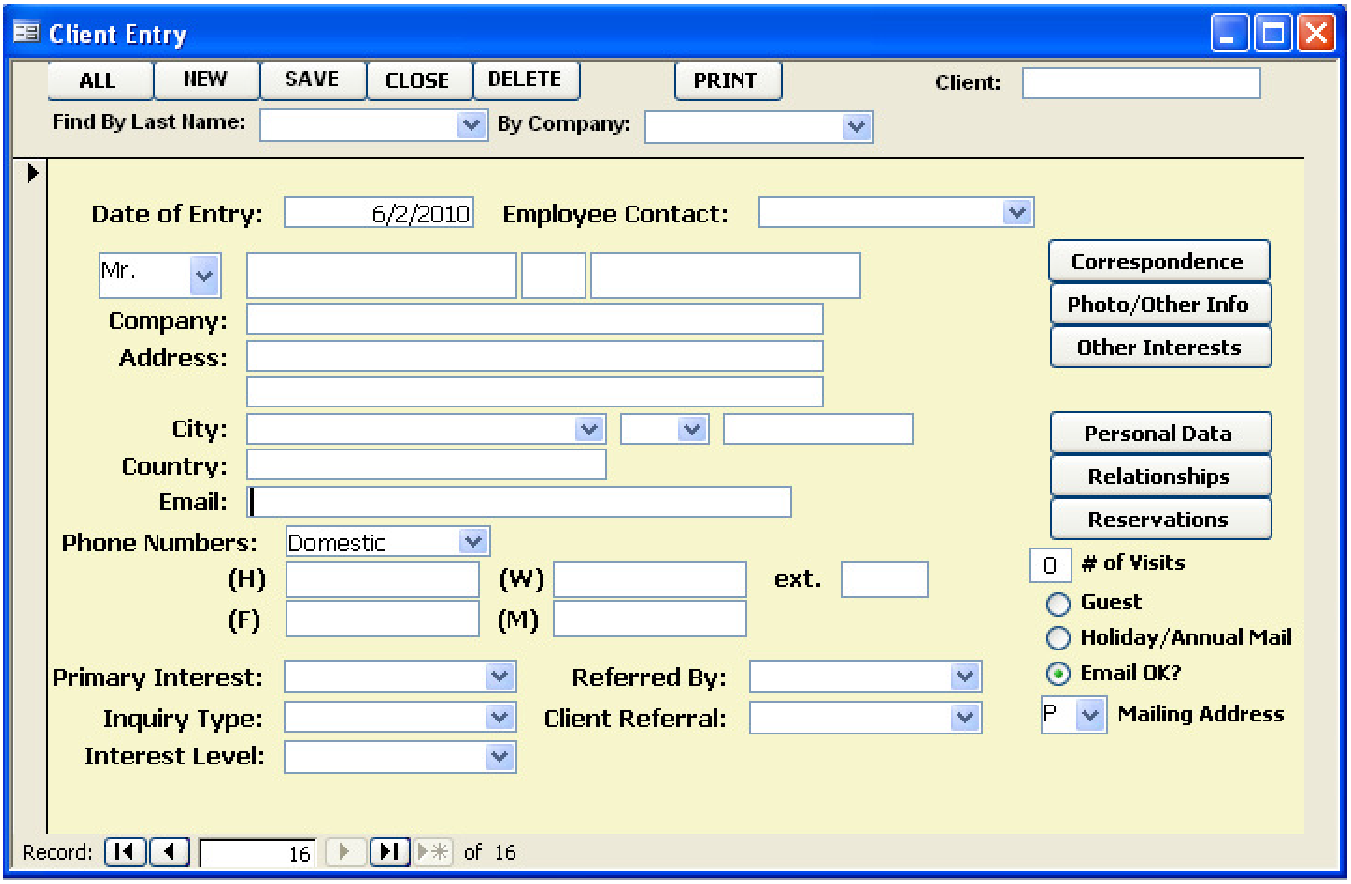
Client Entry

The definition of a client is any individual who makes an inquiry and/or books a reservation. You can also use the Client Entry form to enter your business contacts so that all important individuals are contained within the Lodge-ical™ database.

