

Lodge-ical News – May 2006

Many of our clients are gearing up for their peak season. We hope your summer is successful and safe. Please continue to read these newsletters during your busy season. You might learn a new way to do your business!

User Tip: The importance of assigning a category and a method to a payment

A lot of users, when entering data into Lodge-ical, like to take shortcuts and enter the least amount of information required. However if you take the time to be more complete in your data entry, your database will increase in value. A good example of this is entering payments as they are received.

The Payment Category dropdown is most important when indicating a deposit (vs. a final payment). Lodge-ical has certain reports that look for the category equal to "DEPOSIT". The best example in both version 6 and 7 is the Deposit Accrual report. This report will show you all deposits sorted by the month they will be recognized (that is, the arrival month of the reservation). You can also print a report sorted by payment category which could help you easily determine who has and has not paid a deposit.

The Payment Method dropdown is also important especially when tracking credit card payments. If used completely, you should be able to print a payment received report sorted by payment method to compare against your monthly bank statements and use it during reconciliation. This report is available in both version 6.0 and 7.0.

Version 7.0-

We have created even more reports that look for a payment category equal to DEPOSIT. The Reservations-Pending vs. Confirmed report shows a concise listing of all reservations in order of whether or not they have paid a deposit. At a glance, you can clearly see those people who you need to follow up with to ask for a deposit. The Comparisons report has been enhanced in version 7.0 to show you an accurate picture of your deposit collection from one time period compared to another time period. Again, Lodge-ical looks for the DEPOSIT category.

User Tip: How to maintain and care for your Lodge-ical database – Part 3

What happens when you delete an item from a maintenance table (i.e. Inquiry type, Referral source, etc.)? If you run a historical report that looks at a maintenance item, you might see a row on your report without a title. This is because the relationship between the client table and the maintenance table has been broken (sometimes referred to as "orphan record"). The report loses its value. As mentioned before, we recommended you inactivate the item in the maintenance menu instead.

Version 7.0-

The Lodge-ical database has been tightened up so that you will not be caught with an orphan record. There are two new features that relate to this symptom.

Feature #1 – You will not be able to delete any record in the maintenance menu that is already assigned to a record in the client table. Here is an example; you have an advertising source called "Trade Show". You assign the advertising source to multiple clients. You later decide that trade show is too generic and you would rather capture which trade show. You set up additional advertising sources for specific trade shows. Since you no longer need the generic item called "trade show", you attempt to delete the record. You will receive a message that you are not allowed to delete the record as it is already assigned to records in the client table. This should be your indication to simply inactivate the item.

Feature #2 – If you change a name in the maintenance menu, it will automatically change the name of all client records who have this item already attached. For example, you set up an Inquiry Type equal to "Corporate". You assign this inquiry type to multiple clients. You later decide that the word corporate is not correct, but you would rather see the name "Retreat". You can go to the Maintenance menu and change the inquiry type from corporate to retreat. This will automatically change all clients who have an inquiry type equal to corporate to retreat.

We believe these two features will keep your database clean allowing you to stay on top of your marketing efforts.