

Upcoming Follow-ups

The Correspondence Log is tied into a reminder system allowing you to set up follow-up dates. You should refer to this form each day to review the required follow-ups.

Follow-up Date	Contact / Company	Correspondence Type	Date	Notes
Tue 6/15/10	Leslie P. Frankfurt Frankfurters Inc	Phone call - received	9/20/2009	Interested in a summer fishing/horseback trip. -kw
Thu 6/17/10	David E Donahue	Preconfirmation	5/18/2010	
Thu 7/8/10	Michael B Thomas	Preconfirmation	6/8/2010	

Display: Next 7 days: Next 15 days: Next 30 days: All Future Records: All Previous Records:

Record: 1 of 3 (Filtered)

The bottom of this form allows you to select follow-ups within the next 7 days, 15 days, 30 days, all future correspondence, and all previous correspondence with outstanding follow-up dates.

You can go directly to the client or the reservation to view the entire profile. Once you are in the Client Entry form or the Reservation Entry form, press the CORRESPONDENCE button to enter any notes from your follow-up correspondence.

Press the "Print" button to print a report showing all correspondence based upon the filter you selected at the bottom of the form.

ATTENTION: Make sure you "uncheck" the Follow-up checkbox within the Correspondence Log so that Lodge-ical™ will no longer record this as an outstanding follow-up (i.e. it will remain as a "Previous Record" needing follow-up).

RECOMMENDATION: You can choose the "Upcoming Follow-ups" form as your start-up form via Maintenance/Business Information/System Defaults.