Documentation of the Lodgit Desk Hotel Software

Version 3.0.5, last updated 2023-07-28 08:25

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General information about Lodgit Desk

About Lodgit Desk

Lodgit Desk is a reservation and booking software that helps manage any and all accommodation services. It will make it much easier for you to manage accommodations in hotels, guest houses, apartments, holiday homes and more. The time you'll save when using this program can then be dedicated to your guests and your success. Lodgit Desk's low price makes it especially interesting for smaller accommodation establishments that simply couldn't afford such a program until now.

Larger accommodation services such as hotels, apartment buildings, holiday parks, camp grounds, youth hostels etc. really appreciate the ability to adjust everything in Lodgit Desk. The SQL database allows for them to add as many units and objects as their computer system will allow*.

The easy to use reservation schedule in Lodgit Desk will let you create bookings, manage units and guests, create and print invoices and manage special pricing for the new season without any hassle.

You can also utilise the optional online booking system that will enable you to receive bookings online through your own website. The Lodgit Online Booking System can synchronise with your local Lodgit Desk program regularly, so that your guests will know whether you have any vacancies available and book those right away. In case there aren't any vacancies for the time frame the guest has selected, there's a booking calendar that will show when other vacancies are available.

The most important features of Lodgit Desk:

- Graphical overview over all the rentable units and objects and their occupancy (reservation schedule)
- Quick search for vacancies by date

- Compilation of single and group reservations in the reservation schedule
- Object management (e.g. several houses and their rooms etc.)
- Guest management (single person, companies and groups)
- Create offers, booking confirmations and invoices
- Create different prices for certain time frames (e.g. seasonal prices, fair prices etc.)
- Accept and bill deposits
- Manage extras and services of any kind (incl. different tax rates)
- Packages for special offers, arrangements etc.
- Online booking system with automatic synchronisation (optional)

*This depends on the system of the computer (memory, processor etc.) which you have installed Lodgit Desk on and the license that was purchased.

Release Notes

Latest release notes for 2023

Previous release notes:

Your first steps with Lodgit Desk.

Description of the menu items

Here you'll find a description of the menu items in Lodgit Desk.

Menu File
  ◦ Create a backup and restore from backup
Menu Edit
Menu Bookings
Menu Administration
Menu Lists
Menu View
Menu Windows
Menu Help or Lodgit Desk

Menu: File
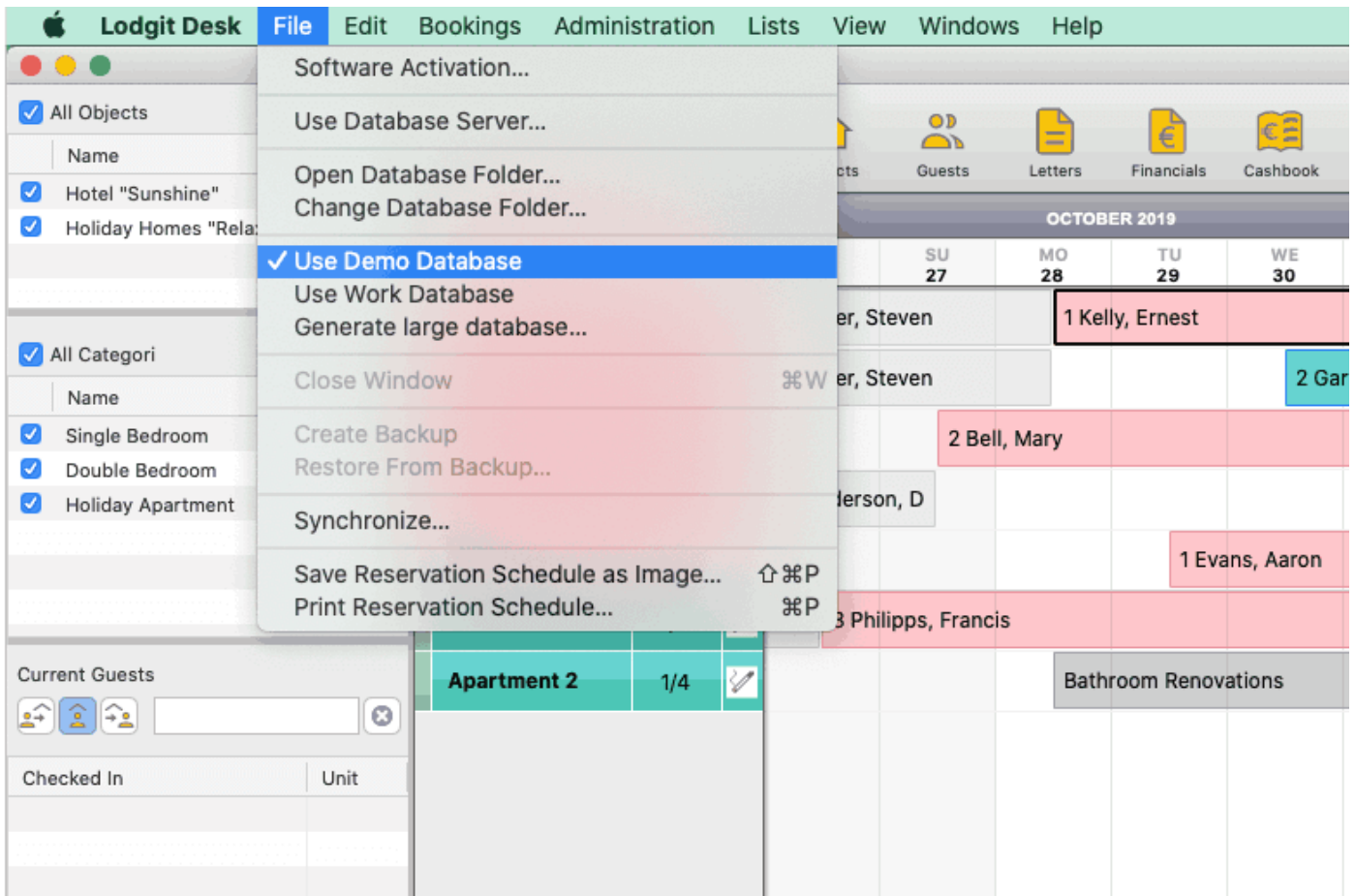
The menu bar item **File** contains general commands for the program Lodgit Desk.

Software Activation...

This is where you can enter your license information that allows you to use Lodgit Desk. The demo version of Lodgit Desk is limited to 30 days with a maximum of 30 guests allowed in your guest file.

> If you have registered and received a personalised demo license, you can use the full program for 30 days.
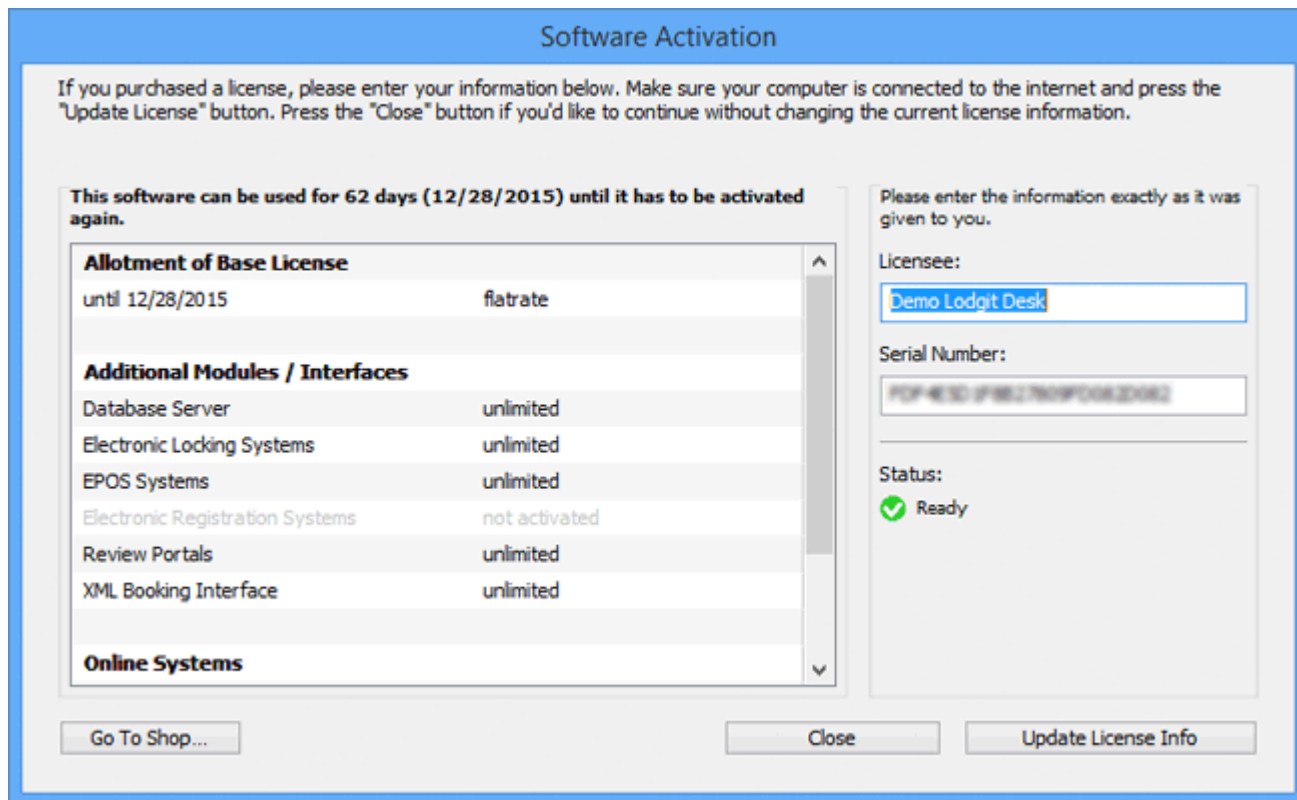
Use Demo / Work Database

More information can be found under Use the demo or the work database.

Close Window

This will close the currently open window (such as a booking window, NOT the main window).

Open / Change Database Folder

You have the option of using a different database.

Create / Restore From Backup

This will let you create a backup from your current database.

With the menu item "Restore From Backup" you can replace your currently used database with a backup file you have previously created.

Synchronise

This allows you to synchronise your Lodgit Desk with the Lodgit Online Modules.

Save Reservation Schedule As Image File

You can save the current reservation schedule the way you see it as an image file on your computer.

Print Reservation Schedule

You can also print the image of your current reservation schedule.

Quit

This will quit the program.

Create a Backup and Restore from Backup

Create backup file

To create a backup file, go to **File > Create Backup**. This will create a backup file (a copy) of your currently used database.
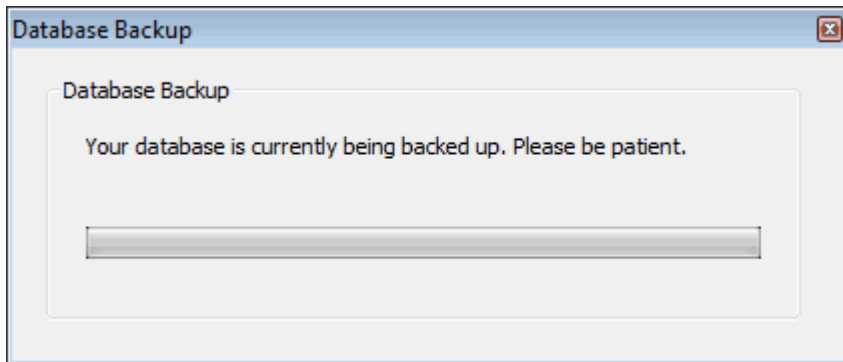
The location for the backup file(s) can be defined in the **Preferences** under **Backup**. You can also **backup your database automatically**!

Restore from backup

To replace a broken or lost database file with a backup file from your server, go to **File > Restore From Backup**.

This will open a window that lets you select a backup file. Go to the location of your backup files and select the file that you want to restore.

You will be asked to confirm the process.
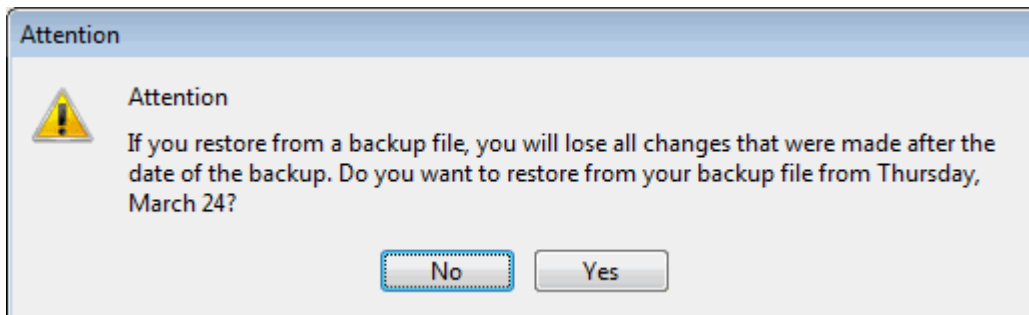
If you want to confirm, select **Yes**. If you want to cancel, click **No**.

MENU FILE   UP   MENU EDIT

Menu: Edit
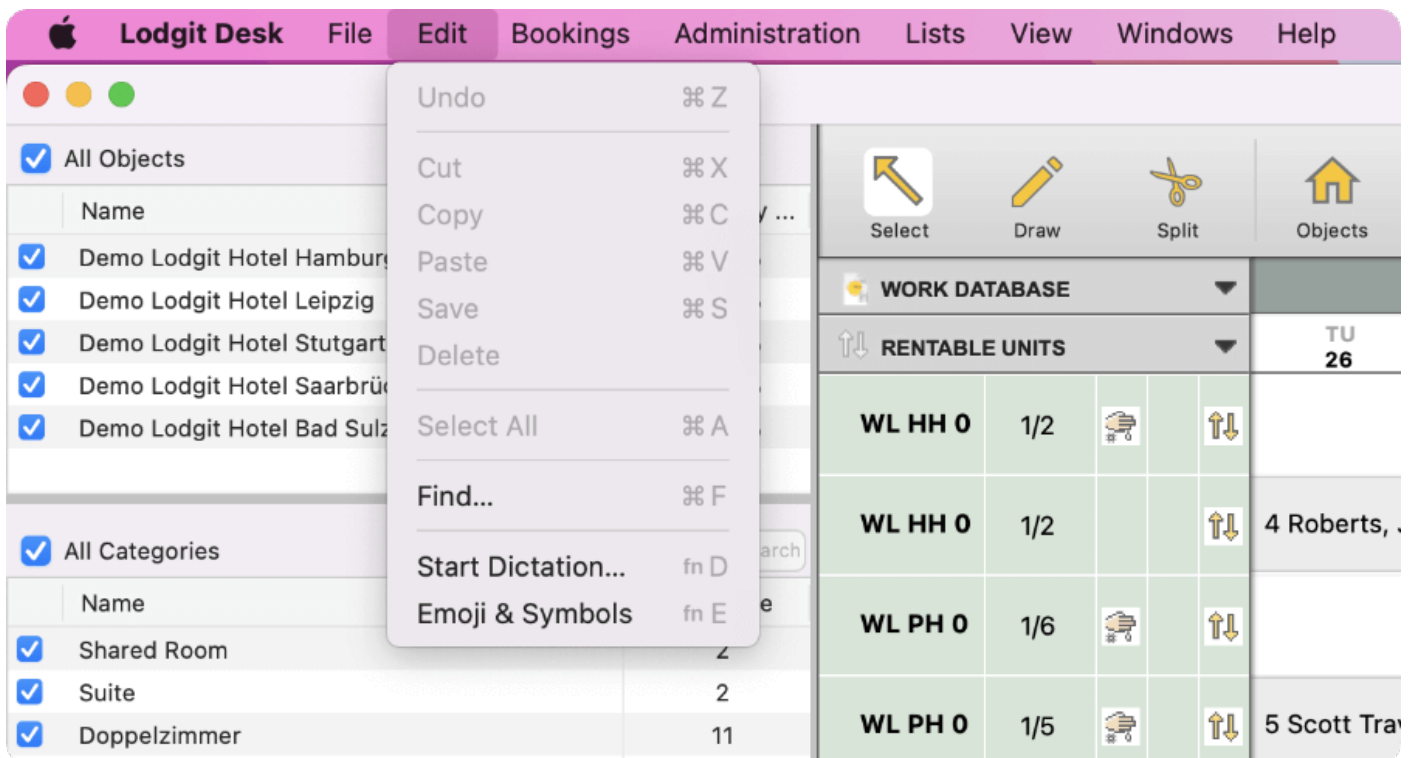
In this menu you will find the standard commands you already know from other programs: **Undo**, **Cut**, **Copy**, **Paste**, and **Delete** selected text as well as the search.

Search

By clicking on the menu item "Search" your cursor will jump to the closest available search box depending on which window is active.

> **Example:** *You can search all your bookings by using the search box at the top of the booking list in the main window.*

Preferences (Windows)

If you are using Lodgit Desk on Windows, you can find the **Preferences** here. For more information about preferences, see the chapter about preferences.

Menu: Bookings
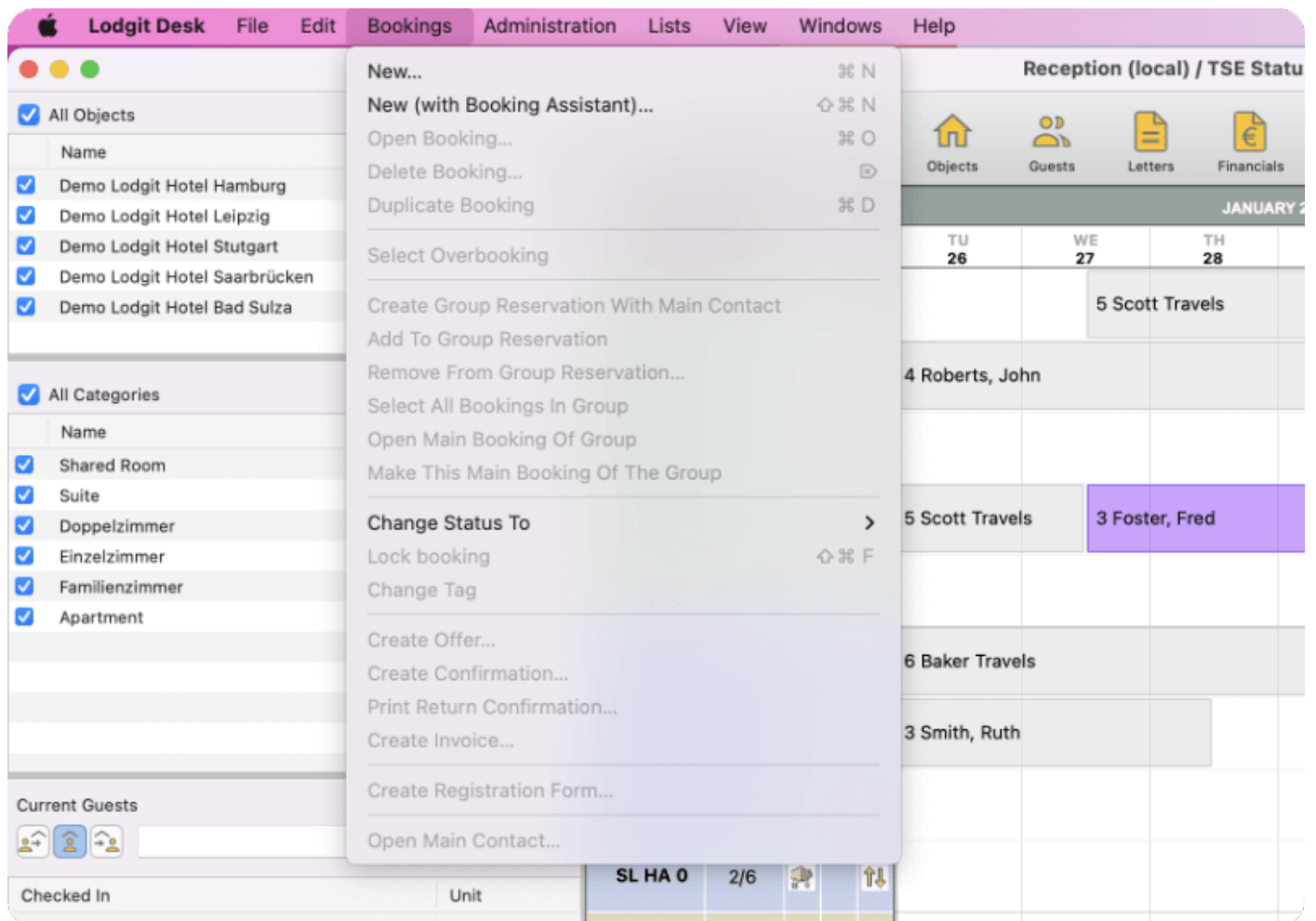
This is where you can manage your bookings. The menu commands you find here can also be called up in the context menu by right-clicking on a booking. More information about the bookings can be found in the chapter about bookings.

New

Create a new booking.

Open Booking

Open the booking that is currently selected in the reservation schedule.

Delete Booking

This will delete the selected booking. Deleting a booking has to be confirmed before the process is completed.

Select Overbooking

If you have selected an overbooking in the reservation schedule (two or more bookings that overlap in their time frame in one and the same unit) you can use this command to reach a booking that is completely covered by another one and that you could otherwise not reach.

To do that, select one of the double bookings. Make sure that when you select it, you are clicking into the overbooked area. Now you can go to "Bookings > Select Double Booking" and select the booking that you want.
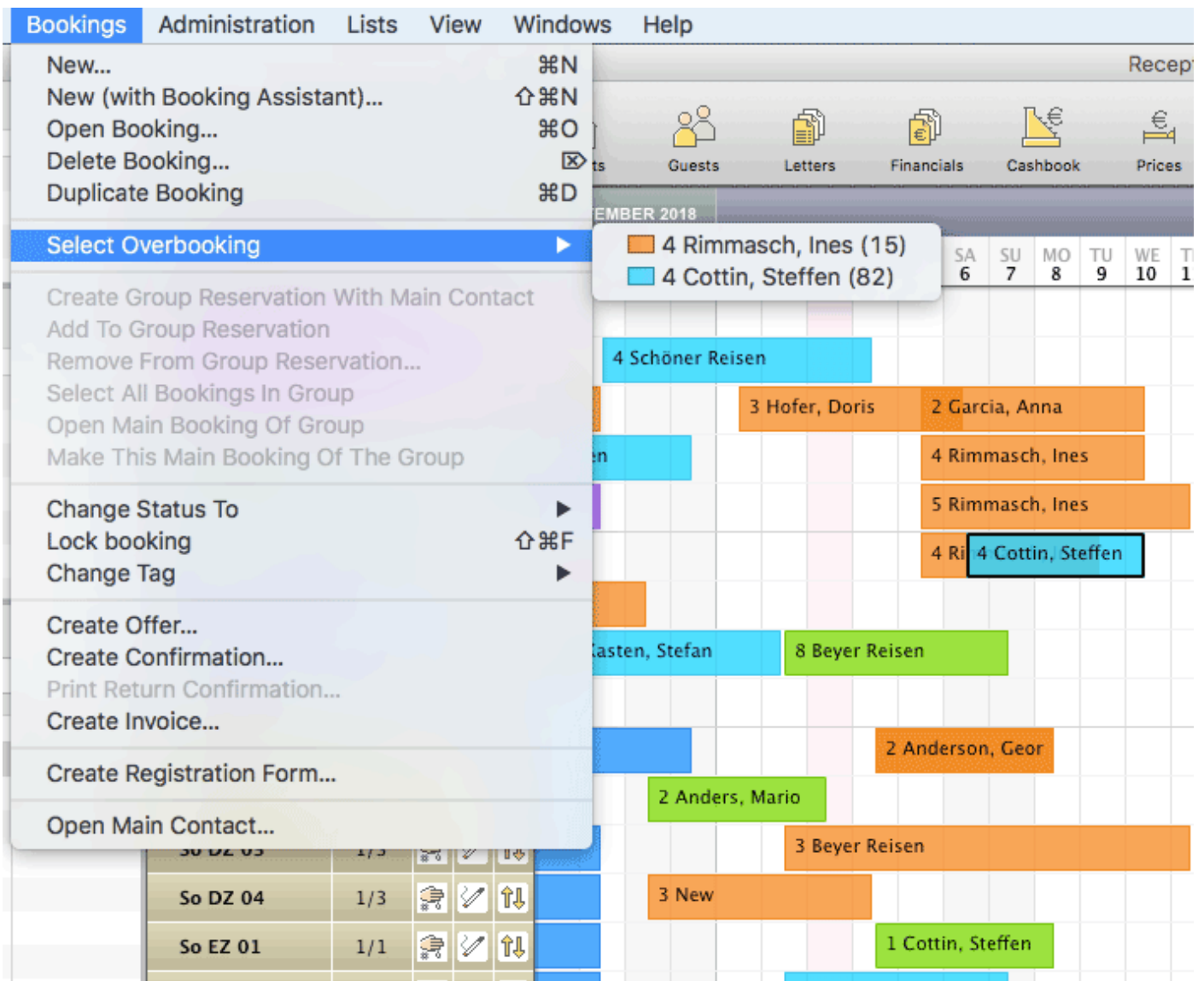
Now you can open the selected booking, drag the booking into a different time frame or rentable unit to clear the overbooking.

Duplicate Booking

Duplicate the currently selected booking. This copy will be created directly "above" the old booking and can then be dragged into a different time frame or rentable unit. This can help you with regular guests, since duplicating a booking not only duplicates the guests but also the booked extras.

Create Group Reservation With Main Contact

Combine several bookings (that are selected at the same time) to a group reservation with a main contact.

You can select several bookings at the same time by holding down the Shift key whilst selecting them. If the bookings are right next to each other, you can select them by clicking and dragging the cursor over them. Then, you can go to "Bookings > Create Group Reservation With Main Contact" and select the contact that you want to be the main contact for the group reservation. If you have only added a main contact to one of the bookings, you can only select that one.
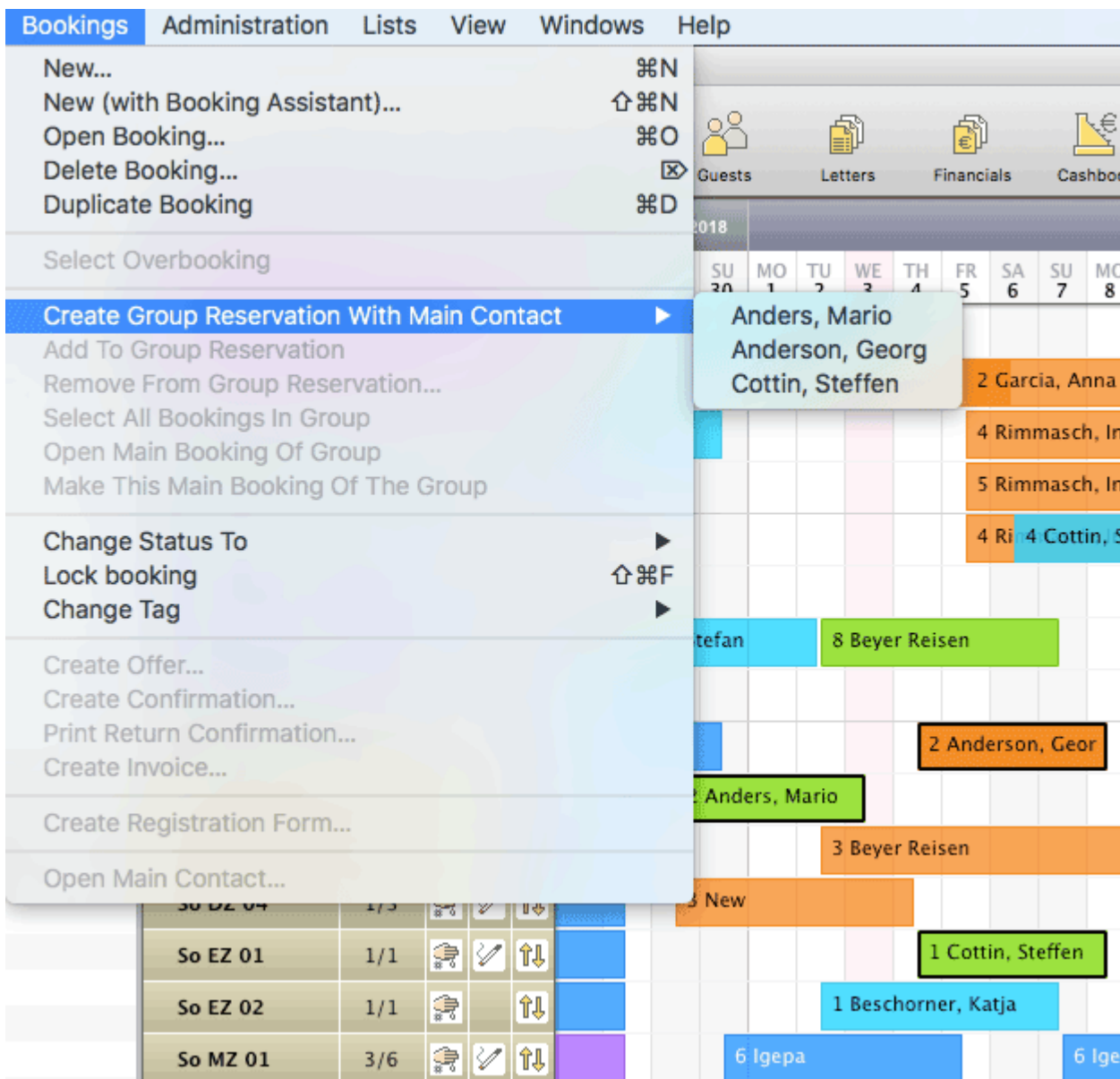
Add To Group Reservation

This will let you add a booking to a currently existing group reservation. Select the new booking as well as at least one of the bookings in the group reservation that you want to add the new booking to and then click "Add To Group Reservation".
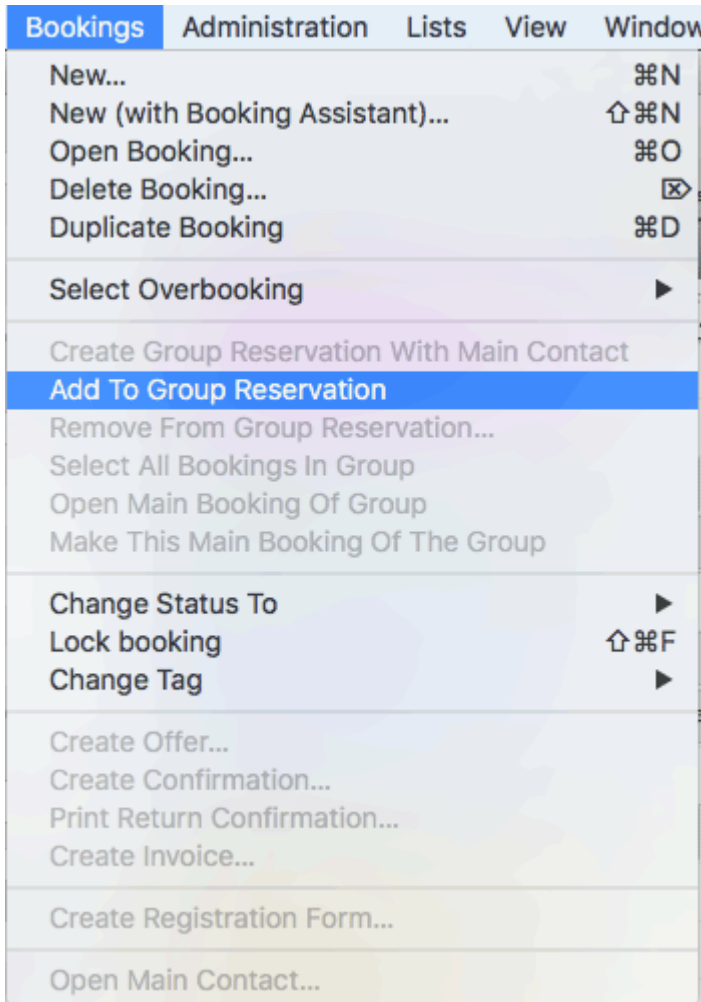
Remove From Group Reservation

Remove the currently selected booking from the group reservation.
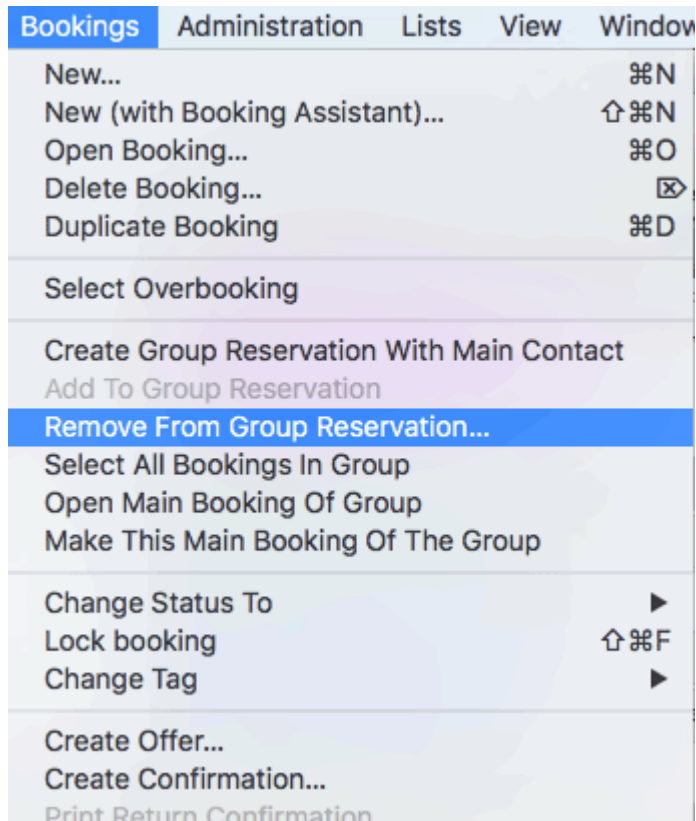
Select All Bookings In Group

Whenever you have selected one booking of a group reservation, you can use this command to automatically select all the bookings belonging to the group.

Open Main Booking Of Group

Whenever you have selected one booking of a group reservation, you can use this command to open the main booking of the group (the booking of the main contact).

Make This Main Booking Of The Group

Whenever you have selected a booking belonging to a group reservation, you can use this command to make this booking the main booking of the group.

> **Note:**
> Learn more about *group reservations here*.

Change Status To

Change the status of the currently selected booking (e.g. to "checked in").

Create Offer
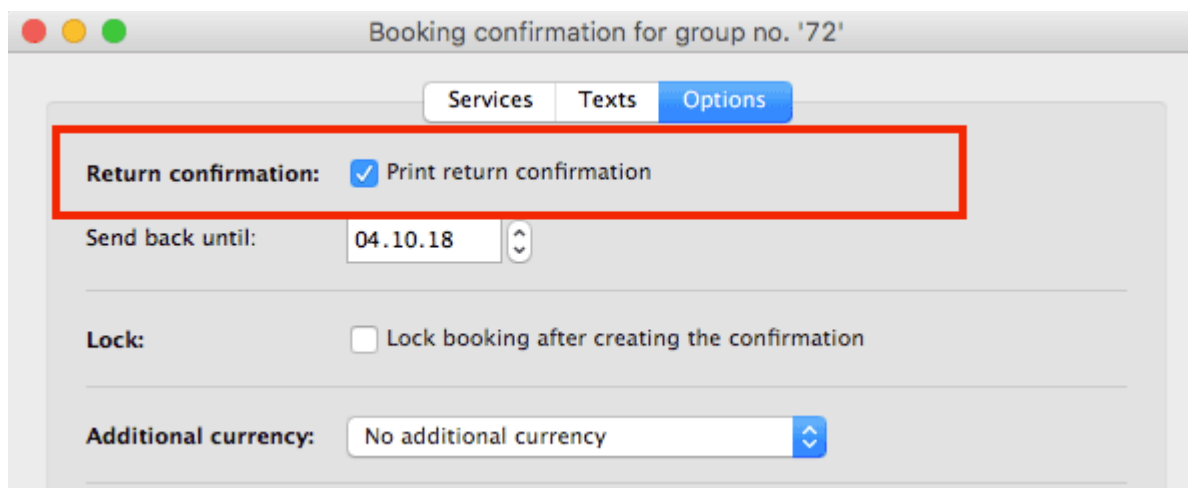
If a booking has the status "Tentative" or "Offer", you can use this command to create an offer for this booking. More information on creating offers can be found here.

Create Confirmation

If a booking has the status "Offer", "Confirmed" or "Online Booking", you can use this command to create a confirmation (and return confirmation) for this booking. More information on creating confirmations can be found here.

Print Return Confirmation

When you have created a confirmation for a booking and selected the box that says "print return confirmation", you can use this command to print the return confirmation (again).

Create Invoice

Whenever a booking has the status "Booked", "Checked In" or "Checked Out", you can use this command to create an invoice for this booking. More about creating invoices can be found here.

Open Main Contact

This command will open the guest file of the main contact for the currently selected booking.

MENU EDIT   UP   MENU ADMINISTRATION

Menu: Administration
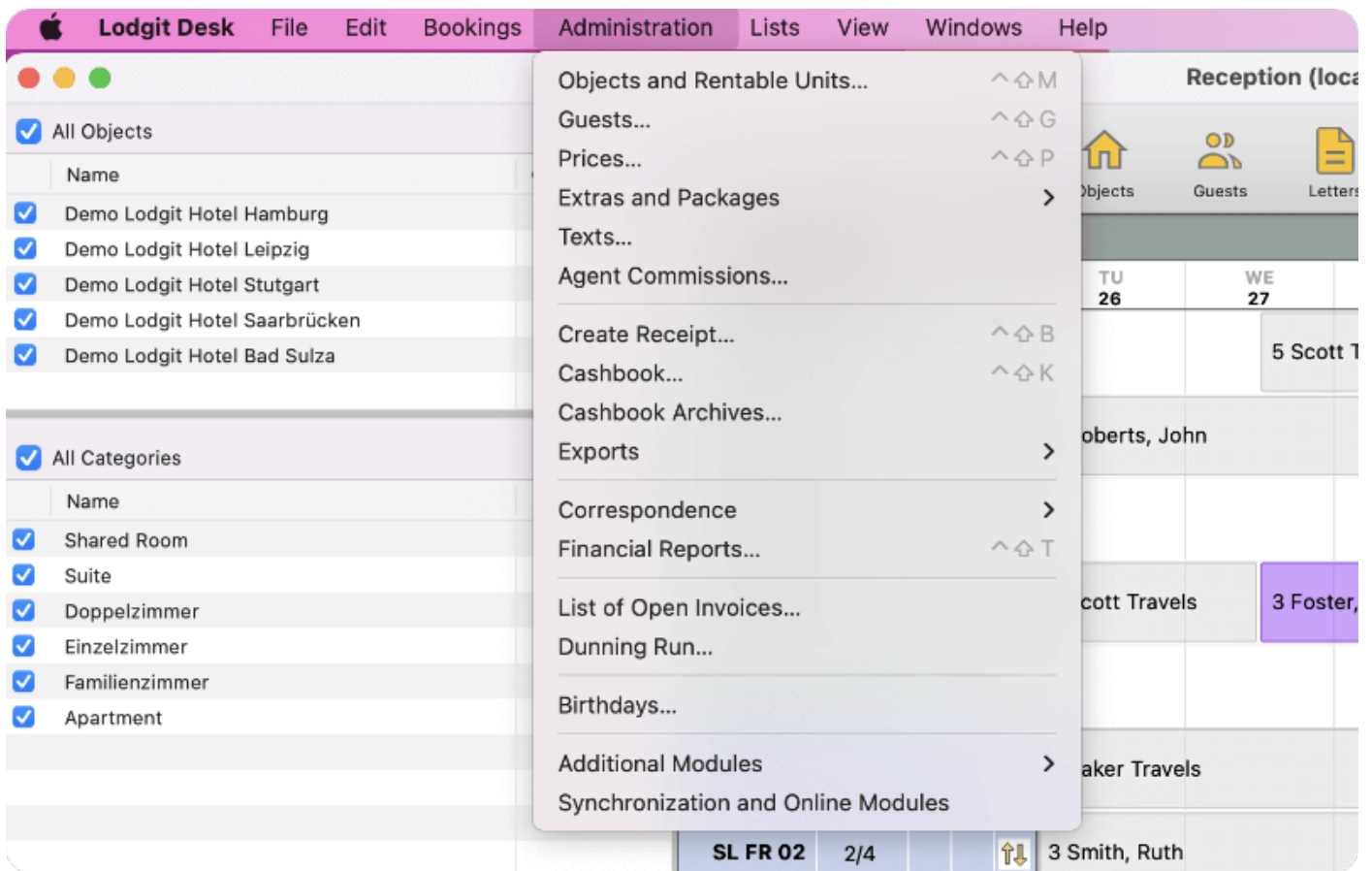
Objects and Rentable Units

This will open the window for objects and rentable units. Here you can add, edit and delete objects and units. More detailed instructions can be found here.

Guests

This will open the window for the Guest Management. This is where you can add, edit and delete guests. More information about this can be found here.

Prices

This will open the window for your price administration. here you can add and edit base-, category- and prices for certain units. A further explanation can be found here.

Extras and Packages

This will open the window for extras and packages. This is where you can add, edit and delete extras and packages. More information about this can be found here.

Texts

This will open the window for Text Management. This is where you can edit all printed texts as well as add and edit several languages or text sets (which can be adjusted to fit a season or a special event). More information about this can be found here.

Agent Commissions

This will open the window for agents. This is where you can add and delete agents as well as define how much commission you have to pay them. More information about this can be found here.

Create Receipt

Here you enter sales and purchases that are independent of bookings. More information about receipts can be found here.

Cashbook

All cash invoices and receipts for a specified period of time can be found here at a glance, enabling you to balance the cash register. More information about the cash book can be found here.

Cashbook Archives

An overview of past cash book balances. Further information can be found here.

Export

Options to export financial data from Lodgit Desk in case of a tax audit.

Correspondence

Here you can find and manage all your offers, confirmations, (correction) invoices, receipts and other correspondence in one central location. All documents can be viewed and printed again. If available, you can also quickly open the corresponding booking for a document and, if possible, change the paid status, invoice recipient and more, or cancel the invoice.

Financial Reports

Here you will find all invoices of a specified period at a glance. More information on the financial reports can be found here.

List of Open Invoices

Here you will find all invoices that currently have the status "open" with information on payment date, delay, dunning level, etc.

Dunning Run

Here you can check all invoices for invoices past due for reminders and create the corresponding dunning notices.

Birthdays

Guests who are about to have their birthday will be shown with this menu item. This reminder will come automatically if you have enabled it in the preferences.

Additional Modules

This is where you can download the **zip code database** and apply for a license for the **Salto Hotel Locking System** or the **EPOS System**. If you have already purchased a license for either or both of them, you can manage the modules here as well.

Synchronisation an Online Modules

Here you will find the settings for the Lodgit online booking system and the channel managers.

MENU BOOKINGS   UP   MENU LISTS

Menu: Lists
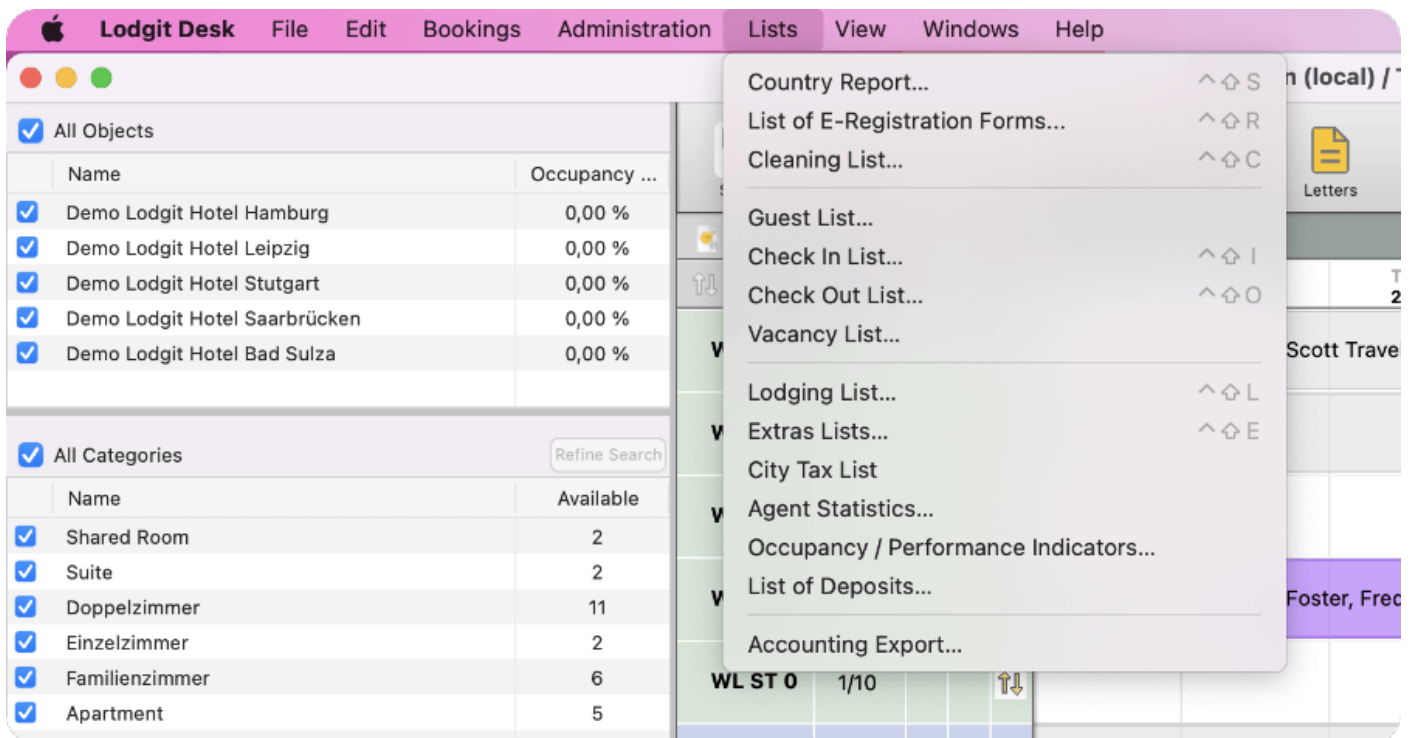
Country Report

A monthly analysis of your overnight stays. More information on creating reports by country.

Cleaning List

Here you can create and print a cleaning list.

Guest List

Here you can view a list of your guests over a specified time frame.

Check In List

This will show you a list of all guests that are checking in during a specified time frame.

Check Out List

This will show you a list of all guests that are checking out during a specified time frame.

Vacancy List

This list will show you a list of vacant units during a specified time frame.

Lodging List

Here you can view the revenue for the accommodation services for a specified time frame.

Extras List

Here you can view the revenue for the extras you are offering in a specified time frame.

City Tax List

Here you'll find a list of all the accommodation tax you have collected as per your bookings.

Agent Statistics

This is where you can view the revenue created by bookings that have come in through external agents.

Occupancy / Performance Indicators

Here you can find information about your occupancy and your RevPar (revenue per available room).

List of Deposits

Here you will find an overview of the created deposits.

Accounting Export

Here you'll find detailed invoice information that you can then export into a CSV file

for importing the data into your accounting software.

MENU ADMINISTRATION   UP   MENU VIEW

Menu: View
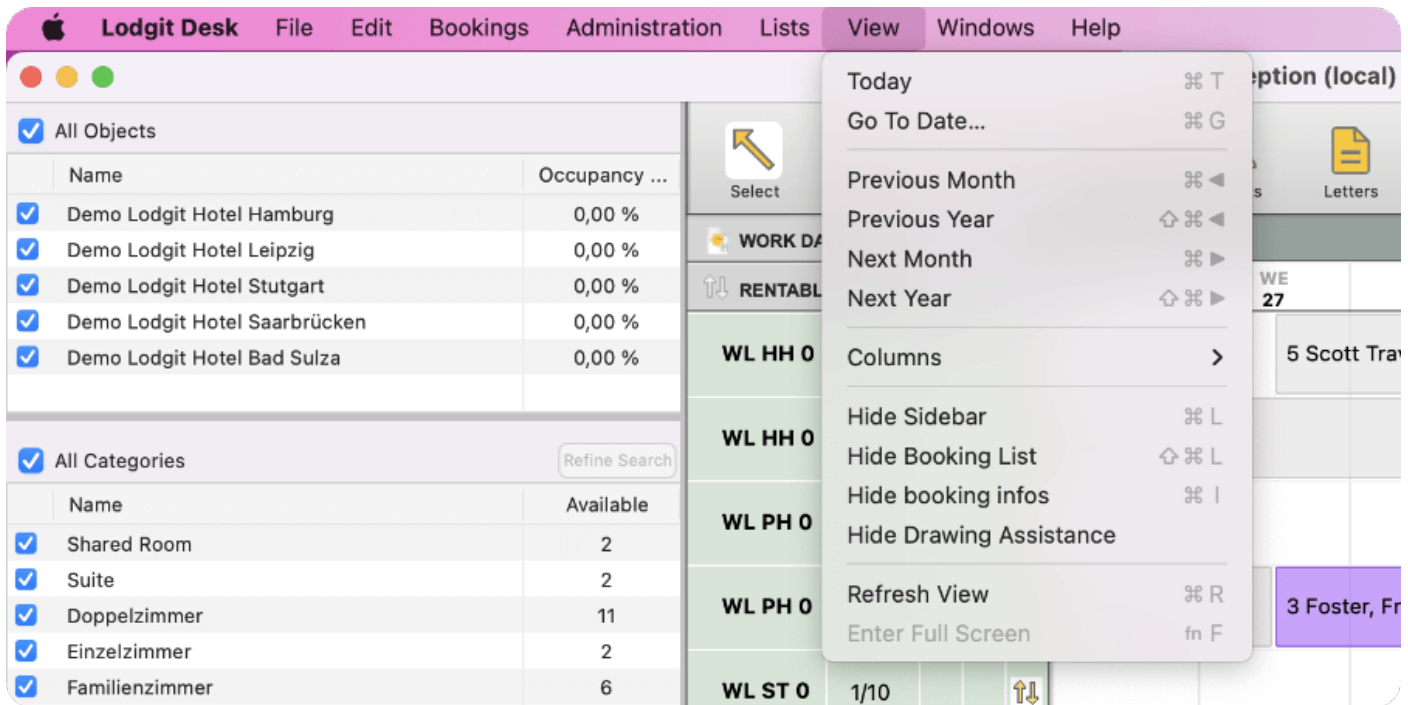
Here you can find alternative view options.

Today

This will move the reservation schedule so that the current date is in the center.

Go To Date...

This command will open a new window that will offer you options as to which date you want to "go" to.
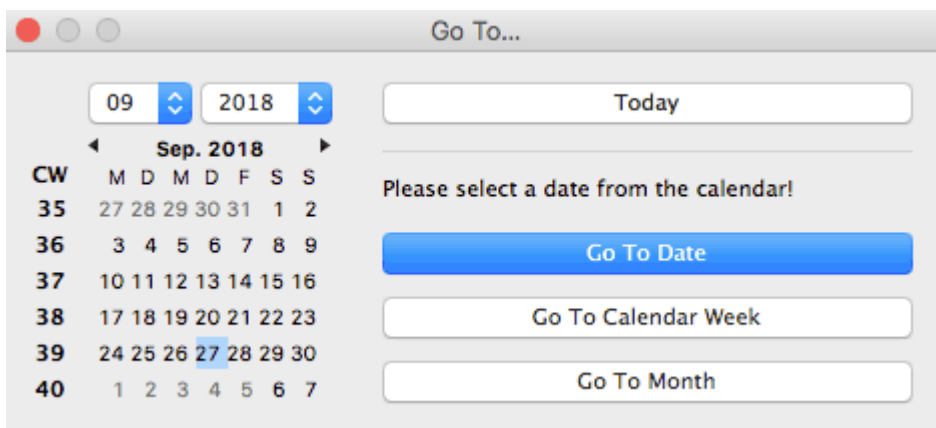
Once again, you can click the button "Today" to go to the current date. You can also select a date from the calendar on the left and then go to either that day, the calendar week or the month. If you want to go to a specific date, the reservation schedule will move so that the date is in the center. If you want to go to a time frame, the first day of this time frame will be shown at the far left of the reservation schedule.

Previous Month

The reservation schedule will go to the month before the currently shown one. If the currently shown date is February 2018, this command will show January 2018.

Previous Year

The reservation schedule will go to the year before the currently shown one. If the currently shown date is February 2018, this command will show February 2017.

Next Month

The reservation schedule will go to the month after the currently shown one. If the currently shown date is February 2018, this command will show March 2018.

Next Year

The reservation schedule will go to the year before the currently shown one. If the currently shown date is February 2018, this command will show February 2019.

Columns

You can decide which columns you want to show next to the rentable units in the reservation schedule:

- **Number of beds (min/max)**
- **Needs Cleaning**
- **Smoking**
- **Synchronise**

If there is a checkmark next to the category it means that this category is shown. If not, it is hidden.
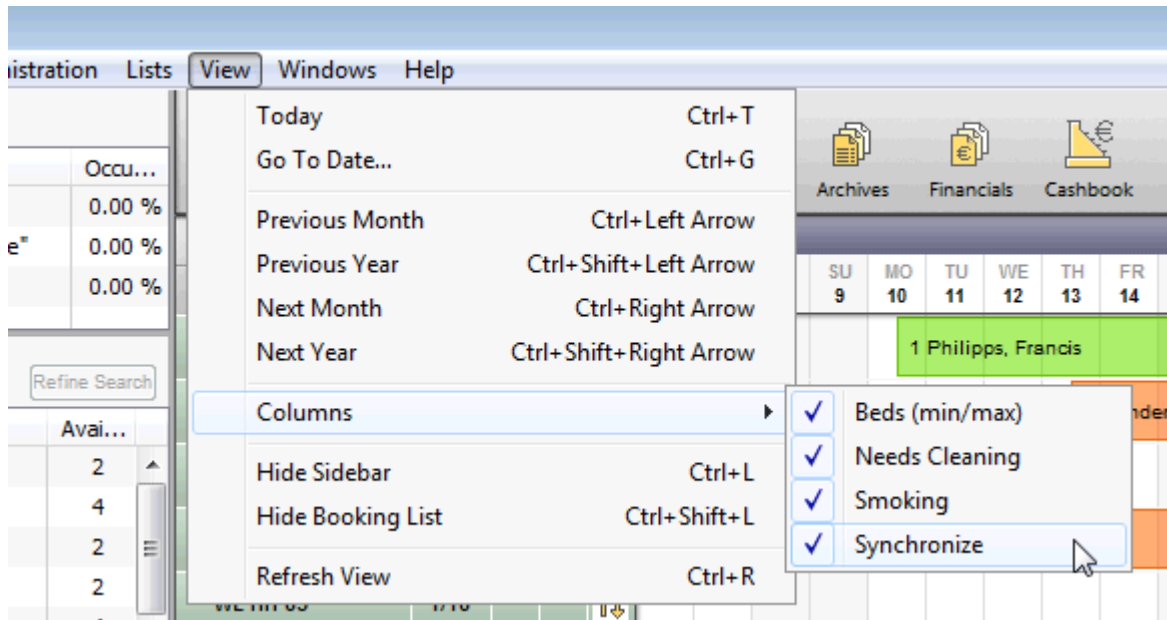
Sidebar

The sidebar to the left of the reservation schedule can be shown or hidden. When you first start the program, the default setting is for the sidebar to be shown.

Booking List

The booking list at the bottom of the reservation schedule can be shown or hidden. When you first start the program, the default setting is for the booking list to be shown.

MENU LISTS   UP   MENU WINDOWS

Menu: Window
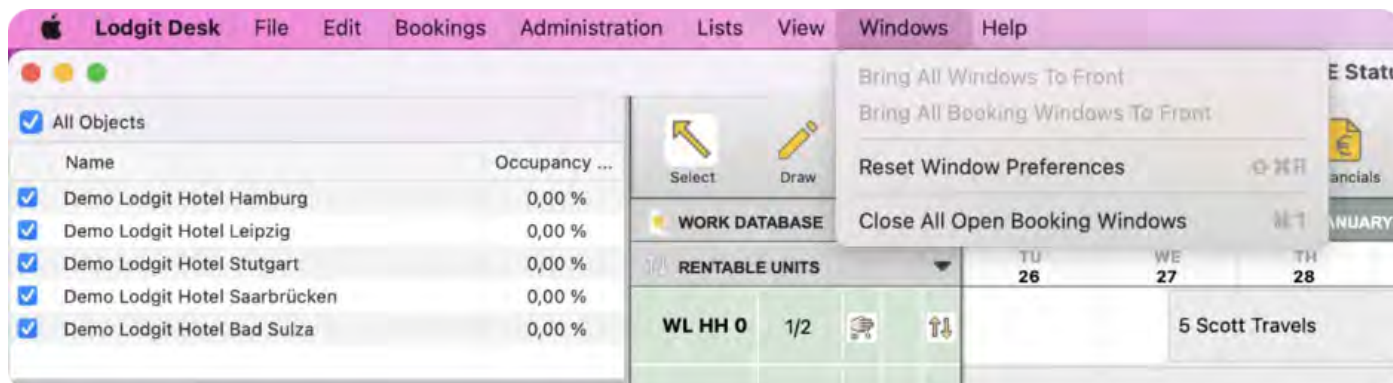
This menu will let you manage your currently open windows in Lodgit Desk.

Bring All Windows To Front

This will bring all currently open windows to the front.

Bring All Booking Windows To Front

This will bring all currently open booking windows to the front.

Reset Window Preferences

This will reset all window preferences, such as size and position, to the default settings. For example, you can use this to make sure that you can view all windows when you have switched from using two screens to only one.

Close All Open Booking Windows

This will close all currently open booking windows.

> **Note:**
> *Every open window will be listed in this menu so that it will be easy for you to select the one you want.*

Menu: Help or Lodgit Desk
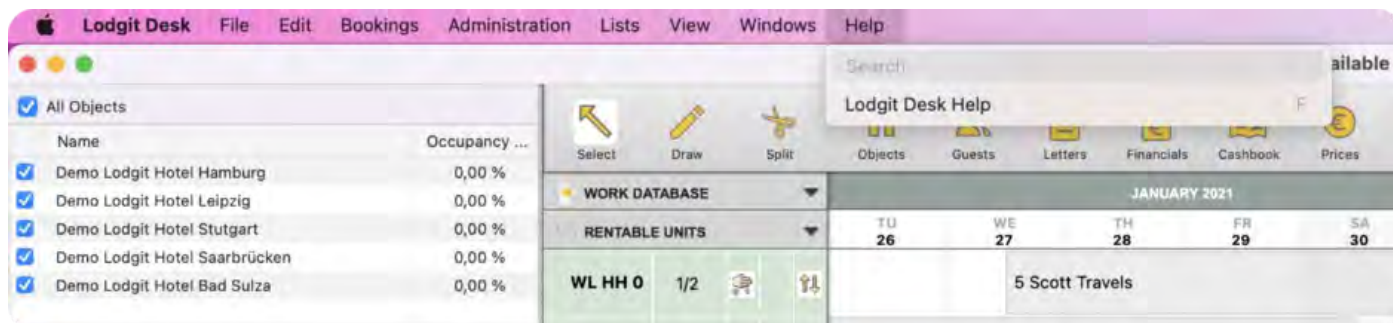
This menu contains the Lodgit Help. If you are using the software on a Windows Computer, you will find all these items under **Help**; if you are using an Apple Mac, you will find some of these items under **Lodgit Desk** and some under the menu **Help**.

Help (Windows)

Lodgit Desk Help

This will open the help file for Lodgit Desk.

About Lodgit Desk

Information about the program such as version and license information.
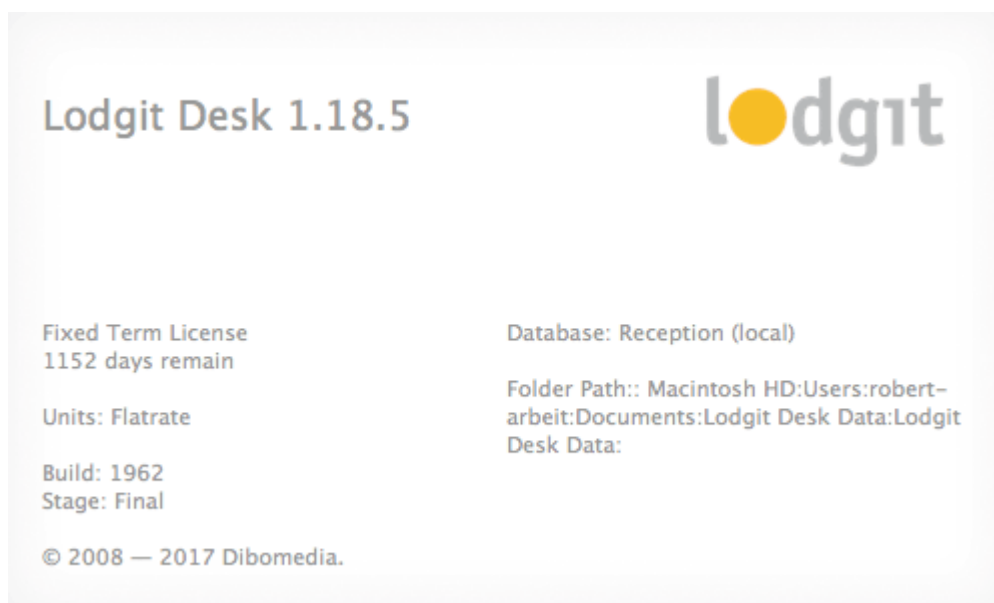
   Example: *About Lodgit Desk*

Visit Lodgit Desk Online...

This is a link to the Lodgit Desk website which will be opened in your default browser.

Release Notes

By clicking on this menu item you will find release notes and information about changes and bug fixes in newer program versions.

Check For Update

Lodgit Desk will check for an update. If a newer version of Lodgit Desk exists it will be downloaded and installed.

Diagnostics

This will let you create compressed data of the system information to send it to the Support Team.
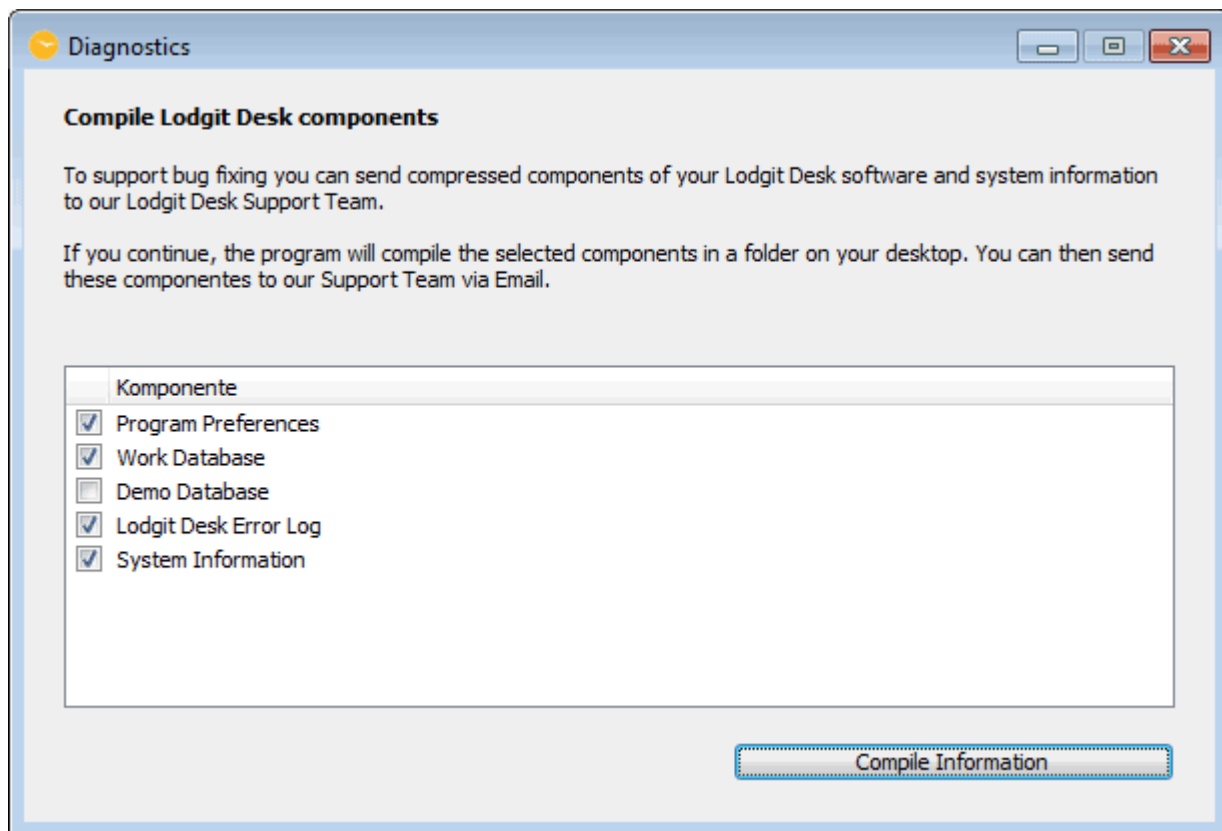
Create ticket...

You can directly send a support ticket from within Lodgit Desk:

Use your username and password for your account on www.lodgit.com to sign in; if you're an unregistered user, please enter an email address.

If necessary, attach the error log, system information and preferences file to your support ticket and hit "Submit".

Lodgit Desk and Help (Mac OS X)

If you're using Lodgit Desk on a computer with Mac OS X, the menu items above are in two menus.

The **Lodgit Desk Help** can be found in the last menu bar item **"Help"**.

All other commands are located in the first menu bar item **"Lodgit Desk"**. Under "Lodgit Desk" you can also find the **Quit Lodgit Desk** command and the **Preferences**. More information about the preferences you can find in the respective chapter.

MENU WINDOWS   UP   RESERVATION SCHEDULE

Reservation Schedule

In this chapter you find everything about Lodgit Desk's Reservation Schedule.
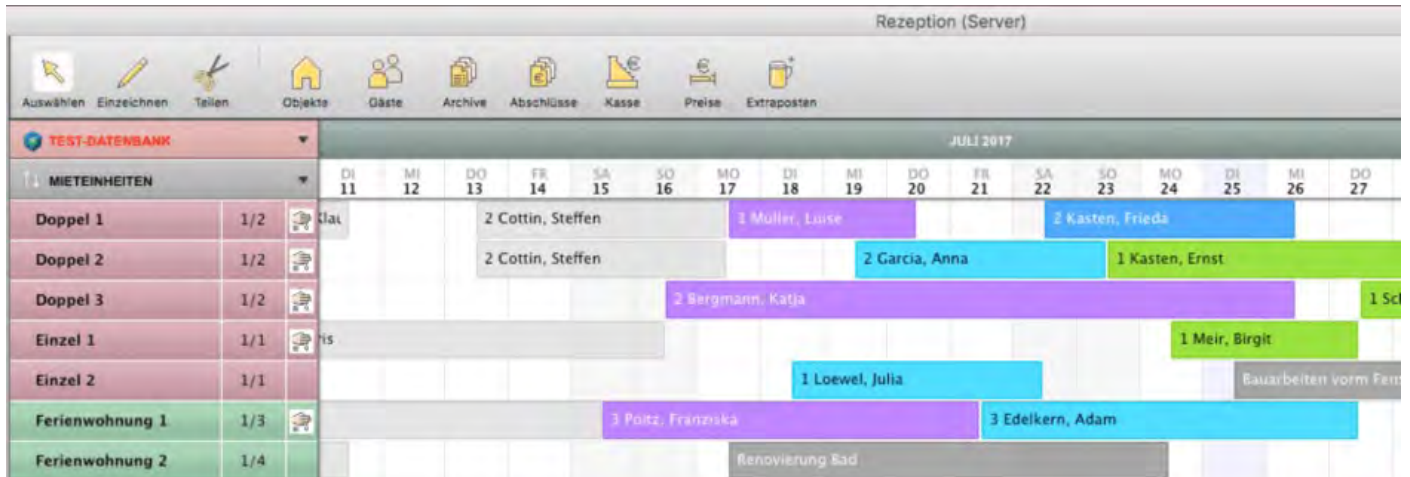
Select demo or work database
Navigate in the calendar
Sliders, Warnings and Symbols
"Select", "Draw" and "Split"
Sidebar
Search for vacancies
View vacancies
Current guests
Booking List
Overbookings
Change title of a booking in the reservation schedule

MENU HELP OR LODGIT DESK   UP   SELECT DEMO OR WORK DATABASE

Use the demo or the work database

Use the demo database

When you open Lodgit Desk for the first time, the demo database will be loaded.

This demo database can help you to try out all features of Lodgit Desk.
The database consists of dummy guests and bookings that you can use to get to know the program. You won't have to be afraid of altering or maybe even losing important guest data.

If you want to select the demo database while you're using the work database, simply go to **the left side of the reservation schedule** click on the arrow beside "work database" (above the unit names) and a drop down menu will open. From there, you can select the demo database.

All changes made to the demo database will stay in the demo database and not affect your work database.

Use the work database

The work database is the one that you will work with every day. Here, you'll use the real data for your hotel.

If you want to select the work database while you're using the demo database, simply go to **the left side of the reservation schedule** click on the arrow beside "demo database" (above the unit names) and a drop down menu will open. From there, you can select the work database.

RESERVATION SCHEDULE   UP   NAVIGATE IN THE CALENDAR
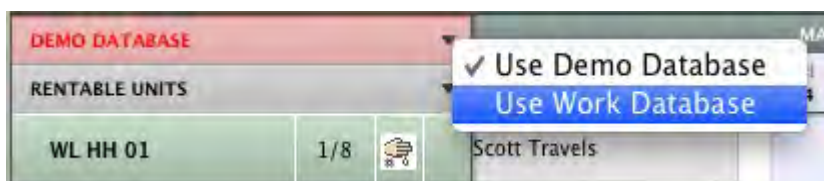
Navigate the calendar

Show current date

To show the current date in the reservation schedule go to **View > Today, double-click on the calendar bar in the reservation schedule,** use the **keyboard shortcut CTRL+T** (Windows) **or CMD+T** (Mac) or click on the "**Today**" button on the right below the reservation schedule. The current date will be marked purple (by default) in the reservation schedule.

Go to date...

To show a certain date in the reservation schedule, go to **View > Go To Date** or use the **keyboard shortcut CTRL+G**(Windows) **or CMD+G** (Macintosh). This will open the window "Go to...".
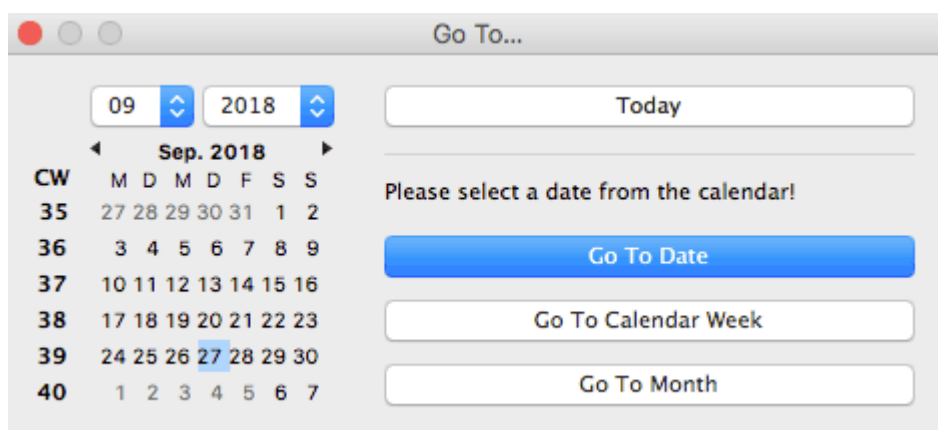
Here you can pick a date from the calendar and then decide what to do by clicking on one of the following buttons:

Go To Date: updates the view of the reservation schedule to the selected date

Go To Calendar Week: shows the reservation schedule beginning with the first day of the week

Go To Month: shows the reservation schedule beginning with the first day of the month

Jump from month to month in a year

In the reservation schedule, you can jump from month to month in any year by

clicking down on the calendar bar and dragging it from side to side. To speed up that process, press and hold the **CTRL** key. When you let go, the process will be stopped.

> ### *Alternative:*
> *You can also use the buttons at the bottom of the reservation schedule, or use the following keyboard shortcuts:*
>
> *Button:* ► *or **Ctrl (CMD)+right arrow***   *– next month*
>
> *Button:* ►► *or **Ctrl (CMD)+Shift+right arrow** – next year*
>
> *Button:* ◄ *or **Ctrl (CMD)+left arrow***   *– previous month*
>
> *Button:* ◄◄ *or **Ctrl (CMD)+Shift+left arrow** – previous year*

SELECT DEMO OR WORK DATABASE   UP   SLIDERS, WARNINGS AND SYMBOLS

Sliders, warnings and symbols

Sliders

The scaling of the reservation schedule can be defined by using the sliders at the bottom and the right.

Example:

Warnings

Assign Booking

If you use the additional module Online Systems or Channel Manager, an online booking may have been transferred to your local Lodgit Desk but could not be assigned to a rental unit. This can happen, for example, if a room is always available in a room category booked by the guest, but a room change would be necessary.

You will then see the following note in the lower right corner of your reservation schedule:

What do you have to do?

Please look in the booking list and filter there for >bookings without rentable unit.

Database malformed

If your database is malformed for any reason, you will see the following message in the lower right-hand corner of the reservation schedule:

What do you have to do?

Despite the problem you may still be able to use the database, so you can open, use and close Lodgit Desk as usual. Nevertheless, we strongly recommend that you immediately import an up-to-date backup. Please start with the latest backup. If the warning continues to appear after it has been imported, import the previously created (older) backup one by one until the warning no longer appears.

Show and hide symbols for units

Symbols

2/3	Number of beds (min/max)
	This unit needs to be cleaned.
	Smoking is allowed in this unit.

⇅   This unit can be synchronised with Lodgit Online Modules.

To show or hide those symbols, go to **View > Columns** and select the columns you want to show or deselect the ones you want to hide.

> ***Alternative:***
> *You can also click on the arrow next to "Units" which will open a drop down menu where you can do the same.*
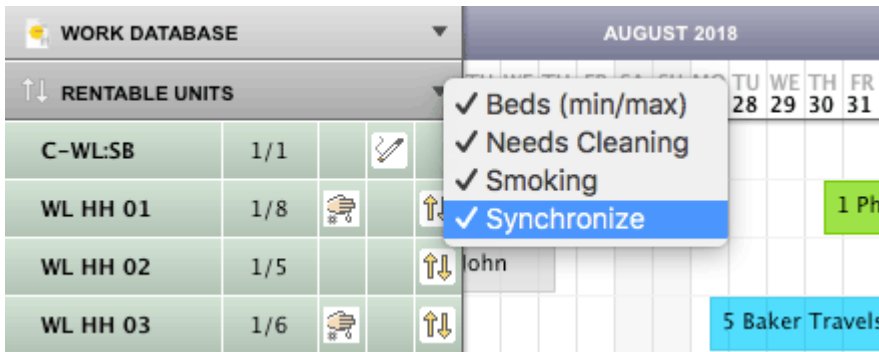
Change status of the symbols

You can also change the status of some of the symbols. That means for example that when a symbols says that a unit needs to be cleaned, you can change the status to "has been cleaned". Right-click on the symbol and the context menu will open. From there, you can then decide how to change the status.
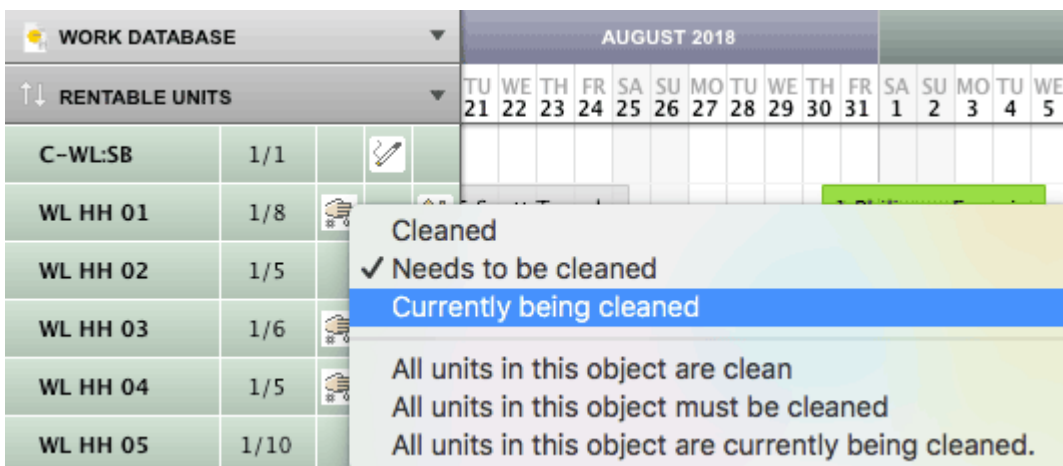
NAVIGATE IN THE CALENDAR   UP   "SELECT", "DRAW" AND "SPLIT"

"Select", "Draw" and "Split"

When using the reservation schedule in Lodgit Desk, you have 3 main tools that will be able to help you with the main tasks:

Tool "Select":

- move bookings
- lengthen or shorten bookings
- select several bookings at the same time (group reservations)

Tool "Draw":

- create a new booking

Tool "Split":

- split current bookings with checked in guests so that they can move into another unit

Note:
You can switch between all three tools by hitting the space bar!

SLIDERS, WARNINGS AND SYMBOLS   UP   SIDEBAR

Sidebar

The sidebar gives you important information that you can use along with the reservation schedule.

Showing only certain objects or unit categories

a. Object List
If you uncheck an object in this list, it will be hidden in the reservation schedule. Quickly showing or hiding objects can be done by checking or unchecking "All Objects".

b. Unit List
If you uncheck a unit category in the list, all units of this category will be hidden in the reservation schedule. Quickly showing or hiding all categories can be done by checking or unchecking "All Categories".
The right column "Available" shows you the number of vacant units in the time frame selected in the upper right corner of the reservation schedule.

c. Current Guests
This will show you lists of all currently checked in guests, guests that are due to check in today and guests that are due to check out today.

Occupancy Rate

In the upper left area, next to the object list, you can find the occupancy rate of each object for the time frame selected above the reservation schedule.

☑ All Objects	
Name	Occupan...
☑ Cabins "Water Lilies"	100,00 %
☑ Holiday Homes "Saguaro Lake"	25,00 %
☑ Hotel "Sunny Hills"	45,45 %

> **Note:**
> *You can turn this automatic display off in the Preferences. This can be a good idea if you don't need that information and are having problems with a slow-running program.*

Show or hide sidebar

In order to hide the sidebar, go to **View > Hide Sidebar**, or click and drag the left border of the reservation schedule to the far left side of the screen.
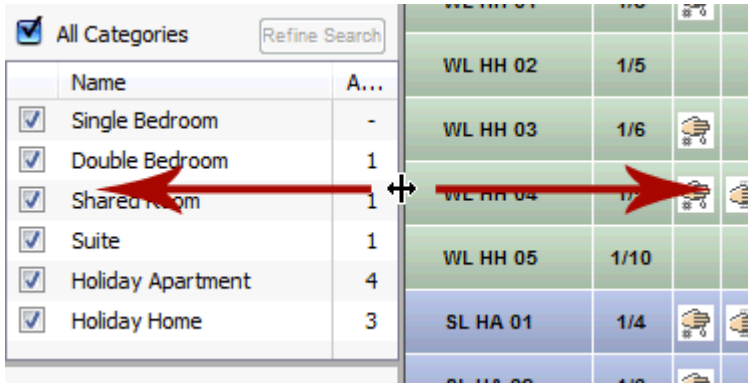
If you want to show the sidebar, go to **View > Show Sidebar**, or click and drag the left side of the reservation schedule until you are satisfied with the width of the sidebar.

Enlarge / shrink sidebar

To enlarge or shrink the sidebar, you can click and drag its borders to the left/right or up/down, until you are satisfied with the results.
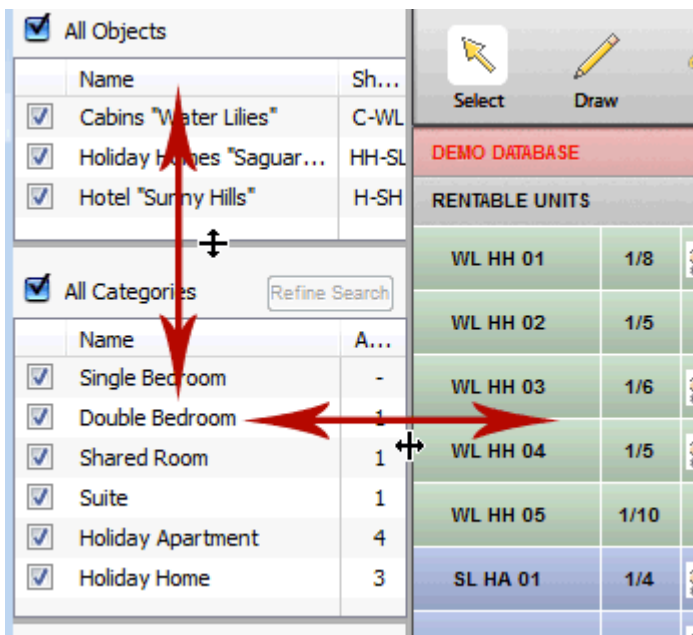
Enlarge / shrink list of rentable units

To enlarge or shrink the list of all rentable units, simply click and drag the right border of the list until you are satisfied with the result.

"Sᴇʟᴇᴄᴛ", "Dʀᴀᴡ" ᴀɴᴅ "Sᴘʟɪᴛ"   Uᴘ   Sᴇᴀʀᴄʜ ꜰᴏʀ ᴠᴀᴄᴀɴᴄɪᴇꜱ

Search for vacancies

The reservation schedule can also help you find vacancies in a specified time frame.

In the upper right corner of the reservation schedule you can enter the arrival and departure date. Press the search button or hit enter to confirm the dates.
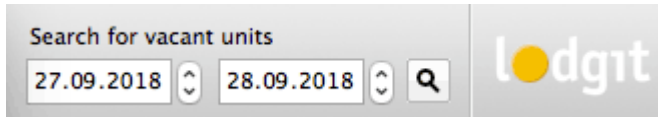
This will then search for vacancies in the time frame you have entered.

If you only want to view the units that are vacant during that time frame, you can press the button "Refine Search" in the sidebar that shows **all categories**. When you press the button again, the filter will be deactivated and all units will be shown again.

> ### Note:
> *After you have started the search, you can check and uncheck the boxes next to certain unit categories in the sidebar under **all categories** to filter the search.*

To quit viewing only vacant units, simply click into the **reservation schedule**.

SIDEBAR   UP   VIEW VACANCIES

View Vacancies

Aside from the object list and current guests, the sidebar shows you a list with vacant unit types:

The list depends on the time frame defined at the top right corner of the reservation schedule and is adjusted automatically when the time frame is changed.

> **Note:**
> *You can turn this automatic display off in the Preferences. This can be a good idea if you don't need that information and are having problems with a slow-running program.*

It is also refined depending on which objects you have selected and deselected. A deselected object's units will not be counted towards "available".

SEARCH FOR VACANCIES   UP   CURRENT GUESTS

Current Guests

At the bottom of the sidebar you'll find the "current guests". There you'll find all guests that are currently checked in, will check in today or will check out today. This will list all guests, main contacts as well as companions.

If a main contact will be displayed multiple times for multiple bookings and/or if the main contact is not a guest can be specified in the preferences.

You can sort this list by its columns (ascending and descending) by clicking on the column headers.

Pressing the button **Arrival Today** will show you which guests are due to check in today, pressing the button **Departure Today** will show you which guests are due to check out today.

> **Note:**
> *Guests that are overdue will be marked in red in the **Arrival Today** area.*

Double-clicking on a guest will open the booking window, which allows you to create an invoice quickly.

If there is a **note** for a guest that appears in this list, the 🛈 symbol will appear next to their name. Double-clicking on the symbol will take you to the guest notes.
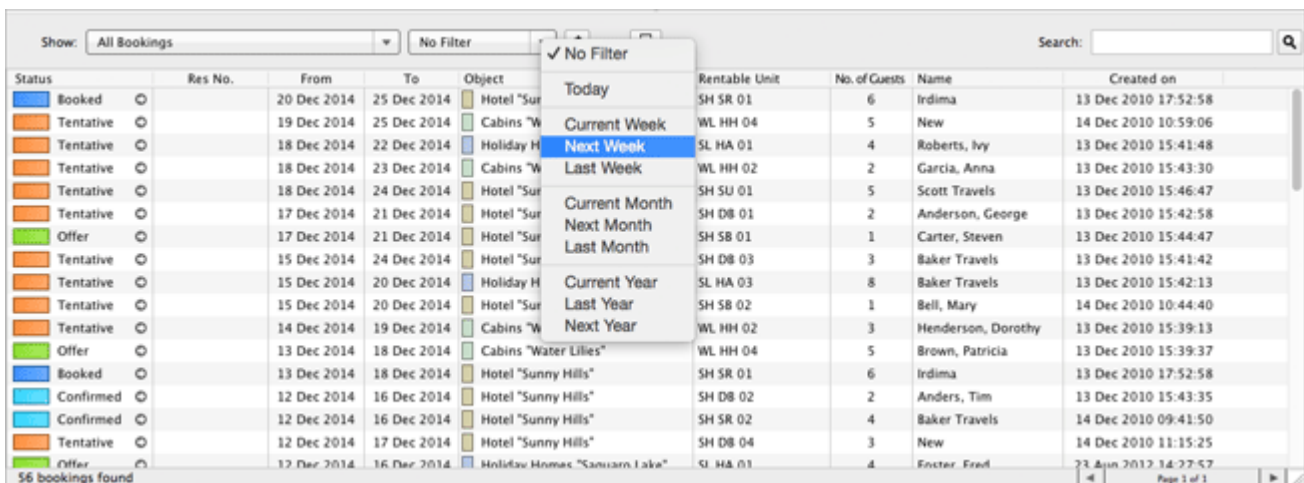
Guests who are regulars will have the ✳ icon next to their name.

Booking List

The booking list shows **all bookings from the reservation schedule**. You can sort the list by its columns.

Note:
After you've made changes in the schedule you might have to update the list by clicking on the update button: ⟳

By **double-clicking on a row** you can open the **booking window**. You can also open the booking window by using the context menu.

By clicking **the arrow symbol in the status column** ⟲ you can quickly go to a certain booking in the reservation schedule. The booking will be **selected** (shown with a bold black border around it) and the reservation schedule will adjust itself.

In the upper right corner of the booking list you'll find **a search form** that allows you to search through **all the booking data**. The search also extends to the guest information linked to the bookings.

If you want to **print this list**, press the print button: 🖶.

> *Note:*
> *Reservation numbers are given automatically to bookings that come from the online booking system. Bookings that have been made in Lodgit Desk itself cannot be given a reservation number.*

Preset selections for your most important tasks

There is a selection menu that allows you to filter the booking list:

All Online Bookings:
All bookings that were received via online synchronisation are shown. The submenu offers you the possibility to differentiate between online bookings received from the Lodgit online system or the channel manager.

New Online Bookings:
Only the online bookings that were synchronised with the last synchronisation are

being shown. A submenu also offers you the possibility to show only online bookings received through the Lodgit online system or the channel-manager.

Bookings without rentable unit:
This will list all online bookings that could not be directly added to a unit (e.g. because no single unit was vacant for the entire time frame). You can open the booking by double-clicking on the list entry and using the rentable unit drop down in the booking window to move the booking into the reservation schedule.

Offers - expired:
The booking list will only show bookings that have expired offers attached to them. Whenever a booking receives the status "confirmed" or higher, it will be no longer shown in the list (you may have to update the list).

Return Confirmations - expired:
This will only show bookings that were expecting a return confirmation but they are now expired. Whenever a booking is set to the status "confirmed" or higher it will no longer be shown in that list. You may have to update the list to see the changes.

Deposits - not yet billed:
This will only show bookings that have not yet billed a deposit.

Deposits - not yet received:
The booking list will only show bookings with deposit invoices that have not been set to "paid" yet.

Services - not yet billed:
This option will only show bookings that still have un-billed items. When the booking does not have any un-billed items anymore, it won't be shown in the list any longer. You might have to update the list to see the changes.

Invoices - not yet paid
This will show all bookings that are still unpaid. Once the invoice is marked as paid, the booking will no longer be shown in the list. You may have to update the list to see the changes.

Invoices - term of payment exceeded:
This will show all bookings that are unpaid after the due date has passed.

Double Bookings:
This will only show current over-bookings. Those are bookings in the present or future that are booked in the same unit with overlapping time frames.

In addition to that, you can also filter the list to only show a certain term, e.g. "Today" or "Next Year". Using this filter will only display bookings whose **booking time frame** fulfils the criteria.

Overbookings

The reservation schedule allows you to create several bookings that overlap and therefor cause a double booking (or overbooking). Wenn that happens, the two colours of the bookings will create a mixed color during the time of the overbooking.

To quickly view all double bookings in the reservation schedule, you can use the booking list below it. If you can't see the booking list, go to View > Show Booking List.

1. Select the filter option "Double Bookings" from the drop down menu in the booking list.

2. Press the arrow next to the status entry to view the booking in the reservation schedule.

3. Drag or alter the booking in the reservation schedule to resolve the double booking (you can also open the booking by double clicking on it and then change the time frame from there).
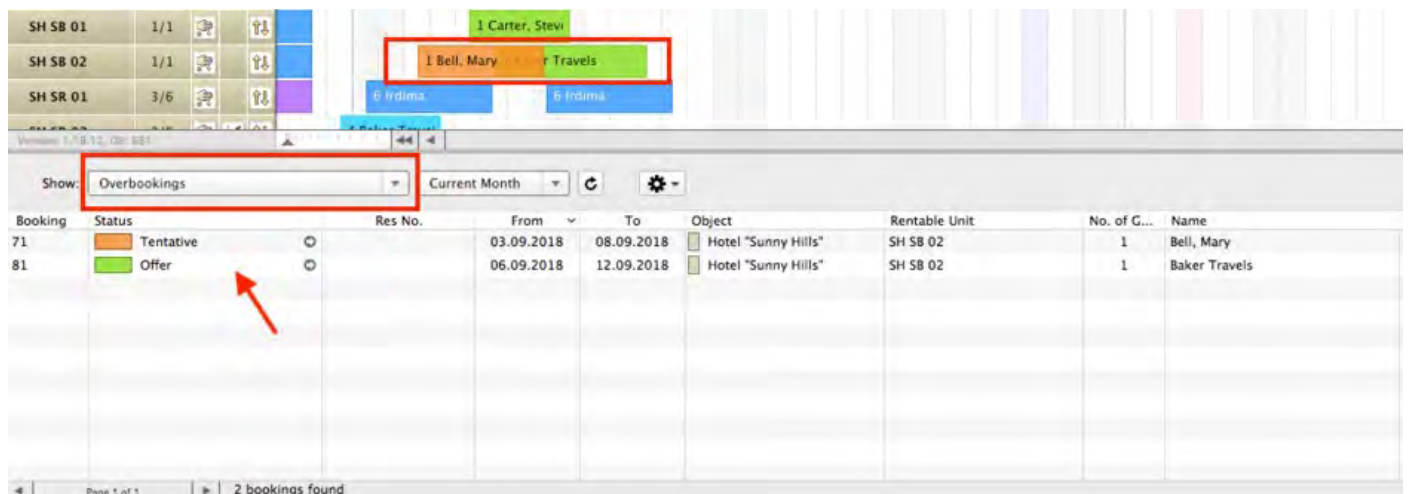
The **visibility** of double bookings depends heavily on the transparency of the bookings themselves. You can adjust those transparency settings under Preferences > Reservation Schedule > Colours. The best visibility of double bookings is achieved when using a transparency of about 40% (you can easily adjust that by pressing the reset button).
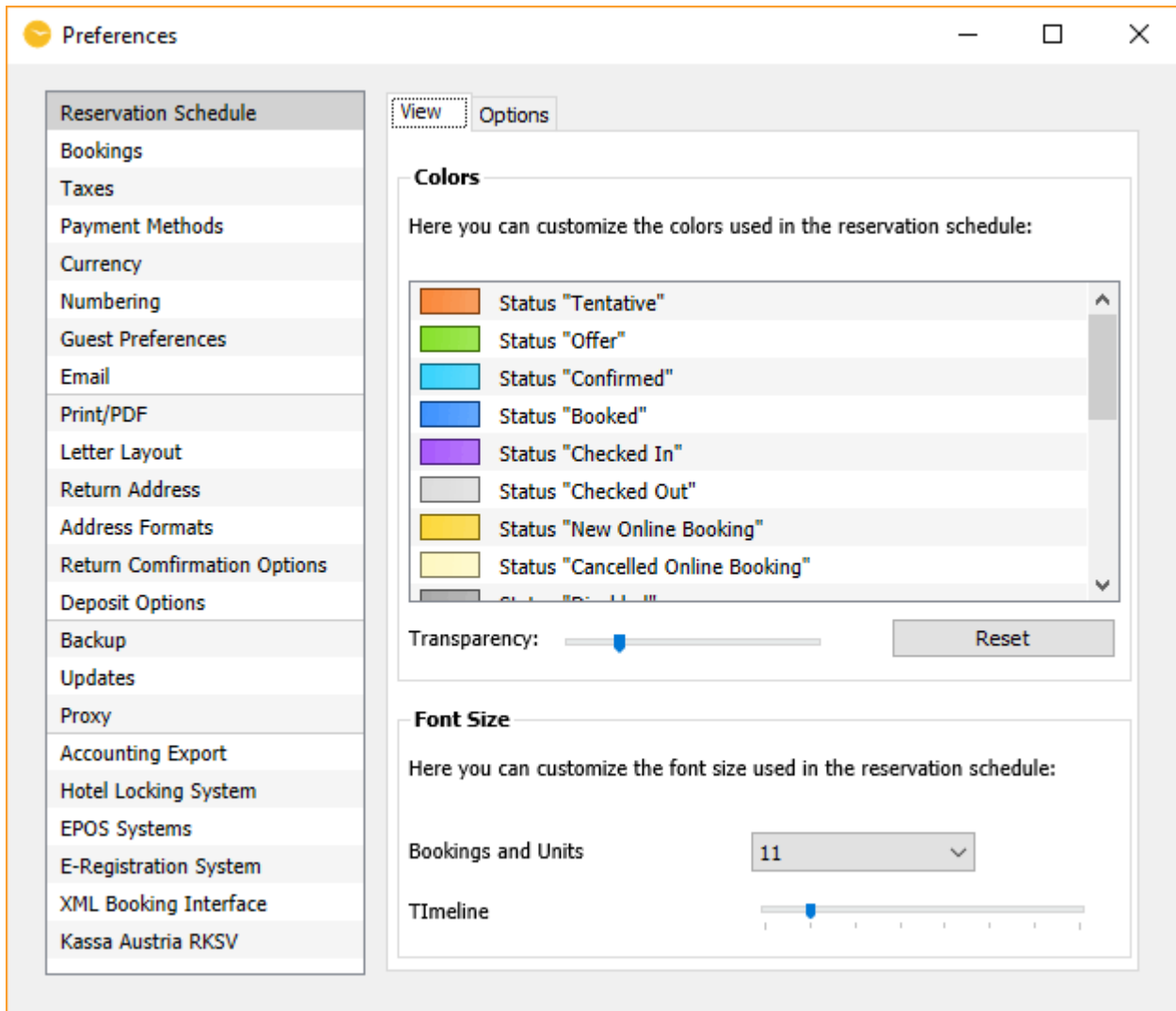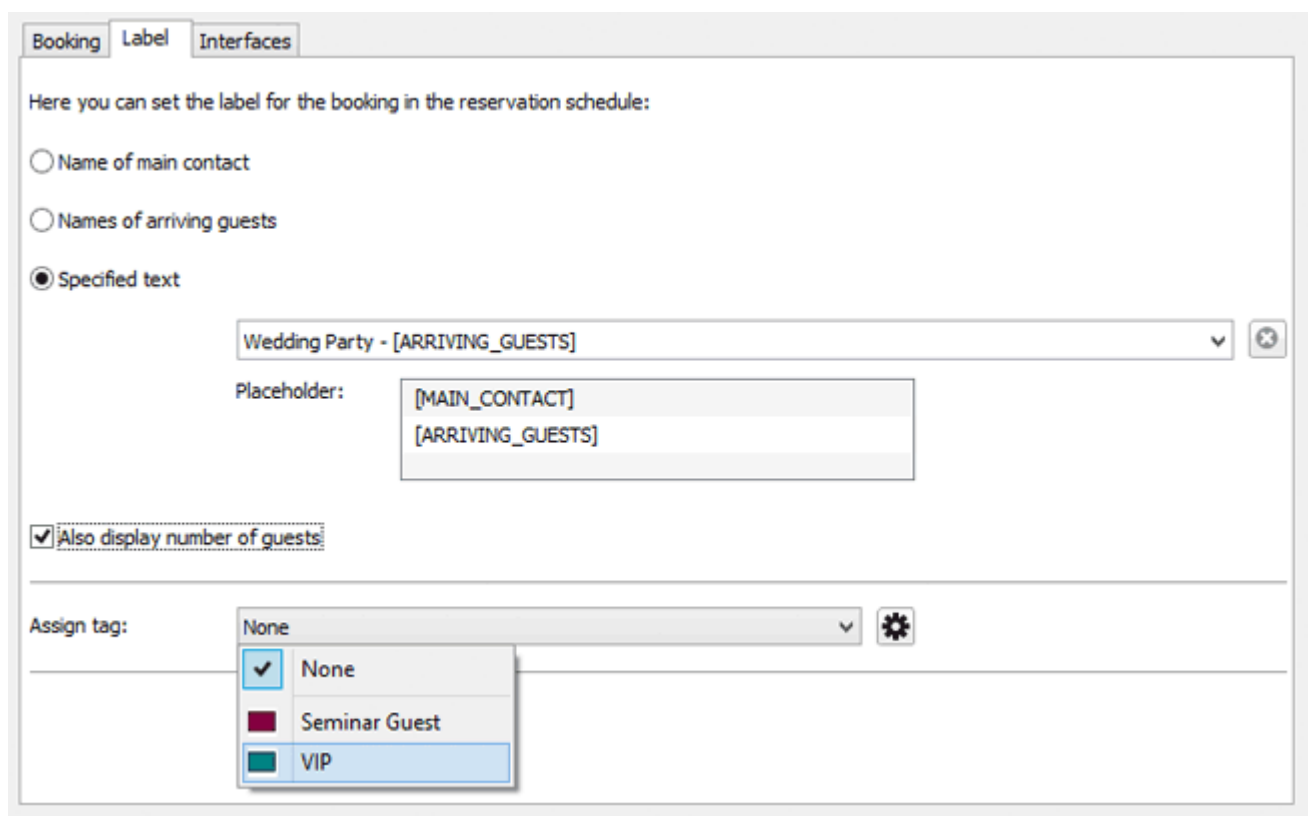
BOOKING LIST   UP   CHANGE TITLE OF A BOOKING IN THE RESERVATION SCHEDULE

Change title of a booking in the reservation schedule

With Lodgit Desk you can decide, what should be displayed on bookings in the reservation schedule. You can either display the name of the main contact, those of the arriving guests or a specified texts.

To edit the label of a booking do the following:

1. Select the booking you want to edit in the reservation schedule und double-click on it. This will open the **booking window**.

2. In the booking window, go to the list item **Label**.

3. Now you can select whether to show **the name of the main contact, the names of all arriving guests**, **a specific text** (e.g. Wedding Party) or **a combination of all three**. You can also decide whether or not you want to display the number of guests.

4. You can also assign a previously created tag to the booking. The tag will be displayed as a coloured bar in the booking:

5. If the booking belongs to a group reservation, you can press the button **Use for all group members** in order to use this new label for all the bookings within this group reservation.

OVERBOOKINGS   UP   EDIT PREFERENCES

Edit the Preferences

Here you find the description of these Lodgit Desk Preferences:

Edit functions of the reservation schedule
Edit booking defaults for the reservation schedule
Preferences for tax rates
 ○ QuickCorrect: edit tax rates in existing bookings
City or Accommodation Tax
Payment Methods
Currency
Numberings for invoices, offers and confirmations
Guest Preferences
Emails
Print options
Preferences for Letter Layout
Sender address
Define country address formats
Return confirmation
Deposit options
Invoicing options
Create database backup
Check for updates
Settings for Proxy server
Accounting Export Options

Edit functions of the reservation schedule

In the **Preferences** under **Reservation Schedule > Colours**, you can edit the colours for the reservation schedule and all booking status.

To edit the colours, double-click on the color field. This will open a window for color definition.
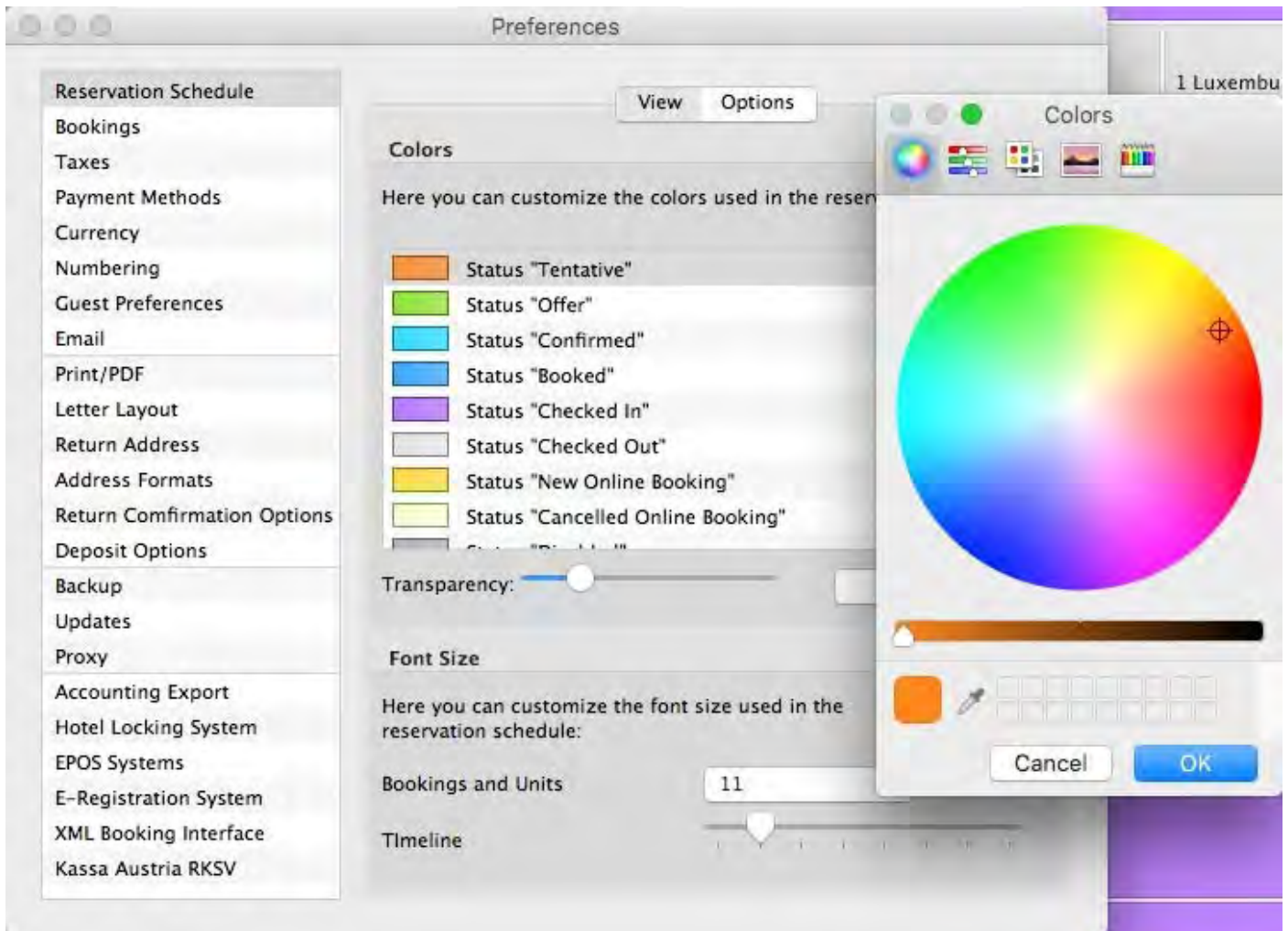
Select a color and then press **OK**.

To reset the standard colours (and transparency value), press **Reset**.

Further options

In the >Options tab you will find setting options for the sidebar, the guest list and the alignment of the reservation schedule.

Sidebar

Here you can also set which guests are displayed in the guest lists in the sidebar.

Turning off these functions can increase the speed of Lodgit Desk. If your software runs slowly and you don't need these features, it can be a good idea to turn them off.

Alignment

Here you can set whether the date you are looking for or "Today" is displayed in the middle or on the left. If you choose the "Links" option, please enter the number of days to the left in the field on the right.
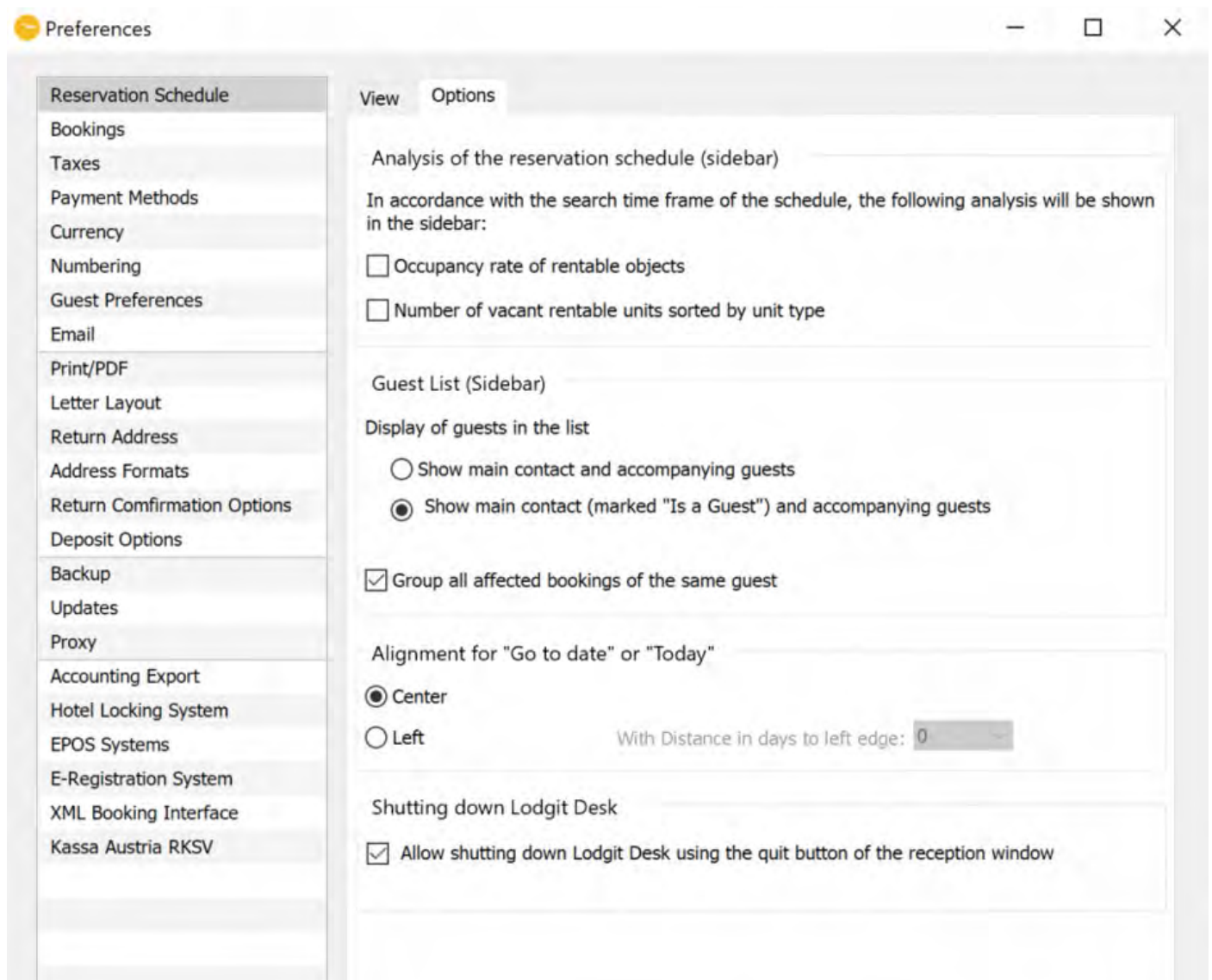
Functions of the booking statuses

Each booking status in Lodgit Desk allows for certain functions to be carried out or not. Some statuses, e.g. Checked Out, will prevent for the booking to be moved by default (see details about booking statuses here). In the **Preferences** you can block some features for other booking statuses as well:

Edit in reservation schedule

Here you can define, which booking statuses allow for the booking to be moved, shortened/extended or deleted.

Status	Move	Resize	Delete
Tentative	✔	✔	✔
Offer	☑	☑	☑
Confirmed	☑	☑	☑
Booked	☐	☐	☐
Checked In	✕	☐	✕

If the box for a function is checked, it can be carried out for the corresponding status. Remove the checkmark, if you want to disallow moving, lengthening/shortening and/or deleting bookings in that status.

Hint:
We recommend blocking certain functions for booking statuses if you're afraid that you or your staff may accidentally change a booking through clicking and dragging.

EDIT PREFERENCES   UP   EDIT BOOKING DEFAULTS FOR THE RESERVATION SCHEDULE
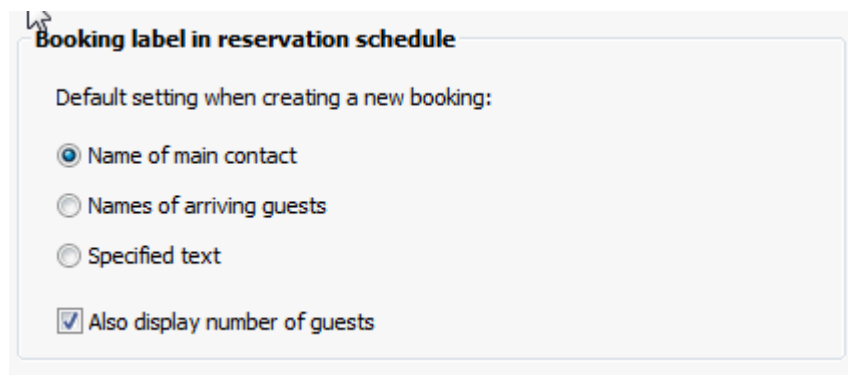
Edit booking defaults for the reservation schedule

Go to **Preferences > Bookings** to define the default booking label as well as the status for duplicated bookings.

Display > Booking labels

You can decide what the default label for new bookings should be:

You have the option to show the name of the main contact, the names of the arriving guests or a certain text as booking label. The specified texts can be added to a booking by adding them in the booking window under "Label". Additionally, you can decide if you want to show the number of guests in the booking.

Display > Tags

Lodgit Desk allows you to create colour tags that you can use to mark certain bookings in the reservation schedule:
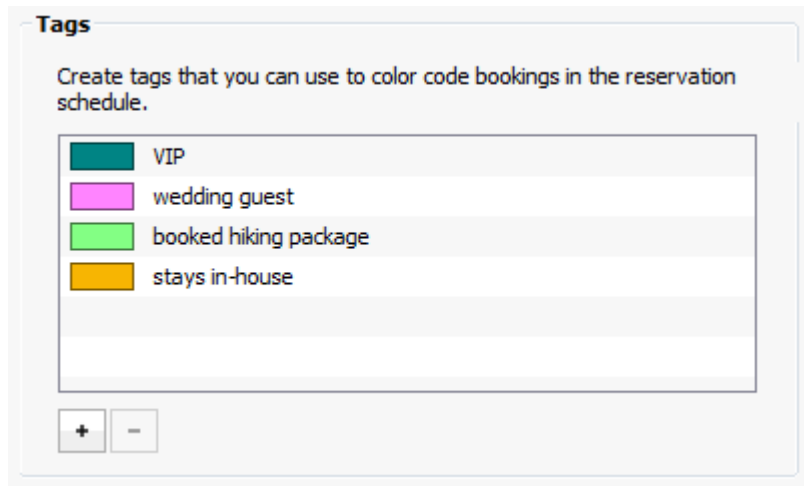
Click on the [+] symbol to create a new tag. Select a tag and press [−] to delete it. Double-click on a colour field to adjust the colour to your liking.

You can add a tag to a booking within the booking window.

Options > Saving unsaved changes

Changes you make to a booking in the booking window will be saved automatically on some occasions.

If you do not want this to happen but prefer having the possibility to confirm or discard those changes in an additional window, please untick the respective boxes.

Options > Overbookings - Marker in booking window

If bookings in the same rentable unit overlap a marker "overbooking" will be shown in the respective booking windows. Here you can exclude some booking status from rendering a booking an overbooking by unticking the box for the status. E.g. if you untick "Tentative" a tentative booking overlapping any other booking will no longer produce "overbooking" message.

Overbooking – marker in booking window

If bookings in the same rentable unit overlap, the marker "overbooking" will be shown in the booking window.

Status	Consider
Tentative	☑
Offer	☑
Confirmed	☑
Booked	☑
Checked In	☑
Checked Out	☑
New Online Booking	☑
Cancelled Online Booking	☐
Disabled	☐
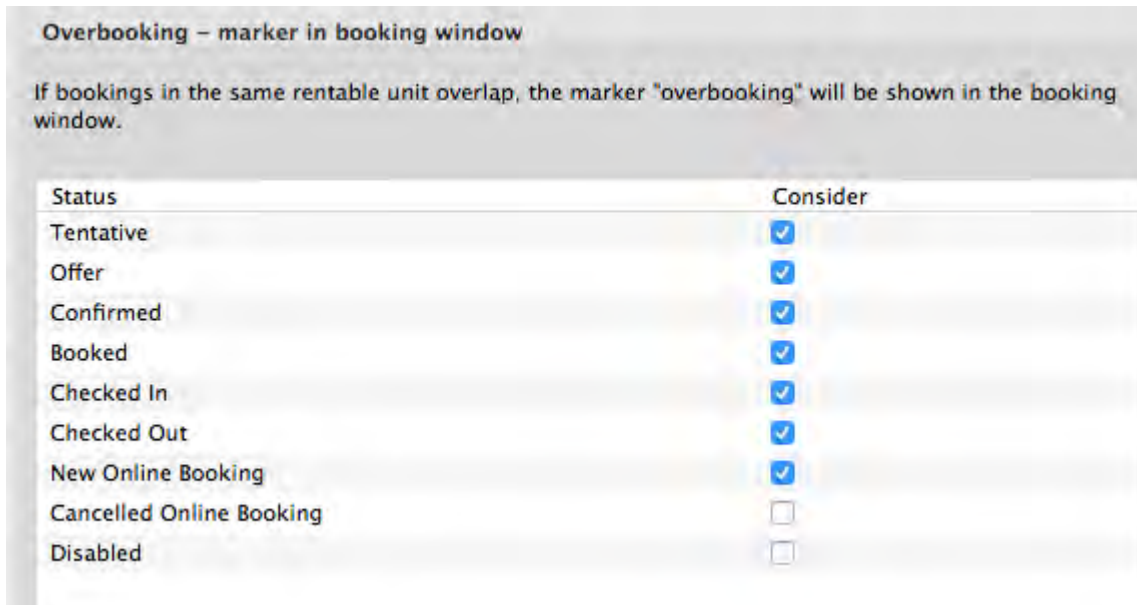
Editing > Edit

Generally most bookings can be freely changed and moved around in the reservation schedule of Lodgit Desk - e.g. moved to a different rentable unit or to a different timeframe. They can by default also be shortened or extended via drag and drop and of course deleted.

While this is always possible for bookings with the "Tentative" status you can disable or limit these possibilities for other status.

If you for example untick all boxes (in the move, resize and delete column) of the "Booked" row you will no longer be able to move, extend or shorten and delete bookings having the "Booked" status.

If you do have to make such changes to a "Booked" booking you will have to change it's status to one that allows the respective changes (e.g. "Tentative")

Editing > Status of duplicated bookings

Here, you can also decide which status any duplicated booking will receive by default:

Duplicating bookings

Please select the status for the new booking:

Status of the original booking ▾

Status of the original booking

⚠ 🟧 Tentative

🟩 Offer

🟦 Confirmed

🟦 Booked

⬜ Disabled

guest number or
ative", the room rate
ct or Price
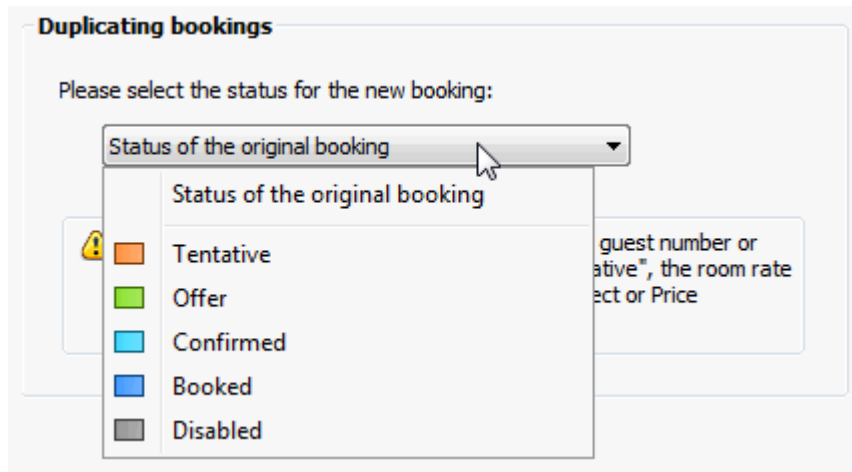
Important:
Bookings with the status "Tentative" will reload the data from the Price and/or Object Management whenever you make changes to the booking dates, main contact or rentable unit. If you often customise the prices based on your customers, select a different default status here (or your customised prices will be lost as soon as you move the booking around).

Editing > Splitting bookings

When splitting a booking, Accommodation costs, extra items and accommodation taxes will be split up according to the new timeframes. This can happen in two different ways:

Standard Mode: Accommodation costs using the price units "flat fee", "per year" or "per month" will be set to 0 in the separated part of the booking. All extra items remain with the first booking part if the price units "per week", "per month" and "per year" were used. The accommodation tax will not be transferred to the second booking part when using the price units "per person" or "per stay".
This setting can lead to a decreased price of the entire booking.

Special Mode: Accommodation costs, acc. taxes and extra items will be split according to the new timeframes and will always be transferred to the second booking.
This setting can lead to an increased price of the entire booking.

Price/Discount > Settings for prices in price management

If a booking goes across multiple pricing timeframes (i.e. if multiple prices from price management are applicable) the entire booking timeframe will by default be split and the respective prices will be applied.

Example: The base price of a rentable unit is 50€/night. In price management you also defined the timeframe between Oct 5 until Nov 5 to cost 60€/night instead.

A booking from the 1st until the 10th October would usually be split up - the first nights costing 50€ and the last nights after the 5th Oct will cost 60€. So all prices

will be applied as they were defined.

If you tick this box ("Price on check in day is valid for the entire booking duration") every night of the aforementioned booking will cost 50€. So the price of the first night will be applied to the entire booking duration.

Booking discount > Adding/Changing the main contact

If you change the main contact of a booking (of if you change the guest discount of the current main contact and add it to the booking again) Lodgit Desk by default only checks the guest discount again for bookings in the "Tentative" status and alters the booking discount if necessary.

If you would like this to happen for bookings with other status as well please tick the respective boxes.
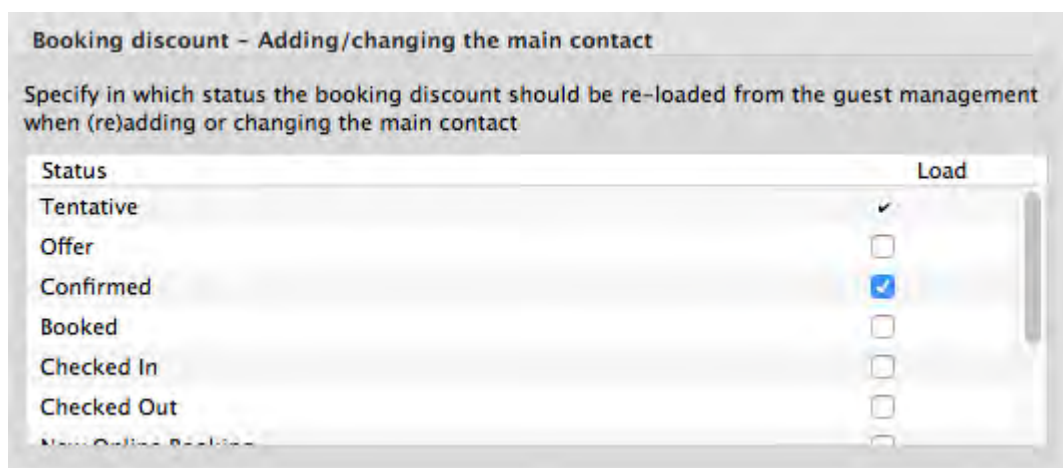
Booking discount > Changing group membership

Here you can specify which guest discount should be used by Lodgit Desk when a single booking is added to or removed again from a group booking. This can be specified individually for each booking status.

If you add a single booking to a group Lodgit Desk can...

- not change the single booking's discount at all (Don't change)
- make the single booking inherit the discount of the main contact of the group booking (Main contact)
- make the single booking inherit the booking discount of the main booking of the group (Main booking)

If you remove a booking from a group Lodgit Desk can...

- not change the single booking's discount at all (Don't change)
- re-load the guest discount of the original main contact (Main contact)

Booking discount – Changing group membership

Specify in which status the booking discount should be updated when changing group membership and which source to use

Status	Add		Remove	
Tentative	Main booking	▼	Don't change	▼
Offer	Don't change	▼	Don't change	▼
Confirmed	Main booking	▼	Main contact	▼
Booked	Don't change	▼	Don't change	▼
Checked In	Don't change	▼	Don't change	▼
Checked Out	Don't change	▼	Don't change	▼
New Online Booking	Don't change	▼	Don't change	▼
Cancelled Online Booking	Don't change	▼	Don't change	▼
Disabled	Don't change	▼	Don't change	▼

EDIT FUNCTIONS OF THE RESERVATION SCHEDULE   UP   PREFERENCES FOR TAX RATES

Preferences for tax rates

Go to the item **Tax** in the **Preferences**.

You can **add new tax rates** by clicking on the plus symbol.
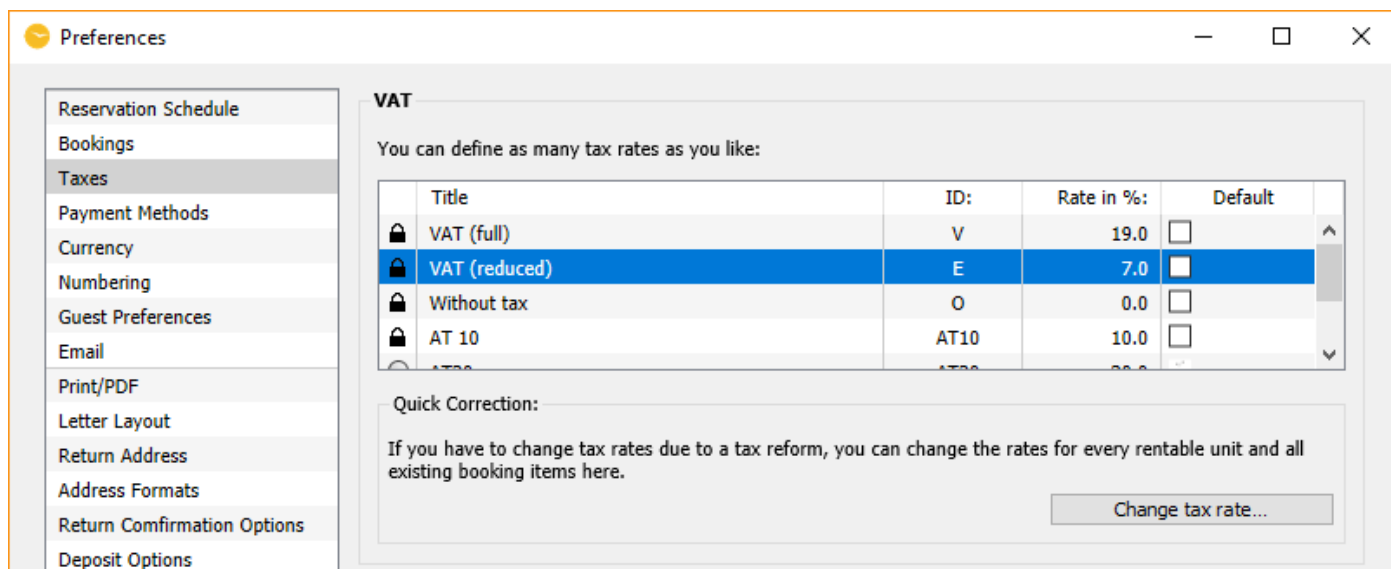
You can make on of these tax rates the default rate using the checkbox on the far right.

Double-click on the tax rate to **edit its information**.

Click on the minus symbol next to a tax rate to **delete it**.

You cannot delete a tax rate that is still being used in rentable units or extras.

QuickCorrect

If you have to change the tax rates of already existing bookings because of a tax reform, you can use the QuickCorrect feature of Lodgit Desk by pressing the button Change tax rate....

QuickCorrect: edit tax rates in existing bookings

Lodgit Desk can help you to easily change the tax rate of your lodging services in all rentable units, open bookings or even added extras to a different rate (e.g. change it from the full to the reduced tax rate).

