

## General Information

The following section describes the features of Lodge-ical™ that you will find throughout the application.

**Main Menu Bar** – The main menu bar at the top of the window will guide you from one section to another. Depending upon the version of Lodge-ical that you are using, your main menu bar will look something like this:

A horizontal menu bar with a light blue background. It contains the following items: File, Clients, Reservations, Employees, Calendars, Reporting, Maintenance, Utilities, and About. Each item is separated by a vertical line.

### Understanding Data Entry Forms

There are two type of data entry forms used throughout Lodge-ical™. The first type of form will show you one record at a time, such as the Client Entry form or the Reservation Entry form. The second type of form shows you multiple records using a grid-like display. Examples include the correspondence log and the majority of forms that are found within the Maintenance menu.

Forms typically have a top row of buttons offering navigational direction like the illustration below:



Each action button is defined below:


**ALL** – press this button so that you can use the record selector at the bottom of the form to scroll through each record

**NEW** – press this button to add a new record

**SAVE** - Once data entry is complete, press the SAVE button. If you accidentally leave a data entry form without pressing the SAVE button, the record will, in most cases be saved automatically. However, pressing the SAVE button on the Reservation Entry form will calculate taxes and fees, a required deposit, and schedule any activities.

**DELETE** – A few of the data entry forms will have a DELETE button on the top row. Press the button and you will be asked to confirm the action.

**FIND** - To find a particular record, press the FIND button. The Find command displays a generic search feature allowing you to look for a whole word, a partial word, in one field or in all. Further instruction on how to se the Find feature is explained below.

**CLOSE** – Press this button to close the form. Using the “X” button in the upper right hand corner of the form () will also close the form.

**Data Entry Mode** - A pencil in the left hand margin indicates the record has not yet been saved (see Figure A). An arrowhead in the left hand margin of record indicates the record has been saved (see Figure B).

Figure A.



Figure B.



**Undo your actions** – if you are in a record that has not been saved to the database, you can use press the ESC (escape) key once to undo your field entry and twice to undo the entire record to prevent the record from being saved to the database. Your ESC key is located in the upper left hand corner of your keyboard.

**Delete a record** –The most common way to delete a record is to simply “click” your mouse in the left hand margin and press the delete key on your keyboard. You will be prompted with a warning message making sure you want to delete the record.

**USER TIP:** The only way to delete a reservation is to cancel the reservation via Reservations/Cancel Reservation.

**Entering a date** - all date fields will ask for a two digit month, a two digit day, and a four digit year. It is fastest if you use your numeric keypad and enter the format mmddyyyy. Most date fields default to the current date so date entry is minimized.

**Entering a time** – all time fields can be selected using a dropdown list of times. All times are either on the hour or half hour. If you prefer to use the keyboard, you can use a shortcut when entering a time. For example, enter 9a and the field will convert the value to 9:00 AM.

**Learn your control keys** – Press Ctrl C for Copy, Ctrl V, for Paste, and Ctrl X for Cut. For example, you can easily copy/cut/paste from an outside application into Lodge-ical™. For example, you can copy the content of important emails that you receive and paste the content into your Correspondence Log.

**Dropdown Lists** - Any field with a down arrow next to it indicates a lookup table. If your lookup table holds a lot of data (i.e. client last names) it is optimal to first, press the down arrow next to the lookup window with your mouse. Then, begin to type in your selection and you will see that selection come closer to the “top” with each character you type. You can also press the F4 key to display the list manually. Your field must contain a value from the lookup table. Most lookup tables can be modified through the Maintenance menu.

**Scrolling through a recordset** – For single-record style forms, you will notice a record selector at the bottom of the screen. It usually looks like this:

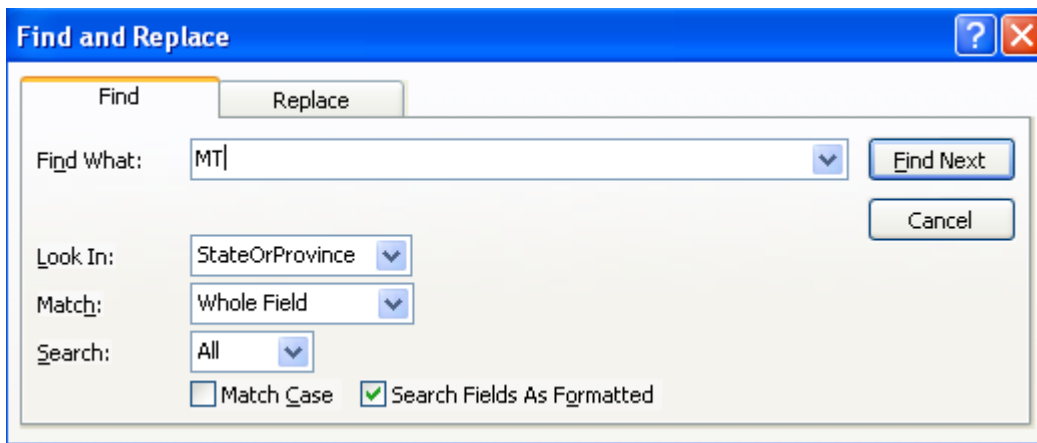


If you press on the left and right arrow heads with your mouse, you can scroll through the file, record by record. Press «| to go to the first record in the file. Press |» to go to the last record in the file. Press »\* to enter a new record. This record selector applies to multiple page reports as well allowing you to preview page by page.

