

HOLIDAYS & OTHER EVENTS

It is sometimes convenient to record holidays and other events in Lakeshore. These are used in two ways.

- Calculations of ship dates are based on “working” days, normally Monday through Friday. By defining your holidays, you may also skip over holidays and any other non-shipping days.
- Notation on Lakeshore calendars in version 12.

We normally set up the basic holidays when we set up a new system so you may have some holidays defined. You may review those definitions as well as set up additional events by going to

Reference Information

Miscellaneous codes, group 2
Holidays and other events

You may set up as many as 99 events. Assign each event a number between 1 and 99. They do not need to be consecutive.

As part of defining the event, you have several ways to specify when and how often the event occurs:

- **Daily, including weekends** - rarely used
- **Daily, Monday through Friday** - rarely used
- **Weekly, specific day** - **Example:** weekly sales meeting every Monday
- **Monthly, specific day** - **Example:** payroll on 15th and 31st
- **Monthly, specific week and day** - **Example:** Kiwanis club on 1st Monday of month
- **Annual, specific day** - **Example:** Christmas Day
- **Annual, specific month, week, day** - **Example:** Thanksgiving on 4th Thursday of November
- **Specific range of dates** - **Example:** Someone’s vacation

When you create the event, you may check the “Holiday?” checkbox if the event is a holiday or other non-shipping day. You may also specify an expiration date when appropriate for all types other than the “specific range of dates” one. It has an expiration date by default.

On the next few pages you will see some sample screens for a variety of events.

On the final page, you will see how the event will be displayed on the new Lakeshore calendar. The event will be placed on everyone’s calendar.

An event like Christmas that is always on a specific date:

Holidays and Events MENU   V12

Event Number: 

Description:

Type of Event:

Month:

Day of Month: (Use '31' For 'Last Day of Month')

Holiday?

Expiration Date:  (Leave blank if no End Date)

An event like Thanksgiving that is on different dates but assigned according to a specific formula:

Holidays and Events MENU   V12

Event Number: 

Description:

Type of Event:

Month:

Week (1-5): (Use '5' For 'Last Week of Month')

Day of Week:

Holiday?

Expiration Date:  (Leave blank if no End Date)

If you decided that you did not want to ship on Fridays, here's how you would set that up. If it was only on Fridays during the summer, you could put an expiration date of 8/31/12 of the current year. You would have to update that date each year when you want to restart the "no shipping on Fridays" event.

Holidays and Events MENU V12

Event Number:

Description:

Type of Event:

Day of Week:

Holiday?

Expiration Date: (Leave blank if no End Date)

Here's how you would set up a specific, non-reoccurring event:

Holidays and Events MENU V12

Event Number:

Description:

Type of Event:

Holiday?

Begin Date:

Expiration Date: (Leave blank if no End Date)

Here's how the "election day" event entry would show on your Lakeshore calendar:

Lakeshore calendar MENU ☆ ? V12

ELECTION DAY

November, 2012						
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	

December, 2012						
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					

January, 2013						
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		

← Previous
Exit
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Show completed entries *Add new entry*

Delete?	Comp?	Time	Company/Contact	Overview	Contact Notes	Description	Order/Quote	Add'l Info	Schedule Follow up	Reschedule entry
No entries on file										