1. Open the program preferences for Lodgit Desk.
2. Go to "Tax" and make sure that the new tax rate already exists. If it doesn't, you can create it by clicking the plus symbol.
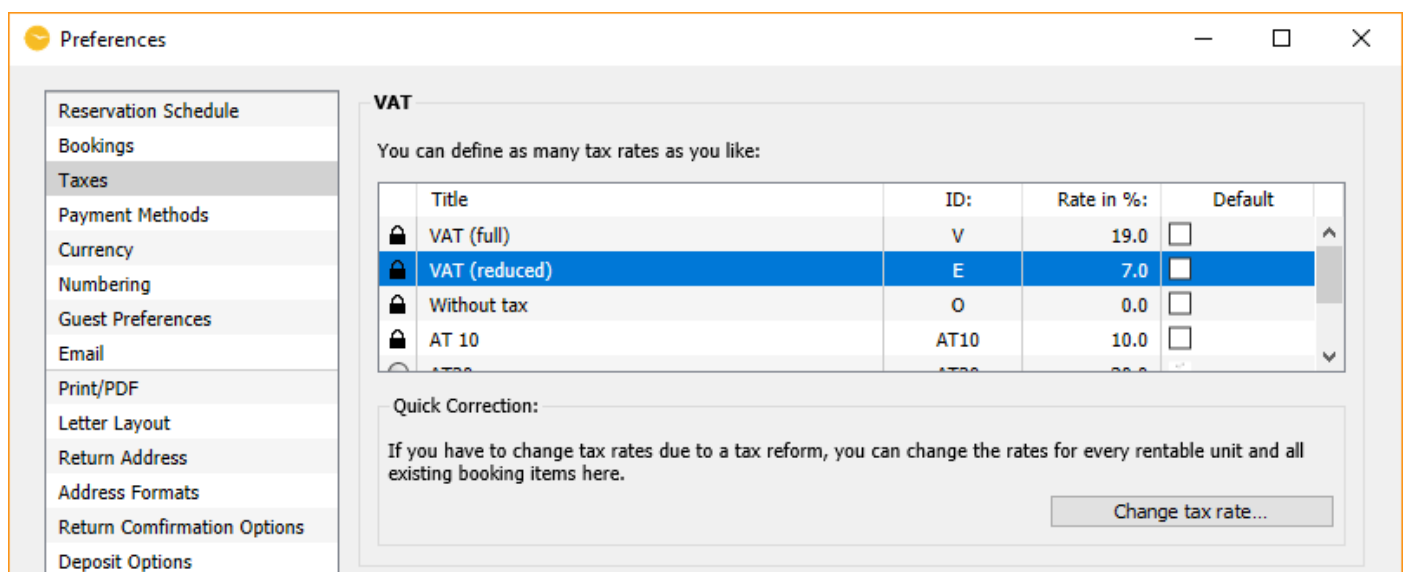
3. Press the button "Change tax rate...". This will open the new window "Change Tax Rates".

Change the tax rate in the object preferences of all existing rentable units automatically

1. Go to "Rentable Units" in the window "Change tax Rates".
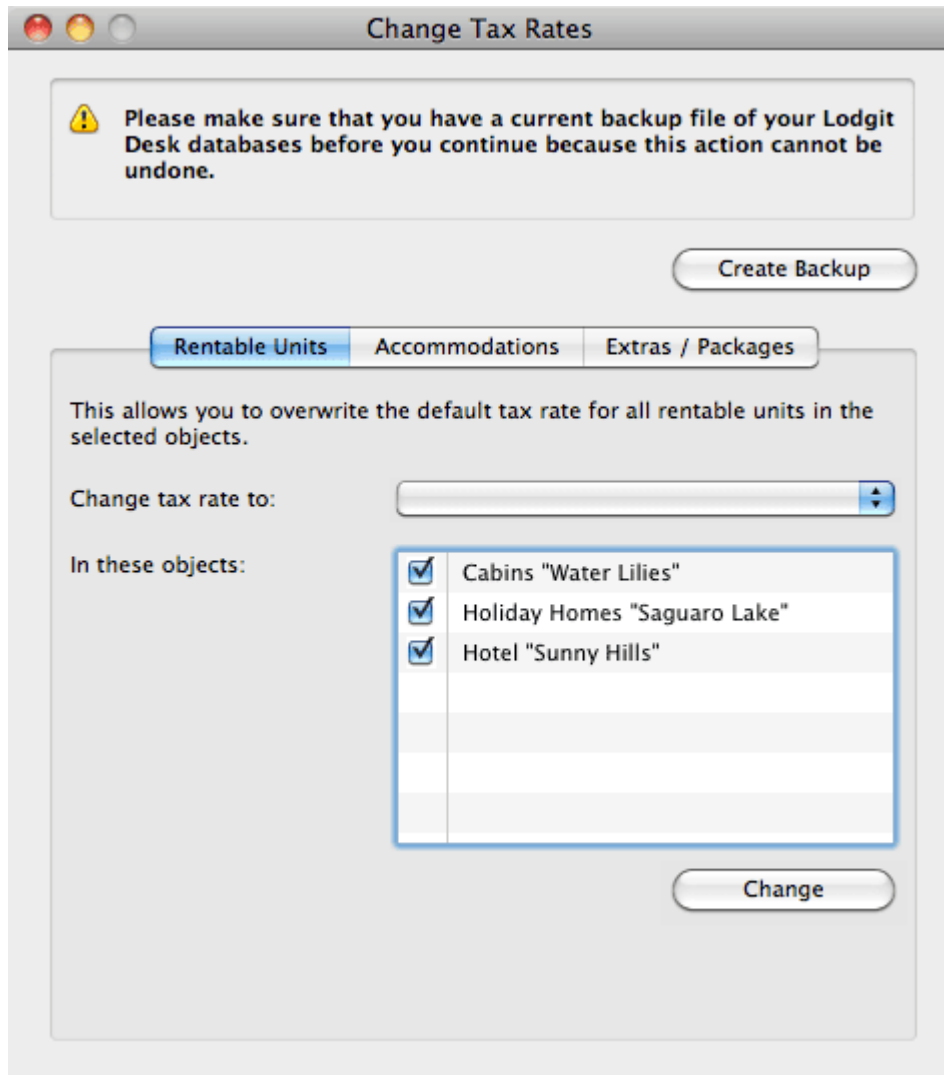
2. Select the tax rate that you want to use in the future, make sure that all objects you want to change the rate in are selected and then press the button "Change".

All future bookings that you will create in Lodgit Desk will be using the new tax rate automatically.

Change tax rate in lodging services for all open bookings

1. Go to "Accommodations" in the window "Change Tax Rates".
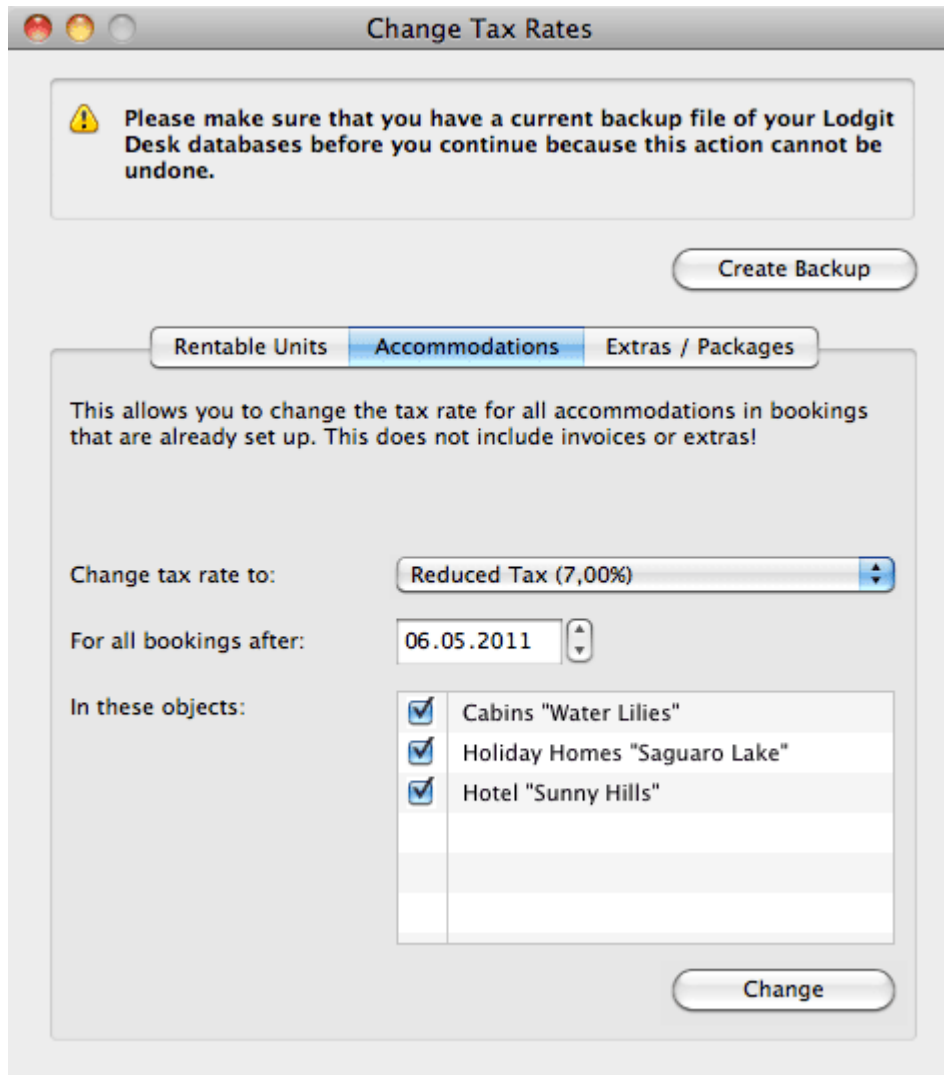
2. Select the new tax rate, enter the starting date for using the new rate (e.g. 30.06.2020) and make sure that all objects that you want to change the rates in are selected. Then, press the button "Change".

Change tax rates in extras already added to bookings

Changing the tax rates for extras that have already been added to bookings and packages has been integrated into the Extras Management.

- Go to: Update extras in existing bookings
- Go to: Update extras in existing packages

Note:
Catering services such as breakfast, half-board etc. can be added as extras and still use the full tax rate.

Tip:
With Lodgit Desk, you also have the option to link an extra to a rentable unit, so that it is automatically added to each booking in said unit.

PREFERENCES FOR TAX RATES   UP   CITY OR ACCOMMODATION TAX

City / Accommodation Tax

Some cities and communities charge a special city/accommodation tax that is due for each tourist. Lodgit Desk offers a general setting for those.

Go to **Preferences** (Edit > Preferences on a Windows and Lodgit Desk > Preferences on a Mac) and then go to the tab **Tax**.

First, you'll have to **activate** the function by checking the box at the top. Then, you can set up the tax for your property:

1. Select the amount of the tax. You can choose from a **percentage amount from the gross or net accommodation price** or a **set amount per person, day, night or person/night or person/day.**

2. Select the method for calculating the accommodation tax. Please therefore use the examples for the correct calculation published by your municipal administration. You can choose between the following methods:

   Added to the lodging rate
   The percentage of the accommodation tax is calculated from the lodging rate. It is added to the end price of the lodging rate.

   Included in the lodging rate
   The accommodation tax is already included in the lodging rate, its percentage amount is discounted from the lodging rate. As the end price for the lodging rate already includes tax accommodation it remains the same.

   Deducted from the lodging rate
   The percentage of the accommodation tax is calculated from the lodging rate and

then deducted. The end-price for the lodging rate and accommodation tax remains the same.

3. If the accommodation tax has some sort of VAT or Sales Tax itself, you can also define this here.

4. Finally, you can decide where the tax should be listed on offers, confirmations and invoices: **beneath the lodging rate it belongs to, underneath the last invoice item, at the end of the invoice** or just **as an explanatory note.**

5. If you want to use the Financial Export, you have to make a note of the correct account here.

> *If you manage more than one object and they have a different city/accommodation tax, you can also set up several taxes.*

You can add the tax manually or automatically to each new booking in a unit.

QUICKCORRECT: EDIT TAX RATES IN EXISTING BOOKINGS   UP   PAYMENT METHODS

Preferences for payment terms and methods

In the **Preferences** under **Payment Methods** you can define the payment terms for each payment method and choose, which payment method is used the most often and will be added to newly created invoices by default.

> *Tip:*
> *If you often have different payment methods for your invoices, there's the option of choosing **None** as the default payment method. For new invoices, you then have to always manually select the payment method.*

Manage payment methods

In the table below the default payment method menu, you can see all payment methods available in Lodgit Desk:

Payment method:

	Title	Type	Time for payment	Active
🔒	Cash		-	☑
🔒	Cash Deposit		-	☑
🔒	Wire Transfer		15	☑
🔒	Credit Card		0	☑
🔒	Credit Card (via H..		0	☑
🔒	EC Cash		6	☑
🔒	Debit		0	☑
🔒	Check		0	☐
🔒	PayPal		0	☐
🔒	Moneybookers		0	☐
⊖	VISA	Credit Card ▾	0	☑
⊕				

[Payment texts in Text Management]

With a click on the "time for payment" field, you can **edit the default payment term** for each method.

You can also **deactivate payment methods** you don't want to use anymore, so they won't clog up the select list in the invoice window.

The plus button in the last table row allows you to **add your own custom payment**

methods. You can use this to differentiate between different cards you accept, for example. Now you can define further settings for your custom payment methods:

- Add the account numbers for the accounting export. See settings
  Important: Default for a new payment method is "0".
- Edit the payment texts in the Text Management.
  Important: Default is the text of the selected "Type".

You can delete a custom payment method by pressing the minus button.

Once a payment method was used for an invoice, it cannot be deleted. But you can block it from further use by unchecking the "Active" box.

Any changes you make to the name or type of payment methods that have already been used will be saved in the GOBD journal.

CITY OR ACCOMMODATION TAX   UP   CURRENCY

Preferences for currency

To select the default currency that will be used in all offers, confirmations, invoices and in the Price Administration, go to the **Preferences** and then to **Currency**.

Please select the currency you want to use:

Currency: Euro, € (EUR)

Below you can define additional currencies (incl. their exchange rates) for displaying the end total on an invoice:

Currency	Exchange rate
⊖ Swedish Krona, kr (SEK) ▼	9,65938
⊕	

[Get latest exchange rates]

Define how the currency will be displayed in the program and when creating a new correspondence item:

🔘 Use the currency symbol €

⚪ Use the currency abbreviation EUR

⚪ Use your own currency symbol

Symbol: [   ]

☑ When creating emails use currency abbreviation

First you'll select your **default currency**. This is the currency in which you enter all the prices and create the invoices.

You can also add **alternative currencies** with their exchange rate. You can use this to optionally display the end total of an invoice in an alternate currency within the invoice texts.

You can also decide how you want to display the currency on documents: using the **currency symbol**, the **currency abbreviation** oder a **customised symbol**.

If you change the currency while actively using Lodgit Desk, only the currency symbol will be switched. The amounts will not be converted! Already existing offers, confirmations and invoices will keep the old currency symbol.
You **cannot change the currency** if there are still **unsaved entries in the**

cashbook. Before you can change the currency, you will have to create a **cashbook balance** with the end total of "0" (you can use the "Withdrawal" option, for example).

PAYMENT METHODS   UP   NUMBERINGS FOR INVOICES, OFFERS AND CONFIRMATIONS

Numbering for invoices, offers and confirmations

You can add different numberings for offers, confirmations and invoices in the **Preferences** under **Numbering**. If need be, you can add a numbering to an object in the Object Management!

If you have several objects (e.g. one hotel, one guesthouse and several holiday homes), you can add a different numbering for each object.

The numbering for invoices can be set right on the first page.
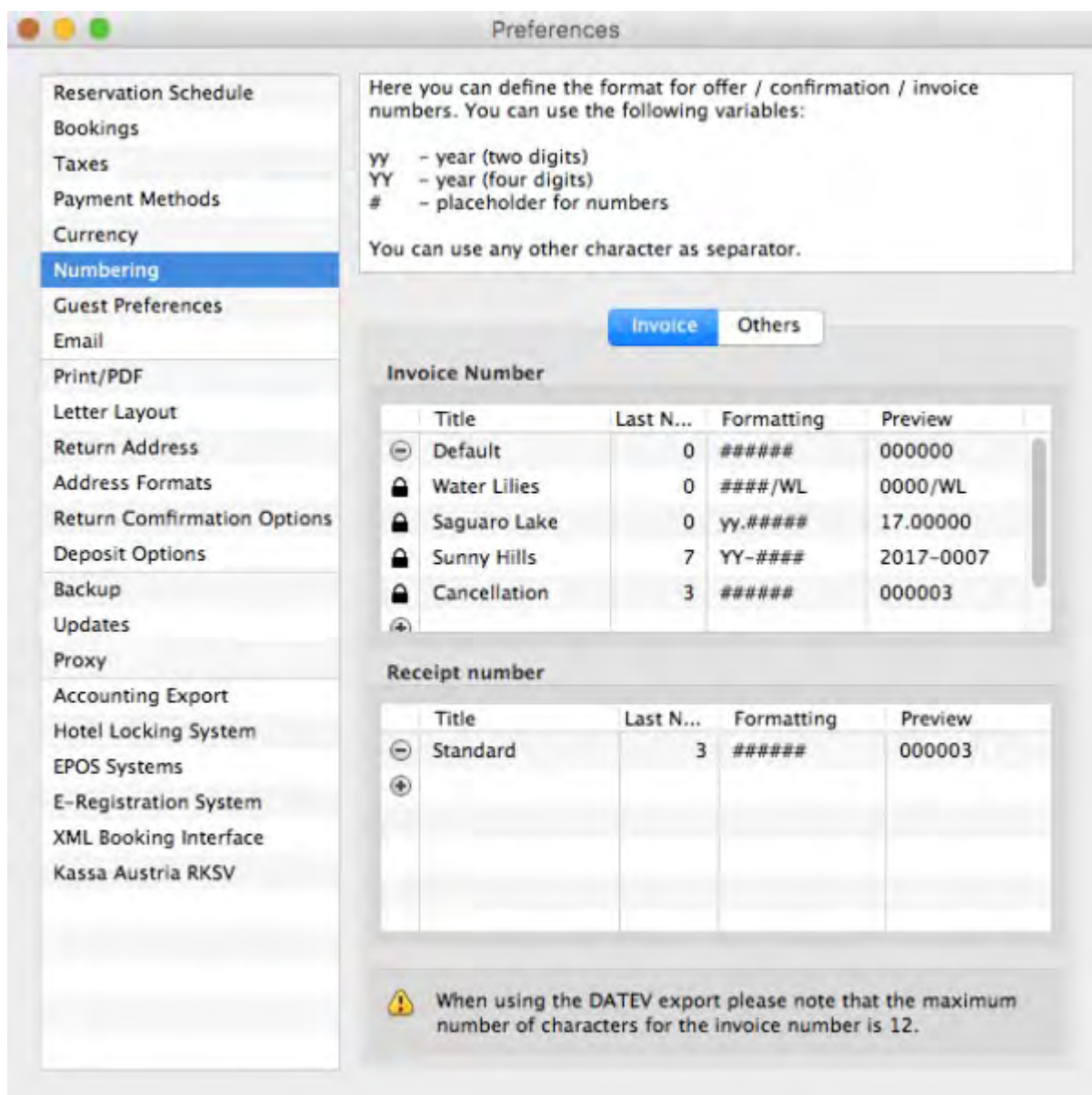
In order to modify the numbering of offers and confirmations, simply click on "Others"
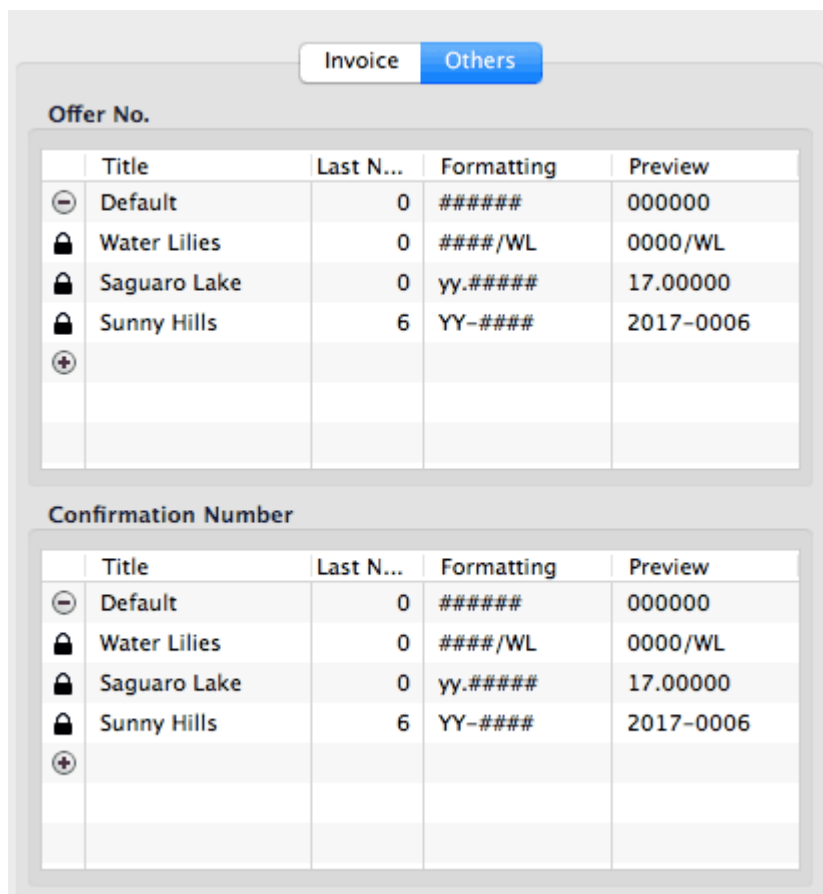
To edit the format of the offer, confirmation and invoice numbering, you have several placeholders at your disposal:

yy - year (two digits)
YY - year (four digits)
 # - placeholder for numbers

You can use any other character as a separator.

Ex.:

YY - ####### - 2005 - 0021501
#######/yy   - 0021501/05

When you create a new piece of correspondence, the number will automatically be counted upwards. If you want to start over every year, you can manually edit the number on Jan 1st by double clicking on it and resetting it to 0.

> **Note:**
> *As a new Lodgit Desk user you can, of course, keep your old numbering system. Since you can also edit the last number freely (double-click on the number to edit it), you can also start using Lodgit Desk in the middle of a year without having to worry about your invoice/confirmation/offer numbers.*

CURRENCY   UP   GUEST PREFERENCES

Guest Preferences

Birthday reminders

In **Preferences,** under **Guest Preferences,** you can decide whether and when you want to be reminded of guests' birthdays.

If you have activated the feature **Pop up birthday reminders automatically**, you have four options for the reminder:

- on the birthday
- a day before
- two days before
- three days before

You can also limit birthday reminders to guests whose bookings are fairly recent and ignore those whose bookings are too far in the past. Or just limit it to guests currently checked in.

If you go to **Administration > Birthdays**, you can also manually ask for the birthday reminder.

This is what a birthday reminder looks like:
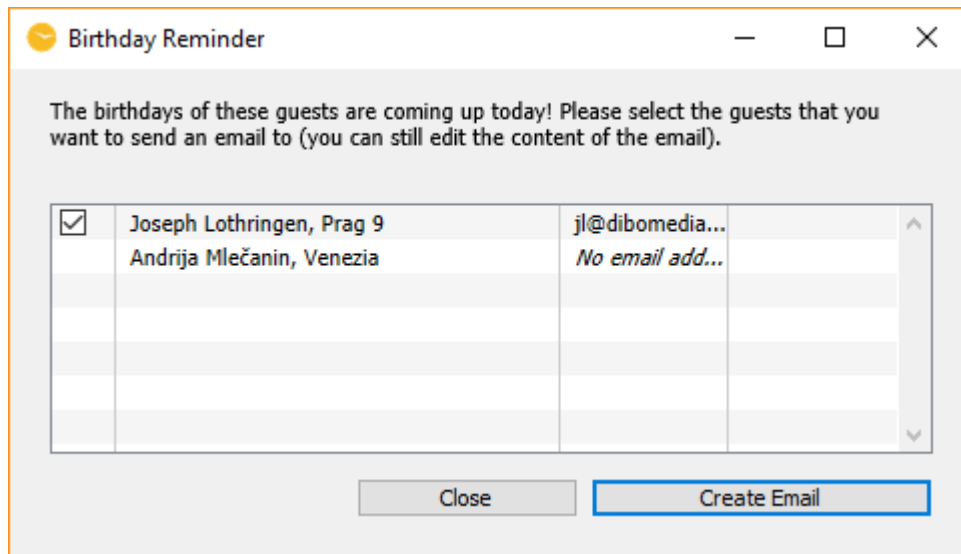
Set preferences for regulars

In the **Preferences** under **Guest Preferences** you can decide after how many bookings a guest is considered to be a regular.

To edit the number of bookings required, click into the field to change the number.

> *If you want to make a guest a regular, you can edit the number of bookings in the guest profile of the guest in the Guest Management. This number will be used and added to by Lodgit Desk in case of new bookings, no matter whether you have altered the number or not.*

Guests who are regulars will be shown with the ✳ symbol in the current guest list.

> **Tip:** If you don't want to use the **regular guest feature**, you can simply edit the required number of bookings to an unachievable amount (e.g. 1000)

Guest defaults
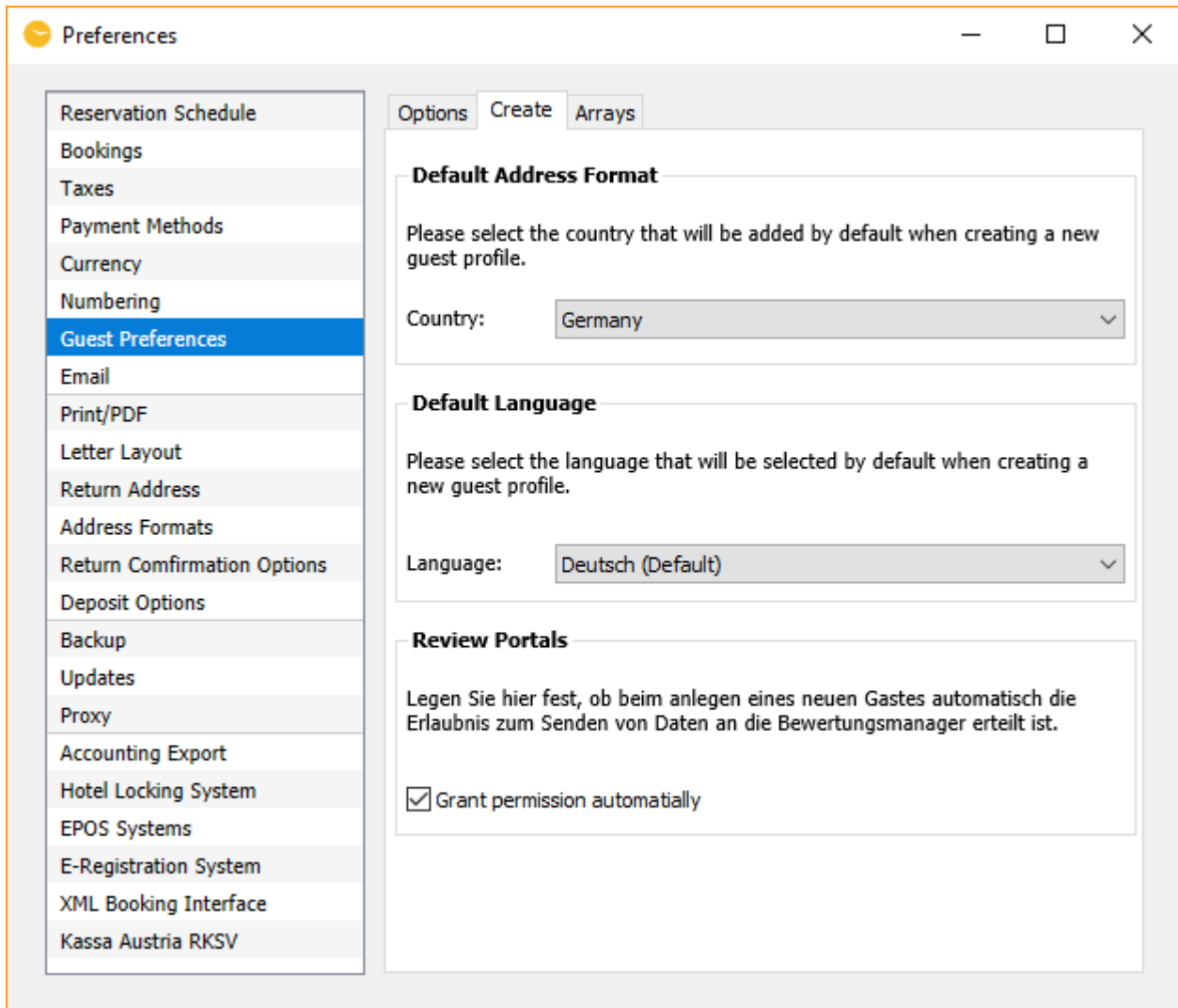
This will let you define the default country and the default language that will be added when you create a new guest profile.

You can also specify whether the approval to transfer data to the valuation manager should automatically be considered granted.

Emails

In the **Preferences** under **Email** you can decide, whether you want to send emails created in Lodgit Desk with your usual email program or send them directly via Lodgit Desk.

Using your standard email program

The default setting is for you to use your standard email program.
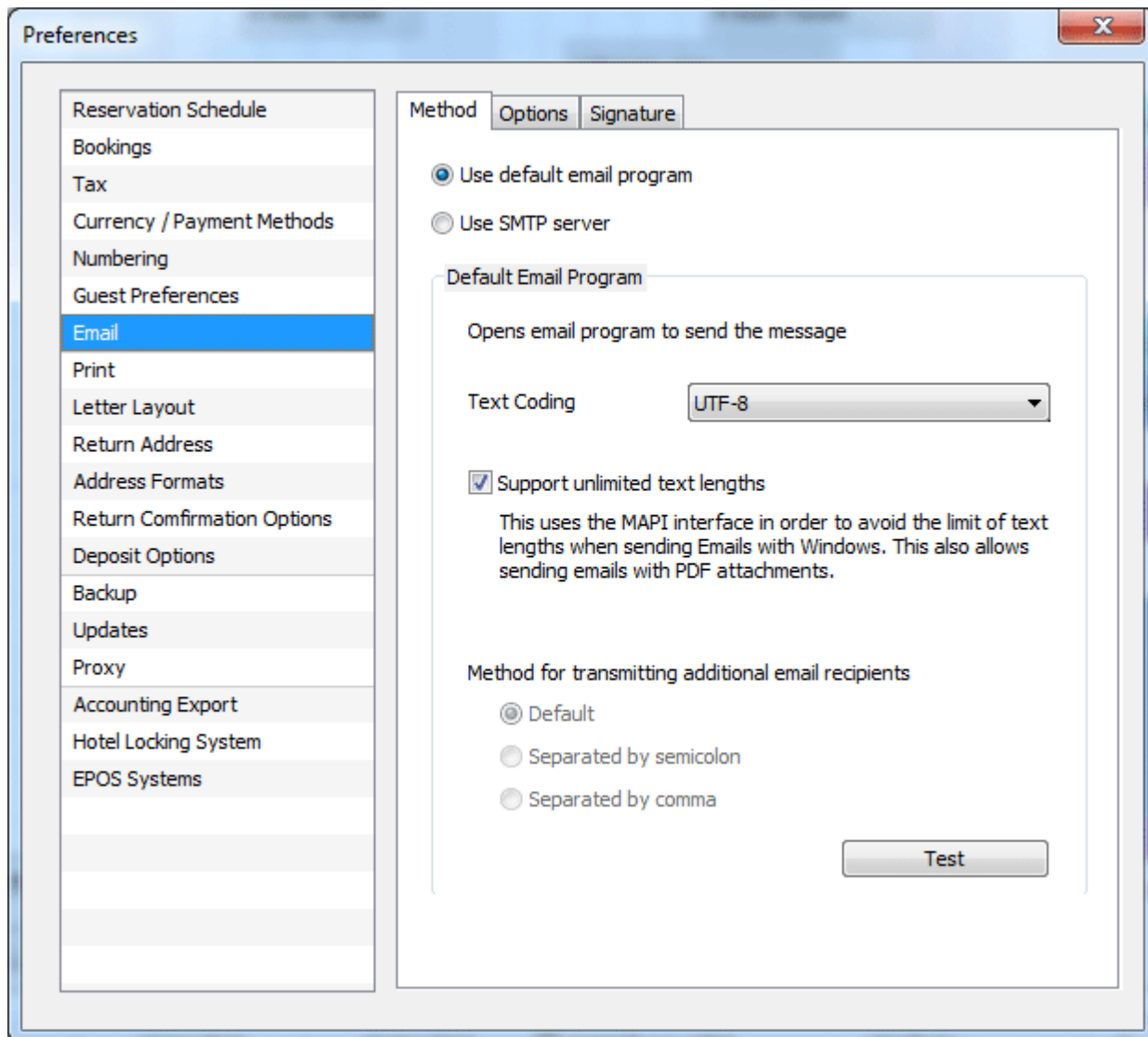
Depending on which standard email program you're using, it could be helpful to edit the settings for this option. If your standard program is **Mozilla "Thunderbird"**, for example, you should always use the **"UTF-8" encoding**.

Note for Windows users:
The default email program that comes with your Windows operating system does not have the MAPI interface necessary for communicating with Lodgit Desk.
To ensure that your email program can properly receive the emails from Lodgit

Desk, please check **"Support unlimited text lengths"**.

Settings for unlimited text lengths under Windows

1) Under Windows you define whether the MAPI interface should be used for text transfer between **Lodgit Desk** and your standard e-mail program.

Option 1) If the checkbox is not activated, mails are sent via the MailTo protocol. The character length is limited when transferring to the mail program and the additional transfer of pdf files as mail attachments is not possible.

Option 2) To avoid the text length limitation and to transfer attachments such as pdf files to the e-mail program, activate the MAPI interface by ticking the checkbox.
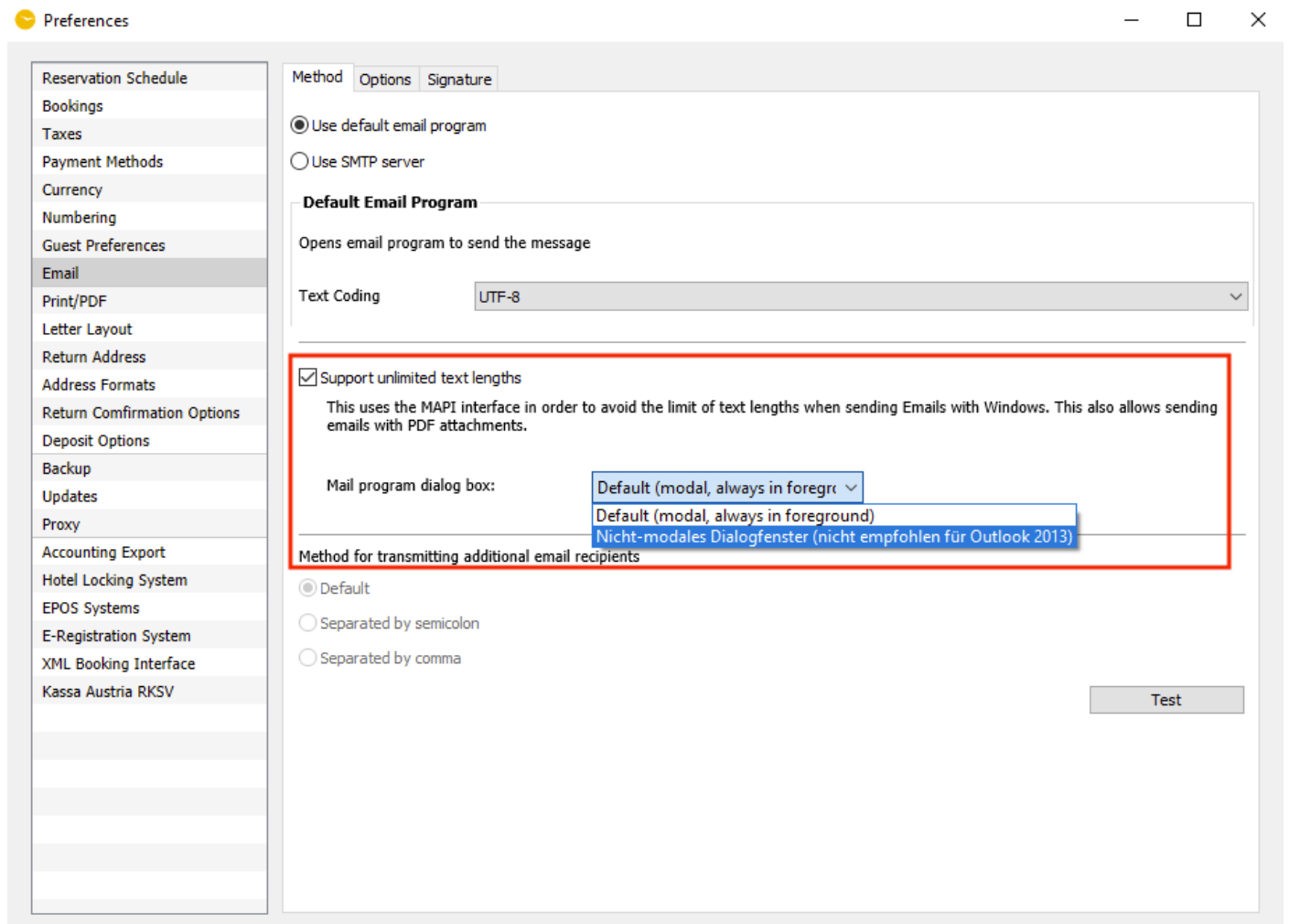
2) Then specify in the drop-down list how the e-mail program dialog box is to be opened.

Option 1) "Standard (modal, always in foreground)": The e-mail dialog window will always be in the foreground and the program windows of Lodgit Desk will be blocked.

Option 2) "Nicht-modales Dialogfenster": With this option the e-mail dialog box can be moved to the background so that you can continue working in Lodgit Desk without first closing the e-mail dialog box or sending the e-mail.

Please note: Option 2 is not suitable for using Lodgit Desk on Windows with the

> default e-mail program Outlook 2013.

Settings for macOS

When using Lodgit Desk on a Macintosh computer, you will have to enter additional information about your default email program and the sender address:
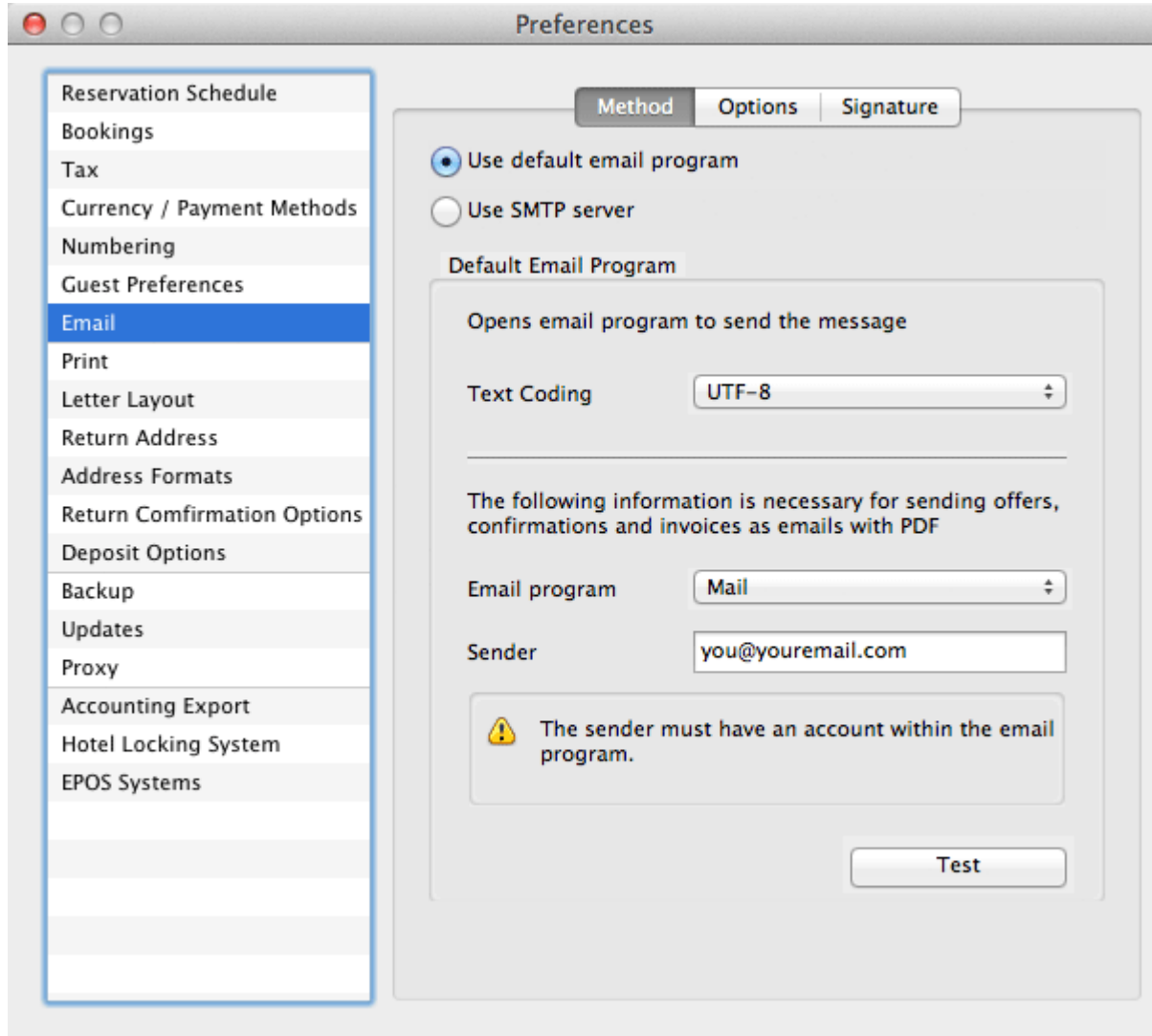
Specifics under macOS Mojave and Apple Mail

When you send an email with a PDF attachment from Lodgit Desk via Apple Mail under macOS Mojave for the first time, a dialog window for access permissions is displayed:
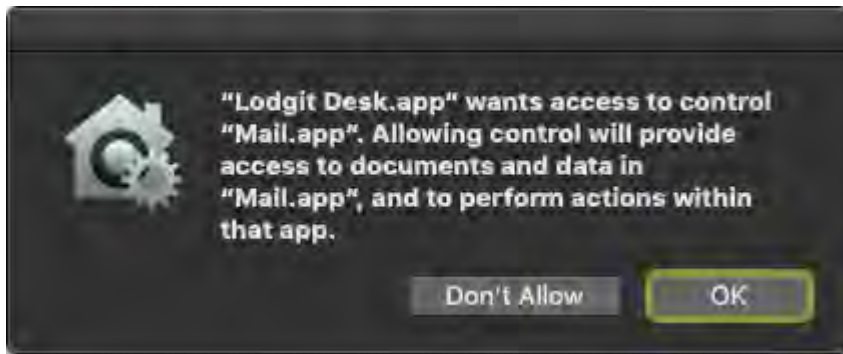
You need to agree to this with "Ok".

> Please note: The dialog appears only once. If the permission has not been given via the dialog box, it has to be set up manually.

Setting up permissions manually under macOS Mojave

1) Open the System Preferences > Privacy & Security > tab "Privacy". Select "Automation" from the menu bar on the left.

2) Under the program item "Lodgit Desk.app" you will find the linked application "Mail.app". A checkmark must be set here.

Sending emails via SMTP server

If you want to use the option to send your emails directly via Lodgit Desk, check the box that says **Use SMTP server** and enter the required data.
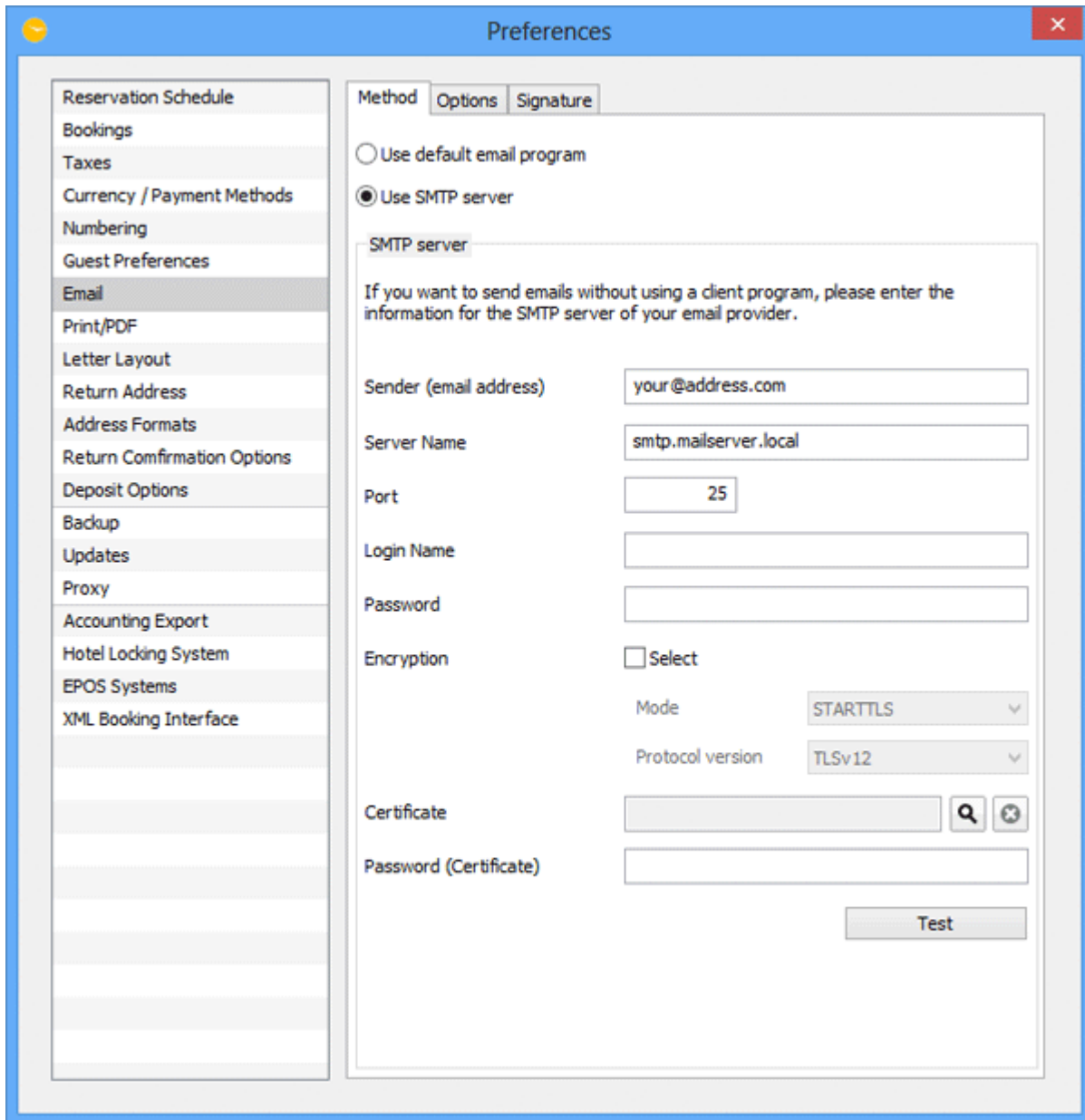
Press the **Test** button to send a dummy email to the account you have entered. Should the information you have entered be incorrect, an error message will appear.

Note for Windows users: The Windows Firewall blocks the necessary ports by default if no email program was previously configured.

Options

Under "Options" you'll find more settings as to what is automatically put into the email body when sending emails via Lodgit Desk:
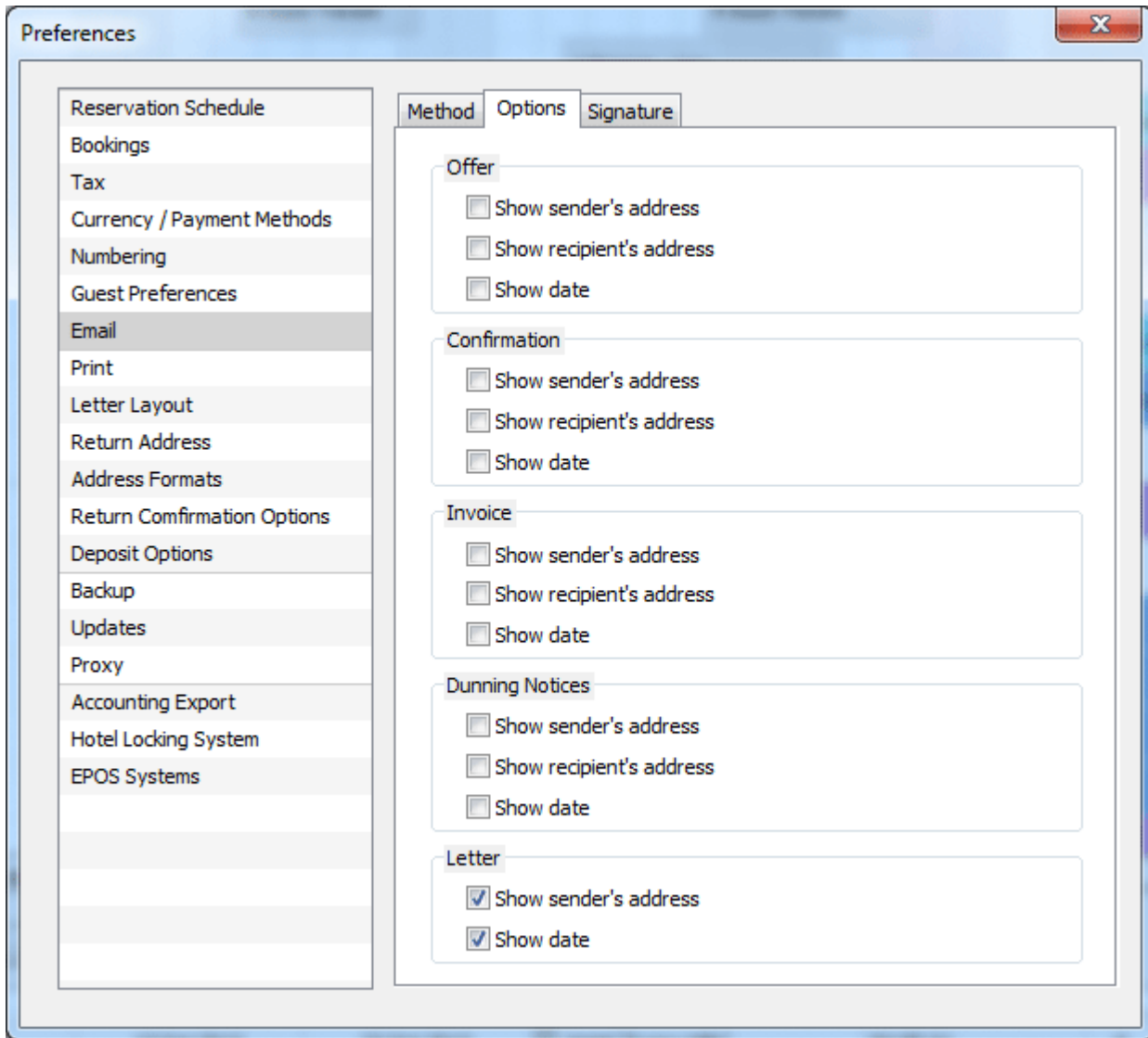
Here you can decide whether you want to show the date as well as sender's and/or recipient's address when creating new emails.

Signature

Here you can set a signature for your emails. **Please note that these settings are NOT object specific!**

Preferences

Reservation Schedule
Bookings
Tax
Currency / Payment Methods
Numbering
Guest Preferences
Email
Print
Letter Layout
Return Address
Address Formats
Return Comfirmation Options
Deposit Options
Backup
Updates
Proxy
Accounting Export
Hotel Locking System
EPOS Systems

Method | Options | Signature

☑ Use signature

Signature

Cabins "Water Lilies"
Holiday Homes "Saguaro Lake"
Hotel "Sunny Hills"

Awake refreshed.

GUEST PREFERENCES   UP   PRINT OPTIONS

Print and PDF Options

In the **Preferences** (Lodgit Desk > Settings...) under **Print/PDF** you can define the basic settings for printing.

You can define here, how large the site margins will be as well as what font and which font size to use.
By default, the left margin is slightly wider than the right margin.
For the second page, you can optionally specify an additional distance between the header and the content.
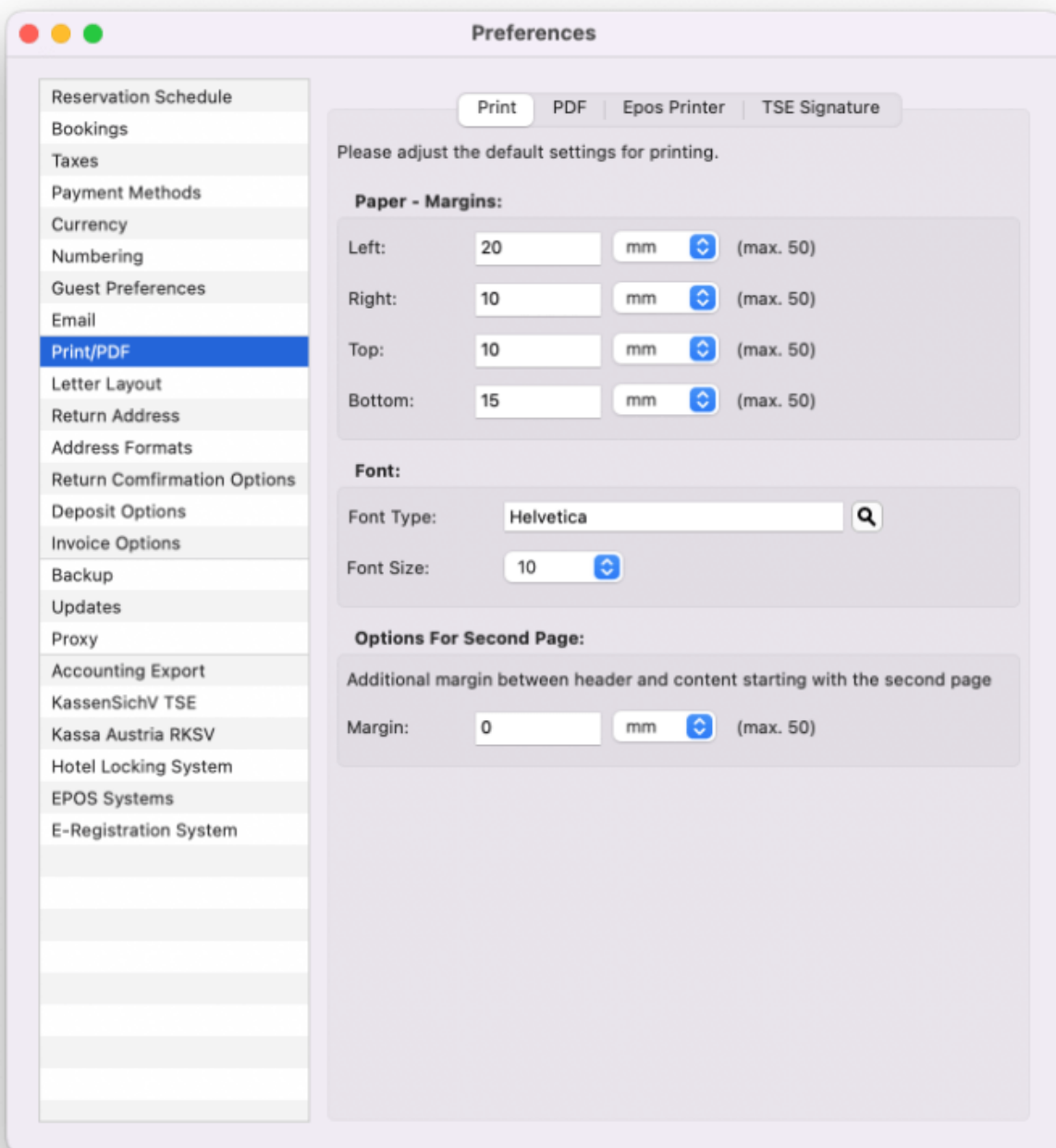
PDF documents

Here you can specify the default folder in which PDF files created with Lodgit Desk should be saved on your computer. You can also choose the text encoding which will be used. Depending on your choice of font this may need to be changed.

> For OpenTypeFonts select the text coding "cpUnicode". For standard fonts, please use "UTF-8" by default.
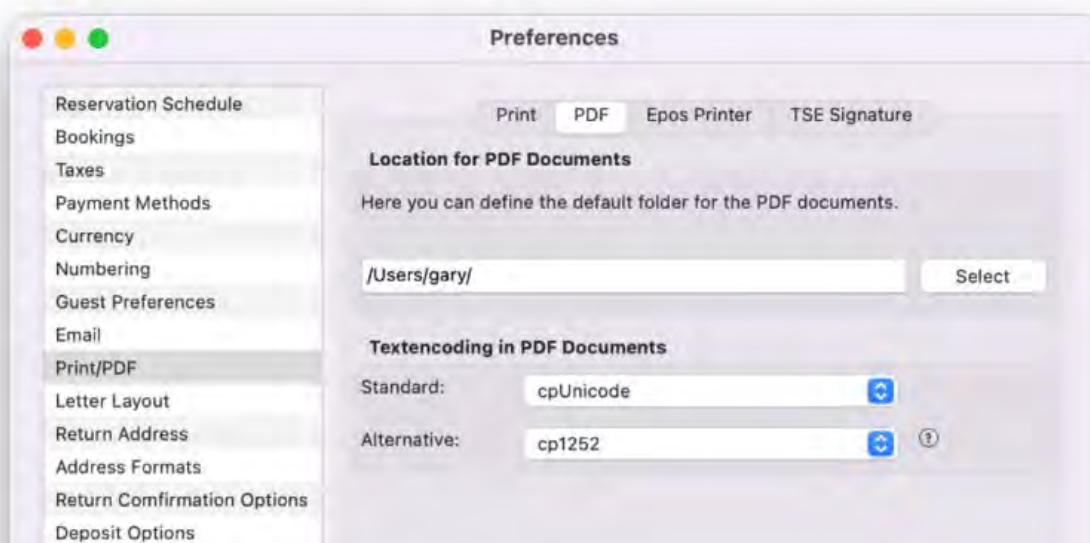
EPOS / receipt printer

To set up the receipt printer, enter its IP address and port. For Epson printers, this is 8009 by default. After entering the data, click on "Test connection". If the data was entered correctly and a connection can be established, a confirmation message is displayed. Otherwise, an error message appears and the data must be checked.

> Currently, only Epson printers with a roll width of 80 mm are supported.
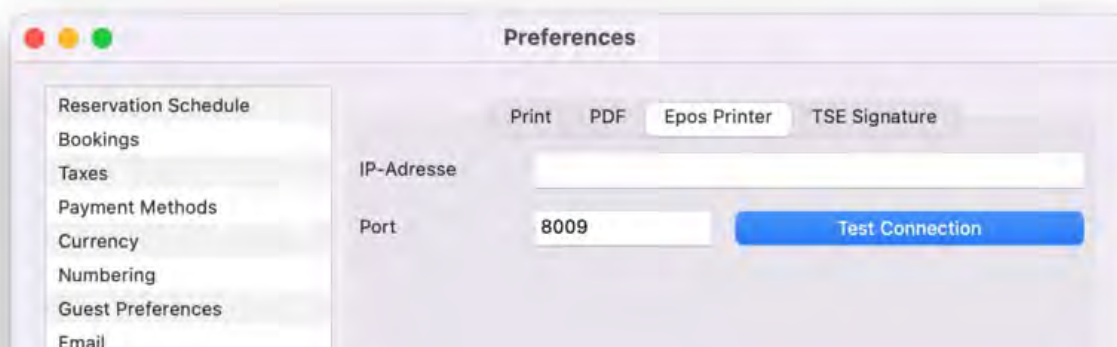
TSE signature (for invoices in Germany)

Specify here whether you want only the QR code of the German TSE fiscalisation signature to be printed on invoices or the complete signature including the text part. You can also set the desired size of the QR code.

Printing only a small QR code is the most inconspicuous way to place the TSE signature on your invoice.
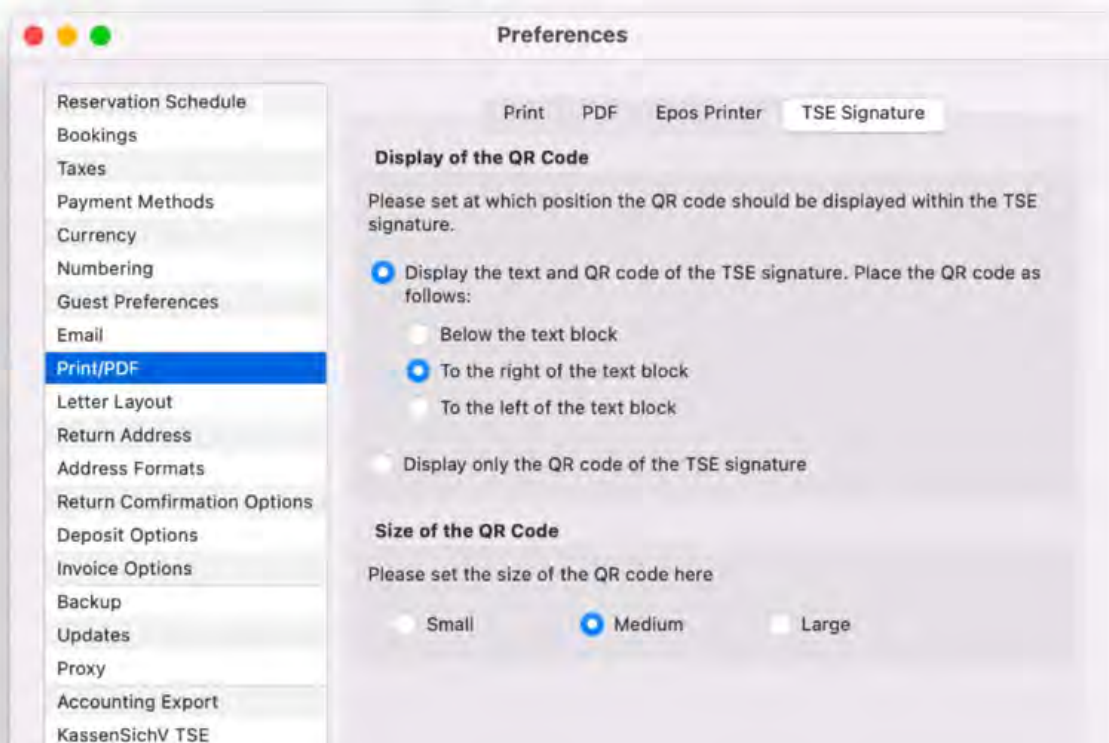
EMAILS   UP   PREFERENCES FOR LETTER LAYOUT

Preferences for letter layout

In the **Preferences** under **Letter Layout** you can select what kind of stationary you will use:

- blank paper
- pre-printed stationary
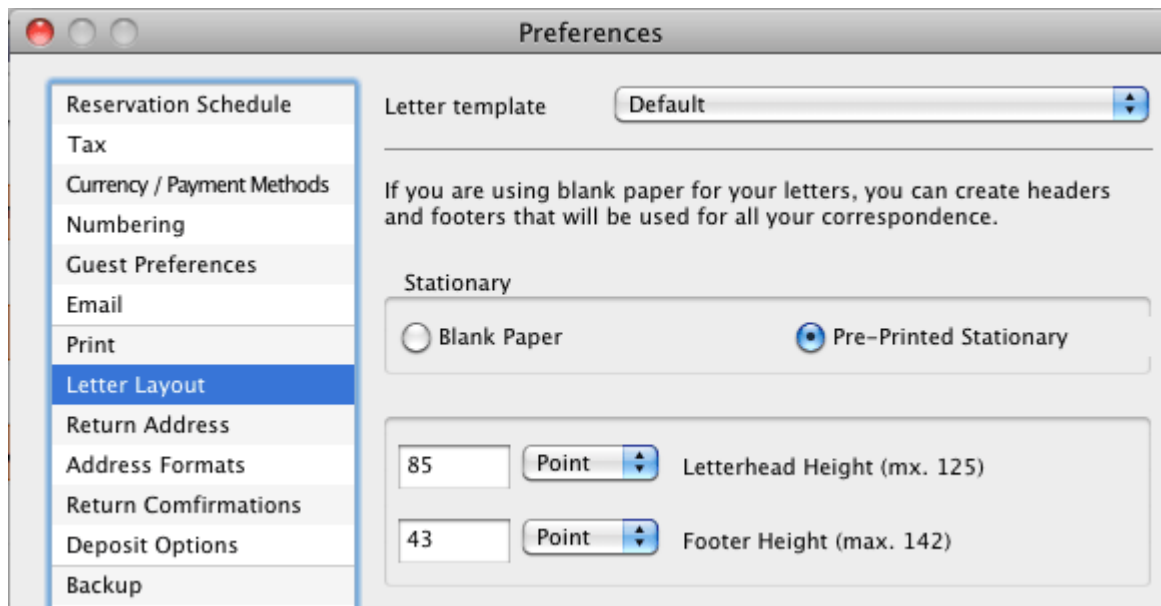
If you're using **pre-printed stationary** for all of your correspondence, please enter the height of the footer and header in millimetres.

Blank paper

For using **blank paper** when printing correspondence, select:
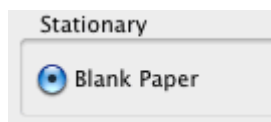
Now you can design your header (as text or with an image).

Create letterhead with an image

To add your company's logo into the **letterhead,** click the magnifying glass and select the file that is your logo. Your logo will show below the field for you to preview. You also have the option to align your logo on the left side, right side or the center of your paper.
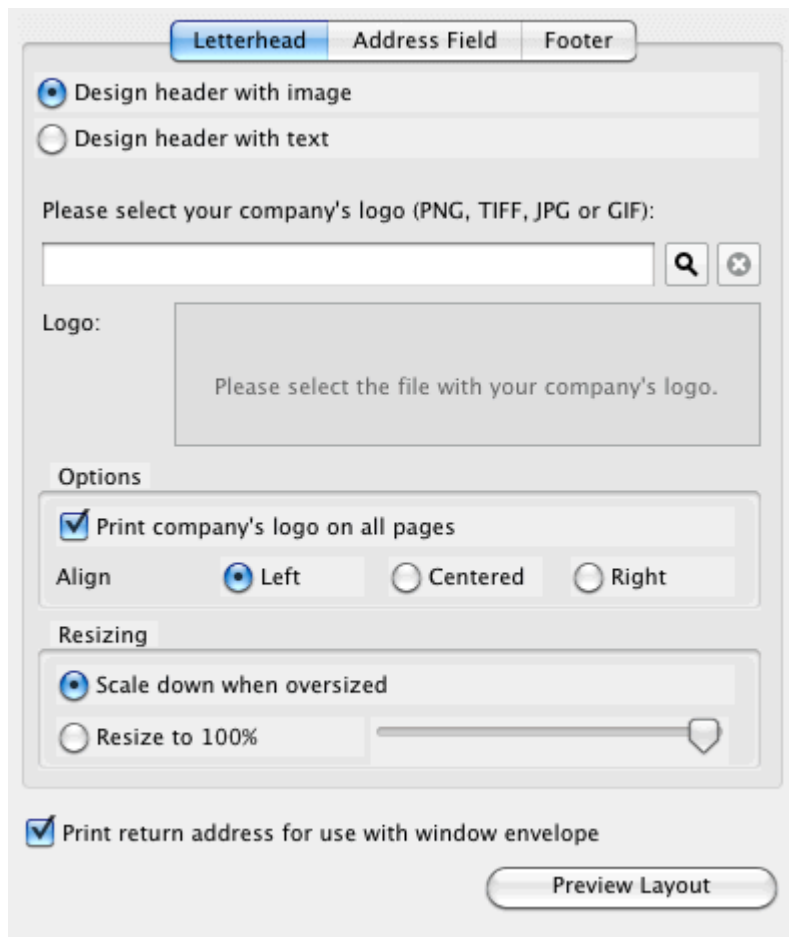
If you want your logo to be printed on all pages, check the box that says so.

> *The image has a **maximum dimension of 1400 x 2000px**. You may scale it to adjust the size it is printed as. Lodgit Desk prints at **72dpi**.*

Create letterhead as text

You can also create your letterhead using the text formatting menu. You can change the font size, family, style and colour of the text to create a logo of your choosing. You can align the text (left, right, center) by using the tab-key.
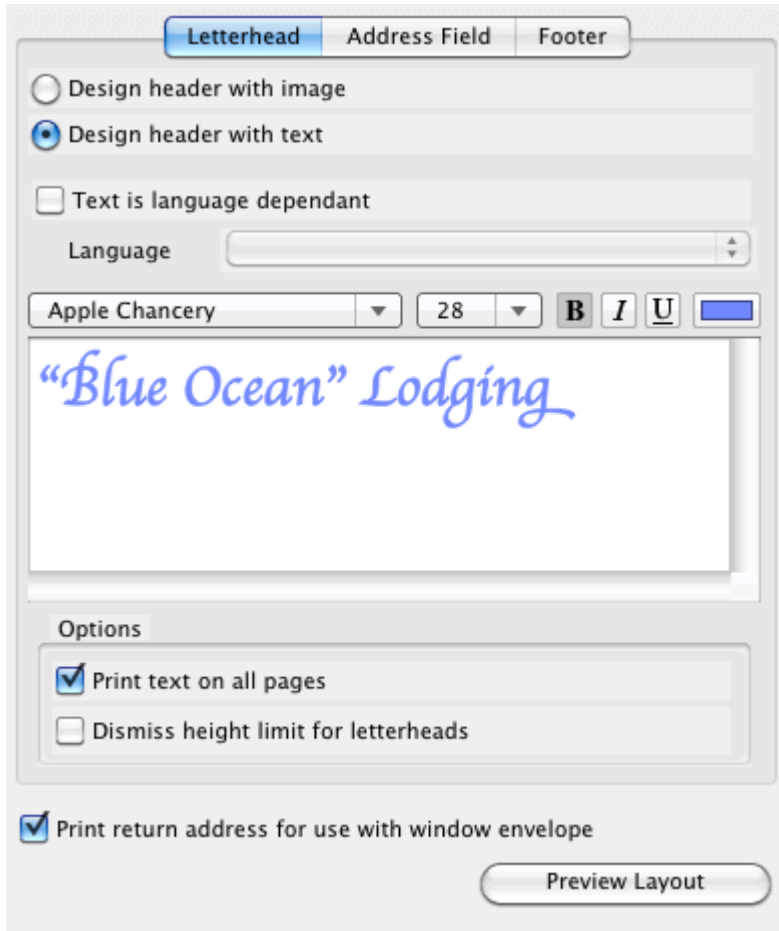
You can also choose if you want to print this letterhead on all pages (default settings only print it on the first page) and if you want to dismiss the header height limit.

> *Note:*
> *Using the header height limit helps make sure that the recipient's address is placed perfectly for the use of window envelopes. You should only dismiss it if you don't use window envelopes.*

If you want to print your return address as well and are using window envelopes, check the box that allows this.

Design letter footer

1. If you want to change the footer of your letters, click **Footer** and enter the data.
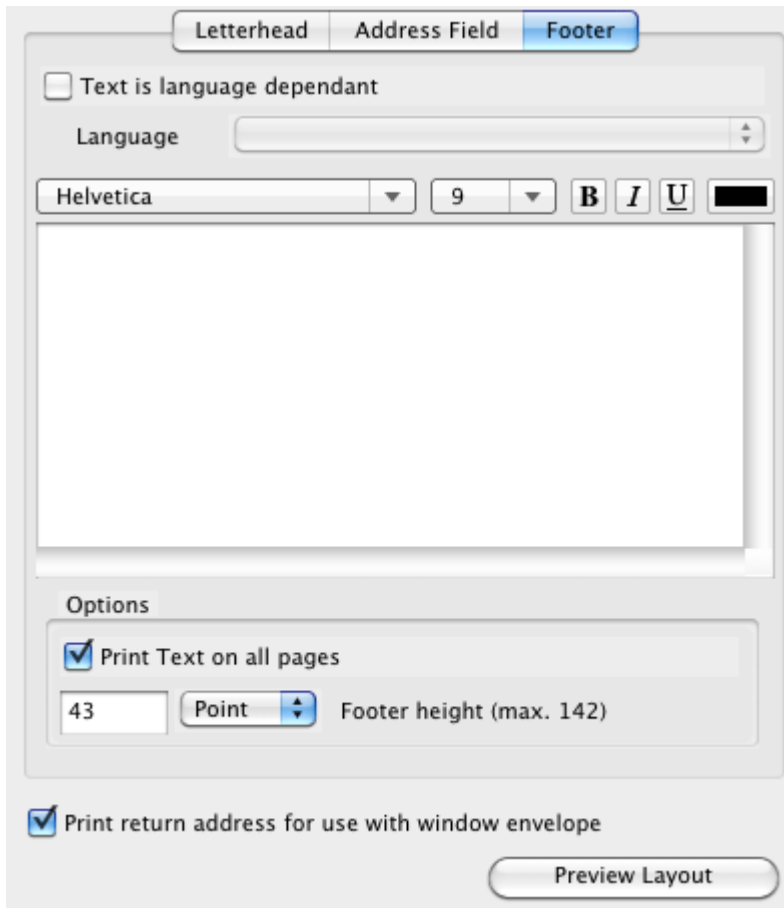
2. Edit the **font size and family** like you would in any other **text editing program**.

3. If you want to edit the **font colour**, click on the colour button. This will open a new window where you can select the colour and then press **OK**.

4. After you have finished your settings for the letter, you can preview them by pressing the button **Preview Layout**.

Settings for address field

If you want to change the setting for the address field, go to the tab **Address Field**.

Here, you can decide whether the address field is to be printed on the left or the right side of the page, if there should be any additional space between the page margin and the address field, how wide the address field is and if there is to be additional blank lines between the field and the letter content.

PRINT OPTIONS   UP   SENDER ADDRESS

Settings for the sender address

In the **Preferences** under **Return Address**, you can specify which return address will appear in the window of the envelope.

> *Note:*
> *These preferences are only relevant if you have checked the box that says "Print return address for use with window envelopes" in the letter layout section.*
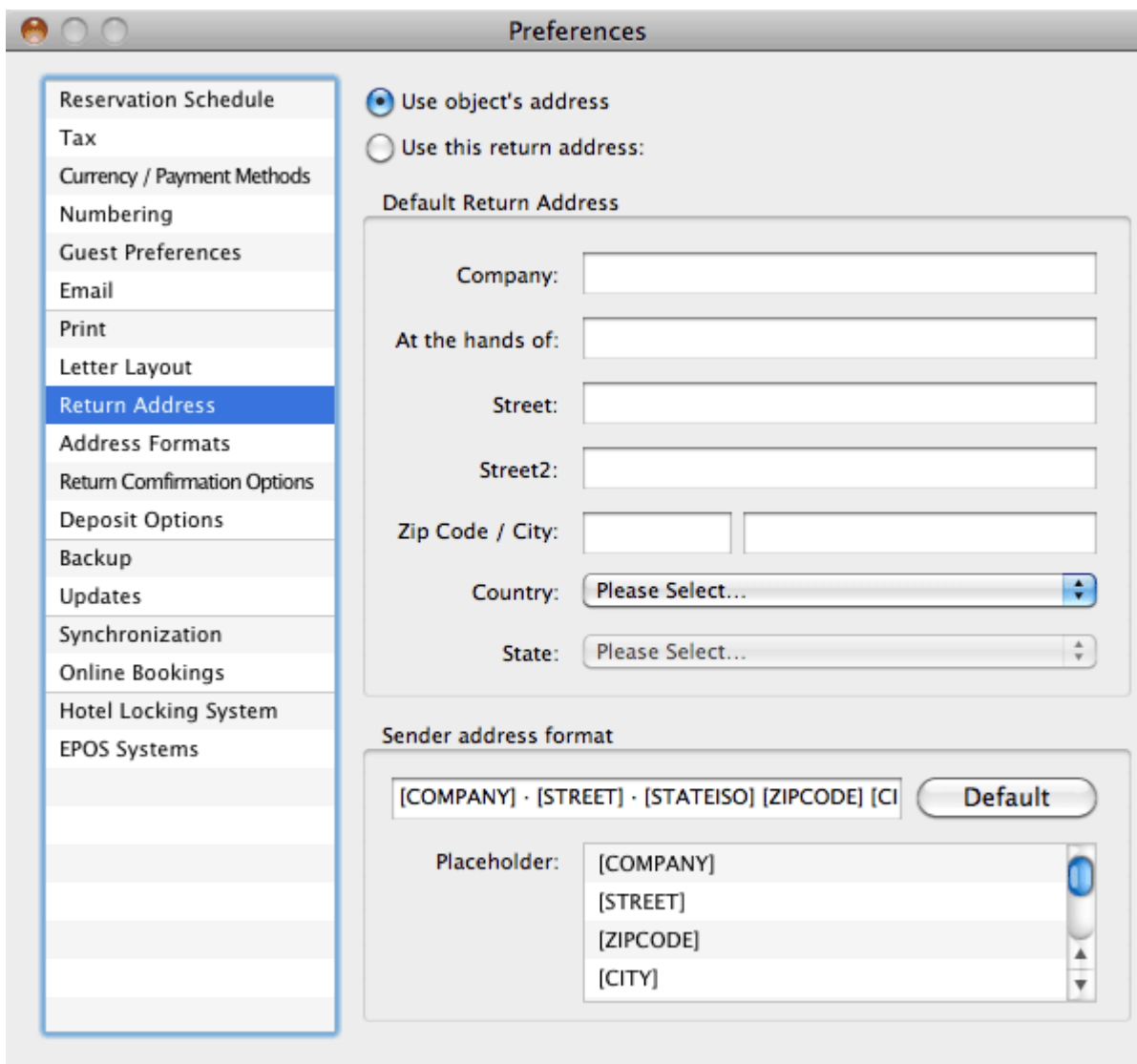
Select an option and enter the required data if you decide you'd rather use a different sender address. You can also edit the sender address to your liking using the placeholders. To add a placeholder to the field, simply double-click on it.

The **sender address format** lets you decide how your sender address will be printed for use with window envelopes. Double-click on a placeholder to copy it into the field, or manually type it in. Press "Default" to restore the default settings.

PREFERENCES FOR LETTER LAYOUT   UP   DEFINE COUNTRY ADDRESS FORMATS

Preferences for country address formats

You can define several address formats **depending on the country** that is saved in the profile of the guest. These formats will be used automatically when you create a new correspondence (letters, offers, confirmations and invoices).

To edit the default address formats and add formats for each country, go to **Preferences** and then select **Address Formats**.
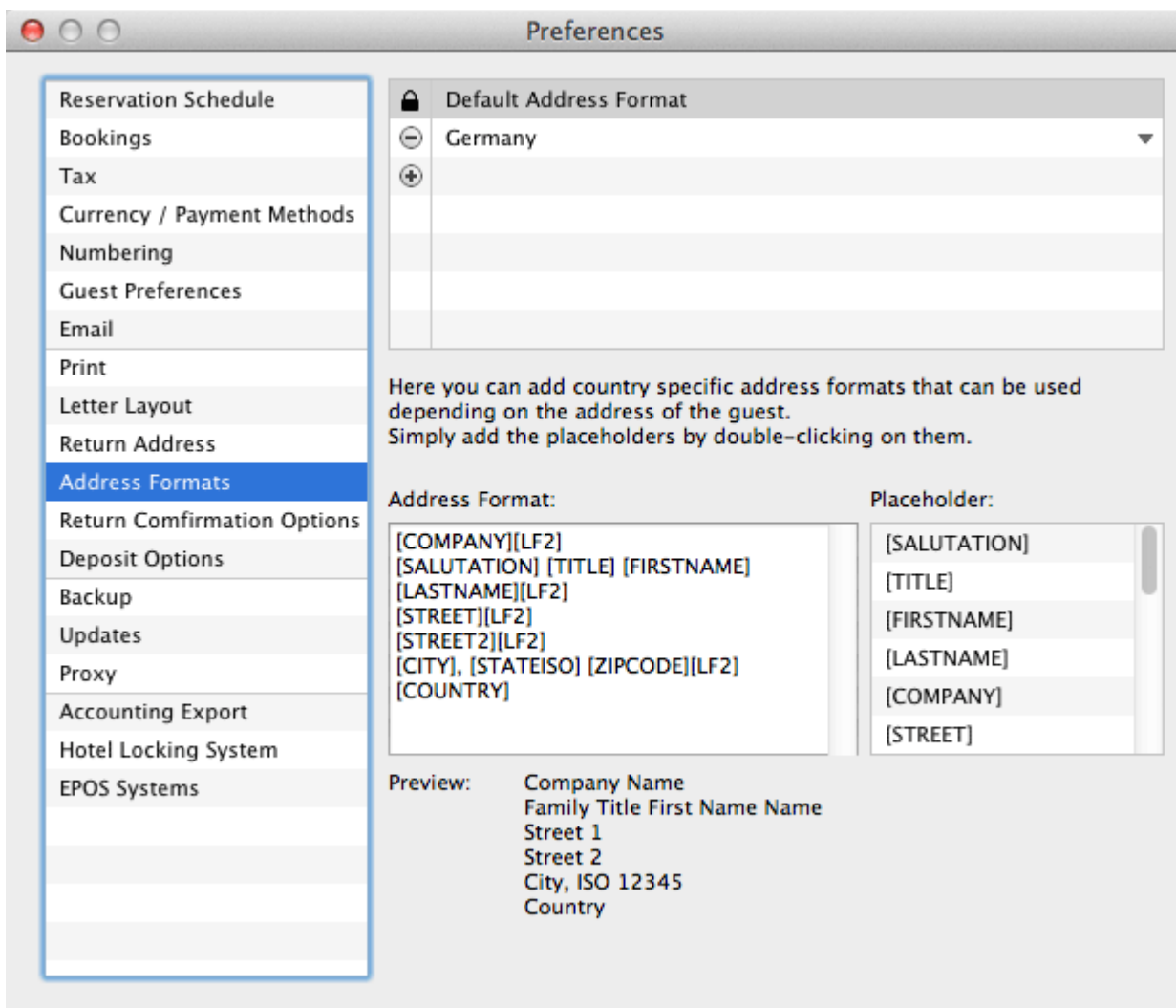
1. Clicking the ⊕ symbol will let you create a new address format. Clicking the ⊖ next to an existing format will delete it!

2. Clicking the triangle will let you select the country that this address format will correspond to. Every new format will automatically add the default placeholders that you can then edit.

3. If you edit the default address format or any other format, you can preview your changes in the example address at the bottom.

Changing the address format:

You can edit the address format by **moving the placeholders** and **adding new placeholders**.

To add a placeholder, click into the left field to where you want to add it and then double-click on the placeholder in the list to the right. You can also type the placeholders into the left field manually.

Format placeholders:

[LF1] = line break (always):	this will always add a line break; it does not matter whether there will be text added in the placeholder before the break or not (ex.: STREET2 is often an empty field).
[LF2] = line break (dependant):	this will only add a line break if there is a text added in the placeholder before it
[[Placeholder]] = capitalised	this will capitalise the text for this placeholder

> *Note:*
> *You can only create empty rows using [LF1].*

Address formats for guests:

You can create an individual address format for a guest in their profile.

Return Confirmation

In the **Preferences** under **Return Confirmation** you can edit the default options for how long a confirmation is valid (after how many days a return confirmation is due) as well as how the guest's address will be printed on the return confirmation. If you press the button "Default", the default settings will be restored.
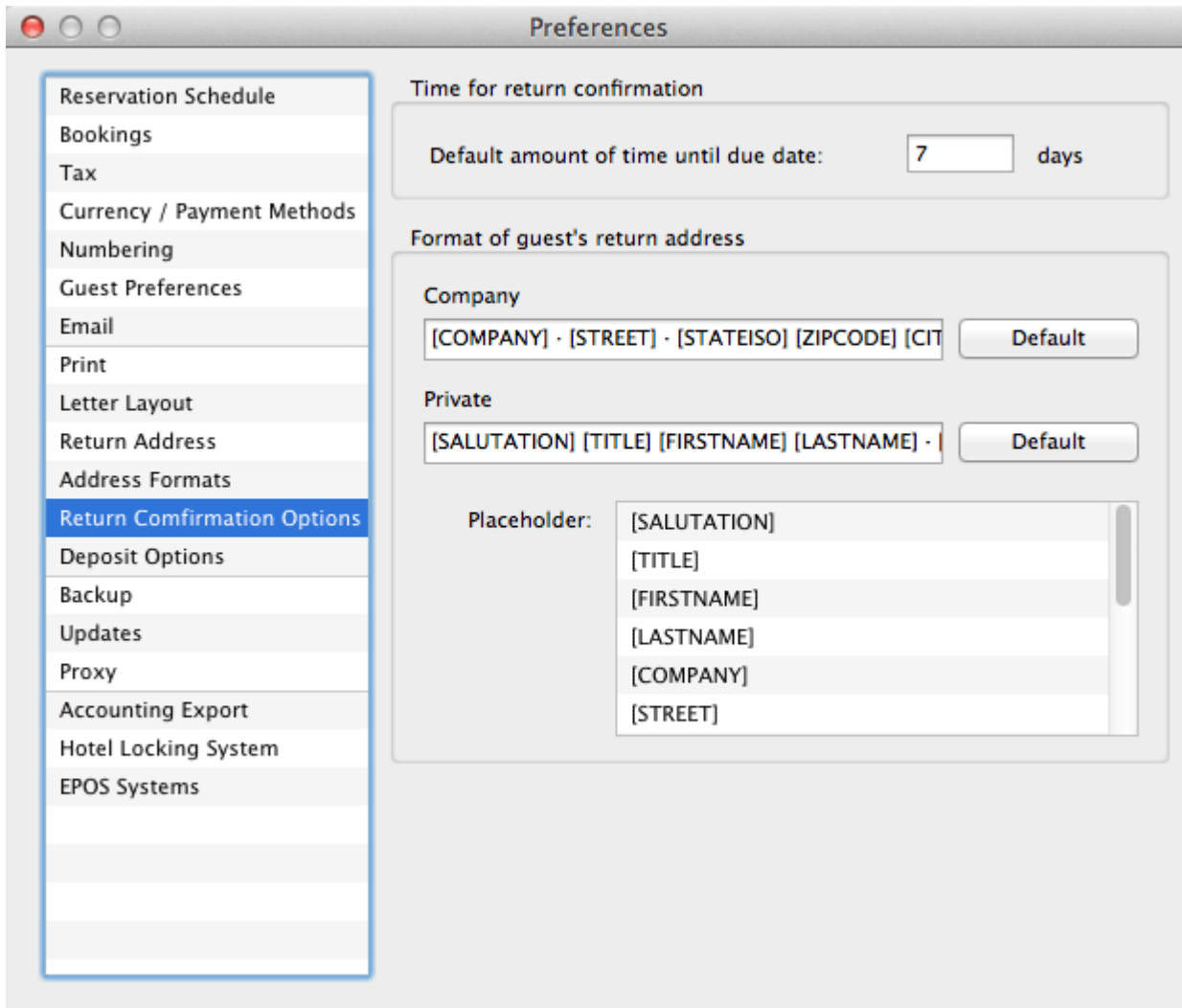
DEFINE COUNTRY ADDRESS FORMATS   UP   DEPOSIT OPTIONS

Deposit Options

To define different settings for deposits in Lodgit Desk, go to the **Preferences** and then the **Deposit Options** tab:
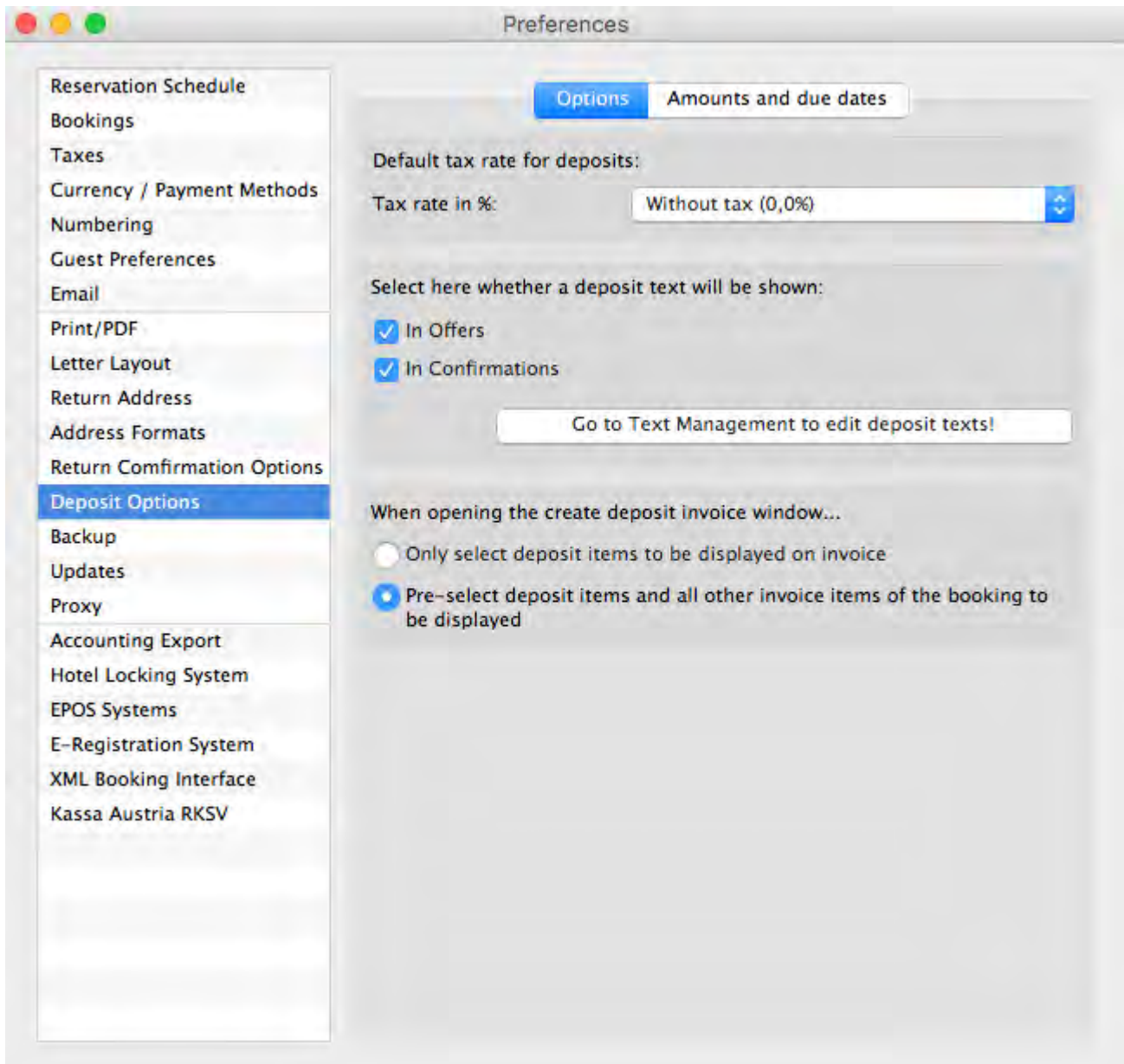
Offers and Confirmations

You can specify whether you want to show a text concerning deposits on offers and/or confirmations. For example: "We have received your deposit in the amount of 25 EUR on March 20, 2013 via Wire Transfer."

The texts that will appear on offers and/or confirmations can be edited if you go to **Administration > Texts** or by clicking the button **Go to Text Management to edit deposit texts!**

Amounts and due dates

To make adding deposits as easy as possible, you can also define a default amount (in relation to the booking amount). For group bookings, you can also decide whether you want to include all of the group's bookings into that calculation or only the booking that's selected.

You can also add different default options for when the deposit is due; either by x days from the current date or y days before arrival. When you add a deposit, the option with the checkmark will automatically be used. You may then select one of your pre-defined options or overwrite the date manually.

RETURN CONFIRMATION   UP   INVOICING OPTIONS

Invoicing options

In the invoice options, you can define different default settings for your invoices.

Define cancellation date

If you wish to have a uniform procedure for dating your cancellation invoices, you can specify here whether the original invoice date, the date of issue of the cancellation itself or an individual date is desired.
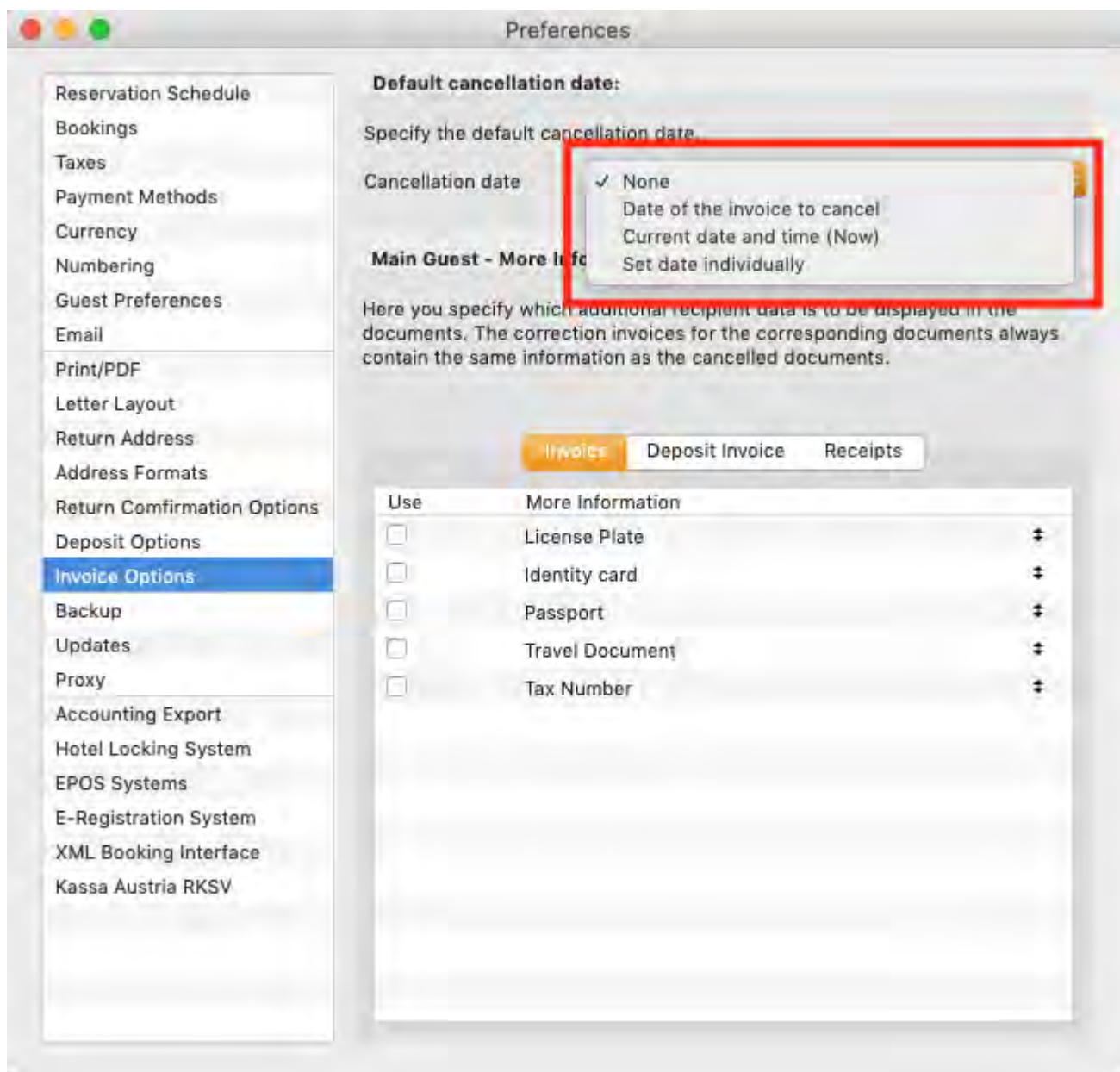
By default, no selection is made here.

Display further guest data on invoices

In some countries, it is necessary to include further data about the invoice recipient on invoices and receipts. If you select the corresponding checkbox, the specification is also listed on the invoice (or on documents and down payment invoices).
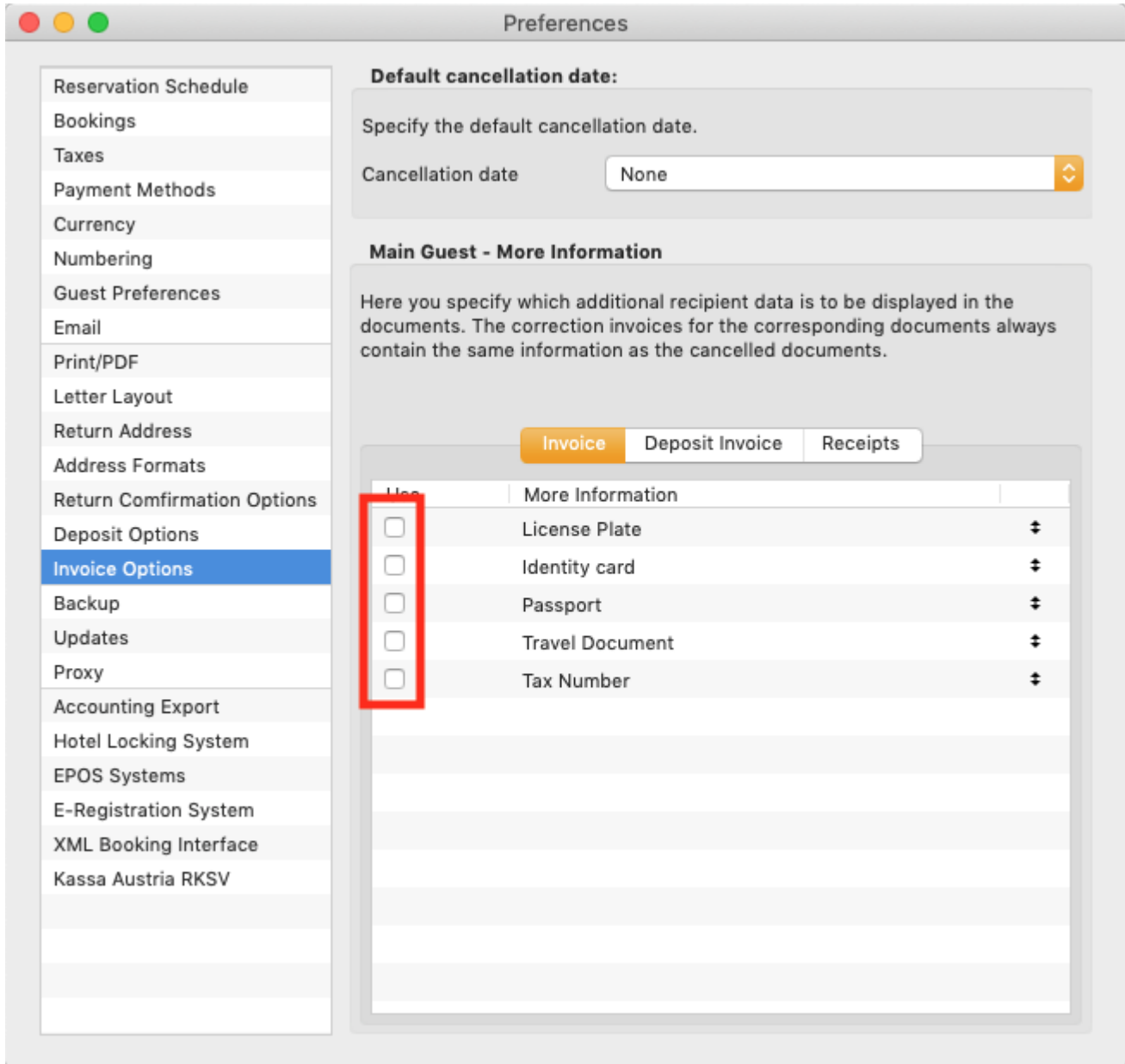
You also define these rules here for the corresponding correction invoices.

In order to display the information on the invoice, please configure these details in the guest administration.
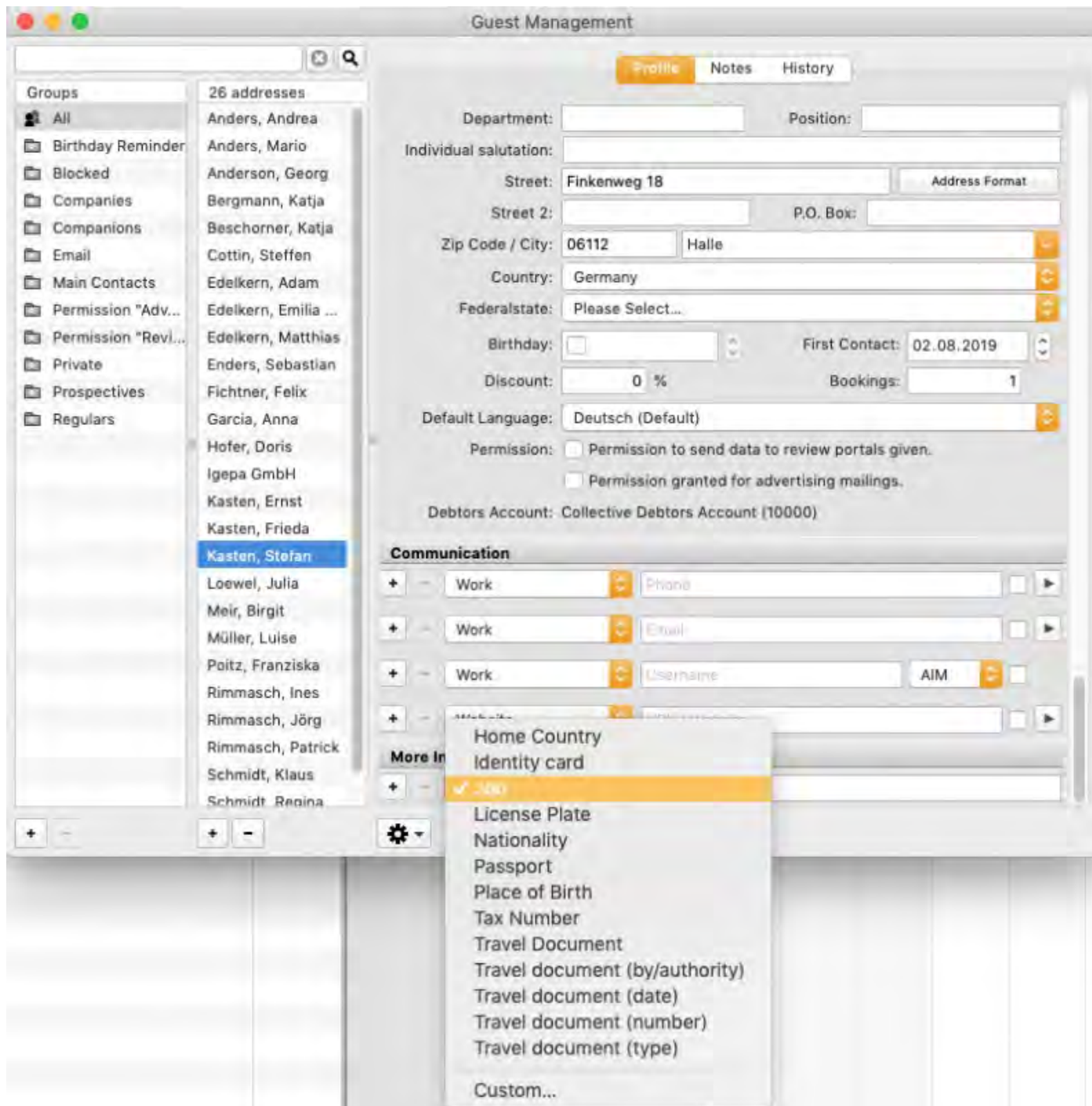
Under "further details" you can select e.g. tax number in the drop-down menu and enter it in the free field.

If you want the invoice to display the word "tax identification number" instead of "tax number", for example, you can adjust this in the text management > Correspondence for each individual document (except in quotations, confirmations and reconfirmations) or for each language you use.
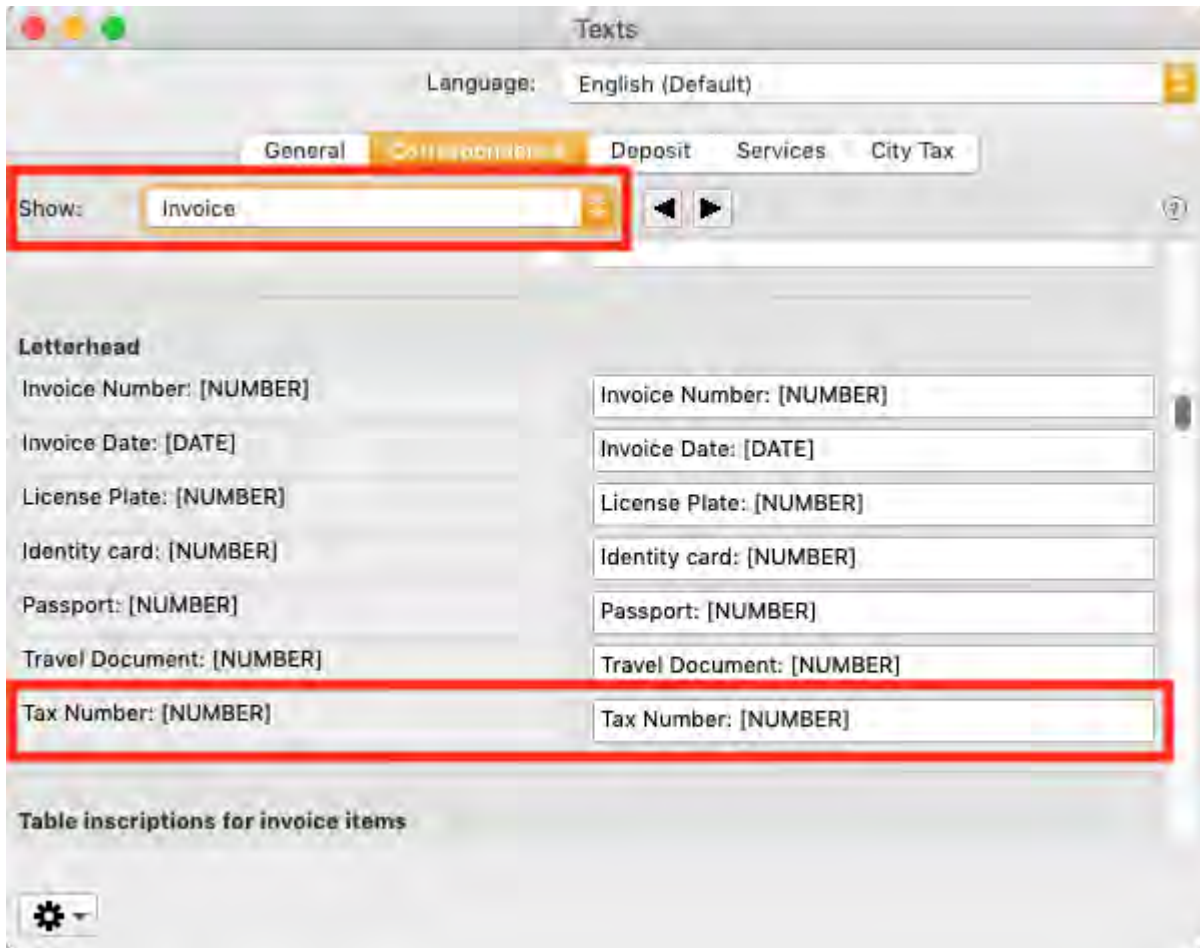
As a result, the additional information will appear at the top right of the invoice.

Example of an invoice with tax number of the guest

Attention: It is not possible to enter and display the field "Tax identification number" in the guest administration manually as an own field. There are only placeholders for the additional information listed in the settings.

DEPOSIT OPTIONS   UP   CREATE DATABASE BACKUP

Create database backup

ALL relevant data of your daily work is stored in the database file called "Lodgit Database.lxdb". Your data on guests, objects and rental units, extra items, receipts, cash book etc. are also stored in this file.

> Damage to or destruction of this file will inevitably result in the loss of all your data. The employees of Lodgit Hotelsoftware do NOT have access to your data and are therefore not able to restore it for you.

The protection of your data via backups is urgently necessary. With regard to data protection, please also ensure that you handle customer data responsibly.

To configure backups, please go to **Preferences** and then select the list item **Backup**.
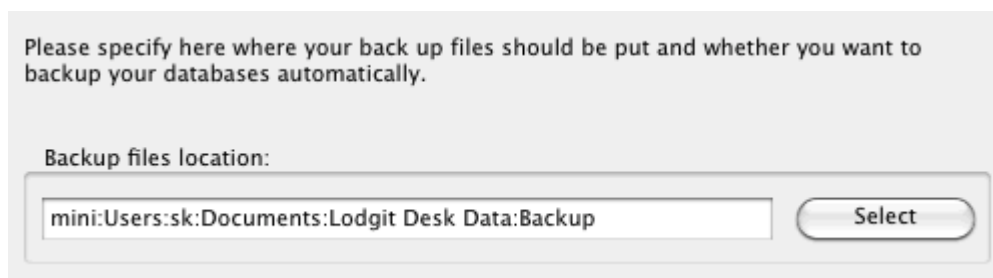
> If you are using the server feature *cubeSQL*, the backups have to be done by the server. More information here.

1. Select location for backups

If you click on the "Select" button, you can specify the location (path) for the backup of the database. Please note here that the backup copy must be stored either:

- on a portable data carrier (USB stick, external hard disk, NAS) or
- by a cloud service provider (in compliance with data protection laws)

> Please do not store backups directly on your work computer. This is the only way to preserve your data in case of a computer crash or similar.

Please specify here where your back up files should be put and whether you want to backup your databases automatically.

Backup files location:

| mini:Users:sk:Documents:Lodgit Desk Data:Backup | Select |

2. Configure settings for automatic backup

Check the box that says **Backup automatically**. This will give you several options, that you can also use in parallel:
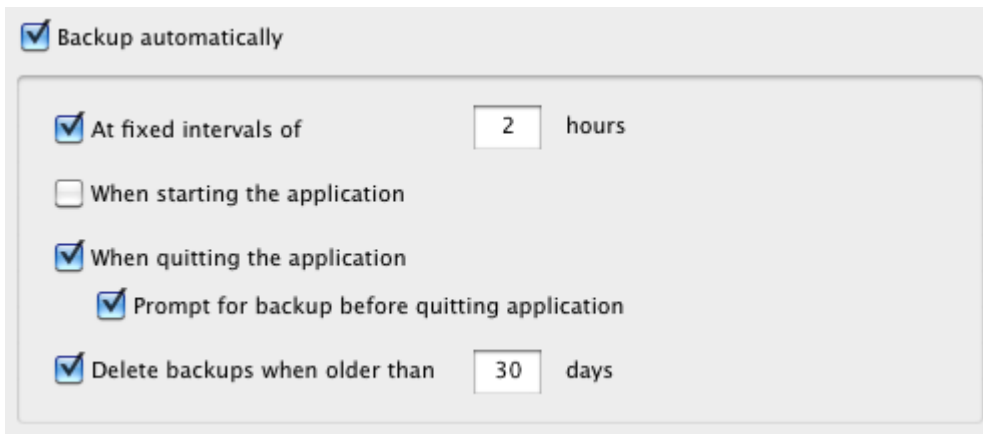
- backing up every x hours
- backing up when starting the program (always; without prompting)
- backing up when quitting the program (optional prompting)

Each backup creates a new file with a timestamp (e.g. Lodgit Database-2022-09-21-16-19-54.lxdb) so that you can select the time when you might need to restore.

> When setting, also note that any backups that fall outside of your scheduled time

period (1 - 30 days) will also be irretrievably deleted.

You can do a manual backup by going to File "Create Backup".

INVOICING OPTIONS   UP   CHECK FOR UPDATES

Check for updates

You can check for software updates automatically or manually.

Check for updates manually

Go to **Preferences > Updates** and then press the button "Check For Update Now".
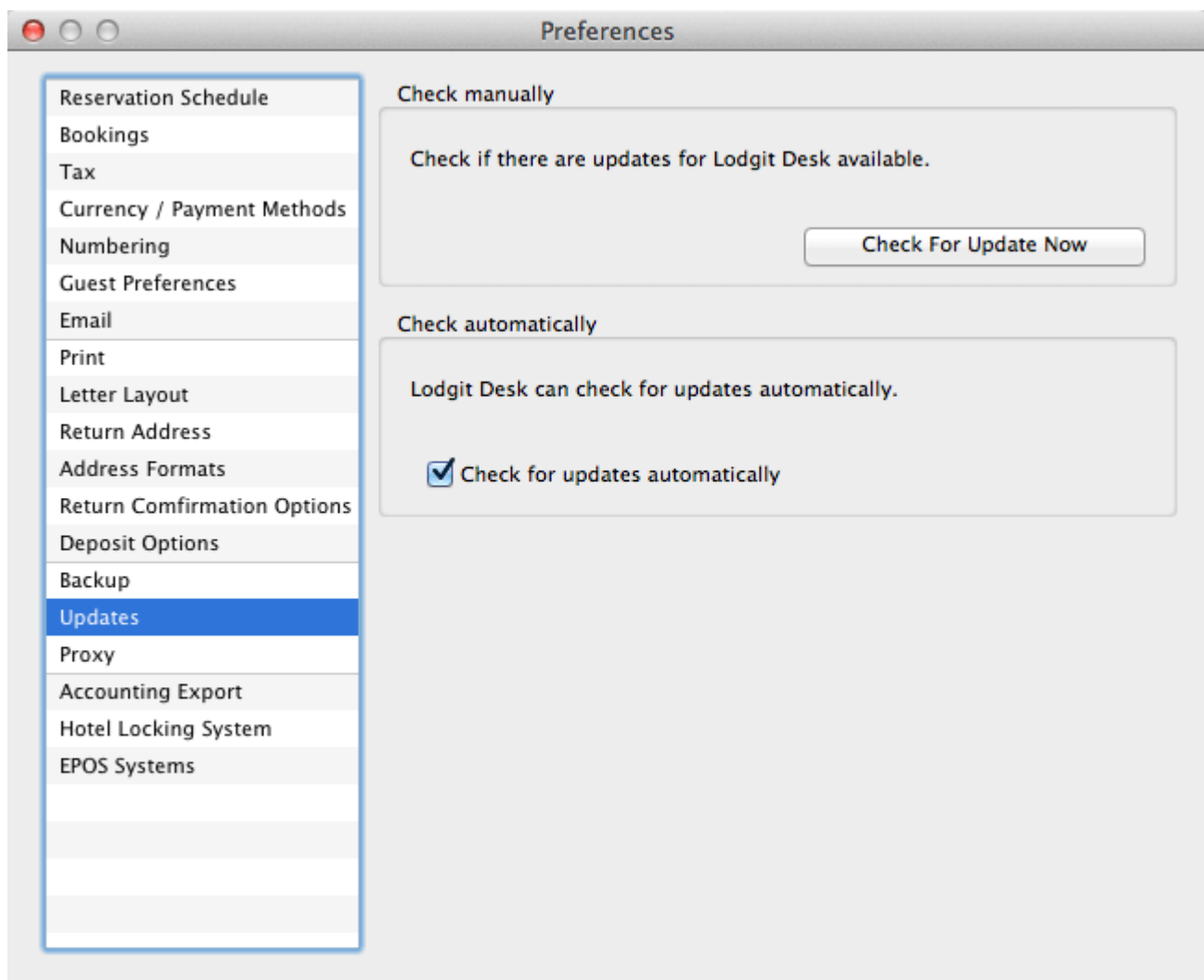
Check for updates automatically

Check the box that says **Check for updates automatically** and then, Lodgit Desk will be checking for updates automatically.

CREATE DATABASE BACKUP   UP   SETTINGS FOR PROXY SERVER

Settings for Proxy Server

If you want to use a proxy server to connect to the internet, you can define the setting for this by going to **Preferences > Proxy**.
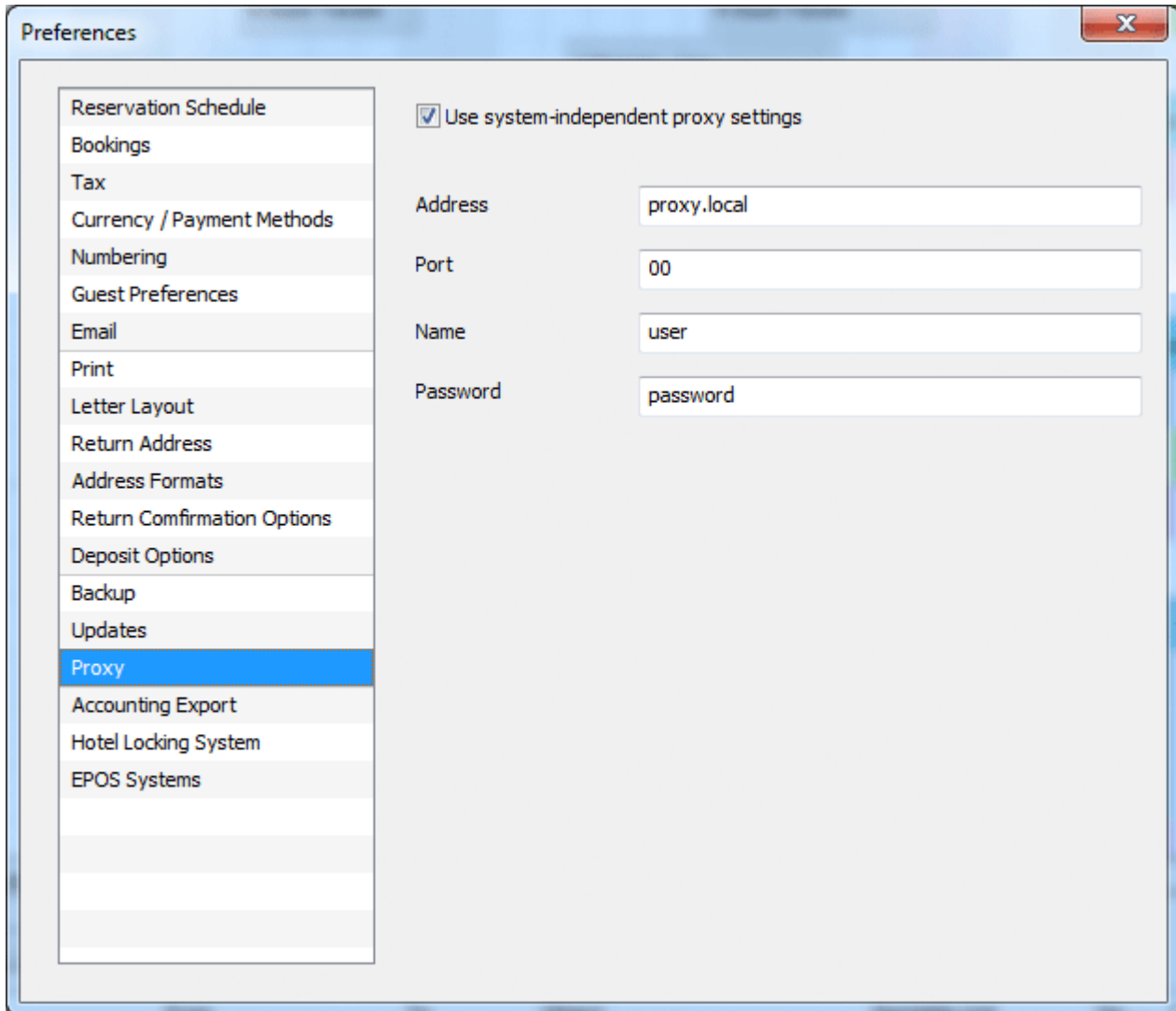
Enter the necessary information, such as the proxy's address as well as the port, username and password.

Make sure not to enter a protocol into the address (e.g. http://), but only the address or ip address.

CHECK FOR UPDATES   UP   ACCOUNTING EXPORT OPTIONS

Preferences for accounting export

Account numbers for accounting export

You can define the account numbers for the accounting export under **>Preferences >Accounting Export**.

These are the account numbers you use for your business' bookkeeping. If you're unsure of the numbers, please ask your bookkeeper, accountant or tax expert.
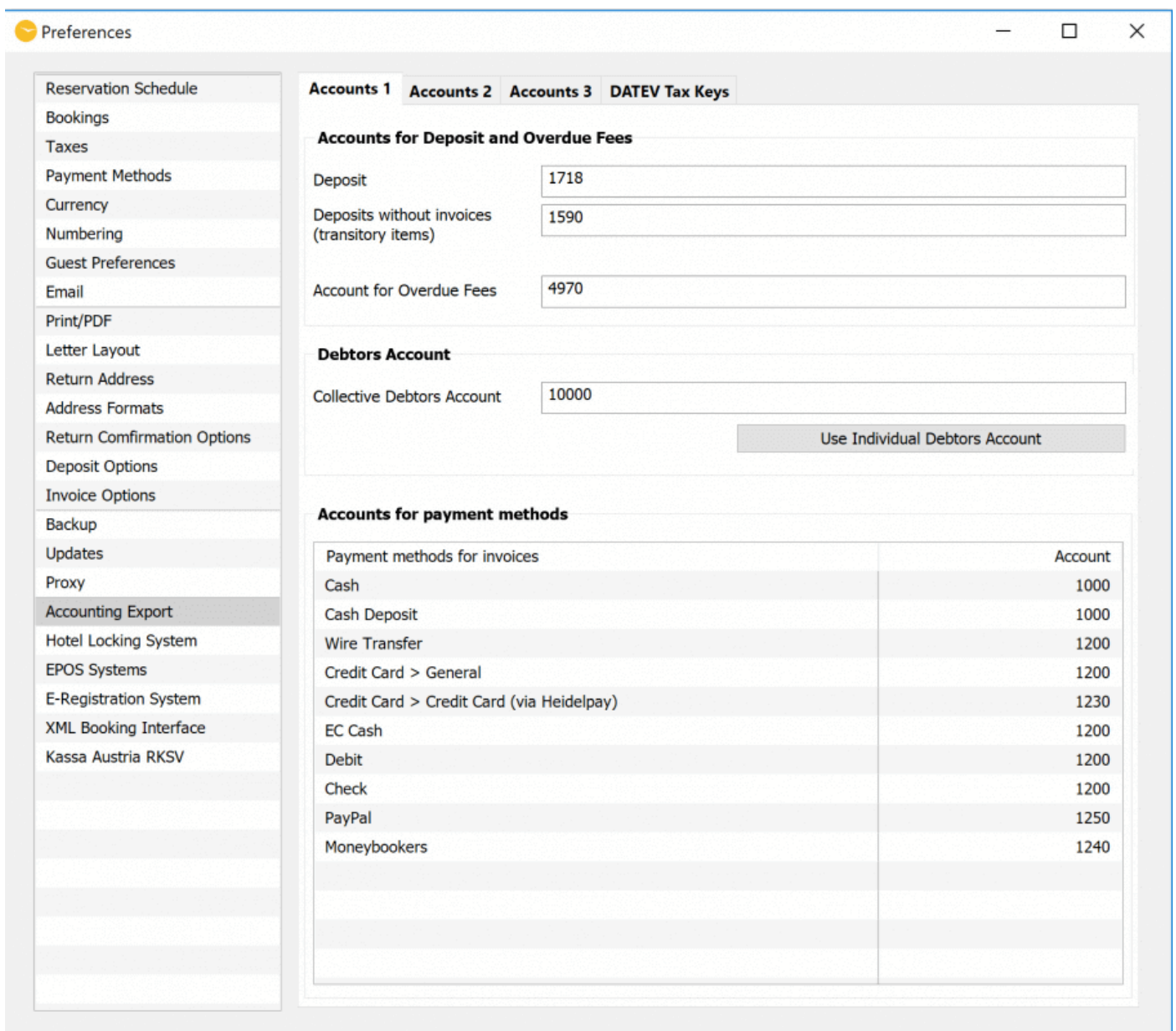
To enter or edit an account number simply double-click on the entry. Here you will find several tabs under which the following accounts are stored.

Accounts 1

Accounts for Deposit and Overdue Fees

Here you define the accounts that are used when you create a deposit invoice or add an overdue fee.

"Deposits without invoices (transitory items)" is only relevant for customers working with a database from 2016 or older. Since Lodgit version 1.15.8 it is no longer possible to create a deposit without invoice.

Debtors Account

You have the choice of working with a collective debtors account or with individual debtors accounts, that is, you enter a separate account for each guest. For individual accounts, please click on the button >Use Individual Debtors Accounts.

> Please note the following:
> This action cannot be undone.
> By using individual customer accounts, it is no longer possible to change the invoice recipient of an invoice once created.
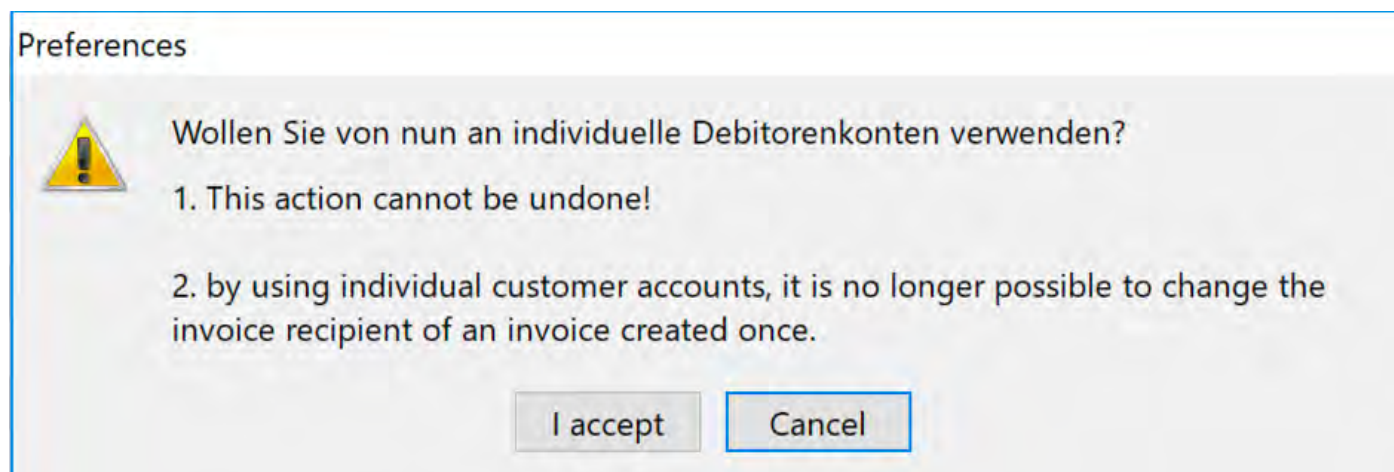
Once you have accepted this, you must enter the numbering for the individual debtors accounts.