The data entry form is illustrated below and further defined:



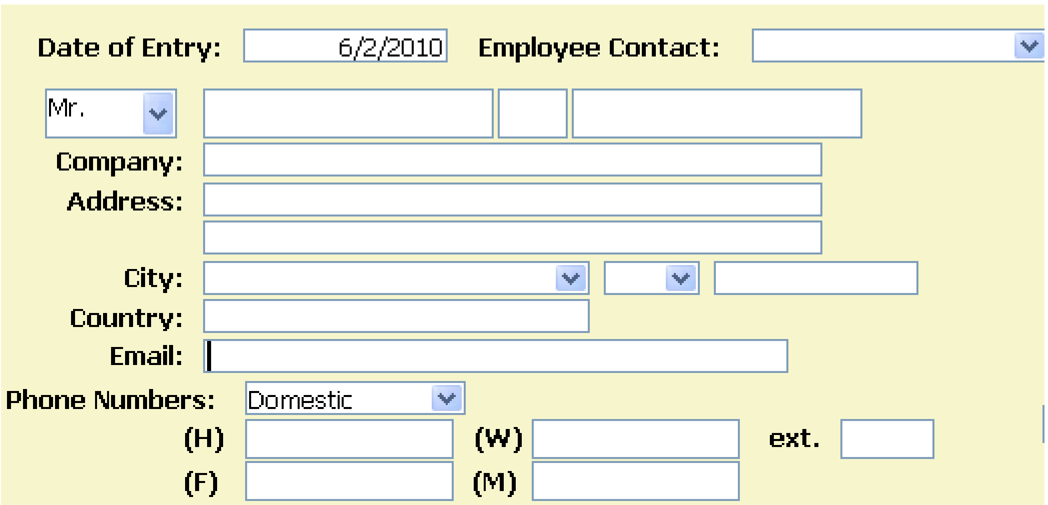
RECOMMENDATION: The time invested to complete this data entry form in its entirety will pay off many times over in the future. If you receive partial information via an email, we recommend that you make a follow-up phone call or email to collect all of the information.

RECOMMENDATION: If your website contains a "Request for Information" form, design the form to match the fields on the Client Entry form.

The Basics

At a minimum, an individual's name and address should be entered. Press the NEW button to add a new client.

RECOMMENDATION: Before entering a new client, use the Find By Last Name or Find by Company dropdown to make sure the client does not already exist.



Date of Entry – the date the client was entered into Lodge-ical™
Employee Contact – select the person who handled the initial inquiry from a list of active employees. You can maintain the list of employees via the Employees form (via the Employees menu).
Salutation – select the salutation for the client keeping in mind that you might use Mr. and Mrs. for married couples. You can maintain the list of salutation via the Salutations menu pick (Maintenance menu). You can also select one salutation as the system default via the Business Information menu pick (Maintenance menu).
First Name – the first name of the client
Middle Initial – the middle initial of the client (you can include a period if appropriate, i.e. "J.")
Last Name – the last name of the client

USER TIP: The first character of the first name, middle initial and last name will be automatically capitalized.

ATTENTION: After you enter the client name, Lodge-ical™ does a search on the database to see if the client name already exists. If so, a message will appear "Client with same first and last name has already been entered. Do you want to continue?" Press the YES button to continue. If you press the NO button, Lodge-ical will undo your data entry, and point you to the Find by Last Name dropdown so that you can search the database for the matching client name.

Company – company name
Address 1 – the first line of the address
Address 2 – the second line of the address
City – the client's city. You can leave this field blank if you use the automatic zip code lookup feature.
State – select the state or province code from the dropdown. You can maintain the list of state and province codes via the Maintenance menu (States menu pick). You can leave this field blank if you use the automatic zip code look features.

Zip Code/**Postal Code** – the client's zip code or postal code (up to 9 digits).

USER TIP: A United States domestic zip code database exists within Lodge-ical™. Enter a zip code and the city and state will automatically appear. In some cases there is more than one city that is relevant (a primary and secondary city). In this case, you can use the dropdown arrow on the City field to select the secondary city.

ATTENTION: The zip code finder will only retrieve a city and state if both the city and state fields are left blank.

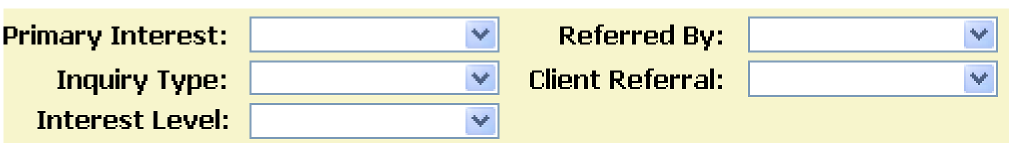
Country – the client's country (usually entered if different than YOUR country)
Email – the client's email address

USER TIP: If you are using Microsoft Outlook® as your email program, double-click on the email address and you will be sent directly to a new mail message where the client's email address is listed on the "To" line.

