E-mail Note with Link to Order/Quote notes

One of the most popular of the new enhancements in Version 12 is a new function that lets you send an e-mail to someone concerning an order.   The text of the e-mail as well as the recipients' email addresses are captured in the order notes.   This function is also available for quotes.

You can access this function from the menu but it is also accessible most places where you see the order notes icon.   In addition to the icon for the regular notes, you will also see an icon for this function ( ).

You can send the e-mail to up to 5 addresses.   There is a drop down list of all staff e-mails to the right if you want to direct the e-mail to one of those.   There will be links for any of the following that are appropriate for the type of order (vendor if there's a vendor on the order, etc.)

> Vendor
> Decorator
> Customer
> Salesman
> Sales Assistant

In addition to the left/right/center justification, standard comments, and spell check options that you are used to for text areas, you can also make the note bigger, in bold, in italics, and underlined if you wish.   If you want a specific phrase formatted, highlight the phrase, then click on the feature to the right of the text area.   If you don't highlight any text before clicking on the formatting phrase, the full text will be formatted.

If you want to color code the note, you can pick a color from the drop down list to the right of the note text.   This is optional.

You can add art or other attachments that are stored on the Lakeshore server to the e-mail or you can pick one from your personal computer.

The message sent in the sample below is shown in the order note example on the next page so you can see how it will be captured in the notes.

E-Mail Note w/Link to Order Notes   V12

Order Number:	711388		
Send to E-mail address:	kkeady@lakeshoregroup.com	Kaye Keady	*Customer Salesman Sales Assistant*
CC:	mycst@mycstco.com	-- Select staff e-mail --	*Customer Salesman Sales Assistant*
		-- Select staff e-mail --	*Customer Salesman Sales Assistant*
		-- Select staff e-mail --	*Customer Salesman Sales Assistant*
		-- Select staff e-mail --	*Customer Salesman Sales Assistant*
'From' E-mail address:	kkeady@lakeshoregroup.com		
Subject:	Art approval for your order		

Your message:

I wanted to see if you had had a chance to review the art proof we sent you for your order for jackets.   Please let me know if the art is OK or not as we cannot place the order until you approve the art.

I've attached another copy of the art in case my original e-mail isn't handy.

Note Color: Kaye's color

Highlight text to be emphasized, then click on link below.

If nothing is highlighted, full text of message will be emphasized.

Bold

Underline

Italics

Bigger

Attachments:

Files physically stored on the server:
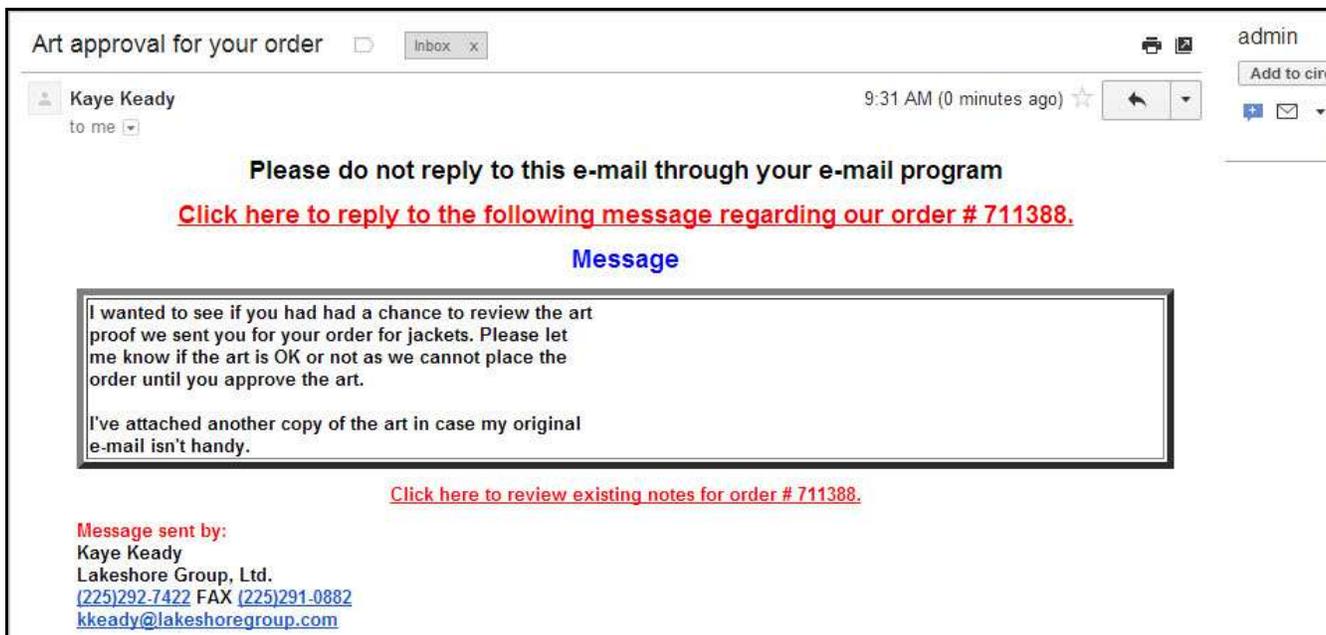
1: Aussie.jpg