From now on, when creating invoices, new account numbers will be assigned starting with the lowest number entered and then sequentially for each guest. If the guest already has an account number, the existing one is used.

If all numbers of the entered numbering have been assigned, you will receive a message from Lodgit. Please extend the numbering accordingly in the preferences.

Accounts for payment methods

Here you enter the financial accounts of the different payment methods.

Accounts 2

Accounts for cashbook

Here you enter the accounts for cash purchases and sales as well as for private deposits and withdrawals that are taken out of or placed into the cash register.

Default-Extras

The default extras refer to extra items that either go into Lodgit Desk via the EPOS interface, a channel manager or the online booking system and cannot be assigned to an extra item, for example, because it can no longer be found in the extra item management due to changes.
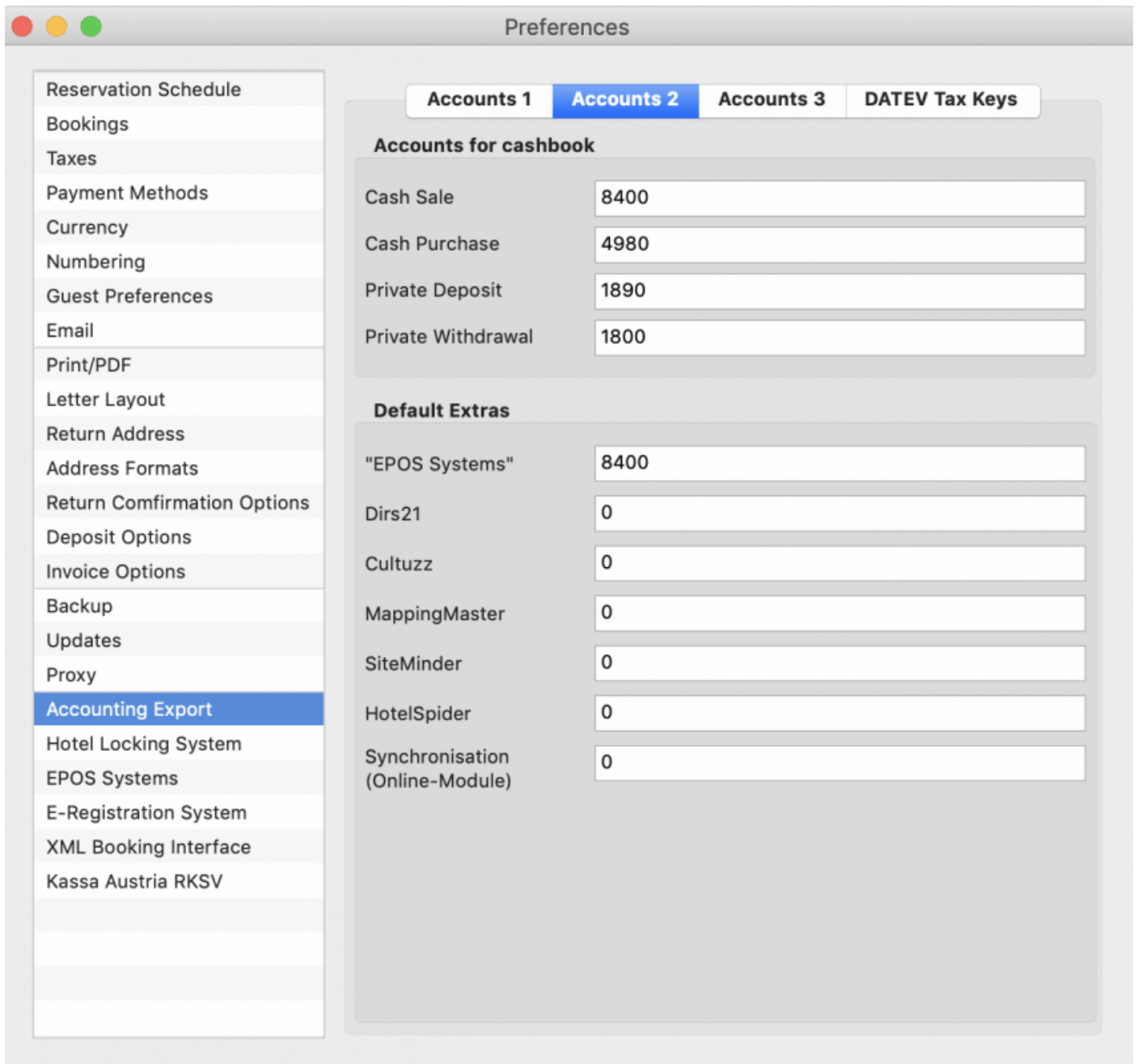
Accounts 3
Accounts for accommodations

If you only need a single account for the accommodation, select the >Simple option here.

If you have to use different VAT rates for a rental unit, e.g. because long-term or

short-term rental is possible, you can define a separate account here for each rental unit and each VAT rate created. Simply select >Detailed setting per rental unit and tax rate and enter the accounts.
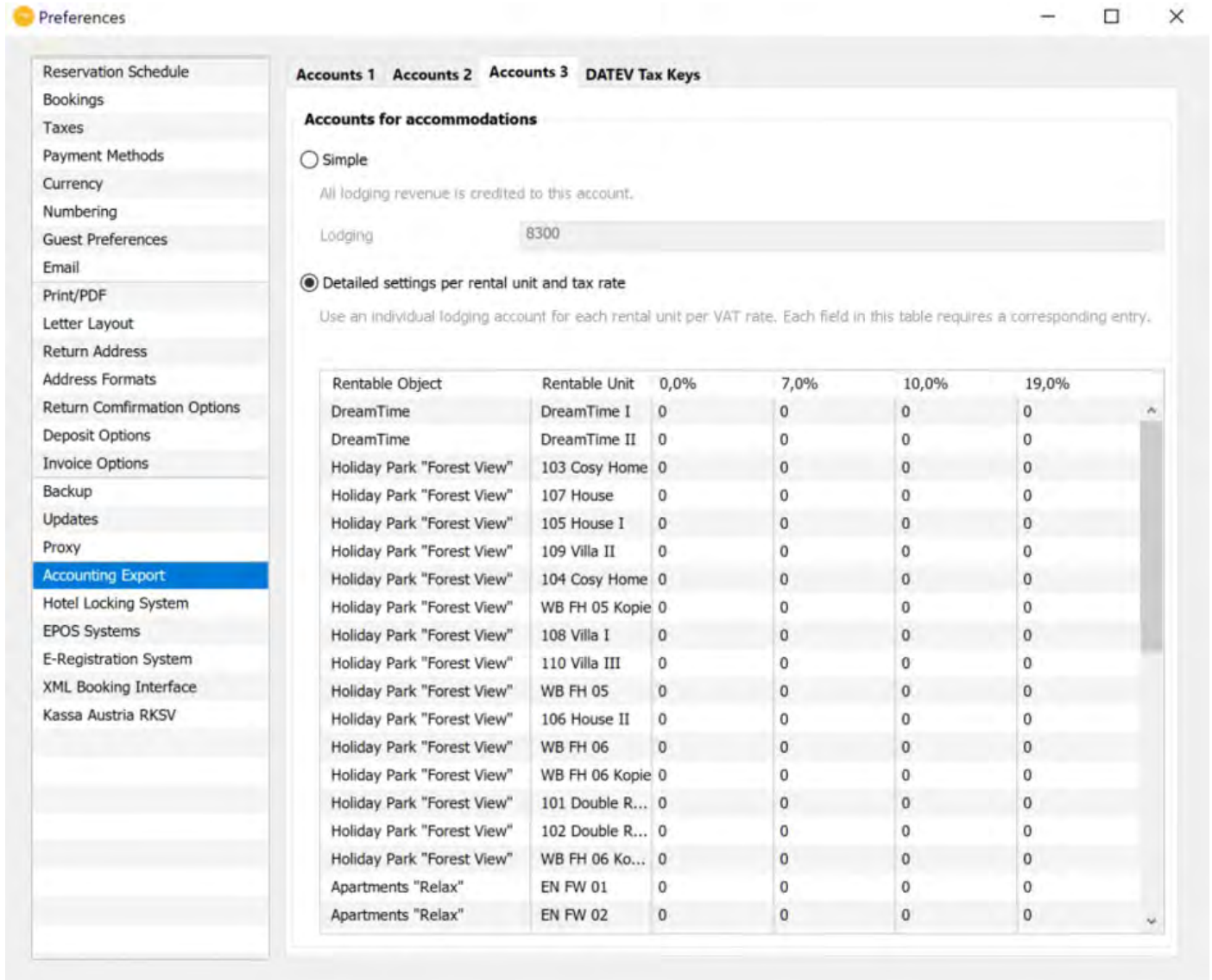
Datev Tax Key

Tax key

If you are using DatevPro Export, you can enter a tax key here for each VAT rate created, separately for positive and negative amounts.

Affected accounts

If you have switched off automatic tax function in your accounting program and want to export keys from Lodgit Desk instead, specify the accounts to which the tax keys created above apply.
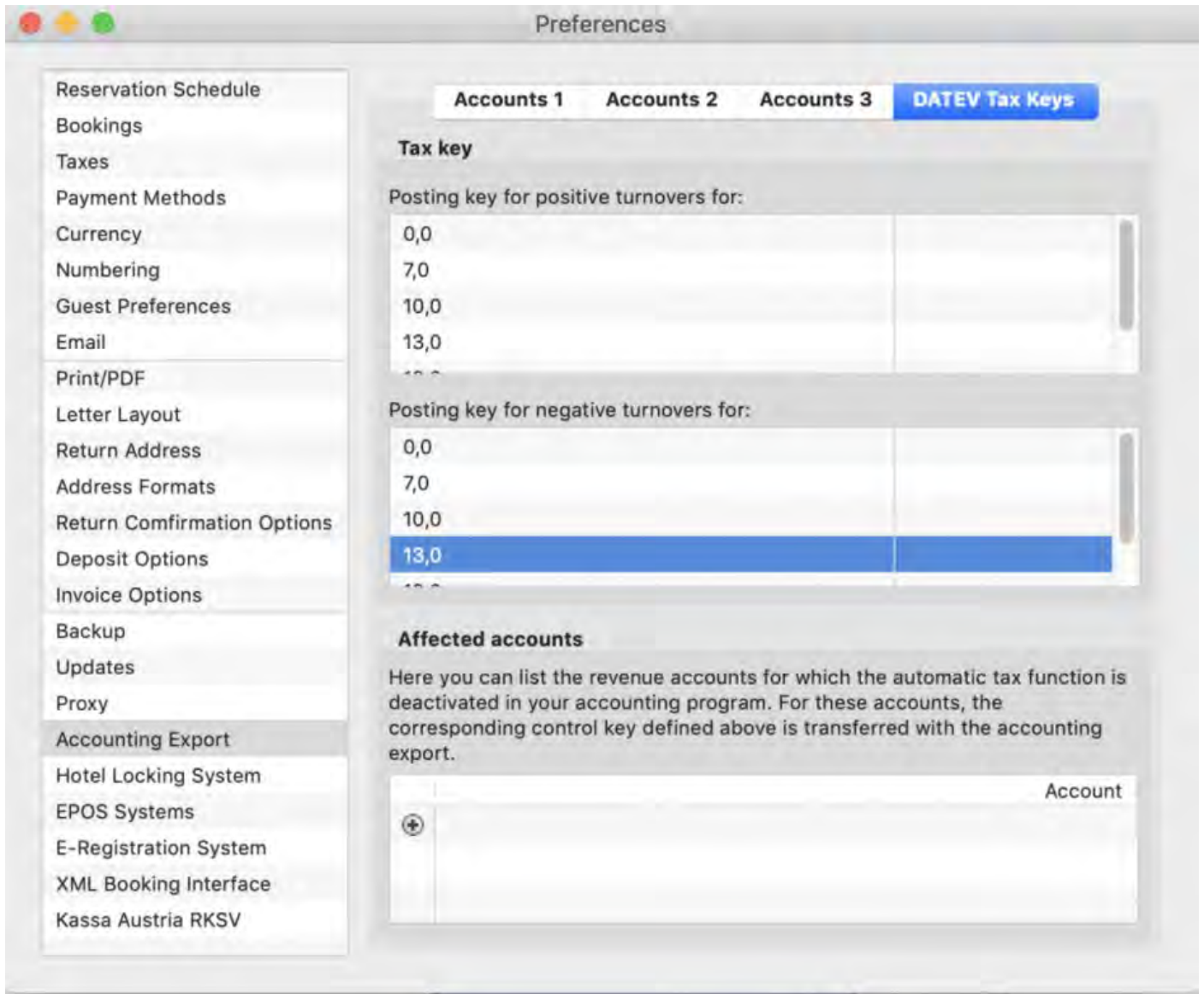
Further bookkeeping accounts

You define the accounts for Extras in >Administration >Extra and Packages >Extras and the and the Accommodations Tax in >Preferences >Taxes.

> **Please note:**
> Using incorrect account numbers can be detrimental to the import of the created file. Make sure all numbers are entered correctly. Changes in the account numbers only affect future entries.

SETTINGS FOR PROXY SERVER   UP   OBJECT MANAGEMENT

Object Management

To add a new object or rentable unit, or edit an existing object or rentable unit, got to the **Object Management** by going to the menu bar item **Administration > Objects and Rentable Units** or pressing the **Objects** button above the reservation schedule.
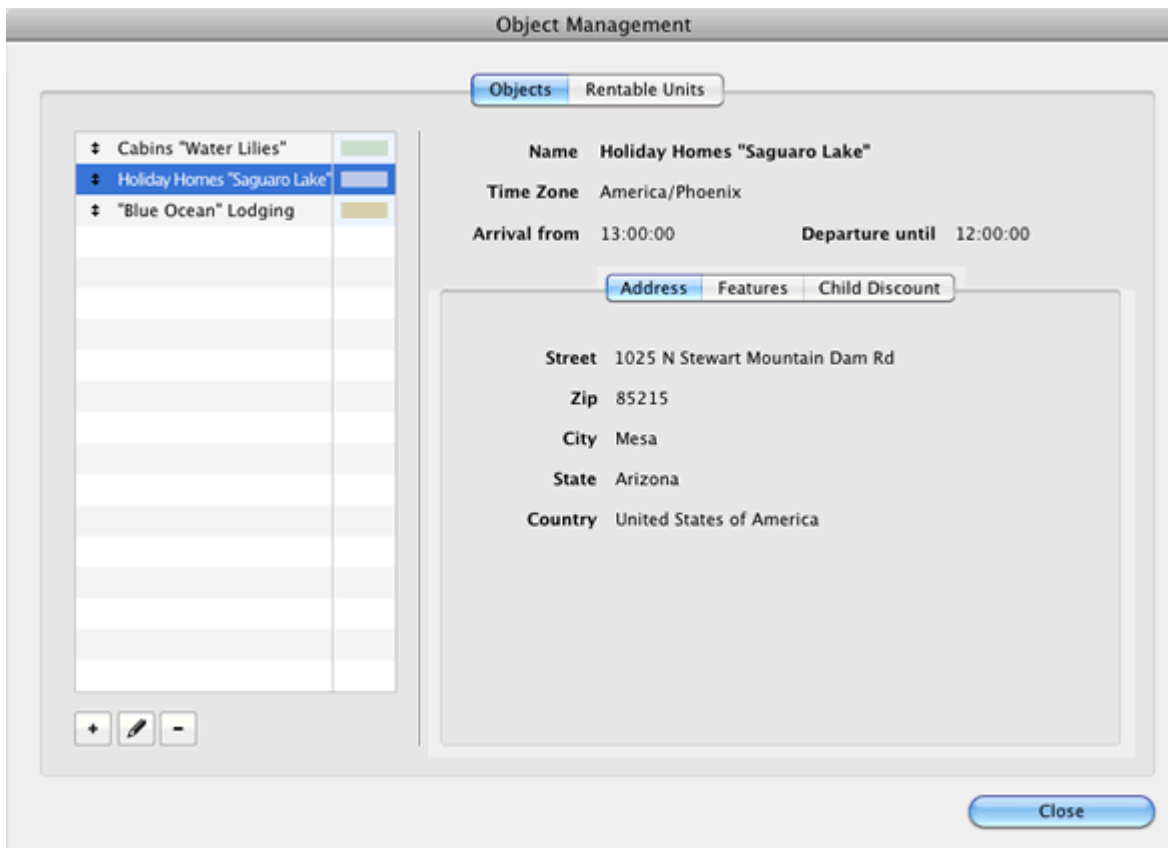
If you have already created one or more objects, you can open the **Object Management** by double clicking on it in the list to the left of the reservation schedule. This will automatically open the window with the **Objects** area.

If you have already created one of more units, you can also open the **Object Management** by double clicking on a unit type in the list to the left of the reservation schedule. This will automatically open the window with the **Rentable Units** area.

You can also open the **Object Management** by double clicking on a unit in the reservation schedule. This will open the are for the **Rentable Unit Details**.

> **Tip:** You can change the order of the objects in the list by clicking and dragging its double-arrow up or down. The new order will also be reflected in the reservation schedule.

In the **Object Management** you can do the following things:

Create and delete objects
Edit object information
- Edit an object's profile
- Add child discount for an object
- Specify features for an object
- Use different numbering for different objects
- Use different letter templates for your objects

Create and delete rentable units
Edit rentable unit information
- Edit unit's profile
- Define Features for a rentable unit
- Automatically change the cleaning status of a rentable unit
- Add short description for a rentable unit
- Link package to a rentable unit
- Optional: packages bookable online
- Define print options
- Statistics options
- Notes
- Automatically add a city tax to each new booking

When you press the **Close** button, the **Object Management** window will be closed.
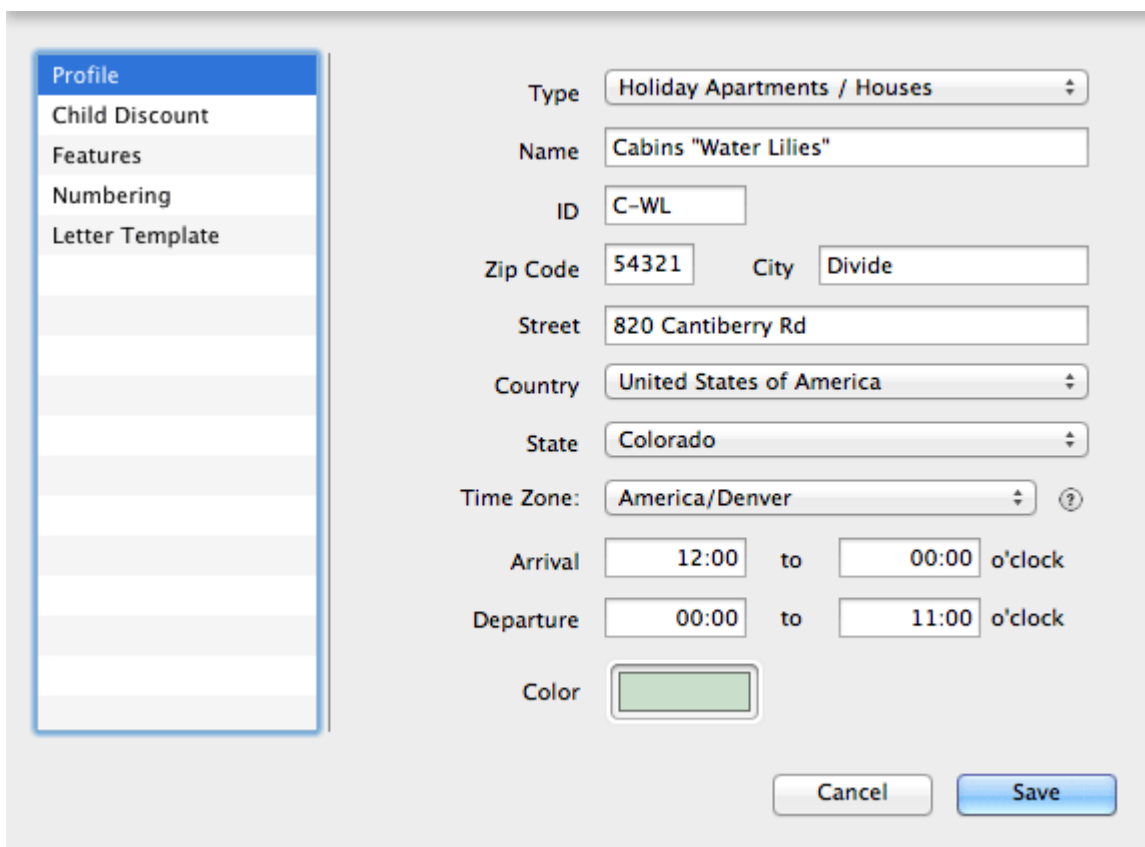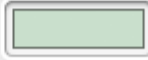
Create and delete objects

Create object

1. Open the Object Management.

2. Go to the lower left corner of this window and press the [+] button underneath the object list which will open the **Object Details**.

3. In the **Profile** area you can enter the object's information.

4. After you are done, press **Save**. This will close the window for the **Objects** and the window for the **Object Management** will be shown again. In this window, your object is still selected and the information about it are shown in the right area of the window.
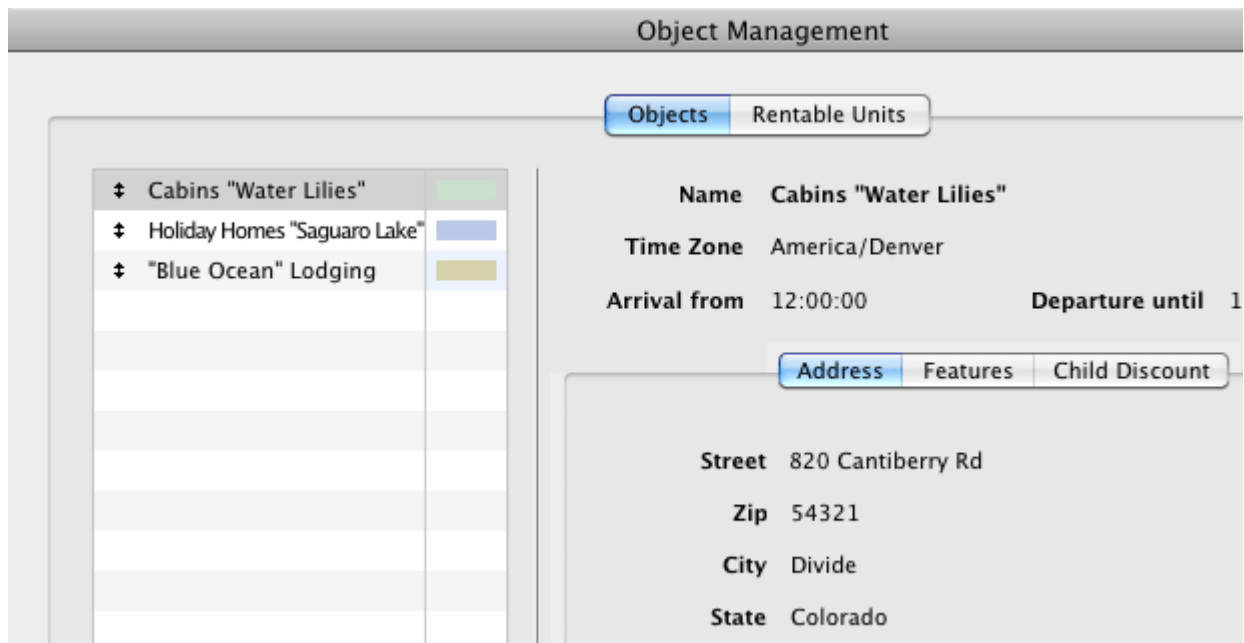
5. Close the **Object Management**. The reservation schedule in the main window will be shown now. This is where you can see all your created objects with their rentable units.

Delete object

1. Open the Object Management by going to the menu bar item **Administration > Objects and Rentable Units**.

2. Go to **Objects**.

3. Select the object that you want to delete and then press the ⬜ button.

You can only delete objects if there are no current or future bookings listed in any of its units.

OBJECT MANAGEMENT   UP   EDIT OBJECT INFORMATION

Edit object information

To edit the object's information or add more, open the Object Management.

In the **Object Management** window, select the object you want to edit and then double click on it or press the [pencil icon] button.

This will open the window for the **Object Details**.

Select the list item from the left list that you want to edit:

Edit an object's profile
Add child discount for an object
Specify features for an object
Use different numbering for different objects
Use different letter templates for your objects

Clicking on a list item will open its are on the right side where you can enter your data.

After you are done editing the rentable unit, press **Save**. This will close the window for the **Object** and the window for the **Object Management** will be shown again. In this window, your object is still selected and the information about it are shown in the right area of the window.

CREATE AND DELETE OBJECTS   UP   EDIT AN OBJECT'S PROFILE

Edit an object's profile

Open the object you want to edit by selecting it in the **Object List** in the **Object Management** and then pressing the ✏ button.

This will open the object's details with its profile.

Once you have finished editing, press **Save** or go to a different list item that you want to edit.

> *Note:*
> *Please make sure you understand the Definitions of the unit categories when selecting the unit type!*

EDIT OBJECT INFORMATION   UP   ADD CHILD DISCOUNT FOR AN OBJECT

Add child discount for an object

You can specify a **percentage child discount** in the Object Management which you can then quickly select in the booking window. This is only possible if the unit's price depends on the **number of guests staying in the room** (e.g. per night/person).

1. Open the object by selecting it in the **Object Management** window and pressing the Edit button.

2. In the left list select the item **Child Discount**.

3. Add the information about the **child discount**. You can use a maximum of 3 discount levels, with one of the levels being a 100% discount (e.g. for infants).

4. After you have completed the information for the object, press **Save** or switch to a different list item.

When you press **Save**, the current changes will be saved, the window for the **Object Details** will be closed and the window for the **Object Management** will be shown again. The object you were currently working on is selected and the information will be shown in the right area.

> **Alternative**:
> *If you want to add a child discount in units where the price does not depend on the number of guests staying in the room (e.g. per week), you can add* **a child discount as an extra item** *with a negative amount.*

EDIT AN OBJECT'S PROFILE   UP   SPECIFY FEATURES FOR AN OBJECT

EDIT AN OBJECT'S PROFILE   UP   SPECIFY FEATURES FOR AN OBJECT

Specify features for an object

1. Open the object you want to edit by double-clicking on it in the **Object List** in the **Object Management**.

2. In the left list select the list item **Features**.

3. To add features to the object, select them in the left catalogue listing the available features. You can select single features or several at the same time.

If you want to select several features that are next to each other at the same time, simply click and drag the mouse cursor over them. You could also select the first list item, then hold the SHIFT key and selecting the last item. This will select not only the first and last item, but all the ones in-between as well.

If the features are not next to each other, select the first feature and then hold down the CTRL key (Windows) or the CMD key (Mac OS X) whenever selecting another item.

4. A click on the right arrow button [>] will send the selected features in the left catalogue to the right one. If you want to delete features that are no longer relevant or that you have added accidentally, select them in the right catalogue and press the left arrow button [<] to send them back into the left catalogue.

5. After you have completed the information of the object, press **Save** or switch to a different list item.

Pressing **Save** will close the window for the **Object Details** and the window for the **Object Management** will be shown again. In this window, your object is still selected and the information about it are shown in the right area of the window.

ADD CHILD DISCOUNT FOR AN OBJECT   UP   USE DIFFERENT NUMBERING FOR DIFFERENT OBJECTS

Use different numbering for different objects

When creating offers, confirmations or invoices you can use different numbering systems for each object, which will then count upwards automatically.

Linking a numbering system that you have previously created in the Preferences to an object can be done with the following steps:

1. Open the object you want to edit by selecting it in the **Object Management** and then pressing the Edit button.

2. In the left list, select the list item **Numbering**.

3. In the drop down menus, select the numbering you would like to use for offers, confirmations and invoices for this object in the future.

4. After you have selected the numberings for the object, press **Save** or switch to a different list item.

Pressing **Save** will close the window for the **Object Details** and the window for the **Object Management** will be shown again. In this window, your object is still selected and the information about it are shown in the right area of the window.

Use different letter layout for different objects

When creating correspondence you can use a different letter layout for each object.

Linking a letter layout that you have previously created in the Preferences to an object can be done with the following steps:

1. Open the object you want to edit by selecting it in the **Object Management** and then pressing the Edit button.

2. In the left list, select the list item **Letter Template**.

> *Tip: If you often send offers/confirmations via email but print out invoices on pre-printed stationary you can set up two different letter layouts and add them here to automatically have the correct layout chosen whenever you create a certain piece of correspondence.*

3. In the drop down menus, select the letter template you would like to use for offers, confirmations, invoices, invoice cancellations and other correspondence for this object in the future.

4. After you have selected the numberings for the object, press **Save** or switch to a different list item.

Pressing **Save** will close the window for the **Object Details** and the window for the **Object Management** will be shown again. In this window, your object is still selected and the information about it are shown in the right area of the window.

Use different numbering for different objects   Up   Create and delete rentable units
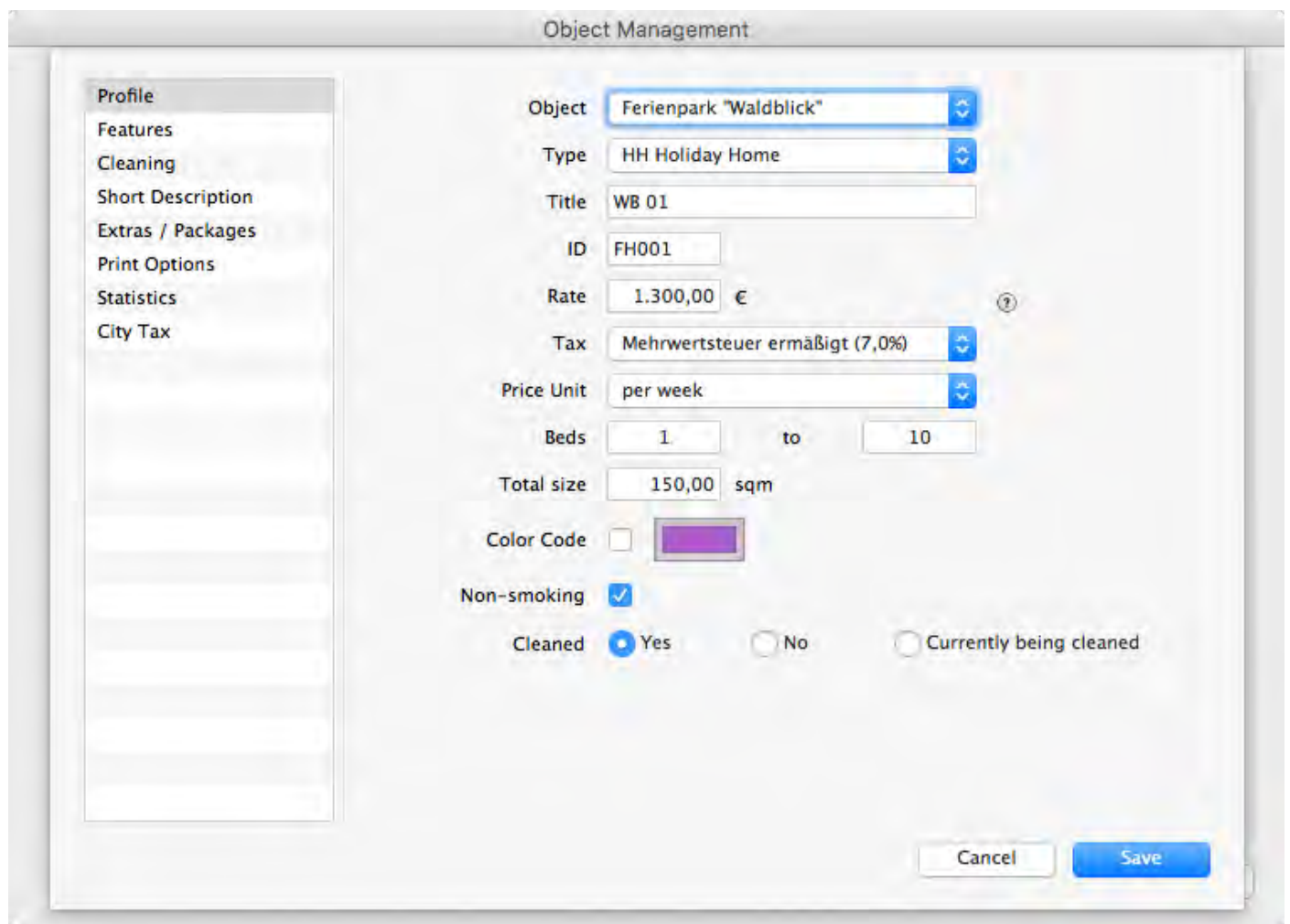
Add rentable unit

1. Open the Object Management.

2. In the **Object Management** go to the **Rentable Units**. This will show all the rentable units.

3. To add a new rentable unit, go to the left lower corner and click the [+] button (below the unit list).

> ### Note:
> *You can duplicate rentable units. If you have a lot of units that are almost identical it is recommended to create one rentable unit entirely and then **Duplicating** it (by using the context menu). This will save time.*

4. In the **Profile**, select the **Object**, the **Unit Type**, the **tax rate**, the **Price Unit** and the **Status**. Add the **Rate**, the **Number of Beds** and the **Total Size**.

The **number of beds** shows the minimum and maximum occupancy of this unit and will be shown in the **reservation schedule** next to the rentable unit. Please note that the number of beds may not be lower than 1, no matter which type of unit you're creating.

If smoking is not allowed in this unit, check the box that says **Non-Smoking**.

If the unit still needs to be cleaned, uncheck the box that says **Cleaned**.

> ### *Note:*
> *If you haven't entered anything in the field for the title and the ID, the program will make a suggestion based on the object's ID and the unit type. You can edit those at any time. Please make sure to add a number behind the title and ID of units of the same type (e.g. C-WL:SB1, C-WL:SB2, etc.).*

5. After you are done editing the rentable unit, press **Save**. This will close the window for the **Rentable Unit** and the window for the **Object Management** will be shown again. In this window, your rentable unit is still selected and the information about it are shown in the right area of the window.
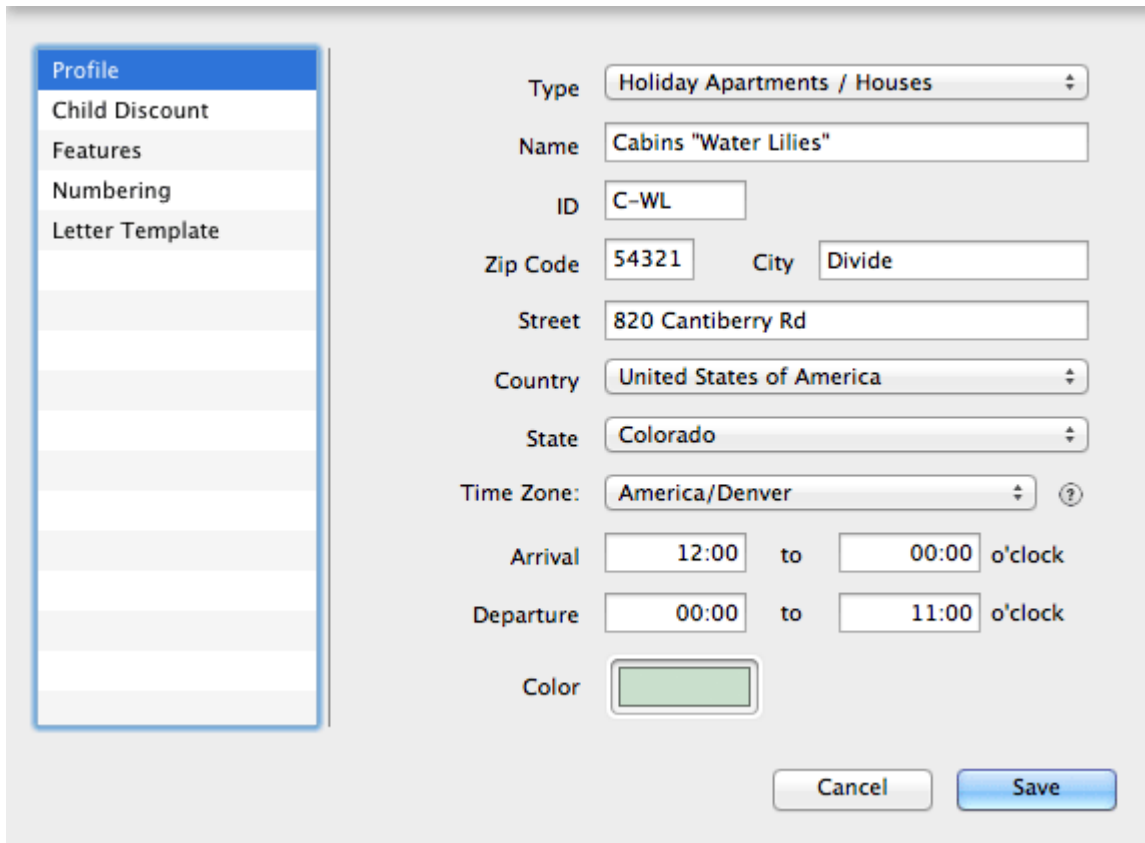
6. Close the **Object Management** window. This will show the reservation schedule in the main window with the new and updated rentable units.

> ### *Note:*
> *The prices that you have entered in the unit's profile are base prices. In the Price Administration you can add **seasonal prices** very easily.*

Delete rentable unit

1. Open the Object Management.

2. Go to the area **Rentable Unit**.

3. Select the unit that you want to delete and then press the button ⊟.

You can only delete units if it contains no bookings in the present or future.

Manage custom unit types

If the default unit types in Lodgit Desk are not enough for you, you can also add your own unit types.

1. Open the Object Management.

2. Go to the area **Rentable Units**.

3. Select the rentable unit for which you need a new unit type and open the window for the rentable unit by pressing the 🖉 button.

4. In the drop down menu "Type", select the item **Manage customised unit types**:
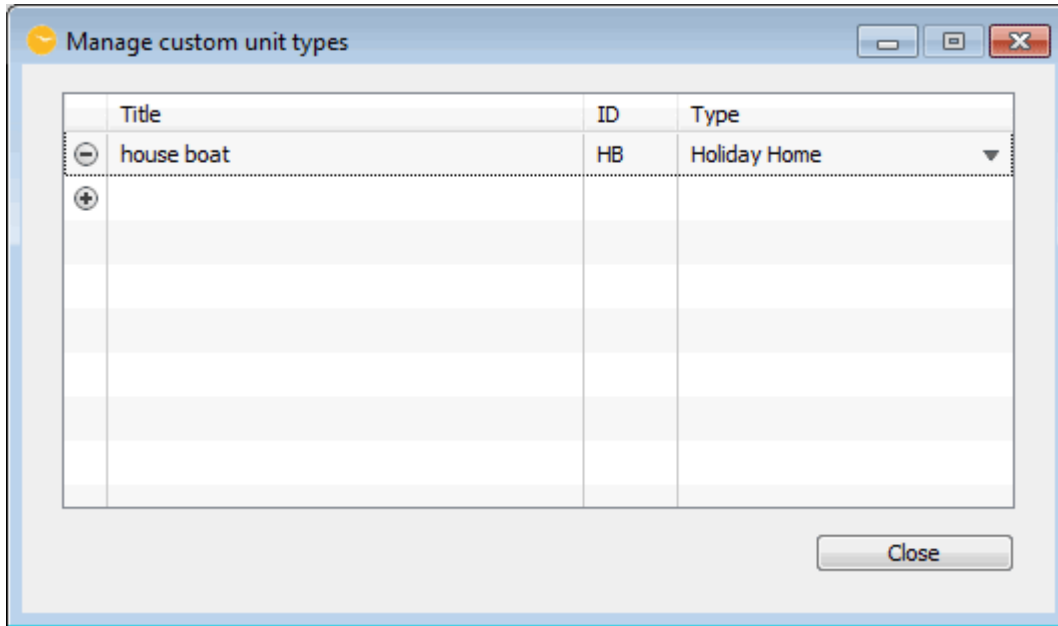
5. A new window will open where you can add new unit types by pressing the ⊕ symbol, add a title for it, an ID and select a base type. If there is no base type that you will fits, you can select "Other".

USE DIFFERENT LETTER TEMPLATES FOR YOUR OBJECTS   UP   EDIT RENTABLE UNIT INFORMATION

Edit rentable unit information

To edit the data for a rentable unit or add more information, go to the Object Management und and go to the area **Rentable Units**.

Select the rentable unit that you want to edit in the **Object Management** and double-click it or press the ✎ button.

This will open the **Rentable Unit** window.

In the left list in the window **Rentable Unit**, you can select the item that you want to edit:

- Profile
- Features
- Cleaning
- Short Description
- Link packages to a unit permanently
- Packages bookable online
- Print Options
- Statistics

Clicking on one of the items will open a new area on the right where you can add your information.

After you are done editing the rentable unit, press **Save**. This will close the window for the **Rentable Unit** and the window for the **Object Management** will be shown again. In this window, your rentable unit is still selected and the information about it are shown in the right area of the window.

CREATE AND DELETE RENTABLE UNITS   UP   EDIT UNIT'S PROFILE

Edit unit's profile

1. Open the unit you want to edit by going to the **Object Management,** then going to the **Rentable Units**, selecting the unit and clicking the Edit button.

This will show the unit's profile.

2. Edit the data and then click **Save** or select a different item from the left list that you might want to edit.

> *Note:*
> *Please make sure you understand the Definitions of the unit categories when selecting the unit type!*

Select/edit color for the unit

Every rentable unit can be shown with a custom color in the reservation schedule.

1. In the profile of the rentable unit, activate the "Color Code", by checking the box next to it.

2. By clicking on the color field you will open a window where you can select the color you like.

3. The color you have selected will then be the unit's color in the reservation schedule.

WL HH 01	1/8	🖬	
WL HH 02	1/5		
WL HH 03	1/6	🖬	
WL HH 04	1/5	🖬	🖬
WL HH 05	1/10		
SL HA 01	1/4	🖬	🖬

Note:

The object's color will be shown in a small sliver at the far left of the unit to symbolise the unit's affiliation to the object.

EDIT RENTABLE UNIT INFORMATION   UP   DEFINE FEATURES FOR A RENTABLE UNIT

Define Features for a Rentable Unit

1. Open the rentable unit you want to add features to by going to the **Object Management,** then going to the **Rentable Units**, then selecting the unit and pressing the ✎ button.

2. Select the list item **Features** in the left list.

3. To add features to the rentable unit, select them in the left catalogue listing the available features. You can select single features or several at the same time.

If you want to select several features that are next to each other at the same time, simply click and drag the mouse cursor over them. You could also select the first list item, then hold the SHIFT key and selecting the last item. This will select not only the first and last item, but all the ones in-between as well.

If the features are not next to each other, select the first feature and then hold down the CTRL key (Windows) or the CMD key (Mac OS X) whenever selecting another item.

4. A click on the right arrow button ` > ` will send the selected features in the left catalogue to the right one.

Note:
If you want to delete features that are no longer relevant or that you have added accidentally, select them in the right catalogue and press the left arrow button
< *to send them back into the left catalogue.*

5. You can use the selected features for all rentable units in one object or use the selected features for all units of the same category in one object by checking the boxes that say so.

6. After you are done editing the rentable unit, press **Save**. This will close the window for the **Rentable Unit** and the window for the **Object Management** will be shown again. In this window, your rentable unit is still selected and the information about it are shown in the right area of the window.
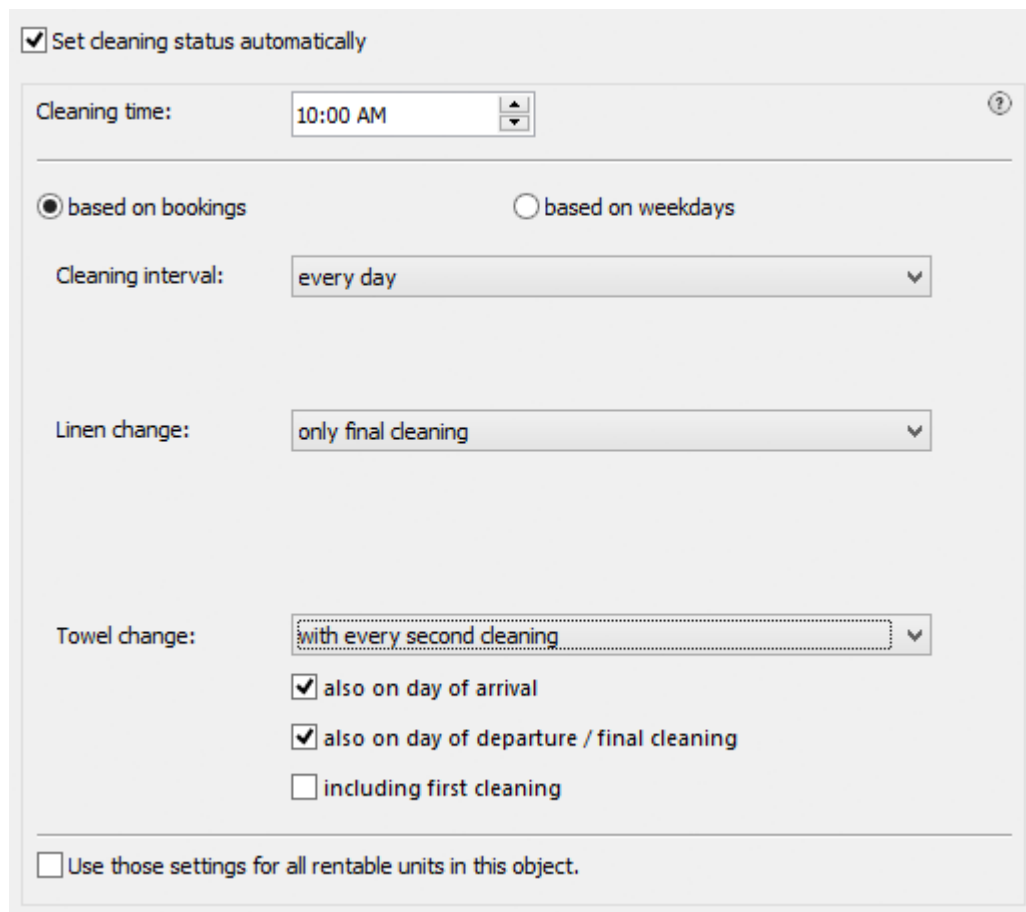
EDIT UNIT'S PROFILE   UP   AUTOMATICALLY CHANGE THE CLEANING STATUS OF A RENTABLE UNIT

Automatically change the cleaning status of a rentable unit

You can set up specific cleaning intervals for each unit and use those settings for generating a cleaning list. This change from the previous status of "Cleaned" and "Linens changed" will only happen when the unit is occupied.

1. Open the rentable unit you want to add features to by going to the **Object Management,** then going to the **Rentable Units**, then selecting the unit and pressing the ✎ button.

2. Select the list item **Cleaning** in the left list.

Check the box that says **Set cleaning status automatically** if you want to use the automatic cleaning status change. Uncheck it if you don't.

The **Cleaning time** is the time of day that the rentable unit is usually being cleaned at.

You now have two options for the cleaning interval: it can either be set **depending on the bookings** or **depending on the days of the week**.

If you select a **cleaning interval dependant on bookings**, the unit will only be

cleaned whenever there's a booking in it.
You have the options from "daily" to "weekly" as well as "on arrival", "final cleaning" or "on arrival and final cleaning".

The **towel and linen change** can then be set according to the cleanings (e.g. "with every second cleaning") or according to the booking days (e.g. "every two days"). Here, you also have the options "on arrival", "final cleaning" or "on arrival and final cleaning", and you can select combinations (e.g. "also on arrival").

If you select a **cleaning interval dependant on weekdays**, the unit will be cleaned on specific days regardless of whether it is occupied or not.

You also have the options for an additional cleaning on arrival and/or departure. The towel and linen change can be set separately.

> *Tip:*
>
> *If a rentable unit is set to the status "Needs Cleaning", the symbol 🧺 will show in the cleaning column next to the rentable unit in the reservation schedule. There's also a cleaning list you can print out for your personnel.*

The checkbox **Use those settings for all rentable units in this object** allows you to apply these setting to all the rentable units in this object which saves you time.

When the rentable unit was cleaned (and the linens changed) you have to set the status to "Cleaned" manually in the reservation schedule. Doing that will ensure the cleaning change interval to work correctly the next time.

DEFINE FEATURES FOR A RENTABLE UNIT   UP   ADD SHORT DESCRIPTION FOR A RENTABLE UNIT

Add short description for a rentable unit

The short description will be used on prints of offers and confirmations and is supposed to tell the future guest the most important things about the rentable unit.

The text length is limited to **a maximum of 400 characters**.

1. Open the rentable unit you want to add a short description to by going to the **Object Management,** then going to the **Rentable Units**, then selecting the unit and pressing the ✎ button.

2. Select the list item **Short Description** in the left list.

3. Add your **short description** in the text field in the right area.
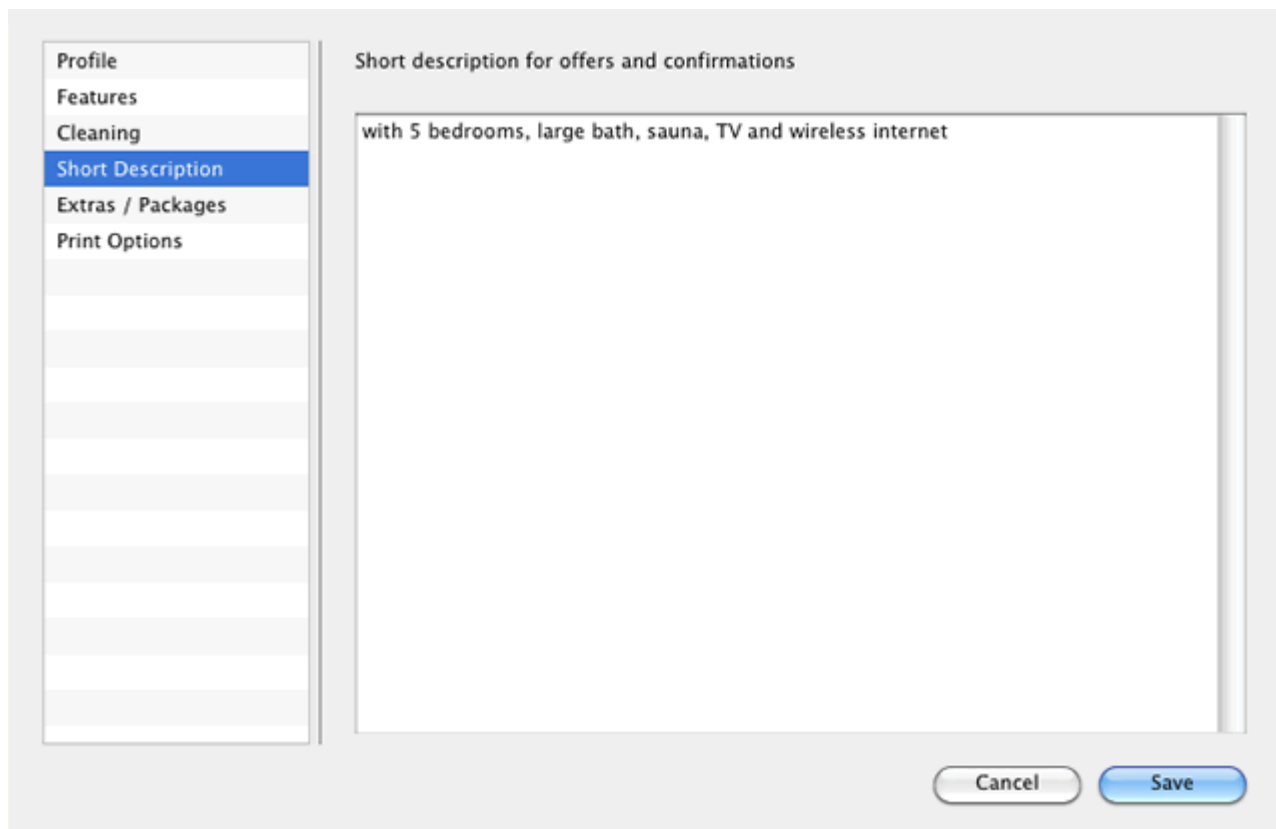
4. After you are done editing the rentable unit, press **Save**. This will close the window for the **Rentable Unit** and the window for the **Object Management** will be shown again. In this window, your rentable unit is still selected and the information about it are shown in the right area of the window.

Link package to a rentable unit

Under Packages you can add certain extras automatically to each booking in a rentable unit. To do this, you have to **link the package**, that contains the extras that are to be added to the bookings automatically, **permanently to a rentable unit.** This is recommended for extra services such a breakfast or final cleaning.

1. Open the rentable unit you want to link a package to by going to the **Object Management,** then going to the **Rentable Units**, then selecting the unit and pressing the ✏ button.

2. In the left list, select the list item **Extras / Packages**.
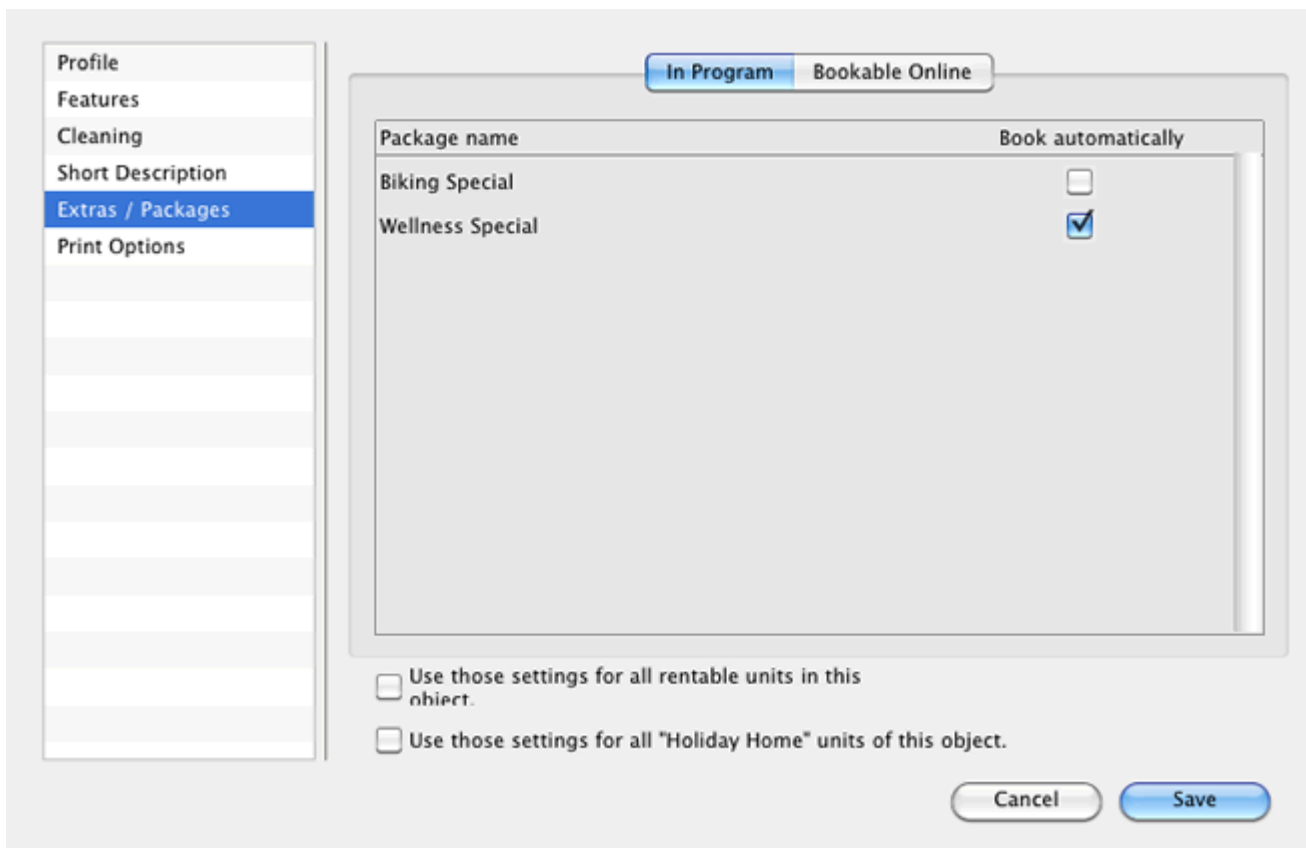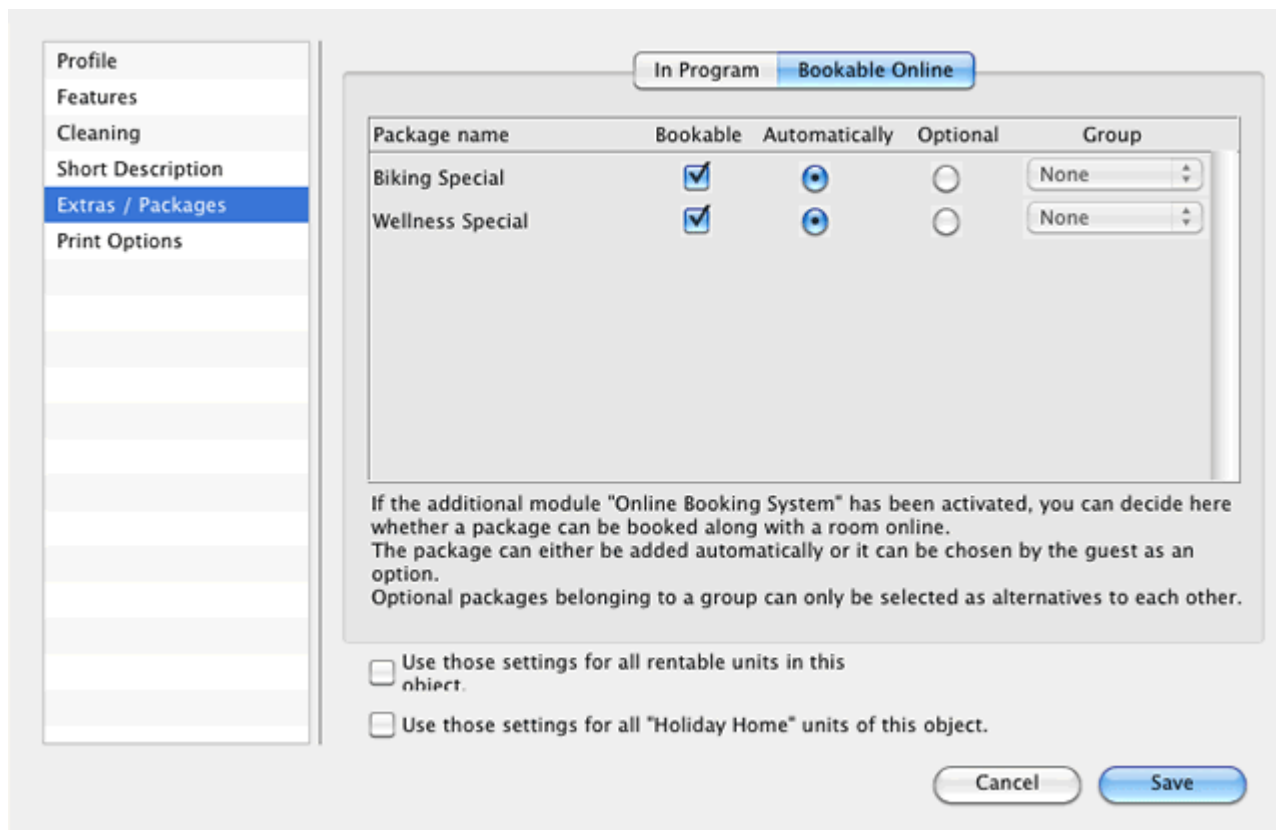
3. In the area **In Program,** link packages to the unit by checking the box **Book Automatically**. These packages will then be added to each new booking in this unit automatically.

4. After you are done editing the rentable unit, press **Save**. This will close the window for the **Rentable Unit** and the window for the **Object Management** will be shown again. In this window, your rentable unit is still selected and the information about it are shown in the right area of the window.

Optional: packages bookable online

If you have a license for the additional module "Online Booking System" you can define packages (see Create Package) to be bookable online. This means, they will be offered to the future guests that book online during the booking process along with the rentable units.

1. Open the rentable unit you want to edit by going to the **Object Management,** then going to the **Rentable Units**, then selecting the unit and pressing the 🖉 button.

2. Select the list item **Extras / Packages** in the left list and then go to the **Bookable Online** area. This is where you can select the packages that will be booked along with the rentable unit online by checking the box that says "Bookable".

3. You can also decide, whether the package will be added **automatically** or whether the guest can choose to book it or not:

> Adding a package **Automatically** is often useful for extras such as Food&Drink. If, for example, you always offer your units with a breakfast, you can create a package with the extra "breakfast" and then automatically add it to bookings made online.

> If you select the **Optional** way, it will add another step to online bookings where the guest can book the package if they want to.

> **Note:** If a package has been made an Inklusive item it is always added automatically and marked "Inclusive".

4. If you add optional packages to a **Group**, then the packages can only be selected as alternatives to each other (for example: a group called "board" can contain the packages "half-board" and "full-board", from which the guest can then select one). If you don't add the packages to a group, the guest can select all the packages they want.

5. After you are done editing the rentable unit, press **Save**. This will close the window for the **Rentable Unit** and the window for the **Object Management** will be shown again. In this window, your rentable unit is still selected and the information about it are shown in the right area of the window.
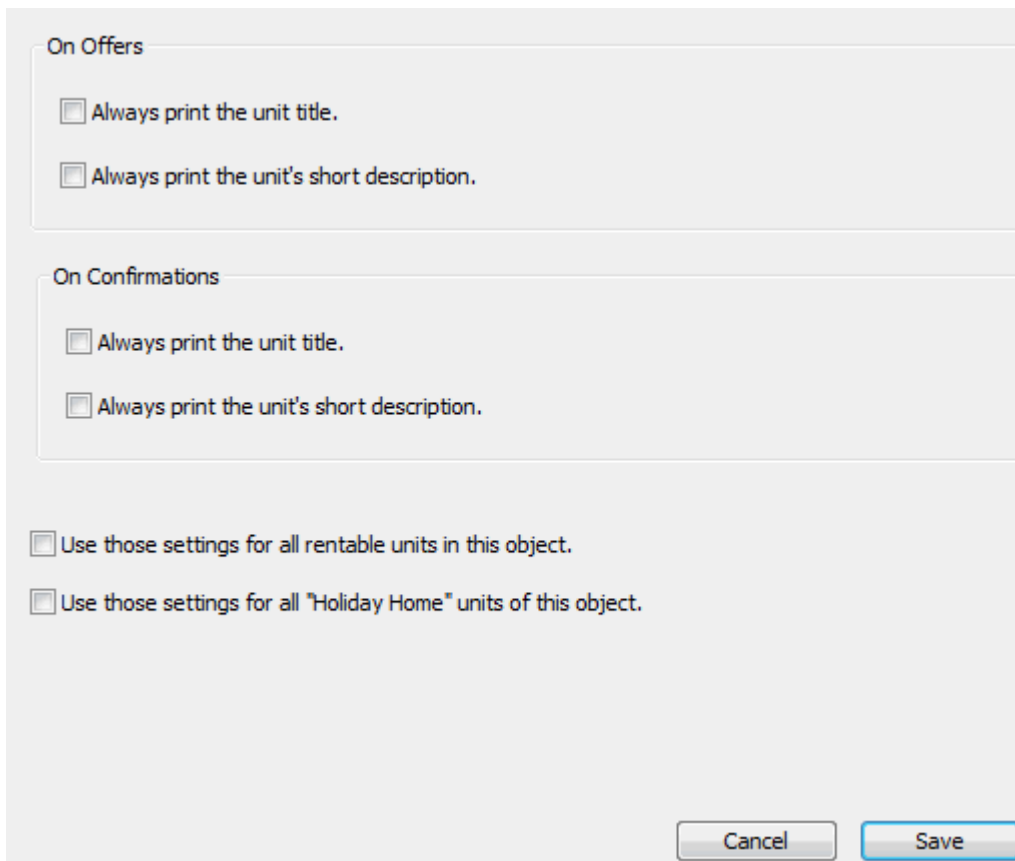
LINK PACKAGE TO A RENTABLE UNIT   UP   DEFINE PRINT OPTIONS

Define print options

1. Open the rentable unit you want to edit by going to the **Object Management**, then selecting the unit in the **Rentable Units** list and then pressing the button [✎].

2. Select the list item **Print Options** in the left list.

3. Here you can decide if you want to always print the unit's title and/or short description on offers and/or confirmations.

4. You can also decide, whether these selections are to be used for all rentable units in the object or for them to be used on all rentable units of this type in the object.

Important: If you check either one of these boxes, already existing preferences in other rentable units might be overwritten.

OPTIONAL: PACKAGES BOOKABLE ONLINE   UP   STATISTICS OPTIONS

Statistics preferences

1. Open the unit you want to edit by going to **Object Management > Rentable Units**, selecting it and pressing the button Edit .

2. In the left list, select the item **Statistics**.
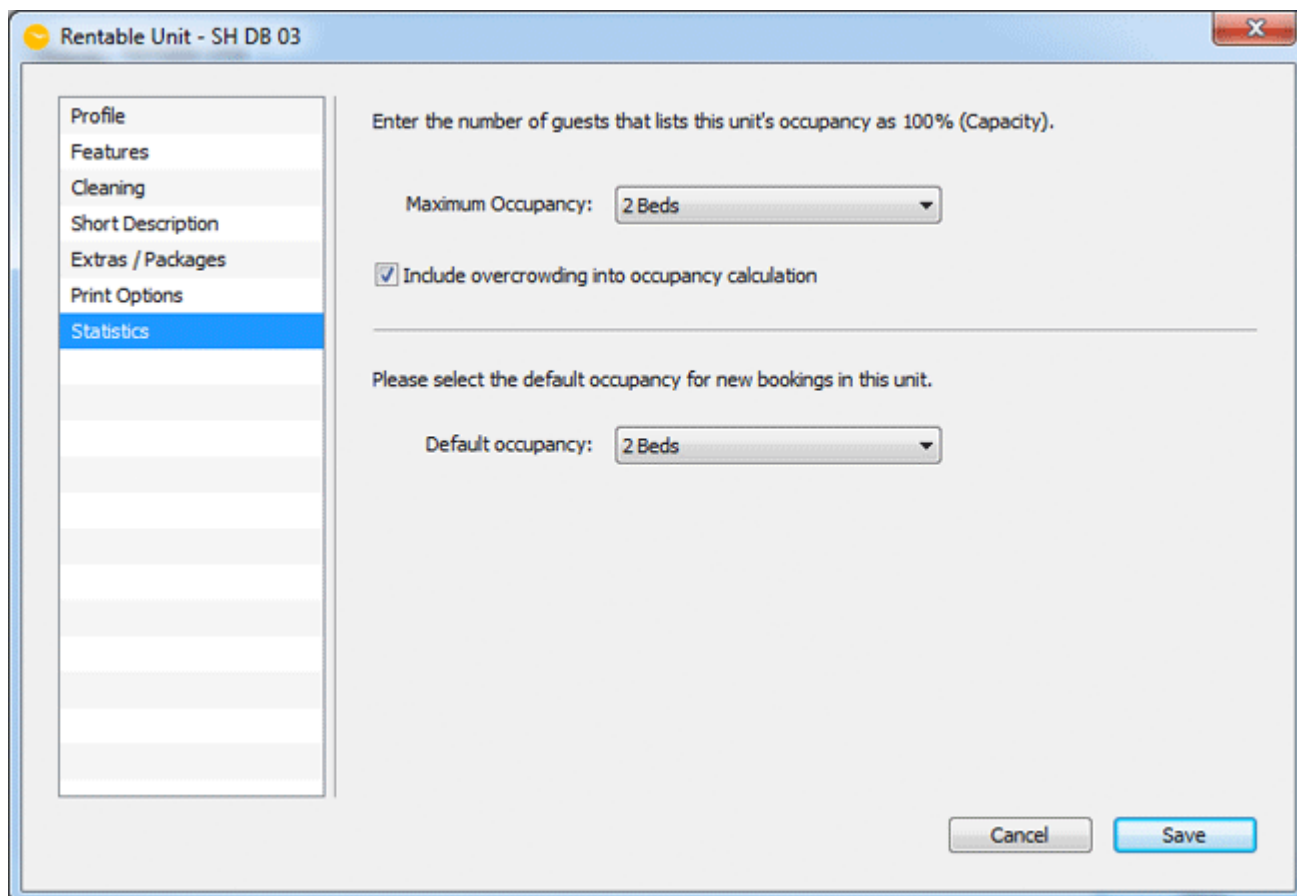
Maximum occupancy

Here you can decide **how many beds must be occupied for the unit to be listed as 100% occupied in the statistics**. The default setting is that all beds must be occupied. If you want your unit to be listed as 100% occupied even when there's only one bed occupied (e.g. you offer double bedrooms as singles, too), select the number in the drop down menu.

If you have selected a lower bed number, the overcrowding of the room can be taken into account for the statistics. For example, if there are two people sleeping in that double bedroom, the occupancy would be listed as 200%. To activate this, please check the box.

Default occupancy

When drawing in a new booking into the reservation schedule, this number will be used for the number of arriving guests.

DEFINE PRINT OPTIONS   UP   NOTES

Notes

If you enter a note for the rental unit here, a blue information symbol appears in the list of rental units on the left side of the occupancy plan behind the name of the rental unit. If you move the mouse over the symbol, the note entered here is displayed as a tooltip.
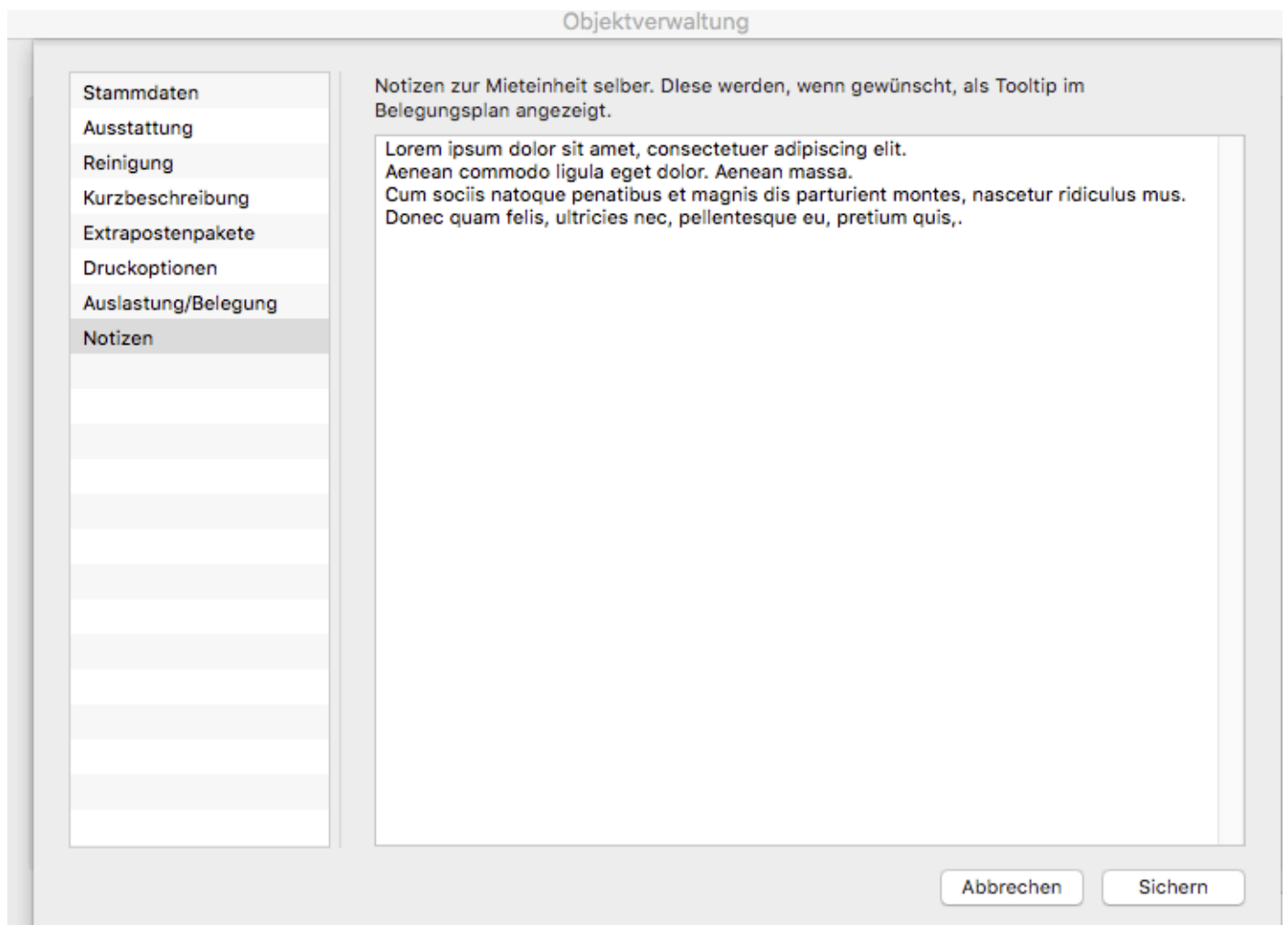
STATISTICS OPTIONS   UP   AUTOMATICALLY ADD A CITY TAX TO EACH NEW BOOKING

City/Accommodation tax for a rentable unit

If have generally have a lot of guests that require you to pay a city or accommodation tax, you can link the tax to a rentable unit and all new bookings in that unit will have the tax added automatically.

Go to **Administration > Objects and Rentable Units > Rentable Units** and open the unit by double-clicking on it. Then go to **City Tax**:
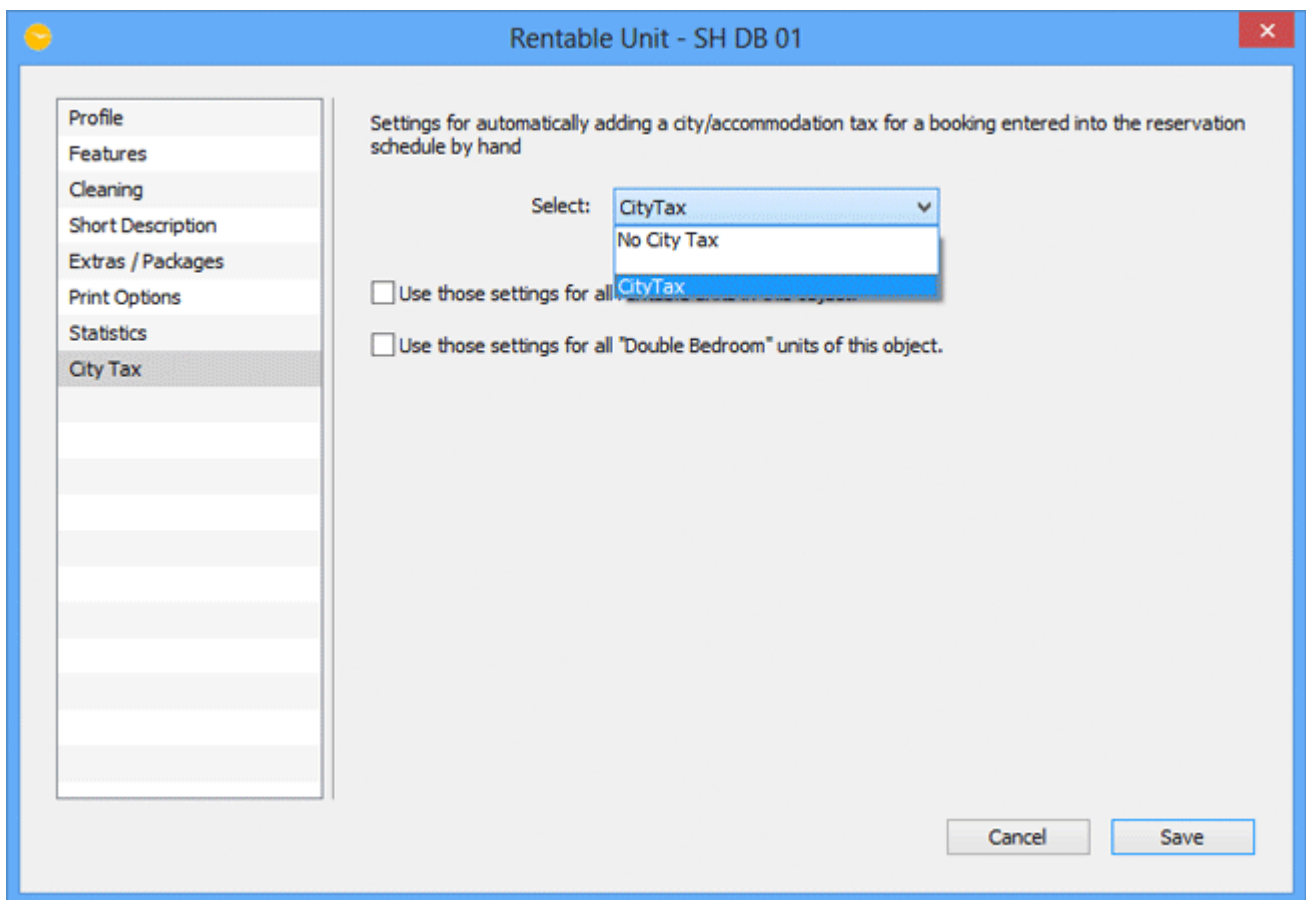
Here you can select one of the taxes you have previously created.

You can check the box to instantly apply these setting to all units of that object or all units of that type in that object.

To save your settings, click **Save**.

Attention: The item **City tax** is not displayed in the list if it has not been activated. You can configure that feature in the General settings.

NOTES   UP   EXTRAS & PACKAGES

Extras and packages

Extras are all services that are being billed separately from the accommodation and are usually added to the booking manually. Aside from extras such as breakfast or half-board, you can also define **visitor's tax** or **extra beds** to be extra items. You can organise your extras by putting similar extras in a **category folder**.

Packages always consist or one or more extra items that you have put into a package to make it easier for you to add them to a booking.

Examples for using packages:

- **Specials/Arrangements:** A package for a Christmas special could include a 4-course-dinner and a horse sleigh ride at night.
- **Complete packages:** Inclusive services that are often offered by hotels, such as breakfast (garni), half-board or full-board.

Create, edit and delete extras

In the menu bar, go to **Administration > Extras and Packages > Extras**, or click the Extras button above the reservation schedule, or use the keyboard shortcut **CTRL+Shift+Z**.

This will open the window **Extras and Packages**.
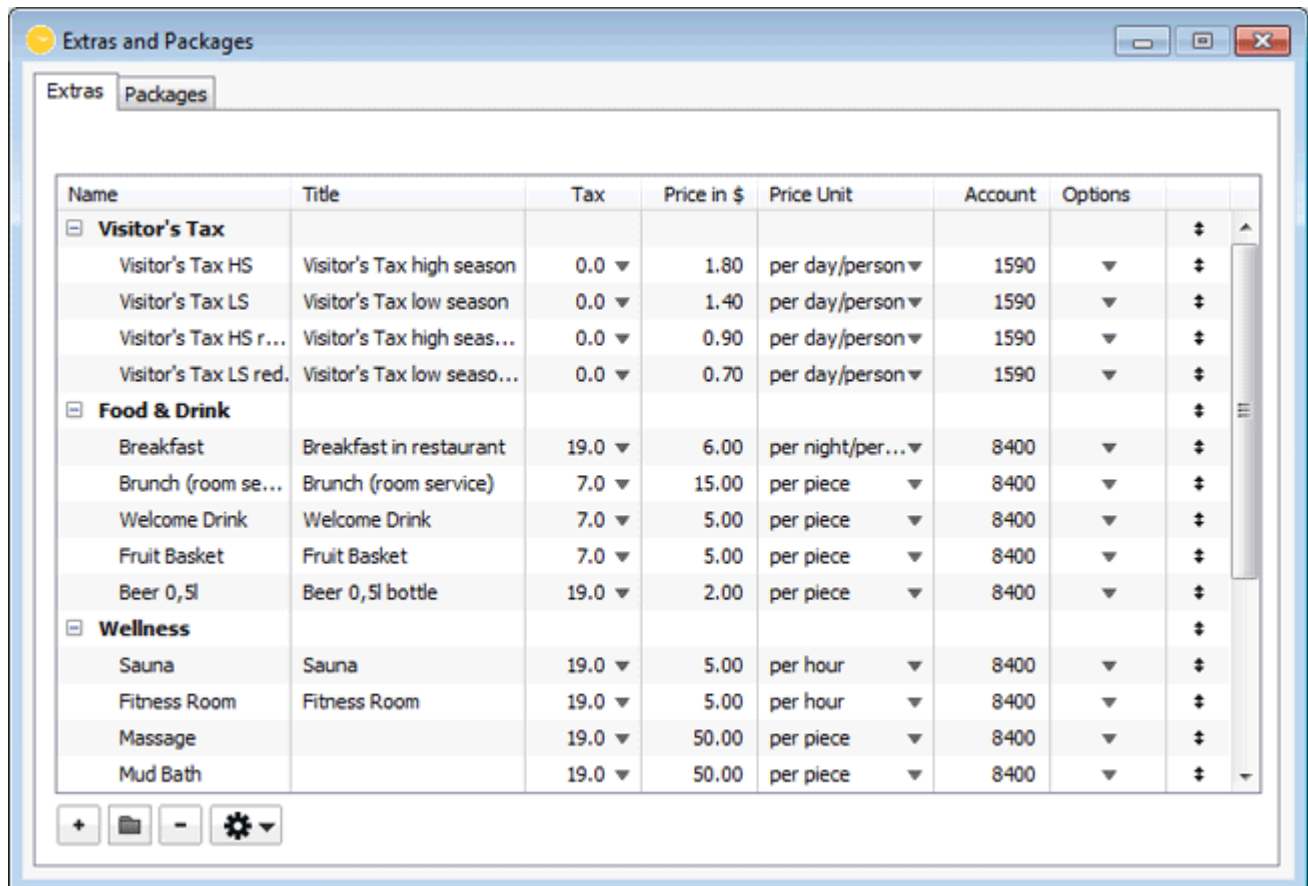
Here, you have the following options:

- Create new extras
- Edit extras
- Delete extras
- Put extras in a category folder
- Import extras
- Update extras in existing bookings

Create new extras

1. Open the window **Extras and Packages** and go to **Extras**.

2. Press the plus symbol ⊞ and create a new extra. Add a name, description, price,

price unit, tax rate and account number.

> ### Note:
> *If you have already selected an extra (e.g. Visitor's Tax HS), the new extra will be put directly below it. You can move extras around by clicking and dragging the double-arrow at the far right.*

3. In case you have selected the price units "per night" or "per night/person", you can also decide whether the service will be provided on the arrival or the departure date.

✓	Not on arrival date
	Not on departure date

This is important for a correct daily Extras List. For example, breakfast usually isn't provided on the arrival date, whereas dinner usually isn't provided on the departure date.

4. If you have selected a price unit that takes the number of guests into consideration, you can also specify that the price is automatically adjusted when the number of guests is changed in the booking window.

✓	Adjust number of guests when editing the booking

5. You can also specify for all extras whether their dates will be adjusted automatically whenever a booking's dates are changed.

✓	Adjust time settings when editing the booking

6. Whenever you leave a list column, the data will be saved.

Tip: You can add **extras** with **negative amounts**, so that you can add **discounts** or **credits** to a booking easily!

> ### Note:
> *Every extra can be made an **inclusive item** in the booking window or in a package. This means, its price will be **added to the accommodation price** and it won't be listed as an extra.*

Edit extras

1. Open the window **Extras and Packages** and then go to **Extras**.

2. Select the extra you want to edit from the list.

3. Edit the entry as you please. When you leave a field/row/column, your entry will be saved automatically.

> ### Note:
> *When it comes to "Visitor's Tax", you can only edit the **description** and the **price**.*

Delete extras

1. Open the window **Extras and Packages** and then go to **Extras**.

2. Select the extra you want to delete from the list.

3. Press the button [-]. The selected extra will then be deleted.

Put extras in a category folder

You can organise your extras by putting **similar extra items** (e.g. breakfast, dinner) into a **category folder** (e.g. Food & Drink).

1. Open the window **Extras and Packages** and go to **Extras**.

2. Press the folder button [📁] and create a new category with a significant name.

3. Move the extras you want to move into this folder by clicking and dragging their double-arrow on the far right side of the list. While you are dragging an item, a bold line will appear that will help you put your extra in the right place.

Import extras

You can import extras from a CSV file into the Extras Management. In the Actions menu, go to **Import extras (CSV)…**

Import

Please review the content you want to import and adjust the text coding until all characters are displayed correctly.

Text coding: Macintosh

Separated by: ; Text Separator: "

☑ Bundle imported extras to new category: Extra Services for Holiday Homes

In the first row of the list, you can allocate the columns to the corresponding fields in the Extras Management.

	A	B	C	D	E	F
	Name ▼	**Title** ▼	**Tax** ▼	**Price in €** ▼	**Price Unit** ▼	**Account** ▼
	name	**title**	**tax**	**price**	**unit**	**account**
	Linens	Linens & Sheets	17.5	5	per night/piece	0
	Stocked fridge	Fridge Stocked On Arrival	17.5	15	per piece	0
	Barbecue use	Use of Barbecue Area	17.5	0.75	per hour	0
	Utilities	Utility Use	5	2.00	per day/person	0
	Final cleaning	Final Cleaning	17.5	22.50	per piece	0

Cancel   OK

Select the text coding of the CSV file first. In the list below, you'll find a preview of what it will look like once imported into the Extras Management. You may have to adjust the coding to display symbols correctly.

During import, you can also bundle the extras into a new category.

The first row of the table lets you select the columns. With the small arrow on the right of each cell, you can select the value of the column.

Clicking the button **OK** will import the extras into the software and add them to the end of your existing list.

> **Important:**
> *The first line of your CSV file (displayed in bold) will not be imported. Make sure that this line is either empty or contains header information only.*

Field Descriptions

Please note the following assignments for the fields of the CSV file:

Name   Enter the name of the extra item here.

Labelling   Enter the description of the extra item here.

VAT   The VAT rate as a number. This is only a reference to a VAT rate stored in the settings.

Price in € The gross price of the extra item as a number.

Price unit
The price unit from Lodgit Desk.
This must be written exactly as in Lodgit Desk, since this is also a reference to a price unit existing in Lodgit Desk. You cannot create your own price units.

Account   The accounting account to which the extra item is to be assigned.

Export extra items

You can also export extra items from within Lodgit. This will save the list of your extra items as a csv file. To do this, click on the cogwheel menu and then go to Export extra items (CSV)... A window opens for saving, in which you can define the storage location. After you click on Save, another window opens for format settings. Keep the default settings or make your individual settings and click OK.
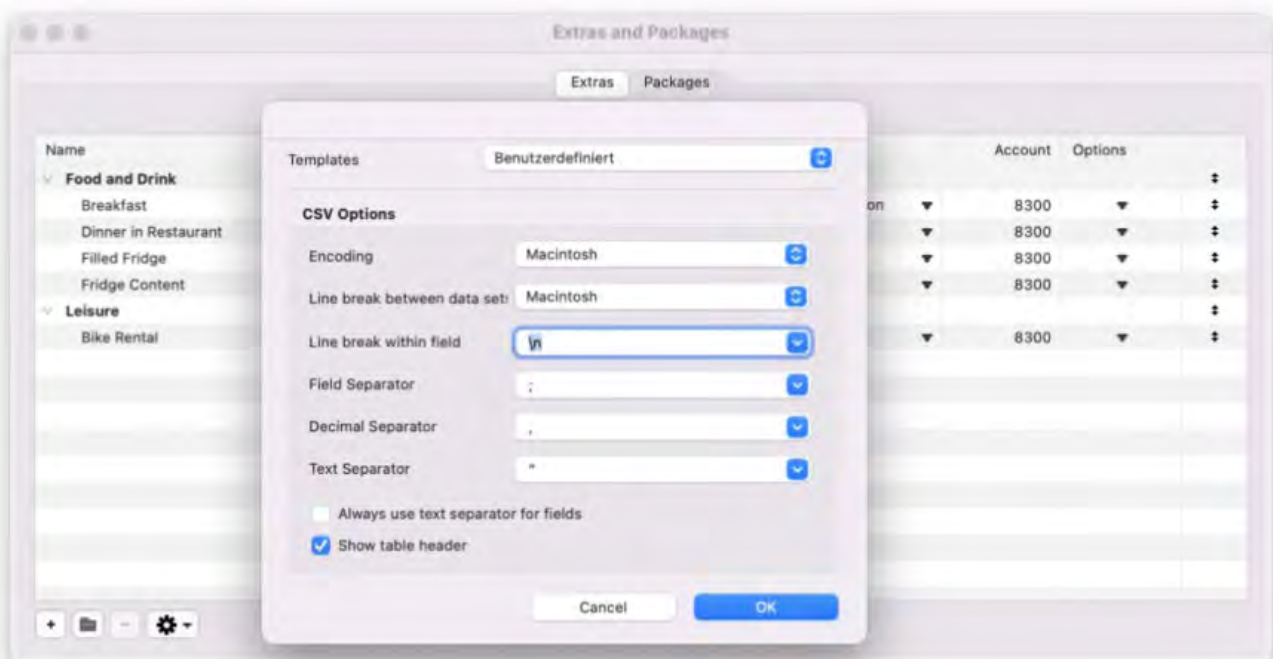
Update extras in existing bookings

If you have to update the information of extras in existing bookings (e.g. if there was a tax reform), you can use the menu item "Update extras in all bookings" in the Actions menu. This will update all extras in current bookings and substitute the current values in the Extras Management if needed. You don't have to update each extra manually.

1. Open the window **Extras and Packages** and go to **Extras**.

2. Go to the Actions menu ⚙️▾ and select the item "Update extras in all bookings". This will open the window for the update options:
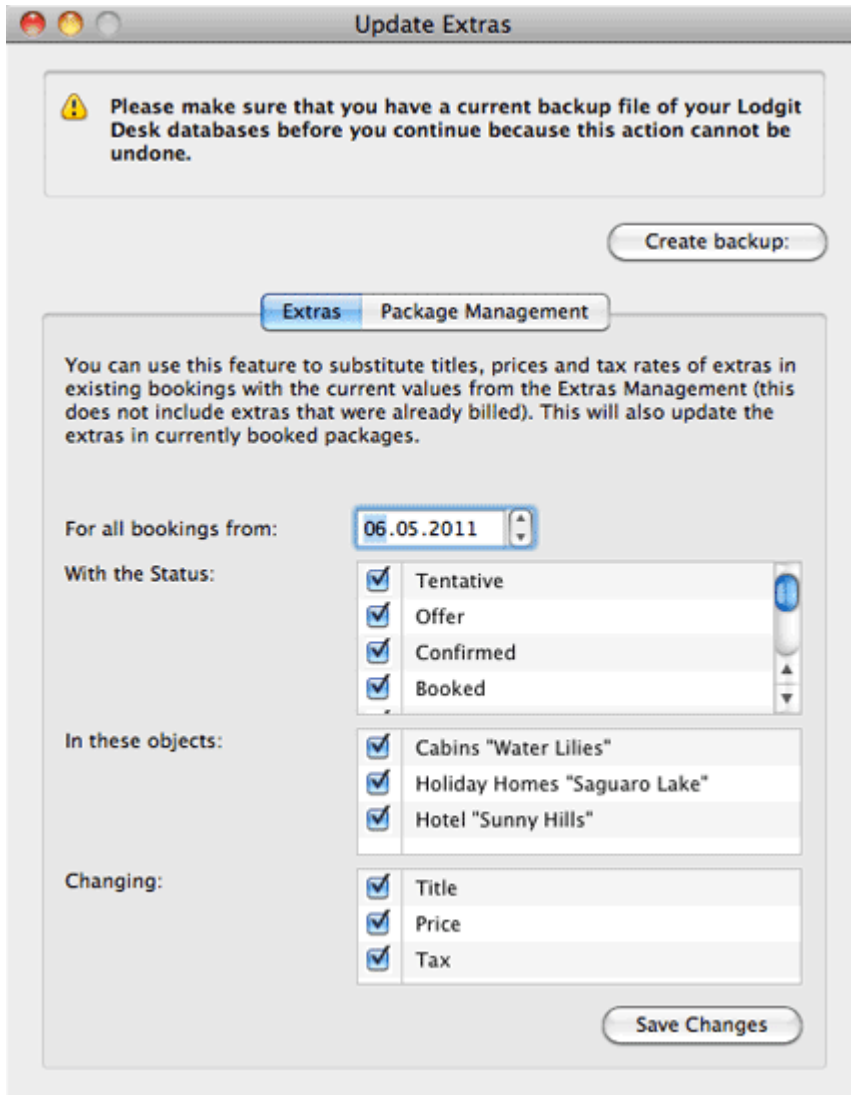
3. Specify here, which kind of bookings you want to update. You can also define, what the starting date for these changes are and which objects to update.

4. Also specify which values you want to update. You update the tax rate, description and price.

5. Start updating the bookings by pressing the button "Save Changes".

EXTRAS & PACKAGES   UP   CREATE, EDIT, DELETE PACKAGES

Add, edit and delete packages

In the menu bar, go to **Administration > Extras and Packages > Packages**, or click on the **Extras** button at the top of the reservation schedule (keyboard shortcut **CTRL+Shift+Z**). This will open the window **Extras and Packages** and show the section **Packages**.
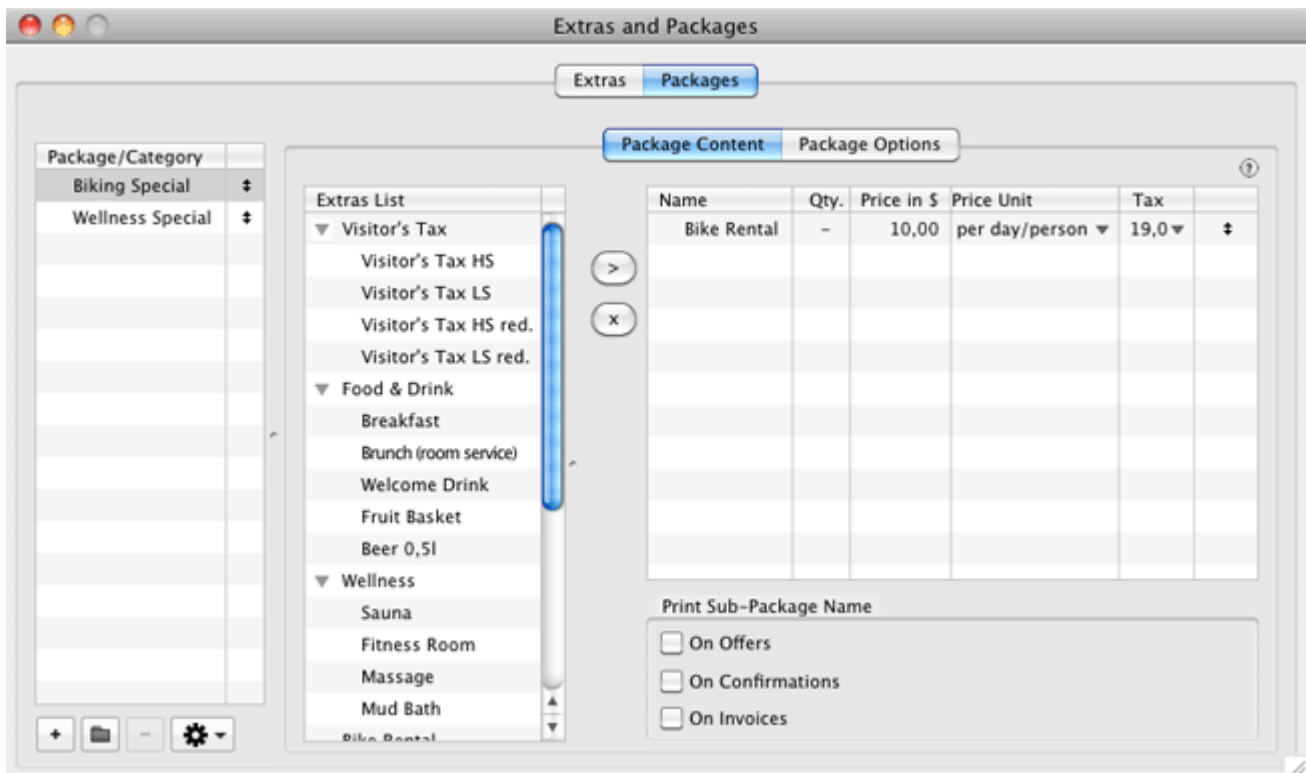
You now have the following options:

- Add new package
- Add new category / put packages in categories
- Edit packages
- Delete packages
- Update extras in existing packages

Add new package

1. Click the **plus symbol** ⊕ in the left package list and then add a new package with a significant name.

2. On the right side, you can now add extras to the package by selecting them in the list and pressing the arrow button. If you select them in the right list and press the x-button, you can delete them from the package.

> **Note:**
> *You can also add **sub-packages** by scrolling to the bottom of the extras list. Those sub-packages allow you to organise your packages and put similar extras into a*

folder. You can print the names of sub-packages on offers, confirmations and invoices if you have checked the respective boxes.

Note:

You can move extras around within a package by clicking and dragging their double-arrow on the right side!

---

3. Changes will be saved automatically.

Add new category and put packages therein

1. Click the **folder symbol** and add a new category.

2. Click and drag a package into the new category. Sorting packages into categories can be especially helpful, when a lot of packages are offered.

Edit packages

1. Select a package that you want to delete in the package list. Add more extras by selecting them in the extras list and pressing the arrow button. Delete extras from the package by selecting them in the package table and pressing the x-button.

2. All changes will be saved automatically.

Delete packages

1. Open the window **Extras and Packages** and go to **Packages**.

2. Select the package that you want to delete in the list.

3. Press the button ⊖. The selected package will be deleted.

Update extras in existing packages

Just like you can update all extras in existing bookings you can also use the Actions menu to update the information of extras in all existing packages.

1. Open the window **Extras and Packages** and then go to **Extras**.

2. From the Action menu select the item "Update extras in package management". This will open the window for the update options:

3. Specify which values you want to update (tax rate, price and price unit).
4. Start the update by pressing the button "Edit".

Note:
*Adding packages to a booking manually can be done in the booking window. You can also automatically book packages to a booking by **linking the package to the rentable unit**. This can be helpful for default services such as breakfast.*

CREATE, EDIT, DELETE EXTRAS   UP   PACKAGE OPTIONS

Package options

In the menu bar, go to **Administration > Extras and Packages > Packages**. You can also press the button **Extras** at the top of the reservation schedule (keyboard shortcut **CTRL+Shift+Z**). This will open the window **Extras and Packages**, where you should go to the **Packages** area.

Now select **Package Options**.
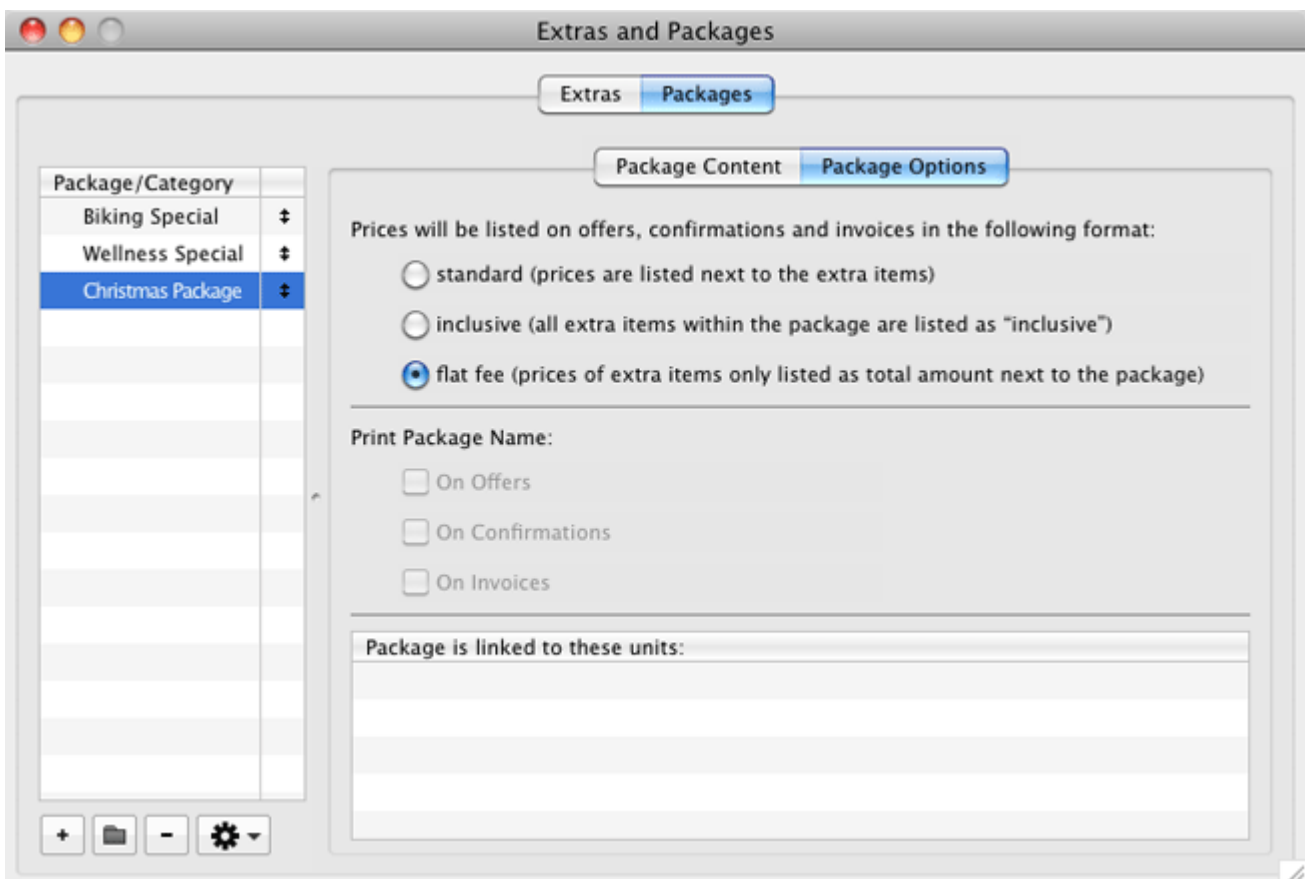
Here, you can define how the prices for extras in this package will be displayed on offers, confirmations and invoices:

- **standard:** The price each extra item will be listed right next to it.
- **inclusive:** The prices for all extras in this package will be added to the accommodation price and will not be listed with the package itself. If the extras are listed, the word "inclusive" will appear in the price column.
- **flat fee:** The total price of all extras will be listed next to the package name. If the extras are listed, only the amount/quantity will be listed.

You can also specify whether the name of the package will be listed in the services on offers, confirmations and invoices. For **standard packages**, extras will be listed regardless of whether the package name is displayed. For **inclusive packages**, you can decide in the invoice window whether you want to list the extras separately or not. **Flat fee packages** always have to display the name, which is why in this case, the area will be greyed out.

You can also see a list of rentable units that the selected package is linked to. Linked packages will automatically be added to new bookings created in these rentable units.

next: Add, edit and delete packages

CREATE, EDIT, DELETE PACKAGES   UP   CREATE AND MANAGE PRICE LISTS

Create and manage price lists

To create and manage price lists, go to **Administration > Prices** in the menu bar or press the buttons **Prices** above the reservation schedule.

This will open the window for **prices**.
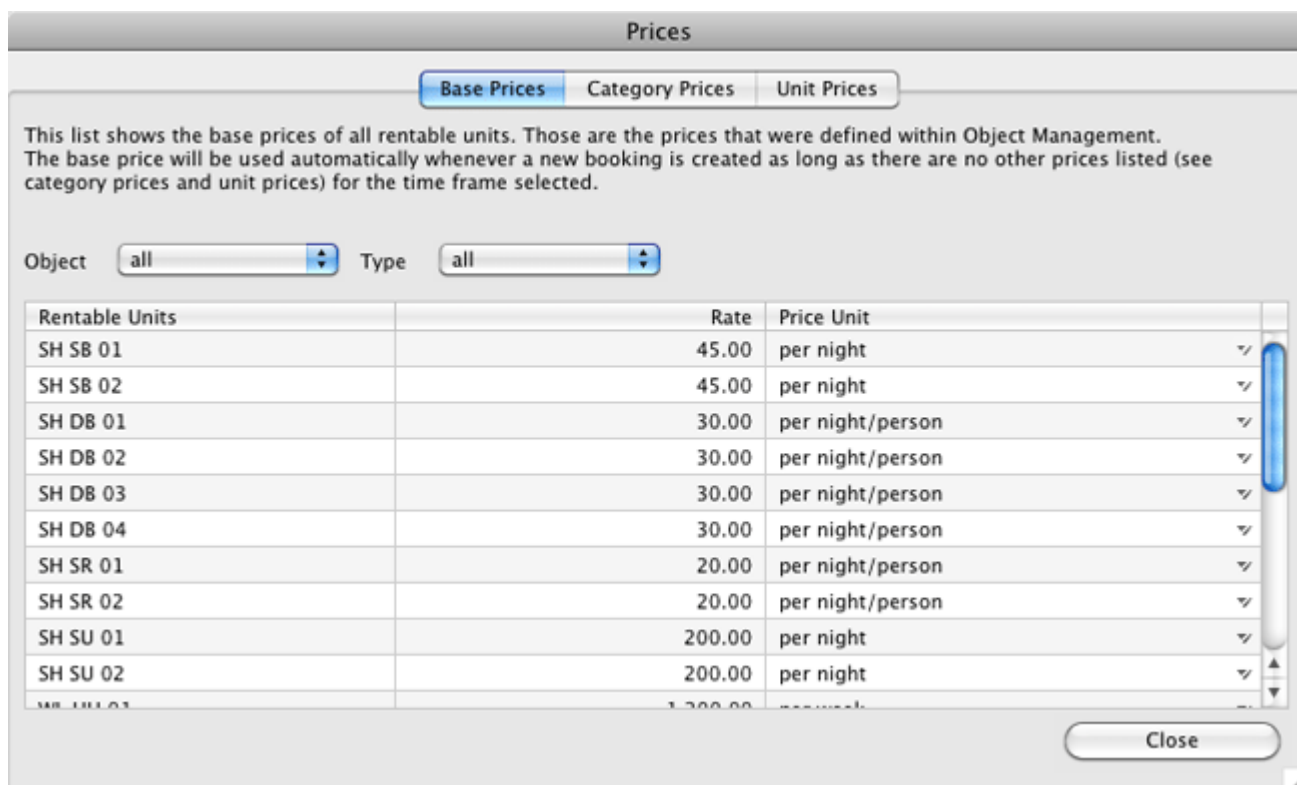
Note:
Changes in the price lists are not automatically transferred to existing bookings. You can apply the changes to an existing booking by using the cogwheel symbol in the booking window and choosing "Substitute price with new price data from Price Administration".

Here you can do the following:

- Manage base prices
- Define category prices
- Define unit prices (list)

PACKAGE OPTIONS   UP   MANAGE BASE PRICES

Manage base prices

When you create a rentable unit, the price you have entered will automatically be used as the base price and will be sent to the Price Lists as **Base Prices**. These prices will be used when there are no other prices for this unit in the other lists (category prices and unit prices).

You can view the **Prices** for one or all objects and unit types.

In this list, you can also edit the base price and price unit for single units. These changes will be applied to the unit's profile in the **Object Management** as well.

To edit the **price unit** for the selected rentable unit, click on the arrow to the right in the price unit field and select the price unit.

To edit the **base price**, select the unit, click into the price field and enter the new price.

CREATE AND MANAGE PRICE LISTS   UP   DEFINE CATEGORY PRICES

Define category prices

If you want to define prices **for unit types** during a certain time frame, for a particular number of guests or for a certain length of stay (and the price is different from the base price), you can do so in the Price Lists under **Category Prices**. Whenever a new booking is created and Lodgit Desk finds a price for the selected unit in this list, it will use this price instead of the base price.

You can view the **Prices** for one or all objects and unit types.

To add a new entry, press ⊕.

The fields with the small triangles are drop down fields.

Select the object, unit type and price unit. Then specify the time frame, price and the minimum number of guests required for the use of this category price.

For example, you add a category price for double bedrooms and enter "2" into the field **min. Guests**. Now, for every booking in a double bedroom in this object with more than one guest, this category price will be used.

You want a double room to be able to be occupied as a single room and the price changes depending on the occupancy. For your double rooms, you must have created an occupancy with one person as the basic price beforehand. For the double room category, enter 2 for >**min. Guest**, enter the corresponding changed <Rate and the <Price Unit. Now this price is always used if a double room is occupied by more than one person.

Another example: You want to decrease the price of a room category if the guest stays longer than three nights. In this case you enter the timeframe (Date from / to) for which this price should be valid (e.g. the entire current year or until any desired point in the distant future), the value "3" in the "min. Nights" field and the desired rate. Now, for every booking in the respective category which is longer than three nights, this category price will be used.

All fields can be edited, which means you can constantly edit the information.

To delete an entry, click on its ⊖ button.

To make things easier for you, you have the option to **Duplicate** the entries. You can decide whether you want to duplicate the entry entirely, or if you want to duplicate the entry, but change the dates to the next year. This can help you create seasonal prices each year without having to add the category prices again from scratch.

Using the Assistant to create Category Prices

To make it easier to create category prices we have added an Assistant. This will allow you to quickly enter the following prices:

- rates depending on the weekday
- rates depending on the number of guests
- seasonal rates
- any combination of those mentioned above

Click on the Actions menu in the lower left corner and select **Assistant...** to open the assistant.

Before you begin to add your prices, please take a look at the following 'filters' and pre-settings:

1. The **time frame** during which the prices are valid (usually up to 1 year, e.g. June 6 2015 to July 31 2015 for low season rates)

2. The **Objects or Categories** that the prices are valid for

3. The **price unit** for the prices you want to add (e.g. per night/person). You can only pick one price unit during each session; for a different price unit open the Assistant again.

4. Whether the prices should **depend on weekdays** (e.g. because you have different rates on the weekend than within the week)

5. **Which weekdays** you want to add prices for (e.g. if you only want to add prices for the weekEND right now, uncheck the boxes for Monday through Friday)

6. The **number of guests** you now want to add prices for; those numbers are minimum numbers, so if you want to only add a seasonal price uncheck all numbers except 1 and the price there will count for all bookings with at least one guest

Now you can enter the prices for the time frame you selected, for example:

With these settings you'll add the following prices: During the time of **June 1 2015 until July 31 2015** the rates for the selected category **for 1 person** from **Monday through Thursday** is **$42 per night**. From **Friday through Sunday** the rate is **$45 per night**. For **2 or more guests** the rate from **Monday through Thursday** is **$80 per night** and from **Friday through Sunday** it is **$85 per night**.

After you've entered all the rates, click **Add Prices** and the Price Management will be filled with the according entries.

Manage base prices   Up   Define unit prices in the price lists

Define unit prices in the price lists

If you want to define prices **for units** during a certain time frame (and the price is different from the base price or the category price), you can do so in the Price Lists under **Unit Prices**.

Whenever a new booking is created and Lodgit Desk finds a price for the selected unit in this list, it will use this price instead of the base price or the category price.

You can view the **Prices** for one or all objects and unit types.

To add a new entry, press ⊕.

The fields with the small triangles are drop down fields.

Select the object, unit type and price unit. Then specify the time frame, price and the minimum number of guests required for the use of this category price.

For example, you add a unit price for a double bedroom and enter "2" into the field **min. Guests**. Now, for every booking in this double bedroom with at least two guests, this unit price will be used. If you have only one guests in a booking, the unit price does not apply, so the category price will be used (if you have added one for this unit type during the time frame). If there is no category price that applies, the base price will be used.

All fields can be edited, which means you can constantly edit the information.

To delete an entry, click on its ⊖ button.

To make things easier for you, you have the option to **Duplicate** the entries. You can decide whether you want to duplicate the entry entirely, or if you want to duplicate the entry, but change the dates to the next year. This can help you create seasonal prices each year without having to add the unit prices again from scratch.

Using the Assistant to create Unit Prices

To make it easier to create unit prices we have added an Assistant. This will allow you to quickly enter the following prices:

- rates depending on the weekday
- rates depending on the number of guests
- seasonal rates
- any combination of those mentioned above

Click on the Actions menu in the lower left corner and select **Assistant...** to open the assistant.

Before you begin to add your prices, please take a look at the following 'filters' and pre-settings:

1. The **time frame** during which the prices are valid (usually up to 1 year, e.g. June 6 2015 to July 31 2015 for low season rates)

2. The **Units** that the prices are valid for

3. The **price unit** for the prices you want to add (e.g. per night/person). You can only pick one price unit during each session; for a different price unit open the Assistant again.

4. Whether the prices should **depend on weekdays** (e.g. because you have different rates on the weekend than within the week)

5. **Which weekdays** you want to add prices for (e.g. if you only want to add prices for the weekEND right now, uncheck the boxes for Monday through Friday)

6. The **number of guests** you now want to add prices for; those numbers are minimum numbers, so if you want to only add a seasonal price uncheck all numbers except 1 and the price there will count for all bookings with at least one guest

Now you can enter the prices for the time frame you selected, for example:

Assistant for Adding Unit Prices							
Time frame: 01.06.2015 to 31.07.2015				Price unit: per night			
Units: Select				☑ Prices depend on weekdays			
min. Guests	☑ Mo	☑ Tu	☑ We	☑ Th	☑ Fr	☑ Sa	☑ Su
☑ 1	42,00	42,00	42,00	42,00	45,00	45,00	45,00
☑ 2	80,00	80,00	80,00	80,00	85,00	85,00	85,00
☐ 3							
☐ 4							
☐ 5							
☐ 6							
☐ 7							
☐ 8							
☐ 9							
☐ 10							

Cancel   Add Prices

With these settings you'll add the following prices: During the time of **June 1 2015 until July 31 2015** the rates for the selected unit **for 1 person** from **Monday through Thursday** is **$42 per night**. From **Friday through Sunday** the rate is **$45 per night**. For **2 or more guests** the rate from **Monday through Thursday** is **$80 per night** and from **Friday through Sunday** it is **$85 per night**.

After you've entered all the rates, click **Add Prices** and the Price Management will be filled with the according entries.

DEFINE CATEGORY PRICES   UP   BOOKINGS

Bookings

Create booking
Create (group) reservation with the booking assistant
Open booking
Change booking status to Booked
Change booking status to Checked In
Change booking status to Checked Out
Change booking status to Disabled
Edit booking time frame
Move booking to another unit
Split a booking (move into another unit)
Add a main contact to a booking
Edit price and/or price unit for a booking
Add an agent to a booking
Add child discounts to a booking
Add, edit and bill desposits for bookings
Add guests to a booking
Print registration form
Add extras to a booking
Delete extras from a booking
Add notes to a booking
View and print correspondence
Add a city/accommodation tax to a booking
Create group reservation
Remove from group reservation
Overview over the (group) booking
Edit the guest data of a booking
Delete booking

DEFINE UNIT PRICES IN THE PRICE LISTS   UP   CREATE BOOKING

Create booking

You have two options to create a new booking in Lodgit Desk:

- you can draw it into the reservation schedule,
- you can open a new booking window, or
- you can use the Booking Assistant to quickly generate a (group) booking.

Draw booking into reservation schedule

Click the button **Draw** . If you now hover your cursor over the reservation schedule, you will find that it is now a pencil symbol.

Click and hold the left mouse button in the unit you want and the arrival date, then drag to the right until you have reached the departure date for the booking. This will "draw" a booking with the status **Tentative** into the reservation schedule at the time you have specified.

After you have penciled in a new booking, the mouse mode automatically goes back to **Select**, so that you can open the booking window.

The **automatic switch back to the Select mode** after a new booking has been penciled in can be **deactivated temporarily** by **holding down the SHIFT key while drawing the booking**. This is especially helpful when drawing bookings for a group reservation.
This will keep the **Draw** mode active until you release the SHIFT key, or click the button **Select** at the top of the reservation schedule, or double-click on one of the recently drawn bookings.

Note:
Selected bookings can be duplicated in the reservation schedule. This is helpful when you have a guest that often comes back and books the same things, because duplicating a booking will also duplicate all the booked extras as well.

Create bookings in the booking window

Go to **Bookings > New...** This will open the booking window to create a new booking.

Enter the arrival and departure date in the booking window and select a unit. Please don't forget to add a main contact.

> *Note:*
> *When creating a new booking using the **New...** feature, the program will show your vacant and occupied units during the time frame you have specified. **Important:** The number of guests you have specified is also a factor in determining whether a unit is vacant, i.e. available for this booking.*

When you close the booking window, the new booking will be added automatically to the booking window.

BOOKINGS   UP   CREATE (GROUP) RESERVATION WITH THE BOOKING ASSISTANT

Create a (group) reservation using the booking assistant

In order to quickly generate a (group) booking, go to the menu bar item **Bookings** and select **New (with Booking Assistant)...**.
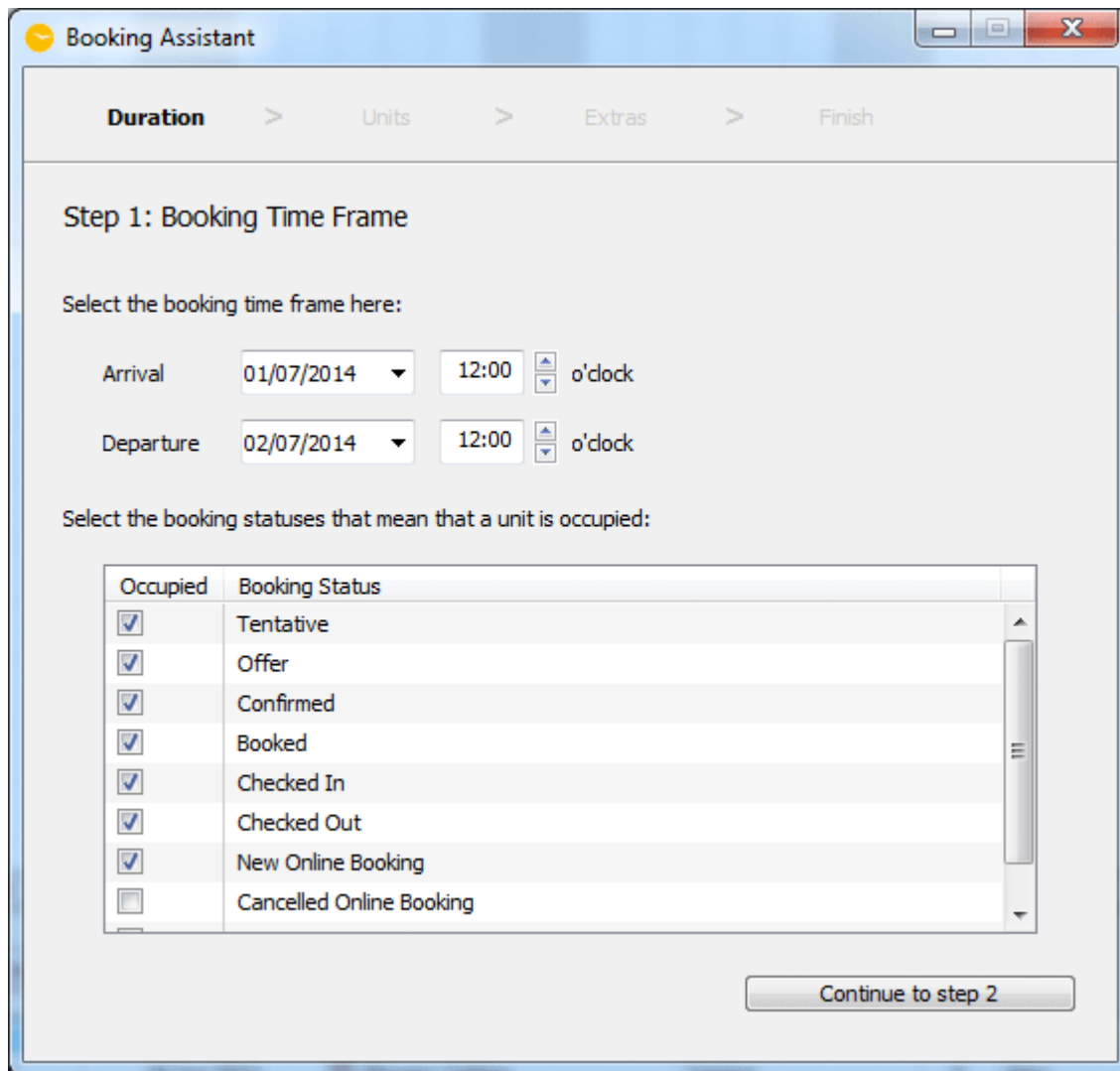
In the window that opens, select the time frame for the booking.

> **Note:**
> *It's not possible to create a group booking with bookings in different time frames using the Booking Assistant. To do that, create the bookings separately from one another and then put them into a group.*

Also select the booking statuses that will list a unit as "Occupied" for the time frame to avoid over-bookings.
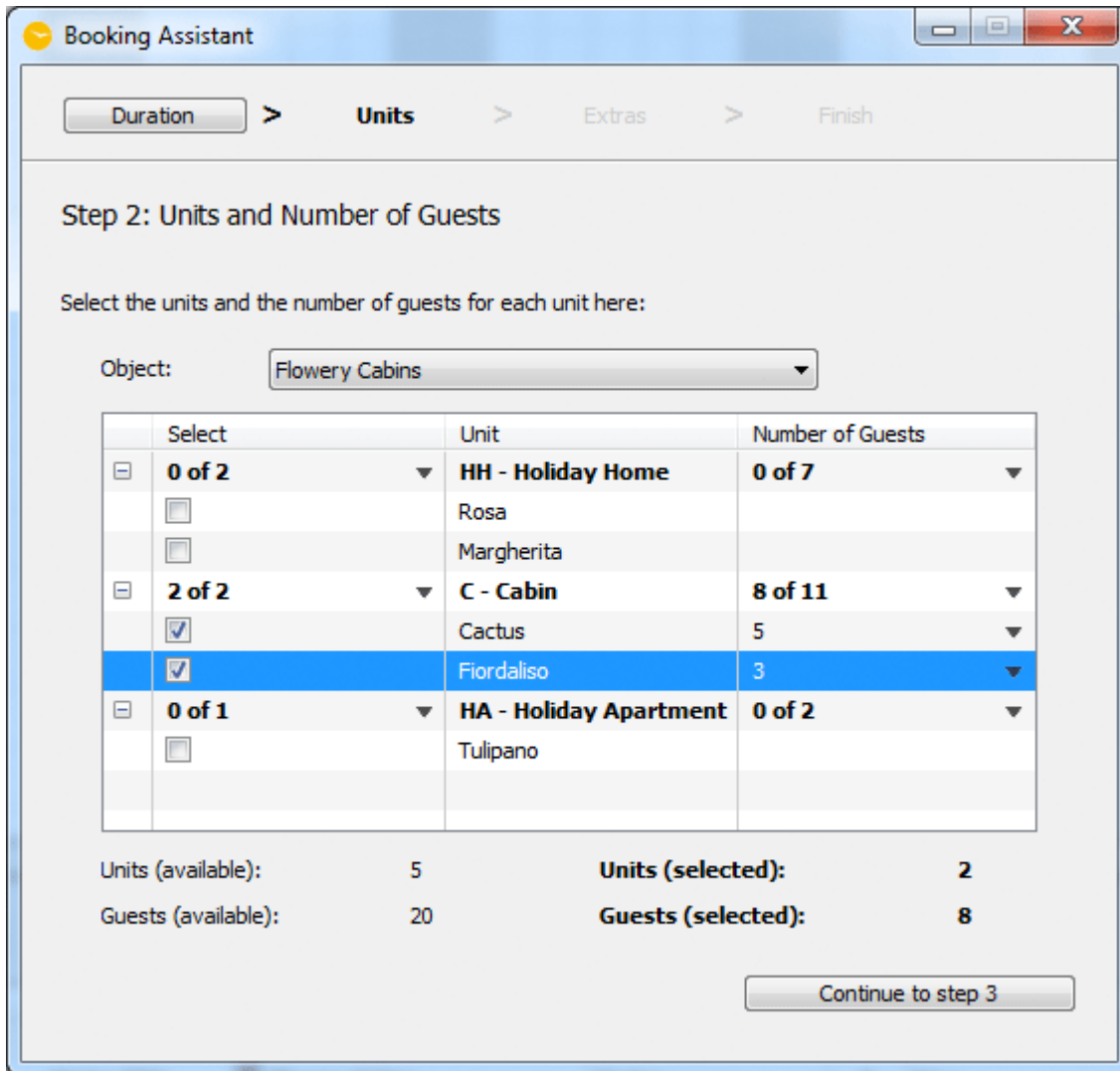
In step 2, you will now see a list of all vacant units. You can filter this list by a certain object.