Phone Number Designation – select Domestic if you want the input format to be (999)999-9999 or International if the phone number does not require an input format.
H, W, extn, F, M - Home phone number, Work phone number, Work extension, Fax phone number and Alternate phone number

Qualifying your Clients

Complete the fields below to further define the individual client. Populating these fields is extremely important as selections entered will group this client with other clients who have the same characteristics. This becomes invaluable as you use Lodge-ical™ as a marketing tool.



Primary Interest – defined as the client's main interest when making his/her first inquiry. Select the client's primary interest (defined as from a list of active primary interest types.
Inquiry Type – defined as the type of booking. Select the inquiry type from a list of active inquiry types.
Interest Level – select the level of interest from a list of active interest levels.

RECOMMENDATION: At times, the Interest Level selection is subjective. Use your skills as you listen to a person's voice over the phone or read an email to determine their level of interest.

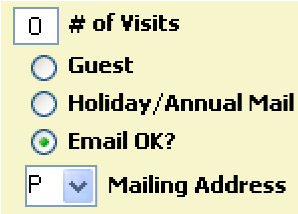
Referred By – select the referral source (i.e. advertising source) from a list of active referral sources.

USER TIP: The selections in these fields can be added/modified via the Maintenance menu.

Client Referral – there are times when a client is referred to you by another client. Select a client name from the Client Referral dropdown list. Only clients that are already entered into Lodge-ical™ can be selected.

USER TIP: Go to Reporting/Income Reports/Income by Client Referral to analyze the results of this field.

Other Information



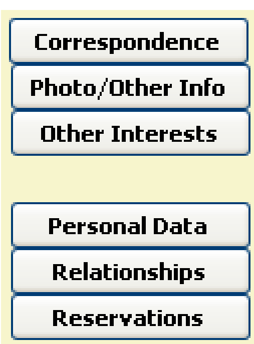
# of Visits – This field will automatically calculate the number of reservations that have been entered into Lodge-ical™ less than or equal to "today".

> **ATTENTION**: This field cannot be manipulated by a user. If you do not have all reservations since inception entered into Lodge-ical™, this number may not be accurate.

Guest – this option defaults to "no" until a reservation has been entered (linking guests to a reservation will also activate this option). You are allowed to manually activate/inactivate this option.
Holiday/Annual Mail – if the system default (Maintenance/Business Information) is turned on, this option defaults to "no" until a reservation has been entered. You are allowed to manually activate/inactivate this option.
Email OK – this option will be activated every time you enter a new client. If a client wishes to be excluded from any blast emails (via the Find-A-Client form on the Clients menu), you can manually inactivate this option.
Mailing Address – this dropdown lets you decide which address to use for mailing labels. Select "P" for Primary address, "S" for secondary address, or "N" for no mail. If you select "N", this client will be excluded from all Mailing Labels when doing queries via the Find-A-Client form (Clients menu).

Command Buttons

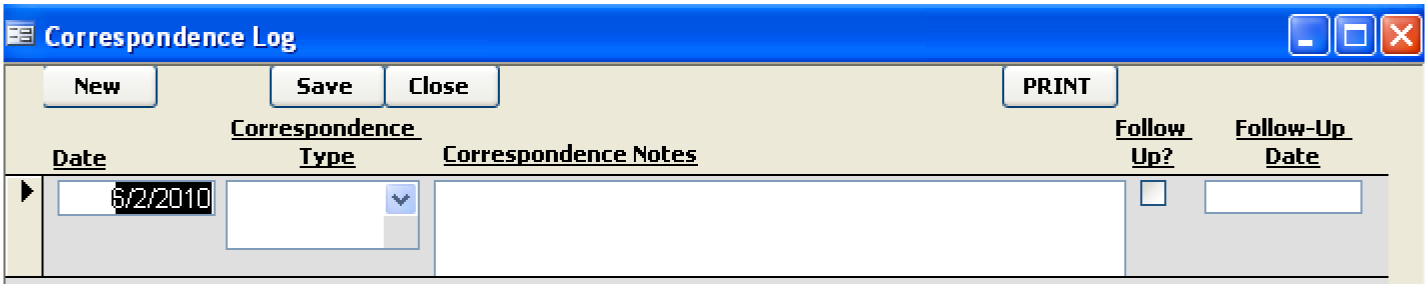
On the right hand side of the Client Entry form, you will see a list of command buttons. Each button offers even more information to record for a particular client. Once data has been entered into a particular area, the command button will become green. This will make it easier for you to determine what type of information has already been entered.



