign a color based on the type of task—one color for follow up, one for ship dates, etc. This feature is optional and you can ignore it if you don’t want to use it.

The priority code will also allow you to sort your calendar entries for the day with the most important being first. If you want to use it this way but don’t need the color coding, then you can just set the colors up as black and white.

# Lakeshore Contact Management Module

Note that everyone in the company uses the same set of priority codes. However, you can assign a specific code to each user in their system options if you wish.

In addition to entering tasks on your calendar manually, you can also easily set up entries from other areas of Lakeshore. As you enter orders and other information into the system, beside many fields you will see a new icon (📅). Clicking on this icon will bring up a pop up window where you can quickly add events to your calendar.

For example, see the screen shot on the next page of part of the general information screen of the order. Notice all the red arrows pointing to the new icon. You can set up an entry on your calendar for a task or event related to any of these fields.

If you click on the icon beside the Follow up Date, you can set up a calendar entry related to that follow up. If you click on the icon beside the Ship date, you can set up a calendar entry related to the ship date.

Most of the information on the calendar entry screen will be picked up from the order or quote.

Depending on where you are when you ask for the calendar entry screen, you will have a list of possible contacts—staff (someone else in your organization), customer, vendor, decorator, salesman, prospect, or “other”(someone not on any of your files).

The description for the calendar entry will be pre-formatted but you may change it if you wish.

Order Number: 711426

**Add entry to Lakeshore Calendar**

Date: 2/9/12 Time: : AM PM End Time: : AM PM

Who will you be contacting?

- Staff Kaye Keady
- Customer 900000
- Vendor 770401
- Decorator 000050
- Salesman 001
- Other

Contact Name: Joe  
Telephone: (504)555-0111  
E-mail: kayek@lakeshoregroup.com  
Description: Follow up Date for order #711426  
Priority: Very Important

Put on Lakeshore calendar	Name
<input checked="" type="checkbox"/>	Kaye Keady sales
<input type="checkbox"/>	WHITMAN LIGHTING CENTER
<input type="checkbox"/>	SANMAR
<input type="checkbox"/>	A STITCH IN TIME
<input type="checkbox"/>	ROBERT M. KLENKE

Submit Exit

Previous Exit Done Next