Easily select the rentable units through:

- selecting the rentable units by checking the box,
- selecting the number of rentable units in a category by clicking on the arrow in the first column,
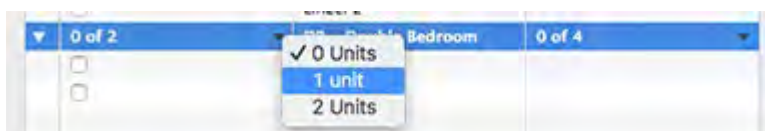
- selecting the number of guests by clicking on the arrow in the last column.
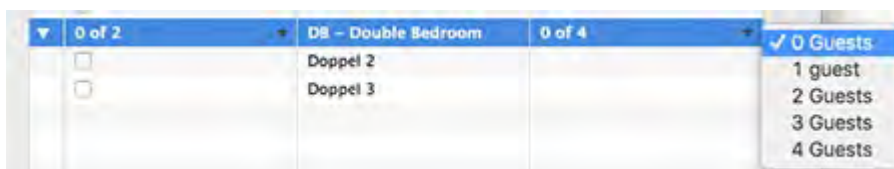
Below the list, you'll find how many units are vacant and how many guests you can theoretically accommodate at most. On the right side, you'll see what you've selected.
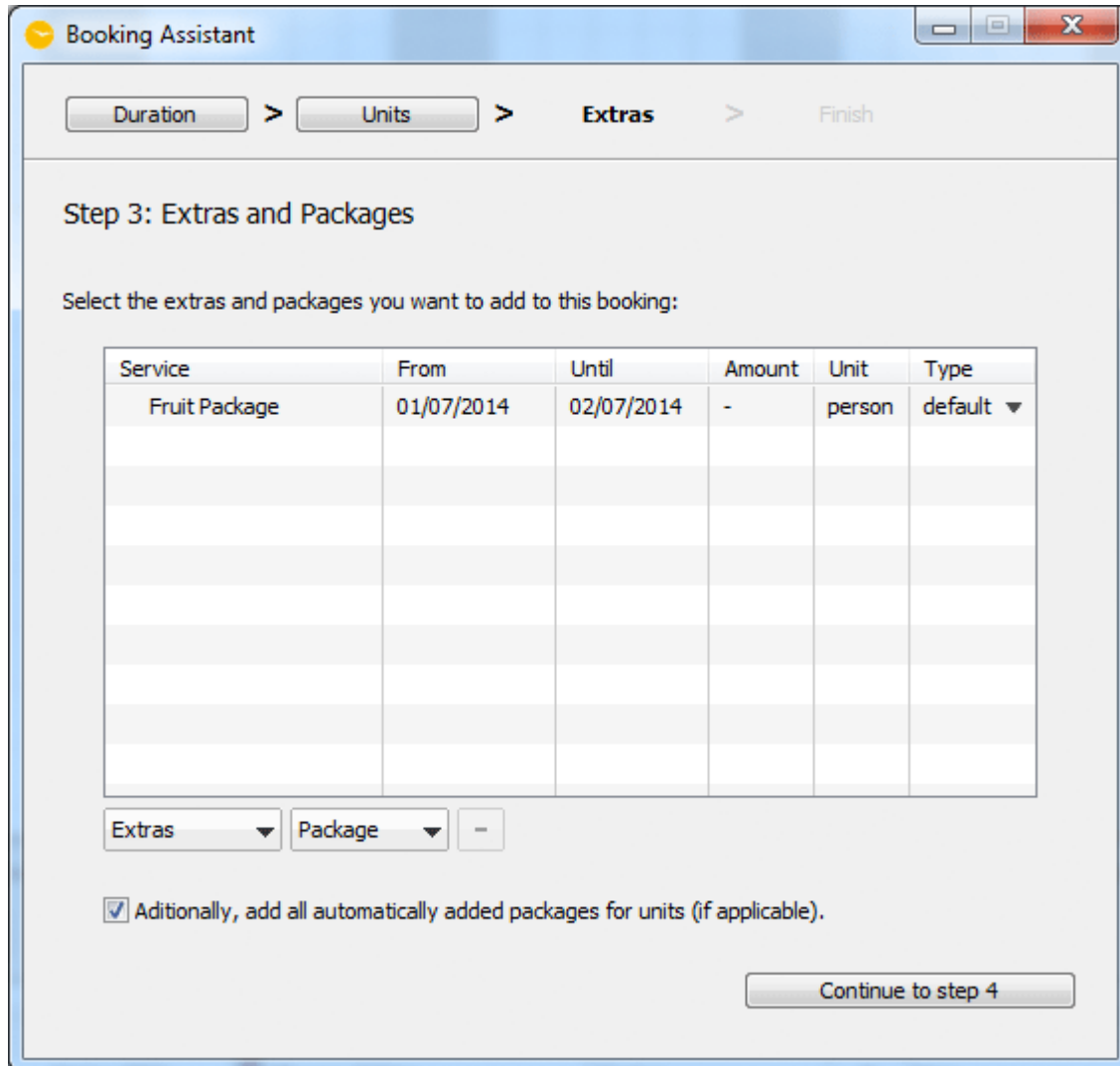
In step 3, you can select any extra services and/or packages you want to add to the bookings.

> **Note:**
> *Extras and Packages you select here will be added to all the bookings in this group. If you want to add certain extras and/or packages to single bookings, you can do that later in the respective booking window.*

If you want to ignore automatically added packages, de-select the option to have them added.
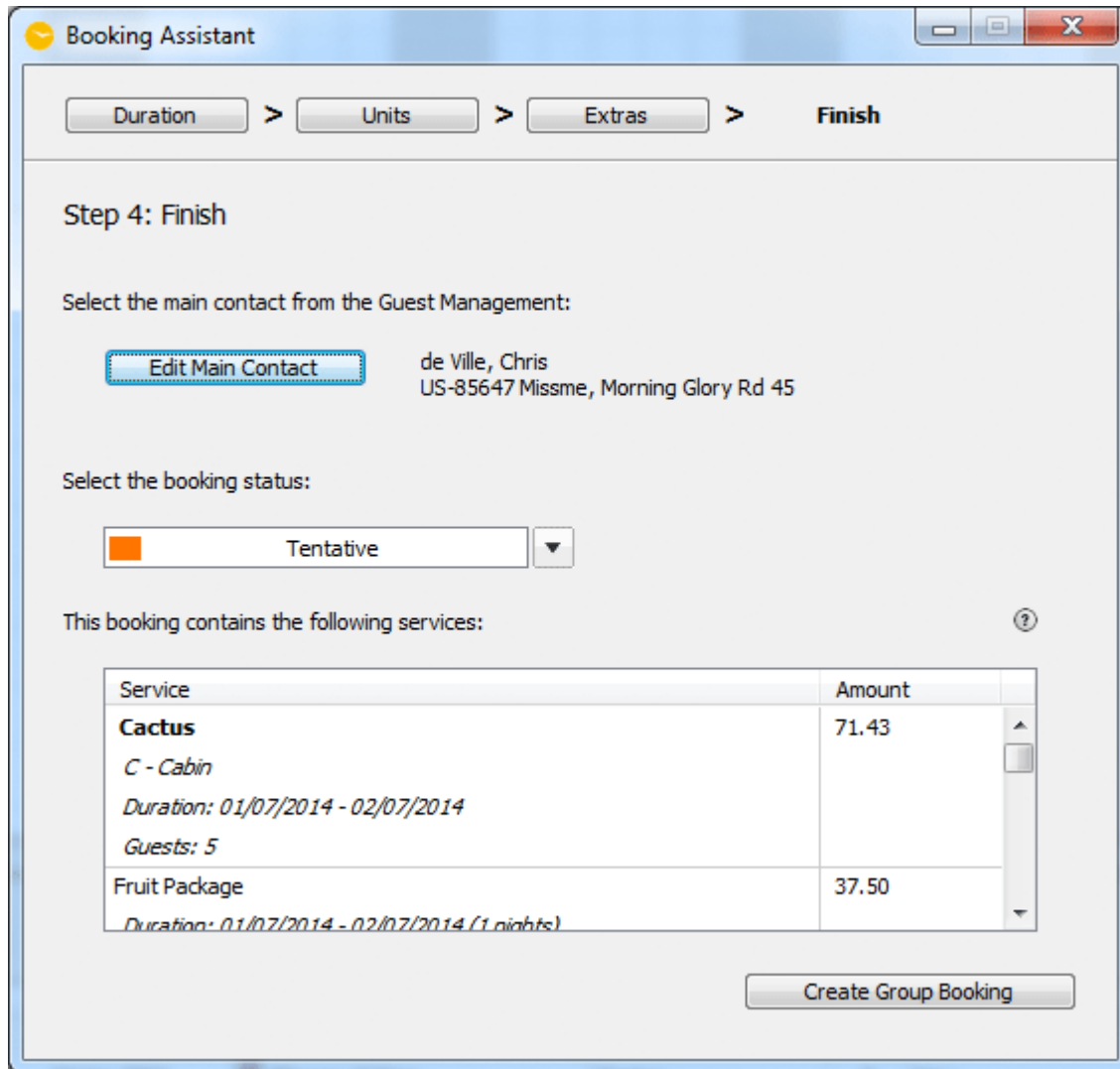
In the last step, you can select the main contact for the booking as well as the booking status. You'll also see an overview over all services and the end total.

Then press the button **Create Booking** or **Create Group Booking** to generate the new booking in the reservation schedule.

CREATE BOOKING   UP   OPEN BOOKING

Open booking

The action **Open Booking** will open the booking window.

1. Select the booking that you want to open.

2. Call up the context menu by right-clicking on it.

3. Select the action **Open Booking**. This will open the booking window.

Alternative:
*Select the booking you want to open, then go to **Bookings > Open Booking**, or use the short cut **CTRL+O**, or double-click on the booking. This will open the booking window.*

Change booking status to Booked

> ### *Note:*
> *Changing the status to **Booked** is only possible when you have added a main contact to the booking.*

Change booking status to Booked in booking window

1. Double-click on the booking you want to edit in the reservation schedule. This will open the booking window.

2. Select the status **Booked** in the drop down menu on the right side.
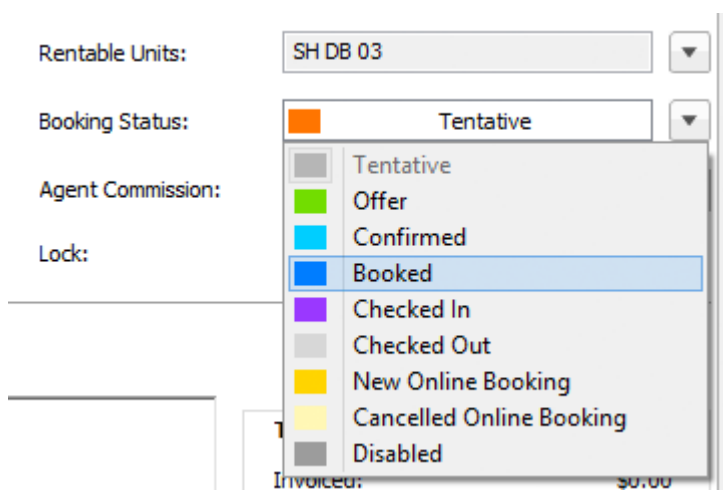
3. Close the booking window, this will change the booking's colour in the reservation schedule to the one that you have specified in the **Preferences** for **Booked** bookings.

Change booking status to Booked in reservation schedule

1. Select the booking that you want to edit and then call up the context menu by right-clicking on it.

2. Within the context menu, select **Change Status To > Booked**.

> ### *Alternative:*
> *Select the booking you want to edit in the reservation schedule and then go to **Bookings > Change Status To > Booked**.*

This will change the status of the booking and the booking's colour to the one you have specified in the **Preferences** for **Booked** bookings.

Now you can proceed e.g. by creating an invoice.

OPEN BOOKING   UP   CHANGE BOOKING STATUS TO CHECKED IN

Change booking status to Checked In

Changing the status to **Checked In** is only possible when a main contact has been added to the booking and the original status of the booking is **Tentative**, **Offer**, **Confirmed**, **Booked** or **Online Booking**.

Change booking status to Checked In in booking window

1. Double-click on the booking in the reservation schedule. This will open the booking window.

2. On the right side, select the booking status **Checked In** from the drop down menu.
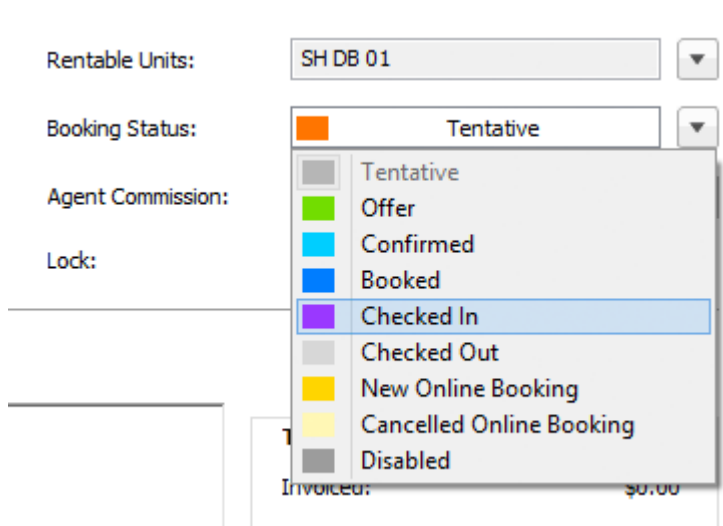
3. Close the booking window.

This will change the status of the booking automatically and the booking will change its color to the one that you have specified in the **Preferences** to show **Checked In** bookings.

Change booking status to Checked In in reservation schedule

1. Select the booking you want to edit and then call up the context menu by right-clicking on the booking.

2. Within the context menu, go to **Change Status To > Checked In**.

Alternative:

*Select the booking you want to edit and then go to **Bookings > Change Status To > Checked In**.*

Note:

You can only set the status of a booking to Checked In using the context menu or menu bar if the arrival date and the current date are the same. The current date is marked purple in the reservation schedule.

This will change the status of the booking automatically and the booking will change its color to the one that you have specified in the **Preferences** to show **Checked In** bookings.

CHANGE BOOKING STATUS TO BOOKED	UP	CHANGE BOOKING STATUS TO CHECKED OUT

Change the booking status to Checked Out

... in booking window

1. Double-click on the booking in the reservation schedule. This will open the booking window.

2. On the right side, select the booking status **Checked Out** from the drop down menu.
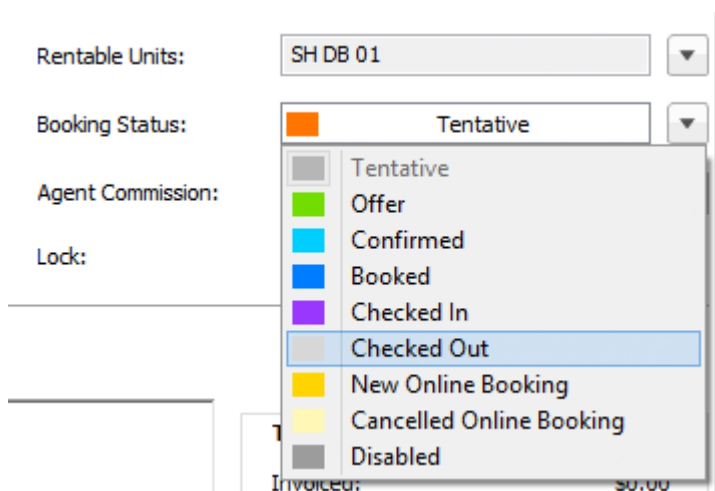
The data of a checked out booking can no longer be edited, but the status can changed back in order to re-enable editing again at any time.

3. Close the window. This will change the color of the booking to the one that you have specified in the **Preferences** to show **Checked In** bookings.

... in reservation schedule

1. Select the booking you want to edit in the reservation schedule and call up the context menu by right-clicking on it.

2. Within the context menu, go to **Change Status To > Checked Out**.

Alternative:
*Select the booking you want to edit and then go to **Bookings > Change Status To > Checked Out**.*

Note:
*You can only set the status of a booking to **Checked Out** if the current date is*

within or after the booking time frame. The current date is marked purple in the reservation schedule.

Once you have changed the status to **Checked Out**, you can still create invoices.

CHANGE BOOKING STATUS TO CHECKED IN   UP   CHANGE BOOKING STATUS TO DISABLED

Change booking status to Disabled

The booking status **Disabled** can be used to block a rentable unit for a certain amount of time (e.g. because it is being renovated). This means that bookings can be created in this unit during the closed time.

Change booking status to Disabled in booking window

1. Draw a booking into the reservation schedule for the amount of time that you want to close the unit.

2. Double-click on the newly created booking to open the booking window.

3. Within the booking window, select the booking status **Disabled** from the drop down menu.
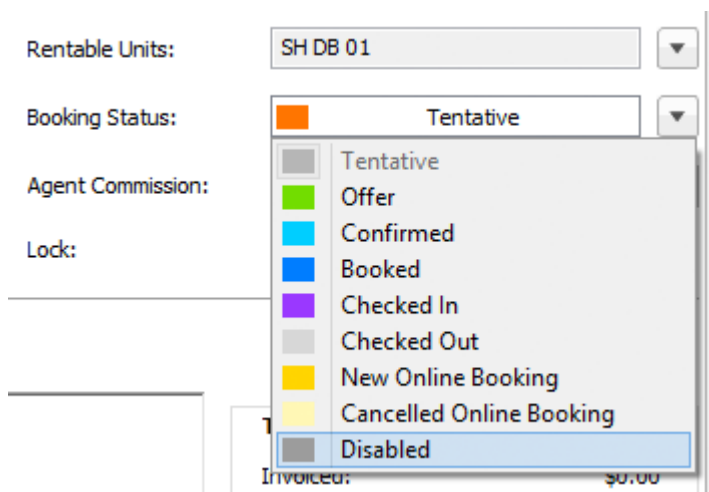
4. Close the booking window. This will cause the booking in the reservation schedule to change its color to the one you have specified in the **Preferences** for **Disabled** bookings.

Change booking status to Disabled in reservation schedule

1. Draw a booking into the reservation schedule for the amount of time that you want to close the unit.

2. Right-click on the newly created booking to open the context menu.

3. Then, select **Change Status To > Disabled**.

 Alternative:

Select the booking you want to edit in the reservation schedule and then go to
Bookings > Change Status To > Disabled.

This will change the status of the booking and the booking's color will change to the one you have specified in the **Preferences** for **Disabled** bookings.

Note:
To open the unit again, delete the booking by using the context menu or the menu bar. *Disabled* *bookings that lie in the past cannot be deleted.*

Change booking status to Checked Out   Up   Edit booking time frame

Edit booking time frame

Change the time frame in the booking window

1. Open the booking window of the booking you want to edit.

2. Use the arrows next to the date you want to edit to change the arrival and departure date.

Arrival:	11/30/2015 ∨	00:00 ▲▼	o'clock
Departure	12/ 3/2015 ∨	00:00 ▲▼	o'clock
Nights:	3		
Guests:	4	(max. 4)	

You can also change the dates by manually editing the **Arrival** and **Departure** dates.

You can also edit the number of **Nights**. By editing the number of nights, the departure date will be adjusted automatically.

> **Note:**
> *You can only edit the departure date for bookings with the status **Checked In**. Bookings with the status **Checked Out** can not be edited.*

3. Close the booking window or switch to a different list item.

Change the time frame in the reservation schedule

You can edit the time frame of a booking in the reservation schedule by dragging the booking to the left or the right, or by extending or shortening the booking.

Use the **Select** mode. To do that, click the [ ] button above the reservation schedule.

To move a booking to another time frame, select it and then drag it to the left or right while holding down the mouse button.
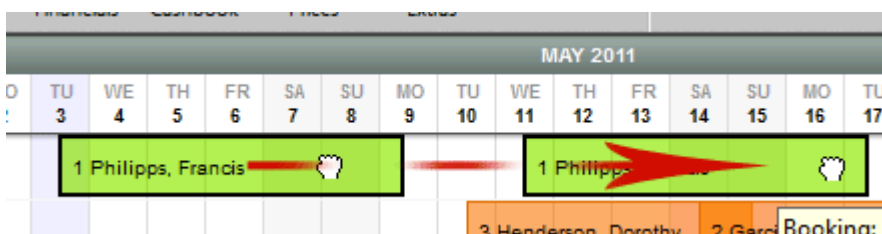
> ### *Note:*
> *Dragging a booking to a different time frame is only possible when the booking has the status **Tentative, Offer, Confirmed, Online Booking** or **Disabled**.*

Important:
If you go the booking window area **Stay** and check the box that says "Lock", the booking will be locked down with its time frame and unit no longer being editable.

To shorten or extend the time frame of a booking, drag the end of the booking to the left or right while holding down the mouse button.

Change booking status to Disabled   Up   Move booking to another unit

Move booking to another unit

1. Open the booking window of the booking that you want to edit.

2. Select a unit from the drop down menu **Rentable Units**.

> ### *Alternative:*
> *You can drag and drop a booking within the reservation schedule to move it to another unit.*

All bookings can be moved, except bookings with the status **Checked In** and **Checked Out**.

---

3. Use the **Select** mode. To do that, click the button **Select** above the reservation schedule.

4. Select the booking in the reservation schedule and drag it to the unit your want while holding the mouse button.
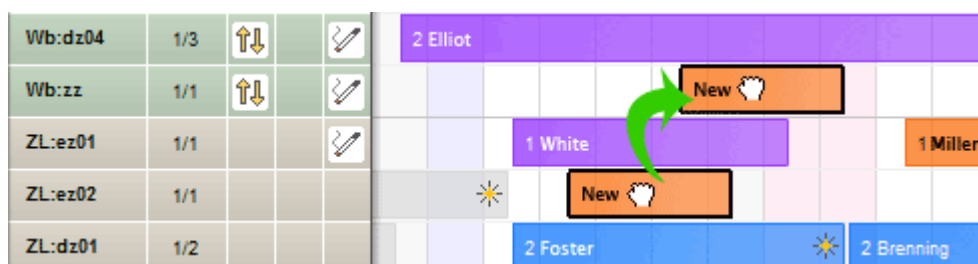
Important:
If you go the booking window area **Stay** and check the box that says "Lock", the booking will be locked down with its time frame and unit no longer being editable.

EDIT BOOKING TIME FRAME   UP   SPLIT A BOOKING (MOVE INTO ANOTHER UNIT)

Split a booking (move into another unit)

Should it become necessary to split a booking for a move into another unit, you can easily accomplish that in the reservation schedule.

The booking must be in the status **Offer**, **Confirmed**, **Booked** or **Checked In**, have a **minimum duration** of **2 nights** and are **not fixed** in relation to the **timeframe & rental unit** for the Split option to become available.

To move a guest into another unit, click the button **Split** in the reservation schedule. The cursor will now look like a pair of scissors.

Then click on the date of the booking split.
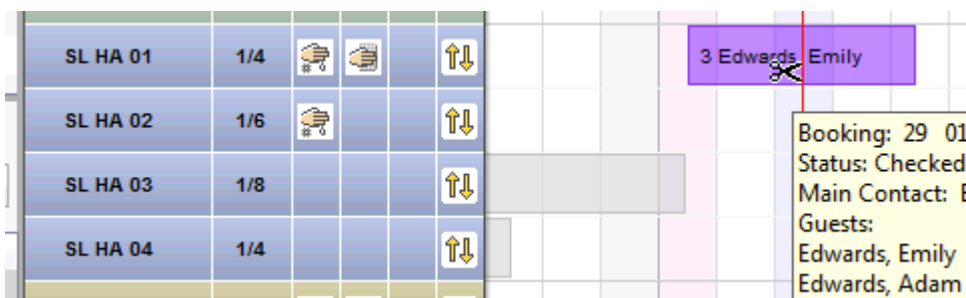
This will open the window that lets you select a different unit.

Select the unit you want and then press **OK**.

The booking will now be handled as a group booking, with each booking in the respective unit.

After the move:
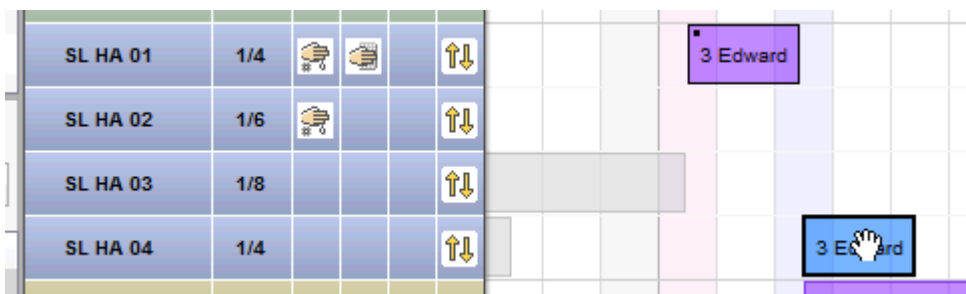
Using the context menu, you can open each split booking, open the main booking of the group, select all bookings of the group or create an invoice.

Note: There are different modes (either "Standard" for hotel or "Special" for boarding house) for splitting accommodation costs, extra items as well as city tax, which can be selected in the booking settings of the occupancy plan
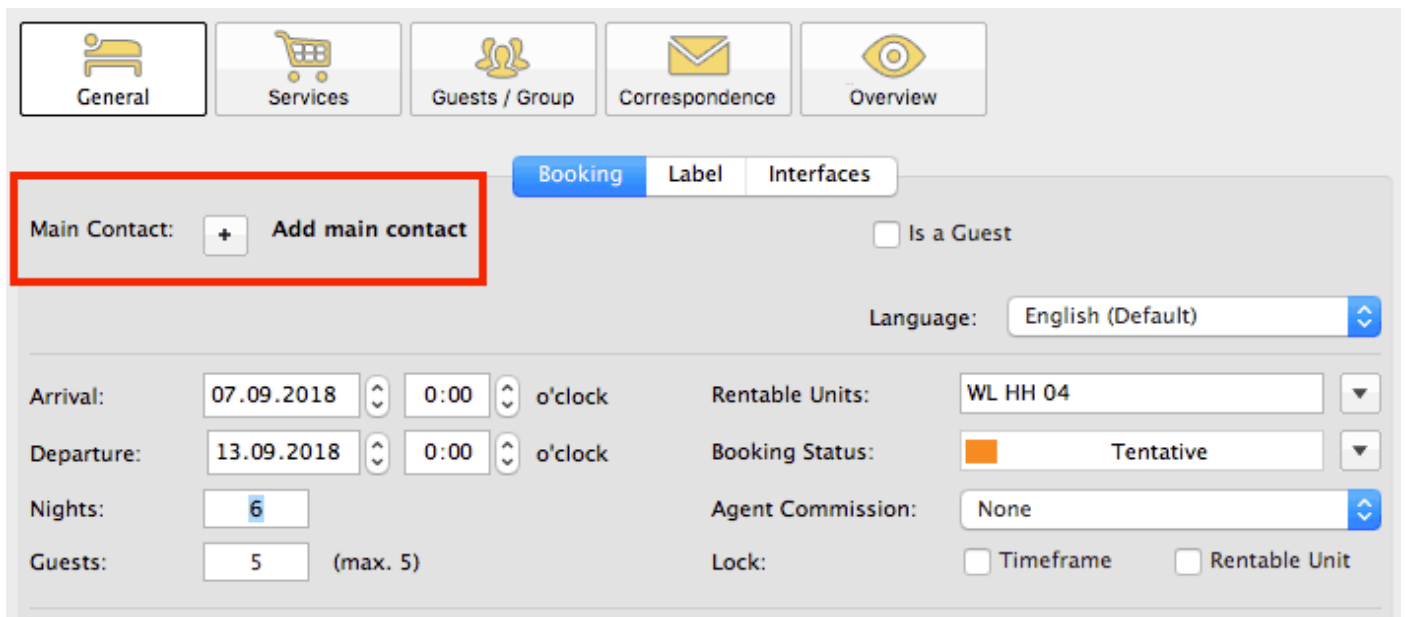
Move booking to another unit   Up   Add a main contact to a booking

Add a main contact to a booking

To assign a main contact to a booking, open the booking window.

Under the tab **Booking** click on the plus symbol [+] beside the point "Main Contact".

The guest management will be opened, where you can select the guest you want to add from the guest list and set him or her as the main contact by a double click or by selecting the button "Add to booking" (bottom right).

If the main contact of a booking changes, you can edit it later on.

All changes in the guest management will be saved automatically.

Split a booking (move into another unit)   Up   Edit price and/or price unit for a booking

Edit price and price unit for a booking

If you want to edit the price, price unit or tax rate of a certain booking, you can do so by opening the booking window and following these steps:

Edit a price time frame

1. Open the booking window of the booking that you want to edit, then go to **Services / Accommodation**.

2. To change the price for the booking, click the field **Price** and enter the price you want.

3. To change the price unit for the booking, click the field **Price Unit** and select the price unit you want.

4. To change the tax rate of the booking, click the field **Tax** and select the tax rate you want.

> ### Note:
>
> *If you change a price or price unit in the booking window, the change will only be valid **for this one booking**. It does not effect the basic settings for the unit and therefor also does not affect other bookings within this unit.*
>
> *These changes can only be made in booking **with the status Offer or higher**.*
>
> *Please keep in mind that the price or price unit cannot be changed once an invoice has been made.*

4. Close the booking window or switch to a different list point to save your changes.

Split a price time frame

1. Open the booking window of the booking that you want to edit.

2. Select the time frame you want to split, then go to **Split selected price time frame...** in the Actions menu. This will open the following window:

3. Enter the date for the split and press **Save**. Your booking will now have two price time frames that you are free to edit (e.g. for giving a discount from the 3rd day of the stay).

Merge price time frames

1. Open the booking window of the booking that you want to edit.

2. Select the price time frames you want to merge and then select **Merge selected price time frames...** from the Actions menu. This will open the following window.
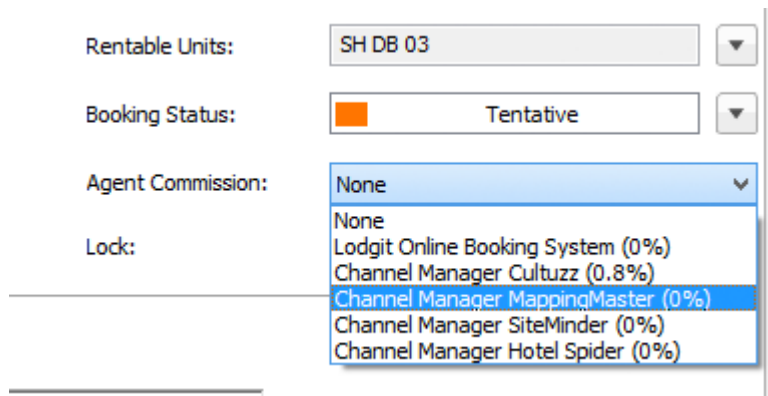
3. Enter the settings for the new merged time frame and then press **Save.**

ADD A MAIN CONTACT TO A BOOKING   UP   ADD AN AGENT TO A BOOKING

Add an agent to a booking

In the booking window you can add an agent that you have previously added in the Agent Management to a booking. To do that, simply select the agent from the drop down menu "Agent".

Rentable Units:	SH DB 03	▼
Booking Status:	🟧 Tentative	▼
Agent Commission:	None	⌄
Lock:	None	
	Lodgit Online Booking System (0%)	
	Channel Manager Cultuzz (0.8%)	
	Channel Manager MappingMaster (0%)	
	Channel Manager SiteMinder (0%)	
	Channel Manager Hotel Spider (0%)	

Note:
The agent Lodgit Online Booking System is added automatically to bookings that you have received through synchronising with the online modules.

Edit price and/or price unit for a booking   Up   Add child discounts to a booking

Add child discount

The number of children can be linked to the different child discounts that you have specified in the Object Management.

1. Open the booking window of the booking that you want to edit.

2. Go to the list item **Services > Accommodation**.

A **percentage child discount** can **only be used**, when the price of the unit **depends on the number of guests** staying in it (e.g. per night/person).

---

3. You can add the amount of children for each discount level by using the arrow next to it and selecting the number from the drop down menu.
You can also use the Actions menu item "Apply child discounts" to automatically fill out the discounts: This will use the birth dates of the guest you have listed within the booking to determine the number of children in each category.

Note:

The number of the children for each discount level combined cannot exceed the number of guests specified in the upper left are of the booking window.

Alternative:
*If you want to give a child discount on a unit even when the price does not depend on the number of guests staying in it, you can add the **child discount as an extra** with a negative amount.*

ADD AN AGENT TO A BOOKING   UP   ADD, EDIT AND BILL DESPOSITS FOR BOOKINGS

Add, edit and bill deposits for bookings

You can add one or more deposits to every booking.

1. Open the booking window and switch to **Services > Deposits.**

2. Click the "Add deposit" button to select a deposits. In the preferences you can pre-define due dates which you can select from this dropdown menu.

> *Note:*
> *Clicking the arrow at the right side of the field will let you enter a percentage and the program will then determine the amount for the deposit.*

3. You can also edit the description of a deposit.
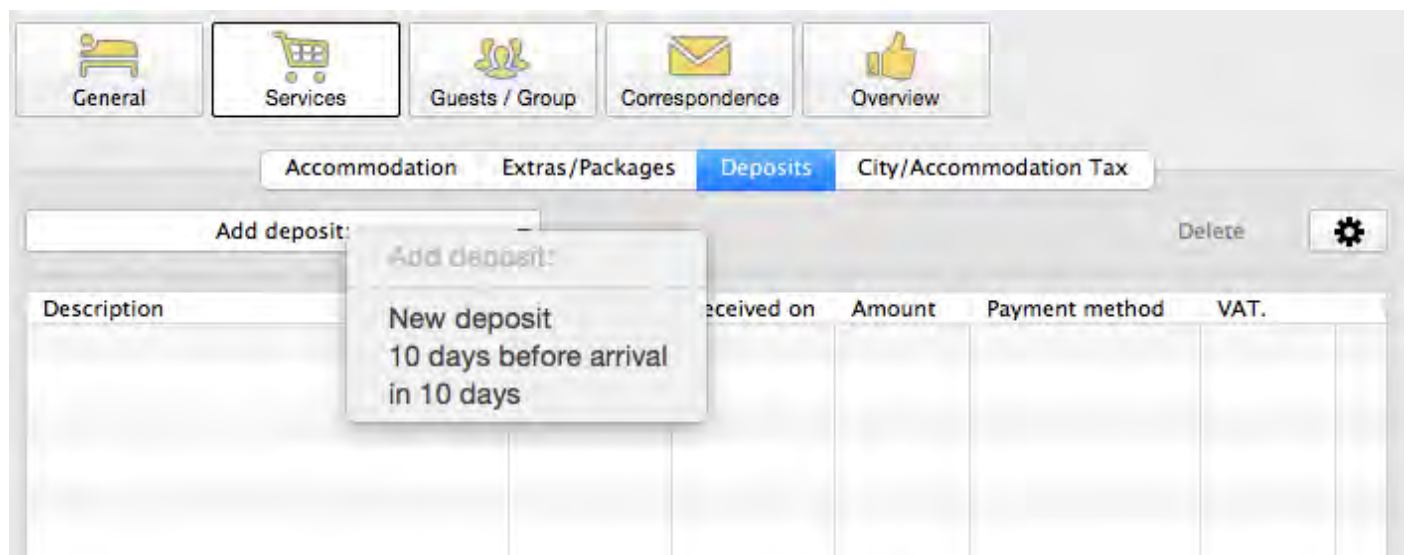
If you want to delete a deposit that you have entered, select it in the list and then press the **delete button** on the top right corner of the list. Once you hit "Save" the entry will be deleted.

When you create and offer or a confirmation, you can put paragraphs, such as requests for payment or receipt confirmations for deposits on them. The default texts for those can be added and edited under **Administration > Texts**.

> **Note:**
> All deposits will have to be accounted for on the final invoices. More information about how to add deposit payments to final invoices can be found under point 7 of Creating Invoices.

Split invoices for deposits

1. Add at least one deposit to the booking and save the changes. Then you will find a

new button **"Deposit invoice..."** at the bottom of the booking window...
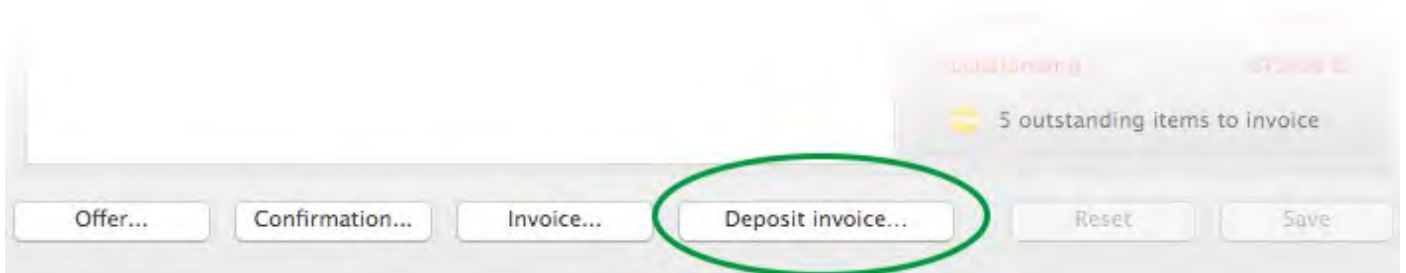
This will open the invoice window:
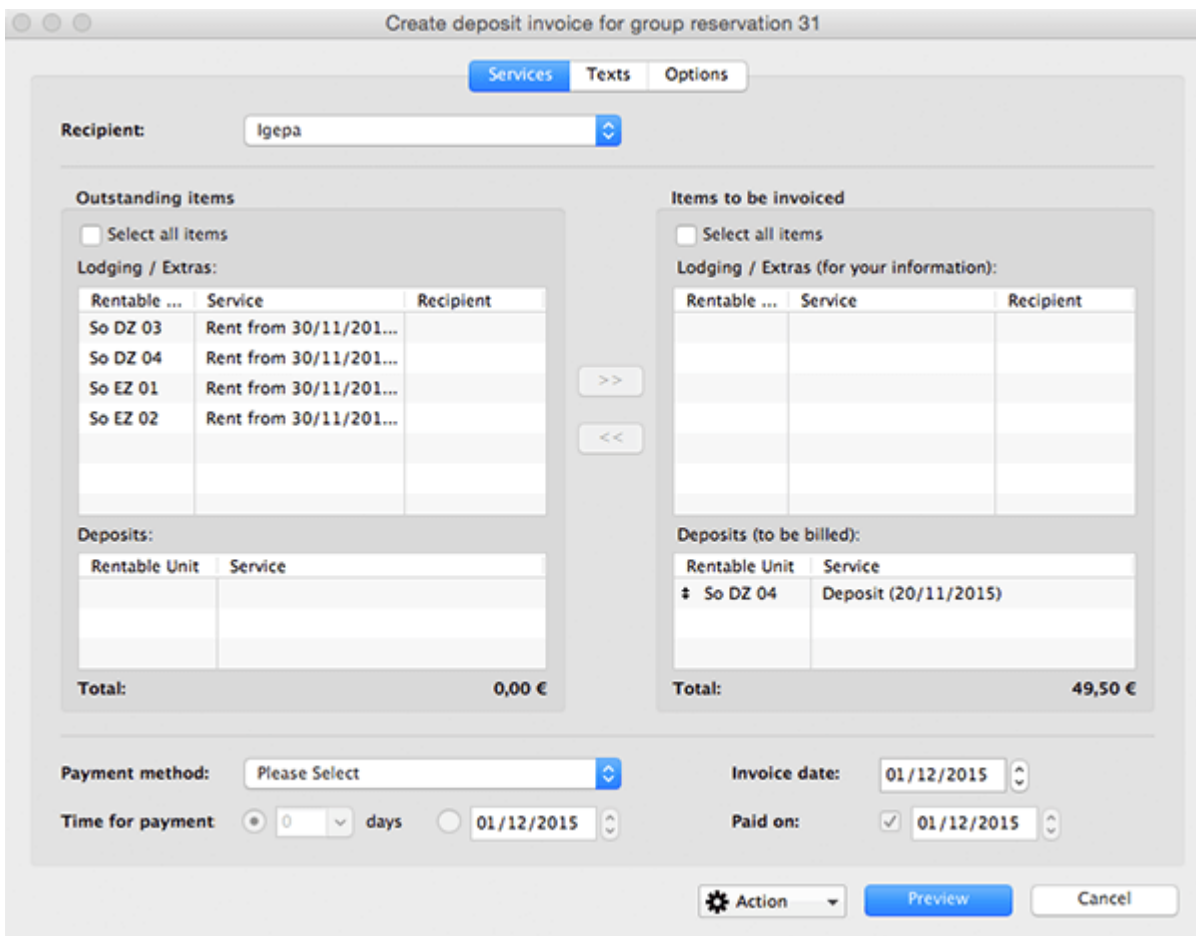
2. Highlight the items you want to invoice in the list on the left. You can select a single item or - by using the SHIFT key - several items. By clicking the button those selected items will be moved to the right side and become items to be invoiced.

3. Just like when you are creating an actual invoice you can now select the invoice recipient, payment method and due date.

4. You can preview the split invoice by pressing the **Preview** button, print it with the **Print** button. If you want to cancel the process, press **Cancel**.

Add child discounts to a booking   Up   Add guests to a booking

Add guests to a booking

You can add guests from the Guest Management to a booking. The number of guests you can add does not depend on the number you have specified under "number of guests" in the Stay data (i.e. you can add more guests to a booking than you have specified).

1. Open the booking window of the booking you want to edit.

2. Go to **Guests / Group**.

If the main contact is listed as being a guest (box "Is A Guest" is checked) they will automatically be added to the guest list under **Guests**. If not, the list stays empty at first. If needed, you can add the guest's information later when they check in.

| **Note:**

> *When a **guest note** has been added to a guest the info symbol 🛈 will appear next to the guest under **Guests**. Double-clicking the symbol will take you to the Guest Notes.*
> *If the guest is a regular this symbol will appear next to their name:* ✳

3. To add more guests, press the button [+]. This will open Guest Management where you can select an existing guest or add a new one (see Add Guest).

The **automatic group of the main contact** (marked by the 🖼 symbol) in the guest management window only shows guests that have previously checked in with the main contact. To show all guests, go to the group below called **All**.

4. Select one or several guests that you want to add to the booking and then press the button "**Add to booking '..'**". The guest management window will then stay open for other actions.

> **Alternative:**
> *You can also **double-click** on a guest to add them to the booking. In that case, the guest management window will be closed after the guest has been added.*

If you want to edit or **complete** the guest **data**, double-click on the name and the guest management window will open showing the guest profile. Enter the data and close the window.

If you want to delete a guest from a booking, select their name in the **Guest** list and then press the button [-].

> **Comment:**
> *If you add a guest to a booking using the **Guest** list, this guest will automatically be listed as a companion to the main contact in the Guest Management.*

> **Note:**
> *You can sort the list by its columns by clicking on the column headers. Clicking once will sort the list by this column into descending order, clicking again will sort it into ascending order.*

ADD, EDIT AND BILL DESPOSITS FOR BOOKINGS   UP   PRINT REGISTRATION FORM

Print registration form

Lodgit Desk offers the option of creating and **printing a common registration form** as well as connecting to an electronic registration system of the municipality you belong to.

> ***Please note:*** *The electronic registration form is currently only available for German speaking systems.*

1. Open the booking that you want to print a registration form for.

2. Go to the list item **Guest/Group** and select "Registration Form".
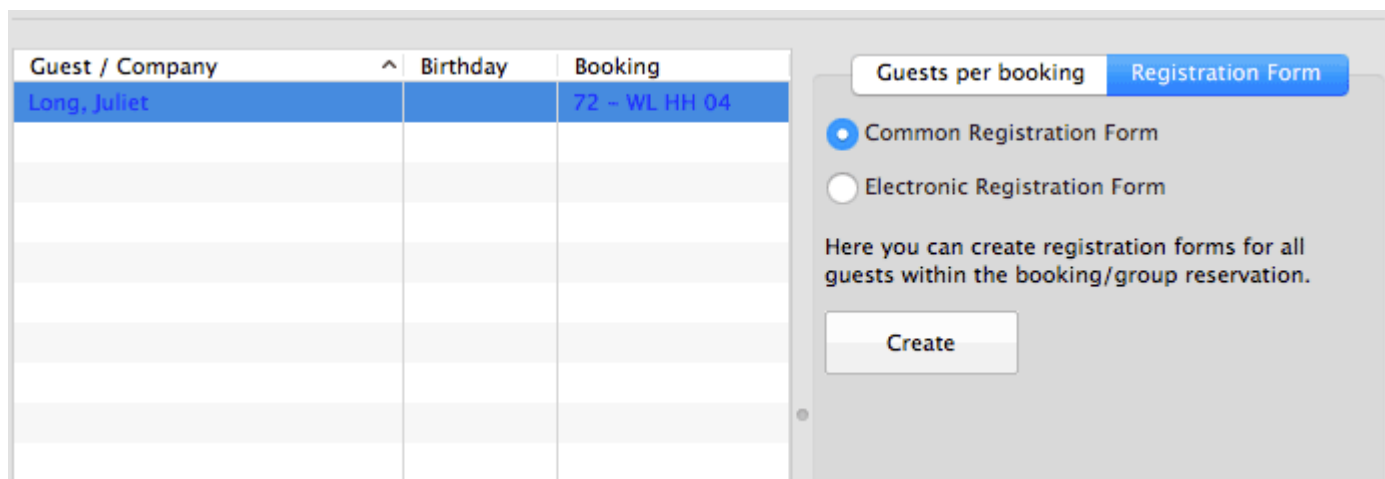
3. You can choose between the "Common Registration Form" and "Electronic Registration Form". Currently, the 'Electronic Registration Systems' we're connected to, only cater to German-speaking countries, so you'll most like be selecting the **Common Registration Form**. Then click the button "Create..." and a new window will open.

If the common registration form is to be numbered consecutively, please tick the checkbox >Display on the registration form form.

4. Select a registration template (default: general registration form) and the object that you have to create the registration form for. Now you can decide whether you want to create the form for a **Single/Family, Travel Group,** or whether you want to print out an empty registration form for your guests to fill out by themselves. You can also add notes to the registration form (e.g. a non-smoking policy the guest automatically agrees to when signing the form) and edit the arrival and departure dates.

5. You can then "Preview" or "Print" the form by pressing the respective buttons or

cancel the process by pressing "Close".

Example: *Print preview for the registration form*

A<small>DD</small> <small>GUESTS</small> <small>TO</small> <small>A</small> <small>BOOKING</small>   U<small>P</small>   A<small>DD</small> <small>EXTRAS</small> <small>TO</small> <small>A</small> <small>BOOKING</small>

Add extras and packages to a booking

You can add extras and packages to every booking.

How to add extras

1. Open the booking window of the booking that you want to edit.

2. Switch to the item **Services > Extras/Packages**.

3. Open the list "Add extra item" and select your extra item in the drop down menu.
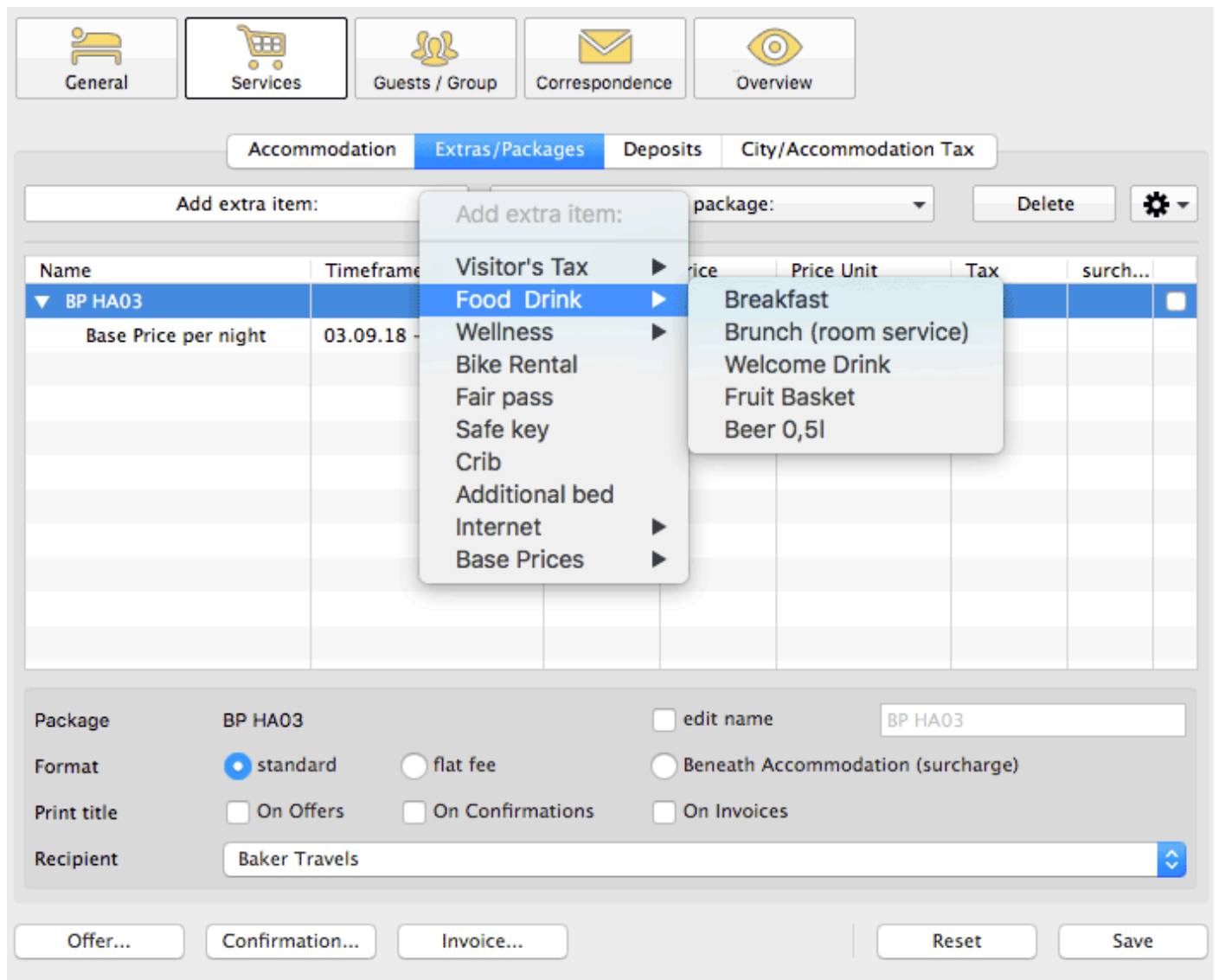
4. If you want, you can edit the extra items data, then hit **Save**.

Note:

When adding a night or day dependant extra item, Lodgit Desk will automatically suggest the time frame of the booking as the time frame for the extra. You can then edit the dates manually.

Tip:
When creating an invoice for a booking that has inclusive extras you can decide whether you want to print the extras on the invoice or not.

Note:
You can create new extras by clicking the *button. This will open the window for extras.*

Add packages

1. Open the booking window of the booking that you want to edit.

2. Switch to the item **Services > Extras/Packages**.

3. Open the list "Add package".

4. Select one of the packages that you have previously added in the Package Management. This will be added to the booking.

When you have already added several extras you can quickly create a new package template out of them by pressing the action "Save extras in a new package template...". This will open the Package Management with the newly added package "New Package" which you can then simply rename.

You can also edit a package specifically for the booking by double-clicking on it:

Here you can edit the price displayed (standard, inclusive or flat fee), the recipient as well as the title and whether or not it will be printed.

> *Note:*
> *You can sort the list by its columns by clicking on the column headers. Clicking the header once will sort the list by this column in descending order. Clicking again will sort it in ascending order.*

Combine Extras and Packages into a new package

Extras and packages in a booking can be combined into a new package. This way, you can easily create an individual flat fee package, for example.
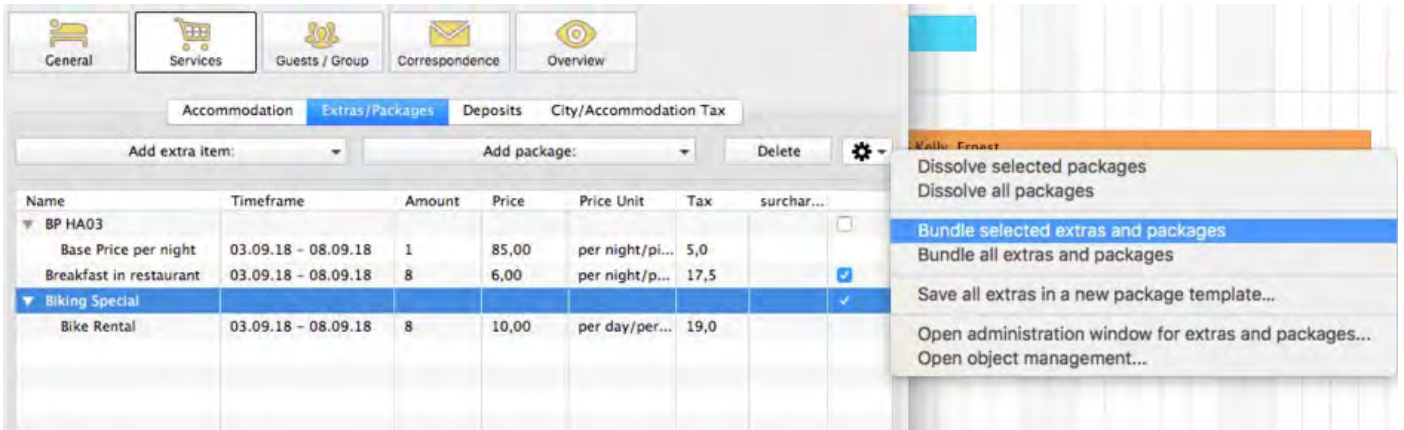
Select the extras and packages you want to bundle. Through the Actions menu you can then bundle all selected items into a new package. Existing packages that are bundled will become sub-packages. Alternatively, you can also bundle all extras and packages in a booking together, regardless of whether they were selected or not.

> **Important:**
> *If an extra item had the status "inclusive" before being bundled, that status will revert to "normal" when the extra is in the package.*

Dissolve packages

Packages in a booking can be dissolved and, with the bundle function, re-combined.
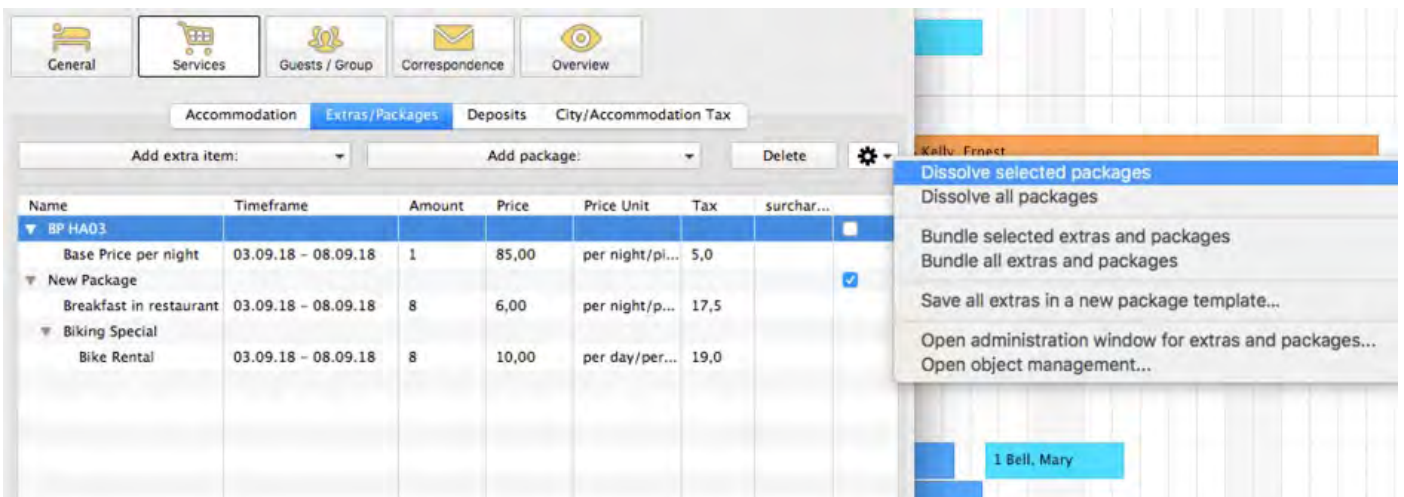
Select the package or packages you want to dissolve. Through the Actions menu you can then dissolve all selected packages. Alternatively, you can also dissolve all packages, regardless of whether they were selected or not. The extra items of those packages will then be listed individually in the booking.

> **Important:**
> *Extra items of "inclusive" packages that are dissolved will all receive the status "inclusive".*

PRINT REGISTRATION FORM   UP   DELETE EXTRAS FROM A BOOKING

Deleting extras from a booking

1. Open the booking window of the booking that you want to edit.

2. Go to the item **Services > Extras/Packages**.

3. Select the extra or package that you want to delete in the list and then press the button **Delete**.

   If you have already billed the extras and packages you cannot delete them anymore. You will first have to cancel the existing invoice.

4. Close the booking window or switch to a different list item.

   Note:
   You can sort the list of extras by its columns by clicking on the column header. Clicking once will sort the list by this column descendingly, clicking again will sort it ascendingly.

   ADD EXTRAS TO A BOOKING   UP   ADD NOTES TO A BOOKING

Add notes to a booking

You have the option to add **notes** to every booking.

Open the booking window of the booking that you want to add notes to. In the lower left corner you can see the note field.
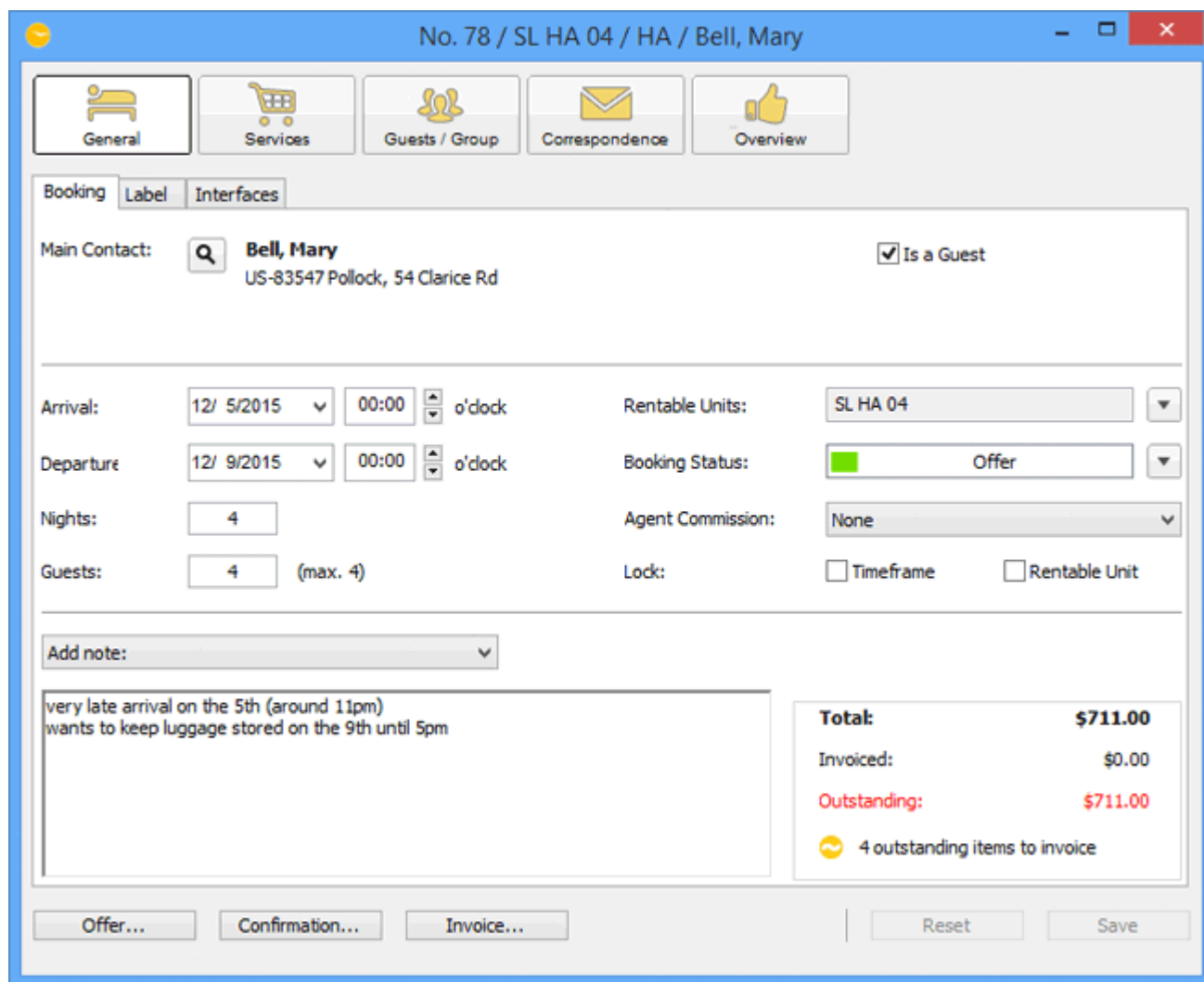
You can save this note in a template, or add an existing note template to the booking.

> *Note:*
> *The booking list shows the ⓘsymbol next to bookings that have notes attached to them.*

DELETE EXTRAS FROM A BOOKING   UP   VIEW AND PRINT CORRESPONDENCE

View and print correspondence

1. Open the booking window of the booking you want to edit.

2. Switch to the tab **Correspondence**. The Correspondence page will show you all created offers, confirmations and invoices for this booking.
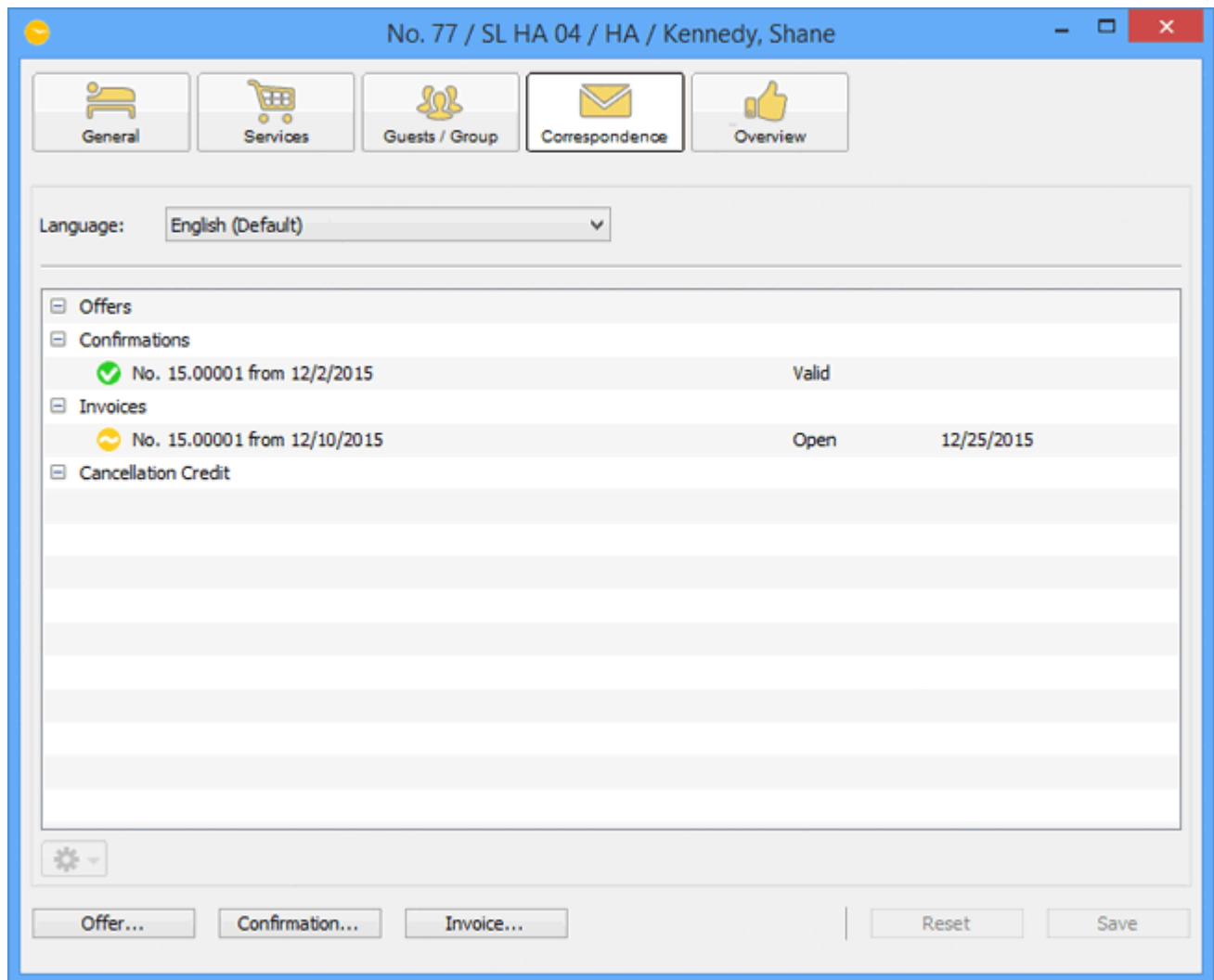
You can print the offers, confirmations and invoices again from this window.

To print a document, double-click on its name in the list and then press **Print** in the print preview window.

You can also **cancel outstanding invoices** in this window by using the context menu (right-click) action "Cancel Invoice" (for more info, see invoices).

3. Close the booking window or switch to a different list point.

Add, edit and delete a city tax

In the booking window, go to **Services** and then choose **City/Accommodation Tax** panel.

Use the **Select city/accommodation tax ...** button to add or overwrite the currently added tax with one you have previously created. You can also delete a tax you have added here.

Use the edit Actions button to call up the preferences window for the city/accommodation tax and edit the ones you have previously added.

Please note:

If you edit a city tax that has already been added to one or more bookings, it will not automatically change within those bookings (except for where they are placed on the correspondence). If you've changed something (e.g. the amount of the tax) you will have to manually overwrite it in the bookings by re-selecting it from

the menu.

VIEW AND PRINT CORRESPONDENCE   UP   CREATE GROUP RESERVATION

Create group reservation

Create group from single bookings

1. Select two or more bookings in the reservation schedule.

   To select several bookings that are next to each other, drag your cursor over the bookings while holding down the mouse button.

   If the bookings are not next to each other, select the first booking and then hold the SHIFT key while selecting the other bookings.

2. Right-click on one of the selected bookings and then select under **Create Group Reservation With Main Contact** the booking that you want to designate as the main booking for the reservation.

   Important: This function is only available when the bookings can be displayed in the reservation schedule together! You can change how many days are displayed in the reservation schedule to show more bookings.
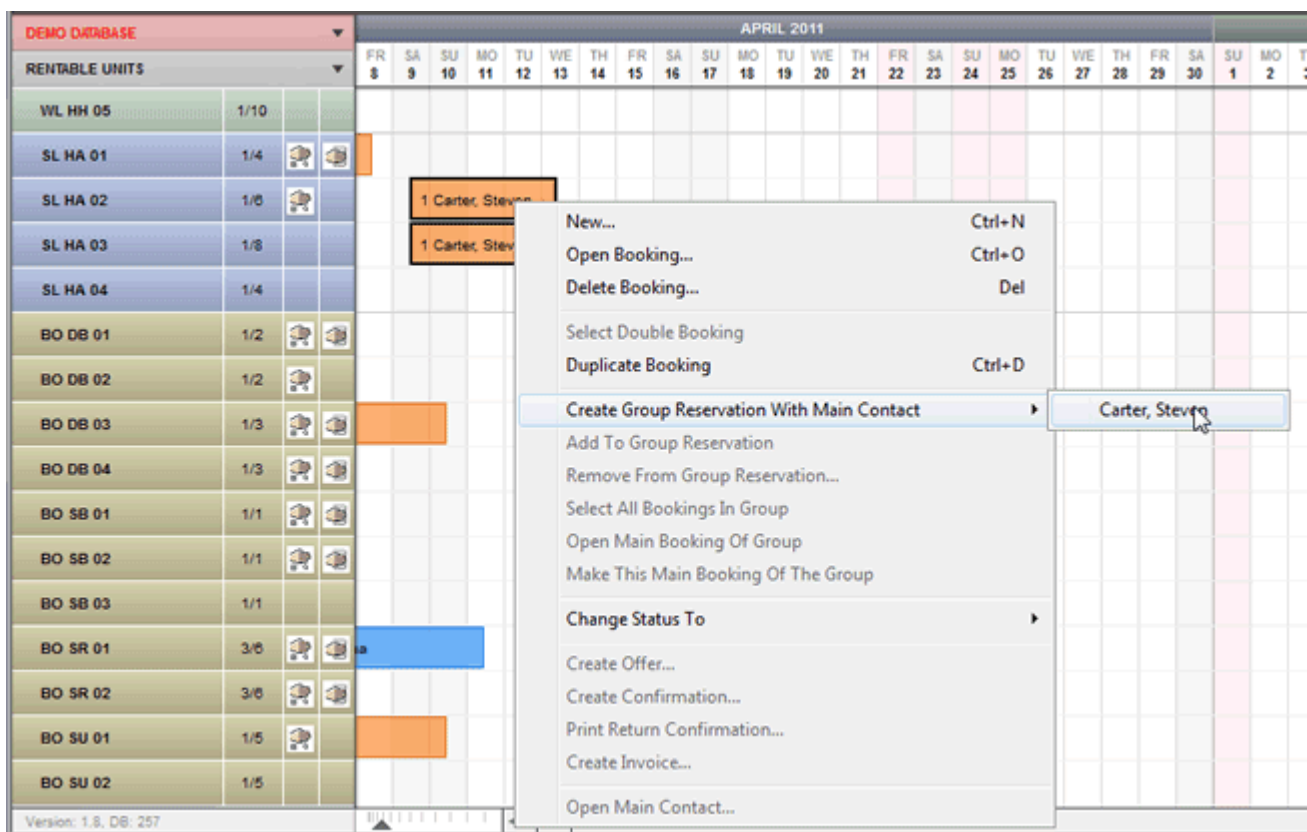
Alternative:
Select two or more bookings and then go to **Bookings > Create Group Reservation With Main Contact** *and select the booking that you want to designate as the main booking of the group reservation.*

This will put the selected bookings in a group and one main contact will be specified. The main contact for the group reservation depends on which booking is the main

booking of the group reservation.

> Tip: If you want to create a collective invoice for bookings of different rental units and booking periods, use the possibility of creating a group reservation in the reservation schedule.

Create with Booking Assistant

You can quickly generate a large group booking in which all bookings are in the same time frame by using the booking assistant.

The Group Booking

The main booking of a group reservation will be displayed with a small dot in the upper left corner.
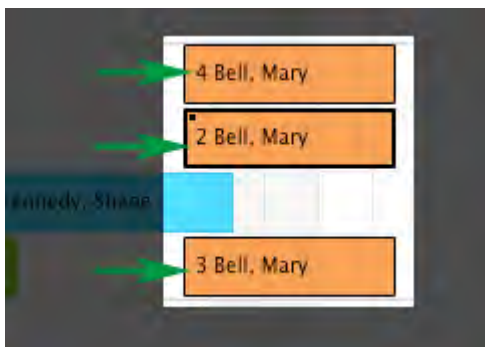
After the bookings have been put into a group, each booking will have the box next to **Group Reservation** checked.
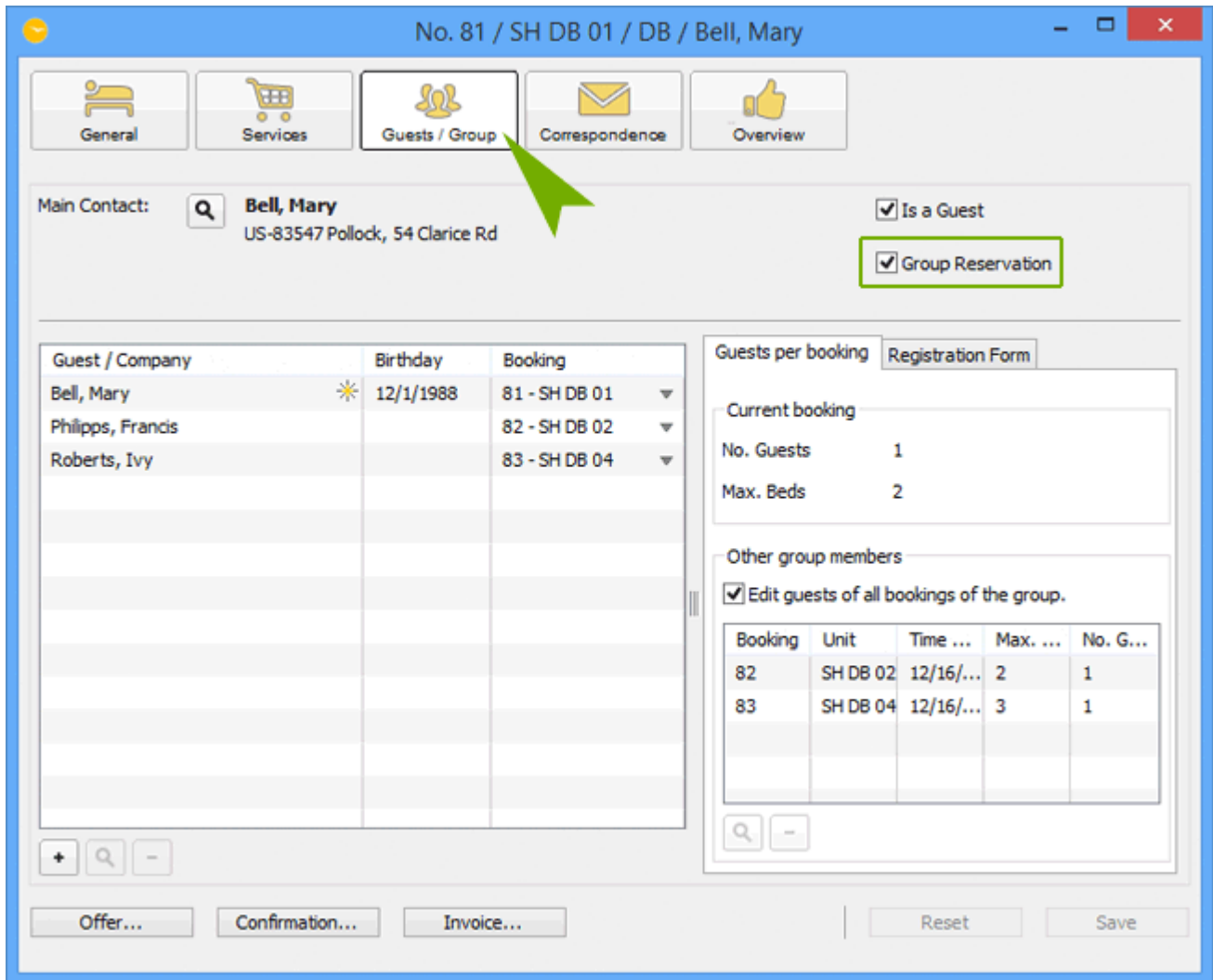
Under the **Guests/Group** item will list all other units for this group.

To open the booking window of a different booking belonging to the group, select it in the list and then press the magnifying glass button, or double-click on it.

Depending on the status that the bookings of the group have, you can create an offer, a confirmation or an invoice for the group reservation. You have the option of splitting the invoice.

You can easily select all bookings of a group by selecting one booking and then using the context menu or the menu bar to go to **Bookings > Select All Bookings In Group**. This will then select all the bookings of the group reservation.

SL HA 03	2/8		⇅	8 Long, Ju		8 Baker Travels	
SL HA 04	2/4		⇅	Kenned	4 Bell, Mary		
SH DB 01	1/2	🗝	⇅	2 Smith, Kyle		2 Anderson, C	
SH DB 02	1/2	🗝	⇅		2 Anders, Tim		
SH DB 03	1/3	🗝 ✎	⇅	2 Irdir			
SH DB 04	1/3	🗝 ✎	⇅	1 Irdi			
SH SB 01	1/1	🗝	⇅	1 Irdi			
SH SB 02	1/1	🗝	⇅	1 Irdi			
SH SR 01	3/6	🗝	⇅	Irdima			
SH SR 02	3/6	🗝 ✎	⇅				

Version: 1.18.12, DB: 681

Open Booking...   ⌘O
Delete Booking...   ⌦
Duplicate Booking   ⌘D

Select Overbooking

Create Group Reservation With Main Contact
Add To Group Reservation
Remove From Group Reservation...
Select All Bookings In Group
Open Main Booking Of Group
Make This Main Booking Of The Group

Change Status To   ▶
Lock booking   ⇧⌘F
Change Tag   ▶

Create Offer...
Create Confirmation...
Print Return Confirmation...
Create Invoice...

Create Registration Form...

Open Main Contact...

Show: All Bookings

Booking	Status		
71	Confirmed		⊙
82	Tentative		⊙
66	Booked		⊙
72	Confirmed		⊙
15	Tentative		⊙
63	Tentative		⊙
81	Booked		⊙
26	Tentative		⊙
47	Offer		⊙
14	Tentative		⊙

You also have the option to quickly open the booking window of the main booking by using the context menu or going to **Bookings > Open Main Booking Of Group**.

A<small>DD A CITY/ACCOMMODATION TAX TO A BOOKING</small>   U<small>P</small>   R<small>EMOVE FROM GROUP RESERVATION</small>

Remove from group reservation

The feature **Remove from group reservation** is explained below;

Starting point:

Mary Bell wants to book three rentable units for herself and two other guests (Francis Philipps and Ivy Roberts).

Three bookings are created in three different units: one for Francis Philipps, one for Mary Bell and one for Ivy Roberts.
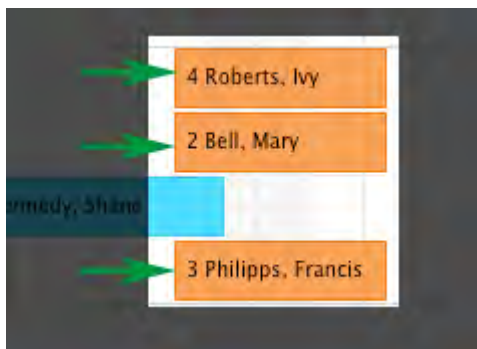
You can then put these bookings together in a group. Since the main contact for all three bookings is Mary Bell, a small dot in the upper left corner of that booking indicates that this is the main booking of the group.
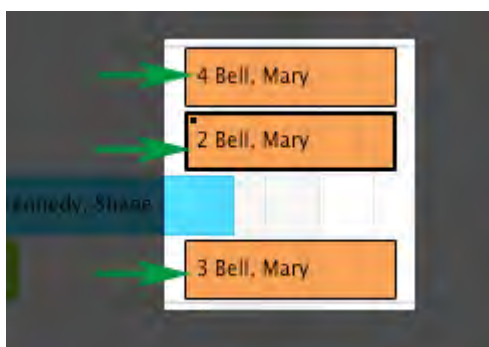
The rentable units and guests belonging to the group will be displayed in the "Guests / Group" section of the booking window. After we have created the group, we'll take a look at each booking window. In each booking window, you'll find the rentable units of the group in the list item **Group**.

Main booking of the group:

Situation 1:

The booking for Ivy Roberts is to be deleted from the group because she wants to pay the invoice for her stay herself. There are 4 ways to remove this booking from the group which we will now describe in 3 examples.

Ex. 1:

Removing one of the bookings from the group via the booking windows of one of the other bookings

Head to "Guests / Groups" in one of the other booking windows, select the booking and click the minus button.
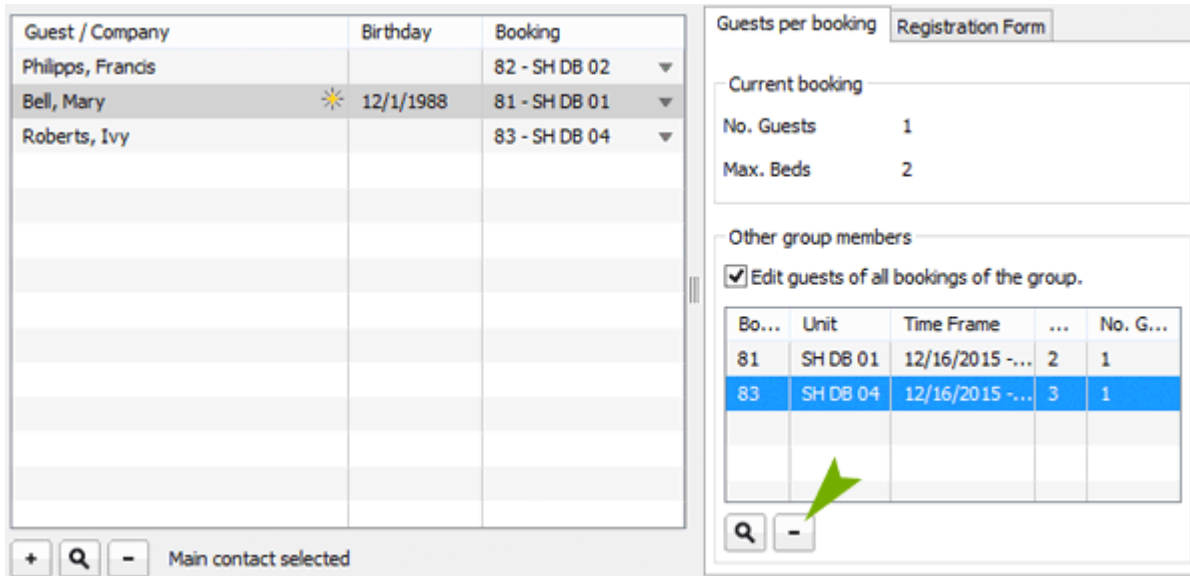
After saving, the booking will be removed from the group and the group will then only consist of two bookings. The booking that has been removed from the group will **not be deleted**. It will continue to exist as an ordinary, separate booking.

Ex. 2:
Remove the booking Roberts via its own booking window:

Double-click on the booking you want to remove from the group in the reservation schedule. In the booking window, uncheck the box that says "Group Reservation" next to the main contact.

After saving, the booking will be removed from the group and the group will from then only consist of two bookings.

Ex. 3:
Remove the booking Roberts from the group in the reservation schedule:

Select the booking Roberts and call up the context menu (right-click) and select the item **Remove from group reservation**.

> *Alternative:*
> *Select the booking Roberts and then go to the menu bar* ***Bookings > Remove from group reservation****.*

This will remove the booking Roberts from the group. The group then consists of the bookings Philipps and Bell.

Result for all 3 examples:

Note:

If there are only two bookings in a group and one is removed, the group booking will be dissolved entirely. It doesn't matter which booking you remove from the group. Both bookings will then be linked to different main contacts.

Situation 2:

The group reservation Bell is to be dissolved entirely, i.e. all bookings are meant to be removed from the group reservation. You can go about this in two ways.

You will have to confirm the process.

If you do want to confirm the process, press **Continue**.

After you have unchecked the box **Group Reservation**, the list item **Group** that lists the other units will be deleted. The first guest that is listed in the booking (Mary Bell, in this case) will be made the main contact for the booking.

Possibility 2:

Select the booking Bell (which is the main booking of the group) and select the item **Remove from group reservation** from the context menu (right-click).

> *Alternative:*
> *Select the booking Bell (which is the main booking of the group) and then go to* **Bookings > Remove from group reservation**.

You will be prompted to confirm the process, like mentioned above.

Removing the main booking from the booking windows of the other bookings is not possible.

Result:
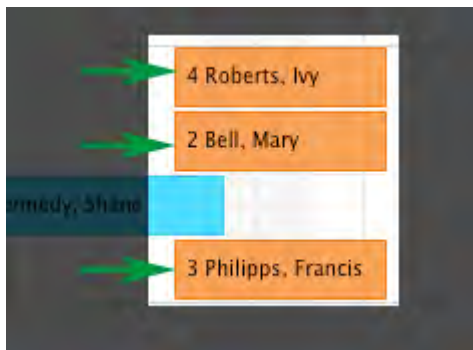
CREATE GROUP RESERVATION   UP   OVERVIEW OVER THE (GROUP) BOOKING

Overview over the (group) booking

The booking window offers you an **overview** over the statistics of a (group) booking. It is separated into three areas:
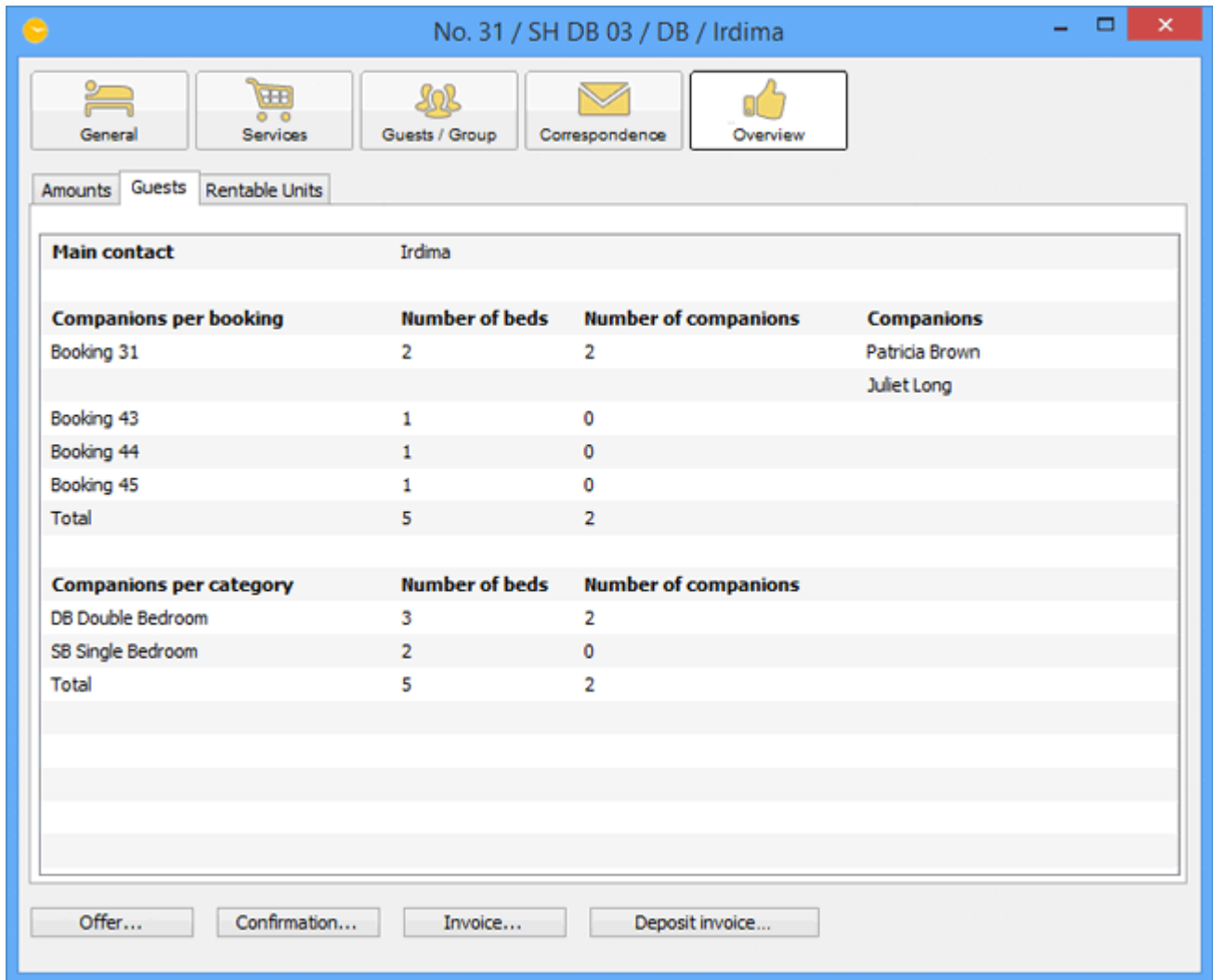
Under **Amounts** you'll find:

- the total amount for the accommodation
- the total amount for the extras
- the number of items
- the total amount
- which amounts have already been billed/paid
- whether deposits exist

For a **group booking,** you'll additionally find the overview over every single booking of the group.

| No. 31 / SH DB 03 / DB / Irdima | — □ ✕ |

| General | Services | Guests / Group | Correspondence | Overview |

Amounts | **Guests** | Rentable Units

Main contact	Irdima		
Companions per booking	**Number of beds**	**Number of companions**	**Companions**
Booking 31	2	2	Patricia Brown
			Juliet Long
Booking 43	1	0	
Booking 44	1	0	
Booking 45	1	0	
Total	5	2	
Companions per category	**Number of beds**	**Number of companions**	
DB Double Bedroom	3	2	
SB Single Bedroom	2	0	
Total	5	2	

| Offer... | Confirmation... | Invoice... | Deposit invoice... |

Under **Guests**, you'll find the guest information for the (group) booking: Number and Names of the guests per unit, category and number of regular guests.
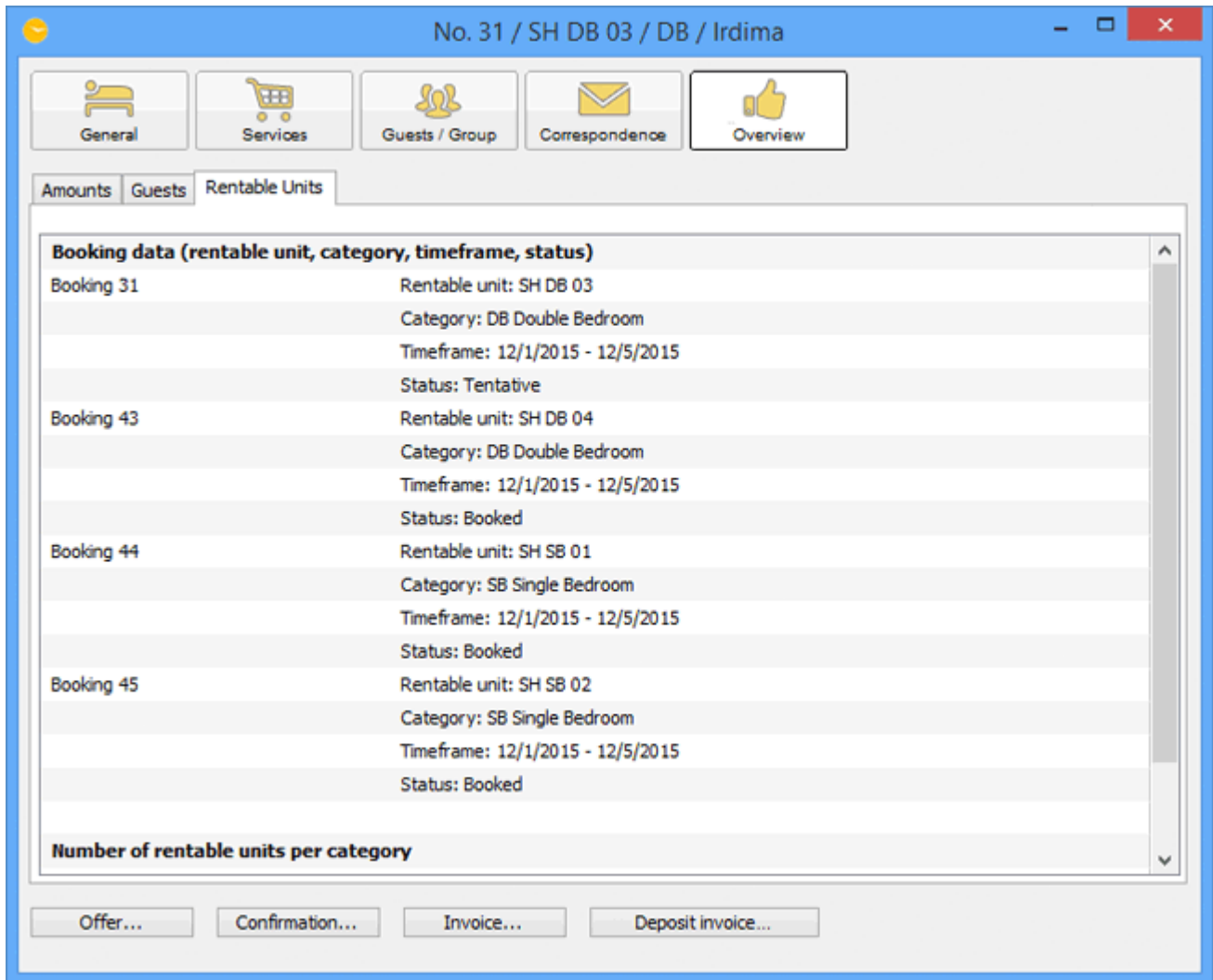
And under **Rentable Units**, you'll find information about the units, the booking status, categories and time frames.

REMOVE FROM GROUP RESERVATION   UP   EDIT THE GUEST DATA OF A BOOKING

Edit the main contact of a booking

To edit the guest data of a booking, open the booking that you want to edit.

Under the tab **Booking** click on the editing icon [✎] besides "Main Contact".
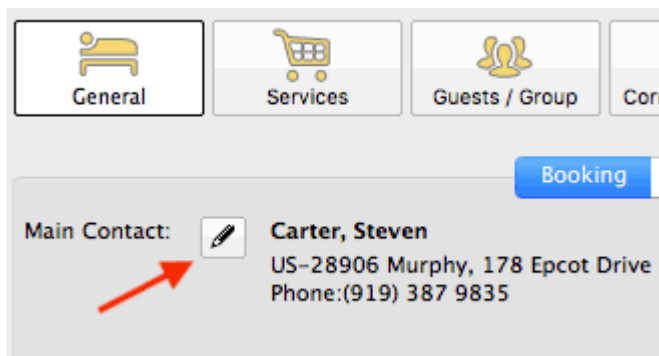
This will open the Guest Management window with the **guest profile**.

Select the guest from the list and set him or her as the main contact by a double-click. Alternatively, select the button "Add to Booking" at the bottom right of the window.

More information about Guest Management...

> **Note:**
> *Changes in the guest management will be saved automatically.*

OVERVIEW OVER THE (GROUP) BOOKING   UP   DELETE BOOKING

Delete booking

To delete a booking, select it in the reservation schedule and call up the context menu (right-click). Then select **Delete Booking**.

> *Alternative:*
> *Select the booking you want to delete and then go to **Bookings > Delete Booking** or press the **Del.** key.*

Please note: A booking **CANNOT** be deleted if

- the booking is in the status **Checked In** or **Checked Out**,
- the booking is in the status **Disabled** and lies before the current date,
- the booking is **locked**,
- the booking contains a **deposit** that's **not yet invoiced**,
- the booking is in **a status** for which you have **disabled the delete function** in the settings.

There is a difference between:

1. Deleting a single booking

The booking will be deleted after you have confirmed the process in the pop up window.

> If a booking contains received deposits (date of receival listed in the field "Received on") that have not been billed in an invoice, yet, the booking cannot be deleted.

2. Deleting a booking belonging to a group reservation

When you delete a booking that belongs to a group reservation, you will be asked to confirm before the process is carried out.
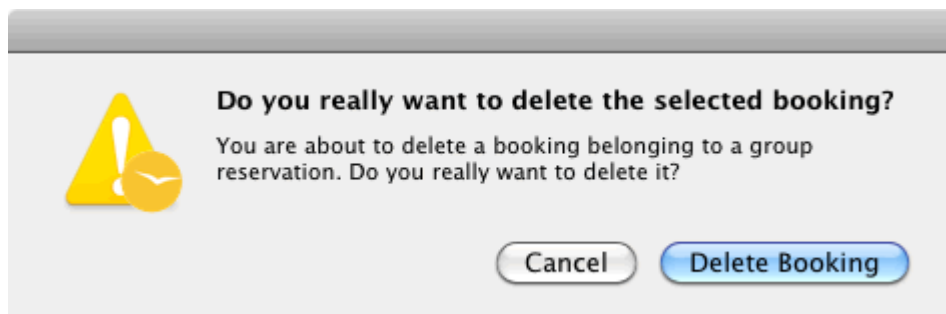
When you press **Delete Booking**, only the currently selected booking will be deleted and the group reservation still exists.

If the group only consists of two bookings, the selected booking will be deleted and the other booking will continue to exist as an independent single booking.

If you want to cancel the process, press **Cancel**.

3. Deleting the main booking of a group

When you delete the main booking of a group reservation, you will be asked to confirm the process.
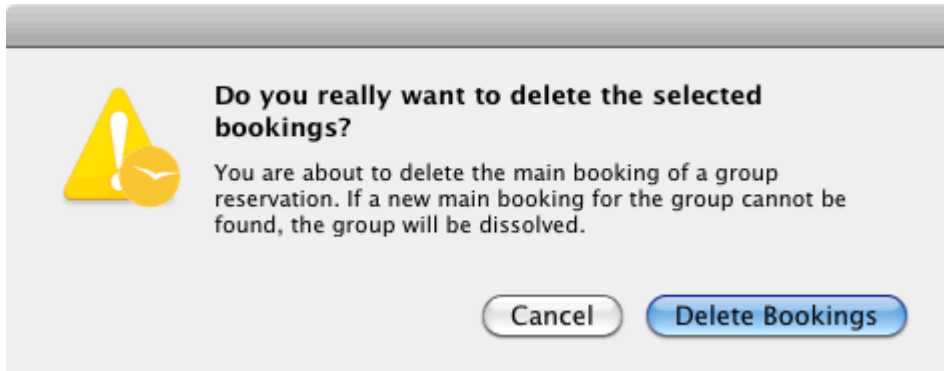
When you press **Delete Bookings**, all bookings belonging to the group will be deleted.

If you want to cancel the process, press **Cancel**.

EDIT THE GUEST DATA OF A BOOKING   UP   GUEST MANAGEMENT

Guest Management

To open the Guest Management, go to **Administration > Guests** in the menu bar or click on the button **Guests** just above the reservation schedule.

The Guest Management window will open. This window is divided into 3 areas.
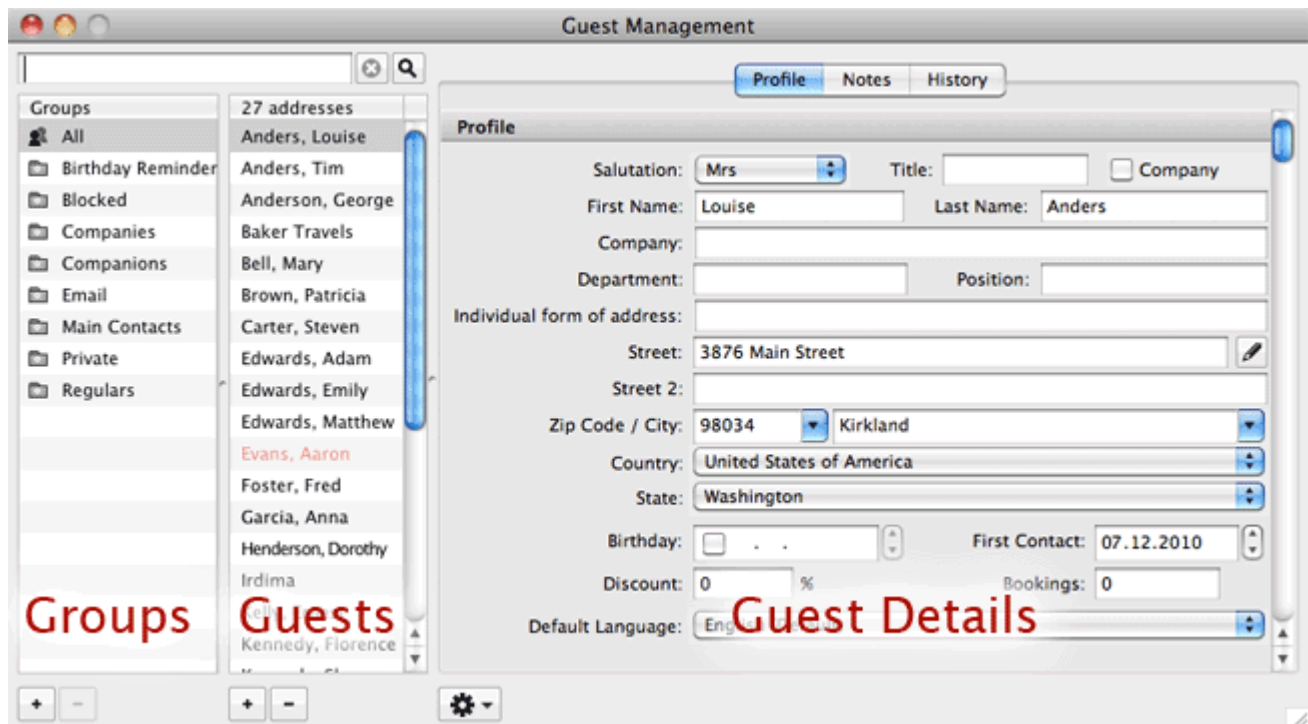
> **Note:**
> *When you open the Guest Management, you will be notified that the international zip code database is now available for download. Press "Yes" to open the window for downloading the database. If you don't want to download the database at the moment, press "No". You can download the database at any time by going to "Administration > Additional Modules > Install Zip Code Database...".*

Groups & Guest List

When selecting a certain group, the members of this group will be shown in the guest list on the right. The group **All** contains all guests in the Guest Management. Below this group you will find several **automatic groups** that were created by Lodgit Desk and are filled automatically (e.g. "Companies" contain all members that are a company). You can also add your own groups that you can use when sending serial letters, for example.

You can now choose from the following actions:

- Add & duplicate guest
- Block guest
- Use automatic groups and own groups

Search for a guest
- Send emails to one or more guests
- Send letters to one of more guests
- Import guest data
- Export guest data

Guest details

The area guest details is once again divided into the areas profile, notes and history. This area contains all of the guest's information that you have selected in the guest list.

The **profile** will offer you the following actions:

- Edit guest profile
- Add guest discount: You can add a personal discount for each guest which will then be added to the guest's bookings.
- Add and edit communicative and other data

Under **Notes** you can do the following:

- Add/edit notes to a guest: You can add, edit and delete notes for each guest e.g. allergies or special preferences.

Under **History** you can do the following:

- View/print offers for the guest
- View/print confirmations for the guest
- View/print invoices for the guest
- View/print corrective invoices for the guest
- View dunning notices for the guest
- View, edit and create correspondence with the guest
- View companions of the guest
- View all bookings of the guest

Tip:
If you click on an area header within the guest profile (Profile, Communication or More Information) you can hide that section. That way, you don't have to scroll all the way down!

DELETE BOOKING   UP   ADD / DUPLICATE / DELETE GUEST

Add / Duplicate / Delete Guest

Add Guest

1. Open the Guest Management.

2. Press the button ![+] underneath the guest list. This will open a new, empty guest profile.

3. Enter the data of the guest.
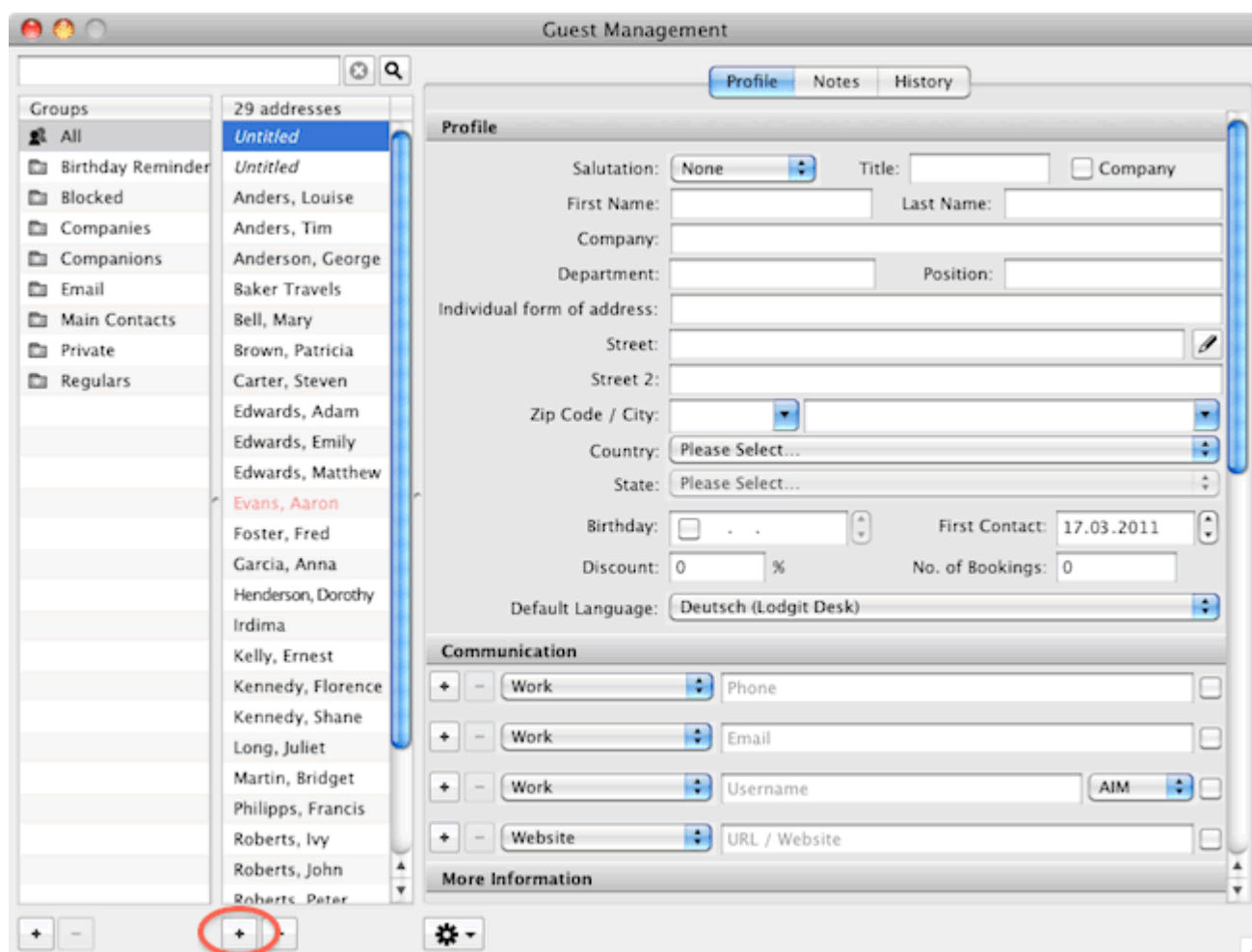
Whenever you add a new guest and enter information in their profile they will be automatically saved and the guest will be listed in the guest list.

When you add a new guest to the guest list, the current date will be listed as the **First Contact** date.

The profile also lists the **No. of bookings** (how many times this guest was the main contact of a booking). When they **check out**, this number will automatically increase.

Duplicate guest

If you want to add a guest with almost identical data to another, you can simply **Duplicate** the other guest. Select the guest you want to duplicate and then call up the context menu (right-click) or the Actions menu [⚙▾] and select the menu item "Duplicate Guests".

After you have added the guest you can edit it by clicking on it and then making the changes you want to.
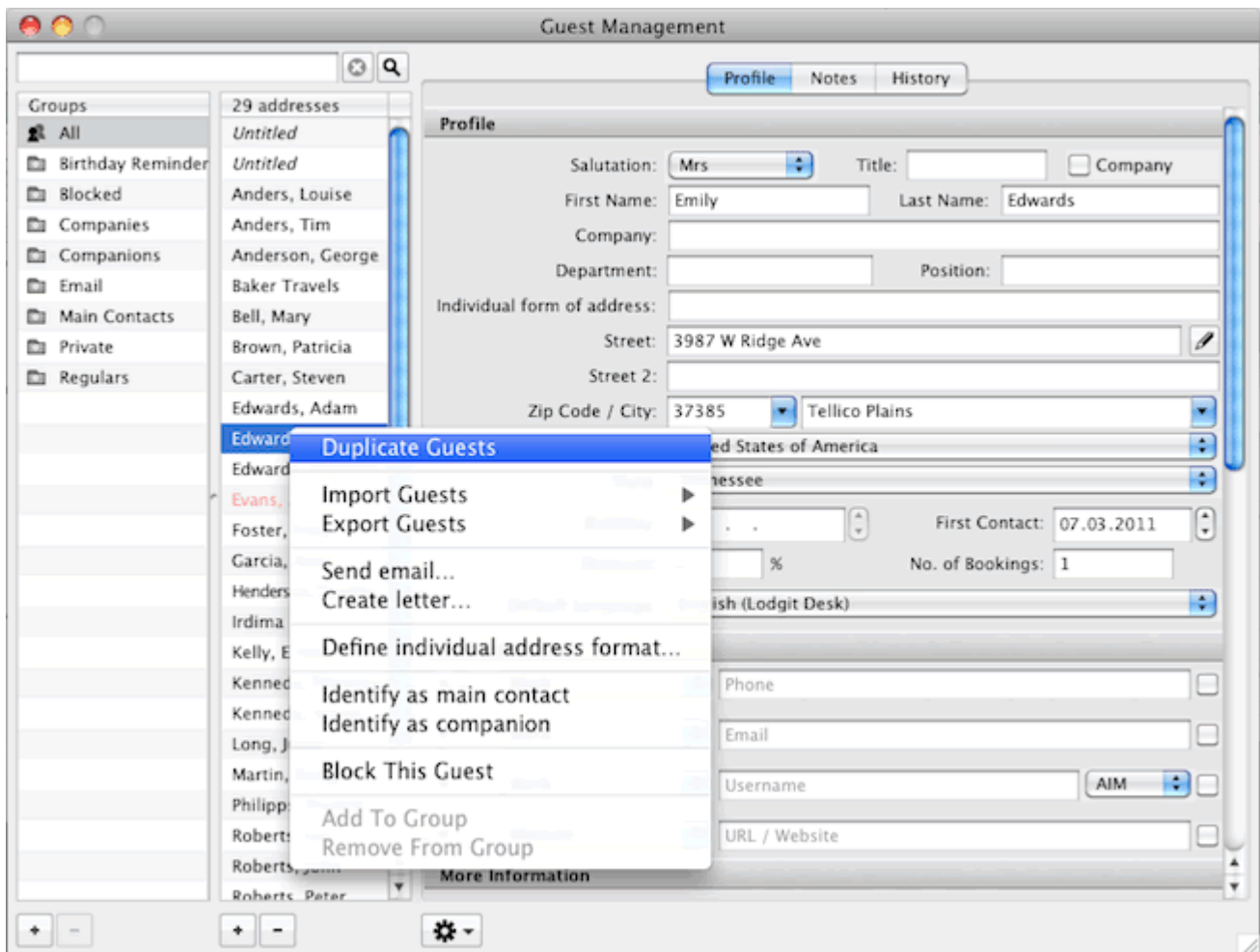
Delete guest

1. Open the Guest Management.

2. Select the guest you want to delete in the guest list and then press the button [−].

When deleting a guest you will be asked to confirm the process.
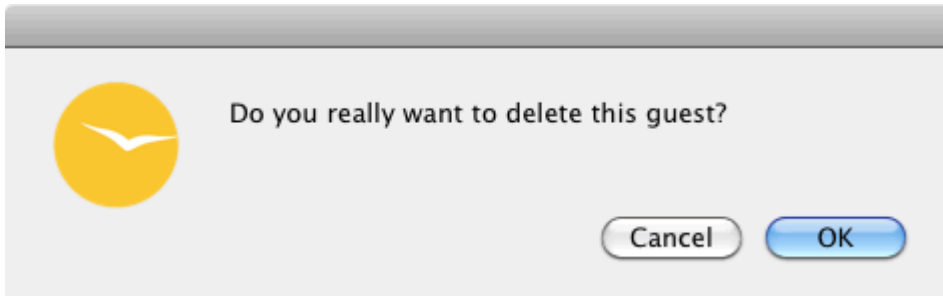
If you want to delete the guest, press **OK**.

The persons assigned to the automatic group "Prospectives" can be deleted at any time, since they are neither entered as Main Contact or Companion in a booking nor are they the recipients of an invoice or a receipt.

GUEST MANAGEMENT   UP   MERGE GUESTS

Merge guests

When working with the hotel software for a longer period of time, it can happen that guests are accidentally created more than once. In this case, one speaks of duplicates or doublets. In Lodgit Desk, you have the option of combining these duplicates into **one** contact. In doing so, certain data can be taken over, if desired.

In your guest administration you will find a guest who has been created several times, as in the example.
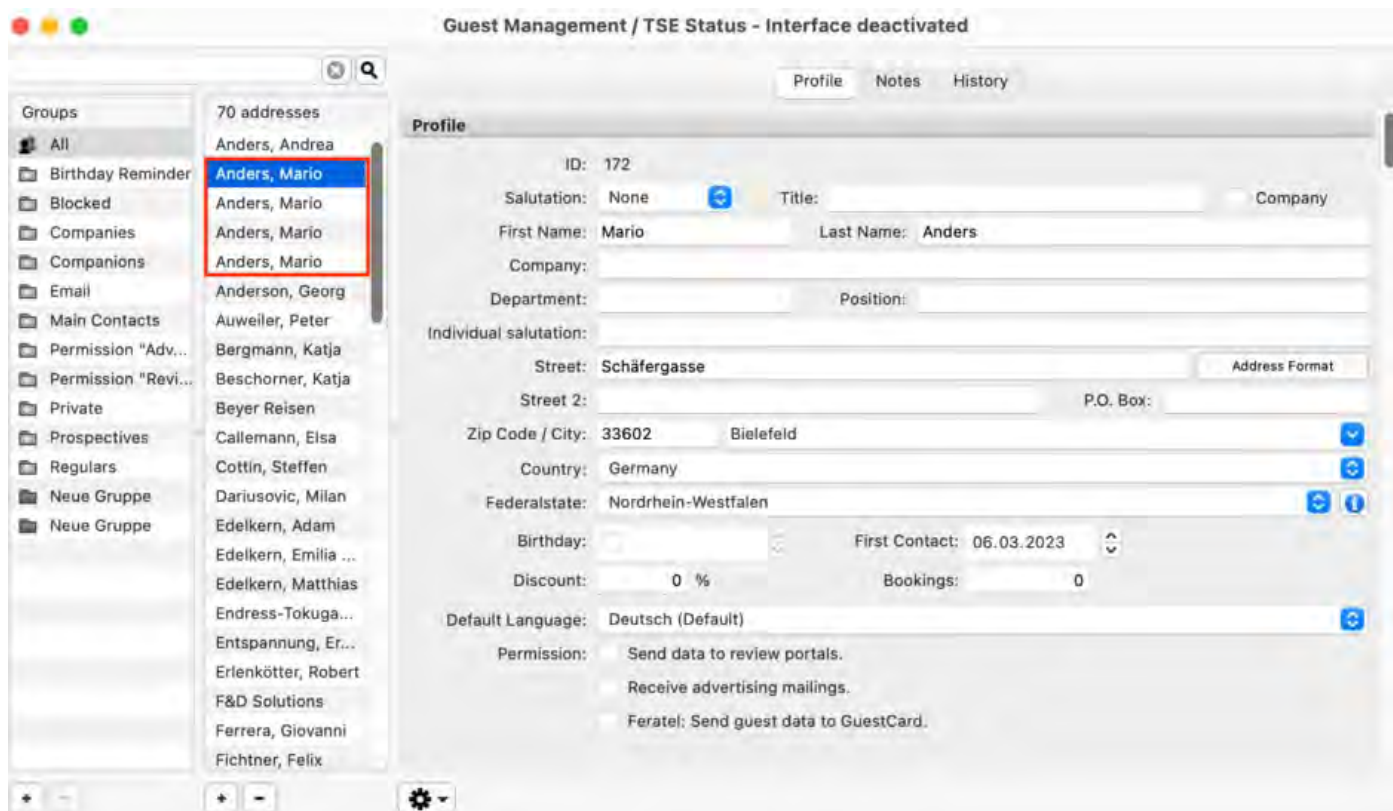
Highlight the contacts by holding down the shift key and pressing the up/down arrow keys several times until all duplicates are highlighted.
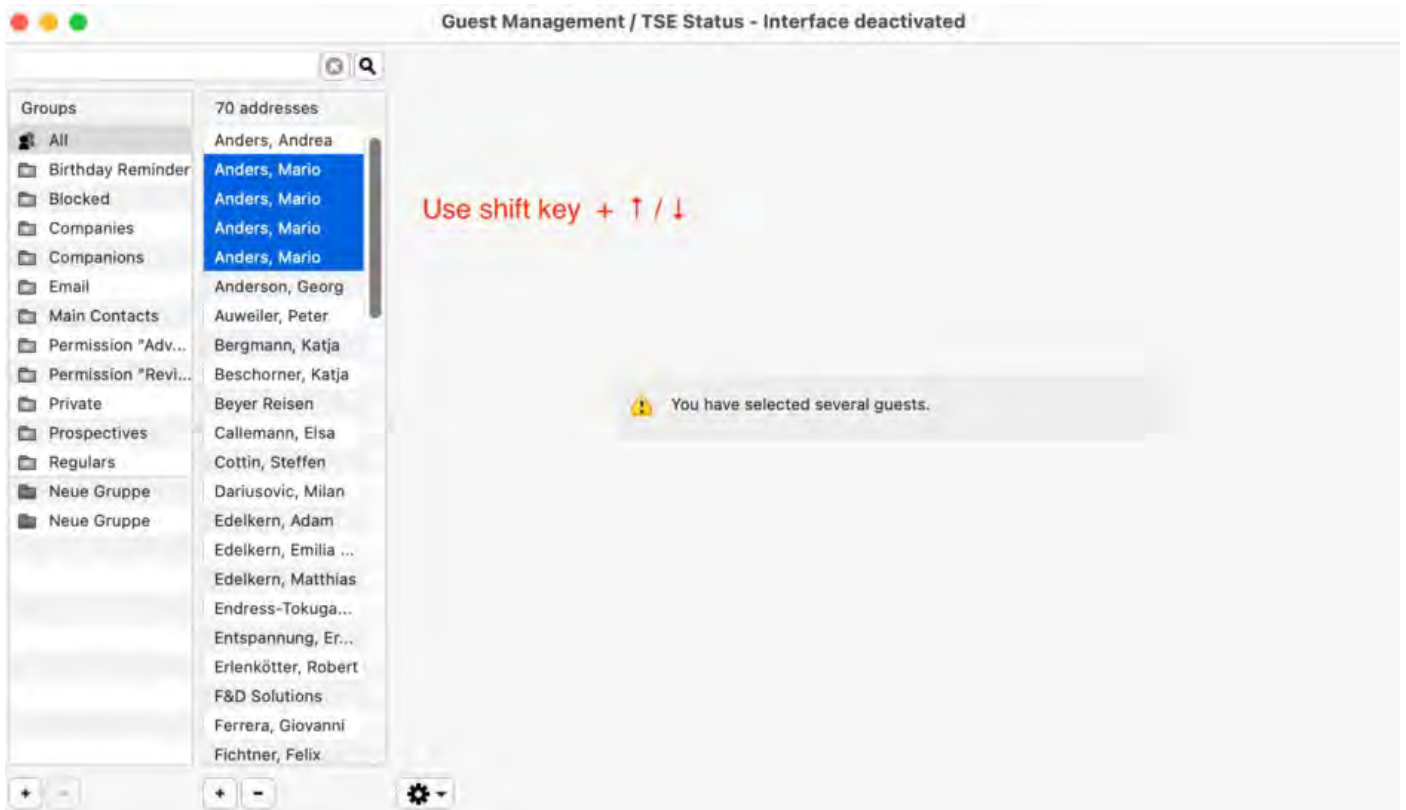
Now click on the right mouse button, the context menu appears. Select the function "Merge guests".
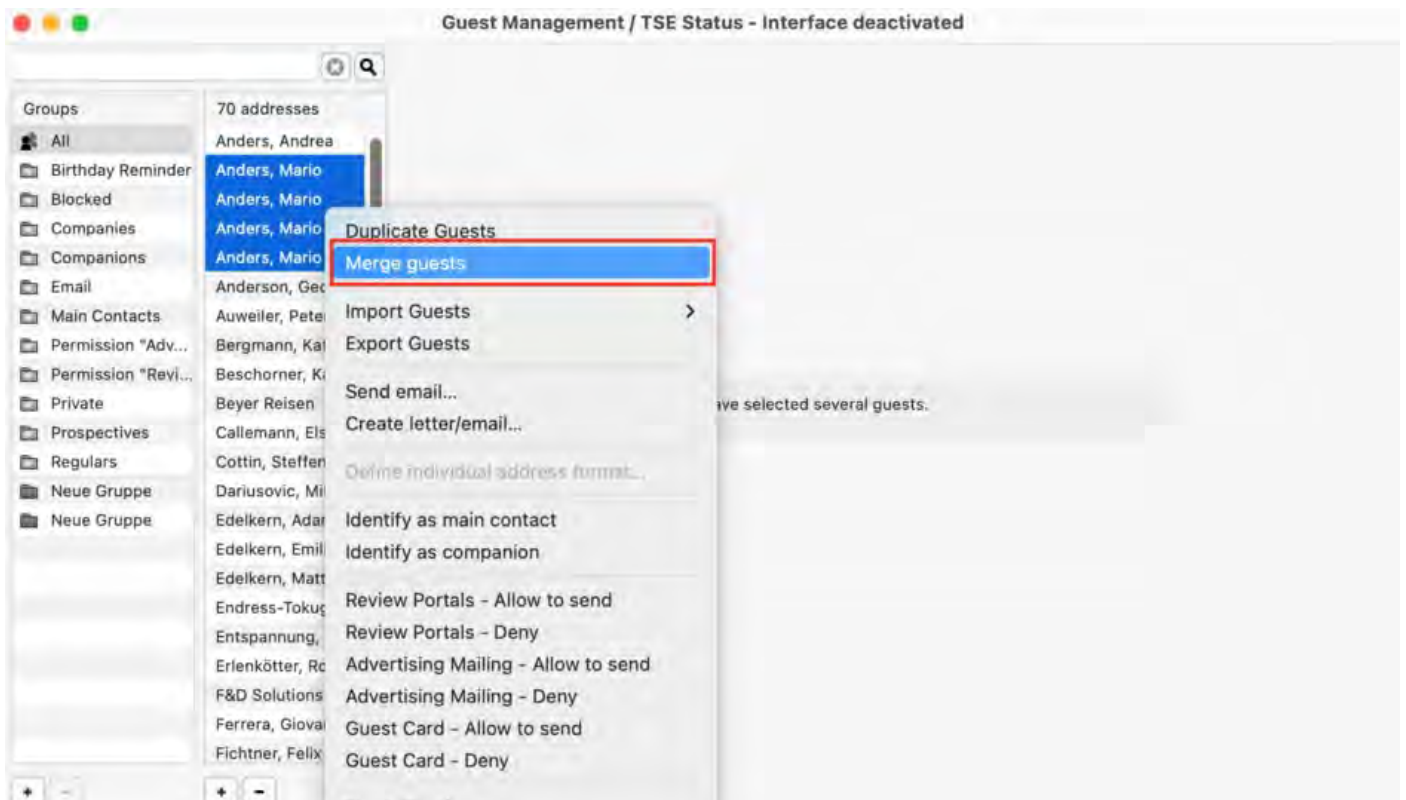
A new window opens in which you can now merge the guests. Select a contact and determine which information shall be transferred to this contact. Confirm your selection at the end with "Save".
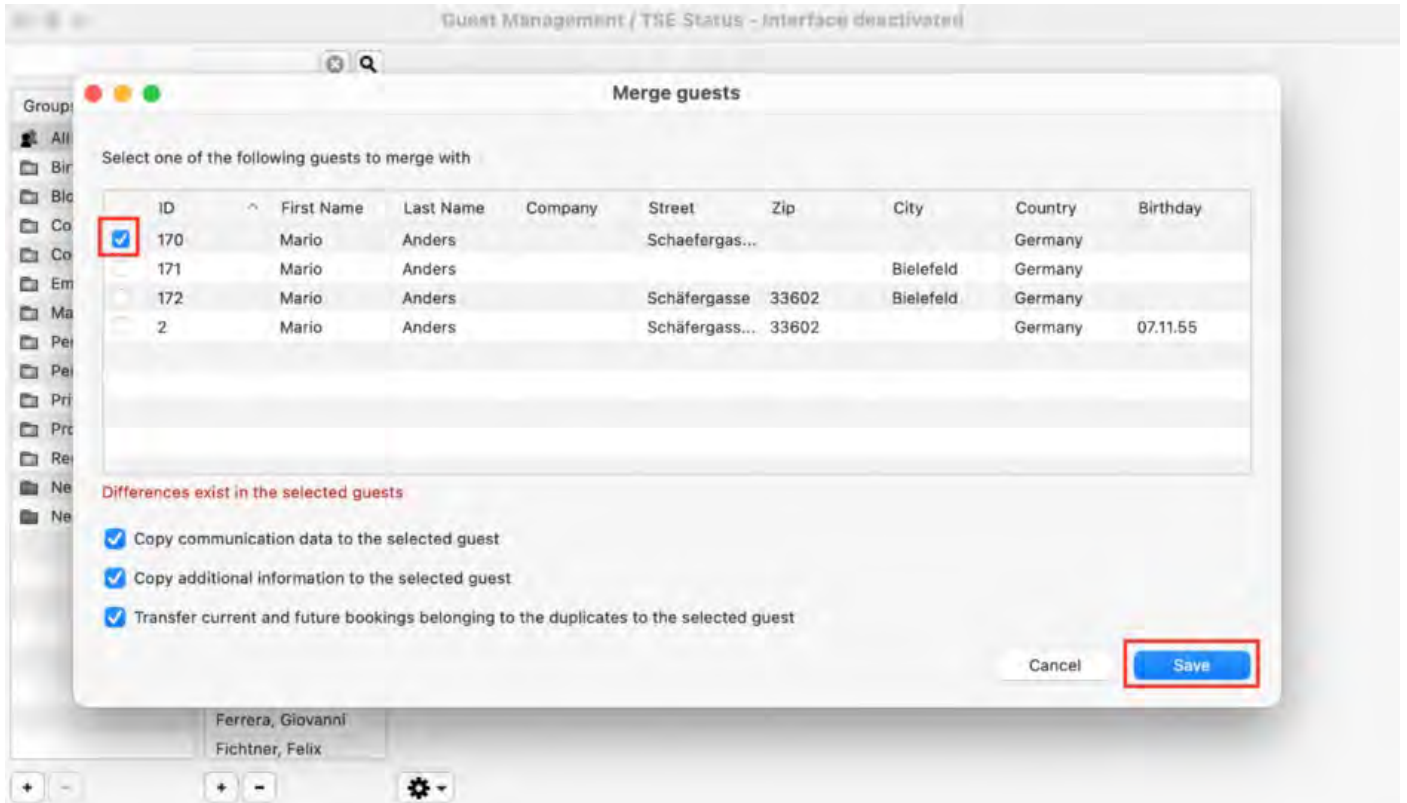
ADD / DUPLICATE / DELETE GUEST   UP   BLOCK GUEST

Block guest

You have the option of blocking a guest. This means that the guest cannot be added to any bookings as long as they are blocked.