Each command button is further described.

Correspondence Log

Press the Correspondence command button to enter any correspondence between you and the client.



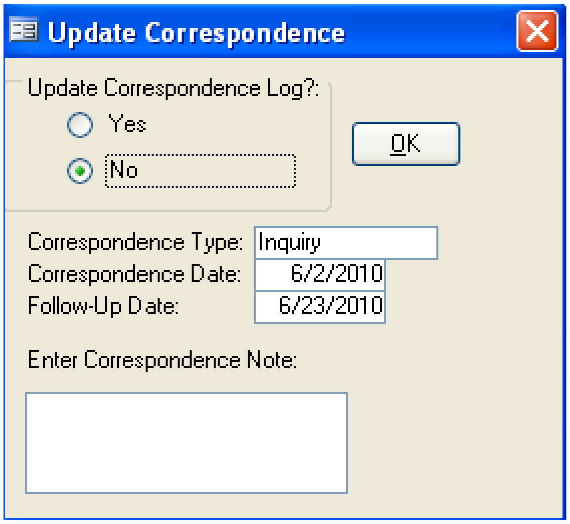
Date – Enter the data of correspondence
Correspondence Type – select a correspondence type from the dropdown list.
Correspondence Notes – enter any additional notes here. This field is a memo field and can accept up to 65,356 characters.

RECOMMENDATION: Use the Correspondence log to capture the contents of important email content. This will avoid you having to make the effort to sift through prior emails to remember important details. Use your shortcut keys, Ctrl C (copy), Ctrl V (paste).

Follow-Up – this checkbox can either be automatically or manually set.
Follow-Up Date – this field can either be automatically or manually set.

USER TIP: To automatically set a ow-up reminder, go to Maintenance/Correspondence Types to enter a default “days to follow-up”.

In addition to entering information manually into the Correspondence Log, there is functionality built into Lodge-ical™ to automatically enter information into the Correspondence log. Throughout Lodge-ical™, you will see this form:

