

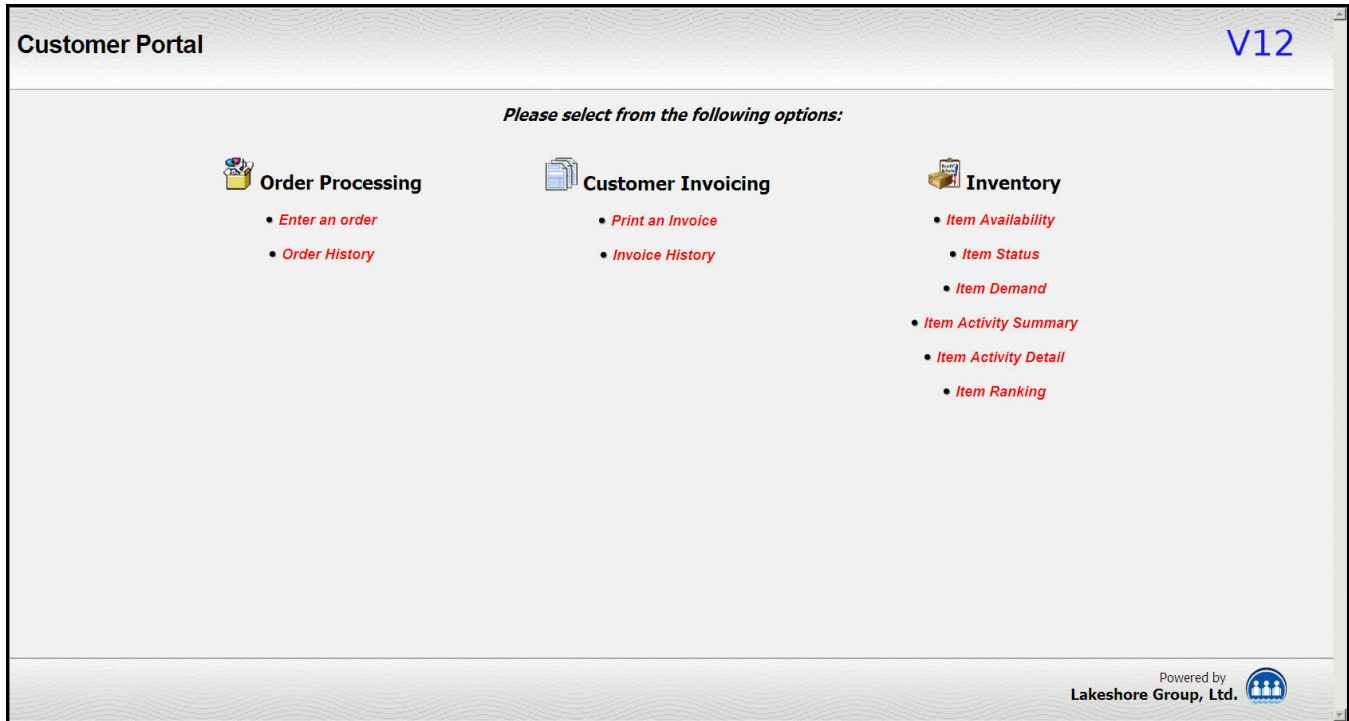
CUSTOMER PORTAL

The customer portal is a new option that lets you offer your customers a place where they can check on program merchandise, print a copy of an invoice, or even enter an order.

You control what functions each customer can see on their menu so it is easy to customize to your needs.

Because of security reasons, it is not currently available to our Lakeshore Online customers. You must have your own dedicated server to use it.

Below is a screen shot of a menu with all the functions currently available. If you would like to have additional functions added, please contact Lakeshore technical support.



There are two steps to setting up the customer portal for your customer.

- 1) There is a detailed set up for each major program you want to set up. That program may use several customer numbers in Lakeshore and have several logins accessing the site. For that reason, we ask that you assign a **program number** to each variation in sites you want to set up. If you are not already using program numbers, they are set up under Reference Information, Miscellaneous codes, group 1, Program numbers.
- 2) Each person accessing the site must have his or her own login and password. You may use an e-mail address as the login or just a name. That is your choice. We also suggest you use a secure password.