1. Open the Guest Management.

2. Select the guest you want to block in the guest list.

3. In the context menu (right-click) or the Actions menu select the item **Block This Guest**.
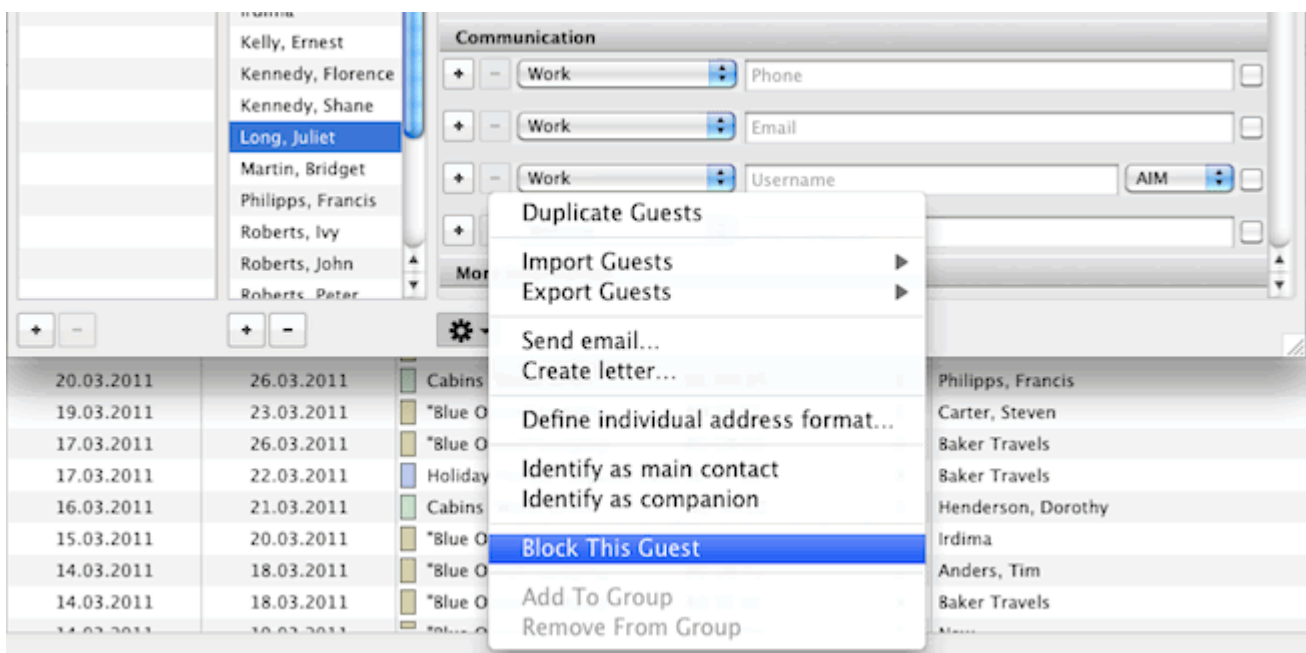
When the reason for blocking the guest has been resolved, you can use the context menu or the Actions menu to **Unblock** the **Guest**. This will allow the guest to be added to bookings again.

MERGE GUESTS   UP   AUTOMATIC AND CUSTOM GROUPS

Automatic and custom groups

The Guest Management of Lodgit Desk automatically provides **automatic groups** that are meant to help you with your guest management. You can also add **your own groups**, in order to add guests to a certain category or group (e.g. for bulk letters).

Automatic groups

1. Open the Guest Management.

2. Simply click on a group in the left list and the guests in this group will be shown in the list next to it.

These are the automatic groups:

All	All guests
Blocked	Guests that are blocked
Companies	Guests that are companies
Companions	Guests that have only been listed as companions so far
E-Mail	Guests that have listed one or more email addresses
Main Contacts	Guests that have been listed as a main contact for a booking
Permission "Advertising Mailing"	Guests that agreed to receive advertising mailings
Permission "Review Portals"	Guests that have given their permission to send their data to the re
Private	Guests that are not companies
Prospectives	Persons who are NOT registered as Main Contact or Companion in a who are NOT the recipient of an invoice or receipt.
Regulars	Guests that are regulars ✳ according to your preferences

Custom groups

To add your own guest groups do the following:

1. Open the Guest Management.

2. Press the plus button below the group list. This will create a new group called "New Group"
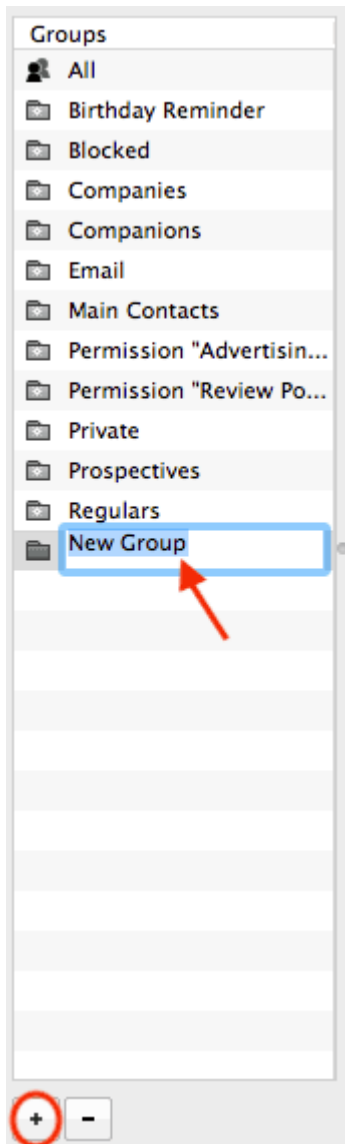
3. Double-click on the name and enter the name you like.

> *Note:*
> *Your own groups will always be sorted alphabetically below the automatic groups.*

Add guests to a group

When you create a new group it doesn't have any guests, yet, of course. This is how you add guests to a group:

1. Click on the group **All** which will show you all your guests.

2. Select the guest(s) that you want to add to a group.

> *Tip:*
> *Hold down the CMD- or CTRL-key to select more than one guest at a time.*
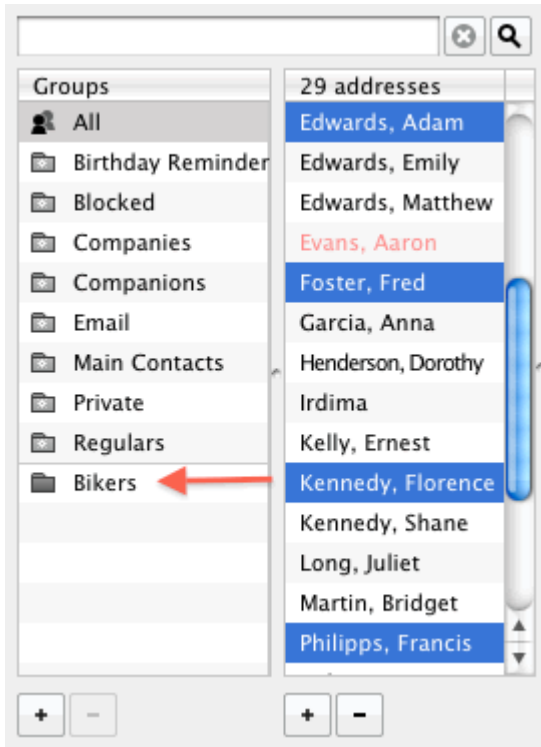
3. Drag the selected guests to your new group.

> ### *Alternative:*
> *You can also use the context menu (right-click) or the Actions menu* ⚙▾ *to select the item "Add To Group > ..."!*
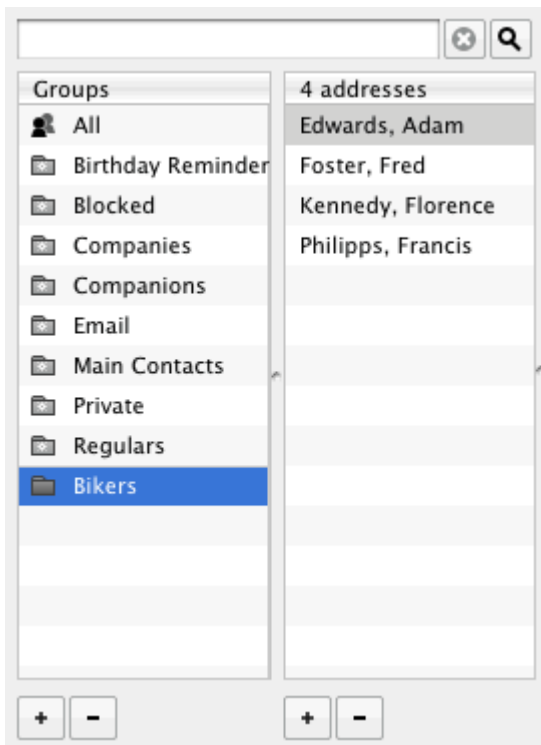
If you now select your group you will see that the guests you have dragged into this group are now a part of it.

Remove a guest from a group

To remove a guest from a group select them in the guest-list of the group and then chose the context menu item or Actions menu item "Remove From Group".

Duplicate Guests

Import Guests ▶
Export Guests ▶

Send email...
Create letter...

Define individual address format...

Identify as main contact
Identify as companion

Block This Guest

Add To Group ▶
Remove From Group ▶
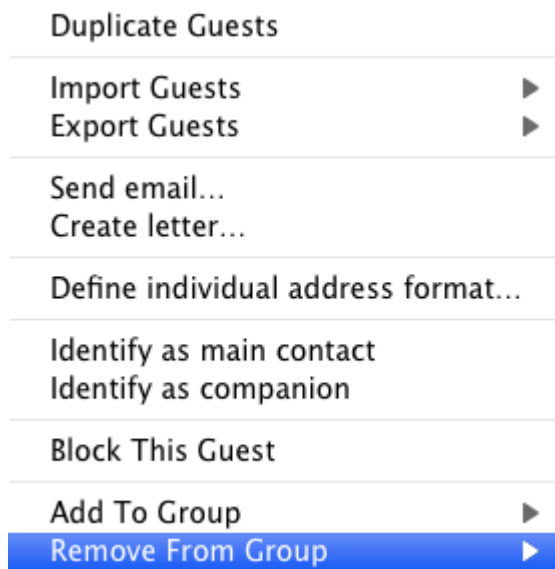
BLOCK GUEST   UP   SEARCH FOR A GUEST

Search for a guest

You have a search option in the **Guest Management**. This lets you look for a certain guest or specific data in your guest files.

1. Open the Guest Management.

2. Enter the word or characters that you want to look for in the search field at the top left and hit Enter (or click on the search button).
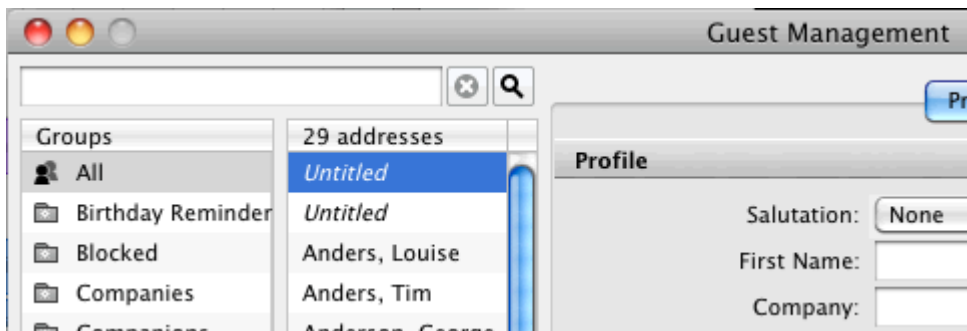
You can separate several search words by using a space. These words will then automatically be searched with an AND-conjunction.

The search will look through all the data in the Guest Management. It does not matter whether a guest is blocked or active.

> **Note:**
> *The notes area of a guest will be searched as well!*

You don't have to enter complete words into the search, but the search does get more specific results the longer the word is. If you enter the letters **th**, then all guest data that contain the letters **th, TH, Th** will be shown.

If you make the word longer, such as **Smith**, the search result will be more specific.

You can also use the **universal placeholder ***.
Example: A search for 'gon*alez', the search will find 'gonzalez' as well as 'gonsalez'.

AUTOMATIC AND CUSTOM GROUPS　　UP　　SEND EMAILS

Send emails

Send an email to a guest

1. Open the Guest Management and select the guest that you want to send an email to.

2. Select the item **Send email** from the **Actions** or the **context menu**. This will open an email window with the email address of the guest.

3. Write and send the email.

Send an email to several guests

1. Open the Guest Management and select the guests that you want to send an email to.

2. Select the item **Send email** from the **Actions** or the **context menu**. This will open an email window with the email address of the guests.

3. Write and send the email.

> ### *Note:*
> *To quickly view which guests have an email address listed in their profile, select the automatic group "Email" which will only show those guests with an email.*
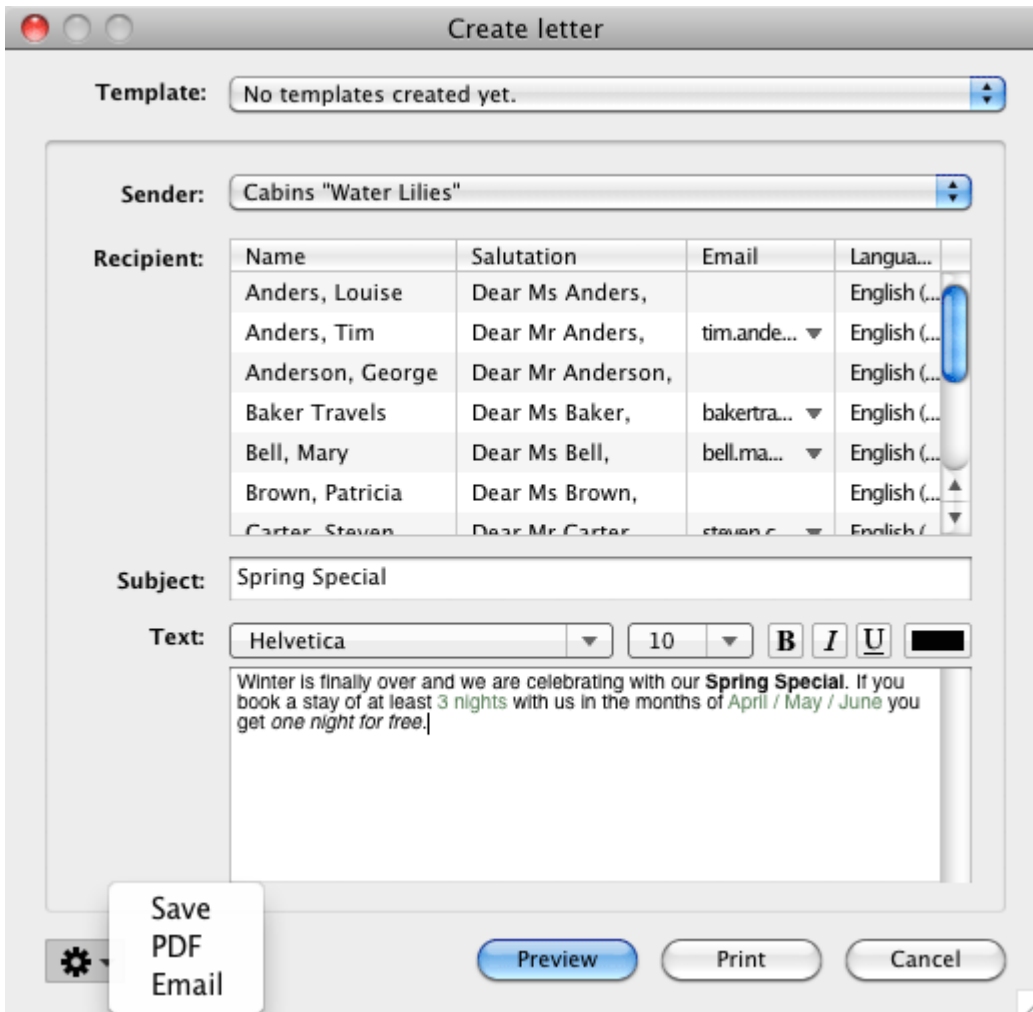
SEARCH FOR A GUEST　　UP　　WRITE (BULK) LETTERS AND EMAILS

Write (bulk) letters and emails

1. Open the Guest Management by going to **Administration > Guests** and select the guests you want to send the letter or email to in the guest list.

2. From the Actions menu ⚙▾ select the item **Create Letter**. You can also select this item in the context menu (right-click). A window with all the recipients will open.

3. Select and object for the sender address.

4. Add a subject line and the content. You can edit your content with the **formatting options**. When you're done, you can print the letter(s), send it via email, save it as a PDF file on your computer or just save it in Lodgit Desk for later use.

Edit guest profile

1. Open the **guest profile** of the guest you want to edit in the Guest Management.

2. Edit the data

3. All changes will be saved automatically.

> *Important:*
> *If this contact is a **company**, make sure to check the box that says so.*
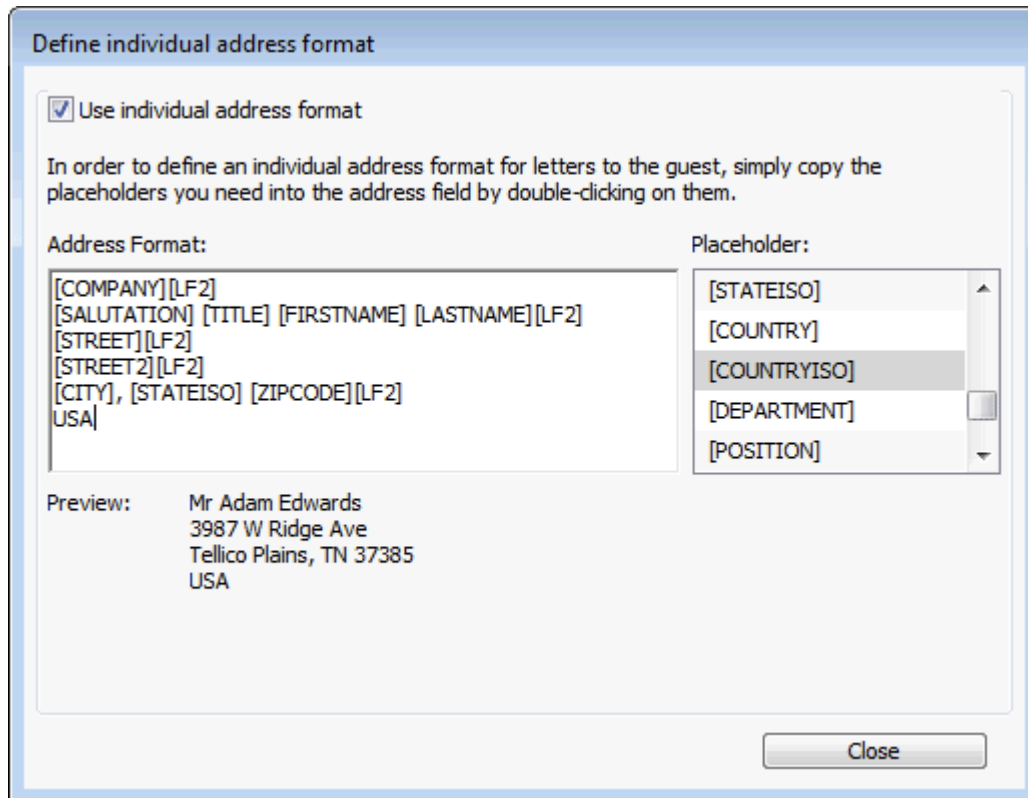
Individual form of address

Here, you can add a text that will be used as a salutation for all correspondence with

the guest - offers, confirmations, invoices, letters. If you leave this field empty, the default salutation "Dear Mr ..." and "Dear Ms ..." will be used.

Individual address format

If you click on the ✏️ button next to the street field, a new window will open that will let you define an individual address format. This will overwrite the preferences for country address formats.

Example:
In this example, the placeholder [COUNTRY] was removed and instead "USA" was put in.

No. of bookings

This field shows how many bookings the guest has already been attached to as a guest or main contact. Whenever the guest **checks out** this number will **increase automatically**.

> *Important:*
> *If this field was edited manually by you (e.g. if you want to make a guest a regular from the beginning) it will still increase automatically with each booking starting with the number you have entered.*
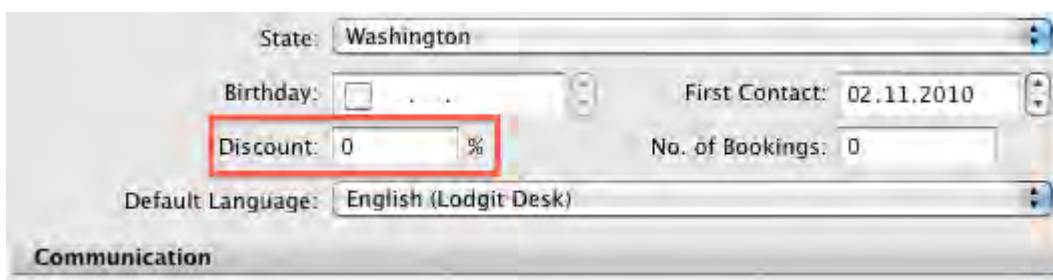
WRITE (BULK) LETTERS AND EMAILS   UP   DEFINE GUEST DISCOUNT

Define guest discount

You can add a personal **guest discount** to a guest that will then be given for every booking of the guest.

1. Open the Guest Management.

2. Select the guest that you want to add a discount to in the guest list and then go to **Profile**.

3. Enter the percentage in the field "Discount".
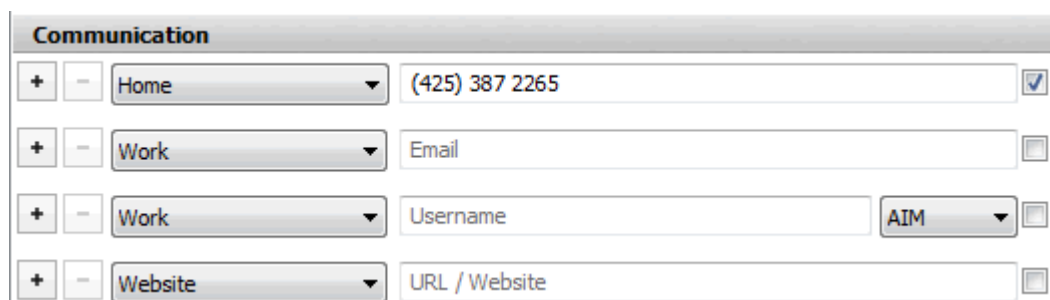
EDIT A GUEST'S PROFILE   UP   ADD AND EDIT COMMUNICATIVE AND OTHER DATA

Add and edit communicative and other data

You can add different ways to communicate for every guest in the Guest Management.

1. Open the Guest Management.

2. Select the guest you want to add information to from the guest list and then go to **Profile**.

3. Go to the are **Communication** and add the data.

4. If you add more than one phone number or email address, you can define one of them to be the **default** phone number or email address by checking the box next to it.
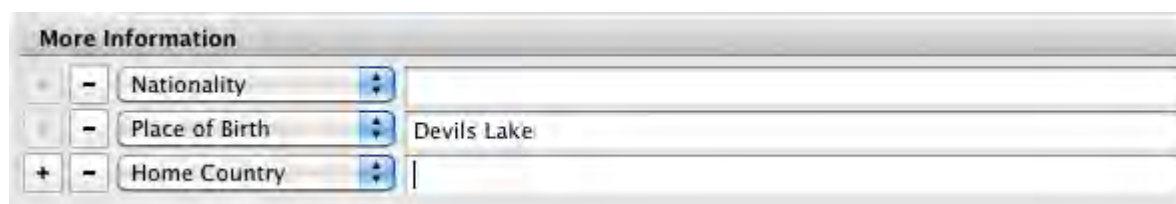
> **Note:**
> *The default email address will be used automatically for bulk emails.*

Add more data

You can also add more information for guests in the Guest Management.

1. Open the Guest Management.

2. Select the guest that you want to add data to in the guest list and then go to **Profile**.

3. Go to the area **More Information** and add the data.

4. If the default labels are not sufficient for you, you can add your own labels by selecting the item "Custom" from the drop down menu:
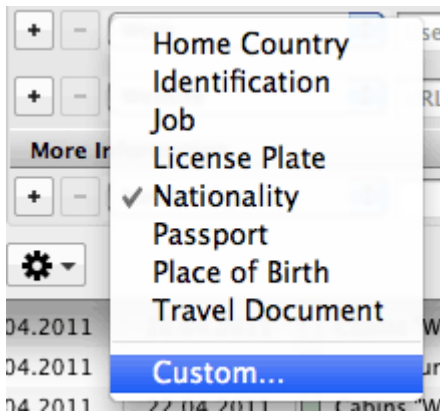
Ex.: Select "Custom" to create a new label.

Note: The labels created by Lodgit Desk can only be used once per every guest whereas your own labels can be used multiple times!

Permission to send data to review portals

Tick the checkbox if the guest has given his permission to send his data to a review manager. Then the contact will be added to the automatic group "Permission Review Portals".
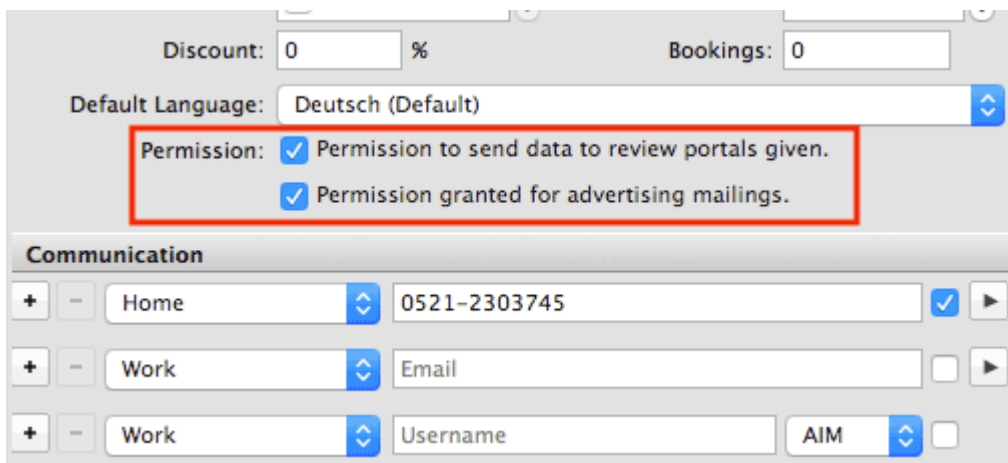
Permission for advertising mailings

If your guests have given you their permission to receive advertising mailings, tick the checkbox. These guests will be listed in the automatic group "Permission Advertising Mailings".

DEFINE GUEST DISCOUNT   UP   ADD AND EDIT NOTES TO A GUEST

Add and edit notes to a guest

You can add new notes to every guest about their preferences, concerns etc. You can also edit existing notes.

1. Open the Guest Management.

2. Select the guest whose notes you want to edit.

3. In the right area, go to **Notes** and add or edit notes.
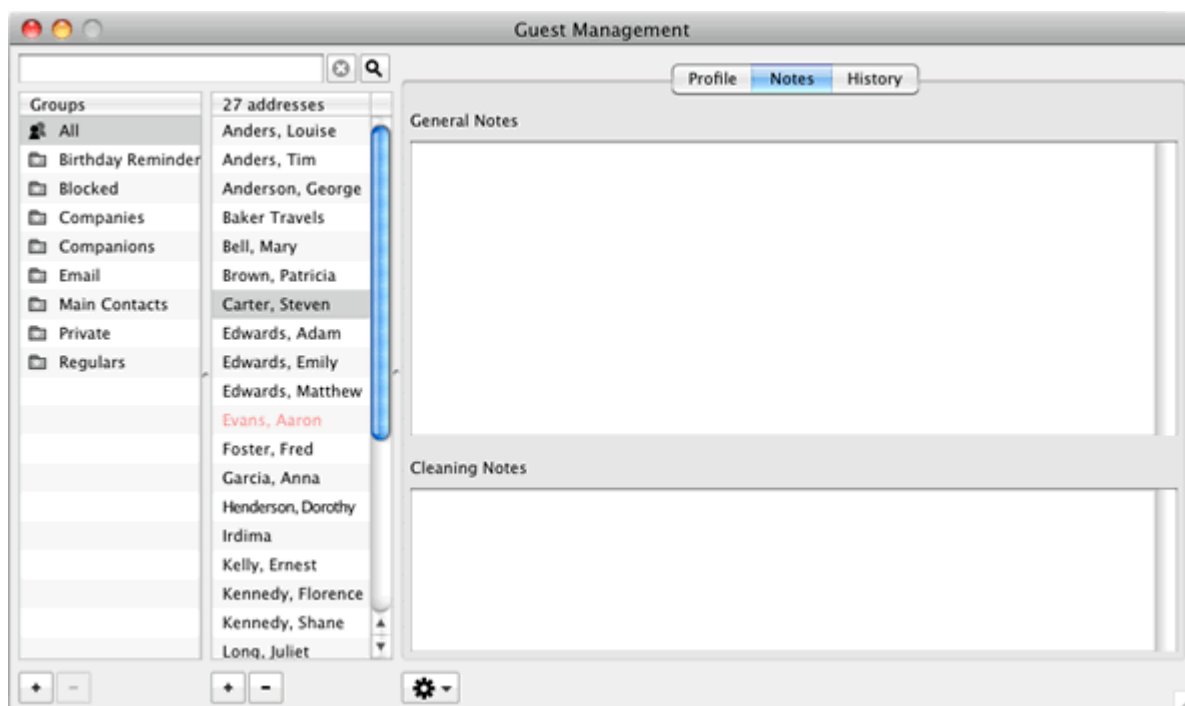
> **Note:**
> *Whenever a note is added to a guest, the* ⓘ *will appear next to their name in the booking window entry Guests. If you hover your cursor over the symbol, the note will be shown in a QuickInfo.*

ADD AND EDIT COMMUNICATIVE AND OTHER DATA   UP   GUEST HISTORY

Guest history

To manage the history of a guest, go to **Administration > Guests** or click on the **Guests** button above the reservation schedule.

This will open the window **Guest Management**.

Now go to **History**.
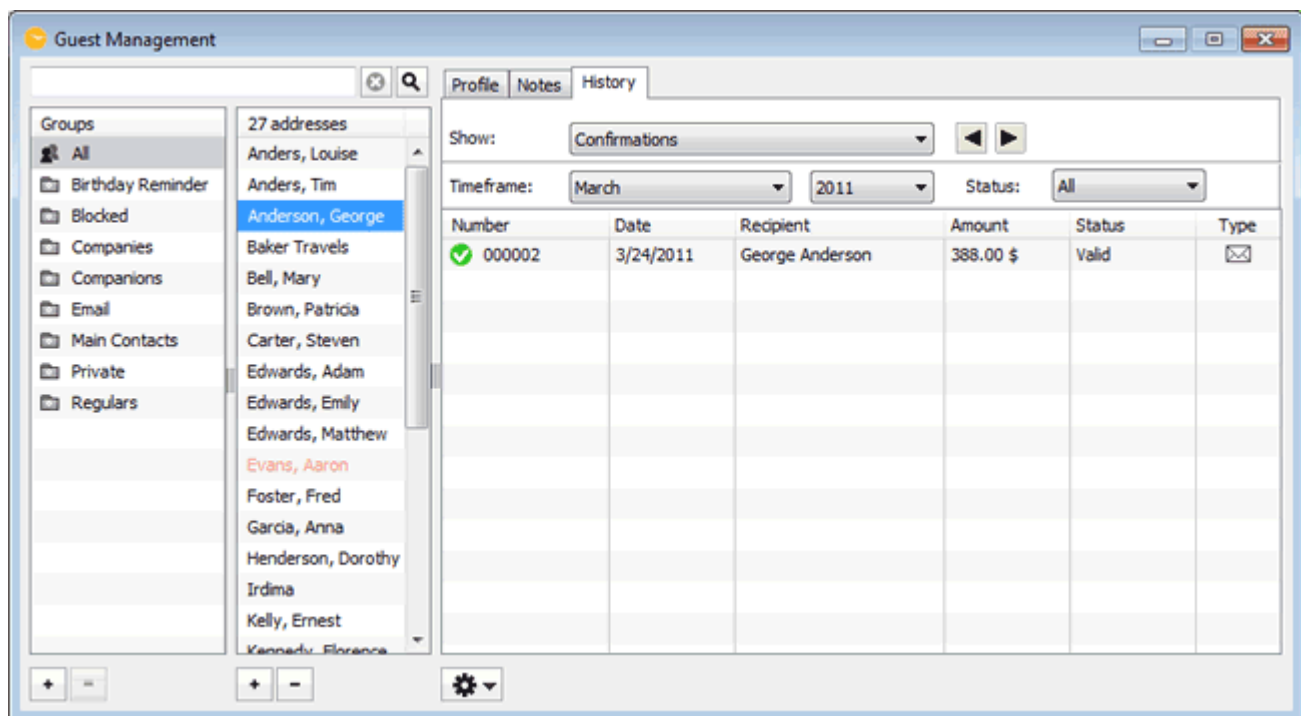
The history area in the Guest Management allows you to do the following:

- Manage offers
- Manage confirmations
- Manage invoices
- Manage correspondences
- View cash receipts

- View companions
- View all bookings of this guest

ADD AND EDIT NOTES TO A GUEST   UP   VIEW/PRINT OFFERS FOR A GUEST

View/print offers for a guest

In the **History** under **Show > Offers** you can view all the offers that have ever been created for this guest using Lodgit Desk.

1. Open the Guest Management.

2. Select the guest in the guest list.

3. Go to **History** and then select **Offers** in the "Show" drop down menu.
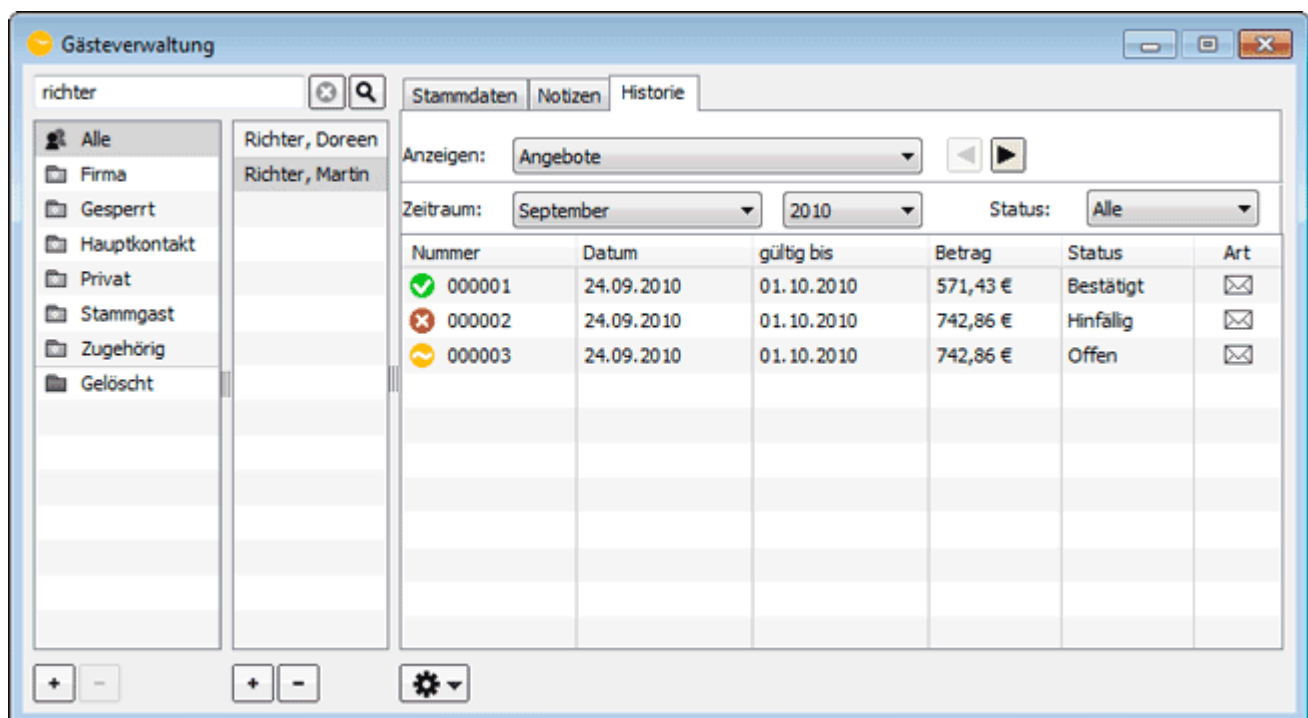
These offers can have the following status:

Symbol	Status	Description
✅	confirmed	Whenever a booking receives the status **Confirmed** or **Booked**, th offer will be set to **confirmed**.
🟡	open	As long as a booking with an offer does not have the status **Confir** the status of the offer is **open**.
❌	invalid	After deleting a booking with an offer, the status of the offer is aut **invalid**. This also happens when the booking time frame is change

You can filter the search by selecting a **time frame** for which the offers will be listed.

You can also filter the search by only showing offers with a certain **status**. Simply select the status you want to be shown in the drop down menu on the right.

> *Note:*
> *You can sort the list of the guest history by its columns by clicking on the column header. Clicking once will sort the list by this column in descending order, clicking again will sort it in ascending order.*

You can use the context menu of a list item (right-click), double-click on it or use the Actions menu ⚙▾ to quickly open the booking corresponding to the offer. You can also print the offer again.

GUEST HISTORY   UP   VIEW/PRINT CONFIRMATIONS FOR A GUEST

View/print confirmations for a guest

1. Open the Guest Management.

2. Select the guest in the guest list.

3. Go to **History** and then select **Confirmations** in the drop down menu "Show".
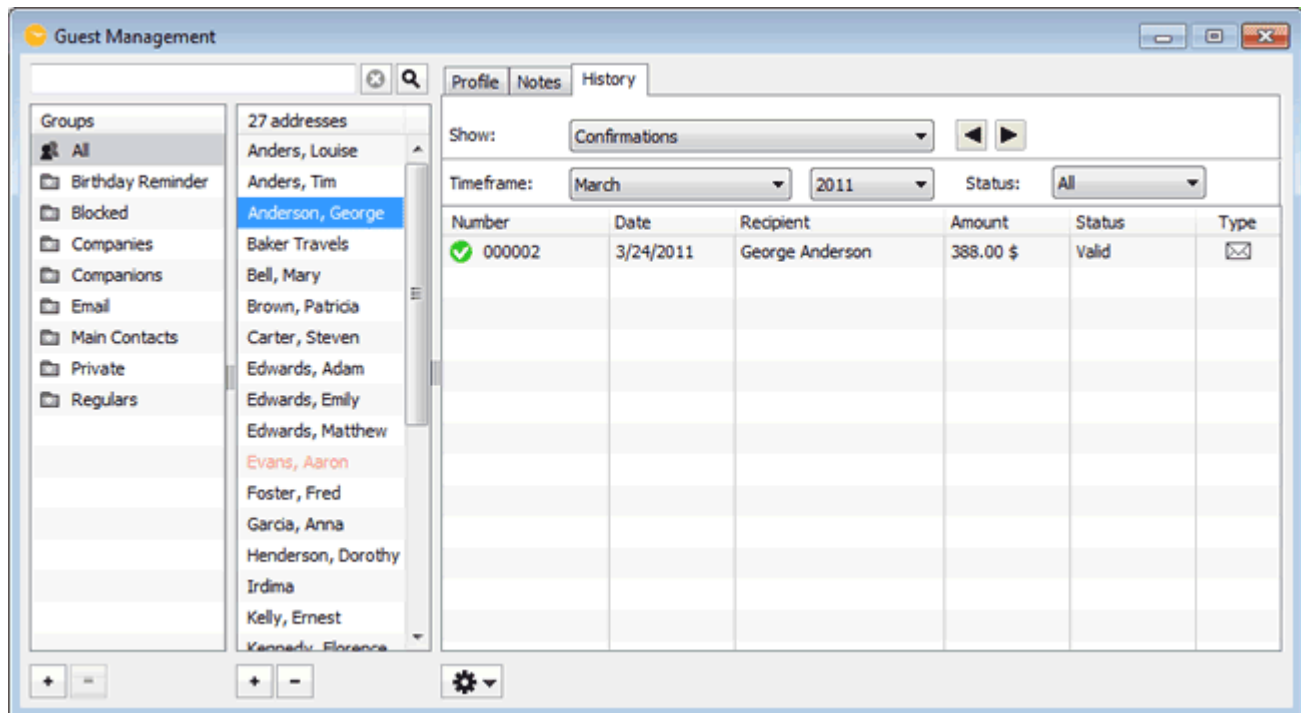
Here you will find all **confirmations** that have ever been printed for this guest using Lodgit Desk. You can filter the search by selecting a **time frame** for which the confirmations will be listed.

You can also filter the search by only showing confirmations with a certain **status**. Simply select the status you want to be shown in the drop down menu on the right.

> *Note:*
> *You can sort the list of the guest history by its columns by clicking on the column header. Clicking once will sort the list by this column in descending order, clicking again will sort it in ascending order.*

You can use the context menu of a list item (right-click), double-click on it or use the Actions menu [icon] to quickly open the booking corresponding to the confirmation. You can also print the confirmation again.

VIEW/PRINT OFFERS FOR A GUEST   UP   VIEW/PRINT INVOICES FOR A GUEST

View/print invoices for a guest

1. Open the Guest Management.

2. Select the guest in the guest list.

3. Go to **History** and then select **Invoices** in the "Show" drop down menu.
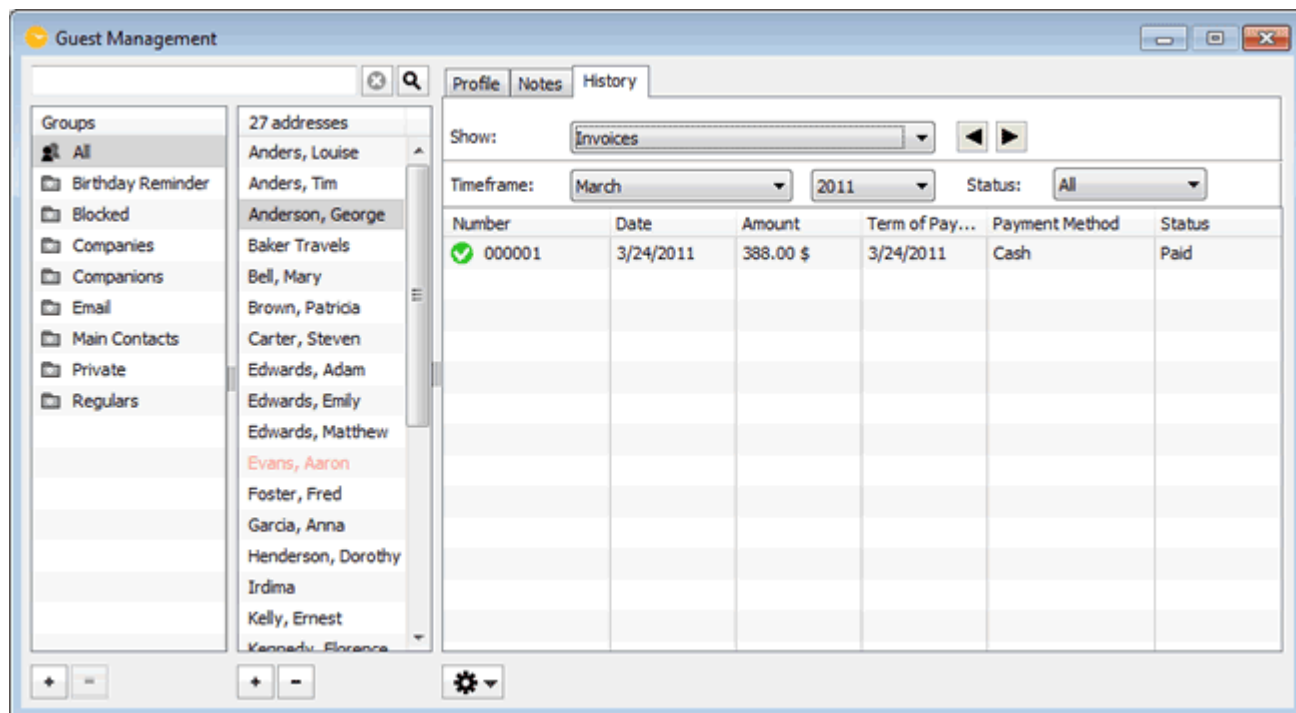
Here you will find all **invoices** that have ever been created for this guest using Lodgit Desk.

Symbol	Status	Description
✅	paid	Whenever an invoice is paid you can change its status to **paid** using the context menu.
🟠	open	All invoices that have not been paid have the status **open**.
❌	cancelled	You can also **cancel** an invoice using the context menu.

Using the context menu you can print out the invoice again.

Number	Date	Recipient	Due Date	Payment Method	Amount
✓ 11-0028	21.0	Open Booking...		Cash	870,00 €
		Cancel Invoice and Send Letter			
		Cancel Invoice			
		Print invoice			
		Print invoice with preview			

You can filter the search by selecting a **time frame** for which the invoices will be listed.

You can also filter the search by only showing invoices with a certain **status**. Simply select the status you want to be shown in the drop down menu on the right.

> *Note:*
> *You can sort the list of the guest history by its columns by clicking on the column header. Clicking once will sort the list by this column in descending order, clicking again will sort it in ascending order.*

VIEW/PRINT CONFIRMATIONS FOR A GUEST   UP   VIEW CORRECTIVE INVOICES FOR A GUEST

View/print corrective invoices for a guest

1. Open the Guest Management.

2. Select the guest in the guest list.

3. Go to **History** and then select **Corrective Invoices** in the drop down menu "Show".

Here you will find all corrective invoices that have been created for the guest. You can see when the corrective invoice was created, how much and whether the money was refunded.

Symbol	Status	Description
✅	paid	The corrective invoice has been paid.
🟡	open	The corrective invoice has not been paid, yet.
❌	unpaid invoice	The invoice for this cancellation credit had the status "open", thus no money has to be refunded.

You can change the status of paid and unpaid corrective invoices with the right-click-menu.

You can filter the search by selecting a **time frame** for which the invoices will be listed. You can also filter the search by only showing invoices with a certain **status**. Simply select the status you want to be shown in the drop down menu on the right.

> *Note:*
> *You can sort the list of the guest history by its columns by clicking on the column header. Clicking once will sort the list by this column in descending order, clicking again will sort it in ascending order.*

VIEW/PRINT INVOICES FOR A GUEST   UP   VIEW DUNNING NOTICES FOR A GUEST

View dunning notices for a guest

1. Open the Guest Management.

2. Select the guest in the guest list.

3. Go to **History** tab and then select **Dunning Notices** in the "Show" drop down menu.

Here you will find all **dunning notices** that have ever been created for this guest using Lodgit Desk.

You can see which invoices are late in payment, when the notice was issued, the total amount of the invoice as well as dunning fees imposed and whether the invoice has been paid or not send to them.

Symbol	Status	Description
✓	paid/cancelled	The corresponding invoice was paid or cancelled.
◷	open	The corresponding invoice has not been paid.
✗	downgraded	The dunning level was downgraded.

Here you can also see whether dunning fees were paid by the guest when paying the invoice or not.

You can filter the search by selecting a **time frame** for which the dunning notices will be listed.

You can also filter the search by only showing notices with a certain **status**. Simply select the status you want to be shown in the drop down menu on the right.

> *Note:*
> *You can sort the list of the guest history by its columns by clicking on the column header. Clicking once will sort the list by this column in descending order, clicking again will sort it in ascending order.*

VIEW CORRECTIVE INVOICES FOR A GUEST   UP   VIEW/EDIT AND ADD CORRESPONDENCE

View/print correspondence for a guest

1. Open the Guest Management.

2. Select the guest in the guest list.

3. Go to **History** and then select **Letters/Emails** in the drop down menu "Show".

Here you will find all letters and emails that have ever been sent to the guest using Lodgit Desk.

You can filter the search by selecting a **time frame** for which the correspondence will be listed.

> ### *Note:*
> *You can sort the list of the guest history by its columns by clicking on the column header. Clicking once will sort the list by this column in descending order, clicking again will sort it in ascending order.*

You can use the context menu of a list item (right-click), double-click on it or use the Actions menu ⚙▾ to edit the correspondence, print it again or create a new letter.

View companions of a guest

You can view all **companions** (i.e. guests that have travelled and checked in with the guest) in the guest history.

1. Open the Guest Management.

2. Select the guest in the guest list.

3. Go to **History** and then select **Companions** in the "Show" drop down menu.

The guests that are listed in bookings along with the guest will be listed here automatically whenever they are added to the booking window.

Double-click on a guest or use the context menu to go to their profile.

> *Note:*
> *You can sort this list by its columns by clicking on the column header. Clicking once*

will sort the list by this column in descending order, clicking again will sort it in ascending order.

VIEW/EDIT AND ADD CORRESPONDENCE   UP   SEE ALL BOOKINGS OF A GUEST

View all bookings of a guest

1. Open the Guest Management.

2. Select the guest in the guest list.

3. In the guest profile area select **History** and show the **Bookings**.

Here you will find all bookings that the guest has been attached to as either a **Main Contact** or a **Companion**.
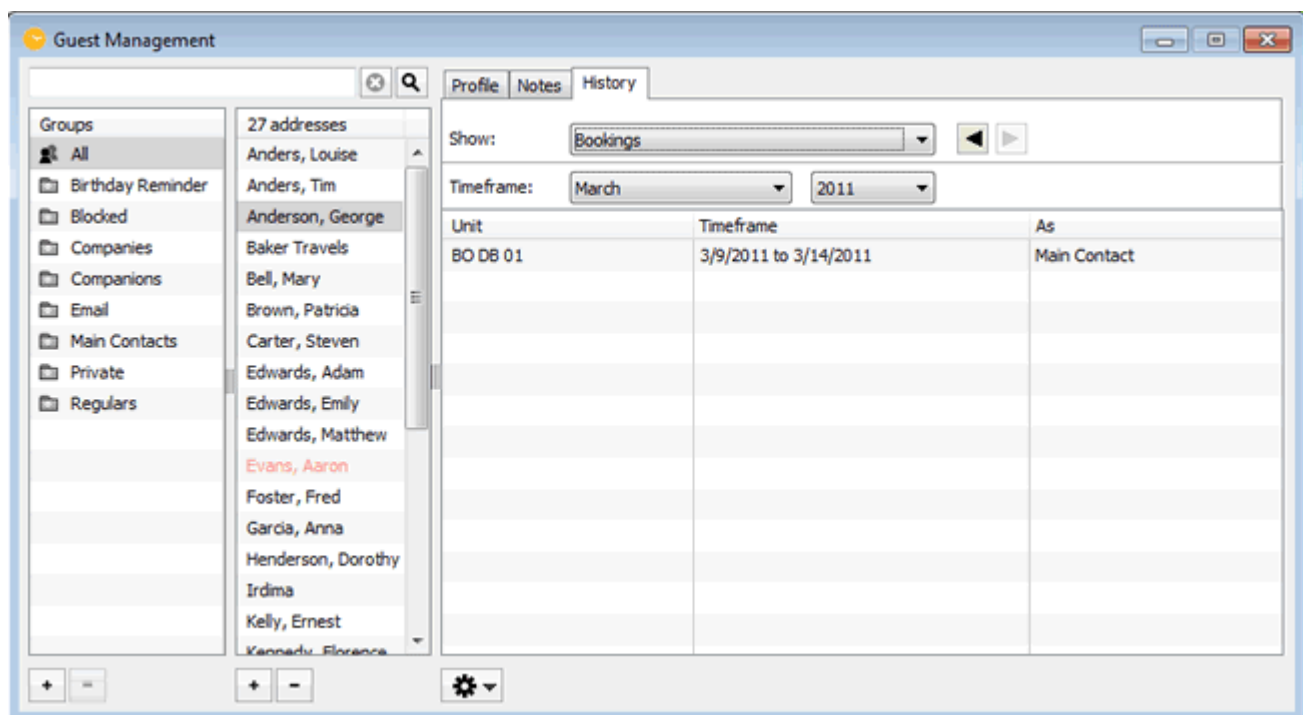
You can filter the list by selecting the **timeframe** for which the bookings will be listed.

> *Note:*
> *You can sort the list of the guest history by its columns by clicking on the column header. Clicking once will sort the list by this column in descending order, clicking again will sort it in ascending order.*

Using the context menu, which you can call up by right-clicking on a list item, double-clicking or the Actions menu you can directly open the booking that corresponds to the list item.

VIEW COMPANIONS OF A GUEST   UP   IMPORT GUEST DATA

Import guest data

Import guest data from CSV file

To import guest data from a CSV file, go to Guest Management and use the Actions menu to select the item **Import > CSV file**. Then, select the file that you want to import and open it (or drag the file directly into your Guest Management.

This will open the window **Import**.

Make sure that the data in the CSV file is correctly displayed in the preview area. If not, try selecting a different text encoding, separator or text separator. In the first line, you have to select the attribute for each column. You can only assign attributes to the columns that are already created in Lodgit Desk. If your CSV file has columns whose contents you would like to import, create the corresponding attribute under >Add more data.

Important:
The first line of your file, displayed in bold type, will not be imported by default! That's because most often, the first line contains column headings.

When you're done, press **OK**. This will import the guests into your Guest

Management.

> **Note:**
> *If Lodgit Desk finds duplicate guest data, this warning will appear:*

If you want to add a second guest file to your database, press **Save**, otherwise press **Cancel**.

If you want to choose this action (creating a new guest file or ignoring the duplicate data) for every duplicate guest, check the box that says "Repeat this action the next time this happens".

Import guest data from vCard

To import guest data from a **vCard**, open the Guest Management and select the menu item **Import Guests > vCard** from the **Actions** menu. Then you should select the **vCard** file that you want to import from and open it. You can also just drag and drop the file directly into the Guest Management.

A window will open.

Make sure that the data of the vCard is shown correctly. You might have to adjust the text encoding. When you are done, press **OK**.
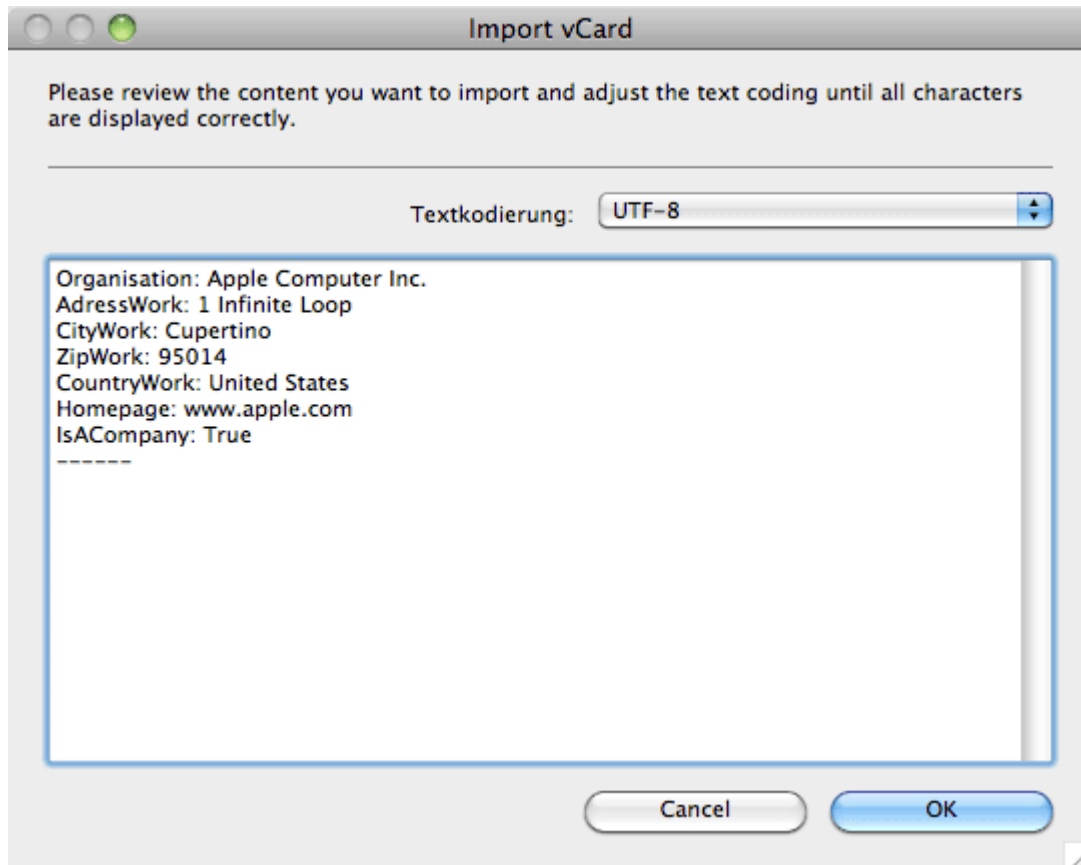
This will import the data of the guests into Guest Management.

It's possible to import several vCards from one file.

vCard:

A vCard (*.vcf) is an "electronic business card". You can use this to export contact information from e.g. an email program and import them into another program.

Export guest data

Export guest data for a bulk letter

1. Open the Guest Management and select the data you want to export.

2. In the **Actions** menu (or context menu) select **Export Guests > CSV file**.

3. In the new window **Save** add a name and select a location for the file.

CSV file:

A CSV file (*.csv) is a text file created to save and exchange simply structured data. The values are separated by a semi-colon or a comma.

This will allow you to simply copy your data out of Lodgit Desk and import them into a different program (such as Email or Excel).

Import guest data   Up   User Management

User Management

User Management Overview
Create Users and Profiles
User Roles and Rights
Overview of Predefined User Roles

User Management Overview

First login as Administrator (SysAdmin)

In Lodgit Desk, you have the possibility to create specific user profiles for your employees with the additional module 'User Management'. Particularly in larger accommodation businesses, where several people work with Lodgit Desk, you can control access rights to functions and data sets.

For the use of this module you have the possibility as a system administrator (SysAdmin):

- take over predefined roles for different users (e.g. management, reception) or
- on the basis of these predefined roles, to assign individual access areas to people.

After you have purchased the User Management module in our store, please update your license data first. The login window will appear automatically.

Enter the following here and then click Login:

- username: admin
- password: admin

You are now logged in as a system administrator and have all rights and unlimited access to Lodgit Desk.

However, the first thing that appears is a security notice with a request to change the admin password. You can do this in the account settings (see below).
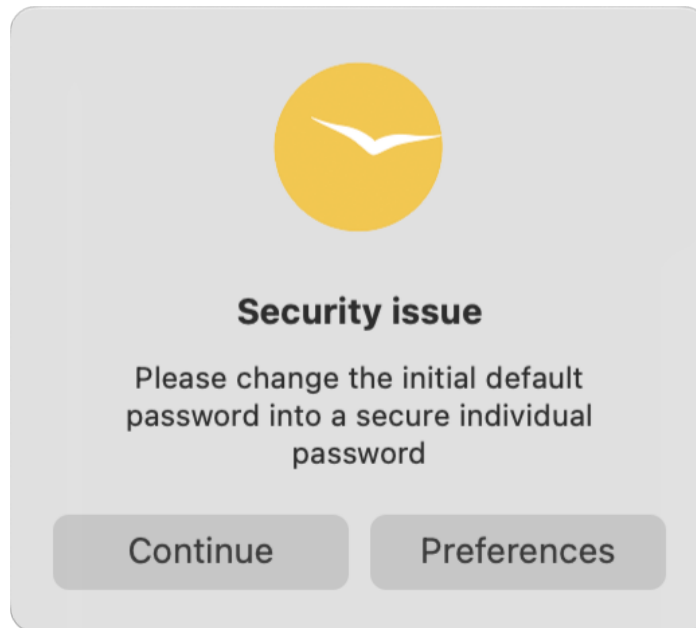
Login und Logout

The program bar shows that you are logged in. The user name of the person logged in (in this case Maria dos Santos) is displayed here. In addition, the yellow Logout icon is displayed.
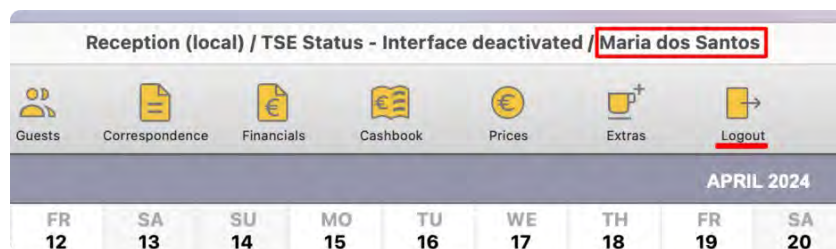
If you click Skip login, you will only be able to view the booking plan and the booking list. Editing any data in Lodgit Desk is not possible. The Restricted access message and the Login icon will appear in the program bar.
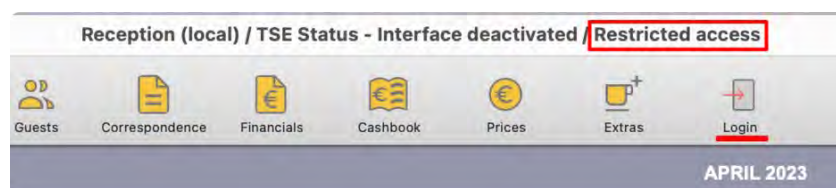
Change Passwords

Navigate to Settings > Account Settings, enter the default password admin and then a new password of your choice. Repeat the password and confirm the process with Update password.

Here, after creating a role, all users of Lodgit Desk can also change their passwords.

> **Note:** Your password must be at least **8 characters long**. It must also have at least 3 of the following characteristics: **Upper case letter, lower case letter, number, special character.**
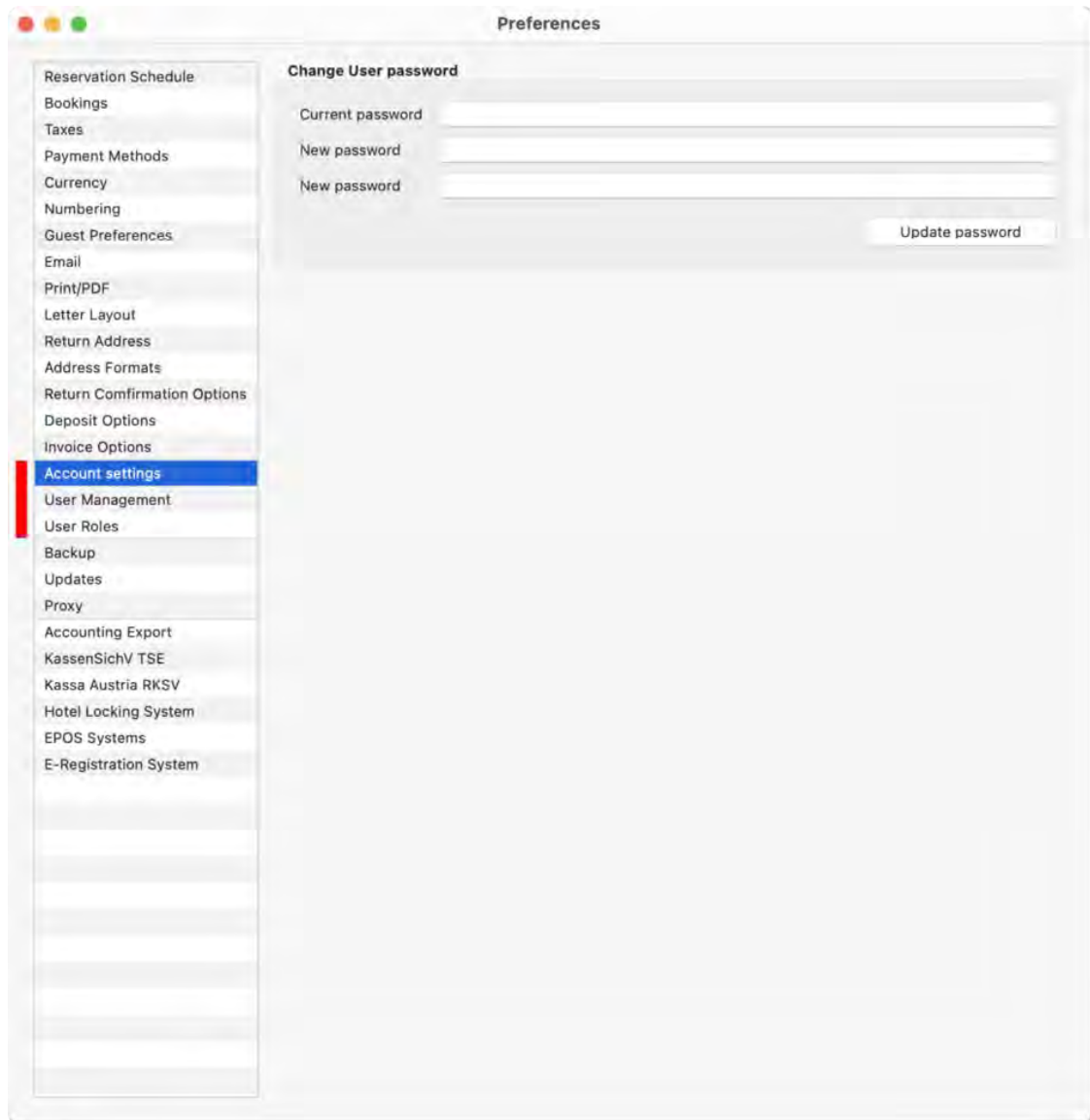
In the next step, you can now assign different profiles to all your employees.

Navigate to *Settings > >* *Create Users and Profiles* and enter the corresponding data.

USER MANAGEMENT   UP   CREATE USERS AND PROFILES

Create Users and Profiles

In the User Management section you can see all employees who already have different roles and access rights for Lodgit Desk. Use the PLUS icon to add new people.
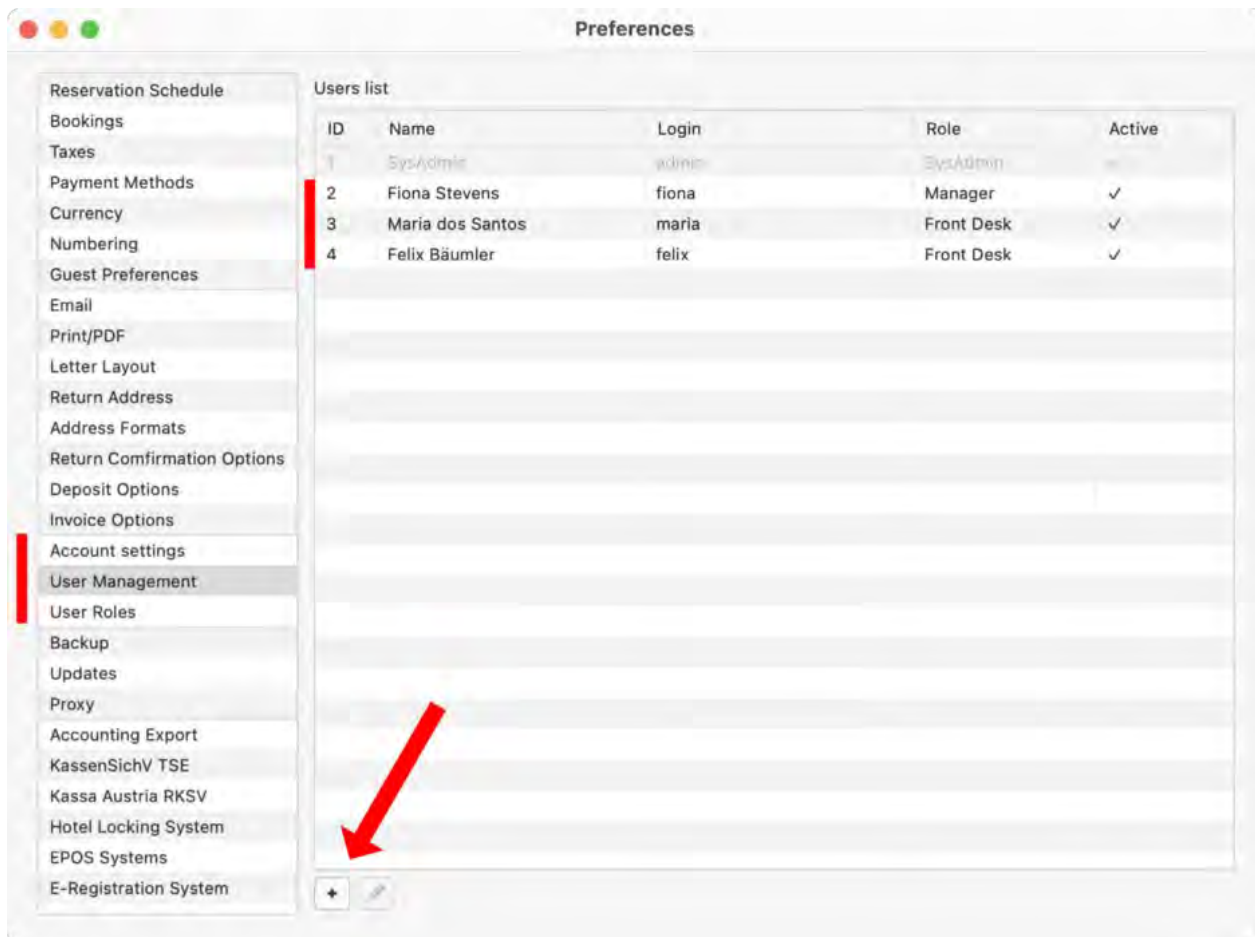
Enter the full name of the person and a login name. Now assign a user role that you want to assign to the person. There are several general options available to you at this point:

- Manager
- Reception & Reception (limited)
- Revenue Manager
- Cleaning Personnel
- Bar and restaurant
- Auditor
- Other

> In a further step, you can configure these standard roles for your employees according to your wishes; i.e. you can add or remove access rights individually.

Finally, assign a temporary password and confirm the new profile with Save. The profile now appears at the top of the list.
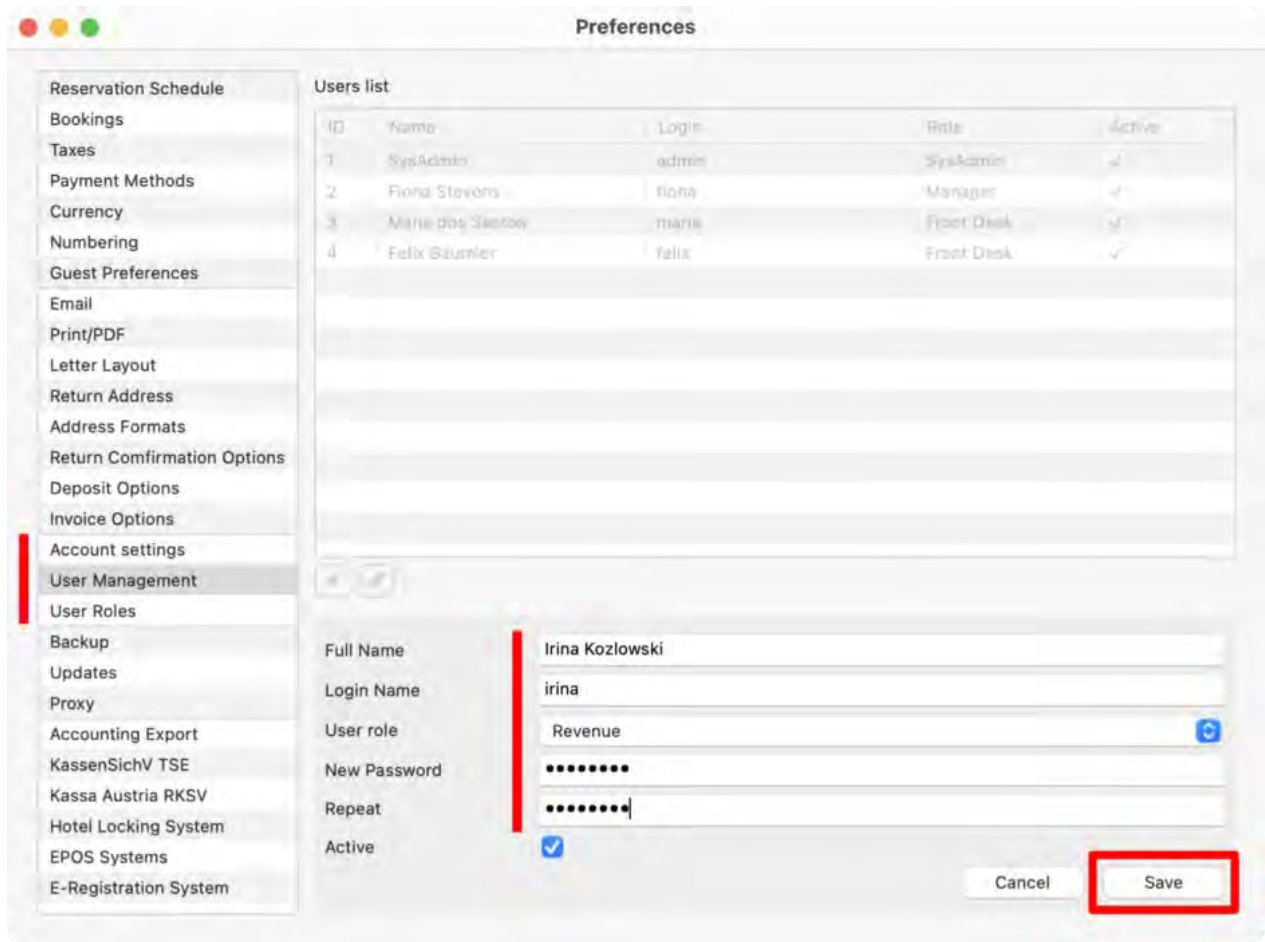
> Immediately after creating a profile, please ask your employees to log themselves into Lodgit Desk and enter a new individual password under Account Settings.

You can also edit profiles for people who are already in the user list. To do this, first double-click on the name and enter new data. For example, you could assign a different role or a new password. After editing, click *Save*.
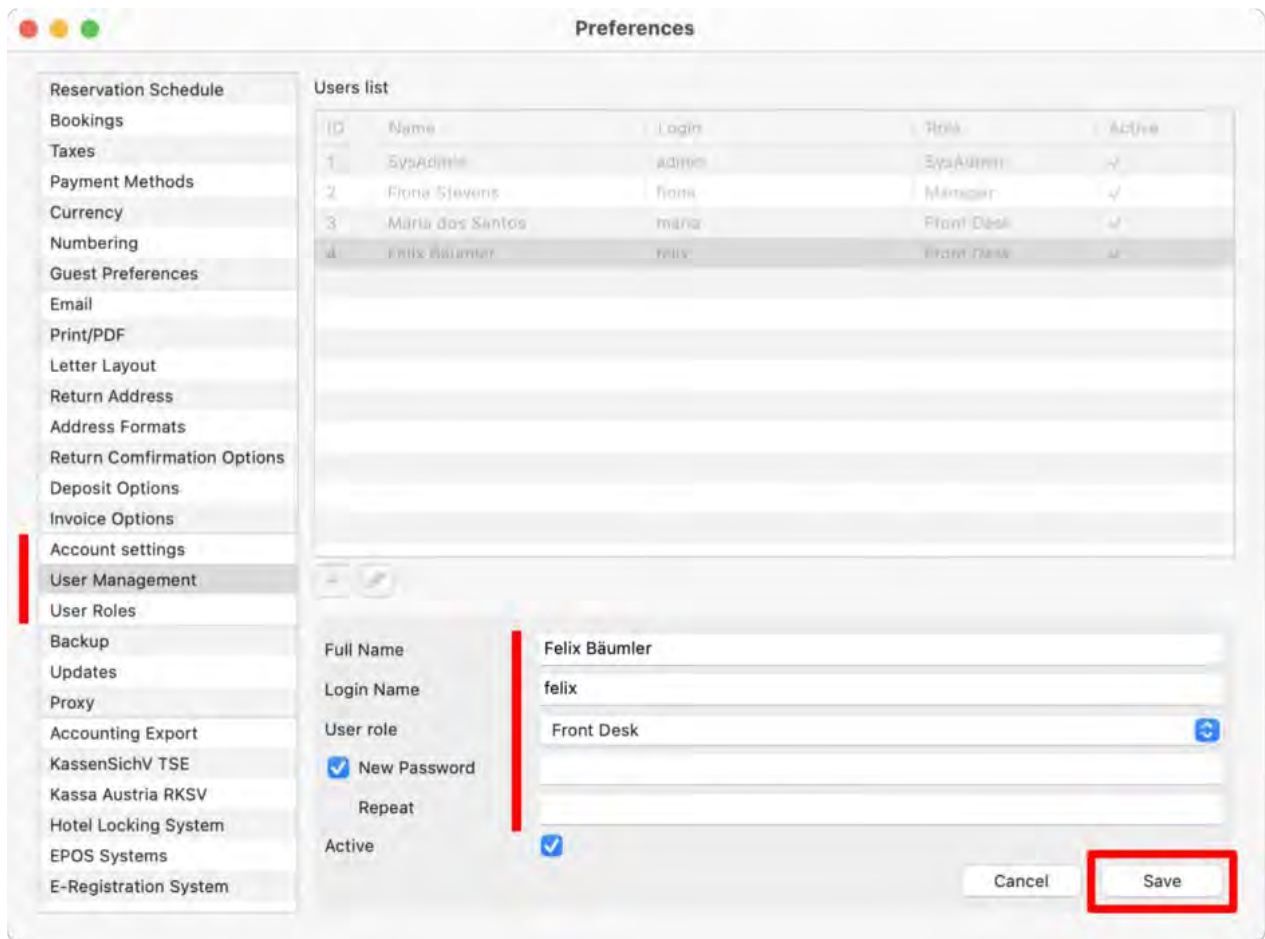
USER MANAGEMENT OVERVIEW   UP   USER ROLES AND RIGHTS

User Roles and Rights

Overview

Under User Roles, you can customize existing roles for your employees. Three areas are available to you:

1. Here you can select an existing user role or create a new one and then customize it.
2. For user management, the functionality of Lodgit Desk has been divided into four areas: settings, lists, guest functions and actions.
3. For each of these four areas, individual functions can be specifically added or removed here.
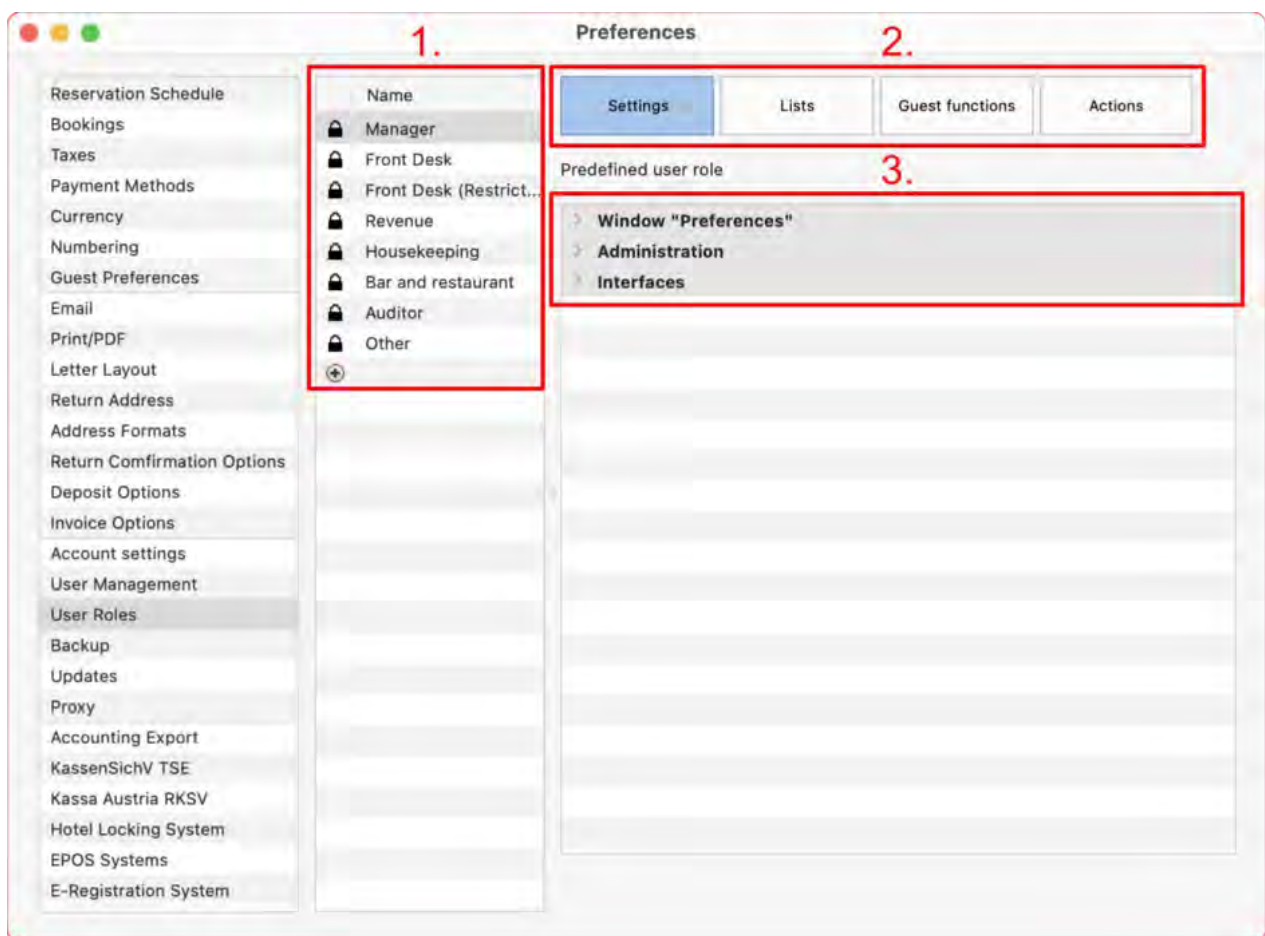
Create A New User Role

To create a new role, first click on the PLUS icon. Now you can select a predefined role (e.g. Reception), which you can customize right away.
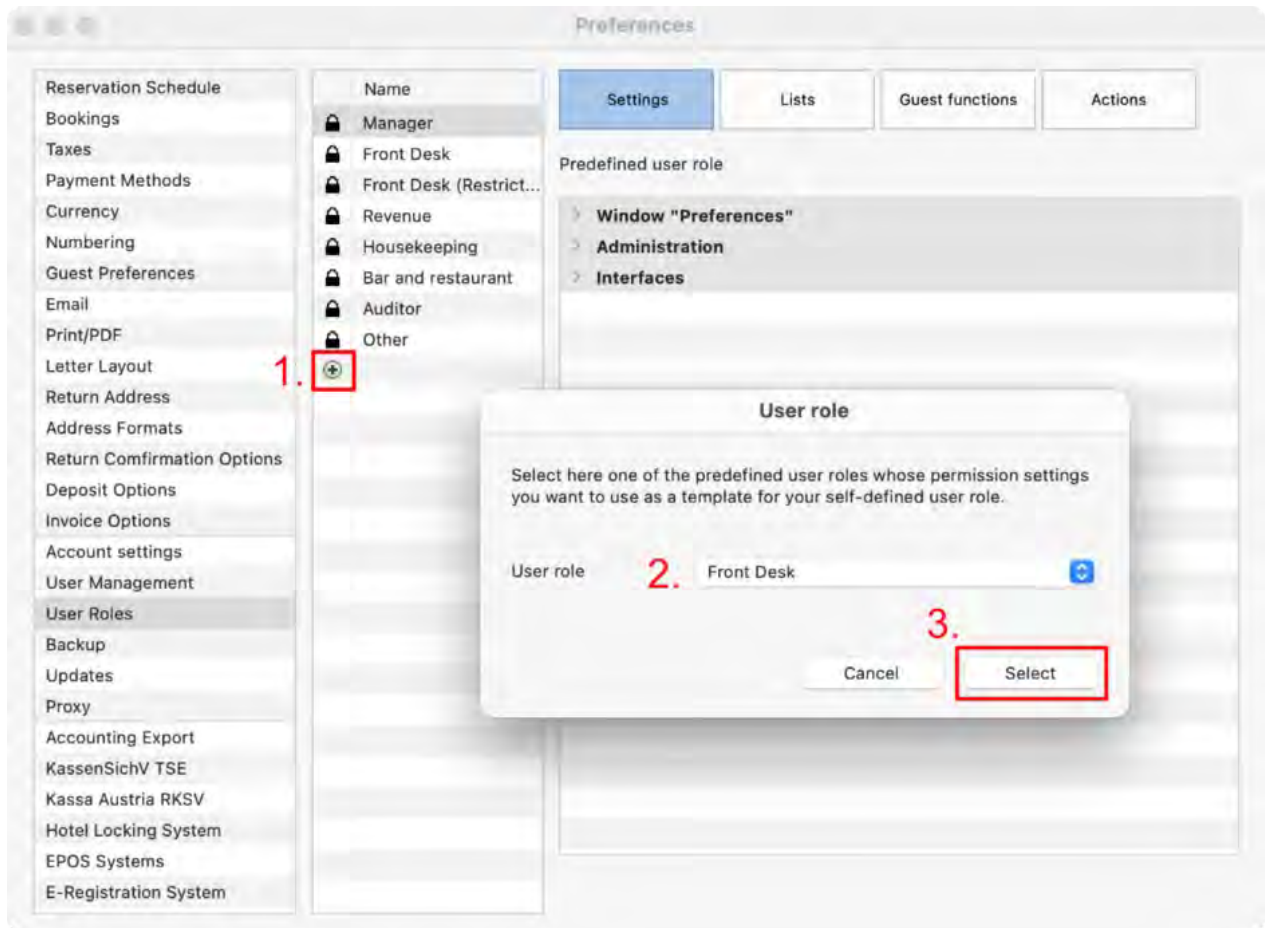
First, adjust the name of the user role: You can now rename the automatically created "Reception1" to "Reception Maria", for example.

If you now click on one of the four areas (here: guest functions), a box will appear next to each of the individual functions in the gray box.

- A blue check mark indicates that this user role has been given all access rights in this function group (here: bookings, correspondence).
- A blue minus indicates that only certain functions can be accessed in this group (here: guest management).
- If the box is empty, all access rights for this function group are currently denied (here: interfaces).
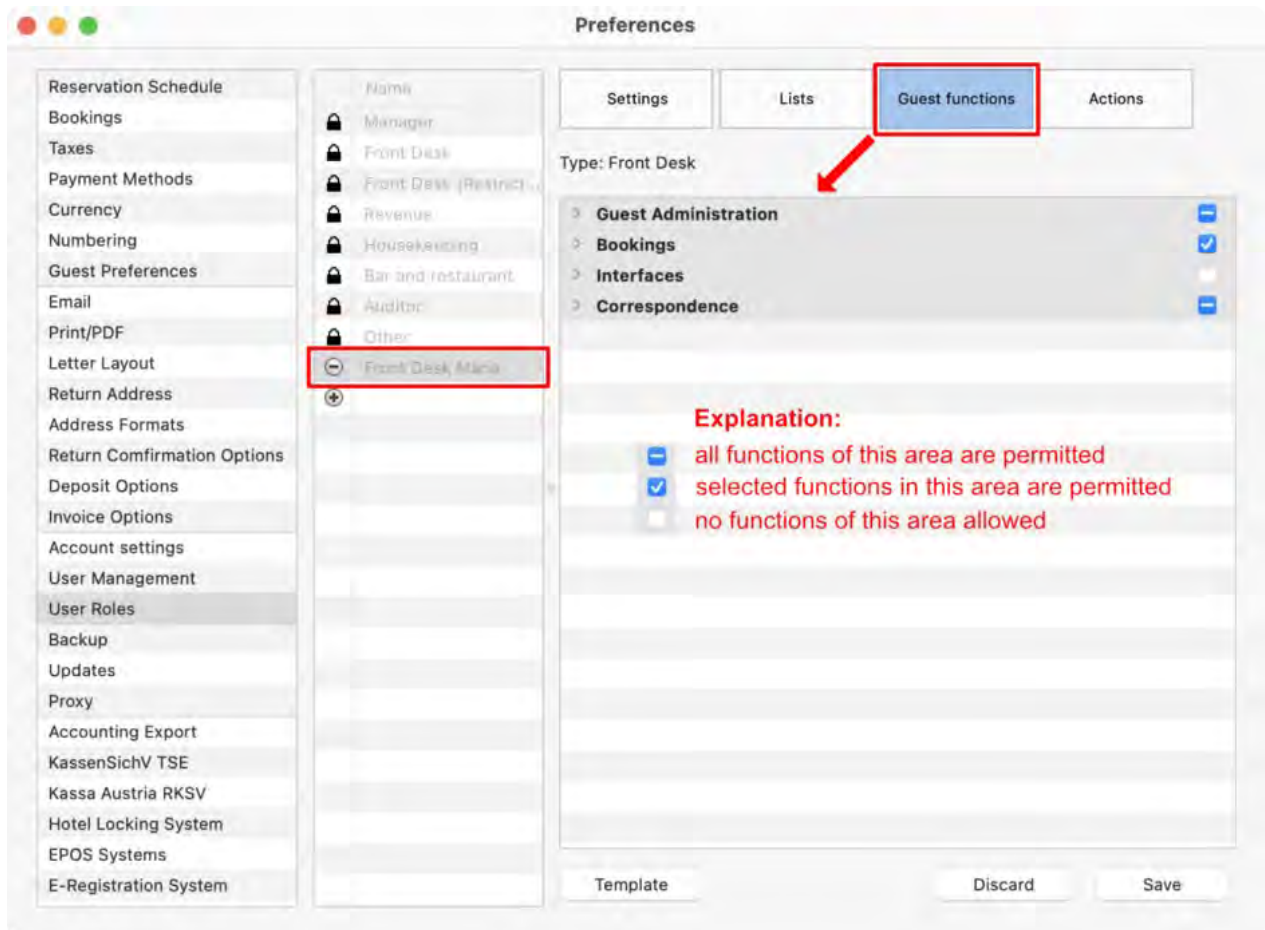
For your individual settings, first expand the function groups using the arrow next to the designation (here: Guest management). An overview of the individual functions or activities that you can assign to a user role appears. Finally, confirm your changes with *Save*.
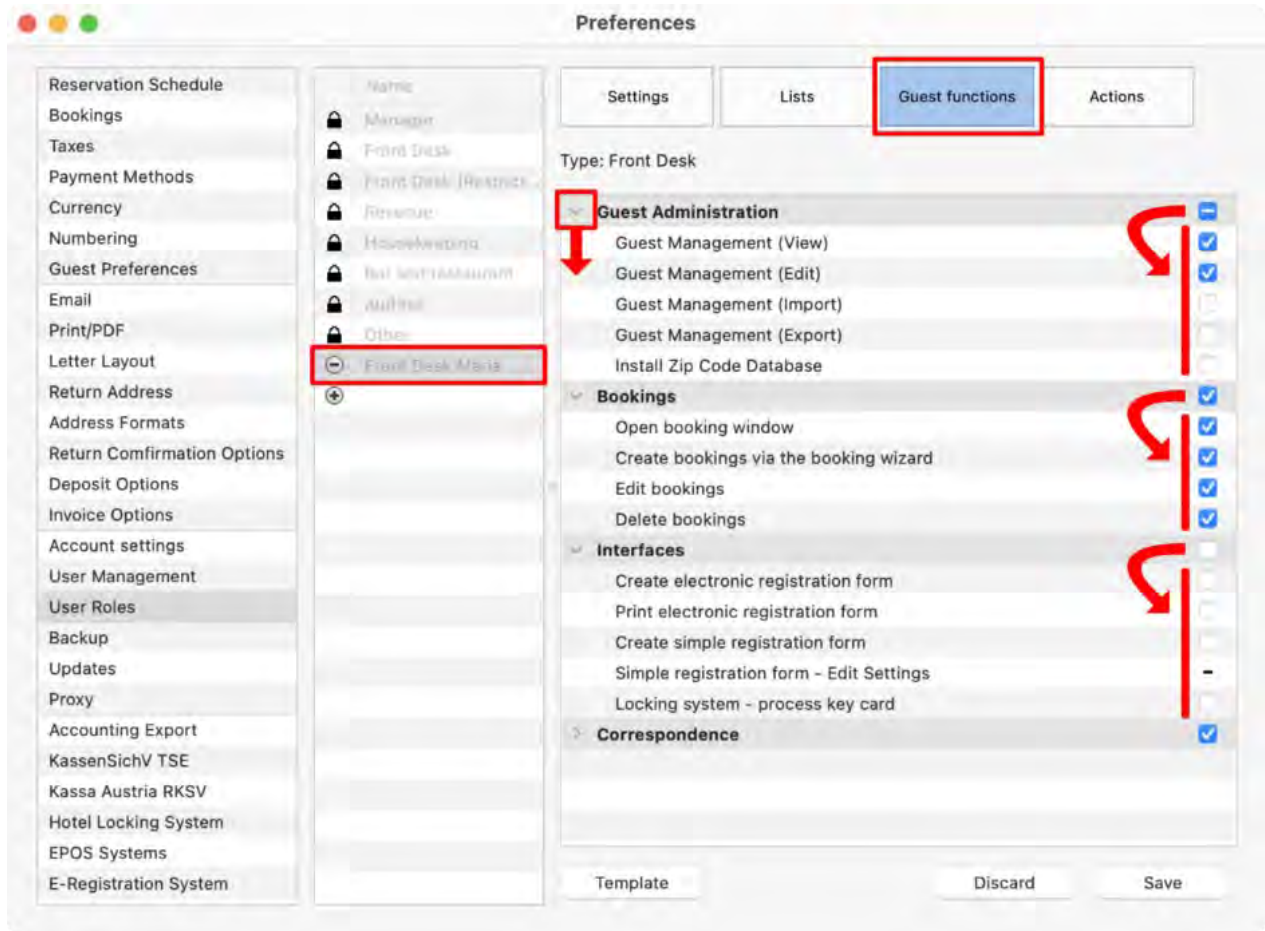
CREATE USERS AND PROFILES   UP   OVERVIEW OF PREDEFINED USER ROLES

Overview of Predefined User Roles

Below you will find an overview of all user roles that have already been defined. The individual rights are divided into general access as well as read and write access for all workflows and settings.

> You can adopt these defaults for your accommodation provider or customize all roles individually. You can find instructions on how to do this in the article User roles and rights.

Manager

Has **all** rights as well as **unrestricted** access to Lodgit Desk with the exception of user account management.

Reception

Has **limited** access to Lodgit Desk. All functions for editing bookings, guests and documents as well as access to booking-related statistics and settings are available. There is read access to the object management, price management, text management and extra item management.

Access to the following actions is available:

- Connect and disconnect from the database server
- Viewing and updating license data
- Settings window: Activate KassenSichV TSE
- Create, modify and delete bookings
- Setting the cleaning status via the occupancy schedule
- Creation and printing of electronic and simple registration forms
- Online modules: Manual synchronization
- Evaluation manager: Manual sending of data
- Cash register systems: Manual generation of the guest room file and readout of the turnover file
- Locking systems: Writing access media
- Generate offers, confirmations, invoices, receipts and guest letters
- Invoice cancellation
- Reprinting, sending as e-mail and fiscalization (TSE) of generated documents

There is read and write access to the following settings:

- Settings: Account Settings, Occupancy Plan, Bookings, Guest Features, Email Sending, Print/PDF, Letter Layout, Sender Address, Country Address Format, Reconfirmation Options
- Administration: Guest management
- Booking window: Simple registration form

There is read access to the following settings:

- Settings: Taxes, payment types, currency, number ranges, down payment options, invoice options, KassenSichV TSE, Kassa Austria RKSV.
- Management: object management, price management, extra item and package management, text management, rating manager

There is access to the following lists (including printing)

- Error log of the POS systems, event log of the online systems, TSE information window
- Administration: cash book, deletion log (bookings, correspondence, birthdays, evaluation manager)
- Lists: List of electronic registration slips, Cleaning list (+ export), Guest list, Check-in list, Check-out list, Lodging list, Extra item list, Overnight tax list, Deposit list

Reception (Limited)

Has **limited** access to Lodgit Desk.

There is access to the following actions:

- View and update license data
- Creating bookings with the help of the booking wizard
- Opening and viewing the data of the booking window
- Creation and printing of simple and electronic registration forms
- Online modules: Manual synchronisation
- Cash register systems: Manual generation of the guest room file and readout of the turnover file
- Locking systems: Writing access media
- Reprinting, sending as e-mail and fiscalization (TSE) of generated documents

There is read and write access to the following settings:

- Settings: Account settings
- Administration: Guest management

There is read access to the following settings:

- Settings: Occupancy schedule, bookings, guest functions, e-mail dispatch, print/PDF, letter layout.

There is access to the following lists (including printing)

- Error log of the POS systems, event log of the online systems, TSE information window
- Administration: Deletion log (bookings), correspondence, birthdays.
- Lists: list of electronic registration slips, cleaning list (+ export), guest list, check-in list, check-out list, extra item list

Revenue Manager

Has **limited** access to Lodgit Desk and access to settings and lists.

Has access to the following actions:

- Connect and disconnect from the database server
- View and update license data
- Opening and viewing the data of the booking window
- Settings window: Activate KassenSichV TSE
- Create and print simple registration forms
- Online modules: Manual synchronisation
- Evaluation manager: Manual sending of data
- Cash register systems: Manual generation of the guest room file and readout of the turnover file
- Reprinting, sending as e-mail and fiscalization (TSE, RKSV) of generated

documents
- Performing the dunning run
- Creating a Z receipt and an X receipt in the cash book

There is read and write access to the following settings:

- Settings: Account settings, booking plan, bookings, guest features, taxes, payment types, currency, number ranges, email sending, print/PDF, letter layout, sender address, country address format, reconfirmation options, deposit options, invoice options, accounting export.
- Management: object management, price management, extra items and package management (+ export), text management, agent commission, valuation manager, GoBD journal export, synchronization and online modules
- Booking window: Simple reporting form
- Lists: Country settings of the accommodation statistics

There is read access to the following settings:

- Settings: KassenSichV TSE, Kassa Austria RKSV
- Administration: guest administration (+ export), TSE administration (expert mode)

There is access to the following lists (view, print, export)

- Error log of the POS systems, event log of the online systems, TSE information window
- Administration: cash book, cash statements (+ print archived statements), GoBD journal export, DSFinV-K export, deletion log (postings), correspondence, change log - invoices, financial reports, list of open invoices, birthdays, valuation manager.
- Lists: accommodation statistics, list of electronic registration slips, cleaning list, guest list, check-in list, check-out list, occupancy list, lodging list, extra item list, overnight tax list, down payment list, agent statistics, accounting export

Housekeeping

Has very **limited** access to Lodgit Desk.

- Setting the cleaning status via the occupancy schedule
- Settings: Account settings
- Lists: Cleaning list (view, print, export)

Bar and Restaurant

Has very **limited** access to Lodgit Desk.

- Opening and viewing the data of the booking window
- Settings: Account settings
- Read access to the extra item and package management
- Lists: Extra item list (view, print)

Auditor

Has **read access** to Lodgit Desk.

There is access to the following actions:

- Connect and disconnect from the database server

- View license data
- Opening and viewing the data of the booking window
- Viewing and reprinting generated documents
- Printing an X-receipt via the cash book

There is read access to the following settings:

- Settings: Account settings, booking plan, bookings, guest functions, taxes, payment types, currency, number ranges, e-mail dispatch, print/PDF, letter layout, sender address, country address format, reconfirmation options, down payment options, invoice options, backup, update, proxy, accounting export, KassenSichV TSE, Kassa Austria RKSV, locking systems, cash register systems, electronic registration certificate, XML booking interface.
- Administration: Object administration, price administration, extra items and package administration (+ export), text administration, agent commission, valuation manager, GoBD journal export, synchronization and online modules, XML booking interface, object IDs, guest administration (+ export), TSE administration (expert mode)
- Lists: Country settings of the accommodation statistics

There is access to the following lists (view, print, export)

- Error log of the POS systems, event log of the online systems, TSE information window
- Administration: cash book, cash statements (+ print archived statements), GoBD journal export, DSFinV-K export, deletion log (postings), correspondence, change log - invoices, financial reports, list of open invoices, birthdays, valuation manager.
- Lists: Accommodation statistics, list of electronic registration forms, cleaning list, guest list, check-in list, check-out list, occupancy list, lodging list, extra item list, overnight tax list, down payment list, agent statistics, occupancy and key figures, accounting export

The following functions are **disabled**

- Performing the accounting export: update the export status to "exported".
- Accounting export (Datev): Editing the settings ("Consultant number", "Client number" and "G/L account number length")
- CSV export: add and manage the templates
- Automatic data synchronization with the rating portals
- Automatic data synchronization with the Lodgit server (synchronization)
- Automatic data synchronization via the XML booking interface
- Creation of tickets via the OTRS ticket system

Other

Has **very limited** access to Lodgit Desk.

- Settings: Account settings

System Administrator (SysAdmin)

Also, the predefined user "SysAdmin" is always available to you. If you are logged in as a system administrator, you have **all rights** as well as **unrestricted access** to Lodgit Desk. This includes the administration of user accounts. The user "SysAdmin" can neither be deleted nor changed.

The predefined credentials for the "SysAdmin" user are:

- username: admin

- password: admin

For security reasons, please change these credentials immediately after logging in for the first time via the settings > account settings.

USER ROLES AND RIGHTS   UP   MANAGE CORRESPONDENCE

Correspondence with guests

Below you will find information for creating offers, confirmations and invoices as well as other correspondence with the guest (by letter or e-mail).

Create offers
Manage offers
Manage offer templates
Create confirmations
Manage confirmations
Manage confirmation templates
Create invoice
Cancel invoice
Manage invoices
Corrective invoice archives
Correspondence
Manage correspondence templates

Create offer

After a booking has received the status **Tentative** or **Offer**, you can create an offer for it.

Go to "Create offer" window

There are three different ways to create an offer:

... from booking window

Open the booking window for the booking in question. Press the button **Create offer**.

... from reservation schedule

Select the booking in question in the reservation schedule and call up the context menu (right-click). Select the context menu item **Create Offer**.

... via menu bar

Select the booking in question in the reservation schedule and then go to **Bookings > Create Offer**.

Offer window and settings
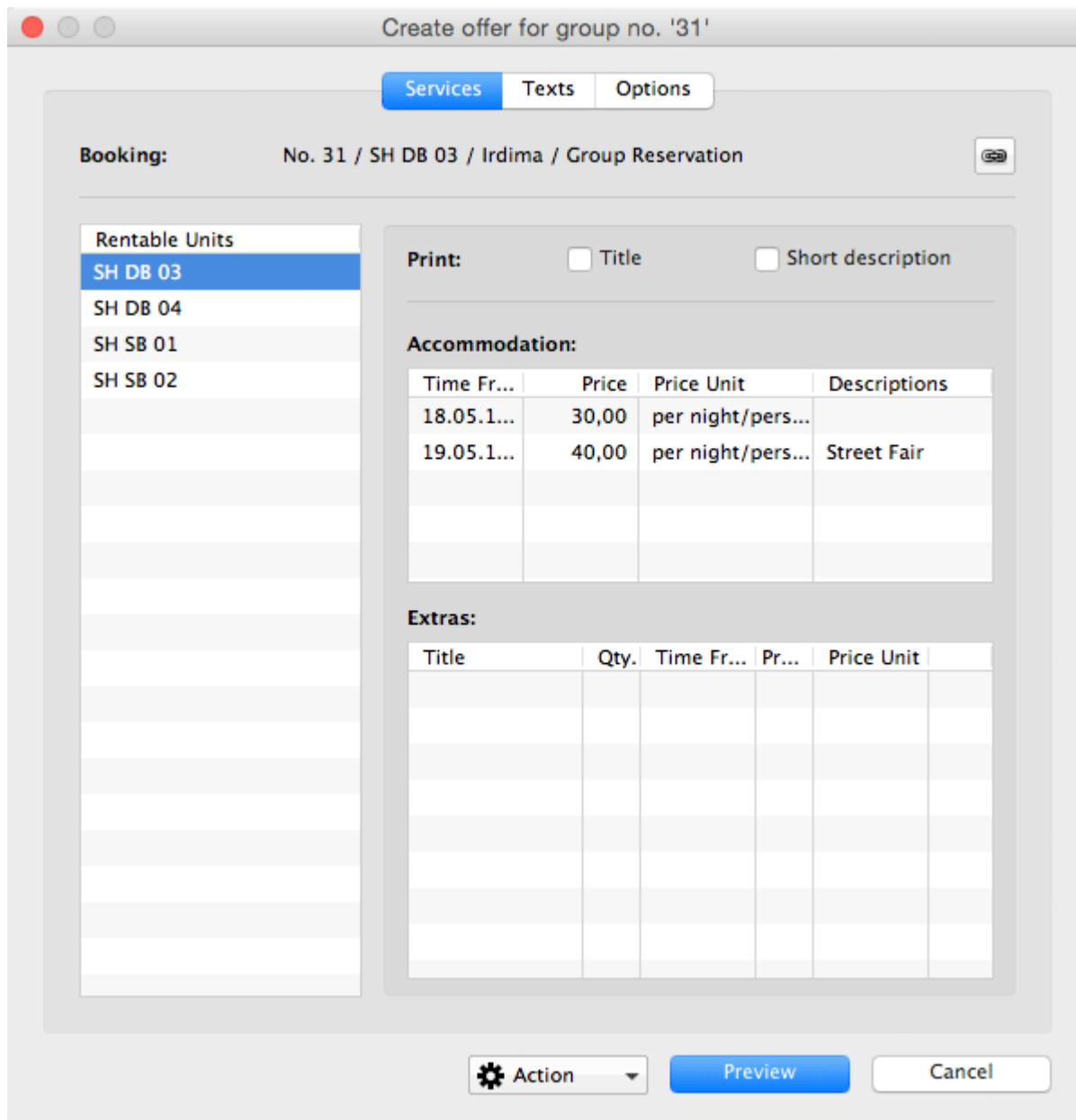
In the area **Services** you can review all the information about accommodation and extra items of a booking. In the case of group bookings, you'll also see a list of all bookings belonging to the group.

If you like, you can decide for each unit whether the title and/or short description should be displayed on the offer.

In the area **Texts** you can edit the texts of the offer as well as set some print options:

In the drop down menu in the upper left corner you can select a language for this offer and the drop down menu in the upper right corner you can select one of the templates you created earlier.

You can also edit all texts individually for this offer in the text fields.

In the area **Options** you can set a validity date for the offer. And you have the option to print out a **return confirmation** right away (that's a form that your guest can fill out, sign and send back to confirm the booking).

The menu **Sort by** lets you decide how to sort multiple units of a group booking on the offer.

The menu **Print options** allows for some options regarding what and how items will be printed. Here you can for example choose if identical accommodation items such as two double rooms should be bundled to a single item on the invoice as shown in the example below:
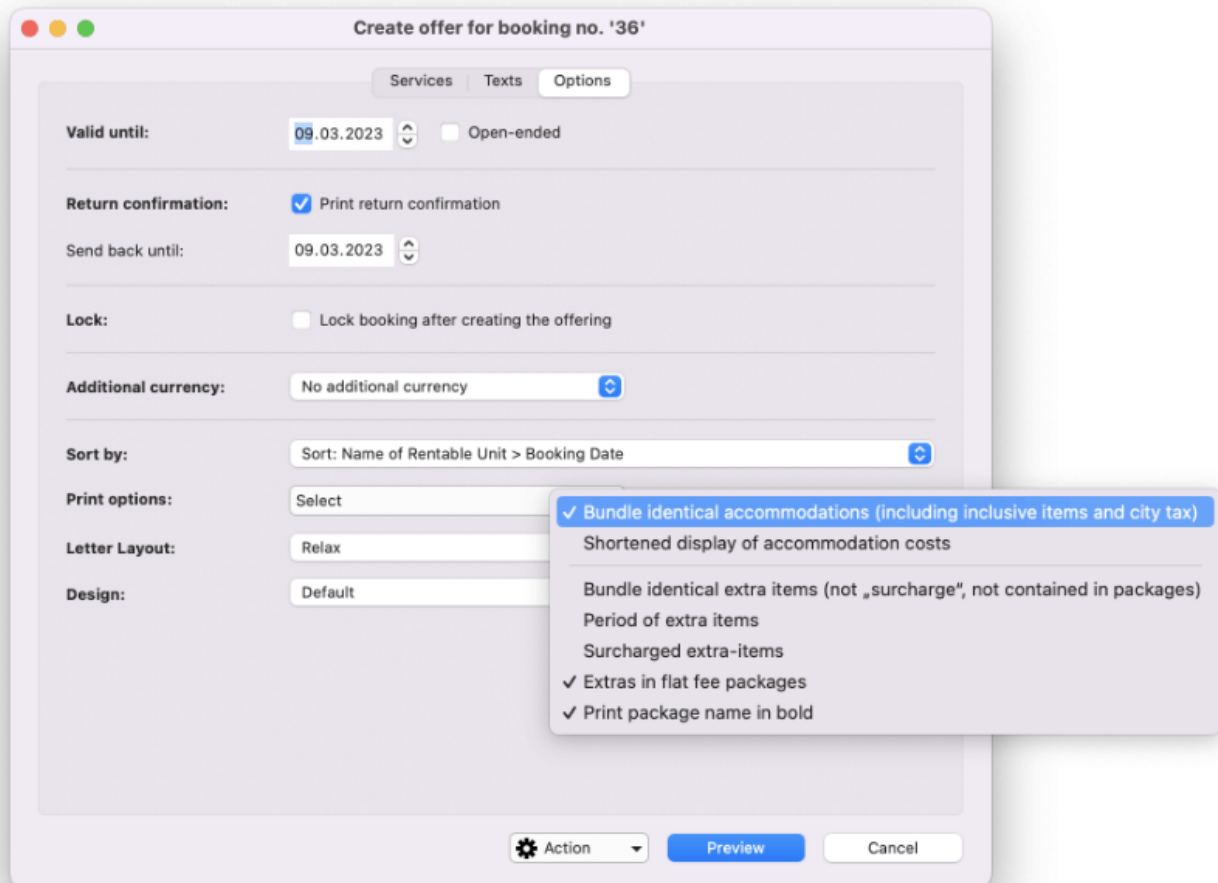
And you can select the **letter layout** as well as one of the **designs**.

If you like, you can make sure that the booking is **locked** after the offer is created.

Print, save and send offers

You can check everything using the **Preview**. By pressing the button **Print**, the created offer (with or without return confirmation) will be printed. The booking status is automatically set to **Offer**.

Within the menu in the lower left area you can also **Save** the offer without printing it, save it as a **PDF** file on your computer, send the offer as an **Email** or send it as an **Email with PDF** attachment.

> *Important:*
> *If you want to send offers **via email** (either directly or as a PDF-attachment), you must **first enter an email address** in the guest's contact information in the Guest Management.*

The final offer won't be created in the system until you've printed, saved or emailed it. If you would rather not create the offer, simply close the offer window.

Send offer via email

You can send the offer via email by pressing the button **Email**. A preview window will open that allows you to alter the recipient's email address and/or add more recipients (CC).

Once you're finished press the button "Send to email program" or "Send email".

Send offer as email with a PDF attachment

If you want to send the offer as an **Email with PDF attachment**, the following window will open:
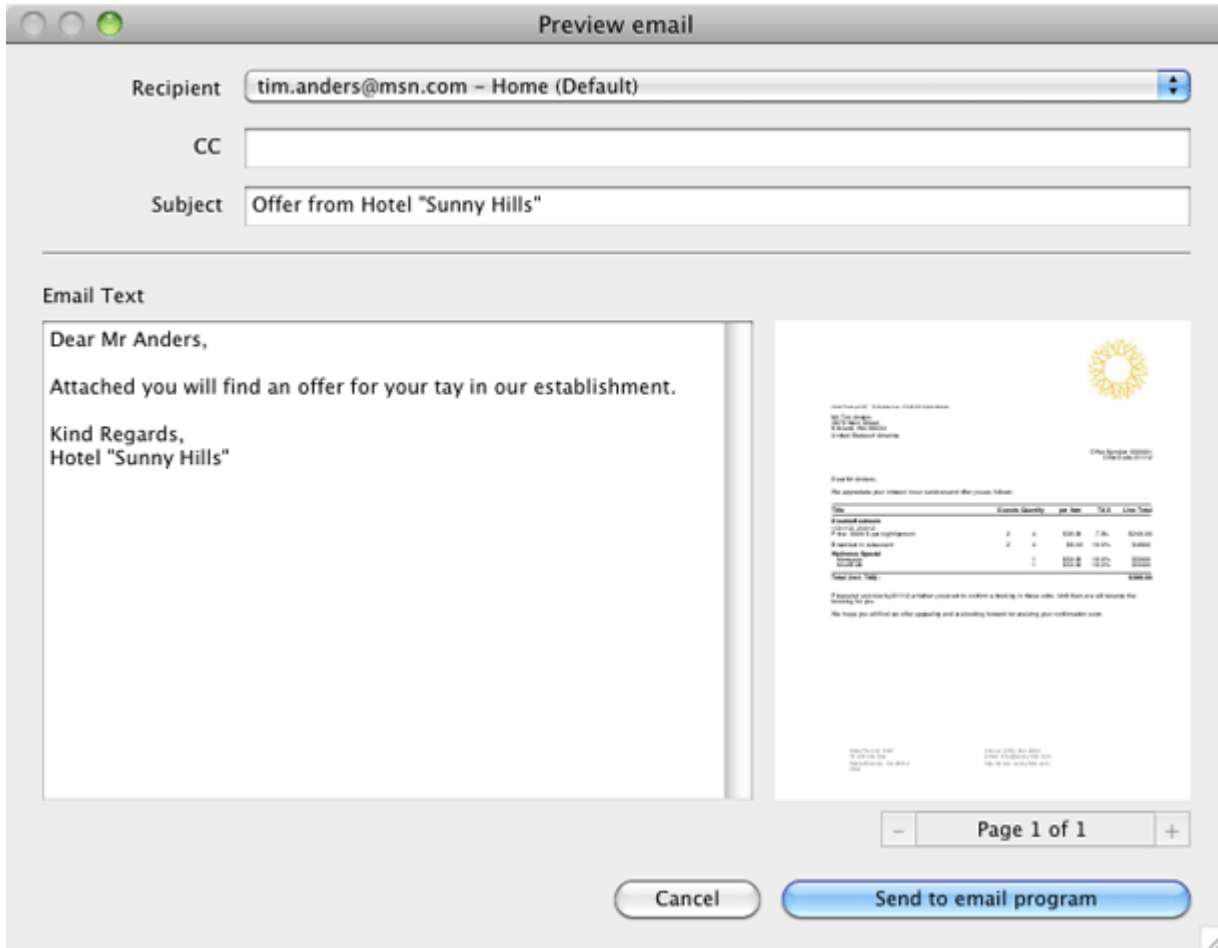
Now you can edit or add recipients, edit the email content and preview the PDF file. Once you're finished, press "Send to email program" or "Send email".

View (and print/send) offers again

Go to **Administration > Archives > Offers** to view and print all created offers (for more info see Manage Offers) again after you've created them.

Furthermore, you can access the created offer for a booking in its booking window under Correspondence. And finally, another way to access a created offer is to search the history of a guest and view/print all offers sent to them.

MANAGE CORRESPONDENCE   UP   MANAGE OFFERS

Manage offers

If you want Lodgit Desk to show all created offers so far, go to **Administration > Archives > Offers** or press the button **Archives** in the main window.

This will open the **offer archives** and list all previously printed offers.

Symbol	Status	Note
✅	Confirmed	Whenever a booking with a saved offer receives the status **Confirmed,** the offer status will also automatically be set to **Confirmed**.
〰️	Open	As long as a booking with a saved offer does not have the status **Confirmed,** the offer status will be **Open**.
❌	Invalid	After a booking with a saved offer is deleted, the offer status will be set automatically to **Invalid**.

You have the option to filter the list, showing only offers of a **certain time frame** (for this you can sort the offers by their date, their validity or the date for their return confirmation) or a **certain property**.

You can also filter the search and only show offers with a certain **status**. Simply select the status you want to see in the pop up menu **Status**.

> *Note:*
> *You can sort the list by clicking on the column headers. Click once on the header to*

> *sort the list by this column descending. Click once more to sort the by this column ascending.*

Double-click on an offer to view it again.

Use the Actions menu ⚙▾ to switch to the booking window of the booking the offer belongs to. Choose **Open Booking** to switch to the booking window. You can also print the offer again.

You can also **print the entire list** by pressing the "Print" button. A print preview can be created by pressing the "Preview" button. You can also **export the list as CSV or Excel files** by pressing the "Export" button.

Print / save offers again

Right-click on an offer in the archive to print it, save it as a PDF or send it as an email with a PDF attachment. You can select a different letter layout than the one you used originally and you can define whether to print a return confirmation (or print JUST the return confirmation).

CREATE OFFERS   UP   MANAGE OFFER TEMPLATES

Offer Templates

You can write texts for offer templates that you can then use to promote specials, arrangements or packages. You'll save opening and finishing paragraphs for offer texts in a certain template so you can use it again at a later time, without having to write the texts again. Once a template is created, you'll be able to select it from the drop down menu at the top right corner of the offer window.

You can create and manage your offer templates in the **offer window**:
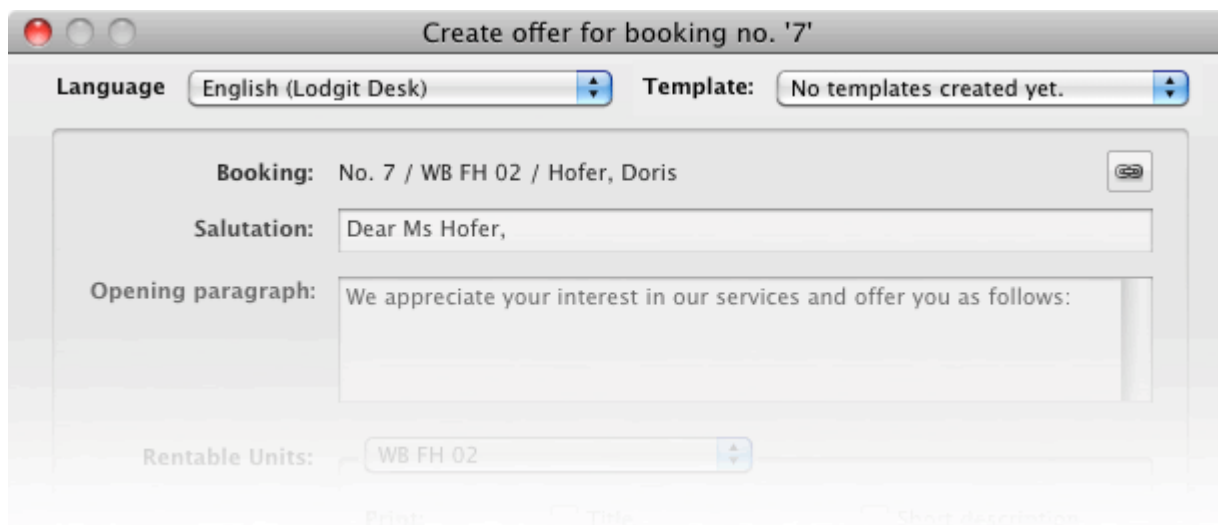
Create offer templates

When creating an offer for a booking in the **offer window**, you have the option to save that offer as a template. Simply select **Save this offer as a template...** from the drop down menu in the upper right corner.

Once selected, you'll be asked to pick a name for your template. This name can be put on the offer when it's printed out. Once the template saved, it will appear in the list under **Template**.

Select an offer template

While creating an offer for a booking in the **offer window**, you can select a template you want to use for this offer. Simply select a template from the drop down menu **Template** in the upper right corner. This will load the content of the template into your current offer window.

Manage offer templates

You can rename or delete the templates as well. Simply select **Manage templates...** from the drop down menu in the upper right corner. This will open the **Manage Templates** window:
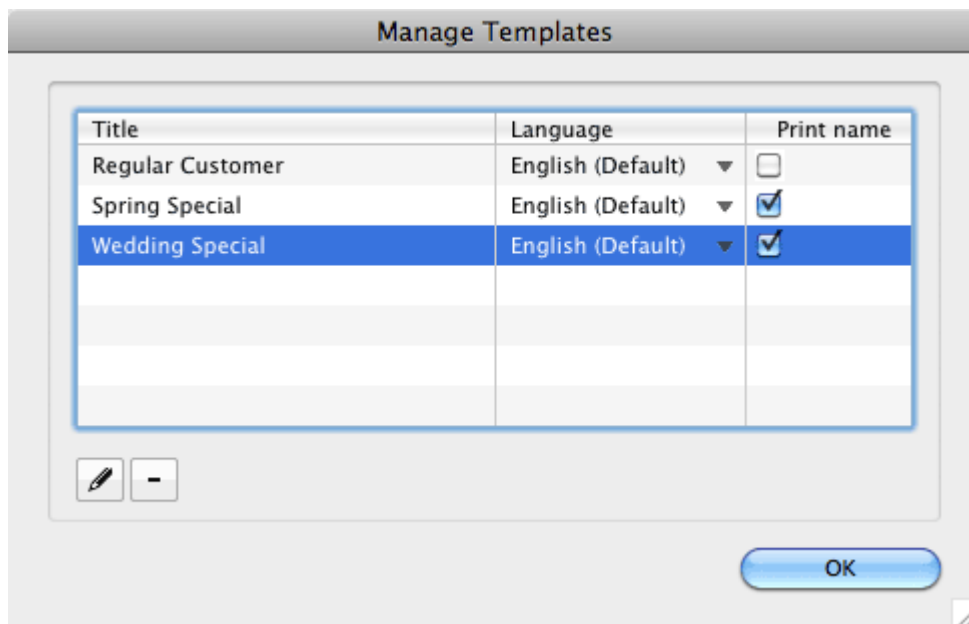
To rename a template double-click on its name, or select it and press the "Edit" button.

To delete a template, select it and press the "Delete" button.

> *Note:*
> *If you want the name of the template to be printed on the offer, check the box that says "Print Name".*

MANAGE OFFERS   UP   CREATE CONFIRMATIONS

Create confirmations

After a booking has received the status **Offer**, **Confirmed** or **Online Booking**, you can create a confirmation for it.

Go to "Create confirmation" window

There are three ways to create a confirmation:

... from the booking window

Open the booking window of the booking that you want to create a confirmation for. Within the booking window, press the button **Create Confirmation**.

... from the reservation schedule

Select the booking that you want to create a confirmation for in the reservation schedule and call up the context menu (right-click). Within the context menu, select the option **Create Confirmation**.

... via the menu bar

Select the booking that you want to create a confirmation for in the reservation schedule and then go to **Bookings > Create Confirmation**.

Confirmation window and settings
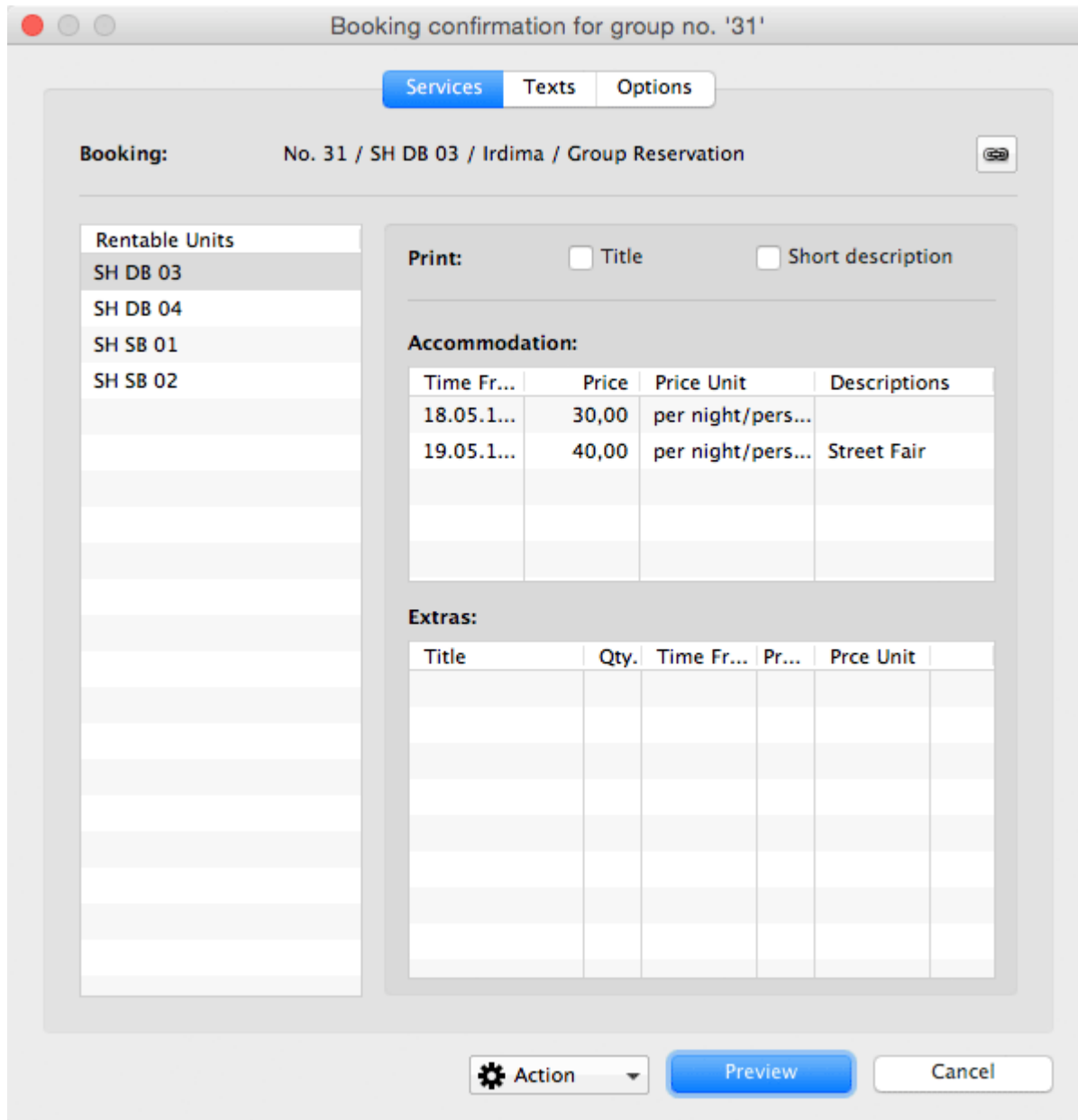
Booking confirmation for group no. '31'

Services | Texts | Options

Booking: No. 31 / SH DB 03 / Irdima / Group Reservation

Rentable Units
SH DB 03
SH DB 04
SH SB 01
SH SB 02

Print: ☐ Title   ☐ Short description

Accommodation:

Time Fr...	Price	Price Unit	Descriptions
18.05.1...	30,00	per night/pers...	
19.05.1...	40,00	per night/pers...	Street Fair

Extras:

Title	Qty.	Time Fr...	Pr...	Prce Unit	

⚙ Action ▾   Preview   Cancel

In the area **Services** you can review all the information about accommodation and extra items of a booking. In the case of group bookings, you'll also see a list of all bookings belonging to the group.

You can decide if you want to show each unit's title and/or short description on the confirmation.

In the area **Texts** you can edit the texts of the offer as well as set some print options:

In the drop down menu in the upper left corner you can select a language for this confirmation and the drop down menu in the upper right corner you can select one of the templates you created earlier.

You can also edit all texts individually for this confirmation in the text fields.