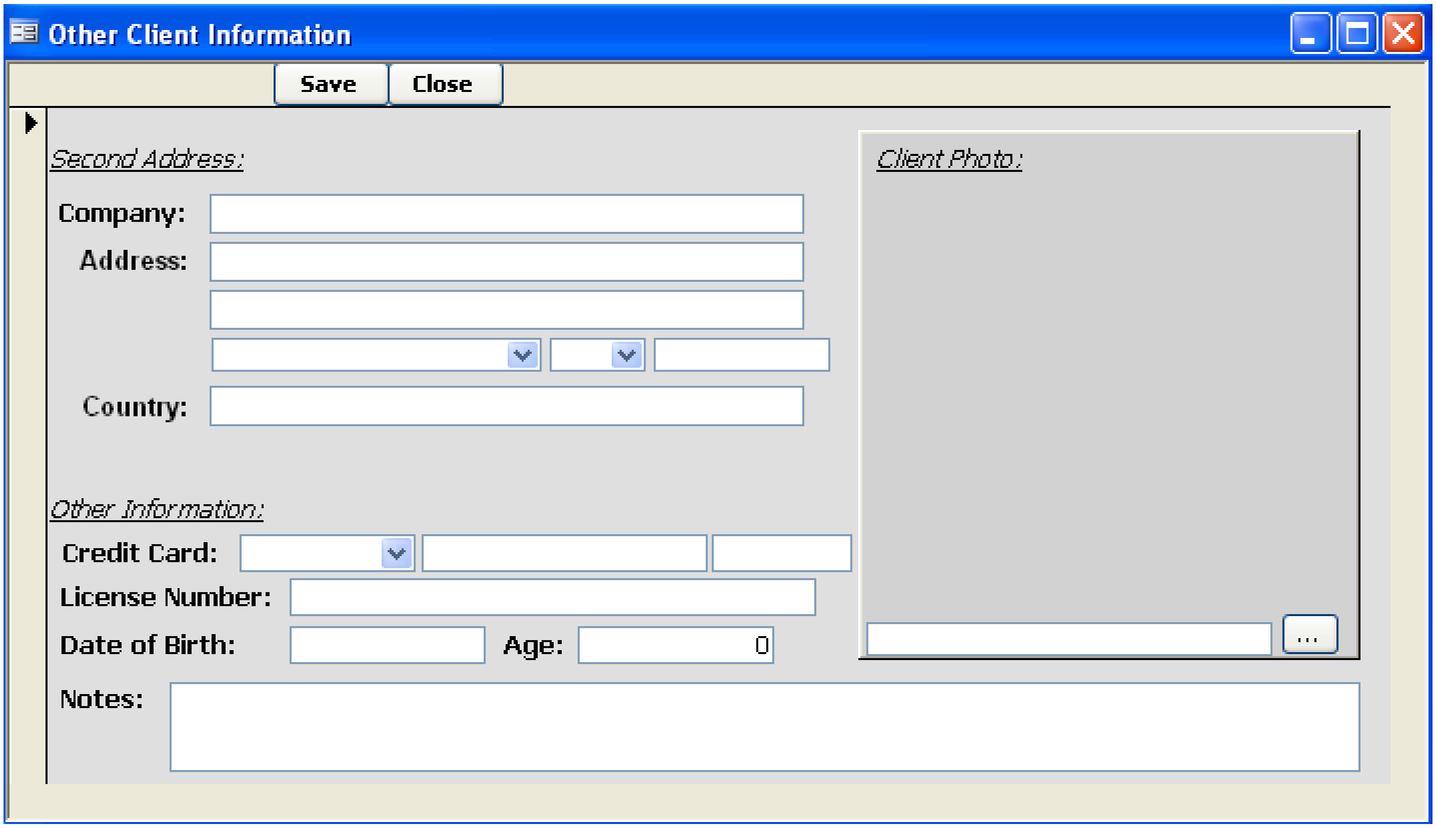


If you select Yes, and press OK, Lodge-ical will record the correspondence type, date, follow-up date, and notes into the appropriate fields of the Correspondence Log.

USER TIP: Set the yes/no default for this form via Maintenance/Business Information/System Defaults.

Photo/Other Information

Press the Photo/Other Info command button to enter additional information:



Second Address – enter a second address for information or billing purposes. If you want the second address to appear on correspondence then set the Mailing Address dropdown to "S" on page 1 of the Client Entry form.
Credit Card – enter the credit card type, 9 digit number and expiration date here.

USER TIP: Any credit card information stored here will automatically be retrieved when you enter a guest payment as long as the credit card types match.

License Number – this generally is either a fishing or hunting license number.
Date of Birth/Age – enter a date of birth and Lodge-ical™ will automatically calculate an age.

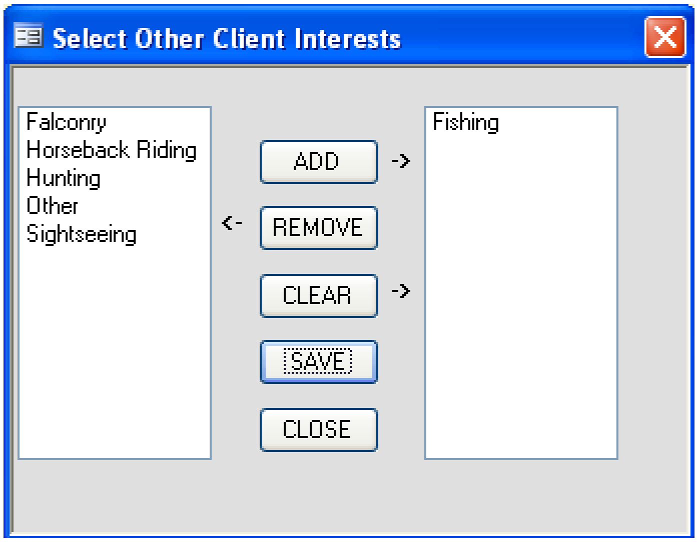
RECOMMENDATION: If you enter the date of birth, Lodge-ical™ will update the age field each year automatically.

Notes – enter any general notes here.
Client Photo – attach a client photo here by pressing the … button. Point to the location of a .jpg file that is saved on your computer, and double-click. The photograph is subsequently displayed.

ATTENTION: Lodge-ical™ does not store the entire photograph in the database. It only stores the location. Create one folder on your computer (shared folder on your network) so that all photographs are stored in one place. If you ever decide to move the folder location, Lodge-ical™ is not smart enough to change the location entered into this field.