**Sort Ascending and Descending** – there are forms in Lodge-ical™ which present data in a grid-like display. You can sort your data by any of the column headers. Single-click your mouse into the desired column, select Utilities from the Main Menu bar and then either Sort Ascending or Sort Descending.

**Form Filters** – you can limit the view of your data by using filters. For example, let's say you want to review all of your reservations arriving on August 1. Open up the Reservation Entry form and press the ALL button. Select a reservation with an arrival date of August 1. Highlight the entire contents of the field with your mouse, select Utilities from the Main Menu bar and then Filter by Selection.

**Find specific text** – Press Ctrl F to display the Windows Find form (or in some cases press the FIND button at the top of the form). The following will display:



1. Enter the text to search for in the field labeled Find What:
2. Use the Look In dropdown to select a particular field to look in
3. Use the Match dropdown to either look for an exact or partial match
4. Press Find Next to find a matching value based upon your data entry criteria

## Understanding Reports

**Report Filtering** - Most reports offer filter options to allow flexibility with the data that is presented on the report. For example, some of the Income reports offer this list of filter options:

Step 2: Select Dates

From:  To:

Which Date to Use?

Arrival Date  Departure Date  Booking Date

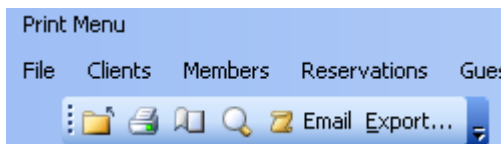
Step 3: Select Level of Detail

Summary  Detail

OK CLOSE

1. The date range that you enter can be either historical, current, or future.
2. The “Date to Use” selection allows you to choose your sort criteria; in this case the report will either sort by arrival date, departure date, or booking date.
3. The “Level of Detail” selection allows you to choose how much information you want to display.
4. Press OK to display the report.

**Print Options** – all reports will go to print preview mode. A print menu and report toolbar will also be associated with each report.



Use the Print Menu or use one of the graphical icons to select your next move. In order, the graphical icons are defined as follows:

**Close** (the folder icon) – choose this to close the report. You can also choose File/Close. If you select File/Exit, you will exit out of Lodge-ical entirely.

**Print** (the printer icon) – choose this to print the report to your default printer.

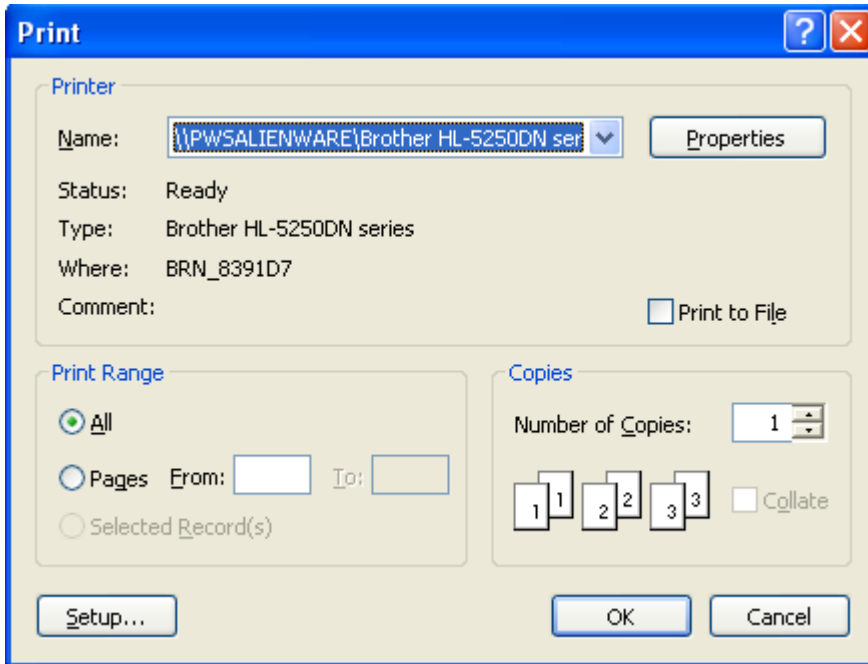
**Page Setup** (the page icon) – choose this to open up your Page Setup menu, to temporarily change your margins before printing to printer

**Zoom** (the magnifying glass) – choose this to zoom in/out the detail of your report. You can also zoom in/out by “clicking” any section of the previewed report.

**Email** – choose this to email the report. This function works with Microsoft Outlook/Express only and will open up an email with the report attached to the email.

**Export** – choose this to export the report. The most common export options are either to an Excel format (.xls) or to a rich text format (.rtf). The rich text format can be opened up using Microsoft Word.

**Control your printing** – most reports in Lodge-ical™ will go to a Preview mode first. Press Ctrl P to display the “normal” Windows Print menu.



From here you can select another printer or select certain pages to print.

**RECOMMENDATION:** We recommend that you consider purchasing a .pdf writer program. This would allow you to print a report to a .pdf format and then you can attach the.pdf file to your email. This is especially useful when you email confirmations to your guests. Using a .pdf format will preserve the attached document.