In the **Options** you have the option to print out a **return confirmation** right away (that's a form that your guest can fill out, sign and send back to confirm the booking).

The menu **Sort by** lets you decide how to sort multiple units of a group booking on the confirmation.

The menu **Print options** also allows for some options regarding what is printed and how.

Here you can for example choose if identical accommodation items such as two double rooms should be bundled to a single item on the invoice as shown in the example below:
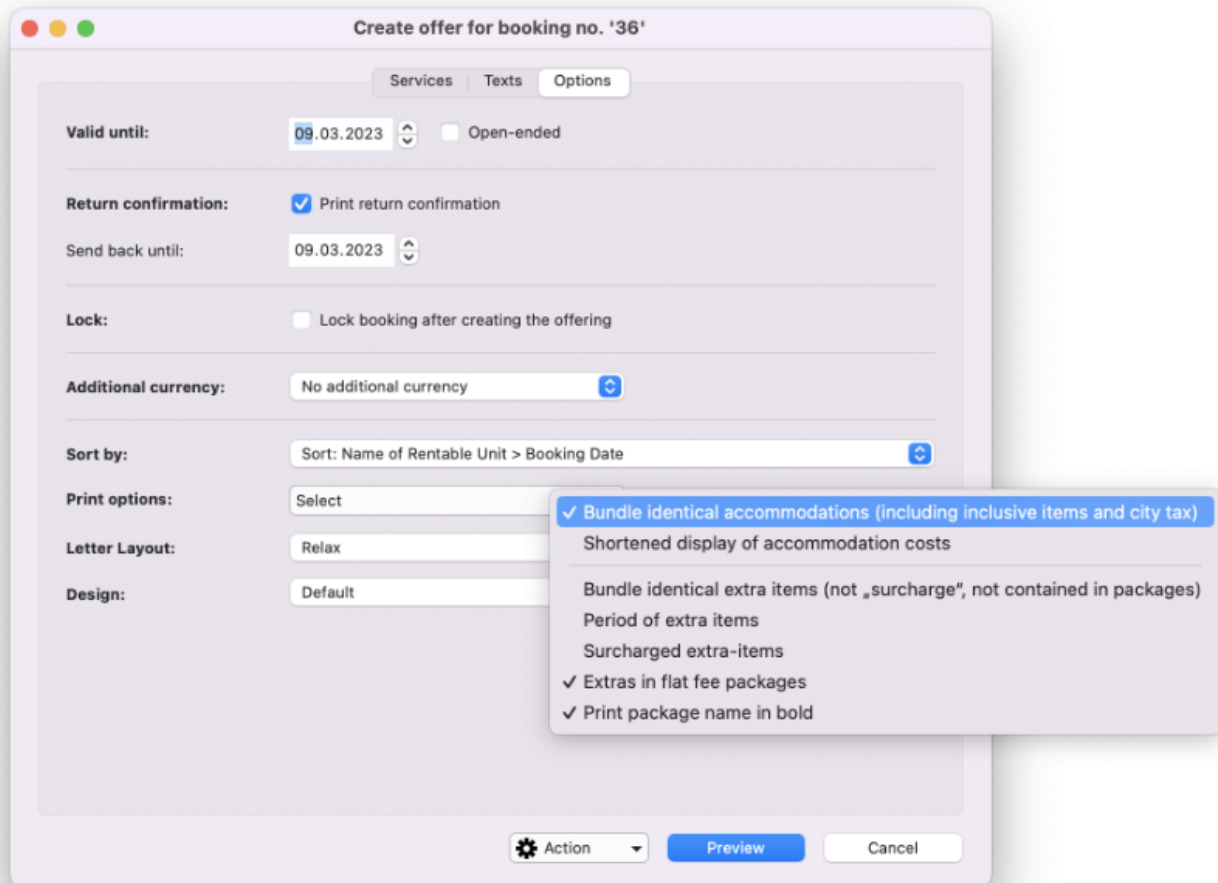
And you can select the **letter layout** as well as one of the **design**s.

If you want to make sure the booking can't be moved, you can have it **locked** after the confirmation was created.

Print, save and send confirmations

By pressing the button **Preview** you can preview and check your confirmation before you print it.
You can print the confirmation by pressing the button **Print**.

Within the menu in the lower left area you can also **Save** the confirmation without printing it, save it as a **PDF** file on your computer, send the confirmation as an **Email** or send it as an **Email with PDF** attachment.

> *Important:*
> *If you want to send confirmations **via email** (either directly or as a PDF-attachment), you must **first enter an email address** in the guest's contact information in the Guest Management.*

The final confirmation won't be created in the system until you've printed, saved or emailed it. If you would rather not create the confirmation, simply close the confirmation window.

Send confirmation as an email

If you want to send the confirmation via email, you can press the **Email** button. This will open a preview window that allows you to check and alter the email and its recipient. You can also add more recipients in the field that says CC.
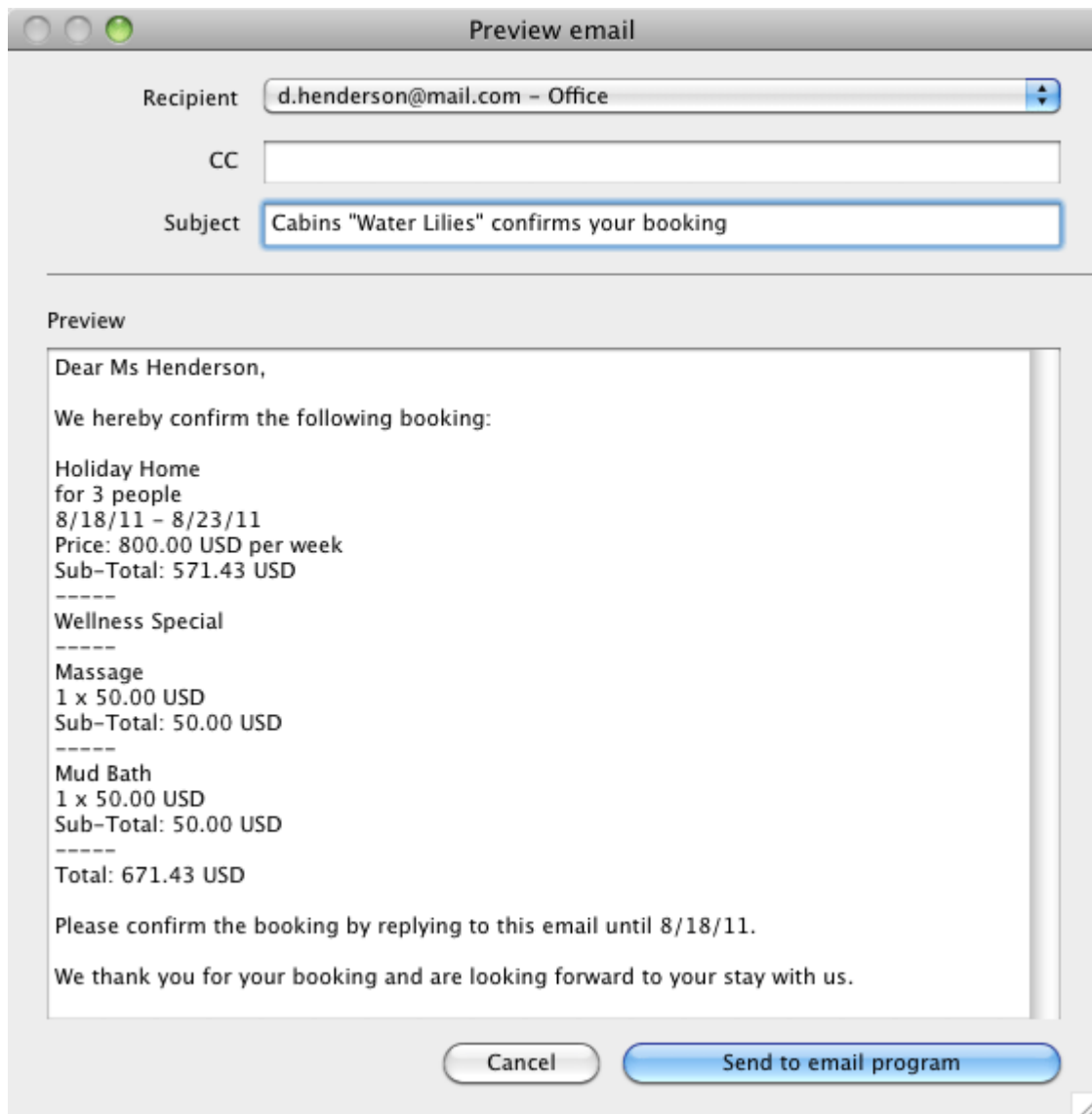
When you're done, press "Send to email program" or "Send email".

Send confirmation as an email with PDF attachment

If you want to send the confirmation as an **Email with PDF attachment**, the following window will open:
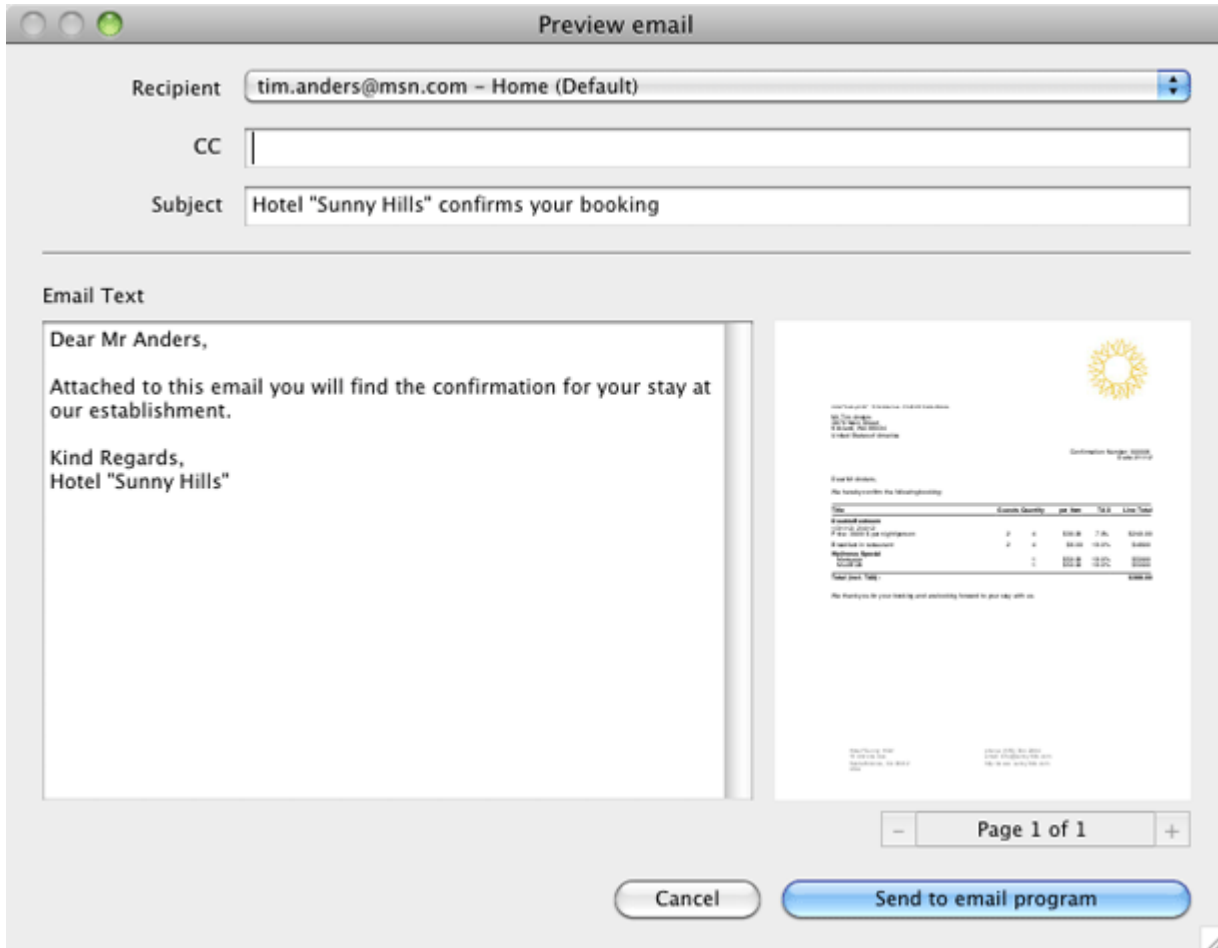
Now you can edit or add recipients, edit the email content and preview the PDF file. Once you're finished, press "Send to email program" or "Send email.

View (and print/send) confirmations again

You can also view and print any confirmation you have previously saved by going to **Administration > Archives > Confirmations**. More information on that can be found under Managing confirmations.

You can also find all confirmations linked to a booking in its booking window under Correspondence.

Furthermore, you can find/view/print all confirmations linked to a guest in the history of the guest under Guest Management.

MANAGE OFFER TEMPLATES   UP   MANAGE CONFIRMATIONS

Manage confirmations

To view all confirmations you have created, simply go to **Administration > Archives > Confirmations**. You can also press the button **Archives** in the main window.

Confirmations will show you all printed/sent confirmations. You can filter the list by **a time frame** (for this you can sort the confirmations by their date, their validity or the date for their return confirmation), by **certain objects** or by **selected status**.

Symbol Status Bemerkung

Symbol	Status	Bemerkung
✅	Valid	Whenever a confirmation is created, it automatically receives the status **Valid**.
❌	Invalid	Confirmations that have expired or become void receive the status **Invalid**.

> *Note:*
> *You can sort the list by its columns by clicking on the column header. Click once and the entries of the list will be sorted descending. Click again and the list will be sorted ascending.*

Double-click on the confirmation to view it again.

Using the Actions menu ⚙▾ of the list, you can switch to the booking window of the

booking linked to that confirmation. You can also print the confirmation again.

You can also **print the entire list**, by pressing the button "Print". A print preview can be done by pressing on the button "Preview". You can also **export the list as CSV or Excel files** by pressing the "Export" button.

Print / save confirmations again

Right-click on a confirmation in the archive to print it, save it as a PDF or send it as an email with a PDF attachment. You can select a different letter layout than the one you used originally and you can define whether to print a return confirmation (or print JUST the return confirmation).

CREATE CONFIRMATIONS   UP   MANAGE CONFIRMATION TEMPLATES

Confirmation templates

You can write texts for confirmation templates that you can then use for specials, arrangements or packages. You'll save opening and finishing paragraphs for confirmation texts in a certain template so you can use it again at a later time, without having to write the texts again. Once a template is created, you'll be able to select it from the drop down menu at the top right corner of the confirmation window.

You can create and manage your confirmation templates in the **confirmation window**:
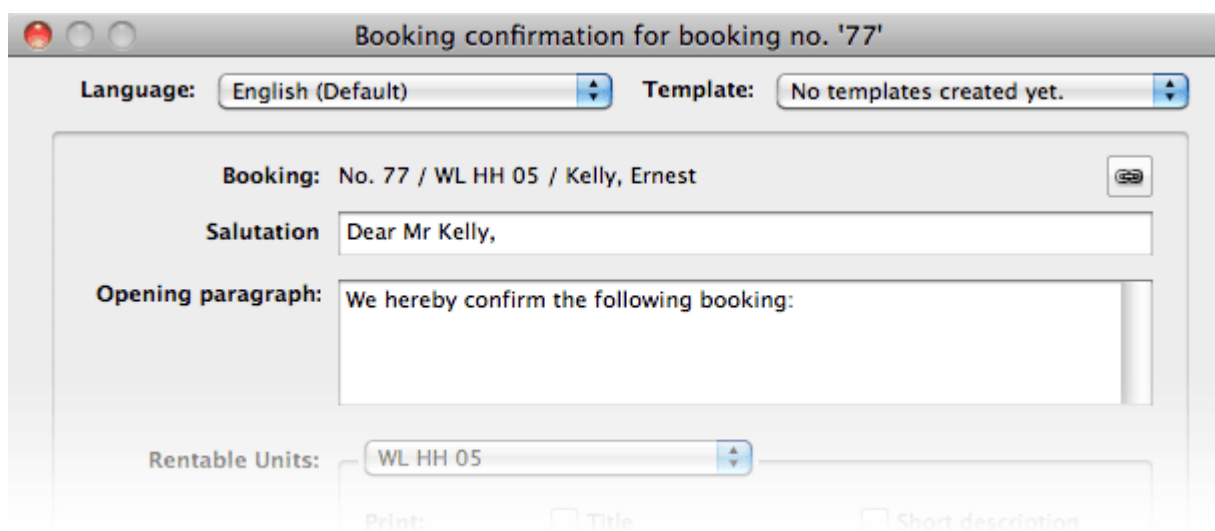
Create confirmation templates

When creating a confirmation for a booking in the **confirmation window**, you have the option to save that confirmation as a template. Simply select **Save this confirmation as a template...** from the drop down menu in the upper right corner.

Once selected, you'll be asked to pick a name for your template. This name can be put on the confirmation when it's printed out. Once the template saved, it will appear in the list under **Template**.

Select a confirmation template

While creating a confirmation for a booking in the **confirmation window**, you can select a template you want to use for this confirmation. Simply select a template from the drop down menu **Template** in the upper right corner. This will load the content of the template into your current confirmation window.

Manage confirmation templates

You can rename or delete the templates as well. Simply select **Manage templates...** from the drop down menu in the upper right corner. This will open the **Manage Templates** window:
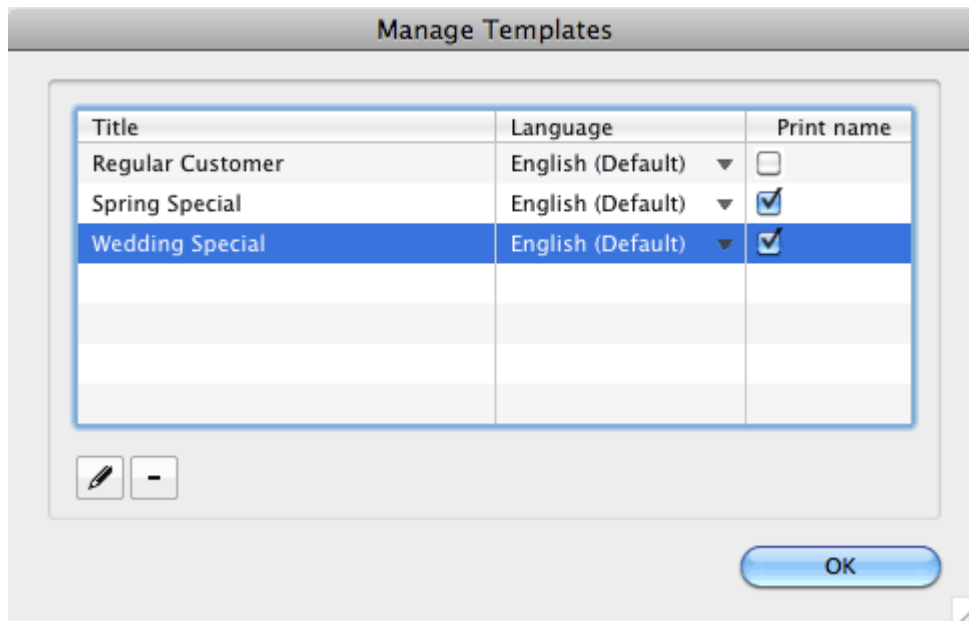
To rename a template, double-click on its name or select it and press the "Edit" button.

To delete a template, select it and press the "Delete" button.

> *Note:*
> *If you want the name of the template to be printed on the confirmation, check the box that says "Print Name".*

MANAGE CONFIRMATIONS   UP   CREATE INVOICE

Create invoice

After the status of a booking has been changed to **Booked, Checked In** or **Checked Out**, you can create an invoice for it.

Go to "Create invoice" window

There are three different ways to create an invoice:

... from booking window

Open the booking window for the booking in question. Press the button **Create invoice**.

... from reservation schedule

Select the booking in question in the reservation schedule and call up the context menu (right-click). Select the context menu item **Create invoice**.

... via menu bar

Select the booking in question in the reservation schedule and then go to **Bookings > Create invoice**.

Invoice window and settings

This will open the invoice window, which lets you create invoices for outstanding invoice items. This invoice can then be printed.

1. Select the invoice recipient. You can select one out of all the guests that have been added to the booking (that are listed under Guests / Registration Form). If need be, you can add more guests.

2. To bill outstanding items, select them in the left list. You can select one or more items at the same time.

3. The items will be moved from the left list to the right list (the items to be billed in this invoice), by pressing the arrow to the right button. If there are any deposits listed in this booking, it has to be listed in the final invoice. To delete items from the right list (e.g. because you want to bill them in a different invoice), select them in the right list and then press the arrow to the left button. This will move the items back into the left list.

Important: If a split invoice for a deposit has not been created yet it cannot be put onto the final invoice.

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4. Select the **payment method**. The **term of payment**, that you have defined for the payment method in the Preferences, will be suggested automatically. You can edit the term of payment. If you do, it only applies to this invoice. The term of payment you have defined in the **Preferences** will not be affected.

5. You can also **set the invoice to paid** immediately. If you have a payment method with the payment term "0", the invoice will be set to paid on its own. You can change the paid on date freely for every payment method except for cash.

In the tab **Texts** you can find all texts for this invoice.

Here you can change the correspondence language or the texts individually.

> ***Tip:***
> *You can generally change the texts under Administration > Texts to suit your needs.*

In the tab **Options** you can find some more settings for the display of the invoice:
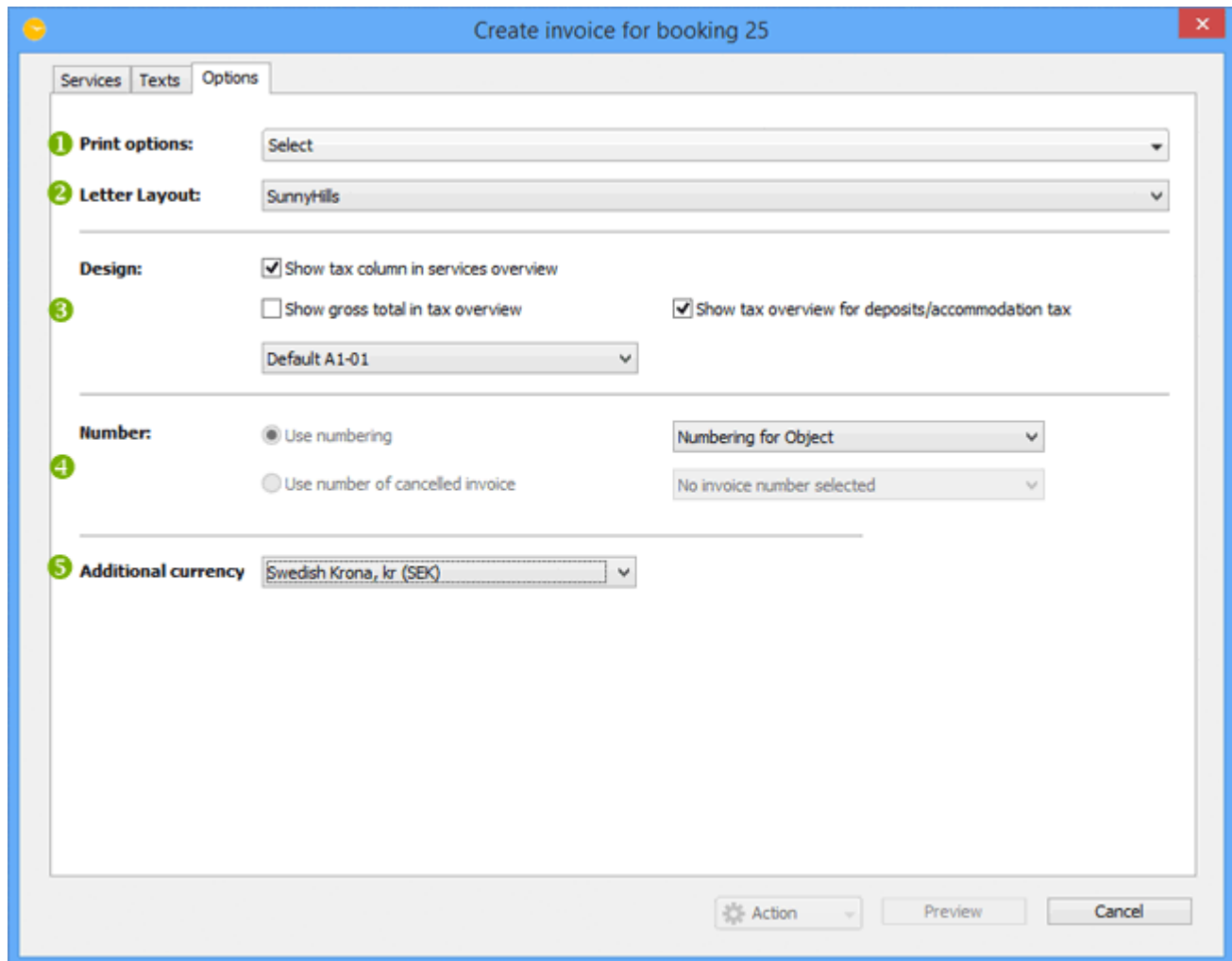
1. Using the Print options dropdown menu, you can make changes to which information is to be printed on the invoice and how items should be grouped together if possible.
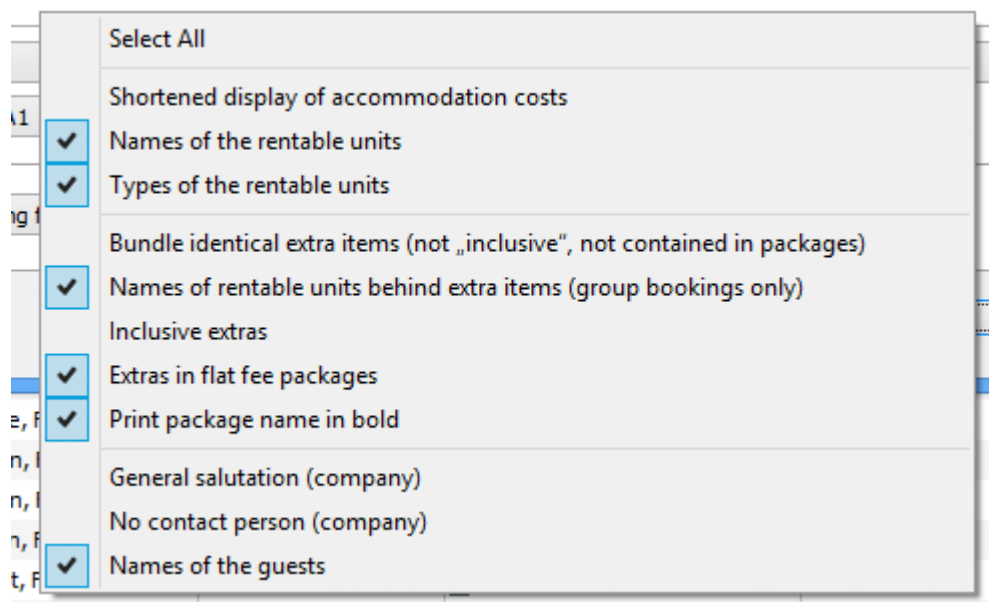
Bundle identical accommodations and **bundle identical extra items** are options very helpful when generating an invoice for a group booking. Instead of displaying every booked room separately and listing the extra items which have been added to the respective booking separately underneath each room, this options can combine identical rooms to a single invoice item and show the number of booked rooms in the quantity column.

This can shorten invoices for group bookings significantly.

You can furthermore show or hide certain items on the invoice, depending on what you need. For company contacts with a contact person listed, you can also decide, **if you want to use the general salutation instead of a personal one and if you want to print out the contact person's name in the address field.**

2. Select a **letter layout** that you've previously designed in the Preferences. By default, Lodgit Desk will select the one you've added to this object's preferences.

3. Lodgit Desk also offers several **design** options that you can choose from. First, select the filter options you need, then you can select one from the list. Use the Preview window to check the design you want to choose.

Please make sure that all necessary information for your business (especially tax information) is still displayed on the invoice. When in doubt, please contact your tax advisor.

---

4. You'll also find an option to select a different **numbering set** (e.g. because you have different sets for private and business guests). You can also select a number of a previously cancelled invoice; this way you can quickly reissue a cancelled invoice.

5. Should you have set up alternative currencies in the Preferences, you can select one here. This will display the end total of the invoice in that alternative currency as well, in a sentence underneath the invoice:

Dear Mr Smith,

We are charging the following items for your stay with us:

Title	Guests	Quantity	per Item	TAX	Line Total
SH DB 01					
8/31/2015 - 9/1/2015					
Price: 30.00 £ per night/person	2	1	£30.00	7.0%	£60.00
9/1/2015 - 9/4/2015					
Price: 40.00 £ per night/person	2	3	£40.00	7.0%	£240.00
Total (incl. TAX):					£300.00

The total amount is calculated from:
7.0% TAX   £19.63   Total (excl. TAX) £280.37

Please transfer the invoice amount until 9/22/2015 to the bank account stated below.

The total amount above is equivalent to 3,865.14 kr.

We thank you for your stay and hope to see you again in the future.

Print, send or save invoices

You can preview your invoice by pressing the button **Preview**. There, you can also **print a draft** that won't be saved. In the Actions menu, you can select if you want to **Print** the invoice, **Create a PDF** from the invoice or send the invoice as an **Email with PDF** attachment. If you want to cancel the entire process, press **Cancel**.

> *Important:*
> *If you want to send invoices **as PDF attachments via email**, you must **first enter an email address** in the guest's contact information in the Guest Management.*

When you print the invoice, the invoice data will be saved. If you don't want to save the invoice, close the window or cancel the print process.

Send invoice as an email with PDF attachment

If you want to send the invoice as an email attachment, the following window will open:
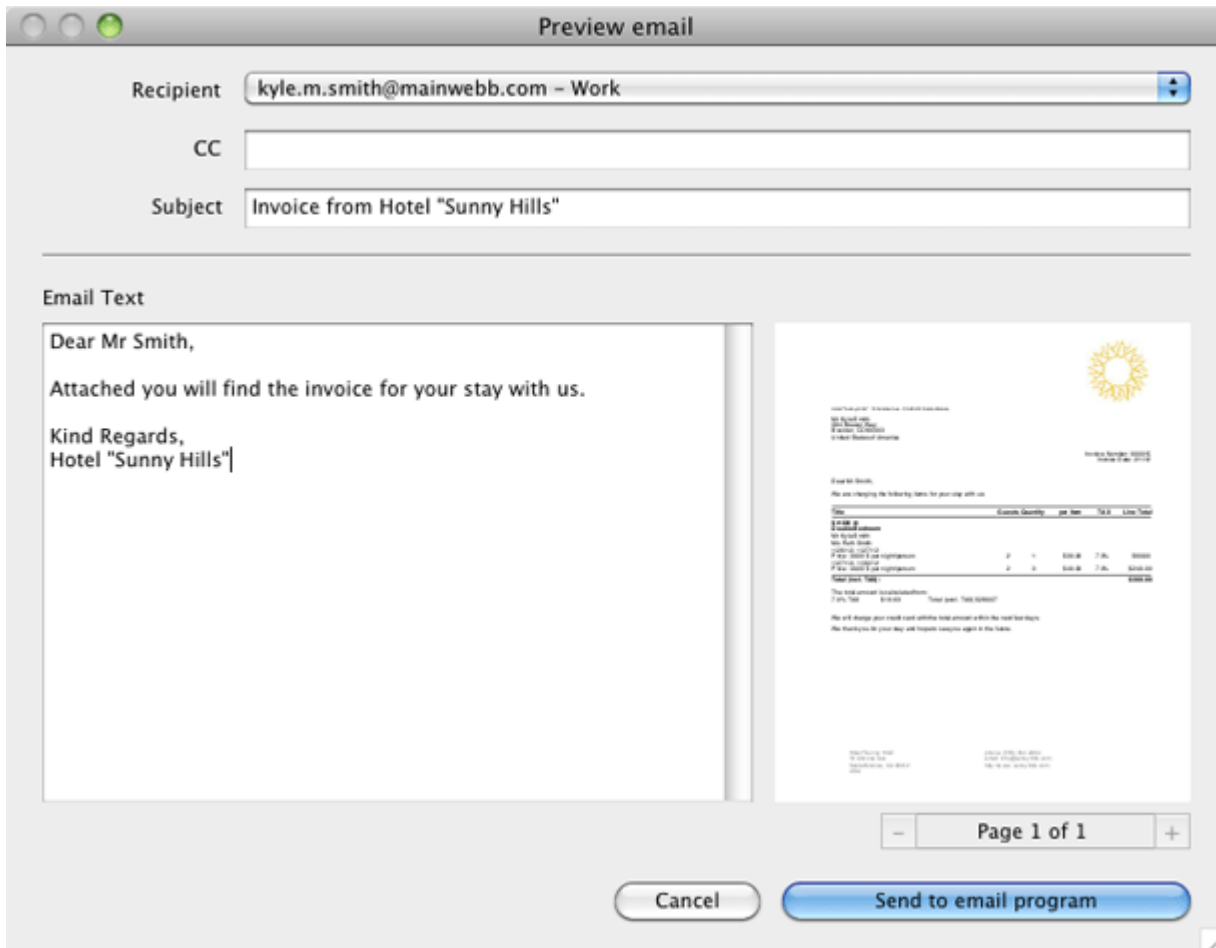
Here you can add more recipients, edit the email text and preview the invoice PDF. Once you're finished, press the button "Send to email program".

> *Note:*
> *If there aren't any outstanding items in a booking, the **"Create Invoice"** process will be cancelled and the following message will pop up:*
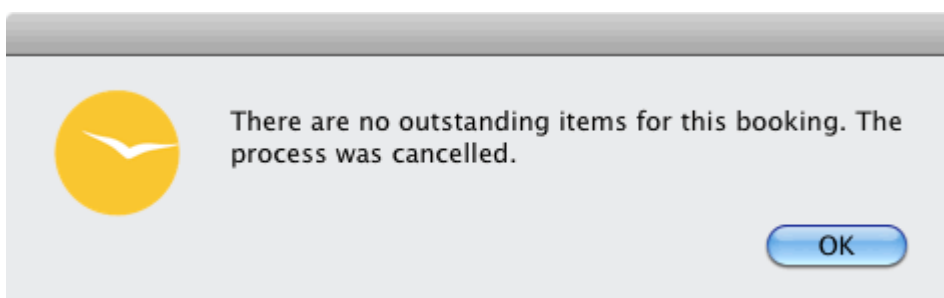
View invoices and print them once more

There are three ways to view existing invoices and print them once more:

1. Go to **Administration > Archives > Invoices** to view all invoices that you have previously created with Lodgit Desk. Here, you can print them again (more information: Manage invoices).

2. You can also view the invoice(s) for a particular booking by opening its booking window and going to the Correspondence list item. You can also print the invoice(s) again from here.

3. You can also view all invoices created for a guest by going to their guest history (in the Guest Management). More information on that can be found here.

MANAGE CONFIRMATION TEMPLATES   UP   CANCEL INVOICE

Cancel invoices
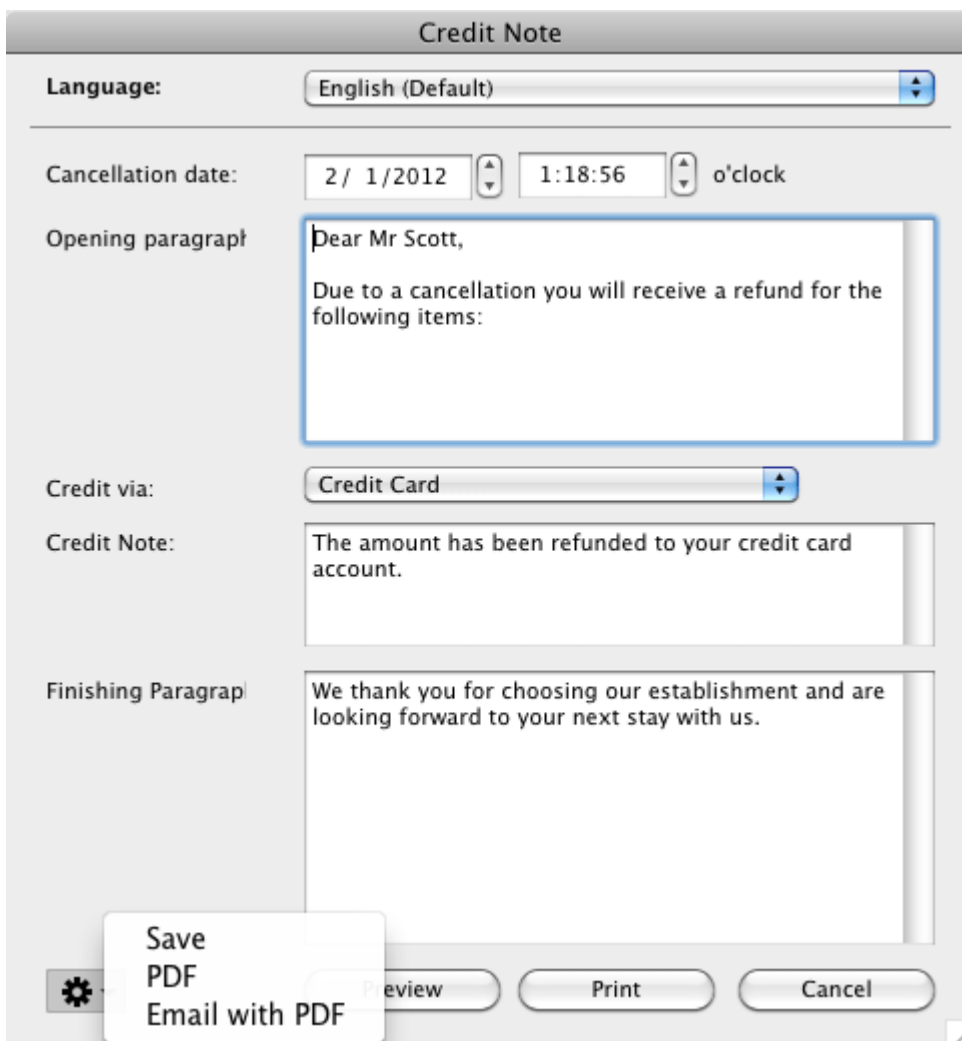
If you want to cancel an invoice you can do so by going to the Archives > Invoices, or in the booking window under Correspondence > Invoices.

> **Note:**
> *Open cash invoices cannot be cancelled because this would result in problems with the cashbook. To cancel such an invoice, either set the status to "paid" or change the payment method.*

1. Select the invoice that you want to cancel in the list and go to the **Actions menu** ⚙▾ (or the context menu) to select the item "Cancel Invoice" or "Cancel Invoice and Send Letter".

2. If you select "Cancel Invoice" the invoice will be canceled and the revenue listed for it will be balanced by an offset.

   Alternative: *Cancel Invoice and Send Letter*

3. If you have selected "Cancel Invoice and Send Letter", the window "Credit Note"

will open which allows you to create a corrective invoice. You can edit the texts that are to be printed on the credit if necessary. The original text templates can be edited under **Administration > Texts**.

4. Select a **payment method for the corrective invoice**:
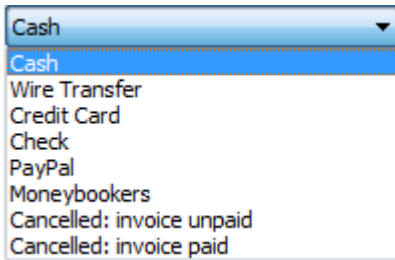
The credit text will change depending on the payment method you select. If the guest has not yet paid the invoice, you can select "Cancelled: invoice unpaid"!

If you select the option **Email with PDF**, the following window will open:
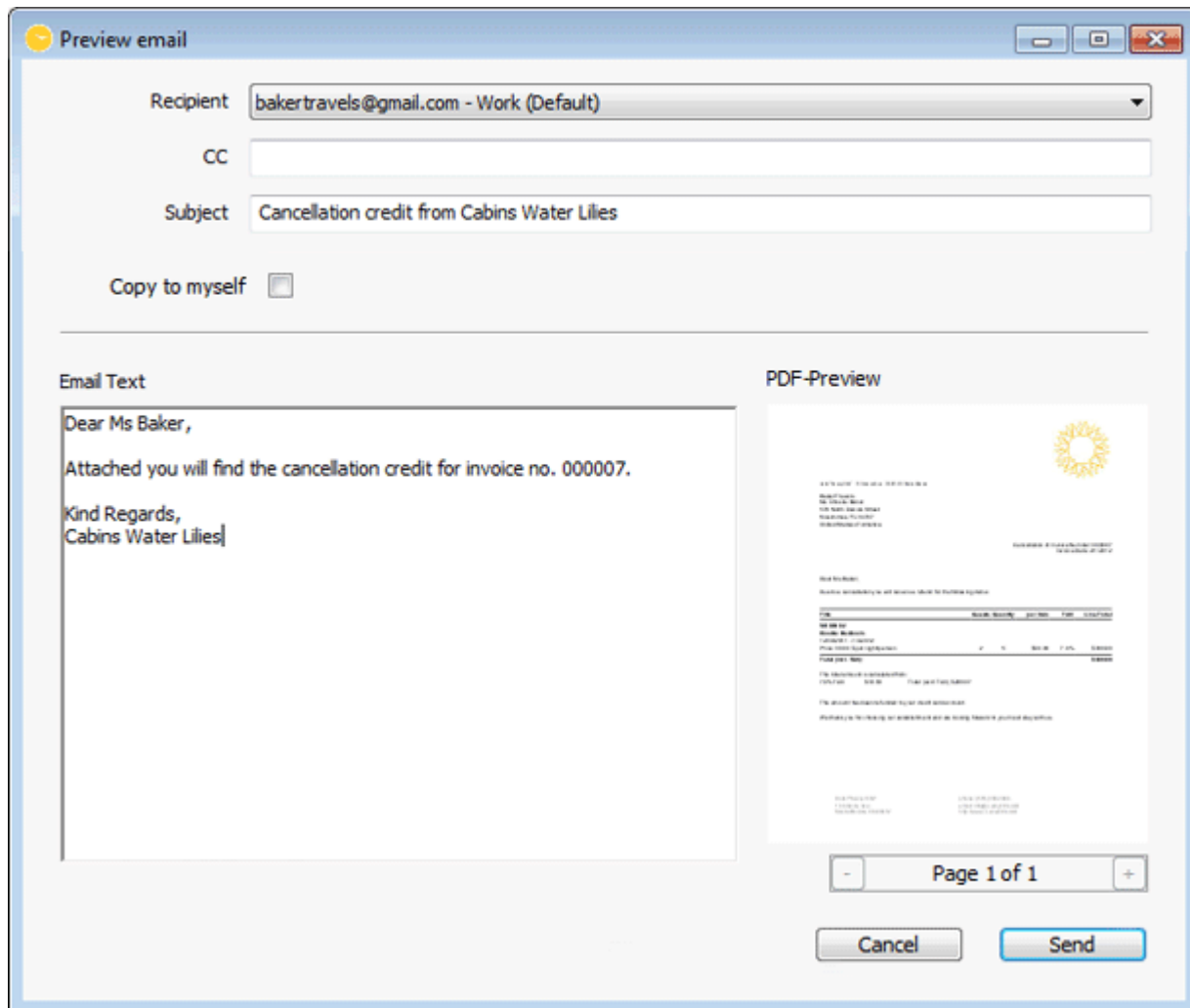
Here you can add recipients to the email, edit the email text and preview the PDF file. Once you're finished press "Send to email program" or "Send". If you want to cancel the process, press **Cancel**.

CREATE INVOICE   UP   MANAGE INVOICES

Manage invoices

To view all invoices you have created with Lodgit Desk, go to **Administration > Archives > Invoices,** or press the **Archives** button in the main window above the reservation schedule and then go to the **Invoices** area.

In the **Invoices** area you'll find all the invoices you have ever saved and/or printed.

Symbol	Status	Note
✅	Paid	Whenever an invoice has been paid, you can change its status to **Paid** using the context menu.
🟠	Open	As long as an invoice isn't paid, it has the status **Open**.
❌	Cancelled	**Open invoices** can be **cancelled** using the context menu.

You can use the **Actions** menu ⚙▾ or the context menu (right-click) to do the following:

- **Open the booking window** of the invoice's booking
- **Change status** to "paid" or "open"
- **Change the payment method**
- **Cancel an invoice**
- **Print the invoice** (optionally with preview and/or different design)

You can preview the invoice by double-clicking on its entry in the list.

> *Tip:*
> *If the new invoice is supposed to have the same number as the cancelled invoice, you can change the count under **Preferences > Numbering**.*

You can filter the list and only show entries during **a selected time frame** or only entries for **a selected object**, by using the drop down menus above the list.

You can also filter the list and only show invoices of a certain status. Simply select the status you want to show in the drop down menu above the list.

You can also **print the entire list** by pressing the "Print" button. You can preview the list by pressing the "Preview" button. You can also **export the list as CSV or Excel files** by pressing the "Export" button.

> *Note:*
> *You can sort the list by its columns. Press the column header once to sort the list by that column in descending order. Press the column header again to sort the list by that column in ascending order.*

Change invoice status to "paid"

If an unpaid invoice was paid and you'd like to record that in Lodgit Desk, you can do so by going to the archives.

1. Select the invoice that you want to set to "paid" in the list and go to the **Actions menu** ⚙▾ (or the context menu) to select the item **Change status to "paid"**.

2. A pop up window will appear so you can make sure you have the right invoice. You can also edit the date the payment was actually made.

3. Then press **Save**.

> *Note:*
> *Invoices with a payment method that has a due date of 0 days will automatically be set to the status "paid".*

Change invoice status to "open"
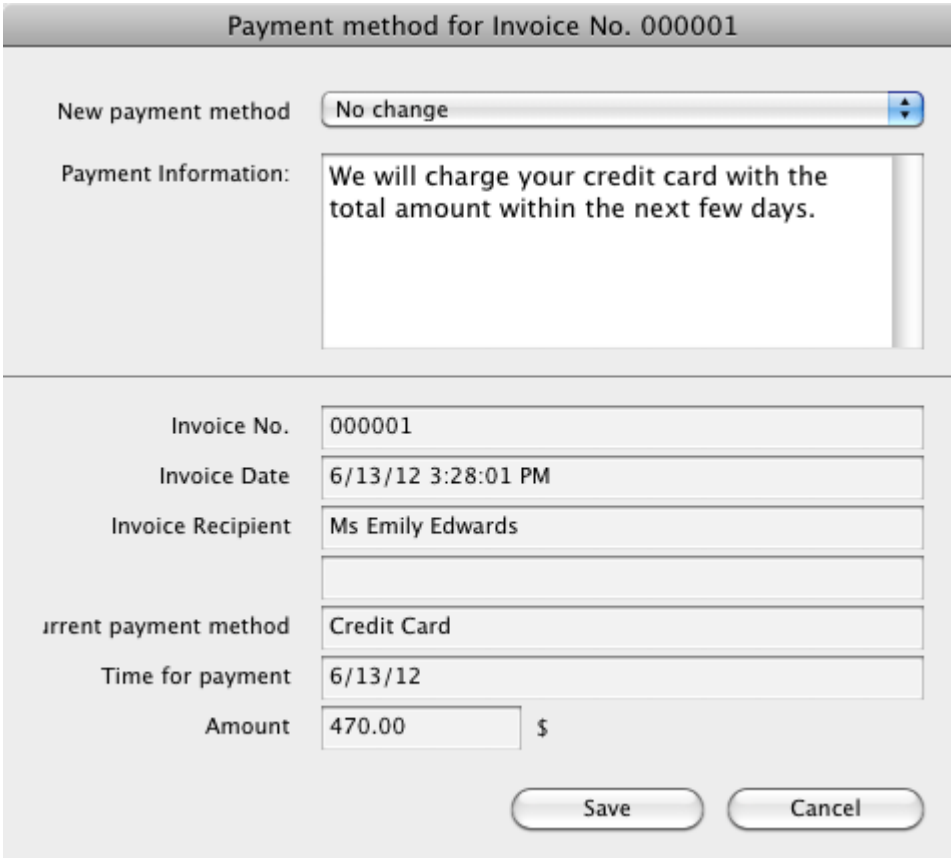
You can change the status of an invoice back to "unpaid". Simply select it in the list and select the item **Change status to "open"** via the context or Actions menu.

You can only change invoices back to "open" until they are either cancelled or their data is exported in the Accounting Export. If you want to change an exported invoice's status back to "open", please reset its export status in the Accounting Export.

Change payment method of an invoice

You can change the payment method of an invoice after saving/printing it if said invoice is still "open".

1. Select the invoice that in the list and go to the **Actions menu** ⚙▾ (or the context menu) to select the item "Edit payment method".

2. In the window that opens, select the new payment method and edit the texts for the changed invoice to your liking.

Payment method for Invoice No. 000001	
New payment method	No change
Payment Information:	We will charge your credit card with the total amount within the next few days.
Invoice No.	000001
Invoice Date	6/13/12 3:28:01 PM
Invoice Recipient	Ms Emily Edwards
ırrent payment method	Credit Card
Time for payment	6/13/12
Amount	470.00 $

Save   Cancel

3. Now click "Save". The invoice has now been edited and can be printed out to reflect the new payment method using the context menu.

Change invoice recipient

The recipient of an invoice can be changed as well as long as the invoice is still "open".

Please note the following:
By using individual customer accounts, it is no longer possible to change the invoice recipient of an invoice once created.

1. Select the invoice from the list and go to the actions menu ⚙▾ (or context menu) to select the item "Change invoice recipient"

2. In the window that opens, click "Select", choose a guest from the guest management window (or alter the current guest) and click "transfer to invoice xxx" and confirm the changes by clicking "Save".

Invoice recipient for invoice No 2016-000005		
Invoice No.	**Invoice Date**	**Amount**
2016-000005	05/08/2016	$248,00

Previous invoice recipient   New invoice recipient

Select

Address Field

Mr Kyle Smith
984 Brewer Way
80303 Boulder
United States of America

Data of the invoice recipient

Company Address	No
Salutation	Mr
Title	
First Name	Kyle
Last Name	Smith
Company	
P.O. Box	

Save   Cancel

CANCEL INVOICE   UP   CORRECTIVE INVOICE ARCHIVES

Manage corrective invoices

Go to **Administration > Archives > Corrective Invoices** or press the symbol **Archives** and select the tab **Corrective Invoice**. Here you will find a list with all corrective invoices.

The different status of the corrective invoices are shown with symbols.

Symbol	Status	Note
✅	Paid	The corrective invoice was **Paid**.
🟡	Open	The corrective invoice is **Open**. The invoice was cancelled but the money has not been refunded yet.
❌	Unpaid Invoice	The corrective invoice belongs to an **Unpaid Invoice**. No money will be refunded.

You can use the **Actions** menu ⚙️▾ or the context menu (right-click) to do the following:

- **Open the booking window** of the credit's booking
- **Change status** to "paid" or reset it to "open"
- **Edit the corrective invoice**
- **Print the corrective invoice** (optionally with preview) or **save it as PDF**

You can preview the corrective invoice by double-clicking on its entry in the list.

You can filter the list and only show entries during **a selected time frame** or only entries for **a selected object**, by using the drop down menus above the list.

You can also filter the list and only show invoices of a certain status. Simply select the status you want to show in the drop down menu above the list.

You can also **print the entire list** by pressing the "Print" button. You can preview the list by pressing the "Preview" button. You can also **export the list as CSV or Excel files** by pressing the "Export" button.

> *Note:*
> *You can sort the list **by its columns**. Press the column header once to sort the list by that column in descending order. Press the column header again to sort the list by that column in ascending order.*

Manage invoices   Up   Correspondence

Correspondence

To view all correspondence - emails and letters - press the **Archives** button in the main window above the reservation schedule.

Under **Correspondence** you will find all letters and emails created with Lodgit Desk.

You can filter the list of the correspondence by defining a **time frame**.

> *Note:*
> *You can sort the list by its columns by clicking on the column headers. Clicking once will sort the list by this column in descending order. Clicking again will sort it in ascending order.*

You can view and print the letter again by double-clicking on it.

You can also print the letters or send the emails again right away by using the context menu.

You can also **print the entire list** by pressing the "Print" button. You can preview the list by pressing the "Preview" button. You can also **export the list as CSV or Excel files** by pressing the "Export" button.

Letter Templates

You can write texts for letter templates that you can then use again at a later time. Once a template is created, you'll be able to select it from the drop down menu at the top right corner of the letter window.

You can create and manage your letter templates in the **letter window**:
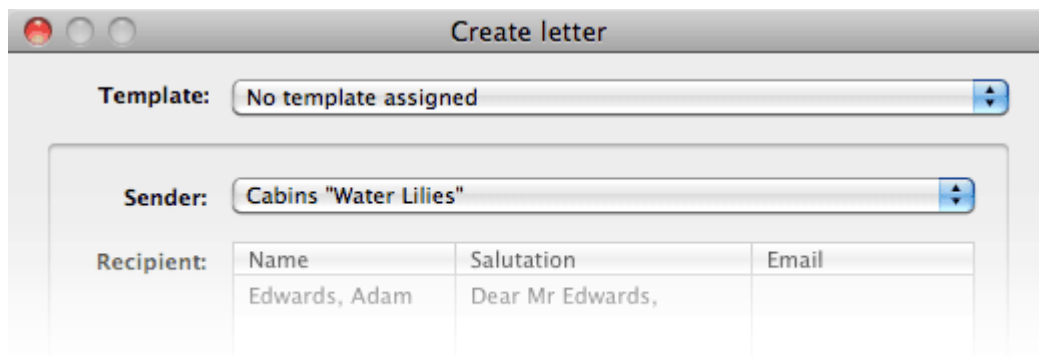
Create letter templates

When creating a letter in the **letter window**, you have the option to save that letter as a template. Simply select **Save this letter as a template...** from the drop down menu in the upper right corner.

Once selected, you'll be asked to pick a name for your template. Once the template saved, it will appear in the list under **Template**.

Select a letter template

While creating a letter in the **letter window**, you can select a template you want to use. Simply select a template from the drop down menu **Template** in the upper right corner. This will load the content of the template into your current letter window.

Manage letter templates

You can rename or delete the templates as well. Simply select **Manage templates...** from the drop down menu in the upper right corner. This will open the **Manage Templates** window:

Vorlagen verwalten

Bezeichnung

Geburtstagswünsche

OK
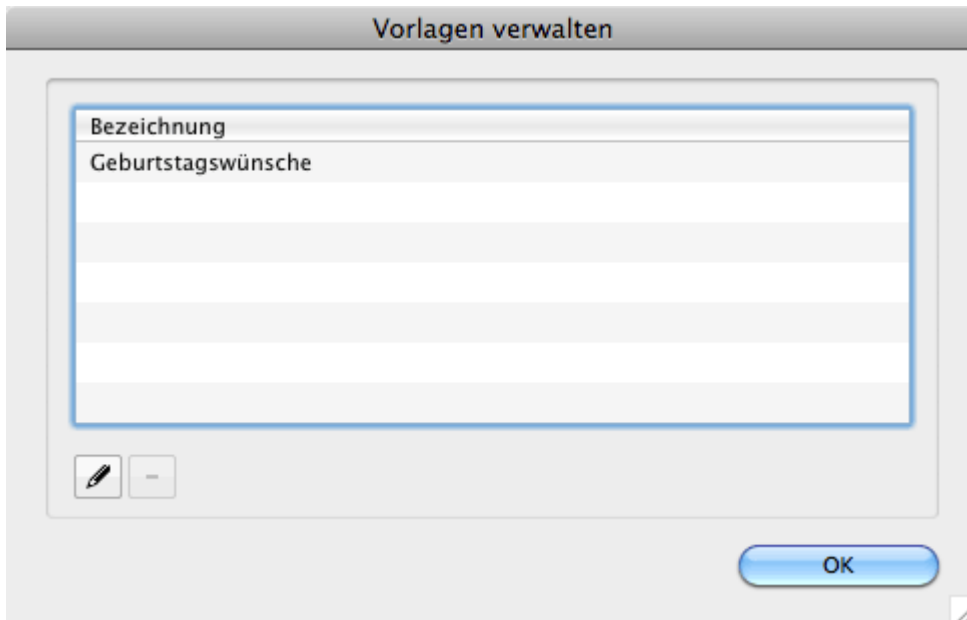
To rename a template, double-click on its name or select it and press the "Edit" button.

To delete a template, select it and press the "Delete" button.

CORRESPONDENCE   UP   DUNNING RUN

Dunning Run

With Lodgit Desk, you can easily create dunning notices for unpaid invoices. To do that, go to **Administration > Dunning Run**. A new window will open:

1. First you'll select the object, for which you want to do a dunning run.

   Hint:
   *If you manage **several objects** you can do a dunning run in two ways: Either you can do a general dunning run with a general sender's address (set up in the Preferences) or do an individual dunning run for each object with the corresponding sender's address.*

2. Next, select the key date for the dunning run. This is the date up to which all open invoices will be selected. The date can lie in the future and will then be listed on the dunning notices.
   If you don't want to send out reminders for smaller invoice amounts (e.g. anything below EUR 20), you can set this as a threshold.

Should you have changed default currencies during your use of Lodgit Desk, you can also select the currency you want to send out reminders for. It's not possible to do a dunning run of different currencies at the same time.

3. Select the days for the dunning levels and the corresponding dunning fees. Lodgit Desk will remember these settings for next time.
You have the options to include fees for dunning notices that were reset as well as create collective dunning notices for a client. Do so by checking the corresponding boxes.

It's not possible to create a collective dunning note for guests that have been deleted from your files. In those cases, you must create a reminder for each open invoice.

---

4. Finally, you can decide which letter layout you want to use. If you want to do the dunning run for **multiple objects,** the system will automatically suggest using the **general return address and the general letter layout**. You can change these through the drop down menus.

> *Note:*
> *The texts for the notices can be adjusted in the Text Management.*

After you press the button **Continue**, the invoices that need to be dunned will be displayed:
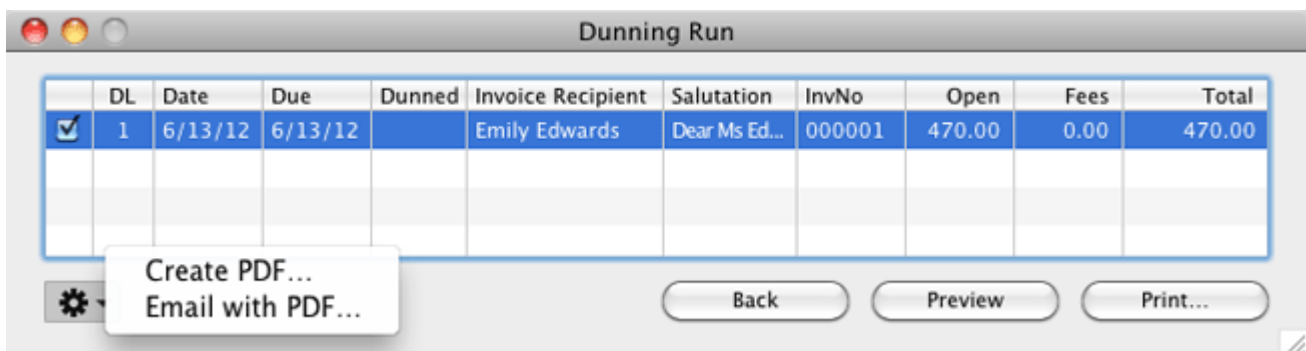
> *If you have **hidden invoices in the list of open invoices,** they will not be included in the dunning run. You can unhide them in the list of open invoices to include them again.*

Press the button **Preview** to take a look at the notices, press the button **Print** to print them. Here, you can also create **PDF** files from selected dunning notices or send them as an **email with PDF** attachment.

By pressing the button **Back**, you can go back to the settings as described above.

After you have printed the dunning notices, the following window will appear:

Do you want to update the dunning levels of the
printed payment reminders?
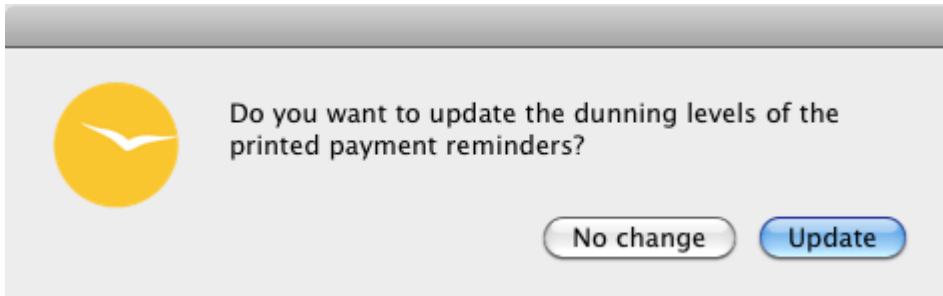
No change   Update

If you want the invoices to receive a higher dunning level, press the button **Update**, otherwise press the button **No change**. You can also downgrade the dunning level later on in the list of unpaid invoices.

MANAGE CORRESPONDENCE TEMPLATES   UP   LIST OF UNPAID INVOICES

List of unpaid invoices

With Lodgit Desk, you can quickly take a look at all unpaid invoices. To do that, go to **Administration > List of unpaid invoices**. This will open a new window:

Date	Invoice Number	Invoice Recipient	Method	Due (days)	Due Date	Days sinc
09/05/2014	2014-0155	Mary Bell	EC Cash	6	15/05/2014	
09/05/2014	2014-0156	Baker Travels	Debit	1	10/05/2014	
10/05/2014	2014-0157	George Anderson	Wire Transfer	15	25/05/2014	
11/05/2014	14.00060	Scott Travels	Wire Transfer	15	26/05/2014	
14/05/2014	0040/WL	Scott Travels	Credit Card	1	15/05/2014	

Total	Level 0	Level 1	Level 2	Level 3	Level 4
3,290.71	3,290.71	0.00	0.00	0.00	0.00

This lists all invoices that have the status "unpaid" in the system. You'll find information about invoice date, invoice recipient, payment method, amount, time for payment as well as if and how long the time for payment was exceeded. You can also see if there was already a dunning notice created for the invoice and what the dunning level for this invoice is.

Underneath the list you can find a summary of the outstanding amounts: the total amount as well as the amounts listed by their dunning level.

With the context menu (right-click) you can:

- open the corresponding invoice
- set the invoice status to "paid"
- print the invoice (with or without preview as well as PDF files)
- downgrade the dunning level

You can also use this context menu to:

- hide and unhide an invoice
- show all hidden invoices

Hidden invoices will be ignored during a dunning run. You can use this feature for invoices that you know are 'lost' and cannot be retrieved any longer.

DUNNING RUN   UP   TEXT MANAGEMENT

Text Management

In *Administration > Texts* you can adjust all printable texts to your needs and create new language sets for your international clients.

Lodgit Desk allows for two methods on how to do that:

1. You can edit the text elements **within Lodgit Desk**.
2. You can export the text elements and then edit them with the free **tool Lodgit Desk Lingua**.

... in Lodgit Desk

Within the Text Management (*Administration > Texts*) you can find all the text elements that will be printed out in a table:
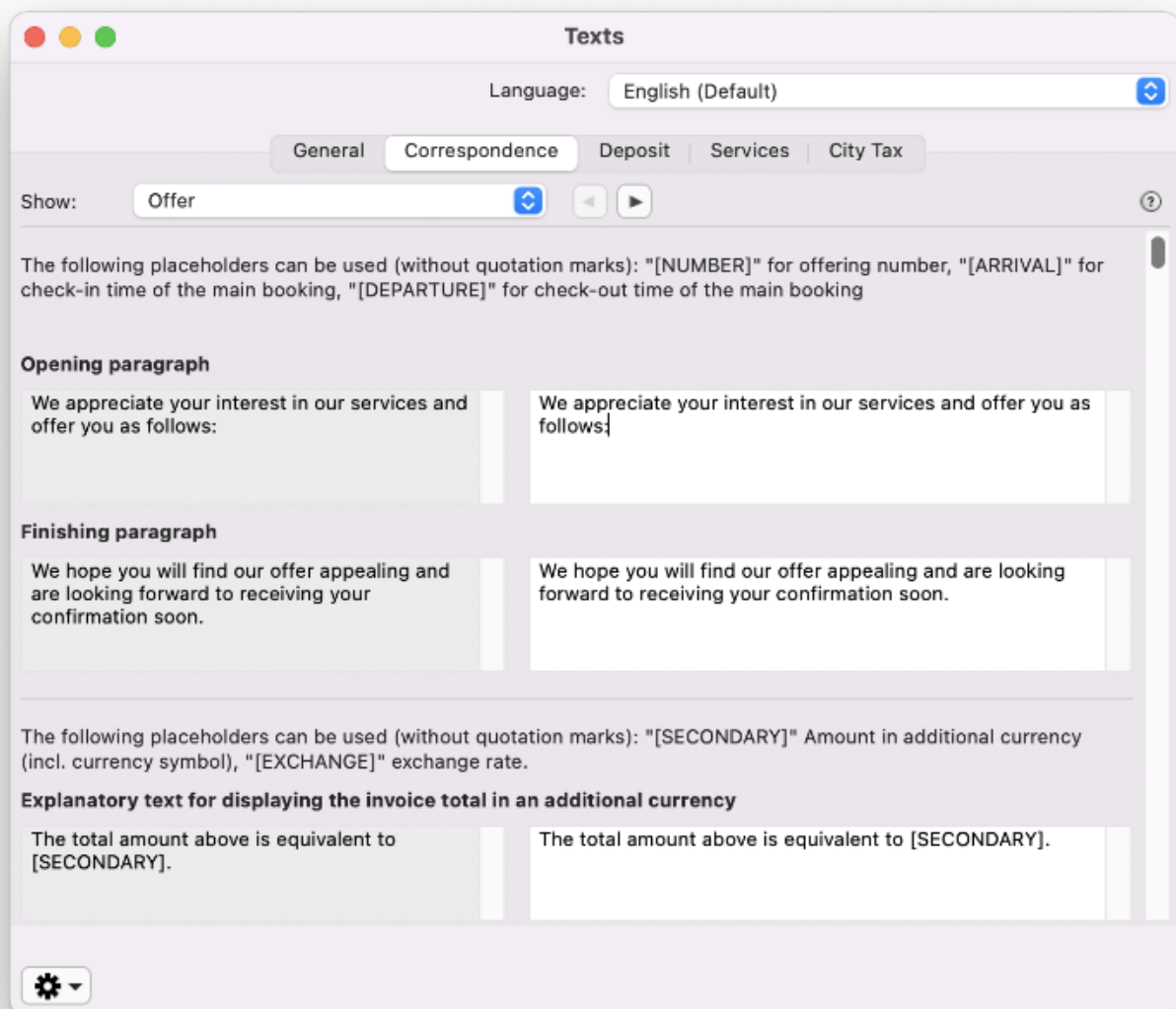
You can edit **the texts in the column on the right** as you like. The texts in the left column are there to help you identify where the text element will be shown and what it says.

You can find more information (e.g. how to add a new language set) **here**.

... with the tool Lodgit Desk Lingua

Click the cogwheel symbol in the lower left corner of the Text Management to open the **Actions menu**:
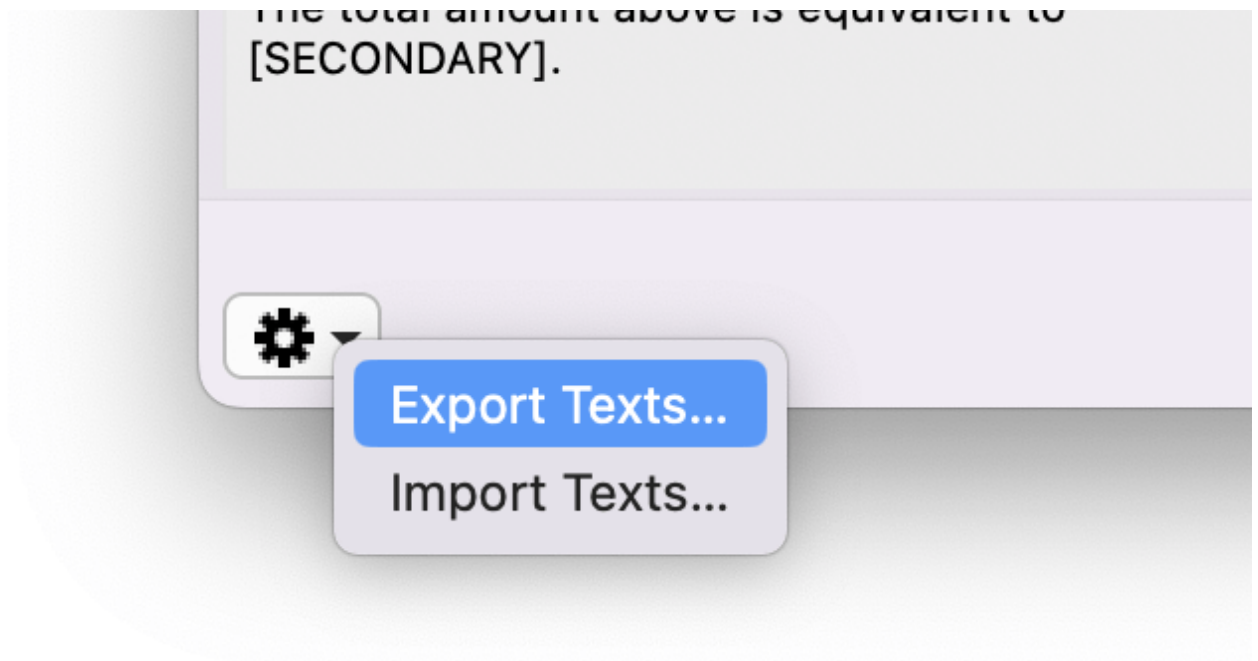
With the action **Export Texts** you can export all text elements into a new file which you can then **edit with the free tool Lodgit Desk Lingua**. This method is best when you want to add a completely new language set (e.g. Spanish) because this allows you to search for certain elements.

Export texts

Please select the template that you want to use as base for your translation:

Template   English (Default)

Export   Cancel
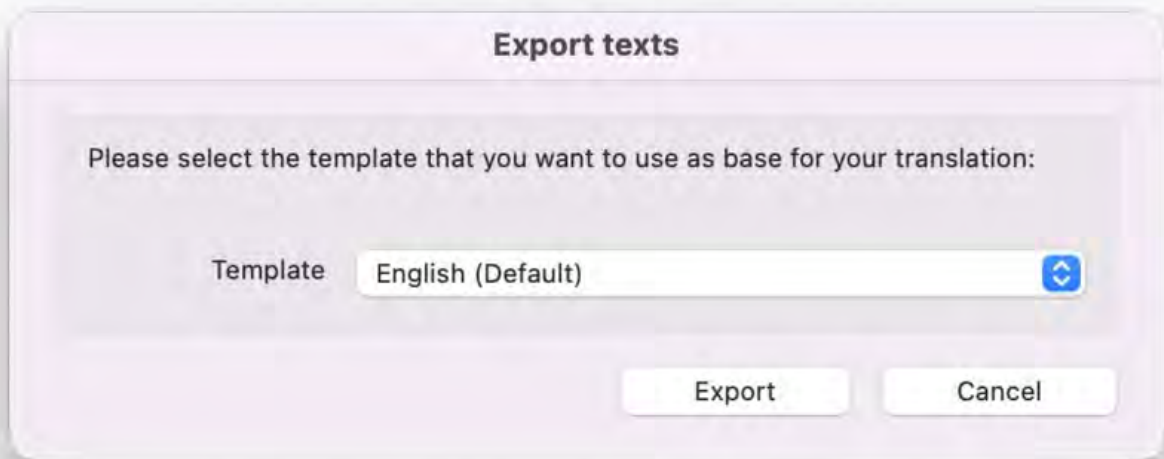
You can find more information (e.g. where you can download the tool) **here**.

List of unpaid invoices   Up   Edit texts in Lodgit Desk

Edit texts in Lodgit Desk

In the Text Management in Lodgit Desk (**Administration > Texts**) you can find a table with all printable text elements:
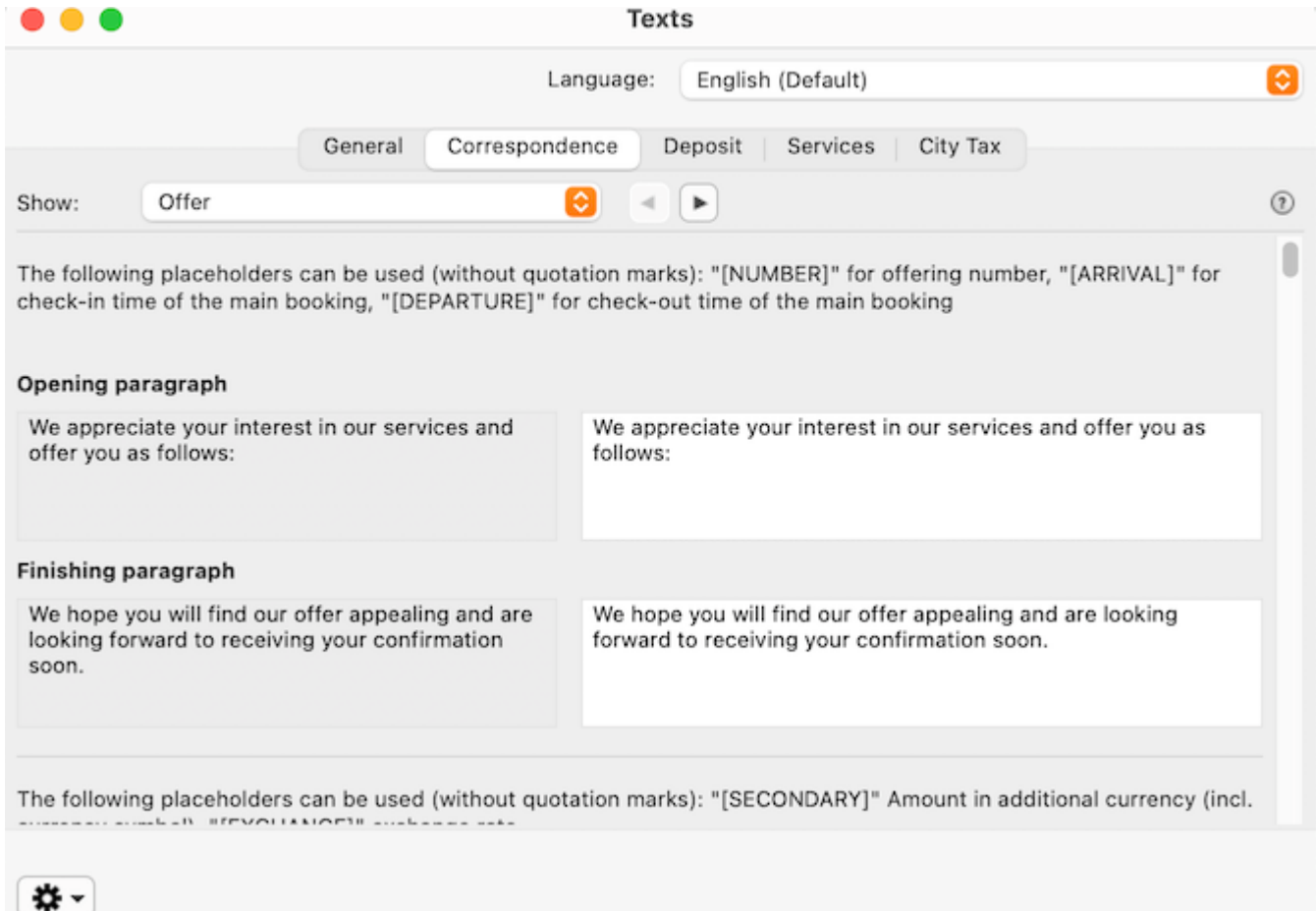
The left column lists the text template. They're used for better understanding where the text will appear and what information is given. This text does not change, even if the the right side of the table is edited.

The right column lists the texts that you can edit and adjust to your needs.

Add a new language set

In the drop down menu **Language** you'll find the option **Add New Language**. This is the option you use to create a new language set to translate:

Select the set that you want to use as a template (these texts will appear in the left column). Enter a name for your new language set (e.g. YourCompany1 or Spanish) and select the base language (e.g. English).

After you've clicked "Save" you can edit the texts in the right column to adjust them to your needs. The texts in the left column are a template and can help you understand better where the text will appear on the correspondence.

Where and what?

In order for you to be able to find a certain text element as fast as possible, we have made a list below. As an alternative, you can also export the texts and then edit them with Lodgit Desk Lingua.

1. **General**
   1. **Payment Methods**:
      Names of the payment methods, texts for payment terms on invoices and cancellations
   2. **Price Units**:
      Names of the price units
   3. **Unit Types**:
      Names of the unit types, names of custom unit types
   4. **Salutation**:
      Salutations for correspondence
   5. **Details of Accommodations**:
      e.g. "for 1 person"
2. **Correspondence**
   1. **Offer**:
      First and last paragraph, different texts for offers with and without a deadline, different texts for offers with and without a return confirmation, different texts for emails and letters, email subject line, table headers and letter head (offer number and date)
   2. **Confirmation**:
      First and last paragraph, different texts for confirmations with and without a return confirmation, different texts for emails and letters, email subject line, table headers and letter head (confirmation number and date)
   3. **Return Confirmation**:
      Subject line, first and last paragraph, additional paragraphs, signature fields (date, signature)
   4. **Deposit Invoice**:
      First and last paragraphs, notes for tax details, subject line and body

for sending via email, letter head, table headers
5. **Cancellation of a Deposit Invoice**:
First and last paragraphs, notes for tax details, subject line and body for sending via email, letter head, table headers
6. **Invoice**:
First and last paragraphs, notes for tax details, subject line and body for sending via email, letter head, table headers
7. **Cancellation of an Invoice**:
First and last paragraphs, notes for tax details, subject line and body for sending via email, letter head, table headers
8. **Dunning Notice**:
Different subject line, first and last paragraph for 4 dunning levels, subject line and body text for sending via email, letter head, table headers
9. **Letters/Emails**:
City and date
10. **Receipt - Sale (with receipt recipient)**
First and last paragraph, additional text
11. **Receipt - Sale**
First and last paragraph, additional text
12. **Receipt - Purchase**
Introduction of details in header (Type, Number, Date), table inscriptions for items, amounts description, info for tax purposes
13. **Receipt - Others**
Introduction of details in header (Type, Number, Date), table inscriptions for items, amounts description
3. **Deposit**:
Different texts for outstanding and paid deposits in offers and confirmations, texts for the deposit items on deposit and final invoices
4. **Services**
1. **Rentable Units**:
Names and descriptions of rentable units, separated by objects
2. **Extras**:
Names and descriptions of extras
3. **Packages**:
Names of packages
5. **City Tax**
Different texts for the declaration of a city/accommodation tax depending on where and how they are shown on the final invoice

TEXT MANAGEMENT   UP   EDIT TEXTS WITH THE FREE TOOL LODGIT DESK LINGUA

Text Management with Lodgit Desk Lingua

The Text Management under **Administration > Texts** lists all text elements that are used in Lodgit Desk. You can export these elements into a file and then translate them either yourself or have them translated by a professional using the free tool Lodgit Desk Lingua.

This is how you can do it:

1. Export language file

In Lodgit Desk you have the option to export your language sets to give them to a translator for the creation of a new set, for example.

To do that, use the Actions menu in the Text Management and then select **Export Texts**.
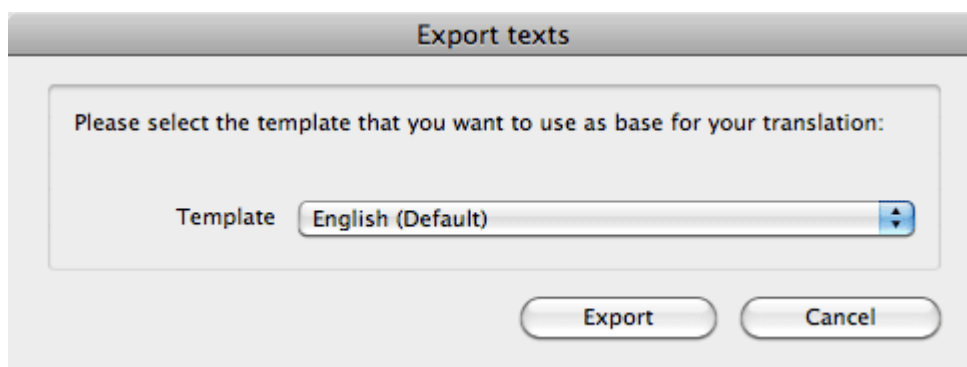
Select the existing language set that you want to use as base for your new one and press **Export**. Save the file on your computer.

2. Download Lodgit Desk Lingua

Log in to your account on www.lodgit.com. Go to the area **Download** where you'll find the newest version of Lodgit Desk as well as the tool **Lodgit Desk Lingua**. Download the version that you or your translator need.

3. Edit file

Open the .ldlocale file that you have exported with Lodgit Desk Lingua:
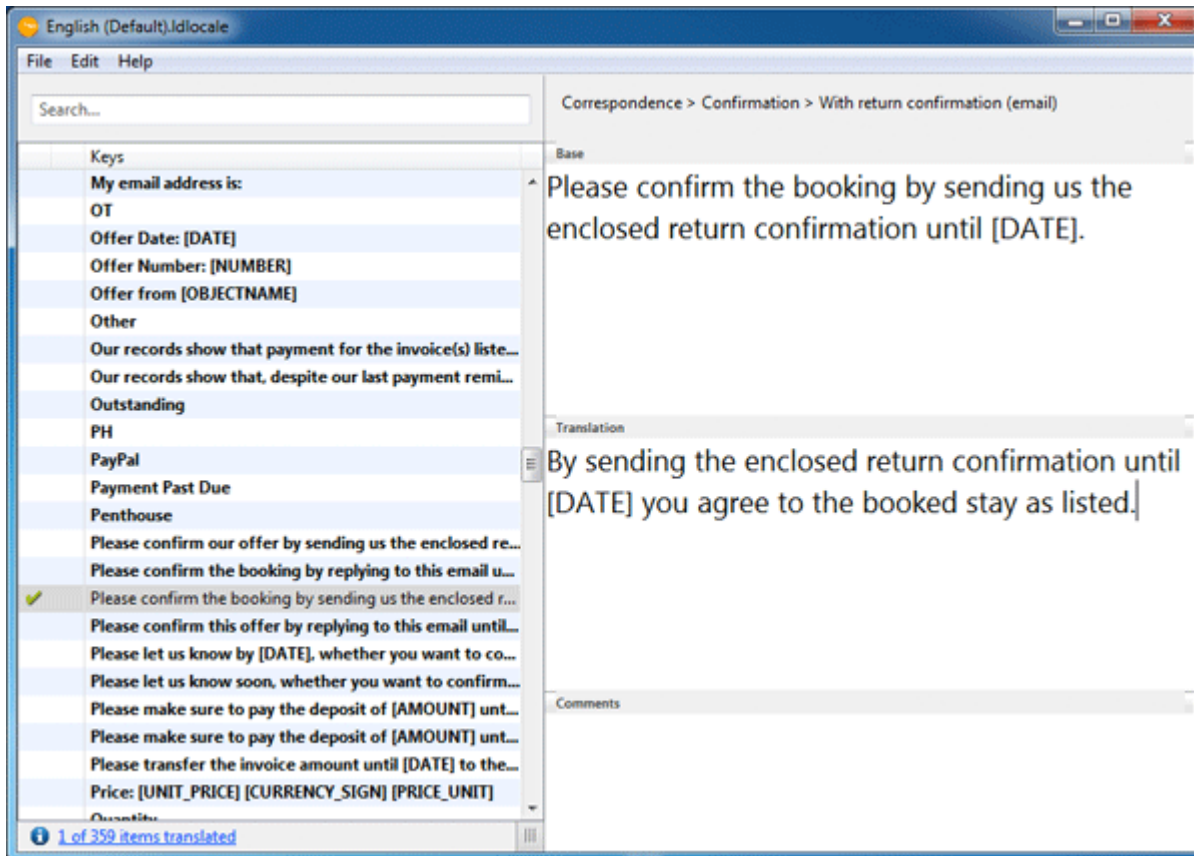
In the **left list** you'll find all text elements. All **bold** elements have not yet been translated or edited. If you import the file now, those elements will not be changed.

The field **Base** contains the exported text. This field cannot be edited; it is used to better understand the kind of information a text element contains.

You will enter your edited texts into the field **Translation**. If you only want to make minor changes, you can copy and paste the text from the Base field. Please note that the text in Base will be replaced with the text in Translation during the import.

You can enter any comments you may have for other users, e.g. the translator, into the **Comments** field.

At the top right, you'll find the **path** of the text element in the **Text Management**. That way, you'll also be able to find the element in Lodgit Desk and you can make 'just a quick' change.

> *Note:*
> *Changes to the file will be saved instantly, you do not need to manually save.*

4. Import language file

Once you have your translated or edited language file, go to the Text Management and select **Import Texts** from the Actions menu.
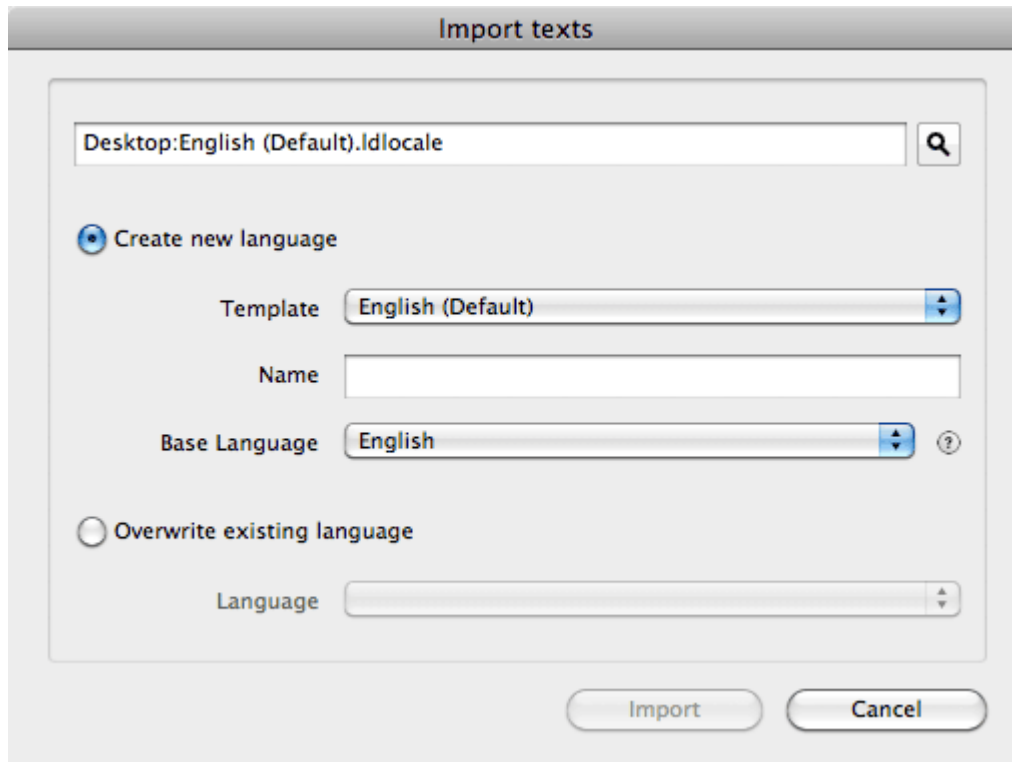
After you have selected the file you want to import you can decide whether you want to add this set as a new language or overwrite an existing set.

If you want to **add a new language** enter the name for it and select a base language. The template you select will appear in the left column.

If you want to **overwrite an existing language** select it from the list.

When you're done, click on **Import** and your set will be imported into your Lodgit Desk.

Edit texts in Lodgit Desk   Up   Create receipts & Cashbook

Create receipts & check cashbook

Lodgit Desk also allows you to manage, document and invoice earnings and spendings that are independent from bookings in your reservation schedule. For example items you sold on site and that have been paid immediately with cash, cheque, credit or debit card.

An overview of all past turnovers not connected to bookings can be found in **Administrations > Correspondence > Receipts.**

Furthermore all cash turnovers connected and not connected to bookings will be recorded in the Cashbook which will give you an overview over of your cash holdings.

In order to enter new earnings (e.g. sales) or spendings (e.g. purchases) please head to **Administration** > **Create receipt** ...

Enter sales

You can enter a new sale right on the first page of the cash desk window:

First you need to select an item to sell from the list of extra items in the bottom left

corner of the window. Alternatively you can use the **History** button to get a list of recently used items to quickly choose from or use the **Individual** button to freely enter the name and price of an item that has not been set up as an extra item in Lodgit Desk. By clicking the **>** button you can add it to the current receipt.

Repeat this for every item you want to sell right now.

The **X** button removes a selected item from the receipt again.

Finally you can specify some additional options in the top half of the window:

- The **date** which is supposed to appear on the receipt and on which you want to have this transaction in your financials
- The **numbering** which should be used for the receipt
- The **object** which this transaction should be attributed to
- The **payment method** used by your customer

The **cashbook** will only contains transactions with the payment method cash.
A list of all past receipts can be found in **Administration > Correspondence > Receipts.**

- optionally: a **recipient** whose name and address you want to have printed on the receipt
- optionally: an **additional currency** in which the total should be displayed in
- the **language** in which you want the receipt to be written in, the **design** of the receipt and the **letter layout** that should be used

We recommend you to **preview** the receipt and - if everything is correct - you can either **print** the receipt, **save it as a PDF** file on your computer or simply **save it in Lodgit Desk** using the cogwheel button at the bottom of the window.

Enter purchases

Purchases and other expenses can be entered in Lodgit Desk as well. It works similarly to entering sales: In the bottom left corner of the window you can either select one of your last purchases from **History** or use the **Individual** tab to enter a new one. Type a **description**, **price** and select a **tax rate** and **account number** if applicable. Using the **>** button you can add this item to the current receipt.

Repeat this for every item you would like to enter. If you need to remove an item from the receipt again you can do so by selecting it and clicking the **X** button.

Now you can modify some other preferences in the upper half of the window (**date, numbering, payment method, object**) and enter information about the **original document / reference**.

The cashbook will later on only display those purchases with the payment method cash. All other purchases can be found in Administration > Correspondence > Receipts...

We recommend you to **preview** the receipt and - if everything is correct - you can either **print** the receipt, **save it as a PDF** file on your computer or simply **save it in Lodgit Desk** using the cogwheel button at the bottom of the window.

Enter funds transfers

If you transfer cash funds from your premises to your bank or vice versa or if you want to make a private withdrawal or deposit, these transactions can be entered into Lodgit Desk as well using the corresponding functions of the cash desk.

Each of those functions work fairly similar. Let's for example transfer 1000€ cash you have to your bank account. To do this select **Cashbook to bank (funds transfer)** in the Cash Desk window. As such a transfer has not been done before please switch from the History tab to **Individual** in the bottom left corner of the window.

Enter a **price**, a **description** and an **account number** and add this item to the current receipt by clicking the **>** button.

If you need to delete an item from the receipt again you can select it and click the **X** button.

We recommend you to **preview** the receipt and - if everything is correct - you can either **print** the receipt, **save it as a PDF** file on your computer or simply **save it in Lodgit Desk** using the cogwheel button at the bottom of the window.

This transaction can now also be found in the **cashbook**. It reduces your balance by 1000€.

Cashbook

While the cash desk feature of Lodgit Desk allows you to enter transactions not connected to bookings, the cash book will give you an overview of all cash funds you have on your premises.

The cash book contains all transactions that have been made with the payment method cash. This includes invoices of bookings paid cash, cash sales or purchases with simple receipts as well as funds transfers and private withdrawals and deposits for which a receipt has been created.

Manage receipts

To view all receipts you have created, go to **Administration > Correspondence > Receipts**

In the upper area of the window you can specify a **time frame** and which date to relate to in order to filter the search. You can also deliberately search for certain **types** of receipts or display only the receipts for **individual objects**.

Double clicking on an entry in the list opens up the corresponding receipt which can also be printed again.

List items with a yellow icon in the very left column have not been printed yet, items with a green icon have. If you want to print those again, a "duplicate" note will be included in the receipt.

EDIT TEXTS WITH THE FREE TOOL LODGIT DESK LINGUA   UP   BALANCING THE CASHBOOK

Balancing the cashbook

Whenever the cashbook is handed over, you should create and save a balance.

> *Important:*
> *Creating a balance is an action that can not be undone!*

In order to balance the cashbook, go to **Administration** and then select **Cashbook**. A new window will open where you can find the button **Balance**.

The **cashbook** shows all cash payments, sales, purchases, and other transactions for which a receipt has been created since the last balance.

Please print a list of the current entries before clicking the Balance-button.

When you click on **Balance** without printing the cashbook, you will be asked in a new window, whether you want to print the balance.

You can choose between the current day, yesterday and the day before yesterday as a date on which you want the balance to happen and specify a time freely.

If you don't need a printout, you can press the **Save Now** button. If you want to stop the process, press **Cancel**.

> ### *Note:*
> *Every balance of the cashbook will be saved under Administration > Cashbook archives.*
> *The archives allow you to print out older balances as well.*

CREATE RECEIPTS & CASHBOOK   UP   CASHBOOK ARCHIVES

Cashbook archives

If you want to revisit previous cashbook balances, you can go to **Administration > Cashbook Archives...**

Simply select the balance within the month that you want. By pressing **Preview** you can take another look at the balance and by pressing **Print** you can print it out again.
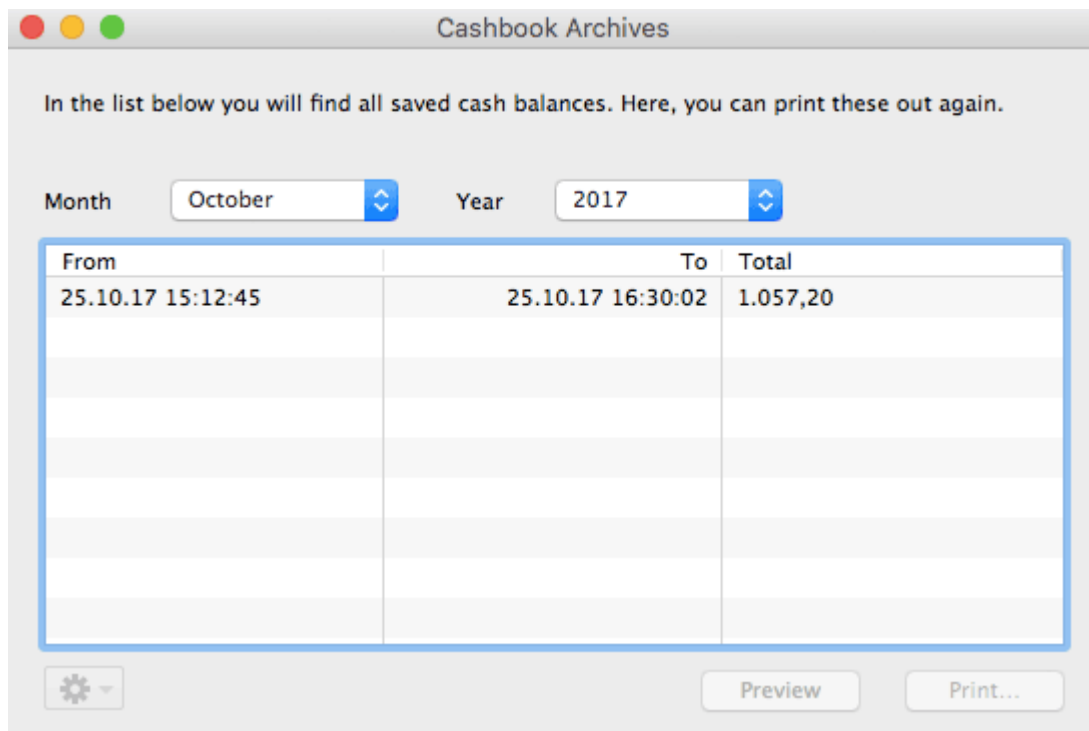
BALANCING THE CASHBOOK   UP   FINANCIAL REPORTS

Financial Reports

You can get an overview over all created invoices during a certain time frame by using the Financial Reports option in Lodgit Desk. As long as the invoice date lies within the selected time frame, the invoice will be shown.

1. To view a financial report, go to **Administration** and then **Financial Reports**. A new window showing the **List** will open.

2. You have two options to select the time frame for the financial reports:
   - the **free choice** using two calendar sheets that allow you to select a date for the starting and a date for the ending point and
   - the selection of a time frame using a drop-down-menu that allows you to easily pick certain **months, quarters, six-month-periods** or **years**.

3. On the right side, please select whether you want to analyse invoices and/or cashbook entries. There you can also choose to exclude unpaid invoices from the analysis by selecting the option "ignore unpaid invoices".

4. You can also limit the analysis to a certain object or rentable unit of yours by selecting it in the drop-down-menu.

The invoices are labelled with a certain symbol, depending on whether it is a paid ✅, an unpaid 🟠 or a cancelled ❌ invoice.

Note: In order for the balance to be correct, cancelled invoices will appear under

Incoming (payments) as well as under Outgoing (payments).

Charts for the Financial Reports

Lodgit Desk can generate charts of your financial reports for you to print out. You can access those by clicking on the **Chart** button.
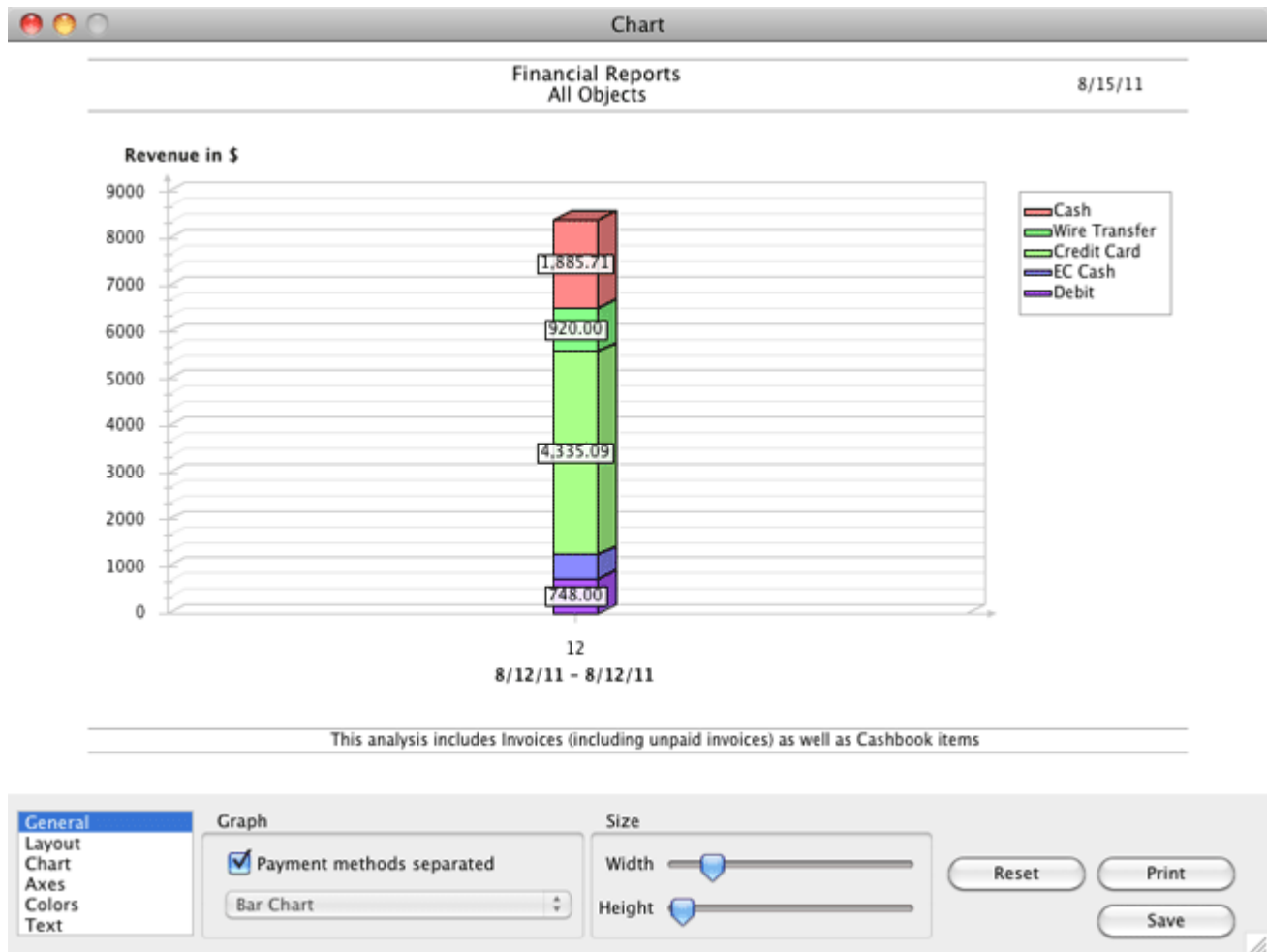
The charts offer several options so that you can customise them:

General lets you decide how large your graph is going to be. You can also choose if you want to show payment methods separately and what kind of graph you want to use. For the financial reports, you can choose between a bar and a line graph.
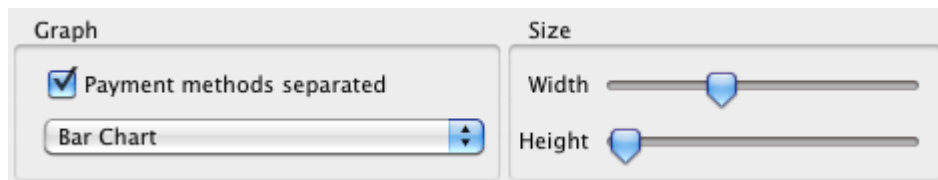
Layout lets you decide whether you want to see the grid in the graph, whether you will show a key and where you want the key to be.
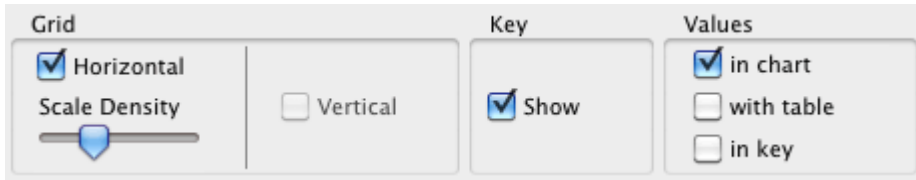
Settings concerning the graph itself can be found under **Chart**. For a bar chart, you can decide how wide the bars will be as well as whether you want to add a 3D effect to them. For a line chart, you can decide how thick the lines will be.
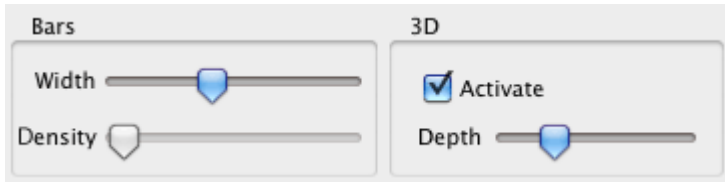
Axes will let you decide, whether you want to show the x- and the y-axe, as well as how dense you want the scaling of the y-axe to be.
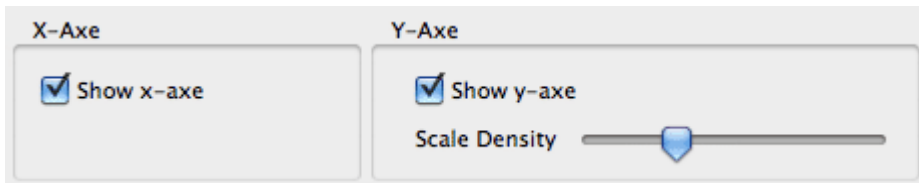
You can define colours for bars and lines under **Colours**.

Under **Text** you can define the font sizes within the chart.
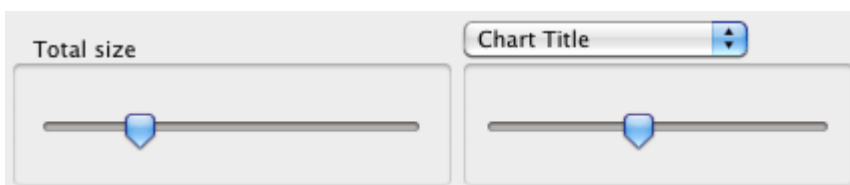
Tip:
You can reset all settings back to the standard by pressing the **Reset** button.

Analysis

Under **Analysis** you can evaluate all billed items (invoices and/or cashbook entries)

within a certain time frame. This analysis can be done for "everything", payment methods, tax rates or type of income (lodging, extras, deposits).

You can either have the analysis done for the total of the selected time frame or, more detailed, by day, month or year:

If the time frame covers **up to 31 days**, the detailed analysis will be done **by day**. If the time frame covers **between 32 days and 12 months**, the detailed analysis will be done **by month**. If the time frame covers **more than 12 months**, the detailed analysis will be done **by year**.

Revenue from **units that were later moved to a different object** will be split accordingly: Revenue generated until the move, will be listed with the old object. The rentable unit will be highlighted. Revenue generated after the move will be listed normally under the new, current object.

Charts for the analysis

Once again, you can generate a chart for this analysis, however the display option "General" cannot be used.

Select a display option (by taxes, by payment method, by type of income) and then

generate the chart by clicking on the **Chart** button.

Here's an example for the display option "by taxes":
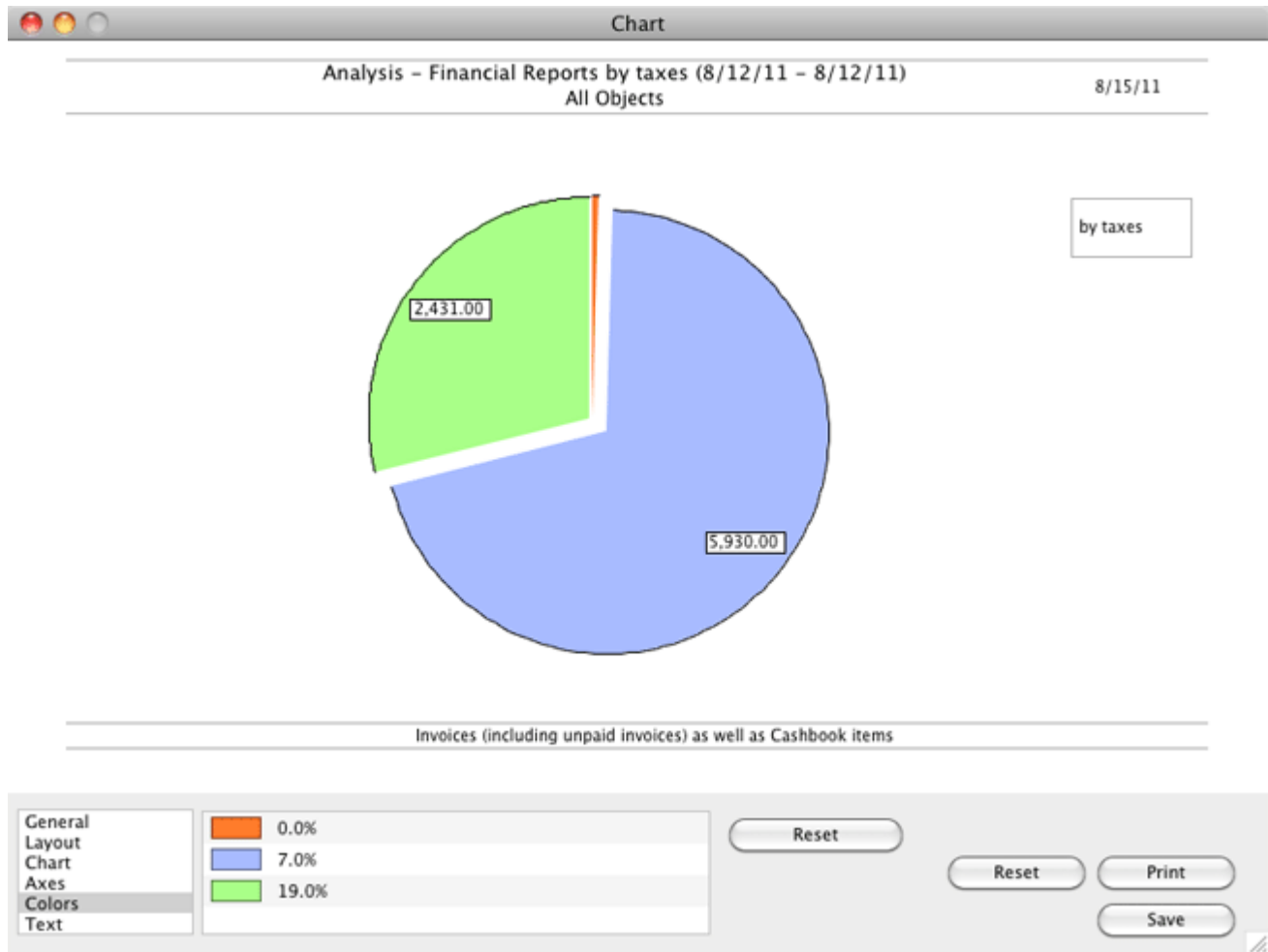
For this financial report, you can only select the pie chart.

Which extra created the biggest revenue?

You can also evaluate all the billed extras by clicking on **Extras**.

The extras will be structured the same way that you have structured them in the Extras Management. If you want to have more, less or different categories, you will have to add or delete them in Extras Management.

Charts for the extras

You can generate a chart for the extras as well.
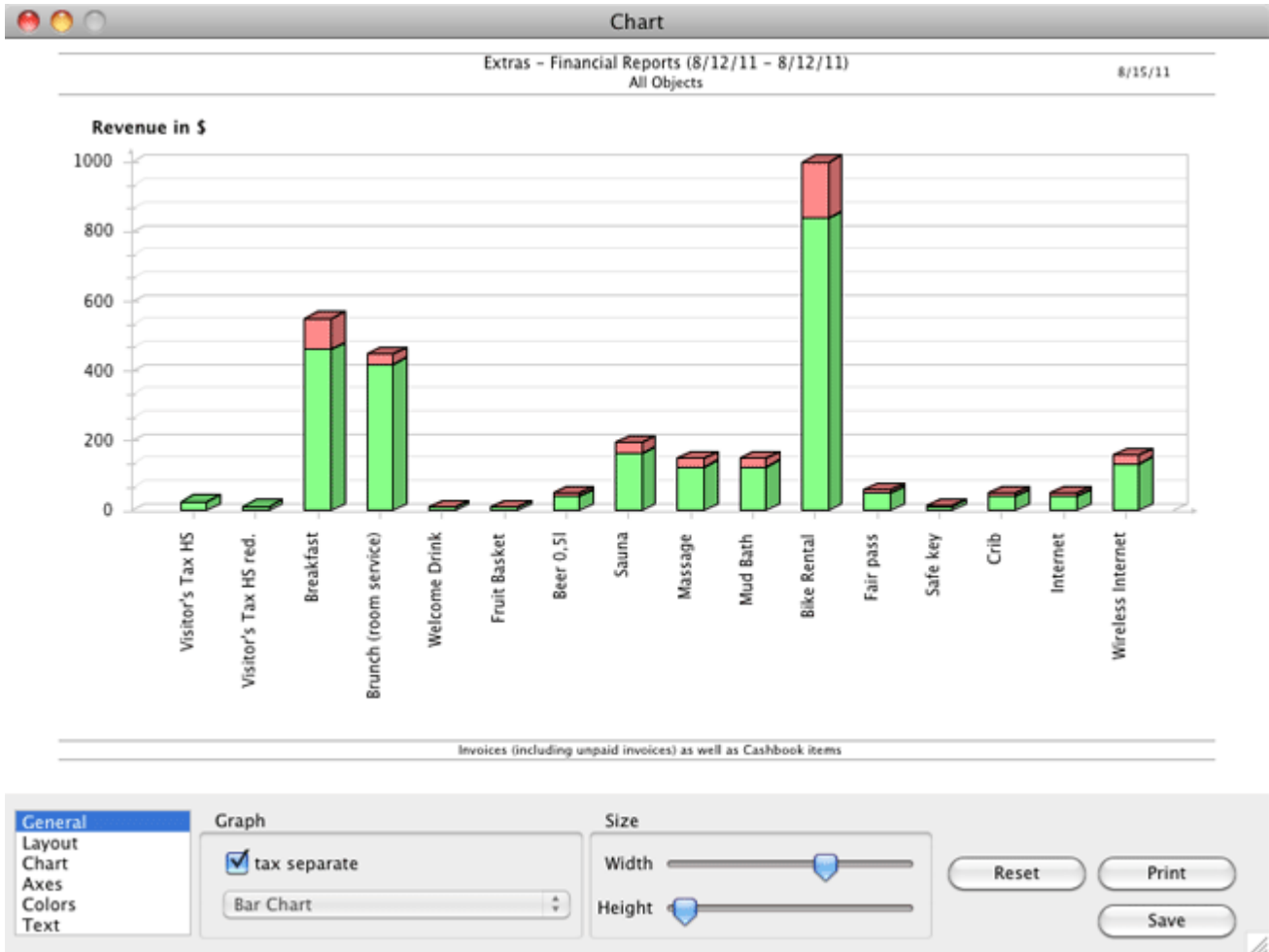
The charts offer several options so that you can customise them:

For this report you can decide whether you want to show the tax amount separate. If you want it separate, you can choose between a bar and pie chart; if you choose to show it separately, you can only select the pie chart.

CASHBOOK ARCHIVES   UP   AGENTS

Create, rename and delete agents and their commission

In Lodgit Desk, you can create agents (people, companies, etc.) that have sent guests to you and therefor deserve a commission. You can then view an analysis of the revenue that those agents have created for you (including the commission percentage and the amount you have to pay them).

To add a new agent you can use the Agent Management which can be found by going to **Administration > Agent Commission**.

To **add a new agent** click on the plus symbol in the list. This will let you create a new entry.

To **rename an existing agent** double-click on their name.

To **delete an agent** press the minus symbol at the far left of the list entry. If there is a lock symbol instead of the minus, the agent cannot be deleted because they are linked to bookings.

Please add a percentage for each agent because otherwise it's not possible for Lodgit Desk to calculate their commission. You can view the Agent Statistics to see the revenue created by agents, their commission and the number of bookings they have brought to you.

> **Note:**
> *The Online Booking System has already been added as an agent. It will be used to analyse all bookings that came in through the Online Booking System.*

FINANCIAL REPORTS   UP   LISTS

Lists

Lodgit Desk offers you several lists and statistics for your personal use:

Country Report
- monthly analysis of the overnight stays, sorted by the countries of the guests

Cleaning List
- daily updated cleaning list for you to print and give to your cleaning staff

Guest List
- list of all guests in your establishment over a certain time frame that can be printed

Check In List
- list of all arriving guests in a certain time frame that can be printed

Check Out List
- list of all departing guests in a certain time frame that can be printed

Vacancy List
- list of all vacant units during a selected time frame

Lodging List
- analysis of the revenue generated by accommodation services for a certain time frame; can be filtered by objects; can be viewed as a graph

Extras List
- analysis of the revenue generated by extras for a certain time frame; can be filtered by objects

City Tax List
- list for the amount of city tax collected in the bookings

Agent List
- calculation of the revenue generated by bookings that came in through agents and therefore will call for a commission

Occupancy / Performance Indicators
- occupancy rate and revenue per available room (RevPar)

List of Deposits
- list of all deposits in the system

Accounting Export
- export of invoice data for import in accounting software

Country Report

Lodgit Desk helps you with the analysis of your accommodations based on the **home countries of the guests**. This will make it much easier to report the statistics because the **official country codes** are used and you can use these reports to pass on to your statistical office. The analysis not only lists overnight stays but also arrivals and departures.

This window will open if you go to **Lists > Country Report** in your menu bar. In the drop down menu "Time Frame" you can select months, quarters, six-month-periods or even entire years for this report.

In this window you also have the option to show the statistic for only one object instead of all of them by selecting the object in the drop down menu.

By clicking the button **Room Nights** you will be forwarded to the Occupancy / Performance Indicators window. There you'll find the number of room nights for the time frame selected in the country report (nights*units).

> *Note:*
> *You can **show or hide certain groups**, by pressing the arrow button next to it. Hidden groups will not be used for the statistic and will not be shown on a printout.*

L<small>ISTS</small>   U<small>P</small>   C<small>LEANING</small> L<small>IST</small>

Cleaning List

Lodgit Desk provides you with a daily cleaning list that you can print and then give to your cleaning staff for reference.

You can generate the cleaning list for each object individually by selecting an object from the drop down menu instead of using "All Objects". You can also select a date, week or month and certain booking status to use.

The **cleaning status** can be set to **automatic cleaning intervals** in Lodgit Desk. You can specify the cleaning interval individually for each rentable unit in the Object Management.

> *Note:*
> *The basis for the cleaning list are the bookings within the reservation schedule and the cleaning interval set in the Object Management. **By default**, units that **don't need to be cleaned** (because they are vacant or are currently on an "off" day) **will not be shown in this list.** You can manually display them, by selecting **Vacant Units** or **Units that don't need to be cleaned** in the "Booking Status" drop down menu.*

If the list is generated for a single day, **details** such as guest name, cleaning notes or arrival and departure **can be shown or hidden**. That way, you can decide for yourself, which information is necessary for your cleaning personnel. The number of guests is adjusted according the bookings in the reservation schedule. The only units listed are the ones that need to be cleaned according to the automatic schedule.
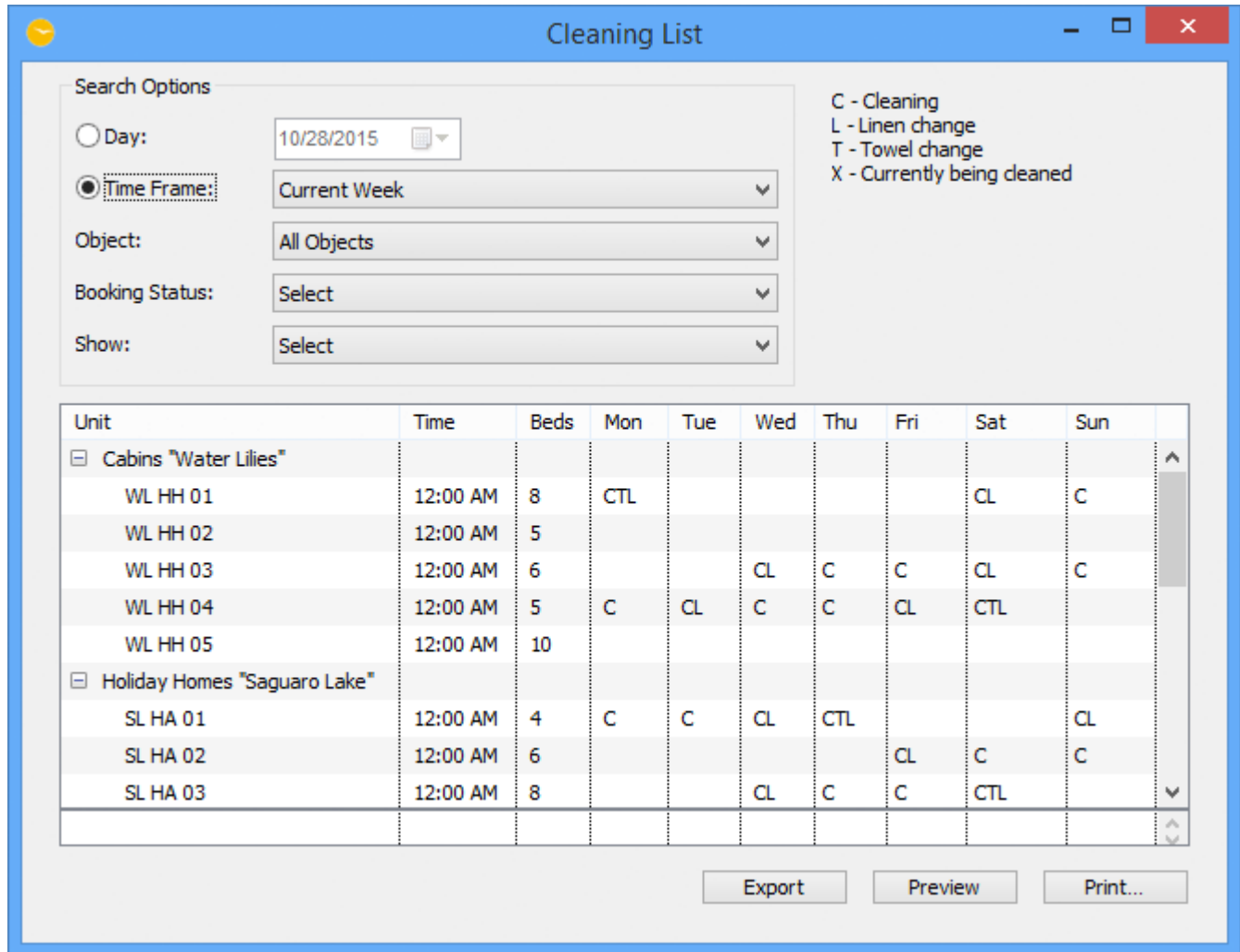
When the list is generated for a time frame (e.g. this week), no details will be printed out. Only rentable unit, cleaning time, number of beds of the unit and the type of cleaning are listed.

You can print this list by pressing the **Print** button. You can also **Export** the list as an Excel file and then save it on your computer. That file can then be edited by software such as Microsoft Excel 2007 and newer (Windows), iWorks Numbers (Macintosh) or OpenOffice (Windows, Macintosh).

After all rentable units have been cleaned you can change the cleaning status of each unit individually (or of all units in one object) in the reservation schedule by using the context menu of the cleaning column (right-click).
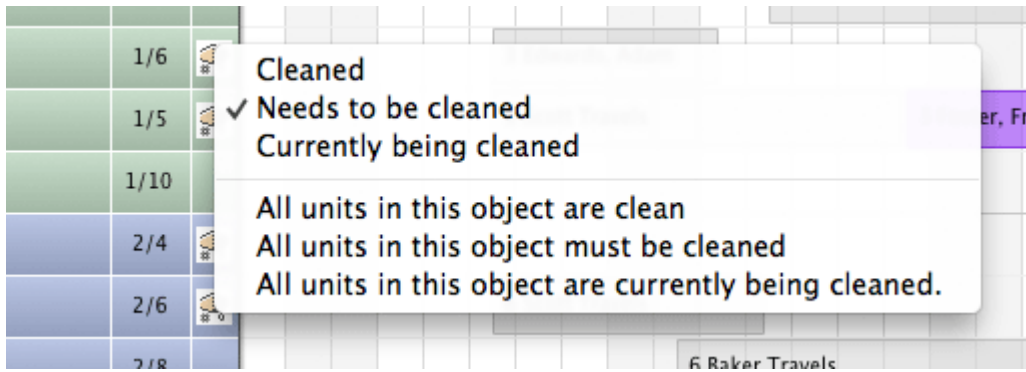
Note:
Double-clicking on an entry in the cleaning list will open the notes area of the booking window for this entry where you can enter information for your cleaning staff, such as "no down pillows". You can also use the context menu to open that notes area.

COUNTRY REPORT   UP   GUEST LIST

Guest list

Lists > Guest List. This list shows you all the guests in your establishment during a specified time frame. You can filter the list by only selecting one object or certain booking status. You can also only list guests that you have previously sorted into one of your lists in the guest management or enter the number of an individual group booking to show only it's members.
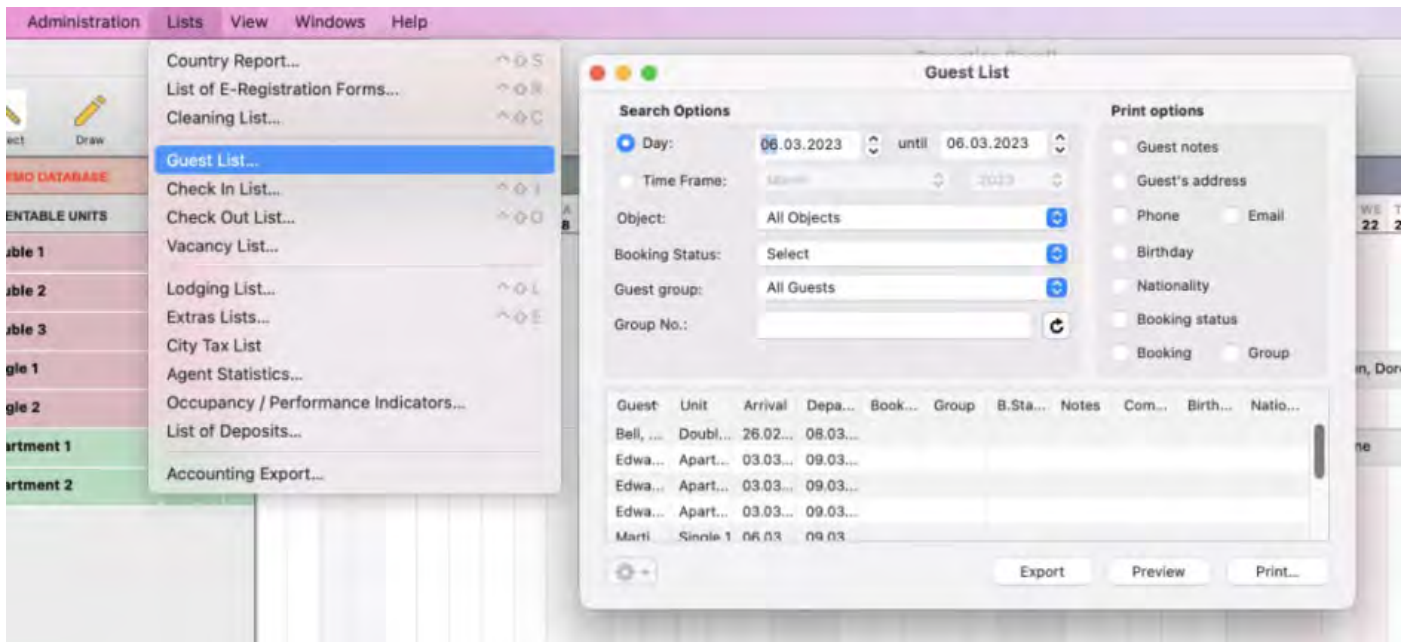
You can sort the list by clicking on the column headers.

You can print this list by pressing the Print button. You can also Export the list as an Excel or CSV file and then save it on your computer. That file can then be edited by software such as Excel, Numbers or Open/LibreOffice.

