

USING DOCUMENTS IN LAKESHORE

You may save various documents on the Lakeshore server and link them to any of the following entities within Lakeshore:

Orders	Accessed from order overview or any of the "Display orders by.." functions
Quotes	Accessed from quote overview or the Display Quotes function
Customers	Accessed from Customer Overview
Vendors	Accessed from Vendor/Payee Overview

For example, for a customer, you might store credit applications, logos, or correspondence. For orders, you might want to save an original handwritten order form, a copies of the vendor's invoices, or copies of e-mails to and from the customer or vendor.

The following types of files can be used as documents:

- PDF
- Excel spreadsheets
- Art files (jpg, gif, png)
- Text documents
- Word documents (requires that you have Word on your computer or a utility that lets you read Word files)

How it works

The documents you want to access are saved on the Lakeshore server. They are placed in a specific directory and the file is named according to a specific naming convention.

Then, on overviews or displays you will see either a link called **Documents** or an icon of a filing cabinet ().

When you click on the link or the icon, you will then see all of the documents associated with that entity, if any have been saved. An example from the customer overview is shown on the next page.

Click on one of the documents listed and it will be displayed in a new window on your screen. If it is a PDF, it will be called up by Adobe Acrobat. If it is a spreadsheet, it will be called up in Excel. If it is a Word document, it will be called up by Word.

If there are no documents associated with the entity, you will see a message to that effect.

There is no limit to the number of documents associated with each order, customer, etc.

The screenshot shows a web application interface with three main sections:

- Customer Overview:** A table with customer details for customer #900000, including name (WHITMAN LIGHTING CE), salesman (001 ROBERT M. KLENK), contact (Sam Whitman), telephone, and fax. Below this is a 'Recent contacts' table and an 'A/R Aging' table.
- Display document(s):** A central panel for customer #900000 showing a 'Description' box with links for 'creditapp' and 'wlc_logo'. A red arrow points to the 'creditapp' link, and a red box labeled 'Exit' is below it. A callout box says 'Click here to have the "creditapp" file displayed.'
- Quick links:** A list of navigation links such as 'Open orders', 'Customer notes', 'Order history', etc. Below this is an 'Orders' table.

Customer Number	900000
Name	WHITMAN LIGHTING CE
Salesman	001 ROBERT M. KLENK
Contact	Sam Whitman
Telephone	(504)292-1111
FAX	(504)292-2222
E-mail address	
Web site	

Date	Description
11/13/08	Delivered sample
New	New note

Category	Amount	Indicator
Current	.00	+
Past due 1-29 days	.00	+
Past due 30-59 days	.00	+
Past due 60-89 days	59.98	+
Past Due 90+ days	3,587.24	+

P	GP %	#Orders
1,467.86	94.77	3
0,559.38	51.88	28
128.98	41.74	2
81.95	19.86	5

Directory and Naming Conventions

As noted above, the document file must be placed in a specific place and be named according to a specific naming convention.

The directory structure will normally be

/artwork/docs/xx0000

where the "xx" is replaced by an abbreviation that identifies the type of entity:

po	Order
qt	Quote
cs	Customer
vn	Vendor

The "0000" is replaced by the first four digits of the order, customer, etc. So a document for order 123456 would go into the following directory

/artwork/docs/po1234

Why not just dump all the files in the "/artwork/docs" directory? If you put a large number of files in one subdirectory, it becomes slow and inefficient to access. By grouping the files into separate subdirectories for each 100 files, this puts fewer files in each subdirectory. In fact, if you anticipate using this feature extensively and save a large number of documents, you might consider making new subdirectories for every 10 orders. This can be done but it is a decision that should be made when you first start using this feature.

The subdirectories for orders and quotes will be created automatically when the order or quote is added to the system. The subdirectories for customer and vendor documents will be created automatically if you use the upload script described below. If you save the document directly, however, you will have to create the subdirectory yourself if it does not already exist.

The file itself is named in a specific way. It is structured as `xxYYYYYY_zzzzz` where

<code>xx</code>	Special abbreviation that identifies the type of entity such as "po" or "cs"
<code>YYYYYY</code>	Number associated with the entity such as order number 123456 or customer 654321
<code>zzzzz</code>	Unique file name for this document such as "VI121212"

So if you had a vendor's invoice numbered 121212 for order number 123456 that you had scanned into a PDF format, it would be named something like

`po123456_VI121212.pdf`

The full path of the document would then be

`/artwork/docs/po1234/po123456_VI121212.pdf`

The part of the file after the underscore character excluding the suffix (VI121212 in the example above) is the part that will be displayed in the document list. You should therefore make it meaningful enough to be identified later.

We suggest that you decide on a naming convention so that documents saved by various people are named in a similar way. For example, use "VI" followed by the vendor's invoice number for all vendor's invoices and "EM" followed by the date for e-mails. This is not required but it does help to group similar types of documents on the list that is displayed.