Other Interests

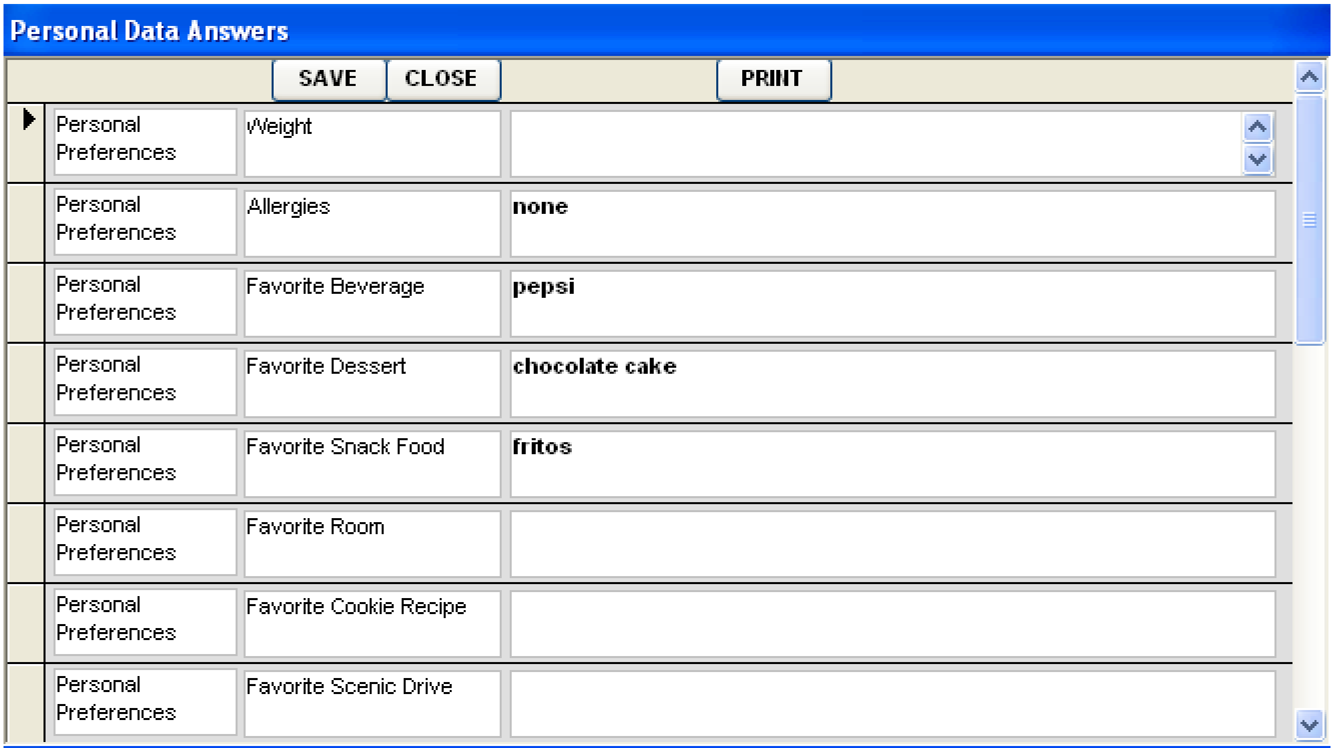
The Primary Interest on Page 1 of the Client Entry form shows you the interest that originally attracted the client to your operation. However, once you get to know the client, you will soon learn that he/she has additional interests. Use this feature to track the other interests.



The left hand side will show you a list of all available interests. The right hand side will show you all interests that pertain to the particular client. Click an interest on the left hand side and press ADD to add the interest to the list on the right hand side. Press SAVE, then CLOSE. You can update this list via the Client Interests form (Maintenance menu).

Personal Data

Press this button to view/edit all personal data information that has already been entered via a reservation.

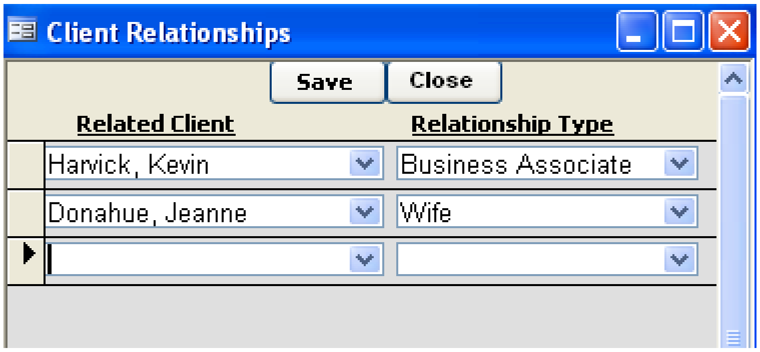


USER TIP: When you receive the Personal Data module, there will be nothing on the left hand side of the form. You will need to set up the categories of information that you want to start to collect from your clients. Set up is done via the Maintenance menu.