C<small>LEANING</small> L<small>IST</small>   U<small>P</small>   C<small>HECK</small> I<small>N</small> L<small>IST</small>

Check In List

In Lodgit Desk you can get a detailed evaluation of all arriving guests for a certain period using the check-in list. For individual bookings, you can create registration forms by right-clicking. In addition, you can send e-mails and serial letters to several guests as well as print and export the list.

1. Go to **Lists > Check In List** in the menu bar. This will open the window Check In List.

2. Select the time frame for which you want to do the analysis. You have two options on how to do that:

   - The **free time frame**, that you can define over the starting and ending date using the two calendars and
   - the limited time frame that you can define using the drop down menu and selecting a **month, quarter, six-month-period** or **year**.

3. On the right side you can decide whether the following additional information will be printed or not.

   - Companions (all guest names entered in the booking; if unchecked, only the invoice recipient will be listed).
   - Guest notes (all notes of the guest from the Guest Management)
   - Booking notes (all notes added in the booking window)
   - Extras (all extras booked by the guest)

   Note:
   If you have organised your extras in groups in the Extras Management, you can select and analyse these as a group!

4. You can also restrict the analysis to only one object by selecting it in the crop down menu.

5. You can also restrict the analysis to certain booking status by selecting them in the drop down menu.

6. You can print this list by pressing the **Print** button. You can also **Export** the list as an Excel file and then save it on your computer.

Guest List   Up   Check Out List

Check Out List

In Lodgit Desk you can get a detailed evaluation of all departing guests for a certain period using the check-out list. For individual bookings, you can create registration forms by right-clicking. In addition, you can send e-mails and serial letters to several guests as well as print and export the list.

1. Go to **Lists > Check Out List** in the menu bar. This will open the window Check Out List.

2. Select the time frame for which you want to do the analysis. You have two options on how to do that:

   - The **free time frame**, that you can define over the starting and ending date using the two calendars and
   - the limited time frame that you can define using the drop down menu and selecting a **month, quarter, six-month-period** or **year**.

3. On the right side you can decide whether the following additional information will be printed or not.

   - Companions (all guest names entered in the booking; if unchecked, only the

    invoice recipient will be listed).
- Guest notes (all notes of the guest from the Guest Management)
- Booking notes (all notes added in the booking window)
- Extras (all extras booked by the guest)

> ### *Note:*
> *If you have organised your extras in groups in the Extras Management, you can select and analyse these as a group!*

4. You can also restrict the analysis to only one object by selecting it in the crop down menu.

5. You can also restrict the analysis to certain booking status by selecting them in the drop down menu.

6. You can print this list by pressing the **Print** button. You can also **Export** the list as an Excel file and then save it on your computer.

       CHECK IN LIST   UP   VACANCY LIST

Vacancy List

You can easily find vacancies in a certain time frame using the vacancy list. You can find this window by going to **Lists > Vacancy List**.

If you have selected the option **Occupancy Status**, you will be shown the vacant and the occupied units during the selected time frame. Optionally, the list can show the number of beds and the short description of the rentable units.

The option **Vacancies** shows you all rentable units including the dates that they are vacant.

The option **Occupied Time Frames** shows you all rentable units with the dates that they are occupied during the time frame you have selected.

Number of Guests lists all arriving, departing and in-house guests for ever day during the time frame you have selected.

The **Occupancy** is a simple list that tells you how many units of the categories are vacant or occupied, depending on which option you selected.

These lists can be printed or exported as CSV files.

CHECK OUT LIST   UP   LODGING LIST

Lodging List = revenue prognosis

The lodging list helps you analyse the revenue and the expected future revenue of your accommodation services by creating a list with the calculations for a certain time frame that you can then print. If a booking's revenue is being taken into account depends on whether or not the booking lies within the time frame you have specified.

The analysis does not make a difference between bookings that have already been billed and bookings that have not. All accommodation services are analysed for every single day. You have the option to filter the analysis for certain booking status.

> ### Note:
> *If you only want to analyse the revenue that has already been billed, go to* **Administration > Financial Reports***.*

You can also use this list to easily compare the accommodation revenue of a month to the previous year or the current quarter to the last one.

1. Go to **Lists > Lodging List** which will open the window for the lodging list.

2. Select the time frame for which you want to do the analysis. You have two options on how to do that:

   - The **free time frame**, that you can define over the starting and ending date using the two calendars and
   - the limited time frame that you can define using the drop down menu and selecting a **month, quarter, six-month-period** or **year**.

3. You can filter this list and only analyse a certain object by selecting it in the drop down menu.

4. You can also restrict the analysis to certain booking status by selecting them in the drop down menu.

5. You can print this list by pressing the **Print** button. You can also **Export** the list as an Excel file and then save it on your computer. That file can then be edited by software such as Microsoft Excel 2007 and newer (Windows), iWorks Numbers (Macintosh) or OpenOffice (Windows, Macintosh).

Charts for Lodging

You can generate a chart for this analysis by clicking on the button **Chart**.

Vacancy List   Up   Extras List

Extras List for visitor's tax, food & drink etc.

The extras list helps you analyse the revenue and the expected future revenue by creating a list with the calculations for a certain time frame that you can then print. If a booking's revenue is being taken into account depends on whether or not the booking lies within the time frame you have specified.

The analysis does not make a difference between bookings that have already been billed and bookings that have not. All extras are analysed for every single day. You have the option to filter the analysis for certain booking status.

You can use this list for your kitchen staff to know how many breakfasts and dinners are booked for one day or to find out how much visitor's tax you collected last month.

You can also use this list to easily compare the extras revenue of a month to the previous year or the current quarter to the last one.

1. Go to **Lists > Extras List** which will open the window for the extras.

2. Select the time frame for which you want to do the analysis. You have two options on how to do that:

  - The **free time frame**, that you can define over the starting and ending date using the two calendars and
  - the limited time frame that you can define using the drop down menu and

selecting a **month, quarter, six-month-period** or **year**.

3. In the drop down menu on the right side you can select the **Extra** that you want to analyse. If you didn't select one, all extras will be analysed.

> *Note:*
> *If you have organised your extras into groups in the Extras Management, you now select these groups and analyse them!*

4. You can also restrict the analysis to only one object by selecting it in the crop down menu.

5. You can also restrict the analysis to certain booking status by selecting them in the drop down menu.

6. You can print this list by pressing the **Print** button. You can also **Export** the list as an Excel file and then save it on your computer. That file can then be edited by software such as Microsoft Excel 2007 and newer (Windows), iWorks Numbers (Macintosh) or OpenOffice (Windows, Macintosh).

Charts for extras

You can generate a chart for this analysis by clicking on the button **Chart**.

LODGING LIST   UP   CITY TAX LIST

City Tax List

When you go to **Lists > City Tax List**, you'll find an analysis of all the city tax (bed tax, accommodation tax) you have collected as per your bookings.

Please note:
This list only shows the city tax calculated using the designated feature. For visitor's taxes that were added as extra items, please see the Extras List.

The list is based on **bookings in the reservation schedule**. It does not matter whether the bookings have been invoiced or not.

In the list, you can see the bookings, their main contacts, how many guests and how long they stayed, the name and calculation rules for the tax as well as the tax amount due.

You can filter this list by **objects** and/or **booking statuses**.

Agent List

Lodgit Desk can compile a list of all bookings that have come in through an agent during a certain time frame. It will list the bookings, the revenue generated by those bookings, the commission rate and the commission amount you owe the agent. This list can be printed.

1. In the menu bar, go to **Lists > Agent List**. This will open the Agent Statistics.

2. In the drop down menu, select the time frame for the bookings you want to be shown. You can select **months, quarters, six-month-periods and years**. And you can choose if you want to sort the list by arrival or departure dates of the bookings.

3. In the drop down menu on the right you can filter the list by only showing bookings of a selected object or selected income types (accommodations and/or extras).

The **Comparison** shows the number of bookings for each agent, the revenue generated by those bookings, the commission percentage and the commission amount you will have to pay your agent for these bookings.

In the **Details** area, you can view every single booking for each agent during the specified time frame. Double-clicking on a list item will open the booking window for the booking selected.

CITY TAX LIST   UP   OCCUPANCY / PERFORMANCE INDICATORS

Occupancy / Performance Indicators

In Lodgit Desk, you can display the occupancy rate for a certain period of time and calculate and graphically display the revenue per room (RevPar).

You can set the time period in two different ways: first, you can set it manually using the two calendar fields, and second, you can select a month, half-year, quarter, or whole year using the drop-down menu below.

Other criteria according to which you can display the list are objects (either all or only one) and booking states (all or only selected).

Click on the **Print** button to print the list. You can also **export** and save the list as an Excel spreadsheet. The table can then be further edited with programs such as Microsoft Excel (Windows), Numbers (macOS) or OpenOffice (Windows, macOS).

Occupancy

Under **Lists > Utilisation and Key Figures > Utilisation**, the bed utilisation for the selected period is displayed.

This occupancy rate is calculated individually for each rental unit in the specified period:

Unit	Overnight Stays	Evaluated Overnight Stays	Capacity	Occupancy Rate in %
DZ C	27	27	60	45,00
EZ A	49	30	30	100,00
EZ B/DZ A	35	35	60	58,33
EZ C/DZ B	31	27	30	90,00
Ferienhaus Entspannung	81	81	120	67,50
Ferienwohnung 1	43	43	60	71,67
Ferienwohnung 2	28	28	120	23,33
WB 01	75	75	300	25,00
WB 02	127	127	300	42,33
WB 03	130	130	300	43,33
Σ	626	603	1380	43,70

Overnight Stays: The sum of your actually recorded overnight stays including the nights achieved by means of over-bookings.
Evaluated Overnight Stays: Number of overnight stays up to the maximum occupancy rate of the rental unit, as defined in the settings for the rental unit.

Capacity: The maximum utilisation of the rental unit, from the settings for the rental unit.

Occupancy rate in %: Number of evaluated overnight stays divided by Capacity. This value can be more than 100% if you take over-bookings into account during the calculation.

You can display the occupancy rate graphically in a diagram.

Performance Indicators

If you click on the tab **performance indicators**, you can display the occupied guest room days, the average lodging revenue, the occupancy rate, the average room price as well as the RevPar (logistics revenue per room) for your objects and the selected period. You can also display this evaluation graphically.

Object	Nights*Units	Capacity	Room Revenue	Occupancy in %	ADR in €	RevPAR in €
Pension "Sonnenschein"	113	120	6.347,66	94,17	56,17	52,90
Ferienwohnungen "Entspannung"	86	90	7.244,46	95,56	84,24	80,49
Ferienpark "Waldblick"	87	90	11.283,93	96,67	129,70	125,38
Σ		286	300	24.876,06	95,33	86,98	82,92
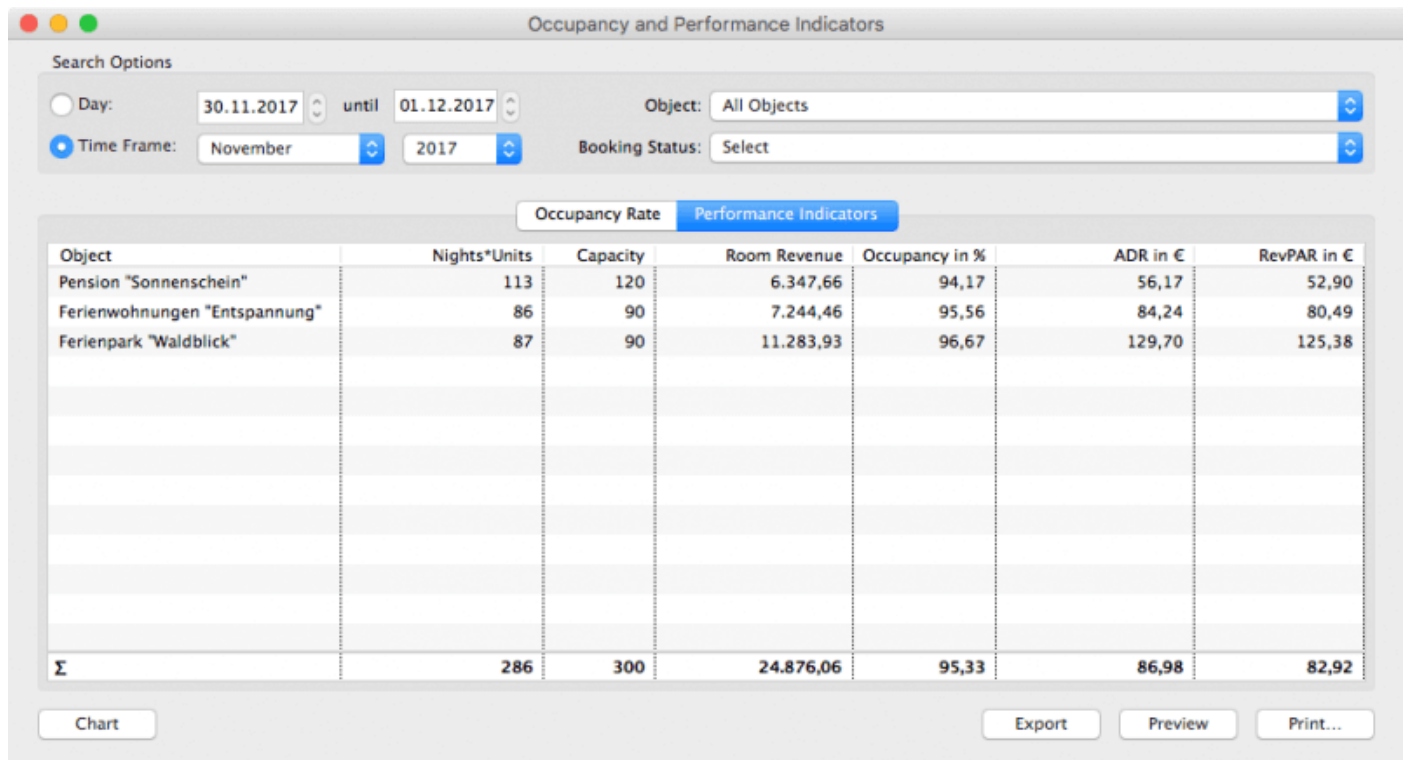
This data is determined per object.

In the diagram you can graphically display the utilisation of the objects, the average rate or the RevPar.

AGENT LIST   UP   LIST OF DEPOSITS

List of Deposits

Go to **Lists > List of Deposits** to find all the deposits you have entered in Lodgit Desk:

You can filter these in relation to their **due or receipt date** and sort them accordingly.

With the context or action menu you can also select a deposit and:

- open the corresponding booking,
- open the deposit invoice (if you created one),
- open the final invoice if you've already settled the booking.

OCCUPANCY / PERFORMANCE INDICATORS   UP   ACCOUNTING EXPORT

Accounting Export

Lodgit Desk lets you export all invoice information as CSV, XLSX or DATEV files, letting you import this information into your accounting software.

Important:

If you want to make use of the accounting export, you first have to add the account numbers for payment methods, extras, etc. within the Preferences and the Extras Management!

Navigate to the menu item **Lists > Accounting Export** to open the following window:
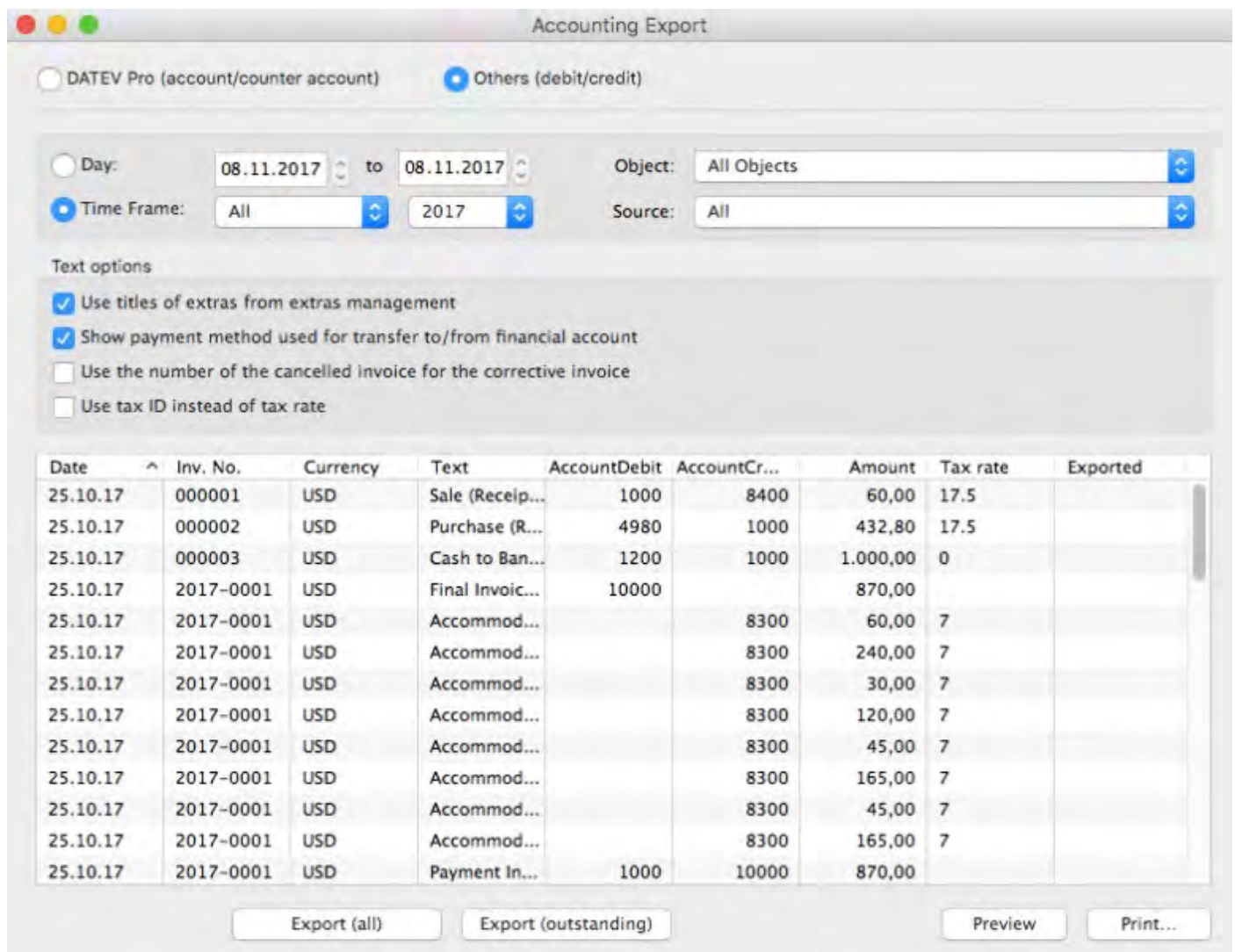
You can first select the type of export you want to be doing: Either a **DATEV Pro** export, which is specifically designed for the software DATEV Pro. Or a **debit/credit** export, which can be used in other bookkeeping software.

Now you will see the details for all invoices and receipts created in Lodgit Desk. As text options, you can choose whether you want to **use the extras titles from the extras management or the edited titles from the booking**, whether you want to

list the payment method used for payments made, whether you want to **use the number of the original ("corrected") invoice instead of the actual one for corrective invoices** and whether to **use the tax rate or tax ID**.

You can limit the list by selecting a certain timeframe and/or a single object. You can also select whether you want to see all revenue, or just revenue created from receipts or invoices.

The checkmark in the column **Exported** lets you know that these list items have already been exported. These will not be exported again if you click the **Export (outstanding)** button (recommended). Clicking **Export (all)** will export everything which is in the current view regardless of whether an item has or has not been exported already.

You can export the list into a CSV or XLSX file by pressing the button **Export**. First, select the location for the file and in the next window you can define the settings:

Please make sure that your selected settings are the same as the import settings of your accounting software.

If you're using DATEV:
Please note that your invoice and other numbers may only be 121 characters long in total. Change your numbering in settings if necessary.

LIST OF DEPOSITS   UP   ADDITIONAL MODULES

Additional Modules

The following additional modules can be used along with Lodgit Desk after they have been applied for and unlocked. In some cases using the modules requires a fee and/or another agreement.

Module	Description	Conditions
Channel Manager	This module allows you to connect to a channel manager to make your units available to online booking channels.	Unlocking this module costs a small monthly fee for each rentable unit you want to synchronise.
Database Server	Using the database server will allow several users within a network to use Lodgit Desk concurrently.	Unlocking this module costs a small monthly fee
Online Booking System	Automatically receive internet bookings, synchronise vacancy status, price information, online packages with the Lodgit Desk program, 2 ways of searching (single mode, category mode), easily integrate booking process into your website.	Part of the module "Online Systems"; unlocking costs a small monthly fee for each rentable unit (no commissions!)
Booking Calendar & Owner-Booking	View online booking calendar that's synchronised with the Lodgit Desk program; add online bookings yourself (Owner-Booking) and synchronise with Lodgit Desk automatically.	Part of the module "Online Systems"; unlocking costs a small monthly fee for each rentable unit (no commissions!)
Electronic Registration Systems	Connect Lodgit Desk to your municipality's electronic registration system. Currently supported systems: AVS, Feratel	Unlocking the module costs a small monthly fee
Hotel Locking System	Using electronic hotel locking systems Currently supported systems: Hotel Locking System SALTO	Unlocking the module for a one-time license fee
Cash Register Systems	Linking the Lodgit Desk program to an electronic cash register system to automatically add revenues to the program Currently supported interfaces: Standard (PROTEL-compatible), VECTRON, Gastware	Unlocking the module for a one-time license fee
Zip Code Database	Installation of a global zip code and state library into Lodgit Desk.	free; data provided by geonames.org
Review Portals	Connection to review portals	Unlocking the module costs a small monthly fee
Kassa Austria RKSV	Connection to the cbird EPOS in order to comply with Austrian RKSV laws	Monthly fee plus costs of hardware

GDPR Data Cleansing	Ability to delete data that does not necessarily have to remain stored in your Lodgit Desk database, e.g. for tax reasons	Free additional module - included in basic license

ACCOUNTING EXPORT   UP   SYNCHRONIZATION AND CHANNEL MANAGER

Additional Module: Synchronisation and Channel Manager

With the additional module "Synchronisation and Channel Manager" you can easily synchronise your vacancies with our optional online modules or one of the connected channel managers. You can also receive bookings through these channels, which are then automatically added and drawn into your database.

General settings for synchronisation
Settings for synchronizing with the Lodgit Online Booking System
Settings for synchronizing with channel manager CultSwitch
Settings for synchronizing with channel manager DIRS21
Settings for synchronizing with channel manager Hotel-Spider
Settings for synchronizing with channel manager MappingMaster
Settings for synchronizing with channel manager Siteminder
Frequently asked questions regarding channel managers

Comparison of features

	Lodgit	CultSwitch	DIRS21	HotelSpider	MM	SM
Receive bookings	✓	✓	✓	✓	✓	✓
Send availabilities	✓	✓	✓	✓	✓	✓
Send MinLOS	✓	✓	✓	-	✓	-
Send MaxLOS	✓	✓	-	-	✓	-
Send prices/rates	✓	✓	✓	-	✓	✓
Send extra items	✓	✓	✓*	-	✓	✓**
Limit arrival and departure to certain weekdays	✓	-	-	-	-	-
Block time frames	✓	-	-	-	-	-
Future timeframe updated in months (counting full months from current month as month number one)	24	24	24	12	24	12

* no mapping; a collective extra item is used
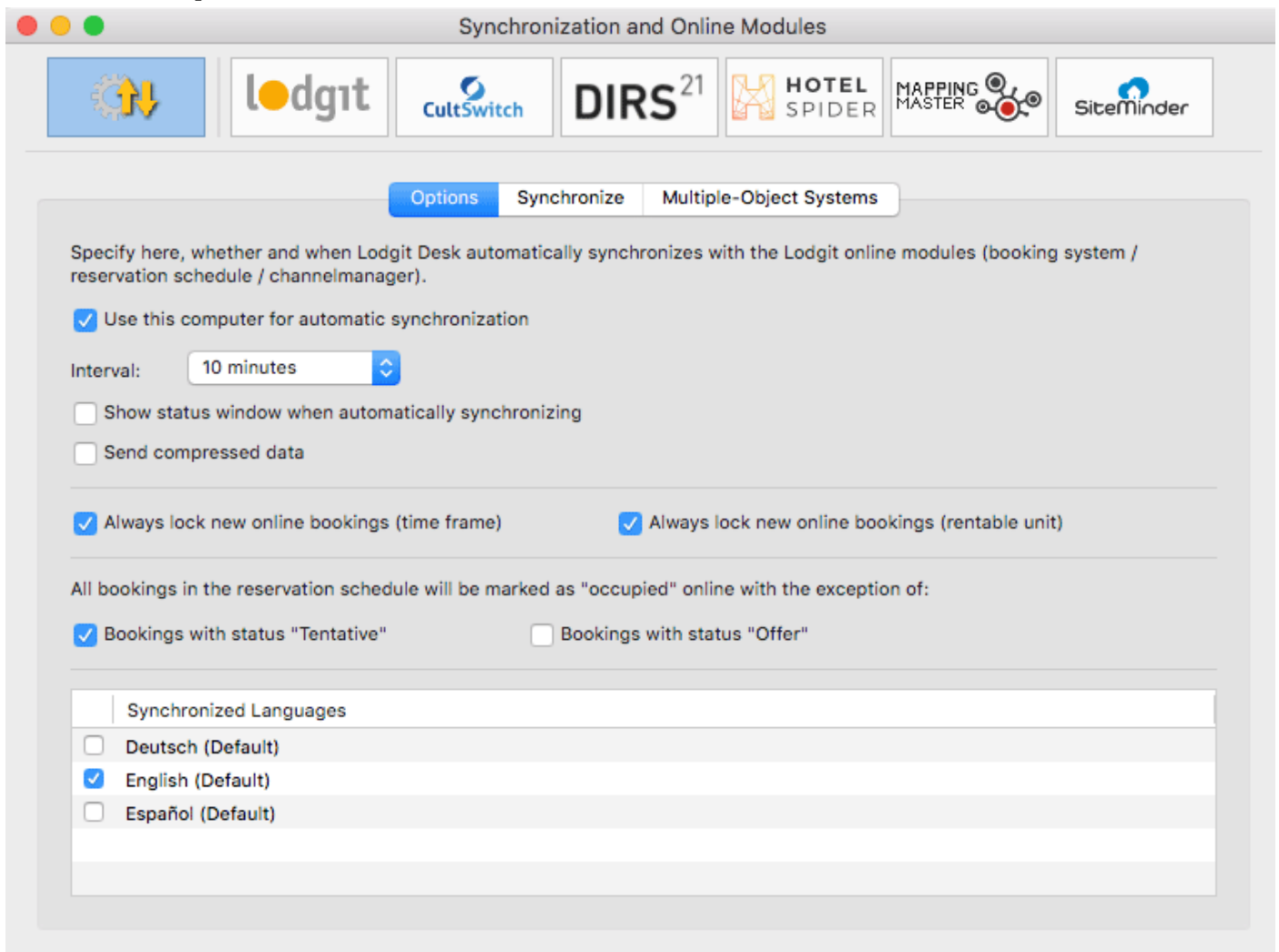
** limited to an extra selection provided by SiteMinder

ADDITIONAL MODULES   UP   GENERAL SETTINGS FOR SYNCHRONISATION

General settings for the synchronisation

If you are using the additional modules Online Booking System, Booking Calendar & Owner-Booking and/or Channel Manager, you have to perform synchronisations manually or automatically.

Go to **Administration > Synchronisation and Channel Manager** to define the general settings for synchronisation.

General options

1. You can activate **this computer for synchronising automatically**. When using the database server, you can then ensure that either all computers synchronise (always whichever computer comes first in the specified time frame) or only the computer(s) with the most stable internet access.
2. You can specify the **interval for the synchronisation**
3. You can also decide whether **you want to see a window pop up whenever Lodgit Desk is synchronising** with the online modules.
4. New online bookings are now **locked by default as soon as they're imported**. You have to manually unlock them to move them in the reservation schedule. Here you can turn that automatic lock off by unchecking the box.

5. Furthermore, you can decide, if you want **all bookings in your reservation schedule to be shown in the calendar as "occupied"**, or if you want certain bookings to be shown as "vacant" instead.
   Important: Bookings with the status **Checked Out** are generally considered "vacant" online.

6. Also, you have to check **at least one language** in your database that is to be synchronised.

Activate rentable units for synchronization

You can easily adjust which rentable units can be booked online in the tab "Synchronise". It is irrelevant whether these units will be synchronised with one or several online modules. Here, you'll also decide which of your objects should be combined into a multiple-object system.

Simply check the boxes for the units you want to synchronise in the upper list. With a **right click** or the **actions menu** you can quickly:

- synchronise / don't synchronise all units in this object
- synchronise / don't synchronise all units of that type in this object
- synchronise / don't synchronise all units of all objects

In the bottom list, you can combine objects into a multiple-object system. Select the system you've previously created through the grey arrows on the right. If left empty, this object will be synchronised as is.

> ### *Please note:*
> *Once combined into a multiple-object system, the objects will no longer be listed separately in the preferences for the channel managers. Only the multiple-object system will be listed.*

Multiple-Object Systems

Lodgit Desk allows you to combine different objects in Lodgit Desk into one system for the modules "Online Systems" and "Interface: Channel Manager". Within Lodgit Desk, these objects will still be handled separately (e.g. to create separate statistics), online they are treated as one object, though.

Add a multiple-object system in the list to the left. You'll have to define a few settings, such as **arrival and departure times** as well as **features**. These settings only concern the system online, not the objects in your backend.

SYNCHRONIZATION AND CHANNEL MANAGER   UP
SETTINGS FOR SYNCHRONIZING WITH THE LODGIT ONLINE BOOKING SYSTEM

Settings for the Lodgit Online Booking System

The Lodgit Desk Online Booking System allows you to set a minimum number of booked days for your online bookings or even allow only certain week days for arrivals and departures.

Go to **Administration > Synchronisation and Channel Manager** and go to the tab **Lodgit** to define these settings:

Minimum booking duration

Select the minimum booking duration in days as well as a time frame for when this doesn't apply anymore.

This way you can allow last minute bookers to stay less than the required minimum duration if the book only, e.g. 5 days in advance.

Example: Minimum booking duration 3 days. arrival only available on Mondays and Thursdays

Please note that these settings are object specific!

Arrival and departure days

Select the days for which arrival and departure are available. You can also define a time frame for when this setting doesn't apply anymore.
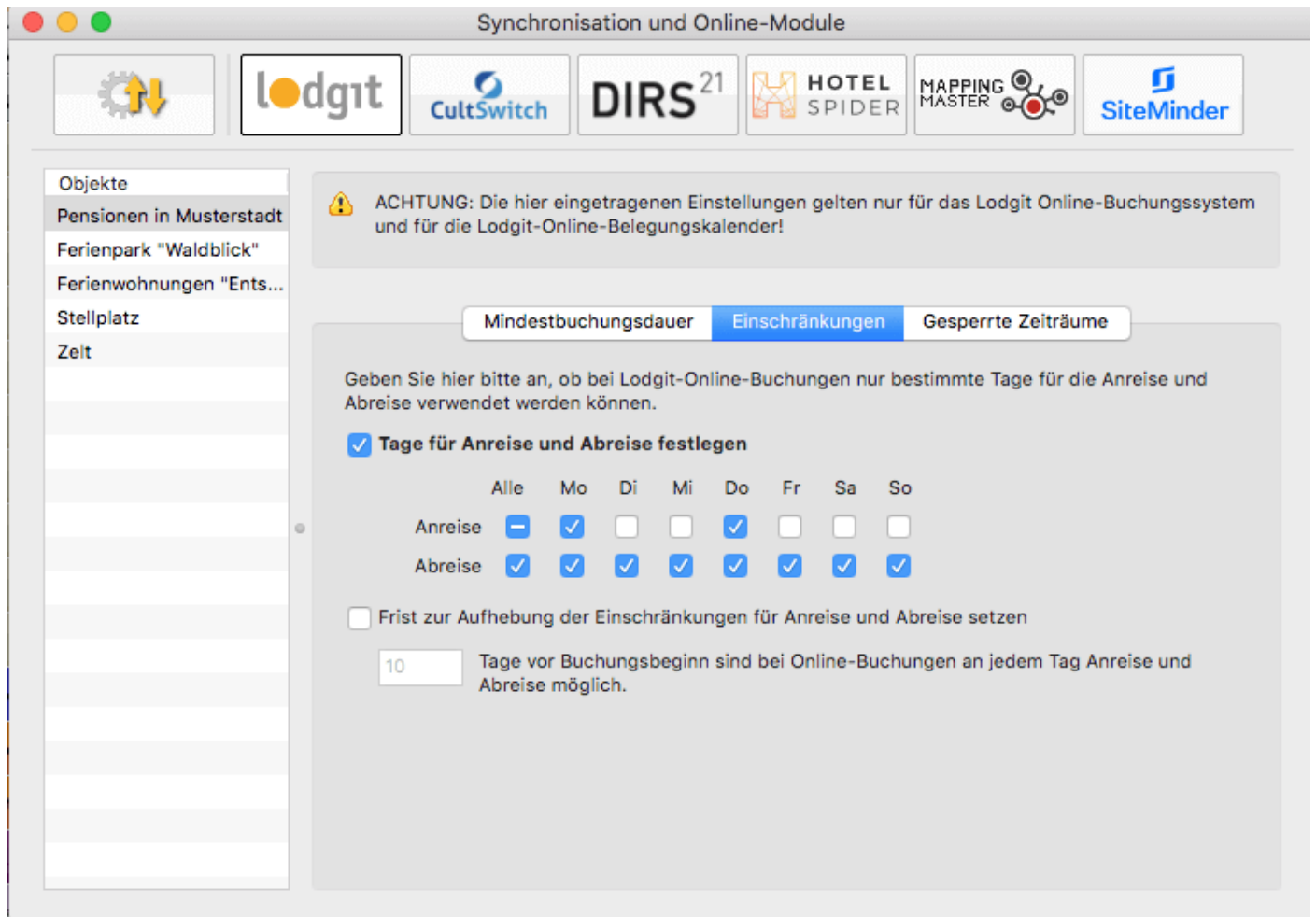
Example: Arrival only available on Mondays and Thursdays

Disabled (blocked) time frames

In the tab **Blocked Time Frames** you can set up certain times during which all or single units cannot be booked online through the Online Booking System (e.g. because you sold that allotment to an agent or are going on vacation yourself).

Units will be listed as occupied in the Booking Calendar online during that time.

GENERAL SETTINGS FOR SYNCHRONISATION   UP
SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER CULTSWITCH

Settings for synchronising with channel manager CultSwitch

The requirements

In order to use the channel manager CultSwitch with Lodgit Desk, you'll need:

- the module "Channel Manager Interface" from Lodgit, which you can order in our online shop at www.lodgit.com/shop
- an agreement with the channel manager CultSwitch. You can find a form listing their prices and terms in your Lodgit account at www.lodgit.com. Lodgit users will receive a special pricing as listed in the form.
- contracts and/or agreements with the internet booking channels that you can get on their respective websites.

  Got everything? Then we can get started!
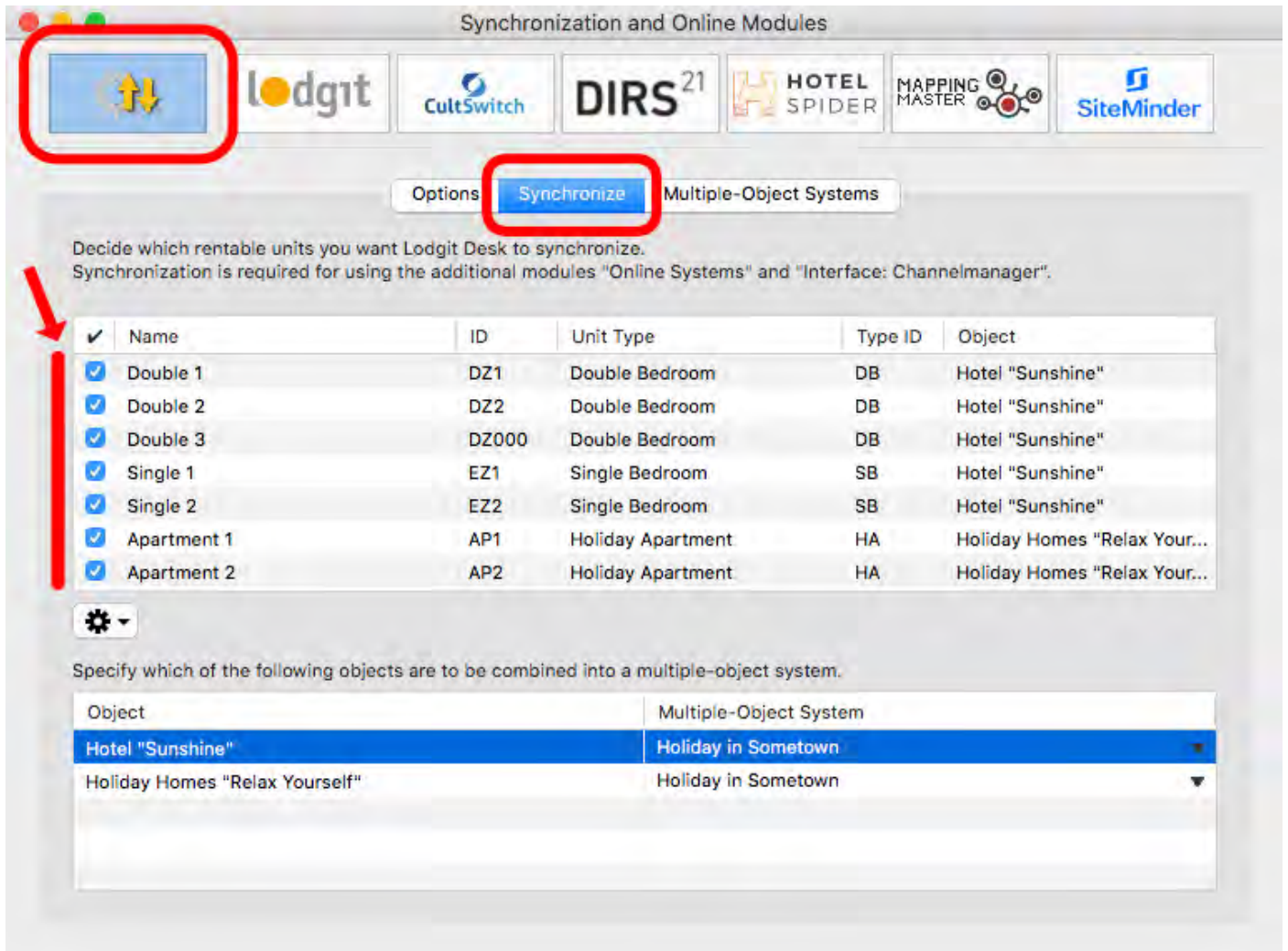
Please note: It is **not recommended** to put all your units online if you connect several units to one channel manager category (e.g. single bedrooms in Lodgit to category "Single" in channel manager). Leave at least 1 unit online, so you'll have some breathing room in the event of over-bookings.

Setting up your CultSwitch account

First, you'll have to set up the units or categories you want to offer in the OTAs in CultSwitch. For any questions about this process, the CultSwitch team will be happy to help.

Activate rentable units for synchronization

You can easily adjust which rentable units can be booked online in the tab "Synchronise". It is irrelevant whether these units will be synchronised with one or several online modules. Here, you'll also decide which of your objects should be combined into a multiple-object system.

Multiple-Object Systems

Lodgit Desk allows you to combine different objects in Lodgit Desk into one system for the modules "Online Systems" and "Interface: Channel Manager". Within Lodgit Desk, these objects will still be handled separately (e.g. to create separate statistics), online they are treated as one object, though.

Assign units in Lodgit Desk

After you have added the categories or units in CultSwitch, you can now assign them to the appropriate units in Lodgit Desk.

1. Open your Lodgit Desk installation and go to *Administration > Synchronisation and Online Modules* > CultSwitch. Select the object you want to connect to the channel manager:
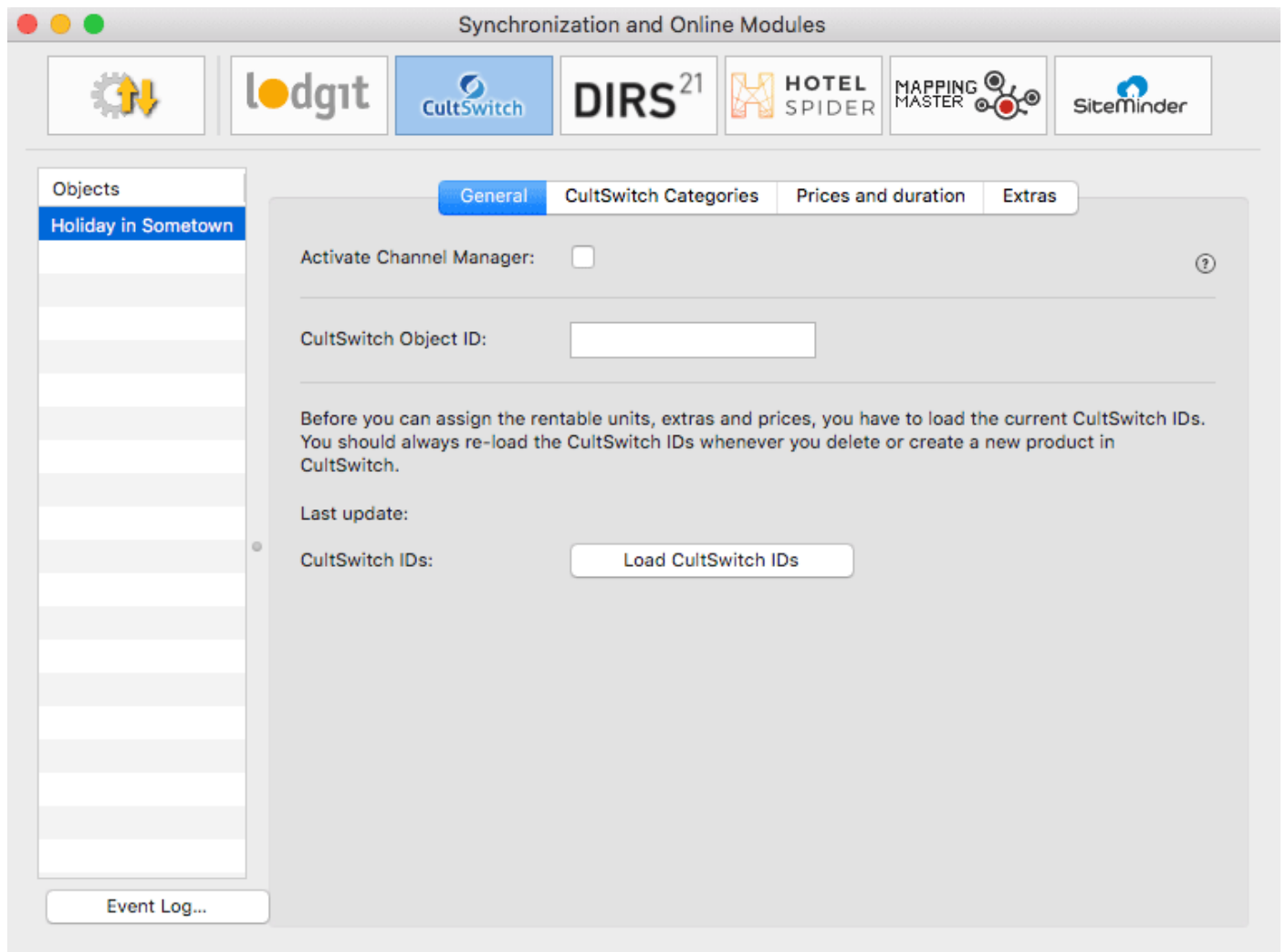
2. Enter your CultSwitch Object ID into the field and then press the button *Load CultSwitch IDs*.

Then, switch to the tab *CultSwitch Categories*.
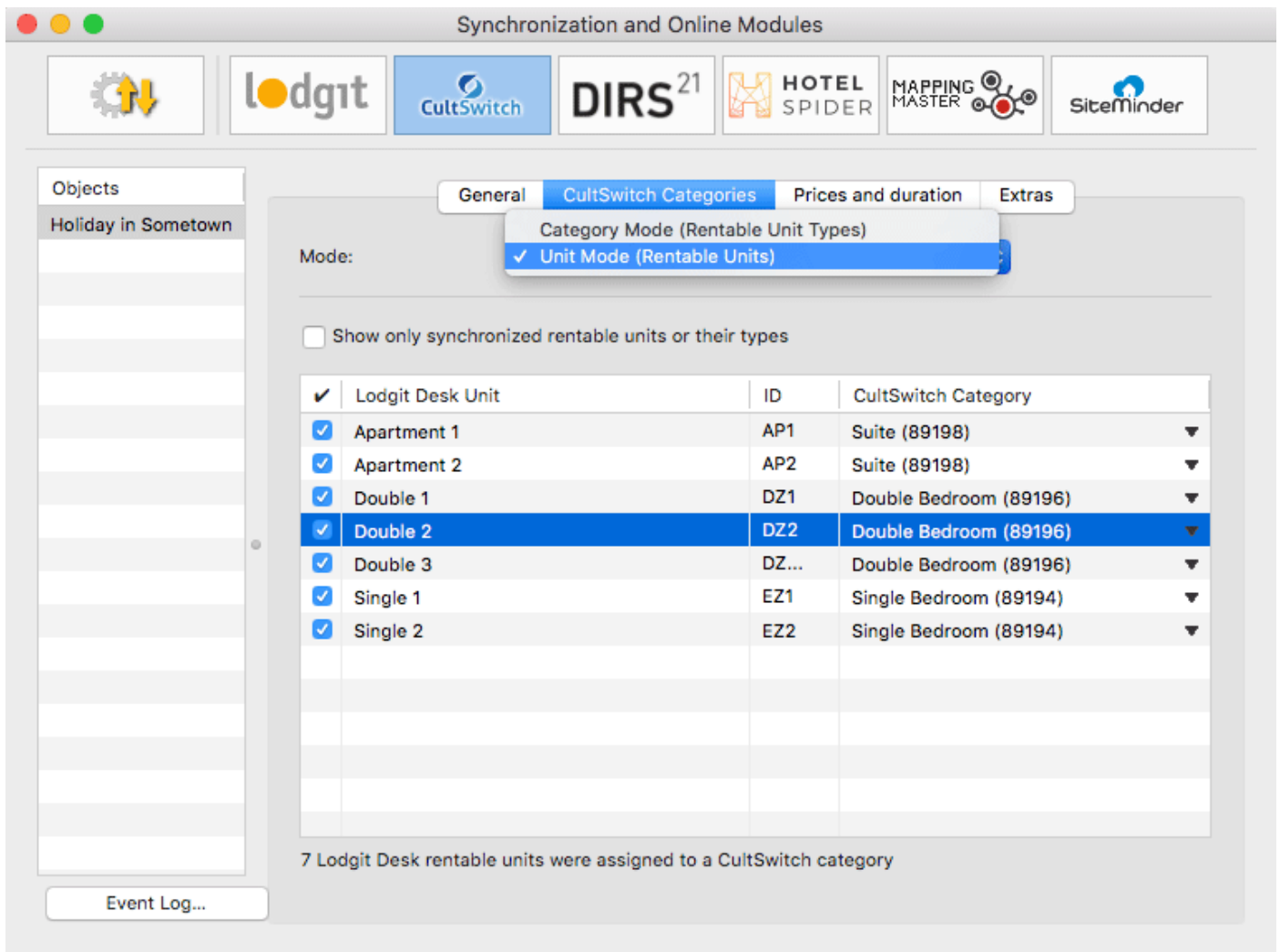
3. First, select the *Mode* (see red arrow). The *Category Mode* is suited best for accommodations with a lot of similar units, like a hotel. The *Unit Mode* is best suited for accommodations with very individual units, like a vacation home rental.

4. In the *left column* you'll find your units or unit categories, depending on which mode you've selected. In the *right column* you can choose which CultSwitch category corresponds to which.
Please note: Categories or units you don't want to synchronise with the channel manager can simply be deselected in the first column.

5. With that, you've already finished the basic setup. Test the connection by going to *File > Synchronise*. This will send your current availabilities of all selected units to the server and you can make sure the availabilities are listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in CultSwitch.

Manage prices from within Lodgit (optional)

As a CultSwitch premium partner, Lodgit can also send prices to the Channel Manager.

Important: You can manage the prices EITHER in Lodgit Desk OR in CultSwitch directly. Changes made to the prices in CultSwitch cannot be imported into Lodgit Desk.

1. Select your object in the window *Synchronisation and Online Modules > CultSwitch* and go to the *Prices* area. Check the field *Send prices to* CultSwitch:
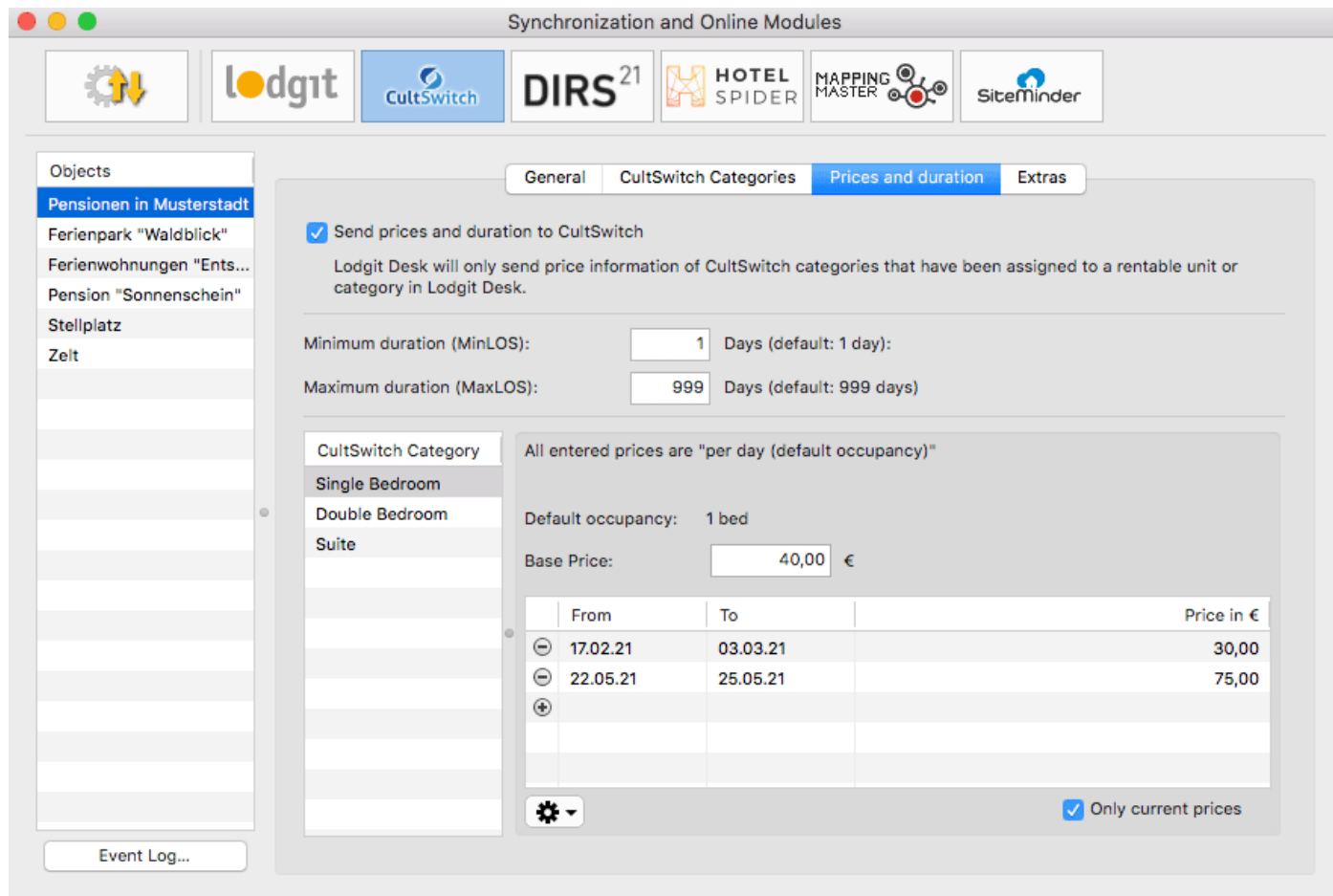
2. Select a CultSwitch category in the list and enter the base price. The base price is listed "per night" and default occupancy. It will always be used unless you've defined special prices for a time frame.

3. In the list underneath the base price, you can define time frames with different prices (e.g. seasonal prices). With the Actions menu you can import those price settings from your Price Management in Lodgit Desk.

4. You must add at least a base price for all categories! Test the connection by going to *File > Synchronise*. This will send your current prices of all selected units to the server and you can make sure the availabilities are listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in CultSwitch.

Link CultSwitch extras to Lodgit extras (optional)

CultSwitch lets you create extras ("Products") that you can link to the extras you have in Lodgit Desk. During the import of the bookings, the extras will then be selected and added to the booking correctly. That way, the bookings from CultSwitch

will fit seamlessly into your analysis for extra items and services.

1. Select your object in the window *Synchronisation and Online Modules > CultSwitch* and go to the *Extras* area. There you'll find a table listing all of CultSwitch' extras in the left column.
Should you not see any extras listed in this table, please go back to *General* and click the button "Load CultSwitch IDs".

2. In the column to the right, select the Lodgit extras you want to link to the CultSwitch extra item. Check the items that are going to be listed as 'inclusive' in the booking:

Link your Lodgit extras to the channel manager extras

3. Test the connection by going to *File > Synchronise*. This will send your current extras to the server and you can make sure everything is listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in CultSwitch.

General options

SETTINGS FOR SYNCHRONIZING WITH THE LODGIT ONLINE BOOKING SYSTEM   UP
SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER DIRS21

Settings for synchronising with channel manager DIRS21 channelswitch

The requirements

In order to use the channel manager DIRS21 channelswitch with Lodgit Desk, you'll need:

- **the module "Channel Manager Interface" from Lodgit**, which you can order in our online shop at www.lodgit.com/shop
- **an agreement with the channel manager channelswitch from DIRS21**. You can find a form listing their prices and terms in your Lodgit account at www.lodgit.com
- **contracts and/or agreements with the internet booking channels** that you can get on their respective websites.

Got everything? Then we can get started!

Setting up your DIRS21 channelswitch account

First, you'll have to set up the units or categories you want to offer in the OTAs in channelswitch. For any questions about this process, the DIRS21 team will be happy to help.

Activate rentable units for synchronization

You can easily adjust which rentable units can be booked online in the tab "Synchronise". It is irrelevant whether these units will be synchronised with one or several online modules. Here, you'll also decide which of your objects should be combined into a multiple-object system.

Multiple-Object Systems

Lodgit Desk allows you to combine different objects in Lodgit Desk into one system for the modules "Online Systems" and "Interface: Channel Manager". Within Lodgit Desk, these objects will still be handled separately (e.g. to create separate statistics), online they are treated as one object, though.

Assign units in Lodgit Desk

After you have added the categories or units in DIRS21, you can now assign them to the appropriate units in Lodgit Desk.

1. Open your Lodgit Desk installation and go to *Administration > Synchronisation and Online Modules > DIRS21*. Select the object you want to connect to the channel manager:
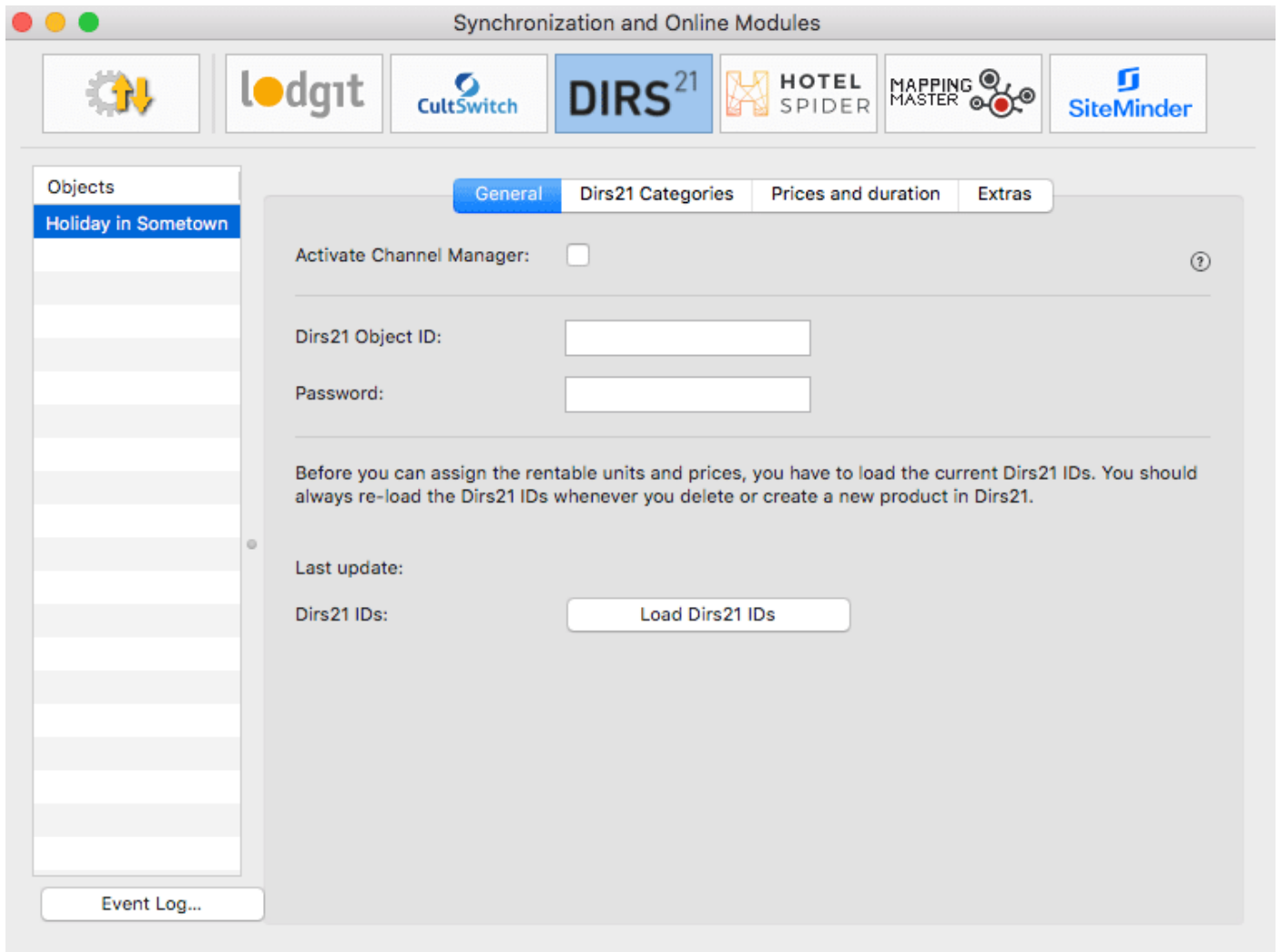
Enter your DIRS21 Object ID into the field and then press the button *Load DIRS21 IDs*.
Then, switch to the tab *DIRS21 Categories*.

2. First, select the *Mode*. The *Category Mode* is suited best for accommodations with a lot of similar units, like a hotel. The *Unit Mode* is best suited for accommodations with very individual units, like a vacation home rental.

3. In the *left column* you'll find your units or unit categories, depending on which mode you've selected. In the *right column* you can choose which DIRS21 category corresponds to which.
Please note: Categories or units you don't want to synchronise with the channel manager can simply be deselected in the first column.

4. With that, you've already finished the basic setup. Test the connection by going to *File > Synchronise*. This will send your current availabilities of all selected units to the server and you can make sure the availabilities are listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in DIRS21.

Manage prices from within Lodgit (optional)

Lodgit also allows you to manage your prices in the software and then send them to the Channel Manager.
Important: You can manage the prices EITHER in Lodgit Desk OR in DIRS21 directly. Changes made to the prices in DIRS21 cannot be imported into

Lodgit Desk.

1. Select your object in the window *Synchronisation and Online Modules > DIRS21* and go to the *Prices* area. Check the field *Send prices to DIRS21*:
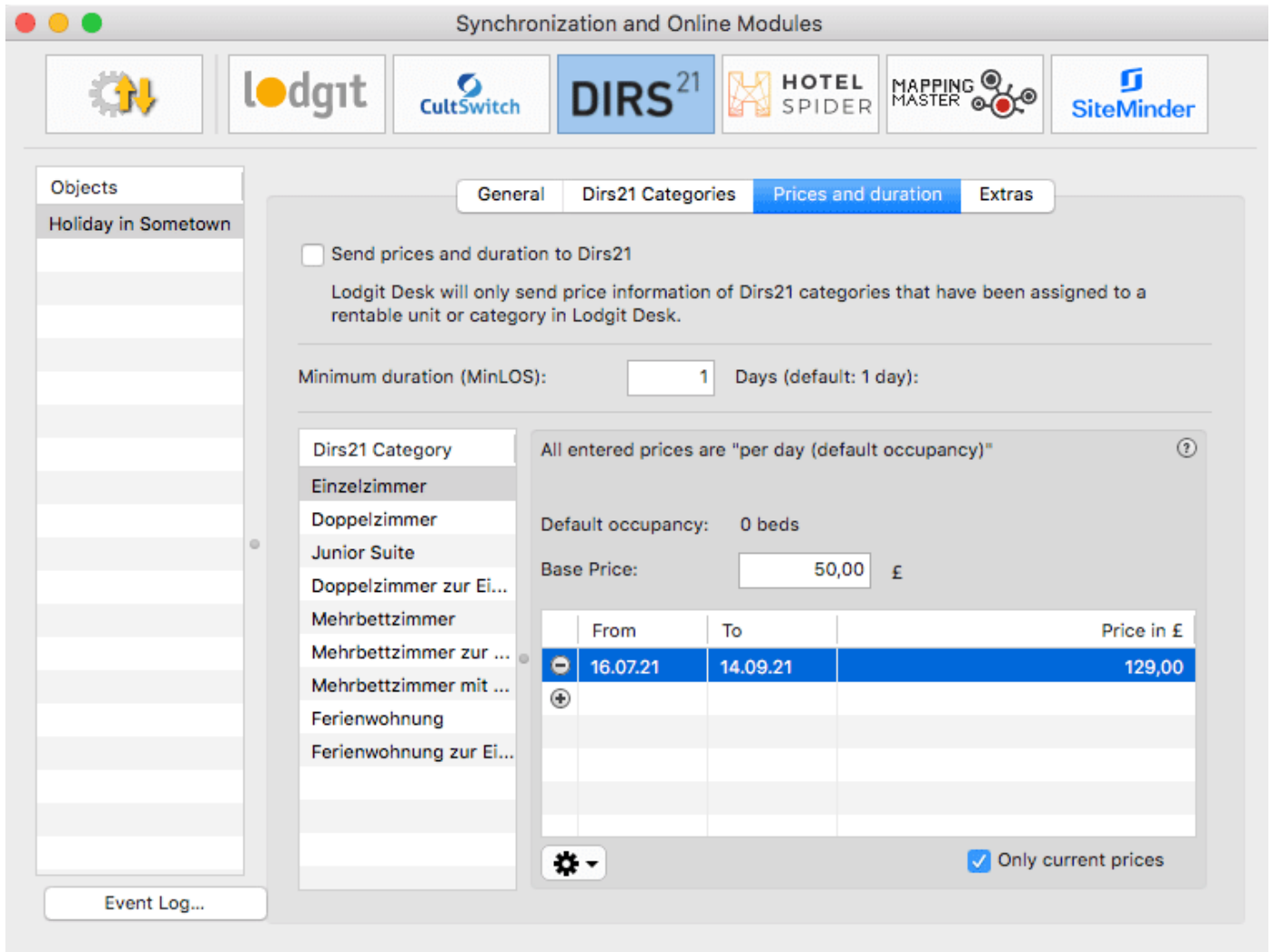
2. Select a DIRS21 category in the list and enter the base price. The base price is listed "per night" and default occupancy. It will always be used unless you've defined special prices for a time frame.

3. In the list underneath the base price, you can define time frames with different prices (e.g. seasonal prices). With the Actions menu you can import those price settings from your Price Management in Lodgit Desk.

4. You must add at least a base price for all categories! Test the connection by going to *File > Synchronise* and you can make sure the availabilities are listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in DIRS21.

Assign extra items and booking notes to Rate IDs

Please note: You need to know the IDs of your rates which you can enquire

with DIRS21

Select your object in the window *Synchronisation and Online Modules > DIRS21* and go to the *Extras* area. Enter a rate ID in the table at the left and then select the corresponding extra item(s) in the table at the right. You can also specify…

- if the price of the extra item is already included in the price transmitted by DIRS21 or if it is a surcharge that needs to be added on top of it (Price interpretation: Inclusive / Additional charge)
- if the extra item is supposed to be cleared with the accommodation (Marker Surcharge) or if the extra item is supped to be a separate item on the invoice.
- if a note should be added to bookings with this rate ID

Rates dependent on occupancy (optional)

To use rates dependent on occupancy with DIRS21, you have to create special room type (Zimmertyp) in your DIRS21 Account and then link it to one of your existing room types. This link is enabled on the DIRS21 website.

- Log into your account on DIRS21-office and navigate to your existing room types (Stammdaten > Zimmertypen).
- Create a new room type (Button „Neu" on the right hand side above the list).
- Enter the occupancy (Belegung) for which the new rate shall apply in

the tab „Allgemein".
- ◦ In the tab „Vererbung" you have to select the room type which will be occupied by the new rate.
- ◦ In the tab „Hotelsoftware" you have to enter the ID of your linked room type so Lodgit Desk knows which rooms to assign bookings created with the new rate.

General options

SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER CULTSWITCH   UP
SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER HOTEL-SPIDER

Settings for synchronising with channel manager HotelSpider

The requirements

In order to use the channel manager DIRS21 channelswitch with Lodgit Desk, you'll need:

- **the module "Channel Manager Interface" from Lodgit**, which you can order in our online shop at www.lodgit.com/shop
- **an agreement with the channel manager Hotel-Spider**. You can find a form listing their prices and terms in your Lodgit account at www.lodgit.com
- **contracts and/or agreements with the internet booking channels** that you can get on their respective websites.

Got everything? Then we can get started!

Activate rentable units for synchronization

You can easily adjust which rentable units can be booked online in the tab "Synchronise". It is irrelevant whether these units will be synchronised with one or several online modules. Here, you'll also decide which of your objects should be combined into a multiple-object system.

Simply check the boxes for the units you want to synchronise in the upper list. With a **right click** or the **actions menu** you can quickly:

- synchronise / don't synchronise all units in this object
- synchronise / don't synchronise all units of that type in this object
- synchronise / don't synchronise all units of all objects

In the bottom list, you can combine objects into a multiple-object system. Select the system you've previously created through the grey arrows on the right. If left empty, this object will be synchronised as is.

> *Please note:*
> *Once combined into a multiple-object system, the objects will no longer be listed separately in the preferences for the channel managers. Only the multiple-object system will be listed.*

Multiple-Object Systems

Lodgit Desk allows you to combine different objects in Lodgit Desk into one system for the modules "Online Systems" and "Interface: Channel Manager". Within Lodgit Desk, these objects will still be handled separately (e.g. to create separate statistics), online they are treated as one object, though.

Add a multiple-object system in the list to the left. You'll have to define a few settings, such as **arrival and departure times** as well as **features**. These settings only concern the system online, not the objects in your backend.

Assign units in Lodgit Desk

After you have added the categories or units in HotelSpider, you can now assign them to the appropriate units in Lodgit Desk.

1. Open your Lodgit Desk installation and go to *Administration > Synchronisation and Online Modules > HotelSpider*. Select the object you want to connect to the channel manager:
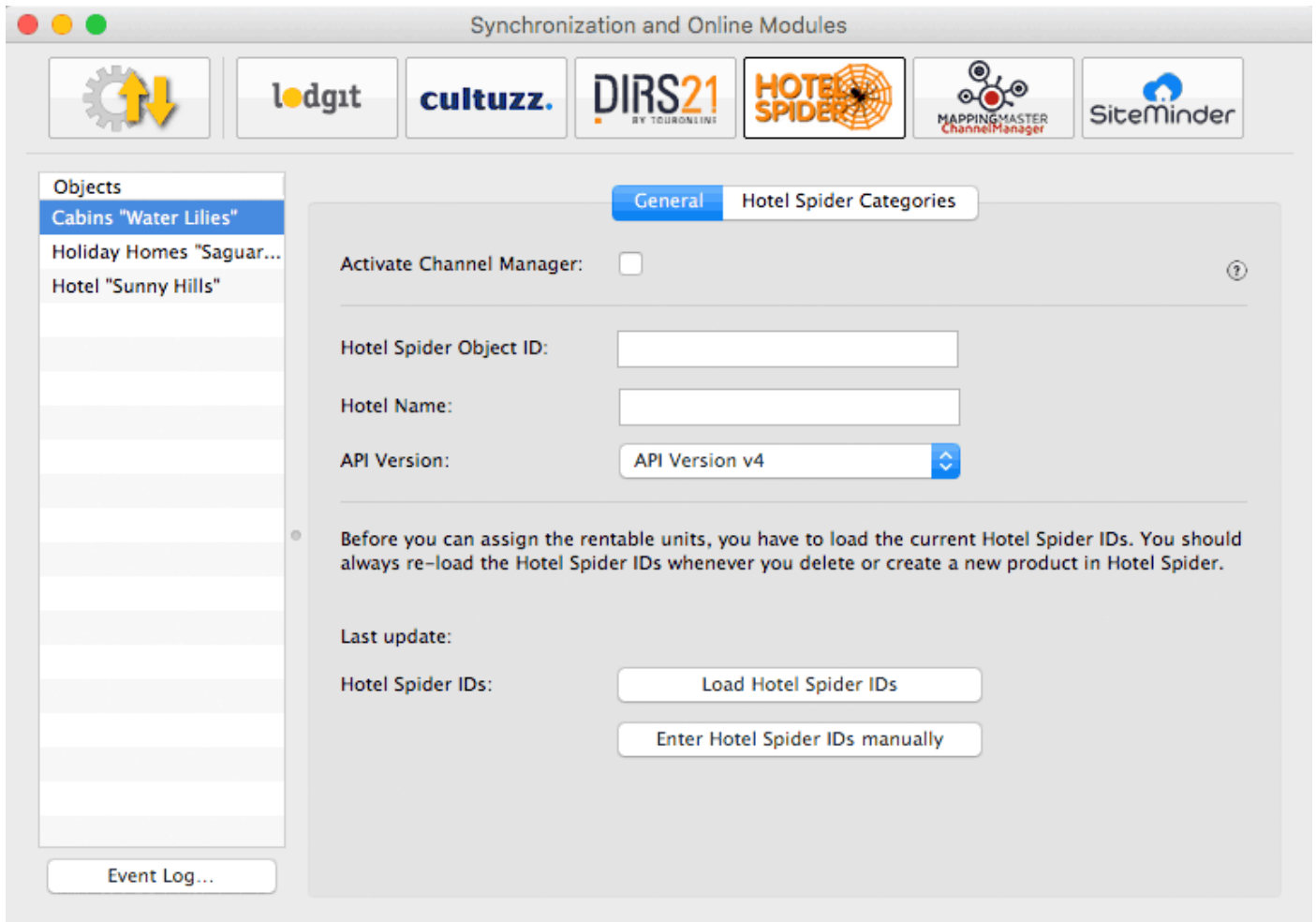
Enter your Hotel-Spider ID and hotel name into the fields and select the version of the interface you are using (usually the latest version). Then press the button Load Hotel-Spider IDs. If this should not work properly (if you are unable to select any HotelSpider categories in the next step) you can also enter the HotelSpider IDs manually by clicking the respective button and filling out the table.
Then, switch to the tab *Hotel-Spider Categories*.

2. First, select the *Mode*. The *Category Mode* is suited best for accommodations with a lot of similar units, like a hotel. The *Unit Mode* is best suited for accommodations with very individual units, like a vacation home rental.

3. In the *left column* you'll find your units or unit categories, depending on which mode you've selected. In the *right column* you can choose which Hotel-Spider category corresponds to which rentable unit or category in Lodgit Desk.
Please note: Categories or units you don't want to synchronise with the channel manager can simply be deselected in the first column.

4. With that, you've already finished the basic setup. Return to the tab General. Check the box that says Activate Channel Manager.

5. Test the connection by going to *File > Synchronise*. This will send your current availabilities of all selected units to the server and you can make sure the availabilities are listed correctly in the backend of the channel manager.
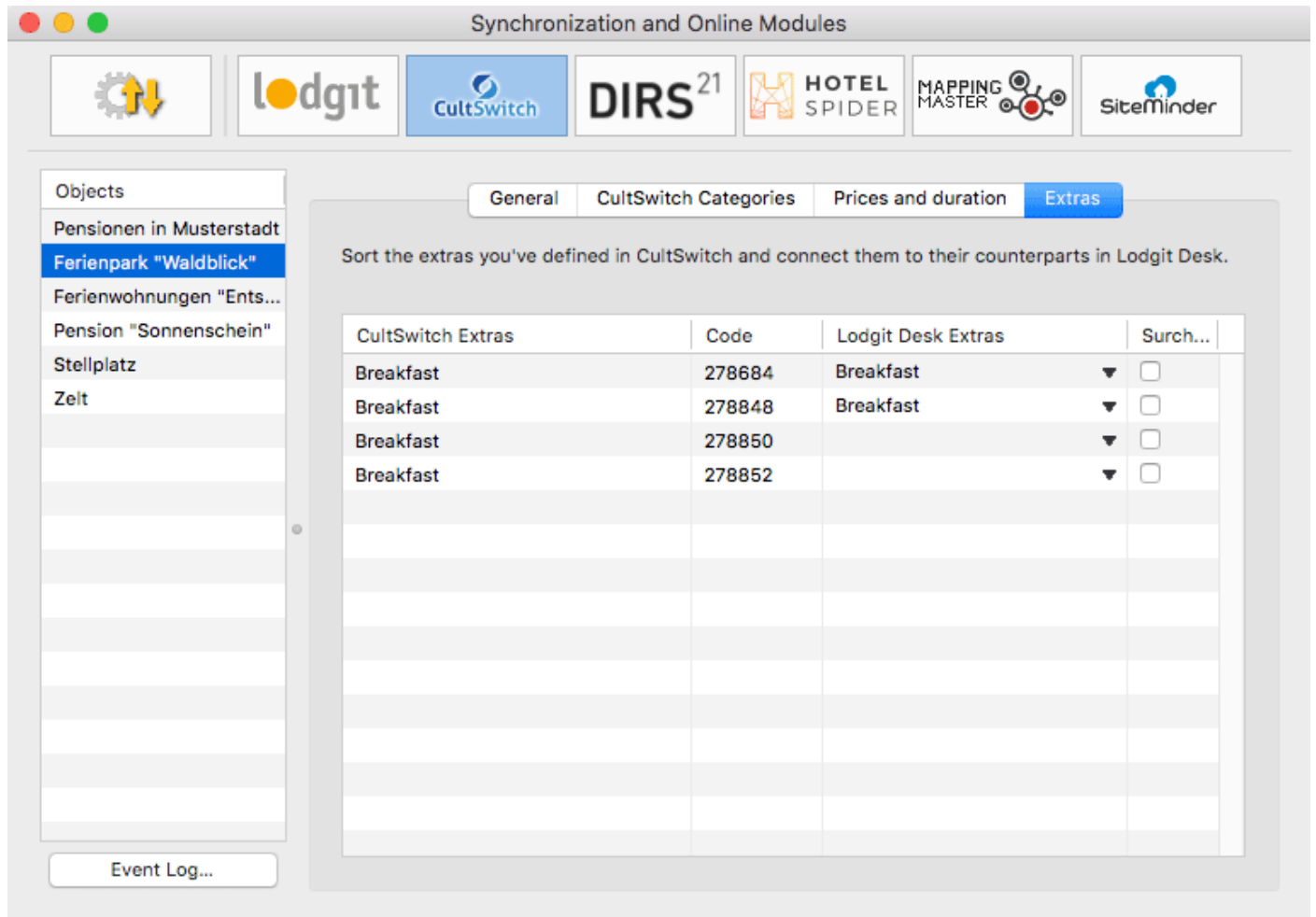**Please note: Due to server sync schedules, it may take a few (up to 15) minutes before the changes are displayed in Hotel-Spider.**

General options

1. You can activate **this computer for synchronising automatically**. When using the database server, you can then ensure that either all computers synchronise (always whichever computer comes first in the specified time frame) or only the computer(s) with the most stable internet access.
2. You can specify the **interval for the synchronisation**
3. You can also decide whether **you want to see a window pop up whenever Lodgit Desk is synchronising** with the online modules.
4. New online bookings are now **locked by default as soon as they're imported**. You have to manually unlock them to move them in the reservation schedule. Here you can turn that automatic lock off by unchecking the box.
5. Furthermore, you can decide, if you want **all bookings in your reservation schedule to be shown in the calendar as "occupied"**, or if you want certain bookings to be shown as "vacant" instead.
   Important: Bookings with the status **Checked Out** are generally considered "vacant" online.
6. Also, you have to check **at least one language** in your database that is to be synchronised.

Frequently Asked Questions Regarding Channel Managers

While the channel managers we currently connect to all have their differences, some questions concerning the basic functionality are the same for each of them.

If both online modules are used simultaneously in Lodgit Desk. What do I have to consider when acquiring?

For technical reasons, the number of rental units booked for the "Interface: Channelmanager" module can only be less than or equal to the number of rental units in the "Online systems" module.

How many units should I put online?

The channel managers themselves advise you to put only 90 to 95% of your available units online. Due to the synchronisation intervals, there is unfortunately no 100% guarantee against over-bookings. Having one or two units per category that you keep offline and usually book last can be a good buffer.

New online bookings always have a lock in the reservation schedule. What is that and how can I turn that off?

The lock means that a booking is looked and cannot be moved, shortened or lengthened. You can manually unlock a booking by unchecking the box in the booking window.

While we've added this feature as a security measure, it's possible to turn off the automatic locking of new online bookings. You can turn this off under Administration > Synchronisation and Online Modules.

A booking couldn't be allocated to a unit. What do I do?

Bookings that cannot be allocated to a unit in Lodgit Desk are first imported anyway. They will be shown in the Booking List with the note **Without Object**. During the import, the channel manager error log will also open and inform you about the issue.

There are different reasons as to why a booking cannot be matched. As soon as you have fixed the reason, you can open the booking via double-clicking the entry in the booking list or the error log and allocate it to the vacant unit:

The category wasn't mapped to a unit:
If the category in the channel manager wasn't mapped to any unit in Lodgit Desk, the booking can't be automatically entered into a unit.
Check if the mapping is correct. If you've changed the categories in the channel manager, you then have to map them anew in Lodgit Desk.

The rooms aren't free for the entire duration:
Lodgit Desk only tells the channel manager how many rooms are vacant, not whether those are the same units. If a room is vacant from A to B and another room is vacant from B to C, then it's possible for a guest to book a unit from A to C.
Move bookings around to always allow for the longest possible duration. If you can't free up a unit for the entire booking duration, you can split it. First, move the booking into the first free unit and then utilise the Split Function.

The rooms have recently filled up:
There are synchronisation intervals between Lodgit Desk and the server, between the server and the channel manager, as well as between the channel manager and the channels. The intervals are very small but necessary to allow all data to be passed through before new data is added. Despite keeping the intervals at only a few minutes, it is possible for a booking to come in even though the room was booked in

the meantime.
In these cases, treat the booking as you would treat any other overbooking.

A booking came in through a channel but it hasn't been imported into Lodgit Desk, yet. Why?

Because of the synchronisation intervals it may take some time for a booking to make its way into your installation. However, once it has reached the channel manager, it should take no more than three regular (automated) synchronisation processes for it to appear in Lodgit Desk.
Is the booking not imported even though it is listed in the channel manager, please contact us.

A booking has been changed in a channel. What happens in Lodgit Desk?

If bookings are changed in a channel, the original booking will be cancelled and a new booking will be created. Both bookings (old and new) will be linked if possible provided that at least one online-booking exists and it has not been replaced by a manually inserted booking.

This holds true for single bookings as well as for group bookings. In the booking list beneath the reservation schedule you find the bookings which have been modified.

The latest booking is bright yellow, cancelled online-bookings are light yellow.

When you move the mouse on a modified online-booking in the reservation schedule and press the right mouse button a context menu will open. Please choose "Select Overbooking". The latest booking as well as the previous bookings are indicated.

Please check whether you have manually changed anything in the cancelled online-booking, i.e. added services or written offers, confirmations or invoices. You can decide if you want to apply custom changes of the old booking to the new booking manually as well and which booking to keep or which one you might choose to delete.

When opening a booking and clicking on the icon "Online-Booking" you see whether the booking had been modified. Via modification number you see whether the booking has been modified a few times. The greater the modification number the

more previous modifications of the booking exist.

Please go to the little arrow on the right hand side in the line "Booking Type" to "Open previous modification".

This might be not only one but multiple bookings.

If you are not currently viewing the latest version you will see that there are further modifications present and you can switch to a newer (next) version by clicking on the little arrow icon (see screenshot above). You can also open the previous version by clicking the arrow above it.

SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER DIRS21   UP
SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER MAPPINGMASTER

Settings for synchronising with channel manager MappingMaster

The requirements

In order to use the channel manager MappingMaster with Lodgit Desk, you'll need:

- the module "Channel Manager Interface" from Lodgit, which you can order in our online shop at www.lodgit.com/shop
- an agreement with the channel manager MappingMaster. You can find a form listing their prices and terms in your Lodgit account at www.lodgit.com. Lodgit users will receive a special pricing as listed in the form.
- contracts and/or agreements with the internet booking channels that you can get on their respective websites.

   Got everything? Then we can get started!

Please note: It is **not recommended** to put all your units online if you connect several units to one channel manager category (e.g. single bedrooms in Lodgit to category "Single" in channel manager). Leave at least 1 unit online, so you'll have some breathing room in the event of over-bookings.

Setting up your MappingMaster account

First, you'll have to set up the units or categories you want to offer in the OTAs in MappingMaster. For any questions about this process, the MappingMaster team will be happy to help.

Activate rentable units for synchronization

You can easily adjust which rentable units can be booked online in the tab "Synchronise". It is irrelevant whether these units will be synchronised with one or several online modules. Here, you'll also decide which of your objects should be combined into a multiple-object system.

Multiple-Object Systems

Lodgit Desk allows you to combine different objects in Lodgit Desk into one system for the modules "Online Systems" and "Interface: Channel Manager". Within Lodgit Desk, these objects will still be handled separately (e.g. to create separate statistics), online they are treated as one object, though.

Assign units in Lodgit Desk

After you have added the categories or units in MappingMaster, you can now assign them to the appropriate units in Lodgit Desk.

1. Open your Lodgit Desk installation and go to *Administration > Synchronization and Online Modules > MappingMaster*. Select the object you want to connect to the channel manager.

2. Enter your MappingMaster Object ID into the field and then press the button Load MappingMaster IDs.
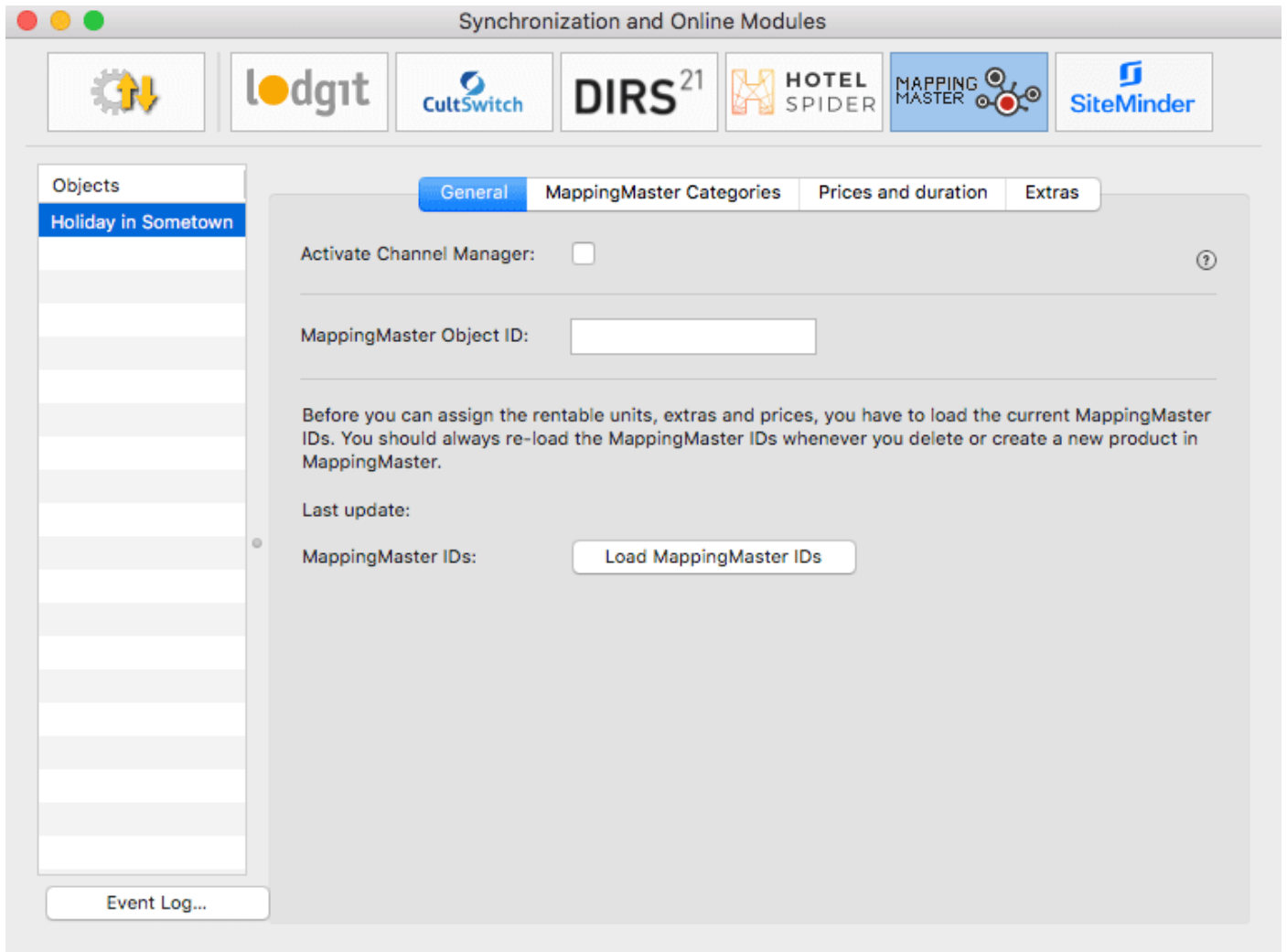
Then, switch to the tab MappingMaster Categories.

    3. First, select the Mode (see red arrow). The Category Mode is suited best for accommodations with a lot of similar units, like a hotel. The Unit Mode is best suited for accommodations with very individual units, like a vacation home rental.
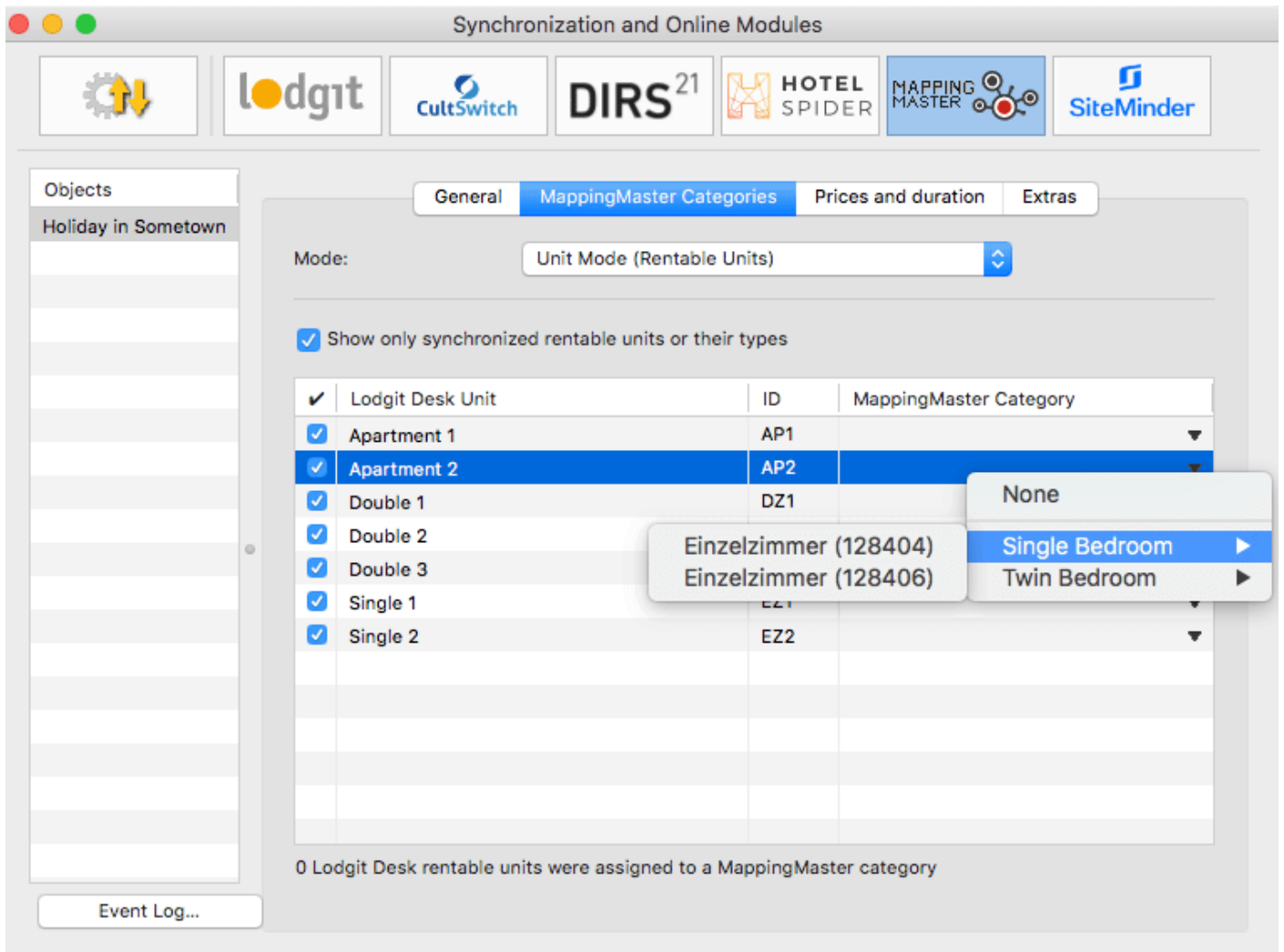
4. In the *left column* you'll find your units or unit categories, depending on which mode you've selected. In the *right column* you can choose which MappingMaster category corresponds to which.
Please note: Categories or units you don't want to synchronize with the channel manager can simply be deselected in the first column.

5. With that, you've already finished the basic setup. Test the connection by going to *File > Synchronize*. This will send your current availabilities of all selected units to the server and you can make sure the availabilities are listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in MappingMaster.

Manage prices from within Lodgit (optional)

As a MappingMaster premium partner, Lodgit can also send prices to the Channel Manager.
Important: You can manage the prices EITHER in Lodgit Desk OR in MappingMaster directly. Changes made to the prices in MappingMaster cannot be imported into Lodgit Desk.

1. Select your object in the window *Synchronization and Online Modules > MappingMaster* and go to the *Prices* area. Check the field *Send prices to MappingMaster:*

2. Select a MappingMaster category in the list and enter the base price. The base price is listed "per night" and default occupancy. It will always be used unless you've defined special prices for a time frame.

3. In the list underneath the base price, you can define time frames with different prices (e.g. seasonal prices). With the Actions menu you can import those price settings from your Price Management in Lodgit Desk.

4. You must add at least a base price for all categories! Test the connection by going to *File > Synchronize*. This will send your current prices of all selected units to the server and you can make sure the availabilities are listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in MappingMaster.

Link MappingMaster extras to Lodgit extras (optional)

MappingMaster lets you create extras ("Products") that you can link to the extras you have in Lodgit Desk. During the import of the bookings, the extras will then be selected and added to the booking correctly. That way, the bookings from MappingMaster will fit seamlessly into your analysis for extra items and services.

1. Select your object in the window *Synchronization and Online Modules >*

MappingMaster and go to the *Extras* area. There you'll find a table listing all of MappingMaster' extras in the left column.
Should you not see any extras listed in this table, please go back to *General* and click the button "Load MappingMaster IDs".

2. In the column to the right, select the Lodgit extras you want to link to the MappingMaster extra item. Check the items that are going to be listed as 'inklusive' in the booking:
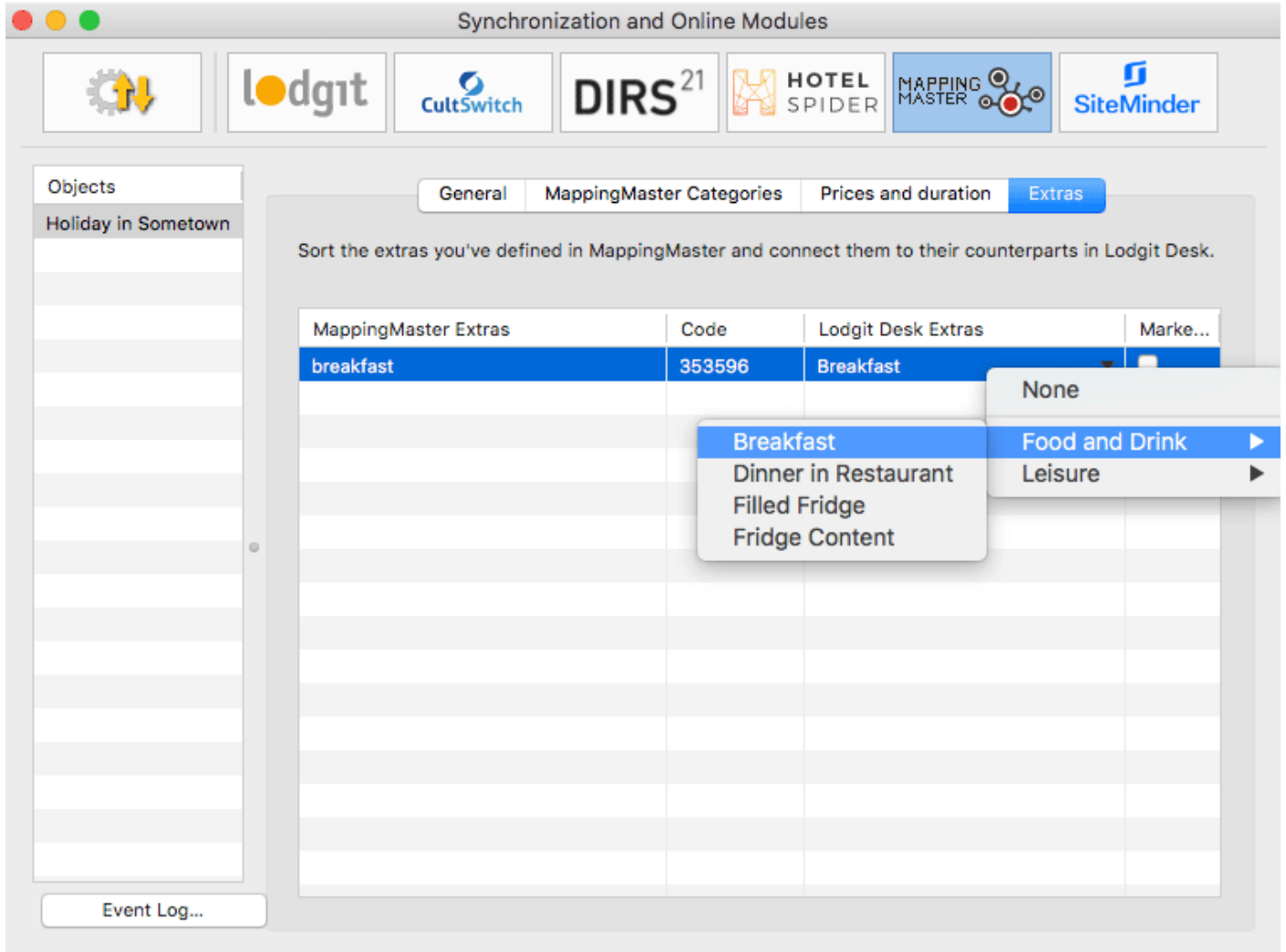
3. Test the connection by going to *File > Synchronize*. This will send your current extrasto the server and you can make sure everything is listed correctly in the backend of the channel manager.
Please note: Due to server sync schedules, it may take a few minutes before the changes are displayed in MappingMaster.

General options

1. You can activate **this computer for synchronising automatically**. When using the database server, you can then ensure that either all computers synchronise (always whichever computer comes first in the specified time frame) or only the computer(s) with the most stable internet access.
2. You can specify the **interval for the synchronisation**
3. You can also decide whether **you want to see a window pop up whenever Lodgit Desk is synchronising** with the online modules.
4. New online bookings are now **locked by default as soon as they're imported**. You have to manually unlock them to move them in the reservation schedule. Here you can turn that automatic lock off by unchecking the box.
5. Furthermore, you can decide, if you want **all bookings in your reservation schedule to be shown in the calendar as "occupied"**, or if you want certain bookings to be shown as "vacant" instead.
   Important: Bookings with the status **Checked Out** are generally considered "vacant" online.
6. Also, you have to check **at least one language** in your database that is to be synchronised.

Frequently Asked Questions Regarding Channel Managers

While the channel managers we currently connect to all have their differences, some questions concerning the basic functionality are the same for each of them.

If both online modules are used simultaneously in Lodgit Desk. What do I have to consider when acquiring?

For technical reasons, the number of rental units booked for the "Interface: Channelmanager" module can only be less than or equal to the number of rental units in the "Online systems" module.

How many units should I put online?

The channel managers themselves advise you to put only 90 to 95% of your available units online. Due to the synchronisation intervals, there is unfortunately no 100% guarantee against over-bookings. Having one or two units per category that you keep offline and usually book last can be a good buffer.

New online bookings always have a lock in the reservation schedule. What is that and how can I turn that off?

The lock means that a booking is looked and cannot be moved, shortened or lengthened. You can manually unlock a booking by unchecking the box in the booking window.

While we've added this feature as a security measure, it's possible to turn off the automatic locking of new online bookings. You can turn this off under Administration > Synchronisation and Online Modules.

A booking couldn't be allocated to a unit. What do I do?

Bookings that cannot be allocated to a unit in Lodgit Desk are first imported anyway. They will be shown in the Booking List with the note **Without Object**. During the import, the channel manager error log will also open and inform you about the issue.

There are different reasons as to why a booking cannot be matched. As soon as you have fixed the reason, you can open the booking via double-clicking the entry in the booking list or the error log and allocate it to the vacant unit:

The category wasn't mapped to a unit:
If the category in the channel manager wasn't mapped to any unit in Lodgit Desk, the booking can't be automatically entered into a unit.
Check if the mapping is correct. If you've changed the categories in the channel manager, you then have to map them anew in Lodgit Desk.

The rooms aren't free for the entire duration:
Lodgit Desk only tells the channel manager how many rooms are vacant, not whether those are the same units. If a room is vacant from A to B and another room is vacant from B to C, then it's possible for a guest to book a unit from A to C.
Move bookings around to always allow for the longest possible duration. If you can't free up a unit for the entire booking duration, you can split it. First, move the booking into the first free unit and then utilise the Split Function.

The rooms have recently filled up:
There are synchronisation intervals between Lodgit Desk and the server, between the server and the channel manager, as well as between the channel manager and the channels. The intervals are very small but necessary to allow all data to be passed through before new data is added. Despite keeping the intervals at only a few minutes, it is possible for a booking to come in even though the room was booked in

the meantime.
In these cases, treat the booking as you would treat any other overbooking.

A booking came in through a channel but it hasn't been imported into Lodgit Desk, yet. Why?

Because of the synchronisation intervals it may take some time for a booking to make its way into your installation. However, once it has reached the channel manager, it should take no more than three regular (automated) synchronisation processes for it to appear in Lodgit Desk.
Is the booking not imported even though it is listed in the channel manager, please contact us.

A booking has been changed in a channel. What happens in Lodgit Desk?

If bookings are changed in a channel, the original booking will be cancelled and a new booking will be created. Both bookings (old and new) will be linked if possible provided that at least one online-booking exists and it has not been replaced by a manually inserted booking.

This holds true for single bookings as well as for group bookings. In the booking list beneath the reservation schedule you find the bookings which have been modified.

The latest booking is bright yellow, cancelled online-bookings are light yellow.

When you move the mouse on a modified online-booking in the reservation schedule and press the right mouse button a context menu will open. Please choose "Select Overbooking". The latest booking as well as the previous bookings are indicated.

Please check whether you have manually changed anything in the cancelled online-booking, i.e. added services or written offers, confirmations or invoices. You can decide if you want to apply custom changes of the old booking to the new booking manually as well and which booking to keep or which one you might choose to delete.

When opening a booking and clicking on the icon "Online-Booking" you see whether the booking had been modified. Via modification number you see whether the booking has been modified a few times. The greater the modification number the

more previous modifications of the booking exist.

Please go to the little arrow on the right hand side in the line "Booking Type" to "Open previous modification".

This might be not only one but multiple bookings.

If you are not currently viewing the latest version you will see that there are further modifications present and you can switch to a newer (next) version by clicking on the little arrow icon (see screenshot above). You can also open the previous version by clicking the arrow above it.

SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER HOTEL-SPIDER   UP
SETTINGS FOR SYNCHRONIZING WITH CHANNEL MANAGER SITEMINDER

Settings for channel manager Siteminder

With the additional module "Interface: Channel Manager" you can easily make your vacancies available to the channel manager Siteminder which will in turn send it to other online booking channels (e.g. HRS, booking.com). The bookings you receive through these channels will also be sent to your Lodgit Desk installation automatically, where you can view and work with them.

You can see a list of all available channels on the channel manager's website. In order to use this module, you'll also need a valid user agreement with Siteminder.

Step 1: Create categories or units and extra items on Siteminder

First, you'll have to add your unit's categories (or, depending on the search mode you'll use, your units) to Siteminder's database. You'll also receive a **spreadsheet with your categories and room codes** from your Siteminder contact. You will need that later when you set up the connection in Lodgit Desk.

If you need any help setting up the categories in Siteminder, please contact the Siteminder Team.

Step 2: Set up units for synchronisation

If you haven't used the Online Systems or Channelmanager Interface before, you first have to set up which units you want to synchronise online.

Step 3: Allocate categories or units

After you've set everything up in Siteminder, open Lodgit Desk. There, go to **Administration > Synchronisation and Channel Manager** and click on the tab **Siteminder > General**.
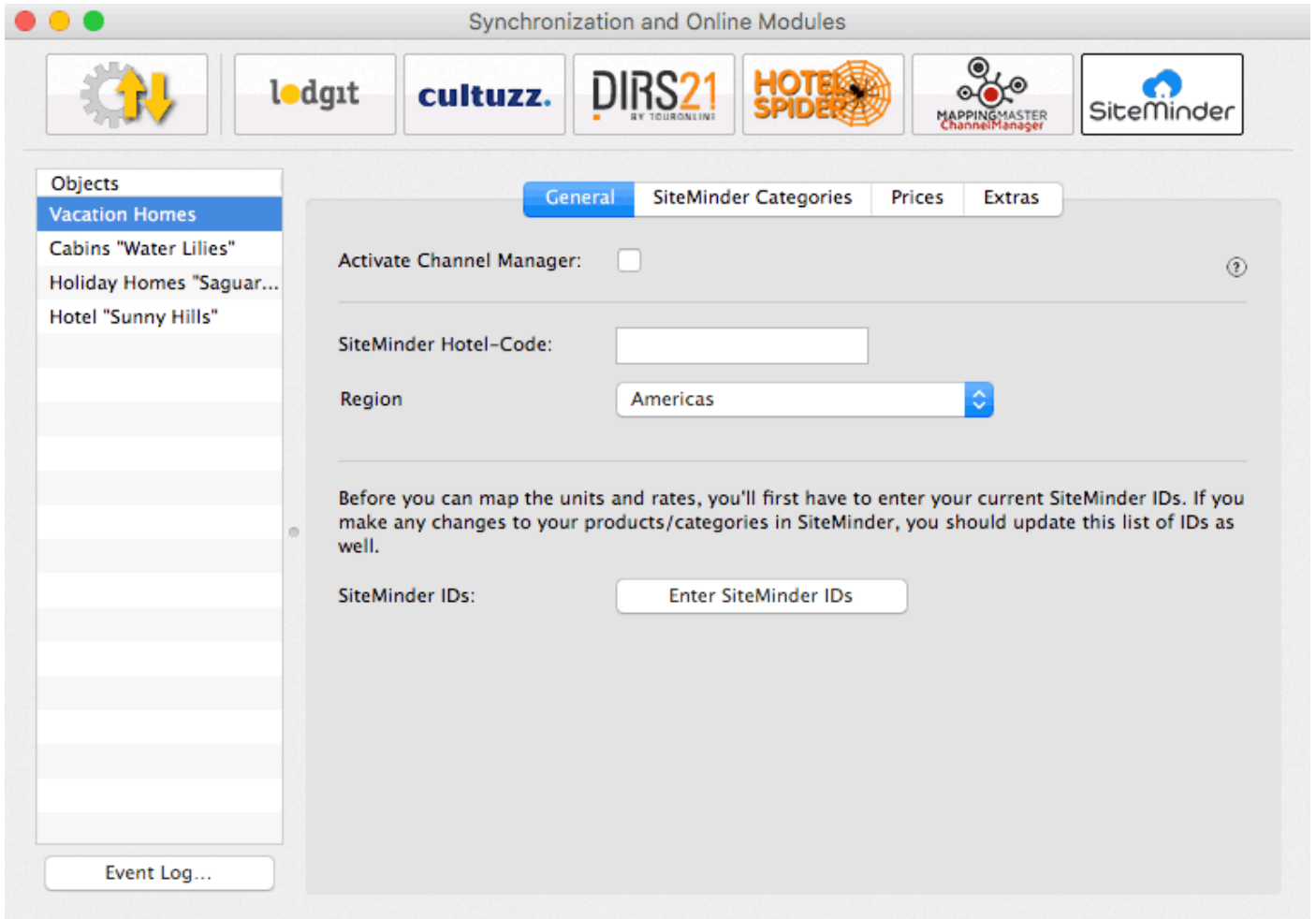
Now follow these steps to configure the rentable units or rentable unit types:

1. Enter your **Hotel Code** from the file you received from your Siteminder agent in the field "Siteminder Object ID". Select your **Region** from the drop down menu.

2. Press the button "Enter Siteminder IDs" to open a new window:
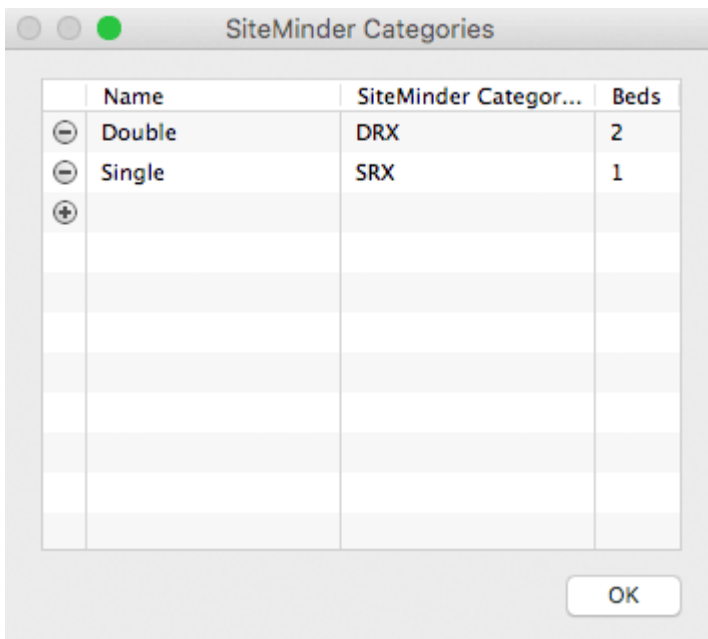
3. Enter the category names and room codes you received in the file from your Siteminder agent. Also enter the number of default occupancy. This is important for the setup of the prices which you can do later.

4. After you're done setting up the categories, close the window and go to the tab **Siteminder Categories**.

5. Select whether you want to work in **Unit Mode** or **Category Mode**. The unit mode links Siteminder categories to single units in Lodgit Desk (which is best if you have very individual units), whereas the category mode links them to unit categories (which is best if you have a lot of units that are the same).

6. In the list, select which units/categories belong to which Siteminder categories:
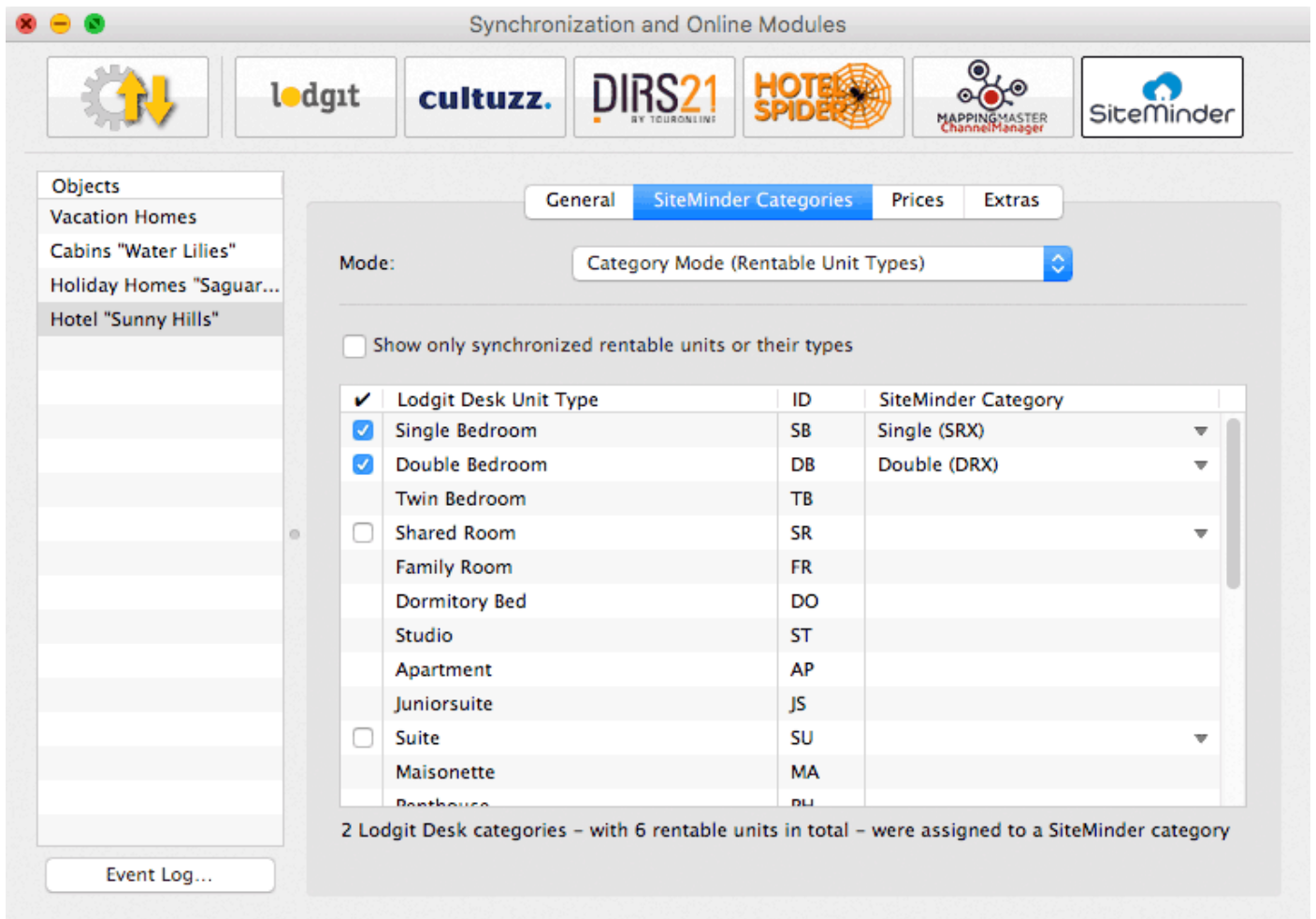
Make sure to **check the box in the first column** for each unit you want to synchronise. If it is left unchecked, the respective units and/or categories will NOT be synchronised.

6. Go back to the tab **General** to check the box "Activate Channel Manager" to start working with the channel manager:

Optional: Send prices to Siteminder

The area **Prices** allows you to send your rates for each category to Siteminder.

> You may only send **base and seasonal prices for the default occupancy**. If you want to define more detailed prices (e.g. prices per channel), you will have to do so in the Siteminder web interface.

1. First select a category in the list and enter a **base price**. This price will always be used whenever no other seasonal price is available.

2. Then you can either enter seasonal prices manually OR load them from the date you have in your price management:
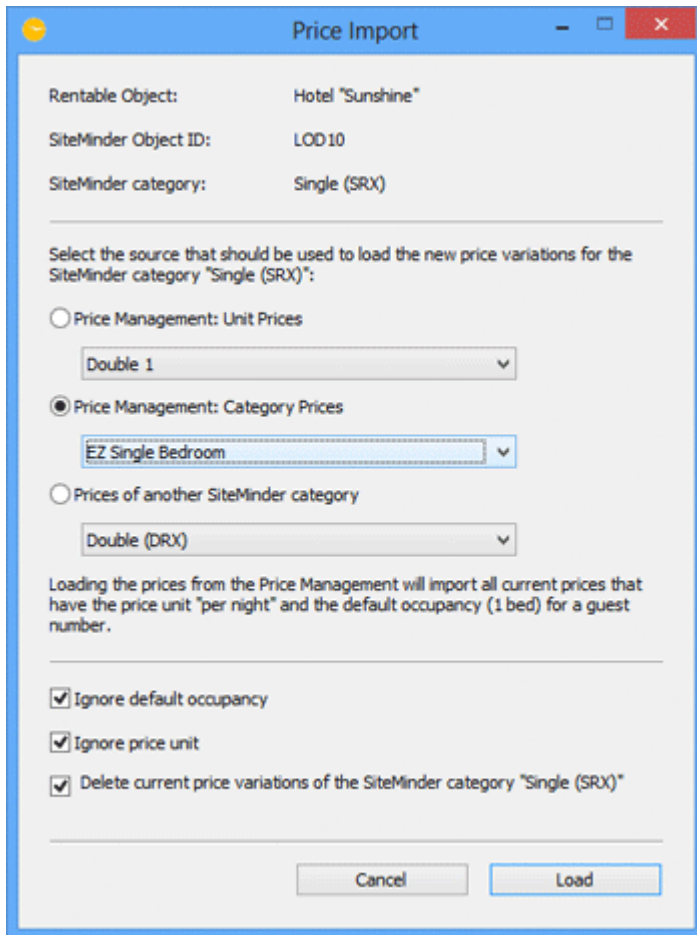
3. Now select which data you want to import: either the prices **of a certain rentable unit**, a price of **a certain category**, or the prices **of another Siteminder category** that you already entered.

> If you select "Ignore default occupancy" and/or "Ignore price unit", you will import prices that don't have the correct default occupancy and/or a different price unit than "per night". Please make sure to check the imported rates for accuracy.

4. After you have entered all base and seasonal prices, please check the box "Send prices to Siteminder" to activate this feature:

Important!
The prices will be sent for ALL categories that you have allocated to Lodgit Desk units/categories. Please make sure that **you enter at least a base price price for ALL categories** to avoid errors!

Optional: Extra services

Siteminder allows you to have certain extra services entered directly into the booking when it's imported. You can match these in the tab **Extras** to extra items you have set up in Lodgit Desk:

If you don't find a matching item in your Lodgit Desk management, you don't need to map them. They will be imported as a collective extra item into the booking.

Step 4: Synchronize

After you have linked all units/categories and activated your object, go to **File > Synchronize**. When synchronizing the first time, synchronize **twice** to send all vacancies and links to cultuzz.

Within your cultuzz account, make sure that everything was sent to the channel manager correctly.

Please note:
It can take a few minutes for the changes to be reflected in your cultuzz account.

Changes in vacancies as well as new bookings will be sent via synchronization. Make sure to synchronize your system with the server regularly to avoid overbookings and errors.

Automatic synchronization
You can set the synchronization process to happen automatically, too! More information on that here.

Frequently Asked Questions Regarding Channel Managers

Frequently Asked Questions Regarding Channel Managers

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While we've added this feature as a security measure, it's possible to turn off the automatic locking of new online bookings. You can turn this off under Administration > Synchronisation and Online Modules.

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In these cases, treat the booking as you would treat any other overbooking.

A booking came in through a channel but it hasn't been imported into Lodgit Desk, yet. Why?

Because of the synchronisation intervals it may take some time for a booking to make its way into your installation. However, once it has reached the channel manager, it should take no more than three regular (automated) synchronisation processes for it to appear in Lodgit Desk.
Is the booking not imported even though it is listed in the channel manager, please contact us.

A booking has been changed in a channel. What happens in Lodgit Desk?

If bookings are changed in a channel, the original booking will be cancelled and a new booking will be created. Both bookings (old and new) will be linked if possible provided that at least one online-booking exists and it has not been replaced by a manually inserted booking.

This holds true for single bookings as well as for group bookings. In the booking list beneath the reservation schedule you find the bookings which have been modified.

The latest booking is bright yellow, cancelled online-bookings are light yellow.

When you move the mouse on a modified online-booking in the reservation schedule and press the right mouse button a context menu will open. Please choose "Select Overbooking". The latest booking as well as the previous bookings are indicated.

Please check whether you have manually changed anything in the cancelled online-booking, i.e. added services or written offers, confirmations or invoices. You can decide if you want to apply custom changes of the old booking to the new booking manually as well and which booking to keep or which one you might choose to delete.

When opening a booking and clicking on the icon "Online-Booking" you see whether the booking had been modified. Via modification number you see whether the booking has been modified a few times. The greater the modification number the more previous modifications of the booking exist.

Please go to the little arrow on the right hand side in the line "Booking Type" to "Open previous modification".

This might be not only one but multiple bookings.

If you are not currently viewing the latest version you will see that there are further modifications present and you can switch to a newer (next) version by clicking on the little arrow icon (see screenshot above). You can also open the previous version by clicking the arrow above it.

Settings for synchronizing with channel manager Siteminder   Up   Database Server

Additional module Database Server

Once you have purchased this additional module, Lodgit Desk will allow you to work concurrently from different workstations.

When you use Lodgit Desk in single user mode, the test and work database are saved as files on your computer. In multiple user mode, several computers can access the same databases located on the database server. This server can be installed on a different computer in your network, but it's also possible to install it on the same computer you've installed Lodgit Desk on.

Once the server module was added to your Lodgit Desk license, you can switch between single user and multiple user mode while the software is running. The software will always remember the last mode used when you open it.

> **Important!** A database that is used as a server database cannot be used as a local work database at the same time! Otherwise, data may be lost.

FREQUENTLY ASKED QUESTIONS REGARDING CHANNEL MANAGERS   UP   SETTING UP THE DATABASE SERVER

Setting up the database server

Prepare for use in multiple user mode

Before you can use Lodgit Desk's multiple user mode you first have to install the database server **cubeSQL** by SQLabs. This server can be installed on a computer with a Mac OS X, Windows or Linux operating system. It is very reliable, adheres to ACID standards and comes equipped with an administration program that you can use to configure the database server. More information can be found in the server's documentation.

Follow these steps to start using Lodgit Desk in multiple user mode.

1. Installation of database server

Download the current version of the database server cubeSQL for your operating system from the provider's website and install it according to the instructions. Best performance can be achieved by installing the server in the same subnetwork as your workstations. Usually, the server doesn't need a lot of resources so that you can install it on one of your workstation computers. The server can also be installed in a different network as long as the network connection's performance is high enough to allow working comfortably with it.
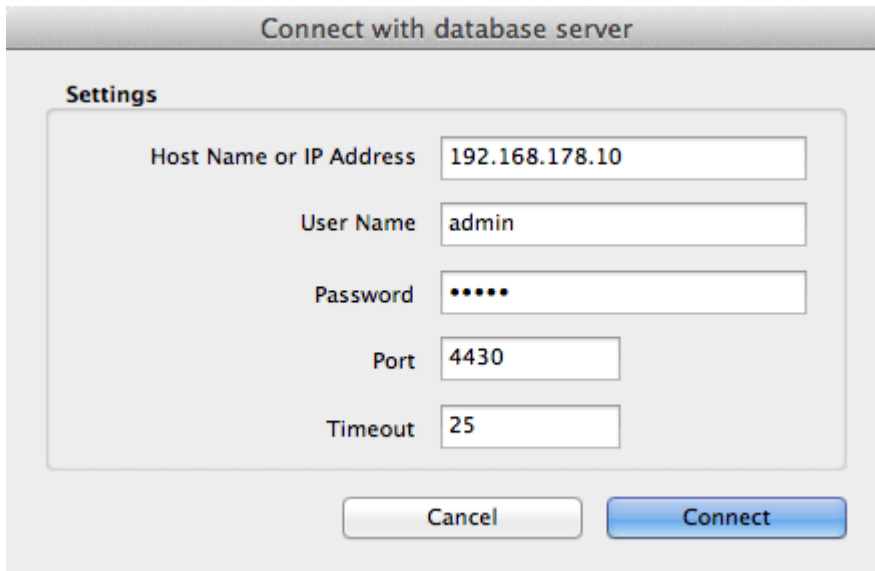
The administration tool cubeSQLAdmin is delivered along with the cubeSQL server (the administration tool is NOT the server). The server itself is executed on Windows and Mac in the background as a service. On Windows, the server can be started and stopped under "Control Panel > Administrative Tools > Services". On Macintosh, you can find these functions in the System Preferences.

Enter the license key of the database server within the tool cubeSQLAdmin under "Server > Register Server":
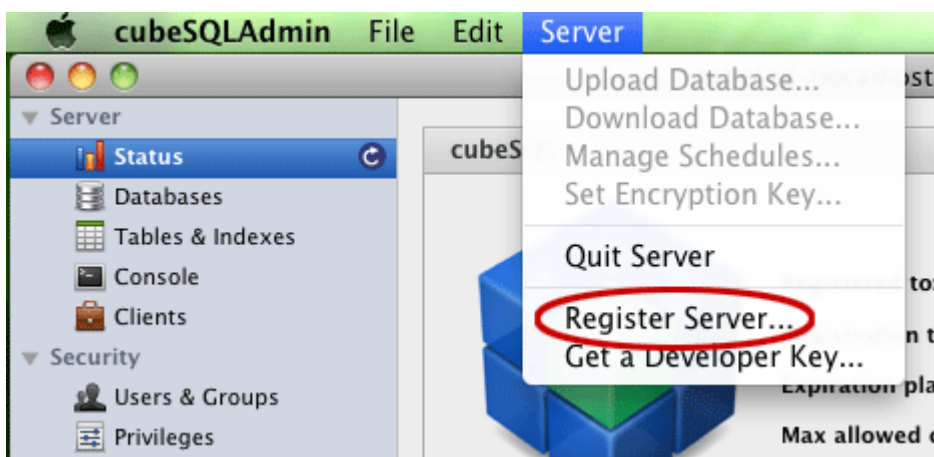
2. Make database available on the server

Make sure that the server is installed and ready to go by using the utility tool cubeSQLAdmin to connect with the server. Start Lodgit Desk on the workstation that has your most current Lodgit Desk database on it. Within Lodgit Desk, go to **File > Database > Use Database Server**.

Connect to the database server. Lodgit Desk checks if the databases are installed on the server. If it can't find the databases it will offer to send the local databases to the server instead. After the databases were uploaded successfully, they will be available to every workstation with Lodgit Desk that connects with the database server.

In the event that the automatic upload of the database fails, please do the following:

1. Quit Lodgit Desk. If the application is unresponsive, use the TaskManager (Windows) or Force Quit (Mac).
2. Restart the cubeSQL server. On Windows, you can find this option under "Control Panel > Administrative Tools > Services" and on Mac, you can find it in the System Preferences.
3. Start the cubeSQLAdmin tool. Go to "Databases", select the Lodgit Desk database(s) and then presse the "Drop" button. This ensures that no faulty databases are on the server.
4. Upload the databases manually. In cubeSQLAdmit, go to the menu item "Server > Upload Database" and select the Lodgit Desk work and demo database from your computer.

Note:
If there are connectivity problems between Lodgit Desk and the server (e.g. error message: "An error occurred while trying to connect."), please make sure that the firewalls of client and server allow for such connections between workstation and server and that the UDP port 4440 is not blocked, which–for example–is the default setting of many firewalls.

Should your installation not "remember" that the database server mode was activated, please do the following:

1. Open Lodgit Desk and activate your software license in "File > Software Activation…".
2. Connect to the database server by going to "File > Use database server…".
3. Activate your software license again in "File > Software Activation…".

Things to keep in mind when using the multiple user

mode

> **Please note**: **From Lodgit Desk version 2.8.2 onwards we recommend the use of cubeSQL version 5.9.0** (released 28th of July 2022).

When using Lodgit Desk in multi user mode there are a couple of things you need to be aware of.

Database backups

When using the multiple user mode the database server is responsible for backups. The backup feature must be configured with the utility tool cubeSQLAdmin after installing the server.

To find out how to use the backup feature, please go to the backup settings for the database server.

Restricted access for concurrently edited objects

If more than one workstation within the network tries to access the same object (booking, cashbook, object administration, etc.), access will be granted to the workstation that came first. Everyone else cannot access the object until the first user has exited it.

DATABASE SERVER   UP   BACKUP SETTINGS

Database Server: backup settings

Important!
When using Lodgit Desk in database server mode, the automatic backup feature of Lodgit Desk DOES NOT work. The backups have to be made by the database server itself and have to be defined manually.

The backup settings for the database server can be defined with the **admin tool cubeSQLAdmin**.