Because the set up can be complex, we suggest you contact Lakeshore support to help you set up the first site.

However, screen shots of the program and the login are included on the next 2 pages so that you can get a feel for how the set up is done.

Detailed Program Set up

Program Number: Widgets Galore
Logo:
Company/Side:

Order entry screen

Ask Customer #: Label as:

Ask Billing address?
Ask Shipping address?

Ask for Customer's PO #? Label as:
Ask for Job ID? Label as:
Ask for "In Hand" Date? Label as:
Ask for Ship Date? Label as:
Ask for Ship Via? (if unchecked, ship via code on customer file will be used)

Valid Shipping Methods

1: <input type="text" value="01"/>	2: <input type="text" value="31"/>	3: <input type="text"/>	4: <input type="text"/>	5: <input type="text"/>
6: <input type="text"/>	7: <input type="text"/>	8: <input type="text"/>	9: <input type="text"/>	10: <input type="text"/>
11: <input type="text"/>	12: <input type="text"/>	13: <input type="text"/>	14: <input type="text"/>	15: <input type="text"/>
16: <input type="text"/>	17: <input type="text"/>	18: <input type="text"/>	19: <input type="text"/>	20: <input type="text"/>

Ask for Billing Method? (if unchecked, credit terms on customer file will be used)

Valid Billing Methods

1: <input type="text" value="01"/> C/C? <input type="checkbox"/>	2: <input type="text" value="11"/> C/C? <input checked="" type="checkbox"/>	3: <input type="text"/> C/C? <input type="checkbox"/>	4: <input type="text"/> C/C? <input type="checkbox"/>	5: <input type="text"/> C/C? <input type="checkbox"/>
6: <input type="text"/> C/C? <input type="checkbox"/>	7: <input type="text"/> C/C? <input type="checkbox"/>	8: <input type="text"/> C/C? <input type="checkbox"/>	9: <input type="text"/> C/C? <input type="checkbox"/>	10: <input type="text"/> C/C? <input type="checkbox"/>

Line Items

Presentation of items: List ALL items in program & let user enter quantity ordered of each (not recommended if there are many items)
 Request item numbers Number items allowed: Any item have color as separate code? Separate size code?

Show pricing information? Show availability? Show photo of item?

Ask for Comments? Label as:
Ask for Imprint? Label as:
Ask for Special Instructions? Label as:

Defaults on order

Sales Report Categories: 1: 2: 3: 4:

Reports

Item availability Name:
 Show selling price?

Item status Name:
 Put color in separate column?
 Put size in separate column?
 Put tagged in separate column? (if unchecked, tagged will be included with allocated)
 Display minimum/reorder quantity?
 Show value of inventory?

Item demand Name:
Format: 1 row w/rolling number of months Multiple rows---1 row/year (no drop ship)
Number of months (rolling time period) or years (multi-year):
 Include drop ship?
 Show current quantity on hand?
 Show value shipped?

Item Activity Summary Name:
Item Activity Detail Name:
For the Activity Summary & Detail:
Formula to determine start date: Cover specific number of months Always start with a specific month Leave beginning date blank
Number of months (specific time period) or specific starting month:
 Put color in separate column? (used for summary & Excel versions only)
 Put size in separate column? (used for summary & Excel versions only)
 Show sell price of quantity shipped?
 Show cost of quantity shipped?

Item Ranking Name:
 Show gross profit?

Basis of inventory value

Set up Customer Portal User

Login:
 Name:
 E-mail address:
 Password:
 Company:

Restrictions to what data can be accessed

Restrict to this e-mail address?
 Restrict to specific programs?

001		Widgets Galore

Restrict to specific customer number(s)?

100000		ATTENTION!

Restrict to specific inventory types? (item-related screens)

Position:	1st Position	Type:	001		WIDGETS
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			
Position:	-- Choose Position --	Type:			

Options to be available for this user: [Check all options](#) [Uncheck all options](#)

- Orders**
- Enter an order
- Order history
- Customer Invoices**
- Customer invoice copy
- Invoice history
- Inventory**
- Item availability
- Item status
- Item history
- Item activity summary
- Item activity detail
- Item ranking