

Lodge-ical News – October 2005

User Tip: The difference between AND and OR

The Mailing Labels form (Clients menu/Mailing Labels) allows you to “slice and dice” your client database to create custom queries for specialized mailings and emails. You can select as many selections to make your query as specific as possible.

Example 1: Select State = WA, Referral Source = INTERNET, and Inquiry Type = COUPLE. This query will generate “all clients who live in the state of Washington, heard about you from the Internet, AND who are a couple”. All 3 criteria MUST be true in order to satisfy the criteria (using AND).

Example 2: Press the INTERESTS button and select 2 interests (i.e. Fishing and Hunting). This query will generate “all clients who have an interest in either Fishing OR Hunting”.

Example 3: Select State = WA, then press the INTERESTS button and select 2 interests (i.e. Fishing and Hunting). This query will generate “all clients who have an interest in either Fishing OR Hunting AND live in Washington”. So any client who lives in Washington and has an interest in Fishing and any client who lives in Washington and has an interest in Hunting will display.

Lodge-ical Version 7.0

Upcoming Feature: Select a mailing address

Lodge-ical version 7.0 will allow you to designate which address will be used as the mailing address. You can select “P” for Primary address or “S” for Second address. This feature will determine which address to use on the Mailing Labels form when requesting mailing labels, envelopes, and extracts.

Upcoming Feature: Differentiate between an email list and a mailing list

The Email/Mail OK button will be renamed to Email OK. This will now allow you to have a client who wants to receive emails but not regular mails (or the other way around).

You will be able to suppress a client from receiving mail if you select “N” (for neither) at the new Mailing Address field (as defined above).