Saving the document file on the server

You may create the document file by scanning a paper document and saving it to a file. Or someone may send you a document as an attachment on an e-mail. If you are on the same network as the server, you can just save the file in the appropriate directory on the server.

The directory structure is described above. However, here are some screen shots to help you find the correct directory. Some of your displays may not be exactly the same if you are on a different version of Windows or use a different operating system. However, the process is the same.

The screen shots on the following pages give you step-by-step instructions.

1. Access the Lakeshore server.
2. Find the "artwork" directory and click on it.
3. Find the "docs" directory and click on it.
4. Find the correct subdirectory for the order, customer, etc. you are entering. So if you are saving a document for order 123456, you would pick subdirectory "po1234". If you are saving a document form customer 900000, you would pick subdirectory "cs9000". Click on this directory.

If you do not see this directory, you will need to create it first.

5. Save the file in the subdirectory.

Access the Lakeshore server

The screenshot shows a web-based file upload interface. On the left, a 'Choose file' dialog box is open, showing the 'screen_shots' directory. The file list includes: epsa_receive, epsa_send, quick_send_dialog, quick_send_setup, and schedule_calendar. A red arrow points from a text box to the 'My Computer' icon in the left sidebar of the dialog. The text box says: "Click on this icon or equivalent on your computer." Below the dialog, there are 'File name' and 'Files of type' fields, and 'Open' and 'Cancel' buttons. The main interface on the right has a 'Browse...' button, a search icon, and a red warning message: "File name should not contain embedded spaces or the characters '#', '&', '+' or '\$' or apostrophe (') or quotes (')". At the bottom are 'Upload', 'Reset', and 'Exit' buttons.

Find the Artwork directory

The screenshot shows the same web-based file upload interface, but the 'Choose file' dialog box is now open to 'Samba Server (Office2)'. The file list includes: artwork, catalogs, clients, INSTALL, kaye, lakenet, laketrans, manual, payroll, UPS, v10_clients, v81, vs9, web down, and windows_area. A red arrow points from a text box to the 'artwork' directory. The text box says: "Click on the 'artwork' directory". The rest of the interface, including the 'Browse...' button, search icon, red warning message, and 'Upload', 'Reset', and 'Exit' buttons, is identical to the previous screenshot.

Find the "docs" directory

Choose file

Look in: artwork on Samba Server (Office2)

Click on the "docs" directory

File name: Open Cancel

Files of type: All Files (*.*)

File name should not contain embedded spaces or the characters "#", "&", "+" or "\$" or apostrophe (') or quotes (")

Upload Reset Exit

xx" is a 2-digit character representation of the type of document, of the original file, adjusted to remove invalid characters.
al file of C:\...My Documents\W121212.pdf will be

Find the correct subdirectory

Choose file

Look in: docs

Click on this icon to create a new subdirectory if the one you need is not listed

Pick the appropriate directory for your order, quote, customer or vendor.

File name: Open Cancel

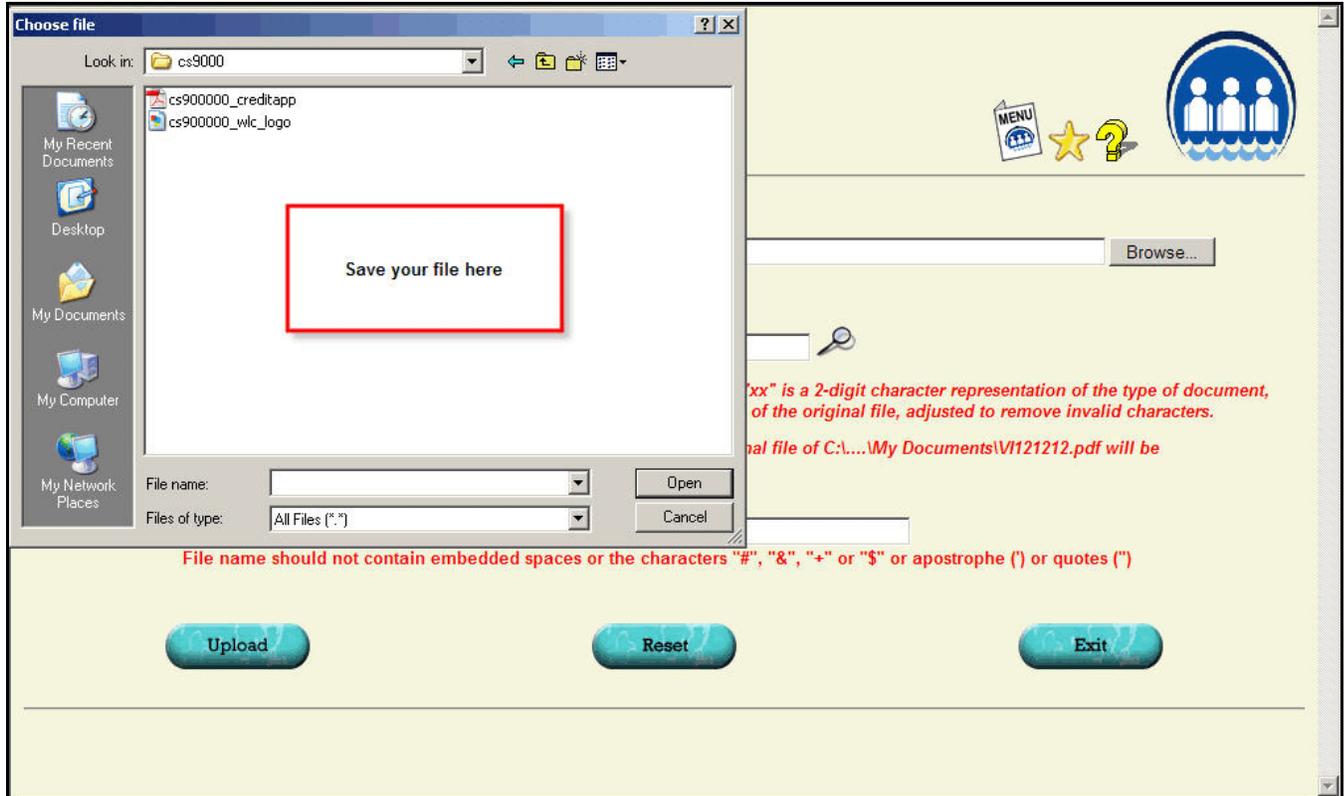
Files of type: All Files (*.*)