ATTENTION: You may press the PERSONAL DATA button and see a blank form. To initiate a Personal data profile, you must begin at the Reservation Entry form. Once personal data is entered into a reservation, it will become available via the Client Entry form (as shown above).

Relationships

Press this button to connect one or more clients together. Examples include family members, business associates, travelling companions, etc.

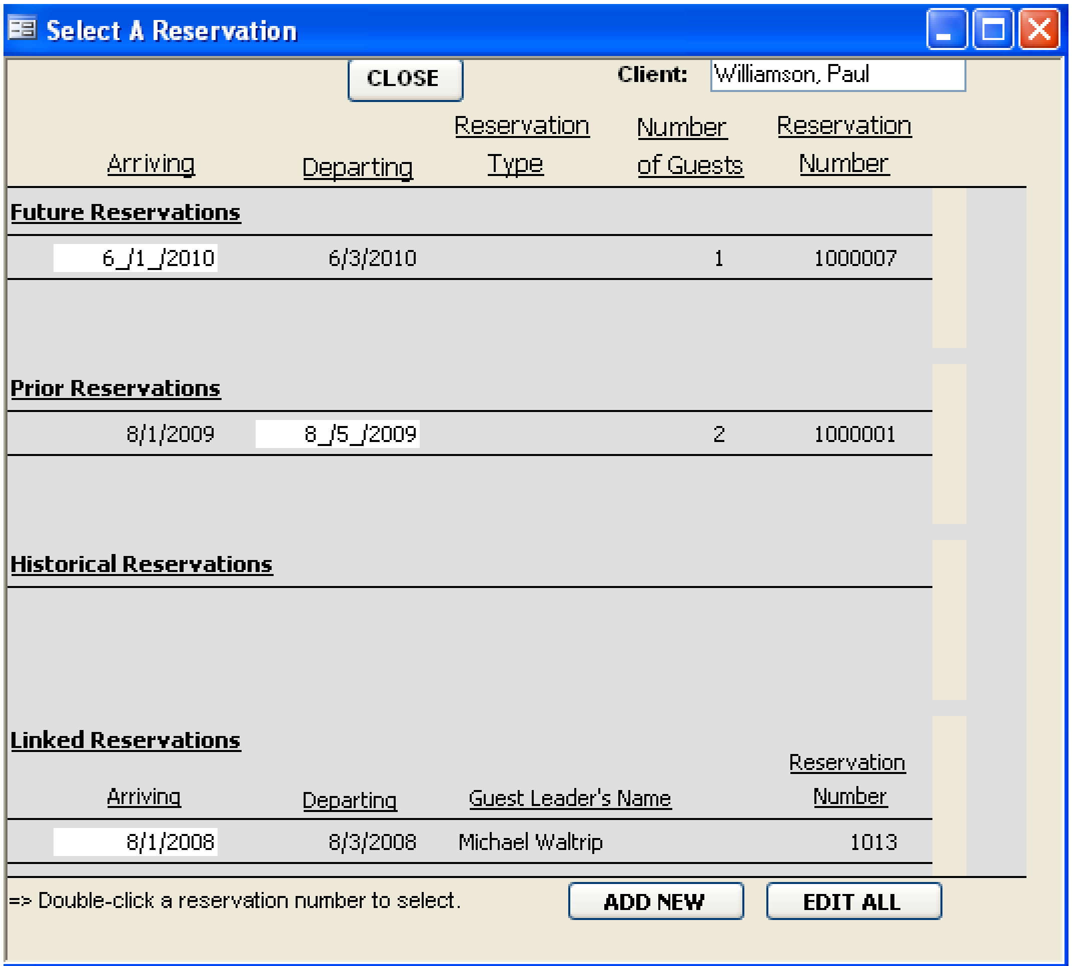


Select a client from the dropdown list. Only those clients entered into Lodge-ical can be selected. Select a relationship from the dropdown list.