2:

3:

File stored on your computer: Browse...
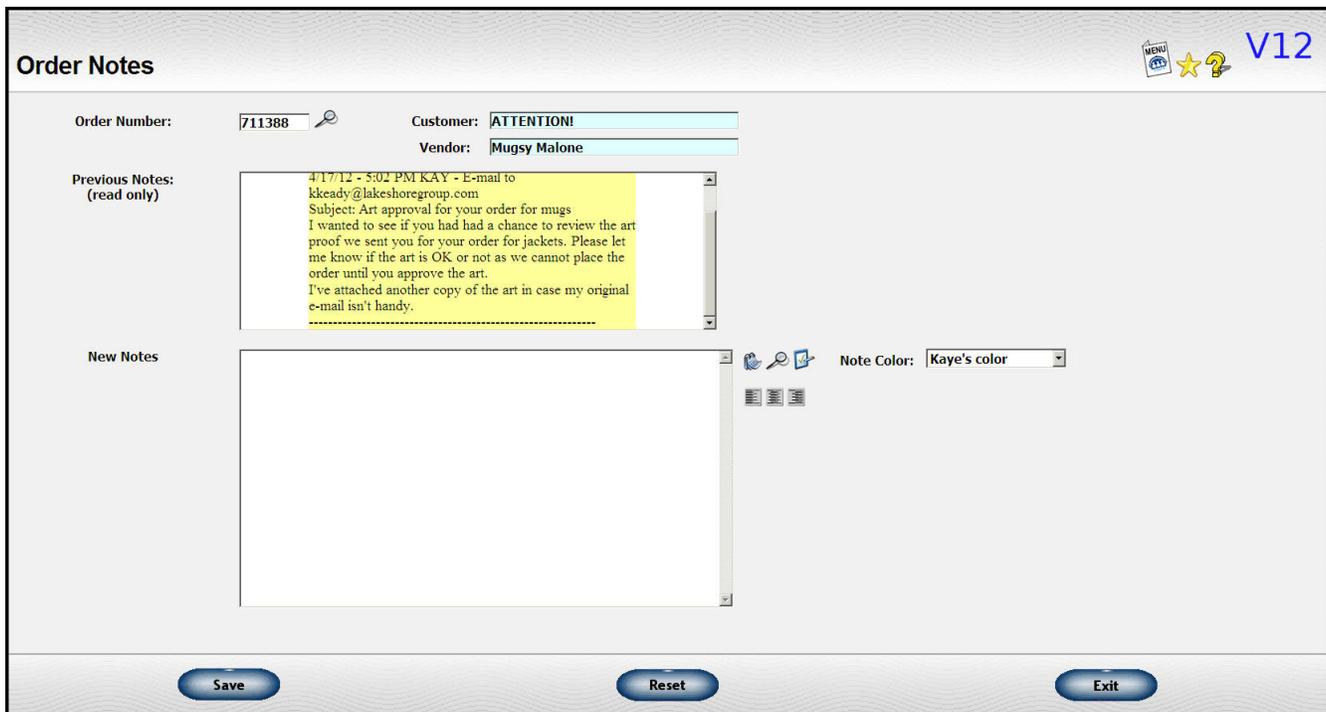
Here is a sample of what the recipient of the e-mail will receive.

The format of the e-mail message is a "template" that can be adjusted like we adjust the templates for forms. Contact Lakeshore Technical support if you would like to make a change.

There are two links included on the e-mail:

1) **A link to let you review existing order notes.** Only recipients with the same domain name as yours will have the link to the notes included in the body of the e-mail.. The domain name is the part after the "@" symbol so for "kkeady@lakeshoregroup.com", the domain name is "lakeshoregroup.com".

If you are using "gmail" or some commonly used e-mail server, you may want to consider getting your own domain name if you are planning on using this function.

2) **A link to reply to the e-mail.** The text of the reply will also be captured in the order notes. The reply will be formatted just as the original one including the link for the reply so you can do a "round robin" e-mail conversation with someone and have all the text captured in the order notes.

On the "reply" screen, the default "reply to" address will be to the person sending the e-mail. You may change it and add others.

If the person replying to the e-mail is outside your domain, only staff and salesman links are shown for the e-mail address selection.

Reply to E-mail

Order Number:	711388
Reply to:	kkeady@lakeshoregroup.com
CC:	

Kaye Keady — *Vendor Customer Salesman Sales Assistant*
-- Select staff e-mail -- *Vendor Customer Salesman Sales Assistant*
-- Select staff e-mail -- *Vendor Customer Salesman Sales Assistant*
-- Select staff e-mail -- *Vendor Customer Salesman Sales Assistant*
-- Select staff e-mail -- *Vendor Customer Salesman Sales Assistant*

Subject line for your e-mail: Art approval for your order for mugs

Your message:

Note Color: Link note

**Highlight text to be emphasized, then click on link below.
If no text is highlighted, the full text will be emphasized.**

Bold

Underline

Italics

Bigger

File name of document you want to upload (optional):   [Browse...]

We accept the following file types: ai, eps, doc, jpg, pdf, png, txt, and xls

Submit   Exit

The reply will also be captured in the order notes with the date, time, and e-mail addresses just like the original message.