File name should not contain embedded spaces or the characters "#", "&", "+" or "\$" or apostrophe (') or quotes (")

Upload Reset Exit

xx" is a 2-digit character representation of the type of document, of the original file, adjusted to remove invalid characters.
al file of C:\...My Documents\W121212.pdf will be

Save the file



Uploading a document file to the server

If you are outside the office and not on the internal network, you usually cannot use the method described above to save the document file to the server. We have added to Version 11 an upload script that you can use to upload the document file to the Lakeshore server. It can be used from either inside or outside the office.

This upload script can be accessed from Order Processing, Art/Document functions, Upload document file as well as from Reference Information, Art, Upload document file. The two functions are identical. We just put it in two places on the menu so that you could use whichever one was most convenient.

There is an example of an upload request on the next page.

Upload Document File

File name of original document including full path:

Type document: Number of Order #, Customer #, etc.

NOTE: Document file name will be formatted as "xx123456_filename" where "xx" is a 2-digit character representation of the type of document, "123456" is the Number entered above and "filename" is the file name of the original file, adjusted to remove invalid characters.
For example, the new document file for order # 123456 from the original file of C:\...My Documents\VI121212.pdf will be po123456_VI121212.pdf

New file name:

File name should not contain embedded spaces or the characters "#", "&", "+" or "\$" or apostrophe (') or quotes (")

Here is some additional information about the fields shown:

- **File name** Enter the full file name including the path. The easiest way to do this is to click on the "Browse" button to the right of the file name. This gives you access to the standard file look up function on your computer such as you see on your "My Computer" icon. Locate your file and click on it. The full file name and path will be pulled into the screen.
- **New file name** Enter the new file name. This name will usually default to the file name of the file you are uploading. However, the Linux server does not like file names with embedded spaces or certain special characters such as "&". These will be replaced by the underline character or omitted. So note that an original file name of "credit app.pdf" on the sample screen would be converted to "credit_app.pdf". This will be done automatically.

You can change the file name if you like but you must still follow the rules of no embedded spaces and none of the special characters that cannot be used.

Once you click the "upload" button, the art file will be uploaded to the Lakeshore server and given its new name. If the subdirectory needs to be created, it will be. The file name will automatically have the correct prefix (for example "po123456_") included.

Capturing e-mails as documents

Many users copy the contents of e-mails about orders and past them into their order notes. This can make the order notes quite long. It is sometimes difficult to wade through all the notes to find the information you may be

seeking. Also, the information transferred from the information may contain some special characters that do not get saved properly.

Another approach would be to capture the e-mails as documents associated with the order.

The easiest way to capture the e-mail text is to use a PDF printer. This is a special printer utility that captures the content of the e-mail as a PDF instead of sending it to a physical printer. It can also be used from other documents such as word processors to create a PDF. In fact, it was the utility used to create the document you are reading.

To capture your document this way, you would ask to print your e-mail. Then, select the special PDF printer as the printer you want to use. Then, save the resulting PDF as a document as described above.

If you are interested in this approach, there is a free version you can download at

<http://www.pdfforge.org/products/pdfcreator>