In addition to entering information manually into the Relationship form, there is functionality built into Lodge-ical™ to automatically add a relationship when entering a Sub Client (further definition can be found within the Sub Client documentation.

Reservations

Press this button to add a new reservation or navigate to an existing reservation.



This form shows you all reservations entered into Lodge-ical™ associated with the particular the client.

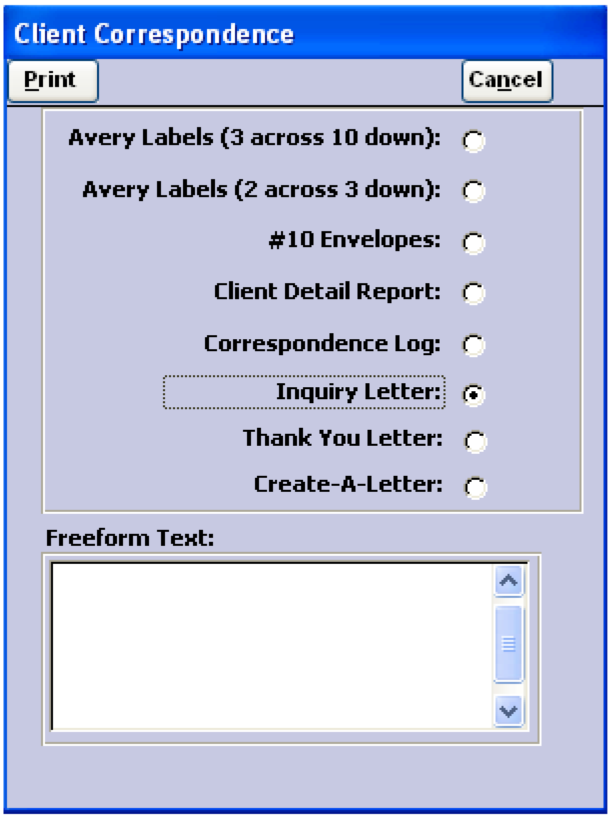
Section 1 shows all reservations with a future arrival date (i.e. an arrival date greater than or equal to today).
Section 2 shows all reservations with a previous arrival date (i.e. an arrival date less than today).
Section 3 shows all reservations that have been moved to history.
Section 4 shows all reservations for a client who is associated with a reservation as a linked guest (i.e. a member of a group reservation).

To edit any reservation, double-click on the reservation number and the reservation entry form will open. To add a new reservation, press the ADD NEW button. Press the EDIT ALL button so that you can easily scroll through their entire reservation history.

Client Entry Form navigation bar

At the top of the Client Entry form, you will see a navigation bar:

NEW – to begin a new client, click NEW
SAVE – upon completion of data entry, click SAVE
DELETE – to permanently delete a client, click DELETE. Lodge-ical will not remove the client from the database if a reservation exists. You can also remove a client from the client database by either inactivating the client or changing the client's status. More definition on these options is included in this documentation.
PRINT – this button provides the following menu:



Avery Labels (3 across 10 down) – this option will print one address label for the current client
Avery Labels (2 across 3 down) – this option will print one address label for the current client

> **USER TIP**: When you print a label, you will be asked to provide the number of the last used label. For example, if you are print a 3 across 10 down label and you have already used the first 4 labels, enter 4 into the field Partial Page Used Label so that Lodge-ical™ will print the next label in the fifth position.

#10 Envelopes – this option will print the client name and address on a business sized envelope.

> **USER TIP**: You can set a default to print your company return address on the envelope via Maintenance/Business Information/System Defaults.

Client Detail Report – this report will show you all information entered on Page 1 of the Client Entry form, the client's other interests, and their complete correspondence log.
Correspondence Log – this report will show you the entire correspondence log.
Inquiry Letter – this letter is designed to print onto your formal letterhead and included in an envelope with your company brochure. The paragraphs of this letter are stored via Maintenance/Custom Paragraphs. You can insert one paragraph of freeform text into the letter at a predetermined location.
Thank You Letter – this letter is designed to print onto your formal letterhead and to be sent to a guest after their departure. The paragraphs of this letter are stored via Maintenance/Custom Paragraphs. You can insert one paragraph of freeform text into the letter at a predetermined location.
Create-A-Letter – this letter is designed to print onto your formal letterhead. The paragraphs of this letter are stored via Maintenance/Custom Paragraphs. You can insert one paragraph of freeform text into the letter at a predetermined location.