1. Create backup schedules

To utilize the server's backup feature, you will have to create a backup schedule. To do that, go to "Advanced > Schedules" within the tool cubeSQLAdmin.
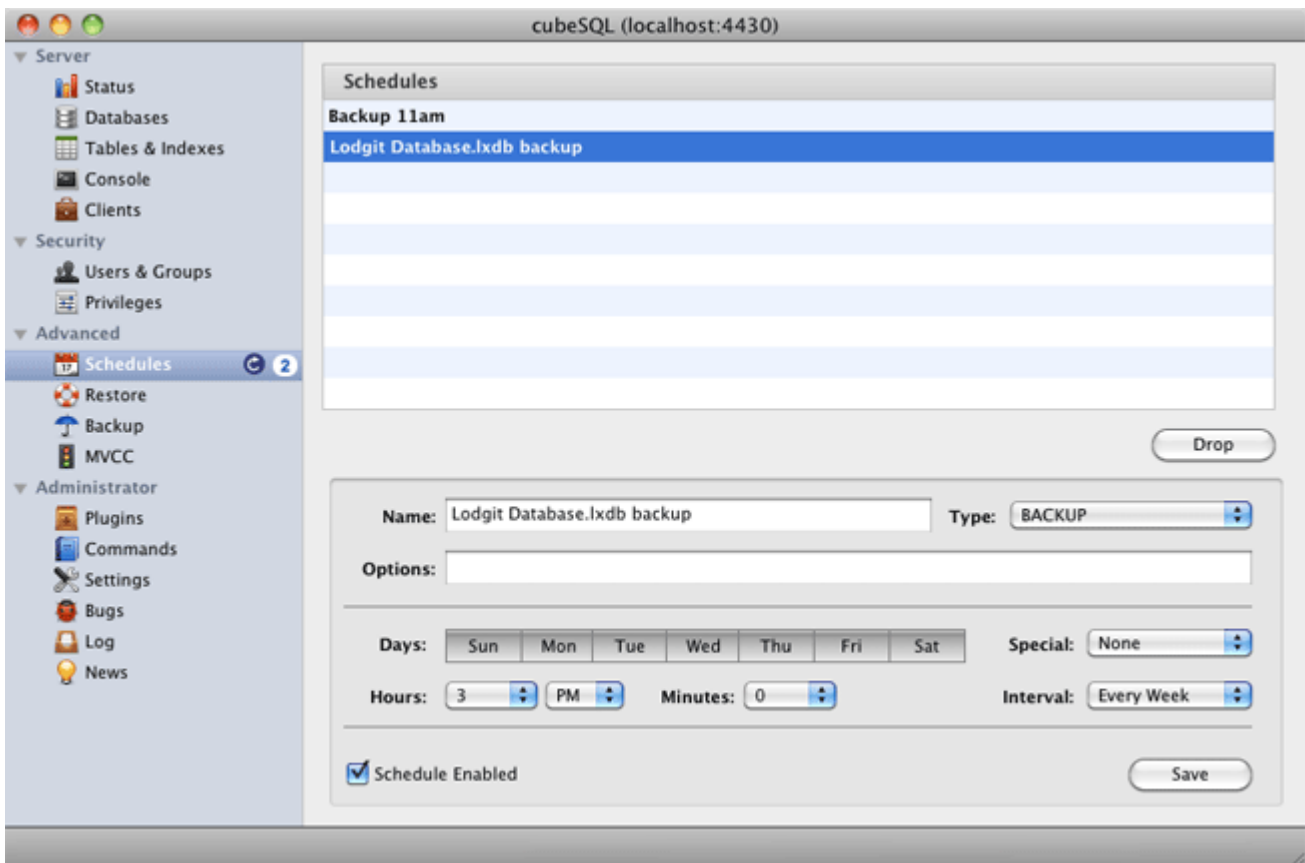
Here you can create a backup schedule for a certain time of day during the selected weekdays (e.g. every day at 3PM; see screenshot for setting). Create at least one daily backup schedule for a time when the computer with the server is always (or at least most always) running. Make sure to check the box that says "Schedule Enabled". You can, of course, create several different schedules for different times of the day: in our example, we have created one schedule for 11AM and one for 3PM; more backups mean more data security.

> **Note:**
> Since more backups mean more data security, we recommend to backup your files every hour. That means you'll have to create a backup schedule for every hour.

2. Link backup schedules to a database

After you have created your backup schedules, go to "Server > Databases". Here you'll find the Lodgit Desk databases you uploaded to the server when you first connected to it via Lodgit Desk. Select the work database named "Lodgit Database.lxdb". Then, in the menubar, go to "Server > Manage Schedules…".
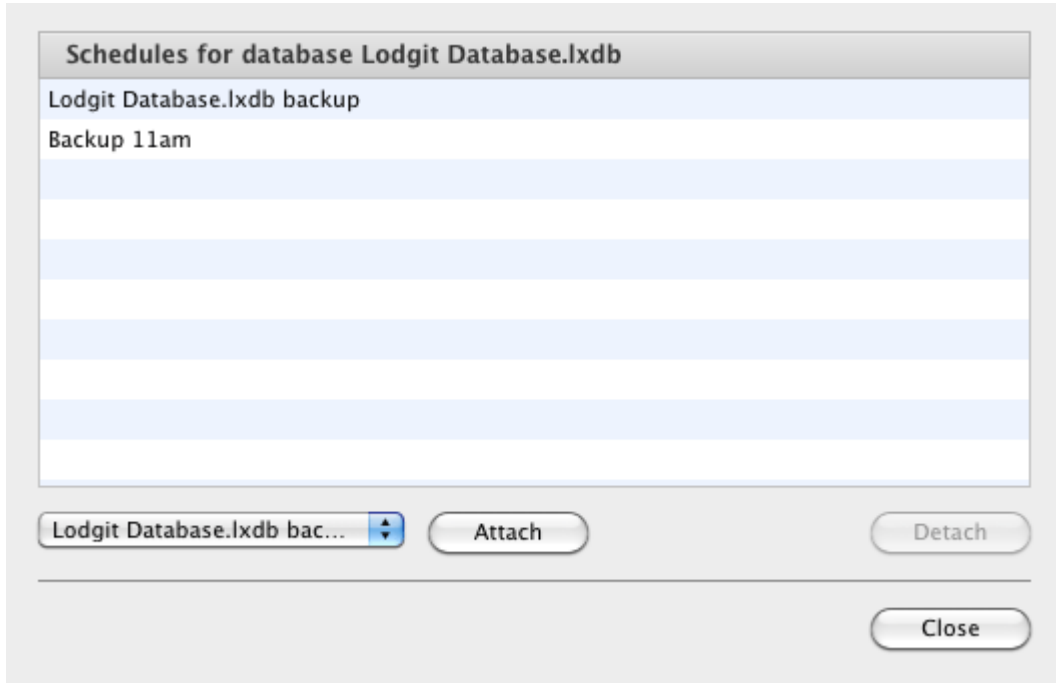
Select your schedule in the drop down list and then press the "Add" button. This will link the schedule to the database and make sure that the backup is created at the set time. Every schedule you created has to be linked manually to the database.

> **Important:**
> *Schedules that are not linked to the database will NOT be run. Please make sure that your created schedules are linked to the Lodgit Desk database.*

Location of server backup files

You can find the locations of your database, backup files, etc. in the tab **Settings**:
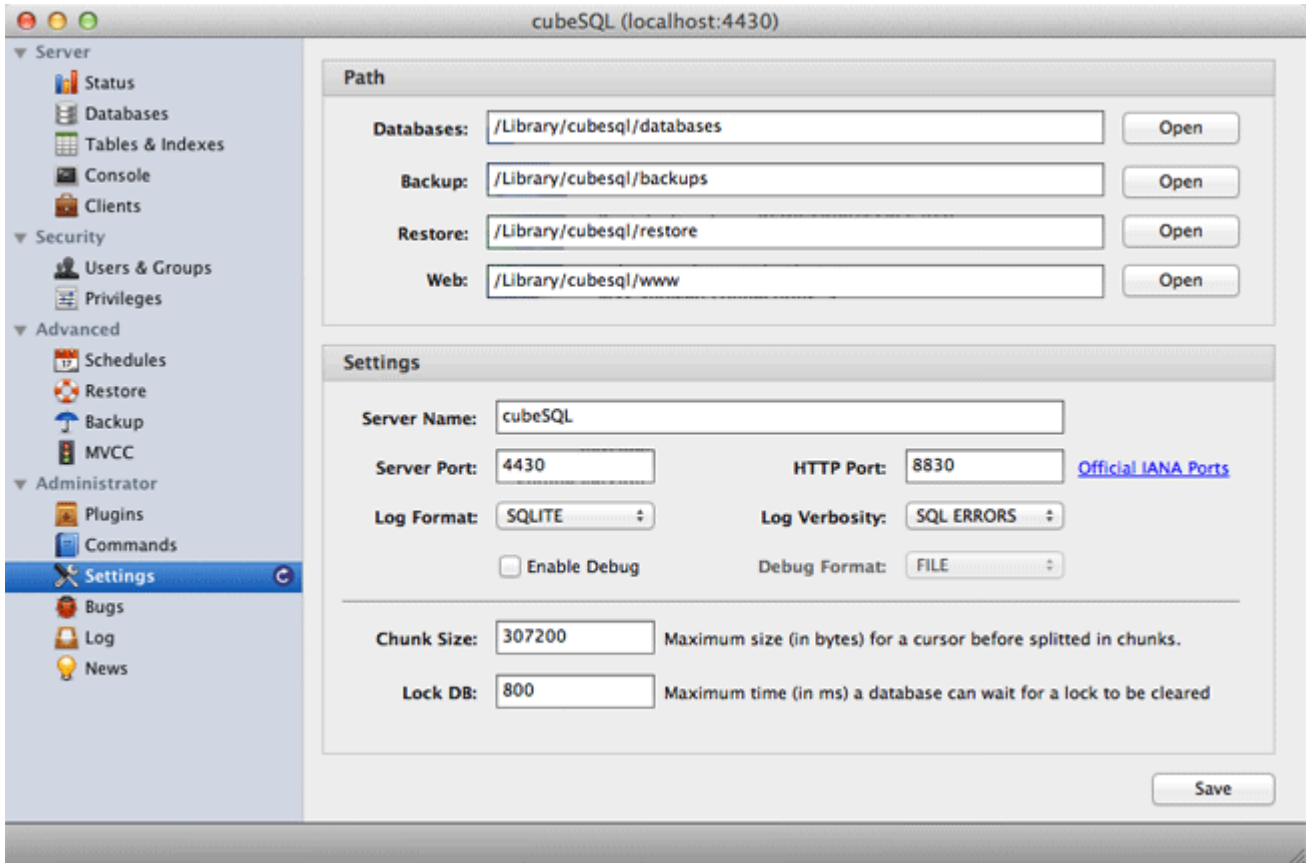
Restore from backup

Should you ever need to restore your database from a backup, you can do so in the tab **Backup**.

> **Important:**
> Make sure that you have quit all Lodgit Desk installations before restoring from a backup file!
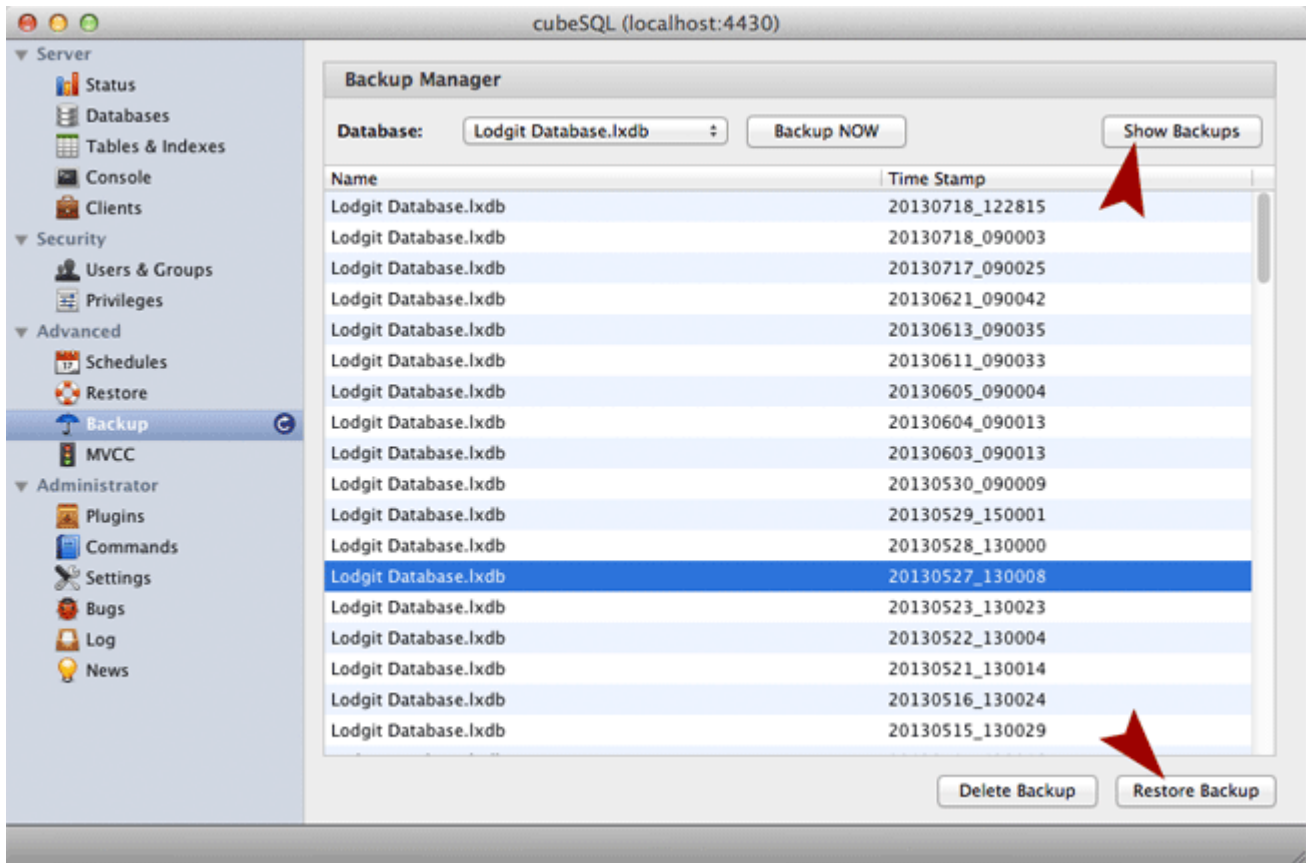
1. First check whether the database "Lodgit Database.lxdb" is selected. If it wasn't automatically selected, choose it manually from the drop down menu in the upper left area.

2. Press the button "Show Backups" in the right upper corner. This will show all backups available on the server for this database. Each backup is marked with a time stamp:
   20130527_130008 means the backup is from May 27 2013, 1PM

3. Select the backup you want to restore and then press the button "Restore Backup".

> **Note:**
> *After you have restored the database from a backup, you may have to activate the license.*

Update Lodgit Desk version on all computers

An update to a new Lodgit Desk version is usually done directly from Lodgit Desk.

If you are working with the database server, the database that is accessed by multiple workstations will also be updated when Lodgit is updated on one machine. If you now try to open Lodgit Desk on a second computer, the following message will appear:
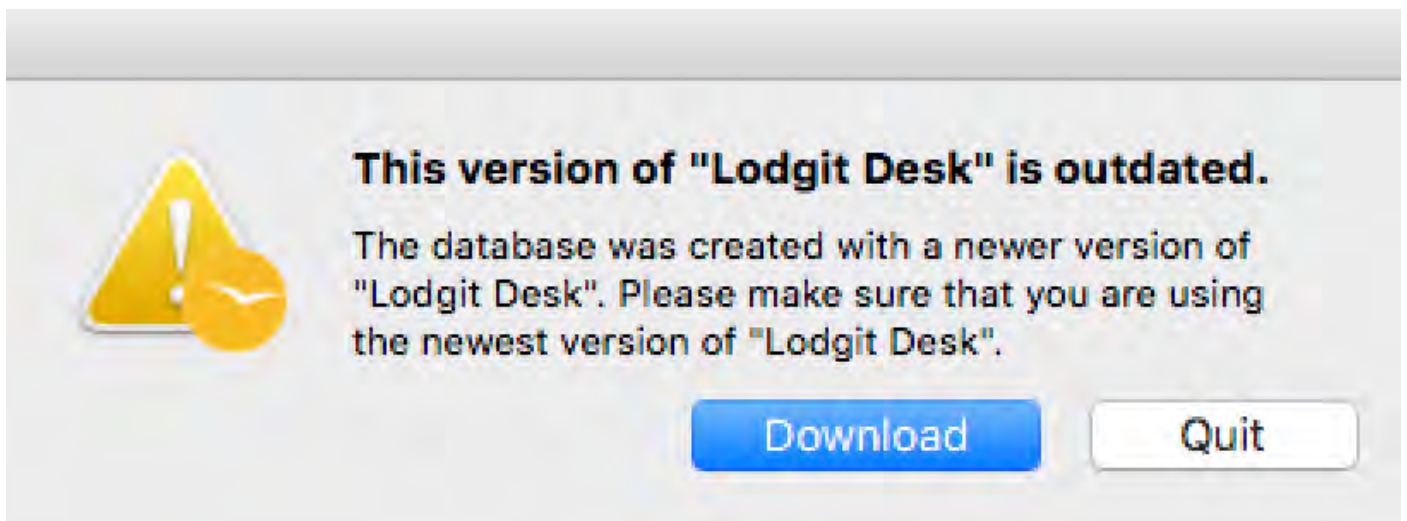
The database is created with a newer version than the installed Lodgit Desk, so you cannot open it.

Just click the button >Download. This will take you directly to the right place on our website, download the latest version of Lodgit Desk to your computer and install it.

After that you can open Lodgit Desk as usual.

Backup settings   Up   Online Booking System

Additional module Online Booking System

To receive bookings in Lodgit Desk automatically via the Internet, we offer you the option of using the Lodgit online booking system (included in the add-on module "Online Systems"), which you can integrate into your website with a link and configure via your personal user area on the Lodgit website.

> Tip: You can always test the Online Booking System when you are using the Test Database.

Requirements for using the Online Systems

- You can add the additional module Online Systems to your existing Lodgit Desk license in our online shop. The module is available for **a small monthly fee per rentable unit**. The term for the module is the same as the remaining term of your Lodgit Desk license and the fees will be billed in one go. Other costs, such as commissions for incoming bookings, do not accrue!

  > Tip: You don't have to make all of your rentable units available online. If you have lots of units of the same type and price (e.g. 10 single bedrooms), you can also synchronise only a few of them and then move the incoming bookings into a different unit in your backend.

- You will need an **internet connection** for the synchronisation or your occupancy status cannot be sent to the server.

  > **Tip:** If you only have a slow internet connection, we'd recommend setting the synchronisation interval to less often (e.g. every 1 or 2 hours) to save some bandwidth. Please note that this will heighten the risk for overbookings.

- Using the Online Booking System also requires an **additional agreement** that regulates the conditions for receiving incoming online bookings. You can download this agreement in your Lodgit account and send a signed copy back to us.

Unlock the Online Booking System

When you are using the work database in Lodgit Desk and select *File > Synchronise* for the first time in the menu bar, the following information will pop up:
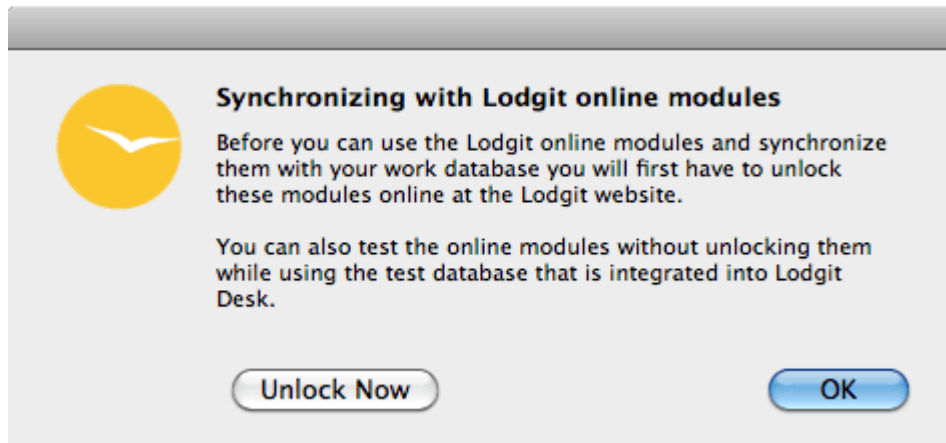
Please press "Unlock Now" which will then forward you to the customer log-in area.

This is where you can access your personal area at the Lodgit website. You can do so by logging in with your personal username and password that you received when you registered for a Lodgit Desk user license.

After you have logged in, open the page "Additional Modules" where you should press the button "Apply" next to "Online Booking Systems". This will prompt you to download the license agreement, print it, sign it and send it back to us. When we receive the signed license agreement, we will immediately unlock the Online Booking System for you.

Preparing the units for the first synchronisation

Which units will be synchronised?

You've fulfilled all the requirements and now you're ready to set everything up. What now? First, you have to decide which units you want to synchronise. To do that, go to *Administration > Synchronisation and Online Modules* then go to the tab *Synchronise*:
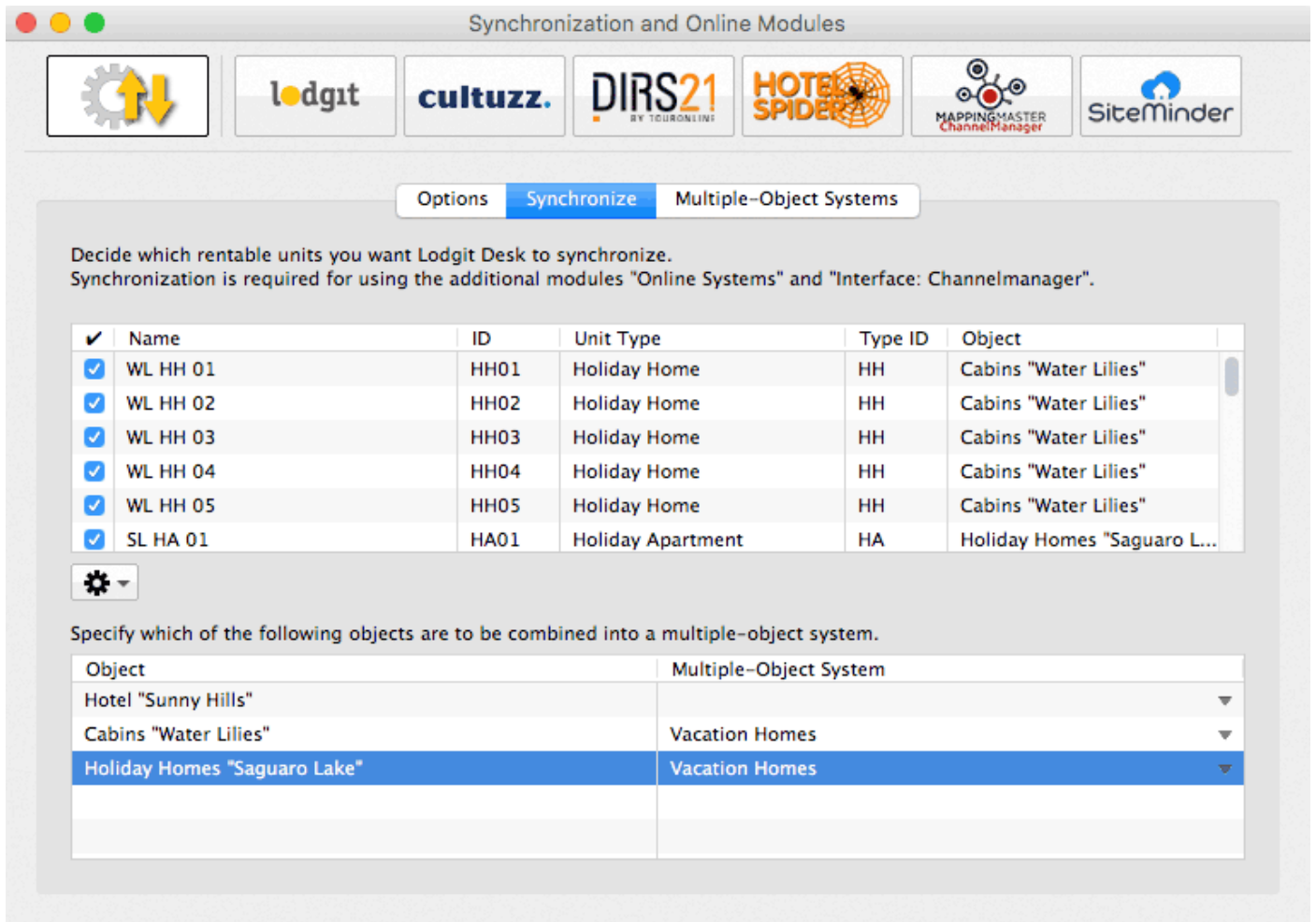
Only units that have a checkmark in the first column will be synchronised.

> Important: The default synchronisation setting for newly created units is always OFF. This helps make sure that you don't accidentally exceed your allotment by adding a new unit later on. Whenever you add a new unit that you also want to synchronise, make sure to activate it for synchronisation in this window.

Settings for the Synchronization

After you have set up which rentable units you want to synchronise and in which objects / systems they are to appear online, you can now head over to the general settings for the synchronisation process.

Switch to the tab *Options*, or if you closed the window, go to *Administration > Synchronisation and Online Modules* and then click the tab *Options*. Here, you'll be able to get to those general synchronisation settings:
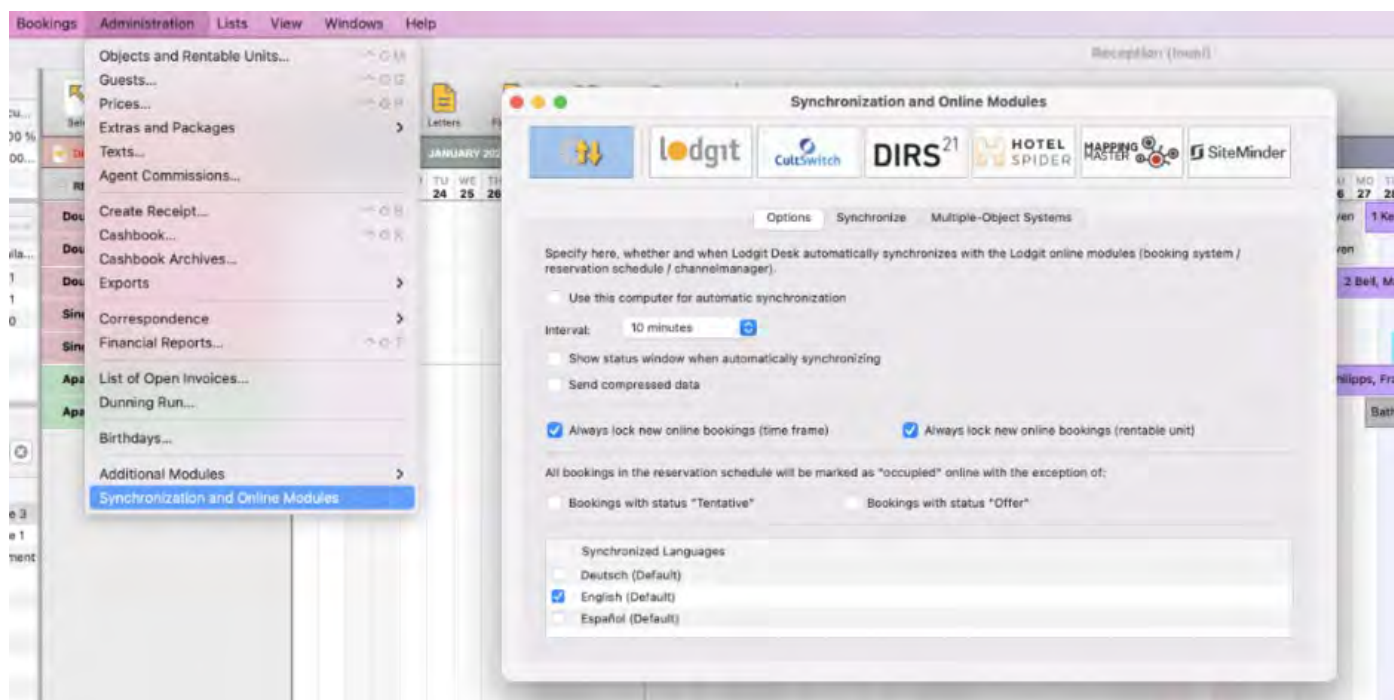
Here you can decide:

1. ... whether the computer should **synchronise automatically**. If you're using the database server you can do this separately for each computer so you may select the computer with the best internet connection for the synchronisation process.
2. ... in which **interval you want to synchronise**. You can choose between every 10 minutes up until once per day.
3. ... whether during the synchronisation **a status window is displayed**. If you synchronise often, this window may annoy you and can be disabled here.
4. ... whether the **data should be sent compressed**.
5. ... whether **new online bookings are automatically locked**. This is a safety measure to prevent you from accidentally moving the booking around. You can always unlock a booking in the upper left corner of the respective booking window (double-click on the booking). If you don't want the bookings to be automatically locked, you can turn that feature off here.
6. ... whether some **booking statuses are shown online as 'vacant'**. Units with bookings 'Tentative' and/or 'Offer' can still be booked online if you check the boxes in this area.
7. ... what **languages** you want to synchronise. You always have to synchronise at least one language; but you may synchronise all of the ones you added as well. The guest will be able to select the language via a drop down menu or you can set up a link attribute to use a preset.

The first Synchronization

Now you can send the data from your Lodgit Desk installation to the server for the first time. Go to *File > Synchronise…*. You'll have to synchronise twice the first time around: During the first synchronisation, the system is activated and during the second synchronisation, your objects, rentable units and occupancy status are transferred.

After the objects, rentable units and occupancy data were transferred, you'll automatically be informed by a pop-up window that there some required details that you still have to fill in before you can use the system:
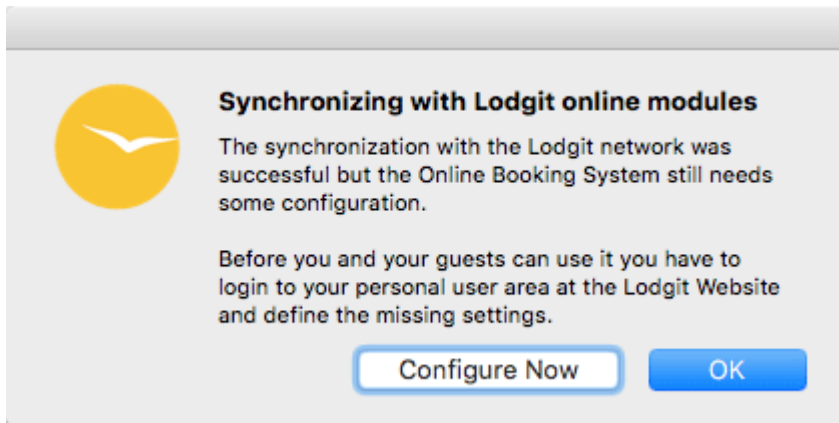
Among these are payment methods as well as general terms and conditions and your cancellation policy. Click on the button *Configure Now* to be forwarded to your account on www.lodgit.com and log in.

Please note: If you've tried out the Online Systems with your demo database before, that demo data will now be replaced with your actual data.

Multi-Object Systems (optional)

In Lodgit Desk you can sort your units into several objects. This will keep them separate in the Statistics so that it's easier for you to distinguish between different houses or unit types. The Online Booking System can only be generated for an object or a single unit. With the **multi-object system** you'll be able to **display more than one object in one and the same Lodgit Online Booking System**.

Guests will be able to book several units over these objects and they will see all available units during their search time frame. In the backend of Lodgit Desk however, these objects and statistics will continue to be kept separate.

If you want to create one of more multi-object systems, go to *Administration > Synchronisation and Online Modules* and click the tab *Multi-Object Systems*:
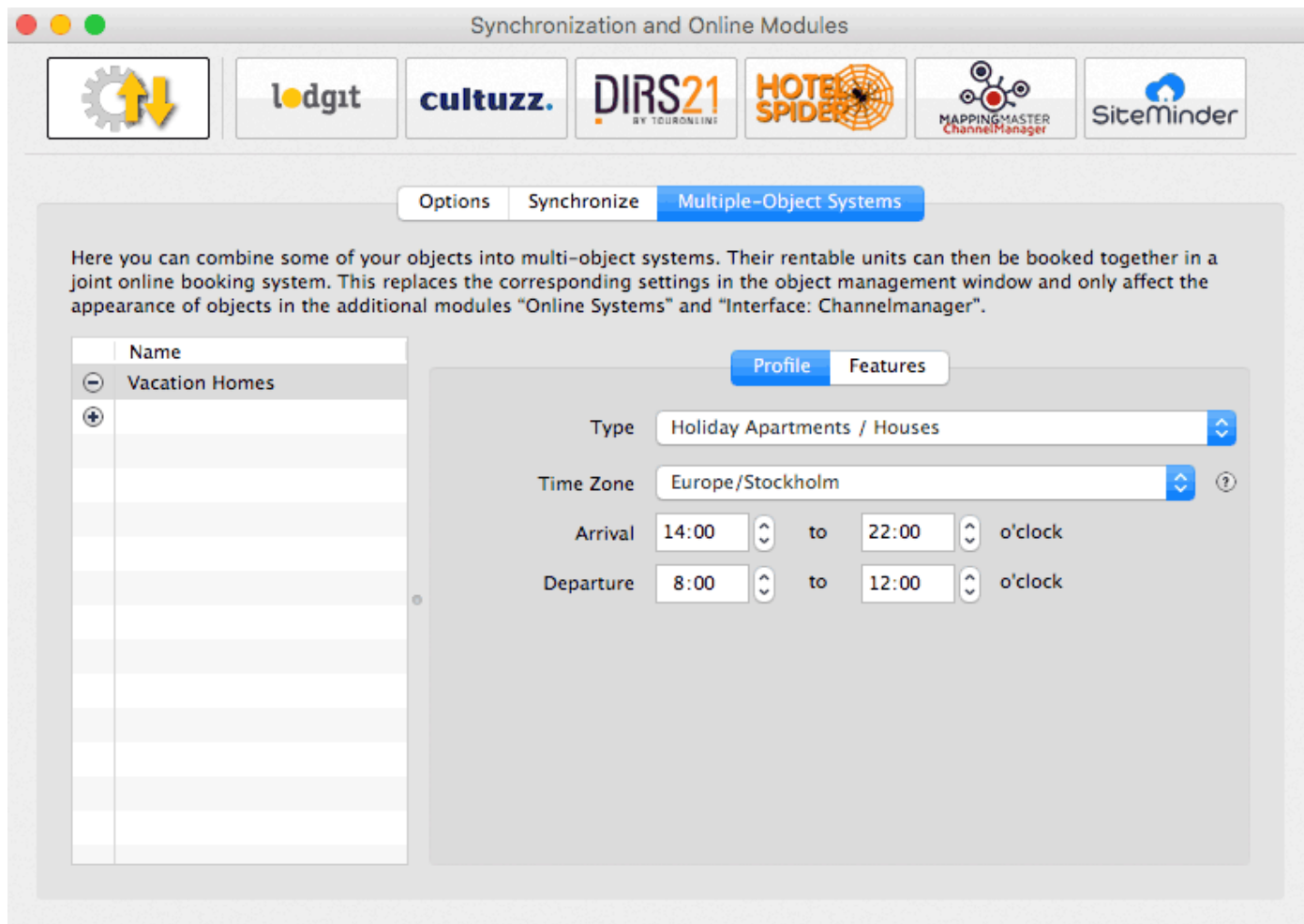
Use the plus button in the list on the left to create a new multi-object system. You will have to enter some of the profile information: accommodation type, time zone, arrival and departure times as well as the features of the object.

After you have finished setting this up, you can go back to the tab *Synchronise* and take a look at the lower table. In the right column, you can select if an object you created belongs to a multi-object system:
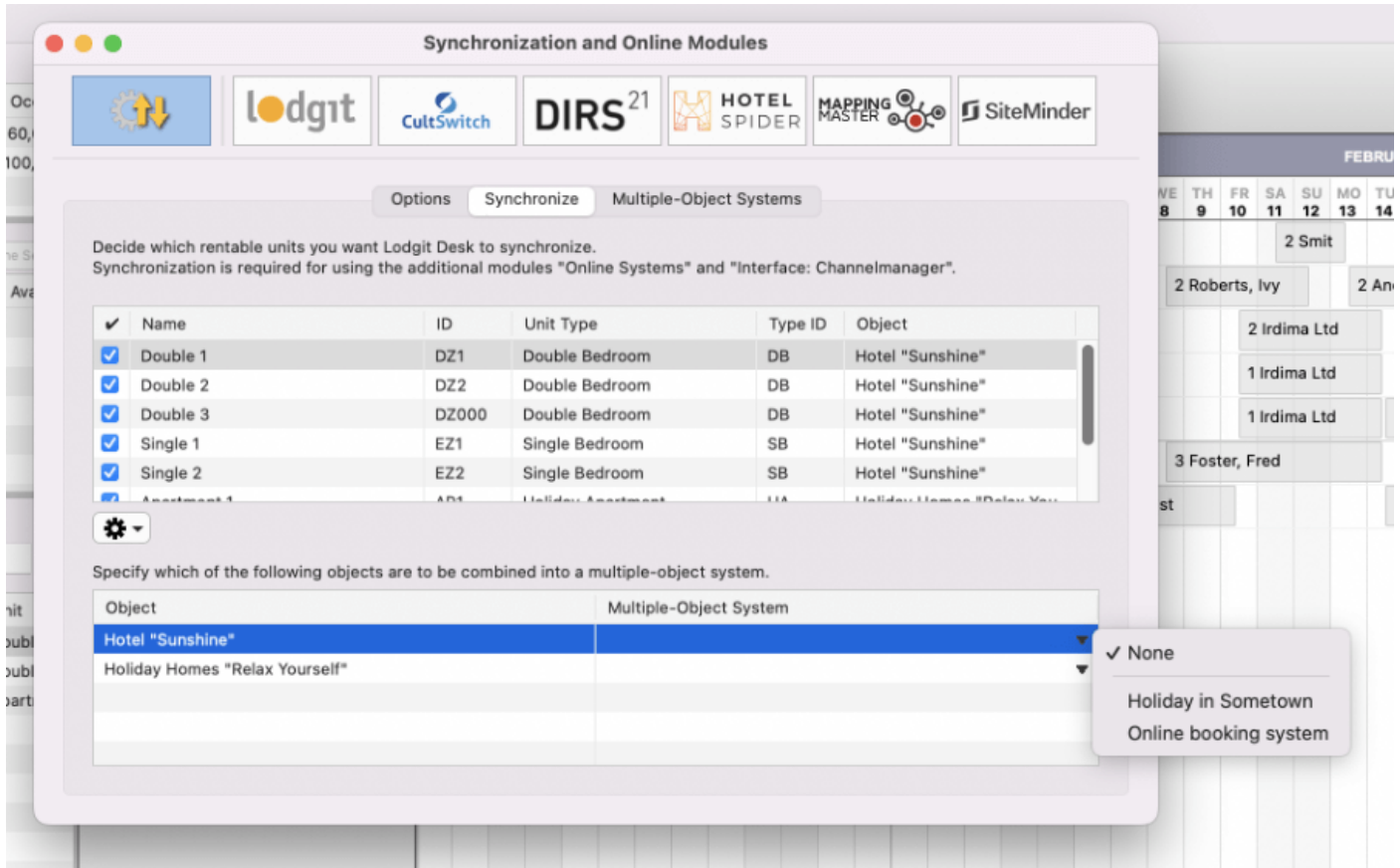
If you don't select anything in the right column here, the object will be treated the same way as you've originally set it up in the Object Management.

> Important: The Lodgit Online Booking System allows your guests to book multiple units in one go (group bookings). If you've set up a multiple-object system, your guests will naturally be able to book several units across all objects contained in the system. Please make sure this is something you want the guests to be able to do. If you're uncomfortable with that prospect, please offer the units in separate Online Booking Systems

Try the Online Booking System with the test database

You can try out the Online Booking System without having to sign the additional agreement. To do this, proceed as follows:

1. **Windows:** File > *Use Test Database*
   MacOS: File > *Use Test Database*
2. Activate the synchronisation for the rental units (*Administration > Synchronisation and Online Modules > Settings > "Synchronise > Select* "Synchronise all rental units" in the gear menu below the list of rental units.
3. **Windows:** File > *Synchronise*.
   Mac OS X: File > *Synchronise.*

As described above for the work database - in your personal user area on the Lodgit website, enter the required minimum information.

> Note: When you **try out** the Online Booking System, you can only use it while you are logged into your personal user area on the Lodgit website.

Optional: online bookable packages

You can set up extra services and items for your guests to book along with the units online in the Object Management.

UPDATE LODGIT DESK VERSION ON ALL COMPUTERS   UP   PREFERENCES AND SETTINGS

Setting up the Online Systems

You can change your individual settings under Lodgit.com > *Online Booking System > Settings.*
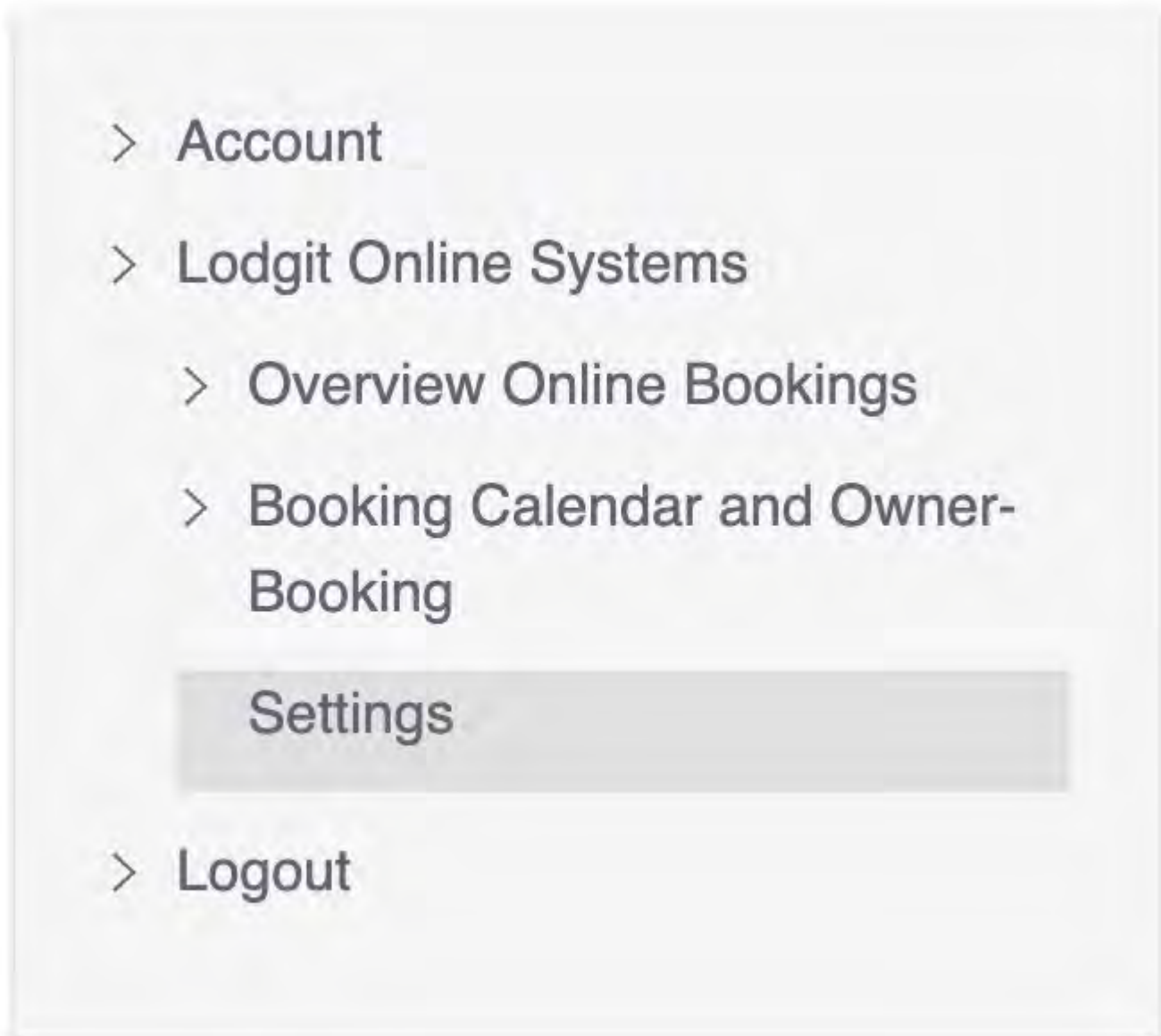
After the first synchronisation with Lodgit Desk, you will be notified of any **missing minimum information**.

Required Data

- **General Terms missing:** You have not yet added any general terms for this rental object. General terms and conditions are terms and conditions that must be accepted by a guest when making an online booking before completing the

ordering process.

- **Object Description missing:** You have not yet added a description for this object that a guest will see as a quick overview of the object when doing an online reservation. This description will be show on the first page of the online booking module.
- **Payment Methods missing:** For this rental object, it has not yet been determined which payment methods are available to a guest when booking online. You must specify at least one payment method per rental object.
- **Contact Information for online bookings missing:** For this rental property, you have not yet stored any contact details that will be sent to a guest after an online booking has been made. This address as well as contact information such as telephone and e-mail address will be displayed to the guest on the confirmation page and in the confirmation e-mail.
- **Cancellation conditions are missing:** You have not yet entered any cancellation conditions for this rental object. These will be displayed to the guest on the confirmation page and in the confirmation e-mail after the online booking has been made.

Important: Without the above listed data, the online booking system and the online booking calendar cannot be activated for the public. Please make sure you have entered all the required information.

Setting up the System: Options

Aside from the required information there are several other options for the Online Systems. With these you can adapt the online booking system and the online booking calendar to your personal website design and preferences.

Please note that most of the settings can be made globally for each property, but some settings can also be made individually for each rental unit (e.g. the Image Gallery).

Important: Because you can create an Online Booking System and Online Calendar for each property and rentable unit, you can (and must) make these settings individually for each of these generated systems and calendars!

In the following, we will explain the configuration process using our German booking page 'Hirschblick guesthouse' as an example:
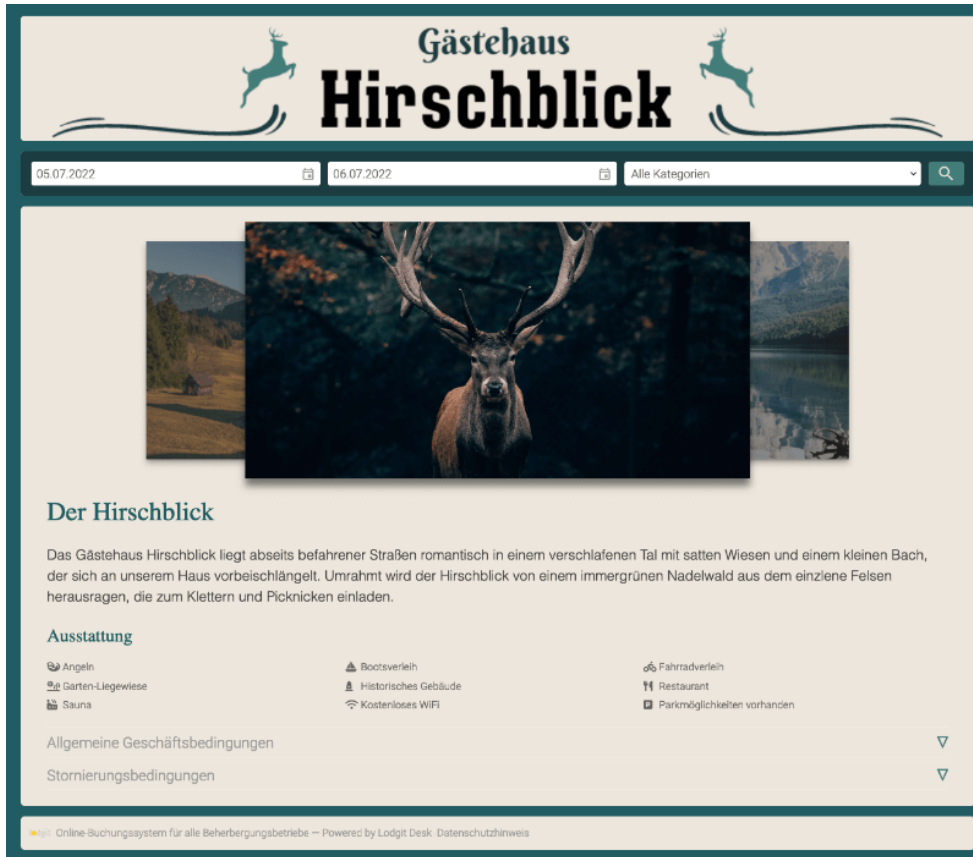
Selecting An Object or Rentable Unit

First go to Settings in your Lodgit account and select an object or rental unit under "Configure rental object" (here: object: Hrischblick guesthouse). In the drop-down menu "Display" you will find all configuration areas for the online booking system. Here you will also find the minimum information that you had to enter first (general terms and conditions, cancellation conditions, etc.). You can change, shorten or add to these later as you wish.

Texts that you enter here are usually displayed on the start page of the online booking system. You can also make some settings individually for each rental unit.
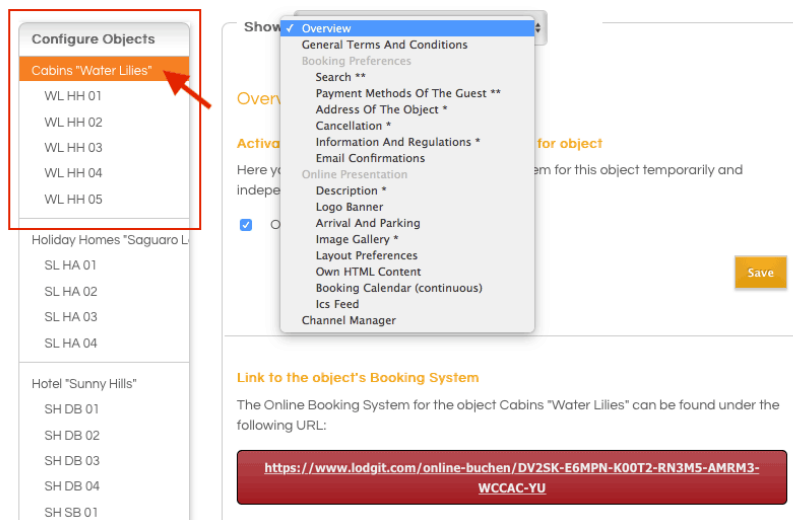
Overview

In the Overview area, you will find the link for the **online booking system** and the basic **settings imported from the Lodgit Desk installation:** the synchronised languages, time zone, minimum booking duration and specified arrival and departure days as well as their cancellation deadlines and the property's equipment features.

In addition, you can **activate and deactivate** the online booking system here.

> **Important:** Please make sure that you have checked the activation box if you want to use the Online Booking System for this object!

If you scroll down this page you will also find:

- Link to the booking system of the rental object
- Link to the quick enquiry of the rental object
- Code example for embedding the quick query in an iframe fro your website
- Settings taken from Lodgit Desk for your object (restrictions in arrival and departure, synchronised languages etc.)

General Terms and Conditions

This is where you can edit and publish your General Terms and Conditions. The GTC are part of the required information you had to add at the very beginning.

> **Important:** Before publishing, create the texts in all languages you want to offer! By clicking on the "Publish" button, the currently valid terms and conditions automatically become invalid.

Booking Preferences: Search

The *Search* area lets you define how you want the rentable units to be sorted when the search results are displayed, whether the name of the rentable unit will be listed

and what should happen if there are no vacancies in the chosen time frame.

Separately means that each unit is listed in the search results individually, which is best if your units all have individual pricing and features. ***Categories*** mode means that units you have defined to be in the same category in Lodgit Desk will be grouped together, which is best if you have a lot of units of the same type/price/features (e.g. 20 single rooms).
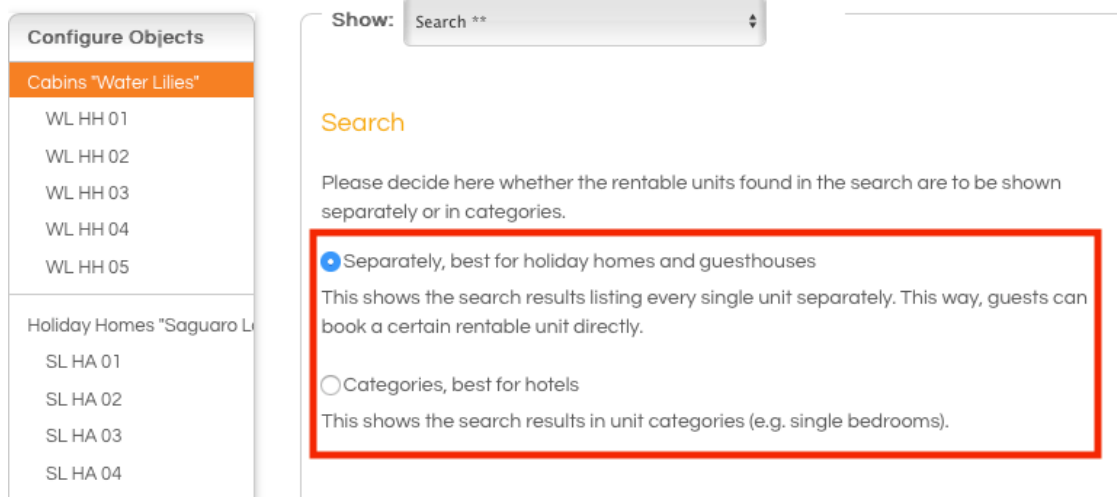
Show name of the rental unit: The name of the rental unit can be displayed in different places in the online booking system. Tick the places where you want to display the name. If you do not want to display the name at all, simply remove all the ticks.
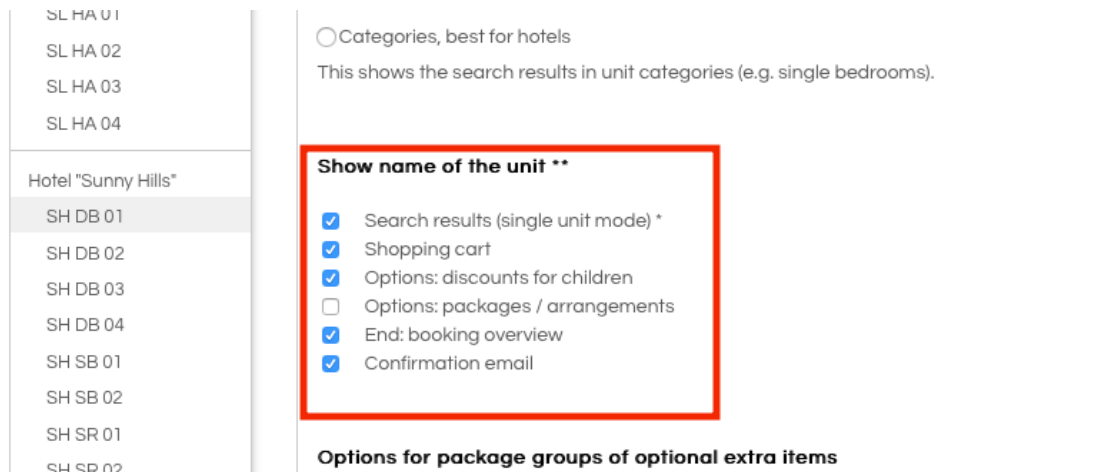
Options for package groups of optional extra items: If you make additional services bookable online and sort them into one or more selection groups, you can decide here whether the name of the selection group should be displayed as a title above the corresponding additional services.
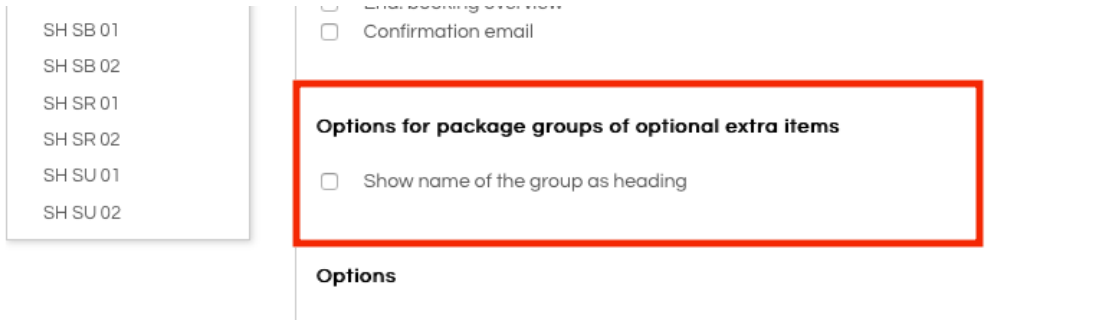
Options: When the rental units are displayed in the search results, the guest can view the details by clicking on the image to the left of the result (which you can enter in the settings for the rentable units). If you do not want this, remove the tick from this option. If there are no units available in a search period, you can show the guest an occupancy calendar so that he or she can possibly choose another period for his or her visit. You can define the display criteria for this calendar via the selection menus.
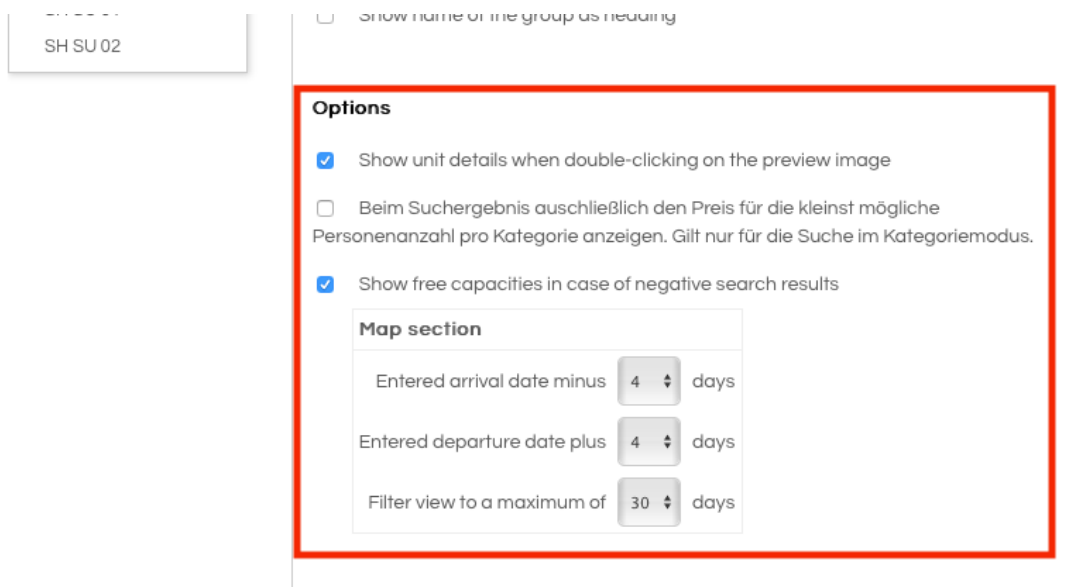
Booking Preferences: Payment Methods of the Guest

The payment methods are part of the minimum information for the online systems. Select at least one of the payment methods offered here: **Single debit from the guest's account, credit card, credit card via Paypal PLUS and via Unzer (formerly Heidelpay), transfer to your account, Paypal** or **payment on site**.

Important: Lodgit does not receive any payments from your guests. As the operator, you are responsible for collecting payments yourself. Therefore, only choose payment methods that you can use!

Under **Available until** you can determine how many days before arrival the customer can still complete their booking with this payment method. The **standard payment** target period specifies the payment target for the down payment. You can set the payment term depending on the day of booking or the day of arrival.

Time for payment: means the term during which you want to receive the deposit payment as a confirmation for the booking. You can set this as a time period of x days in reference to either the day of the booking or the day of arrival.

Deposit: For your own security, a deposit of at least 5% of the booking price is required for almost all payment methods. The only exception is the payment method **payment on site**.

Payment on site: With payment on site, there are no options for a deposit or the relevant payment term. By ticking the box **Only enable if no other payment method is available**, you can enable this payment method only for short-term bookings for which **no other payment is possible because the date is too close to the arrival:**

In our example, guests can pay in this way (here the option for credit card payment via Unzer or Paypal PLUS has not been activated), German language image below:

Booking Preferences: Contact Information

Here you can enter and edit your contact information. This information will be displayed to the guest in the provisional booking confirmation.

Booking Preferences: Cancellation Deadline

This is where you can define the deadline for a free cancellation. This will be displayed in the confirmation email with the exact date and time. If the deadline has

already passed (because the arrival date is too close to the booking date), no information about a free cancellation is listed.

Booking Preferences: Cancellation Policy

The cancellation policy is part of the required information you had to add at the beginning. This is where you can, at any time, further edit the text. The cancellation policy will be shown to the guest on the last page before the booking is completed as well as on the front page under "Legal Information".

> Important: Before you publish your texts, make sure you have added the texts in all languages. Once you hit the button "Publish", all currently valid cancellation policies will automatically become invalid and be overwritten.

Booking Preferences: Information and Regulations

Any additional information you add here will be shown to the guest in the provisional booking confirmation email they receive. You can use this to answer frequent questions and concerns ("What to do when there's nobody at the front desk?") or leave a note about future correspondence ("You will receive a binding confirmation within 24h after we have received the deposit payment.").

Booking Preferences: Email Confirmations

To be notified about new incoming bookings you can have **a copy of the confirmation email sent to your email account**.

If you would like to receive such a copy, tick the box **Receive booking confirmations**. A copy will then be sent automatically to the email address you have stored in the contact information. If you want to send this copy to additional email addresses, enter these addresses in the field below. Separate email addresses with a line break.

Online Presentation: Object Description

Here you can enter the property description that appears on the start page of the online booking system. For the description of individual rental units, please select the rental unit from the left menu and then select "Description".

> Important: Before publishing, create the texts in all languages you want to offer! By clicking on the "Save" button, the currently valid object description is automatically overwritten.

Online Presentation: Logo Banner

In this section you can upload a banner to be displayed instead of the standard header: The banner should have a size of 1280px x 168 px. Please note: The banner will be displayed in all language variants of your system and **cannot be adapted for individual languages**.

If you do not want a banner for your online booking system, you can select the design without banner in the layout preferences.

Online Presentation: Google Maps

To make it easy for your guests to find you, you can add a map section of your location in the online booking system. There is also the option of a route planner. This is displayed on the homepage under the heading "Arrival".

Online Presentation: Arrival and Parking

Other arrival information, e.g. times for check-in or also check-out, rail connections, directions and the like can be entered here. This information appears on the homepage under the heading "Arrival" (above the map).

Online Presentation: Image Gallery

In the picture gallery you can upload up to 20 pictures to give your guests a comprehensive impression of your accommodation. The image gallery will be displayed on the front page under "Images".

You can set one image to be the default image and it will be displayed on the front page next to the object description. Each individual image must not exceed 976 KB in size.

In addition to this picture gallery of the property, you can also add an individual gallery for each rentable unit which will be displayed when the guest clicks on the unit's icon in the search results.

This is how the gallery will look on the website:
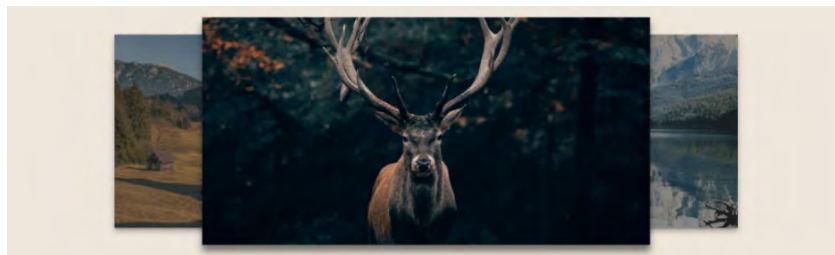
Online Presentation: Layout Preferences

In the *Layout Preferences* you can adjust the look of the Online Booking System and the Quick Search individually with CSS to make it fit seamlessly into your website.

Simple CSS Settings

Here you have the possibility to easily and quickly change various design aspects according to your wishes. For this purpose you will find a set of simple tools that allow you to customise three colours, font, background, header and search form. When choosing the three colours, you could use the same RGB specifications or hex code to match your corporate colours.

Expert CSS Settings

Important: Please note that only an experienced web designer should change the CSS settings because unsuitable CSS styles can compromise the functionality of the Online Booking System! Should you not have a web designer on hand, feel free to contact us and we'll make you an affordable offer for the adjustments you need.

Select here which design template you want to customise. You can choose if you want a header for a logo/banner, if the search box should be in the top center or on the left side and if the header should be optimised for a logo (rather short) or for a banner (rather wide).
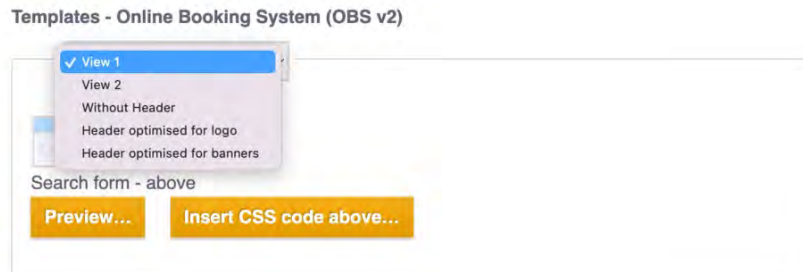
When changing the CSS styles, note that all values are commented out by default to avoid unwanted changes. To activate the individual tags, please delete the characters /* before and */ after the respective line.
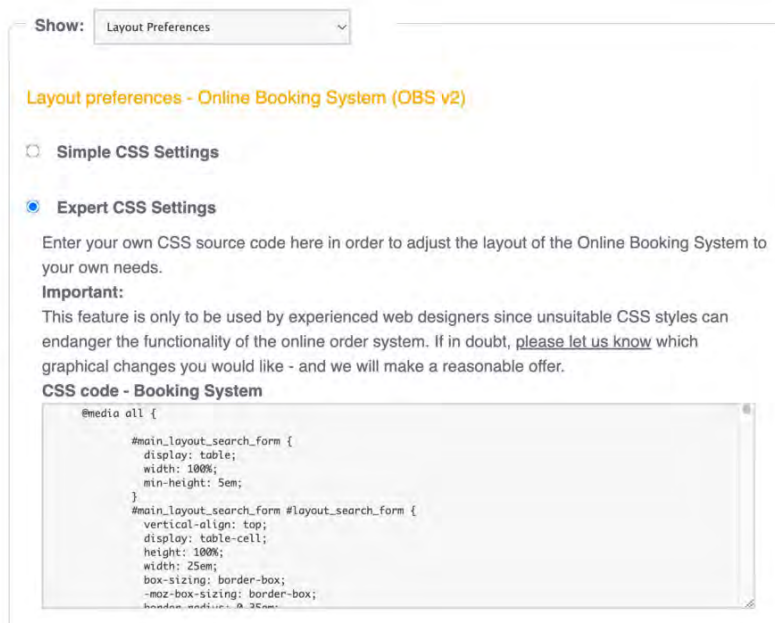
Online Presentation: Own HTML Content

Important: Before you publish your texts, make sure you have added the texts in all languages. Once you hit the button "Publish", the current HTML content text(s) will automatically become invalid and be overwritten.

In the online booking system, you can still insert additional texts so that, for example, links back to the website or important seasonal information catch your customers' eye better.
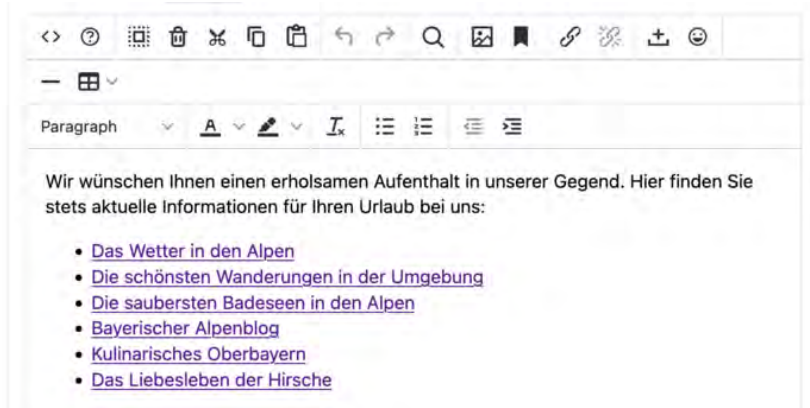
This self-created content is displayed under the heading "Additional information". On our example page, this then looks like this:
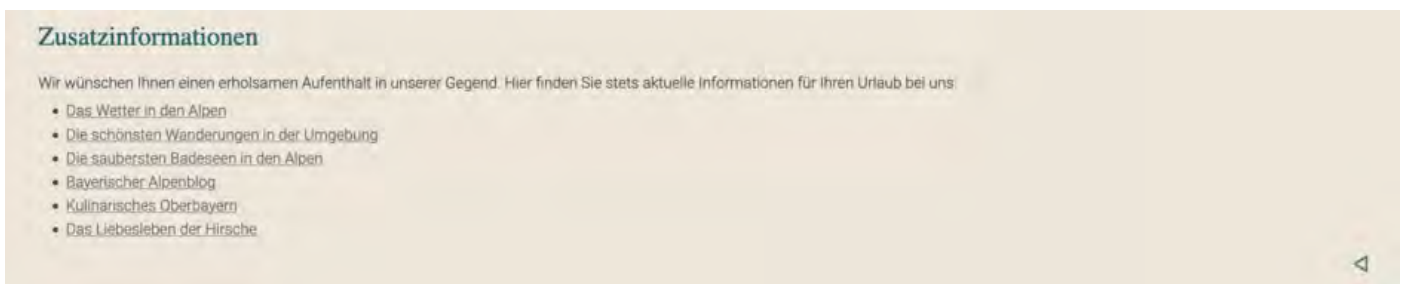
Online Presentation: Booking Calendar (continuous)

The continuous Booking Calendar displays the vacancies in an object (with all its rentable units) with a time line:
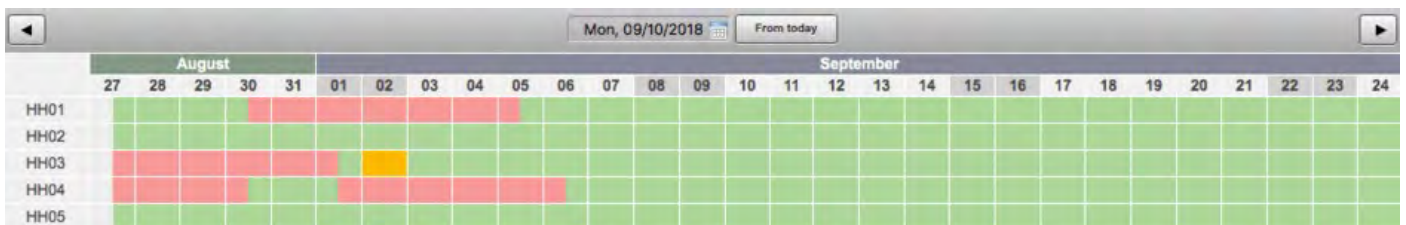
Vacancies are green, occupancies are red and everything in the past is grey. You can link to the continuous Booking Calendar or integrate it into your website in an iFrame with the code snippet provided.

For individual units you can also generate a monthly calendar view to integrate in your website.

> Important: Please make sure that the activation box is checked if you want to use the continuous Booking Calendar!

ics Feed

Here you can find the ics feed of the rental unit, activate and deactivate it, and update it manually. The feed is updated automatically at certain intervals. Feeds must be activated individually for each unit.

If you want to include the feed in another channel, e.g. airBnB or 9flats, you

have to include it as an ics or other feed. The ics feed (Ical feed for Mac) sends the changes to the channel. The feed must be retrieved from the channel at regular intervals. This only happens if it is also integrated as an ics feed.

Note: At traumferienwohnungen.de a modifier has to be activated to interpret the ics feed correctly. Please point this out to your customer advisor for traumferienwohnungen.de!
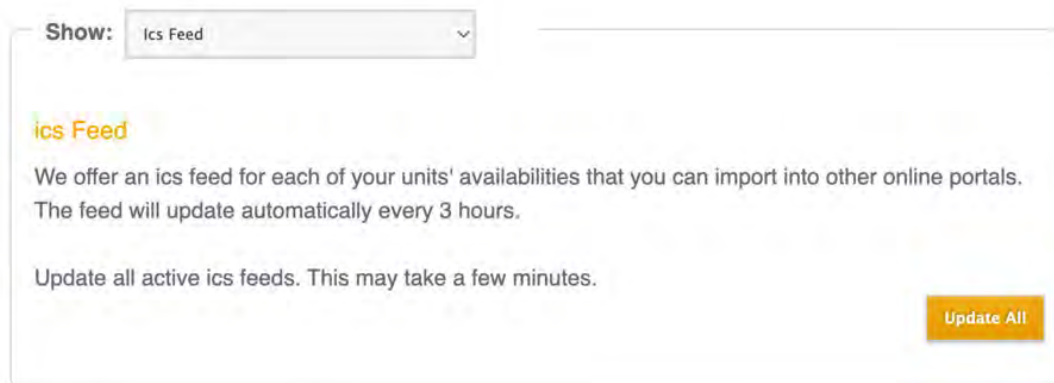
Individual Settings for Single Rental Units

There are some options that you can define individually for each rentable unit. General information or options that concern the entire object, such as payment methods, route planer, or terms and conditions, can be defined in the Global and Object Options.

Overview

This is where you can find a link for this unit's booking tool and check which feature settings were imported from Lodgit Desk.

Description

Here you can define a description and a preview picture for each individual rental unit. The preview image is displayed next to the rental unit in the search results:
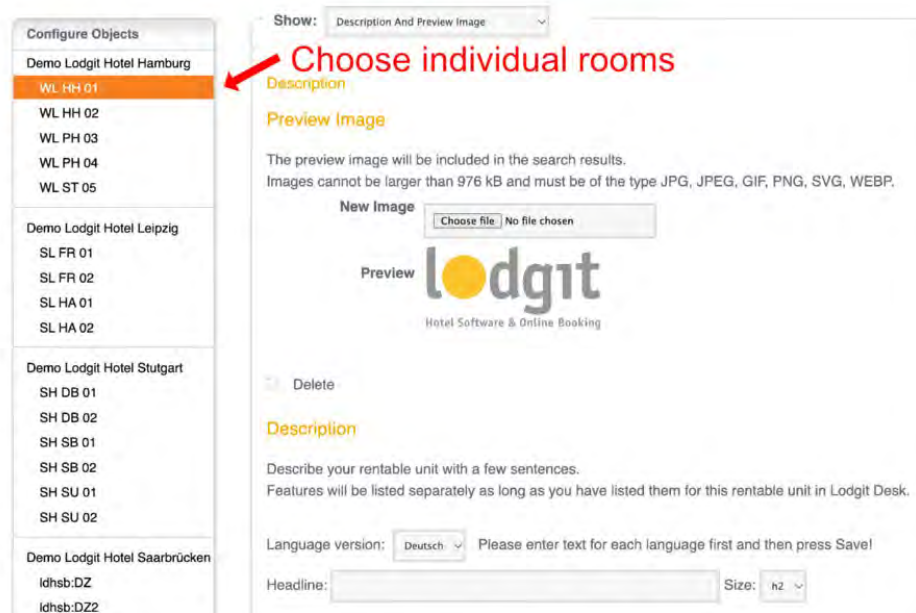
With uploaded photos and a short description, it looks like this in our example:
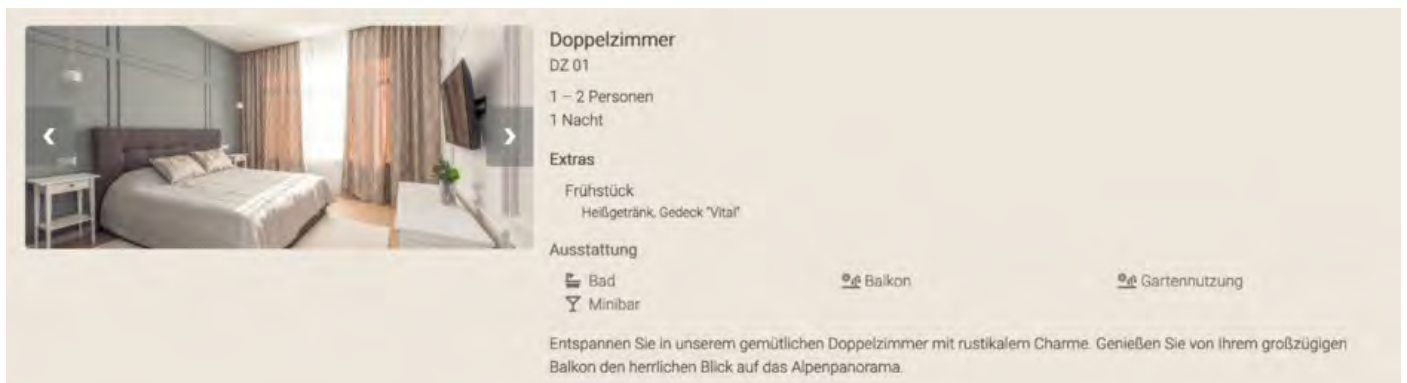
Limit Child Discounts

Some units may have discounts for children with a certain percentage of the full price (e.g. children up to 13 years pay only 50%). Here, you can decide how many full paying guests have to stay in the unit to allow those discounts to be attributed to other guests.

Image Gallery

Here you can upload pictures of the rental unit and set a default picture. The standard picture is displayed next to the description when you click on the preview picture. The guest can see the other uploaded pictures (up to 10) in the "Images" tab.

Integrate A Booking Calendar Into Your Website

For individual rental units, you can also display the free periods in the form of a calendar on your website:

Vacancies are green, occupancies are red and everything in the past is grey. You can link to the monthly Booking Calendar or integrate it into the website in an iFrame with the code snippet provided.

> Important: Please make sure that the activation box is checked if you want to use the monthly Booking Calendar!

ics Feed

This is where you find the address of the feed, activate and deactivate it. You can also manually update it here, although it's not necessary: The feed will update itself automatically in regular intervals. When connecting the feed with another channel such as airBnB or 9flats, make sure **to connect it as a *ics* or *Other feed***. This is **NOT an ical feed** that pushes changes to the channel. Rather, the channel has to call the data from the feed, which only happens if it is also included as an ics feed.

Other Settings In Lodgit Desk

Booking Restrictions

The Lodgit Online Booking System allows you to set a minimum length of stay

(MinLOS) as well as specific arrival and departure days.

Minimum Length of Stay (MinLOS)

In order to set a MinLOS for Lodgit online bookings, open Lodgit Desk and go to *Administration > Synchronisation and Online Modules* and then click the *lodgit*-Button in upper line:
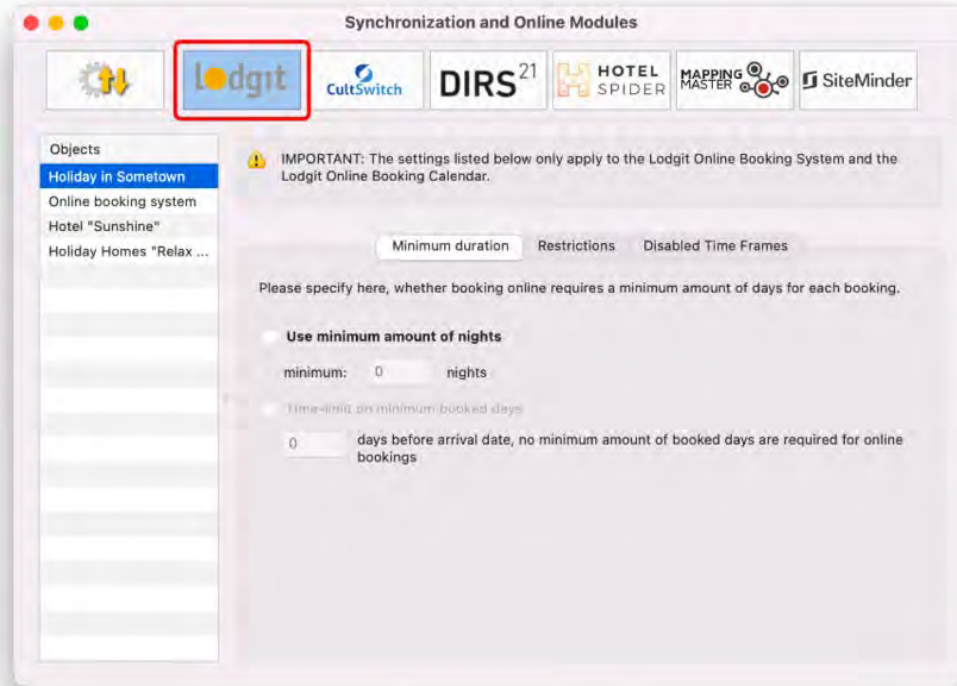
You can set a minimum number of days for each booking. If you want short notice bookings to not have to abide by those rules, you can set a time-limit for that restriction.

In the example above, the minimum length of stay is seven days. If the guest books 15 or less days before the arrival, however, then the restriction of MinLOS no longer applies.

Set Arrival and Departure Days

In order to set a specific arrival and departure weekdays for Lodgit online bookings, open Lodgit Desk and go to *Administration > Synchronisation and Online Modules* and then click the *lodgit*-Button in upper line:
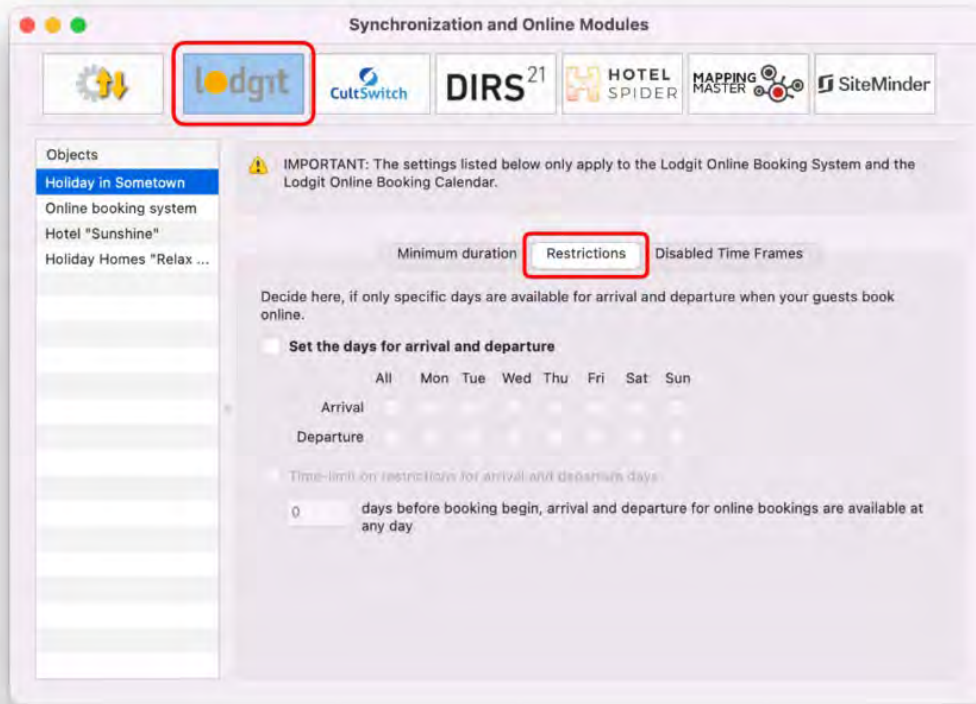
Allowing only specific weekdays for arrival and departure of guests can also simulate a MinLOS of sorts. Select the dates you want to allow arrivals and departures. If you want short notice bookings to not have to abide by those rules, you can set a time-limit for that restriction.

In the example above, guests can only arrive on Saturdays and leave on Fridays. This doesn't change for guests, even if they're 'last minute' bookers.

Stop Sell / Disabled Time Frames

As a general rule, all units that have bookings in them will count as 'occupied' online. Exceptions are bookings with the status 'Checked Out' and 'Cancelled Online Booking' as well as the statuses you exempted from being shown as occupied. But you can also block single units, an entire unit category or your entire object from being booked online in a certain time frame, e.g. because it's the low season and you'd rather take bookings over the phone or via email.

In order to set up a stop sell (disabled time frames) for units, open Lodgit Desk and go to *Administration > Synchronisation and Online Modules*, then click the *lodgit-*Button in upper line and then switch to the tab *Disabled Time Frames*:
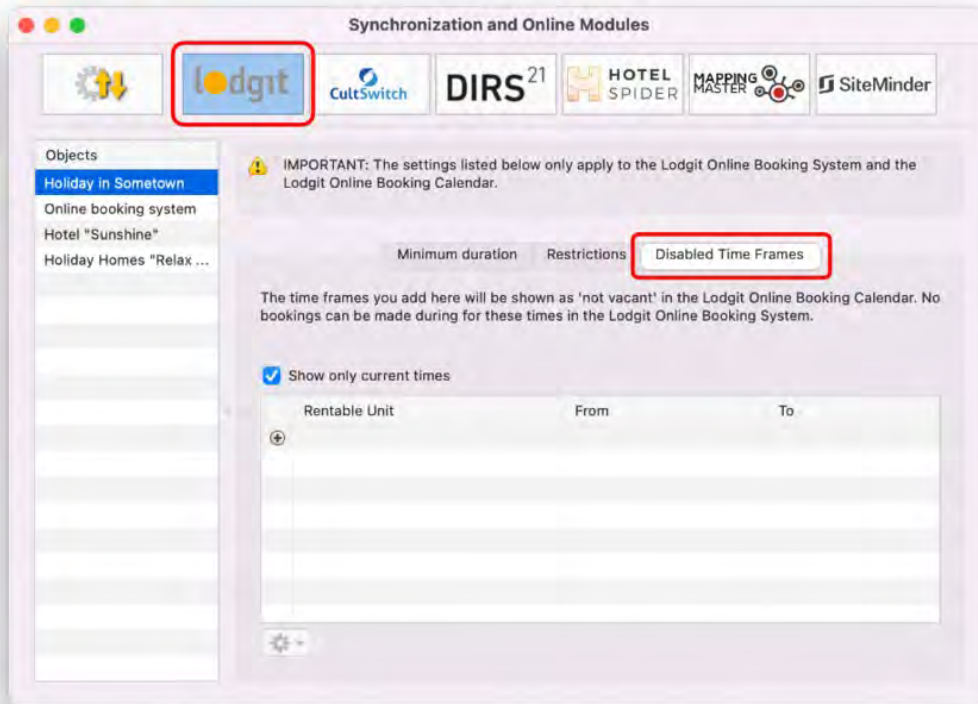
Use the plus button to add a new entry. In the column *Rentable Unit* you can select the unit(s) you want to block online. In the columns *From* and *To* enter the dates for the stop sell. You can block either *All rentable units* (1), *one specific unit* (2) or *all units of a certain category type* (3).

If you select an entry you can quickly duplicate it via the right-click or Actions menu in the lower left corner to make subsequent entries easier.

Synchronised extra items

With the Lodgit Online Booking System, you can make as many of your extra items available online so that guests may book them directly when they book their stay with you.

First, you have to go to *Administration > Extras and Packages* and then switch to the tab *Packages*. Here you'll have to create a package for each extra item and/or each combination of extra items that you want to offer online:
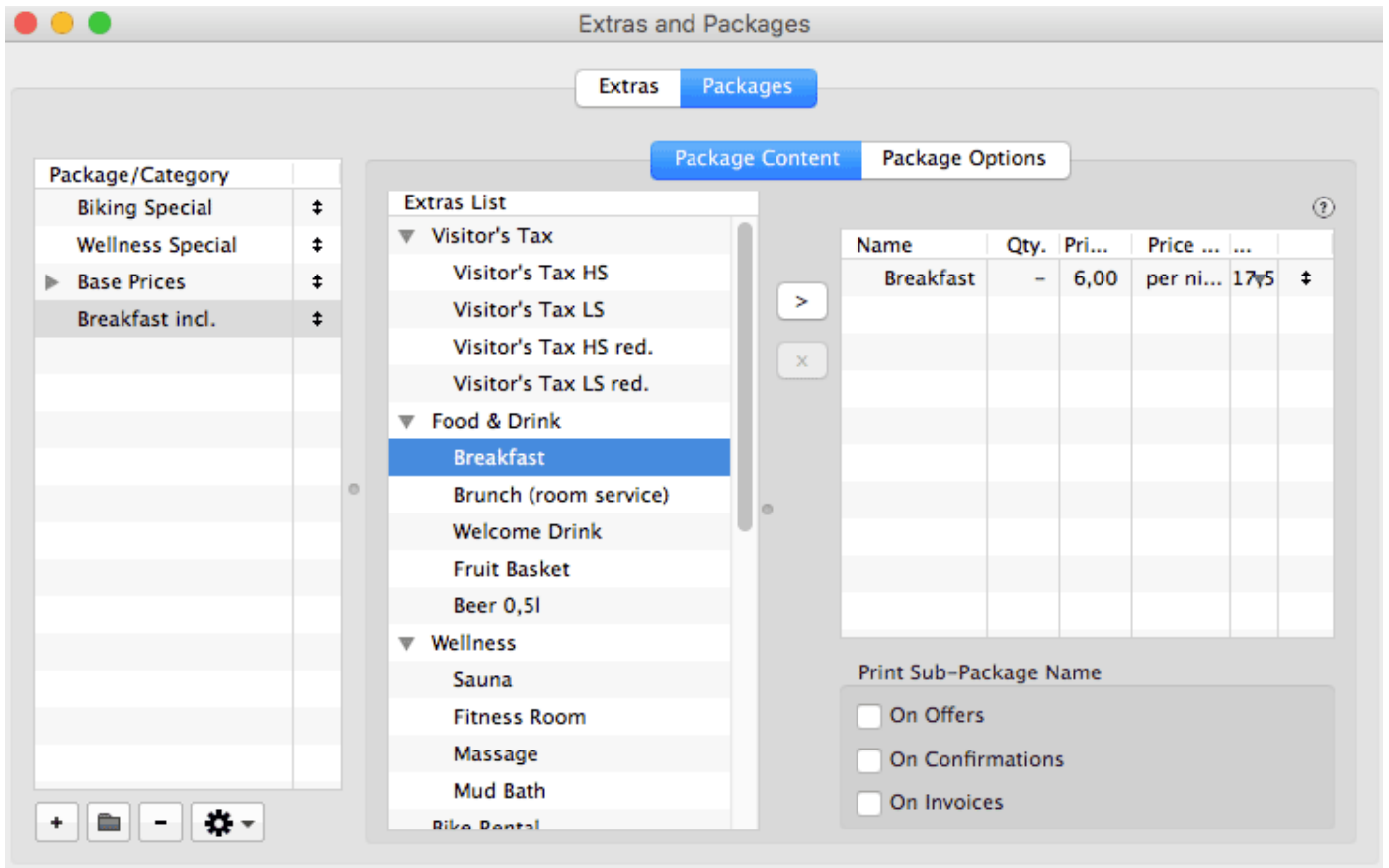
In this example, we've added the extra item 'Breakfast' to the package "Breakfast incl.". In the tab *Package Options* you can now make sure that the package is inclusive:
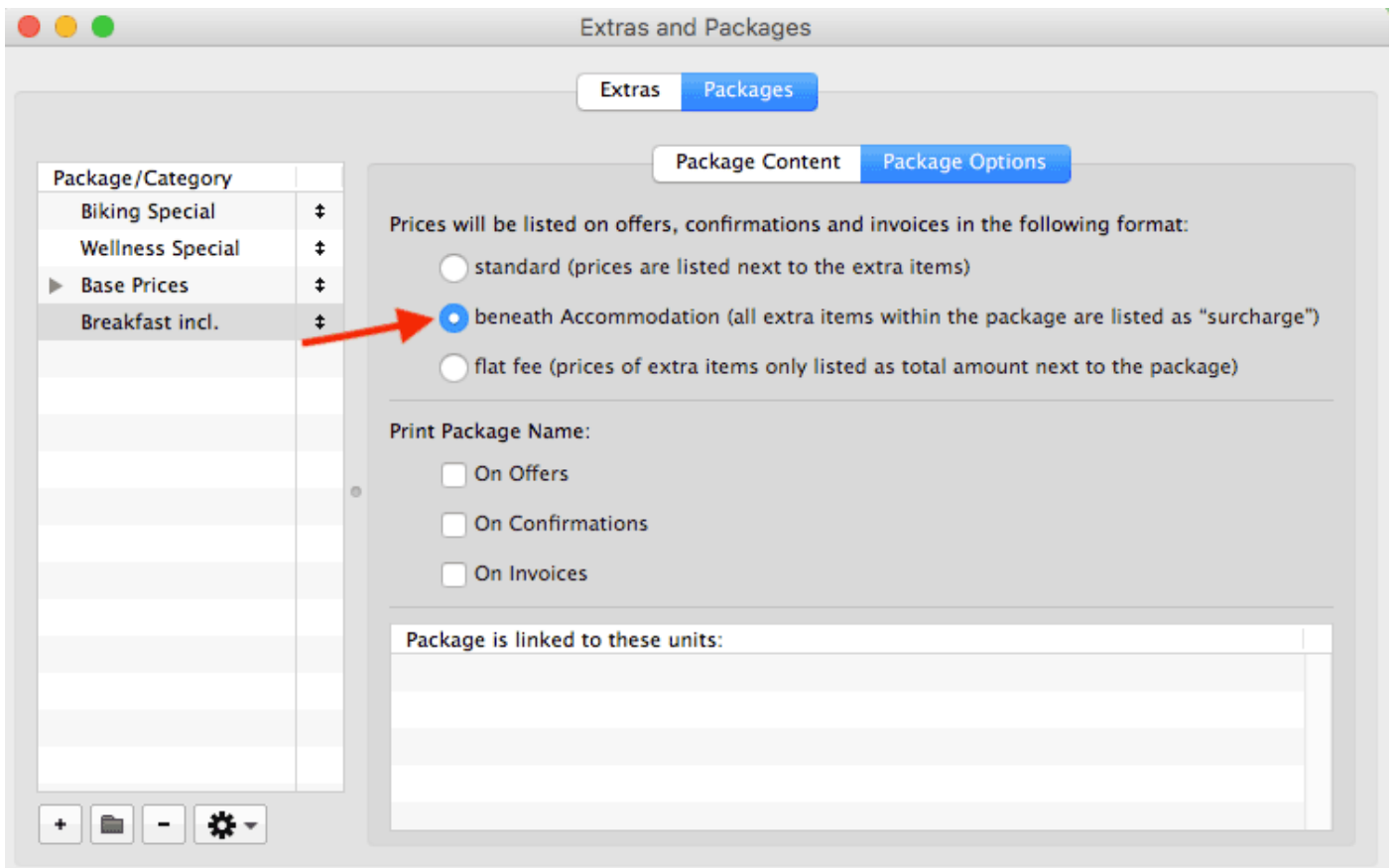
> **Tip:** If you have a package that contains more than one extra item, it's best to select "Print Package Name on Offers". This way, the package's name will also be displayed in the Online Booking System.

Now go over to *Administration > Objects and Rentable Units > Rentable Units*. Open the rentable unit that you want to add the package to by double-clicking on it and then go to the area *Extras / Packages*:

Go to the tab *Bookable Online* to decide which packages you want to offer online. Check the box in the column *Bookable* to activate them.

If the package has the attribute "inclusive", it will always be added automatically to the booking (see 1). Otherwise you have the option to decide whether it is automatically added or an option for the guest (see 2).

You can also sort packages into a *Group*. The packages within such a group cannot be added to the same booking. This can be used to offer different food options (breakfast only, half-board or full-board) or transfer options from and to the guest's destinations (from/to the airport, from/to the train station or from/to the port). Put these packages into a group via the menu in the far right column and the guest can choose between them or select none.

The extra items can be booked by the guest after they've entered the ages of the guests (if applicable due to child discounts):

Automatically added inclusive extra items are listed at the very top without their price (see 1). Optional packages are listed below that and can be selected by checking the respective box (see 2). And below that you'll find the packages that belong to a group; if you offer more than one group, each group has a small border drawn around it so guests know which they can choose from. The title of the group can be displayed as a heading for each box.

ONLINE BOOKING SYSTEM   UP   SYNCHRONISE EXTRA ITEMS

Synchronise Extra Items

You have the option of making as many of your extra items created in Lodgit Desk available online. Interested guests can book these directly.

To do this, first go to ***Administration > Extras and packages* > Packages**. Here you first create a corresponding package for each extra item and/or extra item combination that you would like to offer online.

Please note that only packages are available online. A package can therefore only consist of one extra item.

> **Tip:** For any changes to appear in the OBS you have to sync **Lodgit desk > File > Synchronize**.
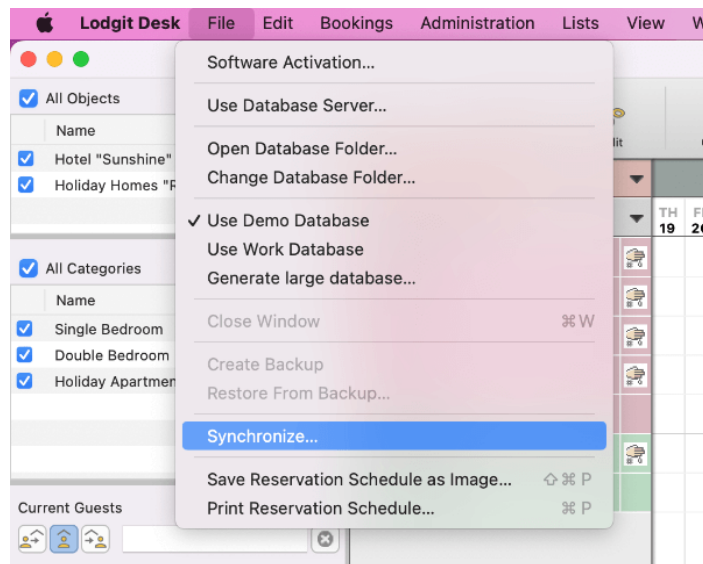
1. Including Extra Item Packages

In our example, the extra item has been added to the "Bike Rental" package. Under Package Options you can now specify that the package is included in the price (by choosing the middle option: 'beneath Accommodation'):
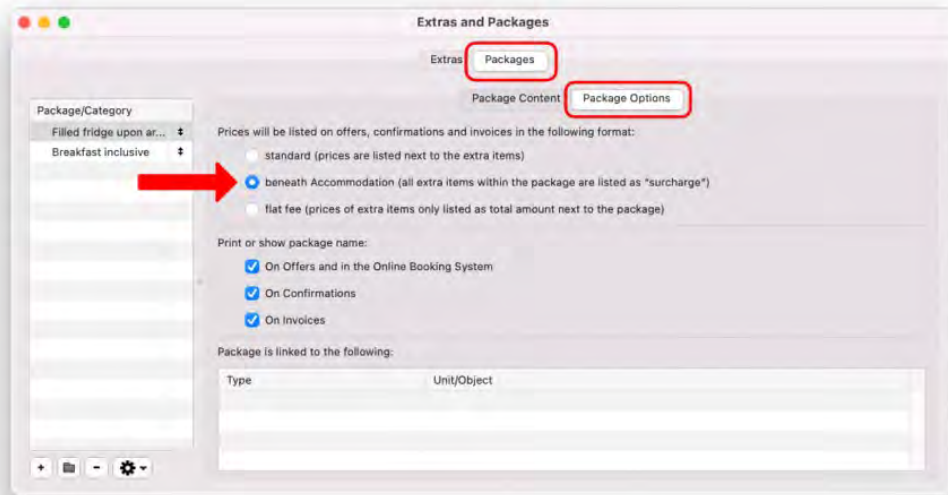
> **Tip:** In the case of packages with several extra items, it is advisable to also print out the name of the package in offers, as this will then also be displayed in the online booking system.

Now go to ***Administration > Objects and Rental Units > Rental Units***. Open the rental unit to which Breakfast can be added online by double-clicking and then go to the Extra Item Packages area. Place a tick next to the extra item. The Breakfast is now automatically added to the accommodation service using the settings from the package management.
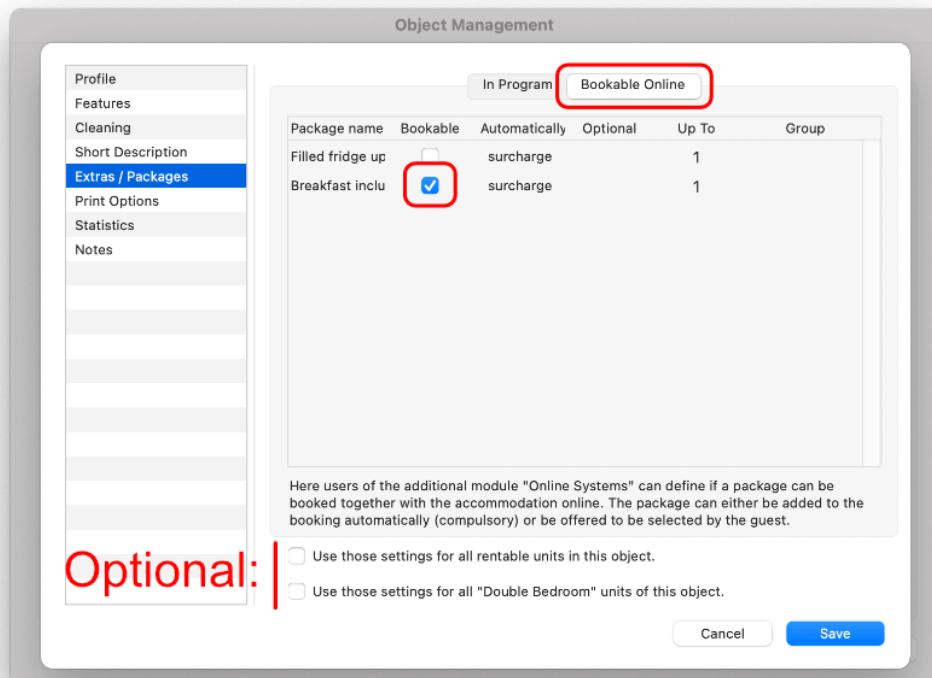
For your guests, it looks like this during the booking process (German image displayed):
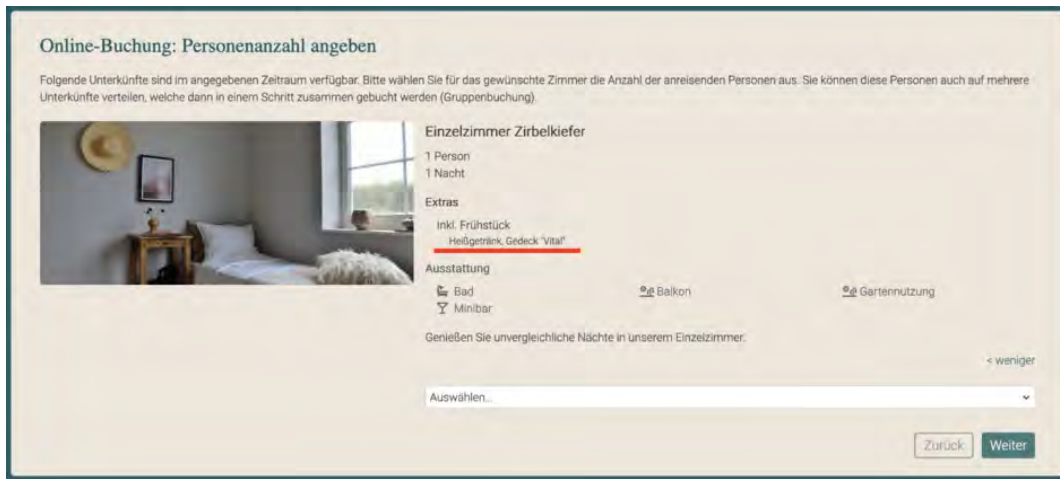
And this is how it looks in the checkout window (German image);

You can also automatically add extra items for the booking module. Then, in contrast to the inclusive item, the price for the total duration appears in the shopping basket on the left. Your guests **cannot deselect** this extra item.
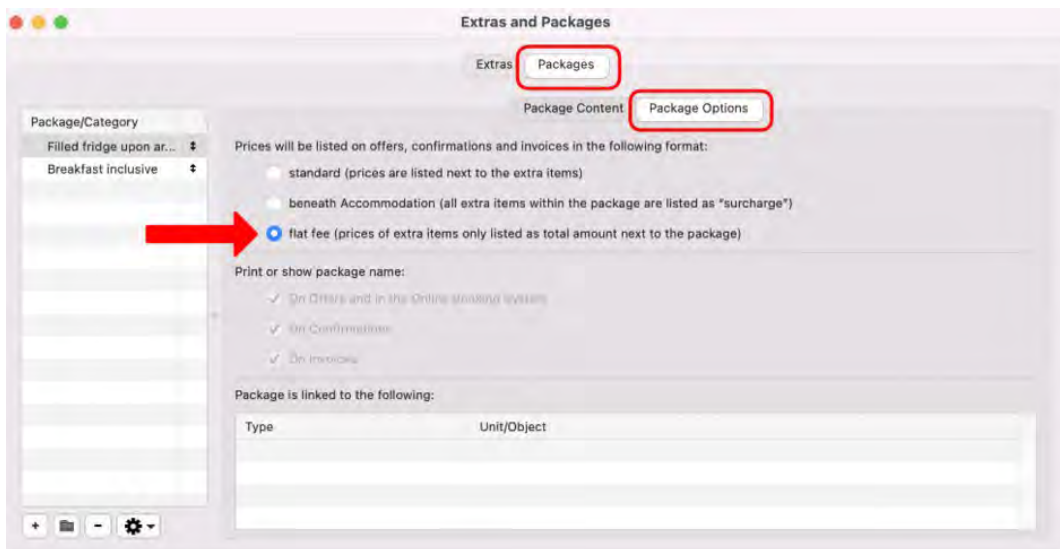
For configuration, click on the options bookable and automatic under *Object management > Rental units > Extra item packages*.

On the Booking page the option now looks like this (German image):

2. Freely Selectable Extra Item Packages

Extra items can also be configured so that they are freely selectable. First create another extra item package under *Administration > Objects and Rentable Units*. Then go to *Object Management > Rental Units* and double click on the room name you wish to edit, then in the next window that opens, click '**Extras / Packages**', then choose the column '**Bookable Online**'. Choose the options between bookable and optional, depending how you'd like it set up. If you wish, you can enter up to a possible number (1-10) of bookable extra items in the column. Create a meaningful selection group whose name will then be displayed during the checkout process.
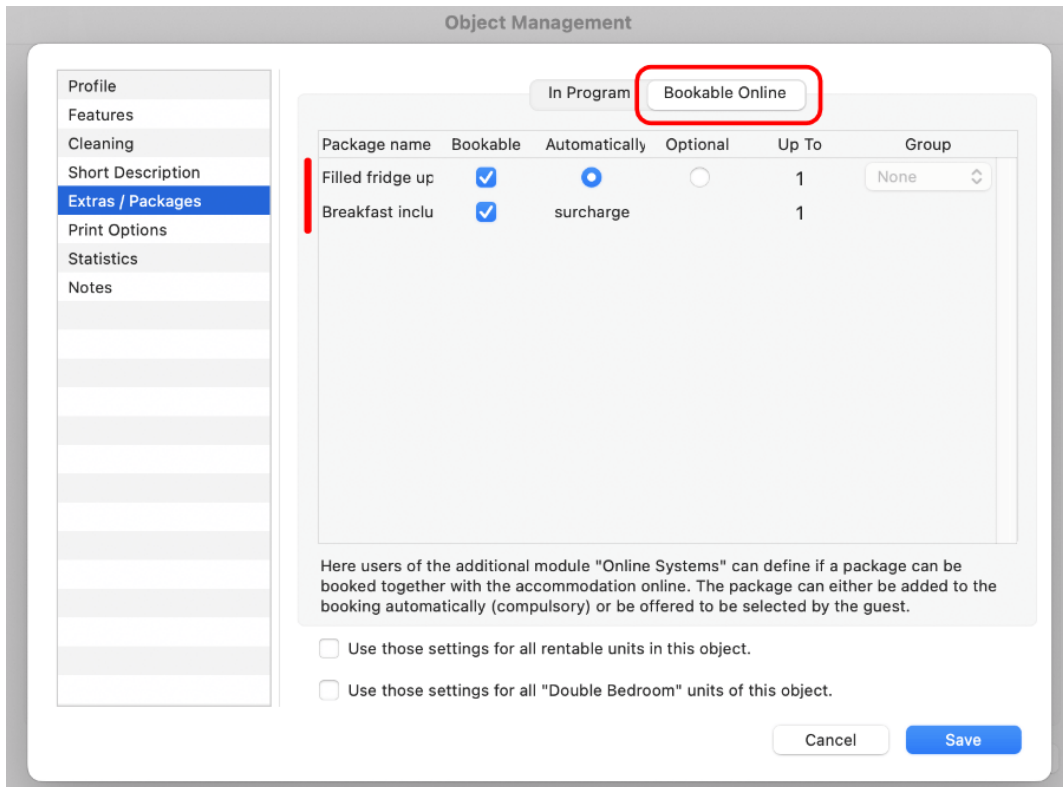
In the booking process, the selection for your guests then looks like this (German image):
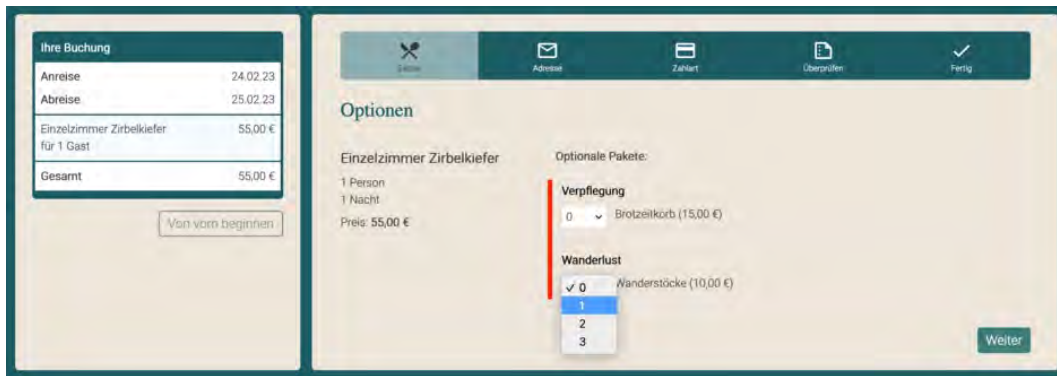
3. Extra Item Packages with Alternative Selection

You can also offer several extra item packages to choose from. For example, your guests can then choose a certain breakfast set during the booking. To do this, you must create so-called "selection groups" under **Object management > Rental units > Extra item packages**. Attention, the name for this selection group is visible for guests. All alternatives of a certain extra item type (e.g. breakfast) must be part of this selection group.

This allows you to put different catering options (breakfast, half board and full board) or transfer options (from the airport, from the train station and from the port) into a selection group and your guests then choose the preferred option accordingly (German image below).
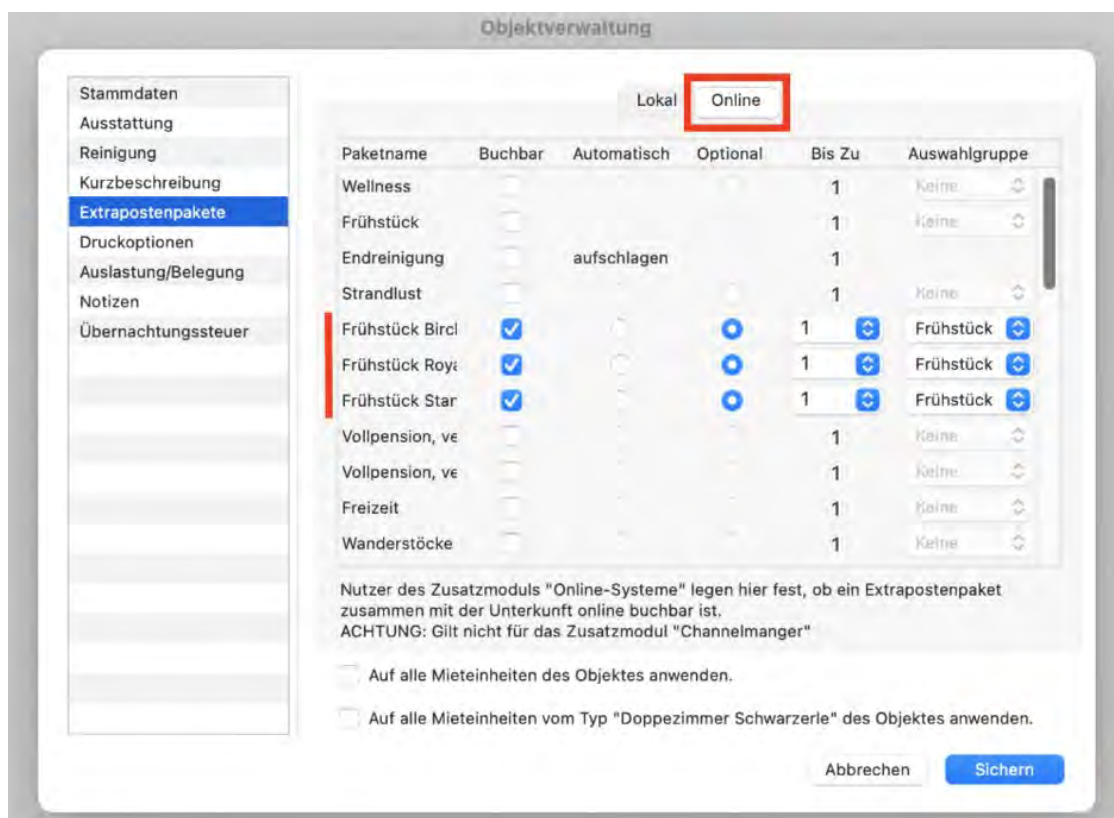
In the booking process, the selection for your guests then looks like this (German image):
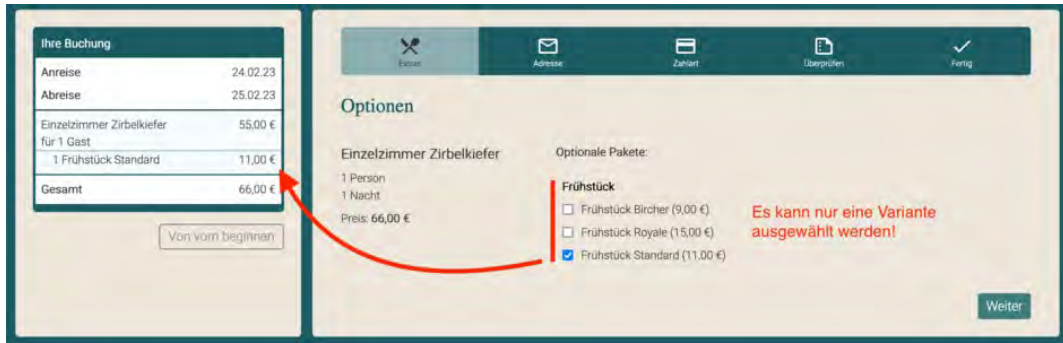
PREFERENCES AND SETTINGS   UP   RECEIVING AND CONFIRMING ONLINE BOOKINGS

Receiving and confirming online bookings

Each synchronisation will check for new online bookings and import them in your system. If possible, the booking will be added directly into the unit in the reservation schedule. All those newly added bookings will have the status "New Online Booking" so they'll be easier to recognise. They are also **automatically locked**, so that they can't accidentally be moved, shortened or extended. To move, shorten or extend such a booking, you can manually unlock it in the booking window.

> *Tip:*
> *If you don't want to automatically lock new online bookings, you can turn this feature off under Administration > Synchronisation and Online Modules.*

After you have synchronised your Lodgit Desk program with the Lodgit online modules, you should confirm newly received bookings by doing the following.

1. In the main window, open the booking list with the online bookings by going to **View > Show Booking List**.
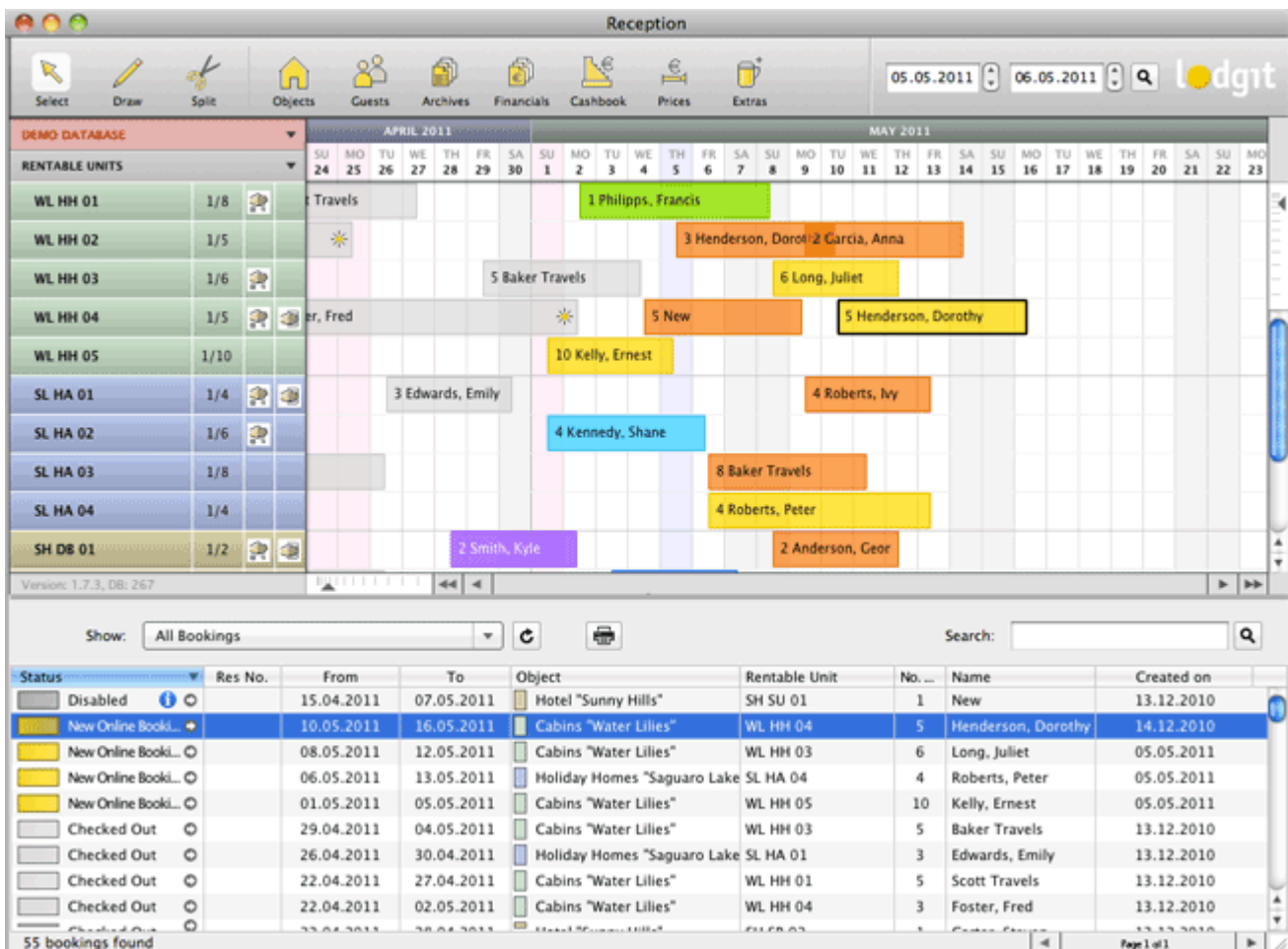
At the bottom of the main window you will then see the Booking List with new online bookings. All new online bookings have the status "New Online Booking" and their default color is yellow.

2. If you want to check if a deposit should be paid for an online booking, open it by double-clicking on it. Within the booking window, go to the list item "Deposits":

3. When you have received the deposit, enter the date of receipt under "Received On".

If you have to do a debit or charge a credit card for the deposit, go to the list item "Online Booking". There you will find the **payment information you need**.

Important:

You can delete the payment information after processing them to protect yourself and your guest from data thieves. Please note that deleting this information CANNOT be undone!

5. After that you can create a confirmation by pressing the button "Create Confirmation" and send it to the guest. The online booking will then automatically receive the booking status "Confirmed".

Important: Your guest will only receive a **binding booking confirmation** when you create the confirmation in the way described above!

SYNCHRONISE EXTRA ITEMS   UP   CANCELLING ONLINE BOOKINGS

Cancelling online bookings

Unlike bookings that you have created in Lodgit Desk yourself, you cannot simply delete an online booking. Instead, you will have to let the Online Booking System know which bookings are to be deleted before you can remove them from the reservation schedule entirely.

If you want to cancel an online booking you have to:

1. Select the booking you want to delete in the reservation schedule and then go to "Bookings > Delete Booking...". The following message will appear:

> **Do you really want to delete the selected booking?**
> This action cannot be undone!
>
> (Cancel)   (**Delete Booking**)
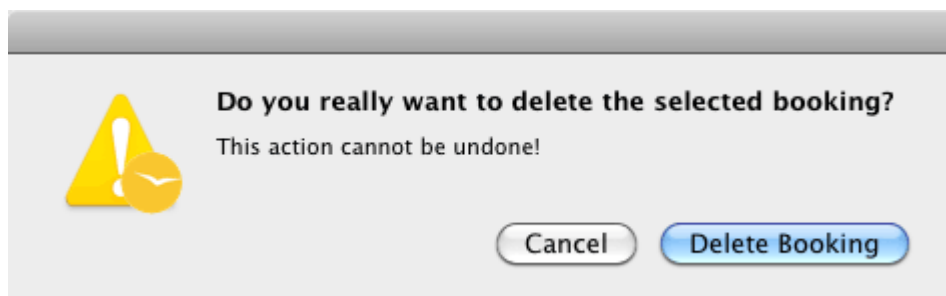
If you confirm the deleting of the booking, the online booking will first be marked as "to be cancelled":

1 Keller, Stef

2. All bookings that are marked as "to be canceled" will be sent to the Lodgit Online Booking System during the next synchronisation.

3. During the next synchronisation after that, the Online Booking System will confirm the cancellation of the bookings. The bookings in question will receive the status "Cancelled Online Booking". The color of this status can be defined in the Preferences under "Reservation Schedule > Colors".

4. Now, you can delete the bookings as usual.

Note:
When you delete an online booking that has been split because of a move, you can delete all the parts as usual. After you have deleted ALL the parts of that booking, the Online Booking System will be told to cancel them during the next synchronisation. This could have an effect on the booking commission.

RECEIVING AND CONFIRMING ONLINE BOOKINGS   UP   ONLINE BOOKING CALENDAR & OWNER-BOOKING

Additional Module "Booking Calendar & Owner-Booking"

If you own a valid Lodgit Desk license, you can also apply for the additional module "Booking Calendar & Owner-Booking" so that you can:

- use any computer or smart phone to view the online booking calendar (which is always updated thanks to the synchronisation feature in Lodgit Desk),
- integrate the online booking calendar into your website using a code snippet (iframe),
- create bookings yourself (online Owner-Booking) and send these automatically to Lodgit Desk.

The additional module can be booked online for any number of rentable units along with the Lodgit Desk license. If you already own a Lodgit Desk license, you can later book the module as well.

After it has been activated, you can then use the module "Booking Calendar & Owner-Booking" via your SSL protected personal login area on the Lodgit Website.

CANCELLING ONLINE BOOKINGS   UP   FAQ ONLINE BOOKING SYSTEMS

Frequently Asked Questions | Booking Systems

Can I integrate the Online Booking System directly through an iFrame into my website?

While it's theoretically possible, we no longer recommend it. The default settings of newer browser prohibit cookies from third party sites (e.g. advertisements). The Online Booking System runs on our servers, so if you were to integrate it through an iFrame, we would be a third party provider and the Online Booking System may not be displayed correctly, if at all, to your guests. That is why we recommend to link to the Online Booking System instead and use the options for CSS, HTML Contents and Banners to make it look as closely as possible to your website design.

The Booking Calendar, however, can be integrated into your website with an iFrame without any problems because it doesn't require any cookies.

I've added all the required information but the Online Booking System / Booking Calendar still can't be accessed!

Please make sure that the Online Booking System or Booking Calendar is actually activated for the object or unit. Always remember: The box on the page where you take the link from must be checked.

I've edited the CSS styles, but the changes aren't reflected in my Online Booking System!

All CSS styles are first deactivated to avoid unwanted or accidental changes. To activate them, simply remove the characters /* before and */ after the line you want to activate. Likewise, if you want to quickly undo changes, add those characters in to deactivate a line.

I have synchronised multiple times but my units are still not available in my Lodgit account!

Lodgit Desk allows you to decide for yourself which rentable units you want to make available online. You can define that within the software under Administration > *Synchronisation and Online Modules > Synchronise:*

Make sure that every unit you want to synchronise is checked. Changes made to this list will be reflected after the next synchronisation.

Whenever I synchronise, I'm told that I have exceeded my allotment!

The allotment for the Online Systems is not the same as the allotment for Lodgit Desk itself. So while you can, for example, manage up to 20 units in Lodgit Desk at a flat rate, the Online Systems require a small monthly fee for each rentable unit you want to put online. So you are free to only make a few of the units you manage available in your Online Booking System. Go to *Administration > Synchronisation and Online Modules > Synchronise* and make sure that only the units you want to synchronise are checked. If you have checked more than you've unlocked for the Online Systems you can either uncheck some or extend your allotment in our online shop at www.lodgit.com/shop.

Whenever a new online booking is imported, it has a little lock in the reservation schedule and I can't move it!

New online bookings are 'locked' automatically by default as soon as they're imported into the reservation schedule. That is a feature meant to keep you from accidentally moving, shortening or extending the booking before you've created a confirmation for it. You can always unlock a booking through its booking window:

Uncheck the box that says *Lock* and then you can move, shorten and lengthen the booking as usual. You can also decide that online bookings shouldn't be automatically locked, see the Settings for the Synchronisation.

ONLINE BOOKING CALENDAR & OWNER-BOOKING   UP   RECEIVING ONLINE PAYMENTS (PAYPAL CHECKOUT)

Receiving Online payments

A guest can immediately pay online for a booking made in the Lodgit online booking system. Lodgit hotel software offers this service in cooperation with the online payment service Paypal.

You make the necessary settings for this in your personal account at lodgit.com.

Within settings, select "Payment methods of the guest" in the drop-down menu next to **Show**.
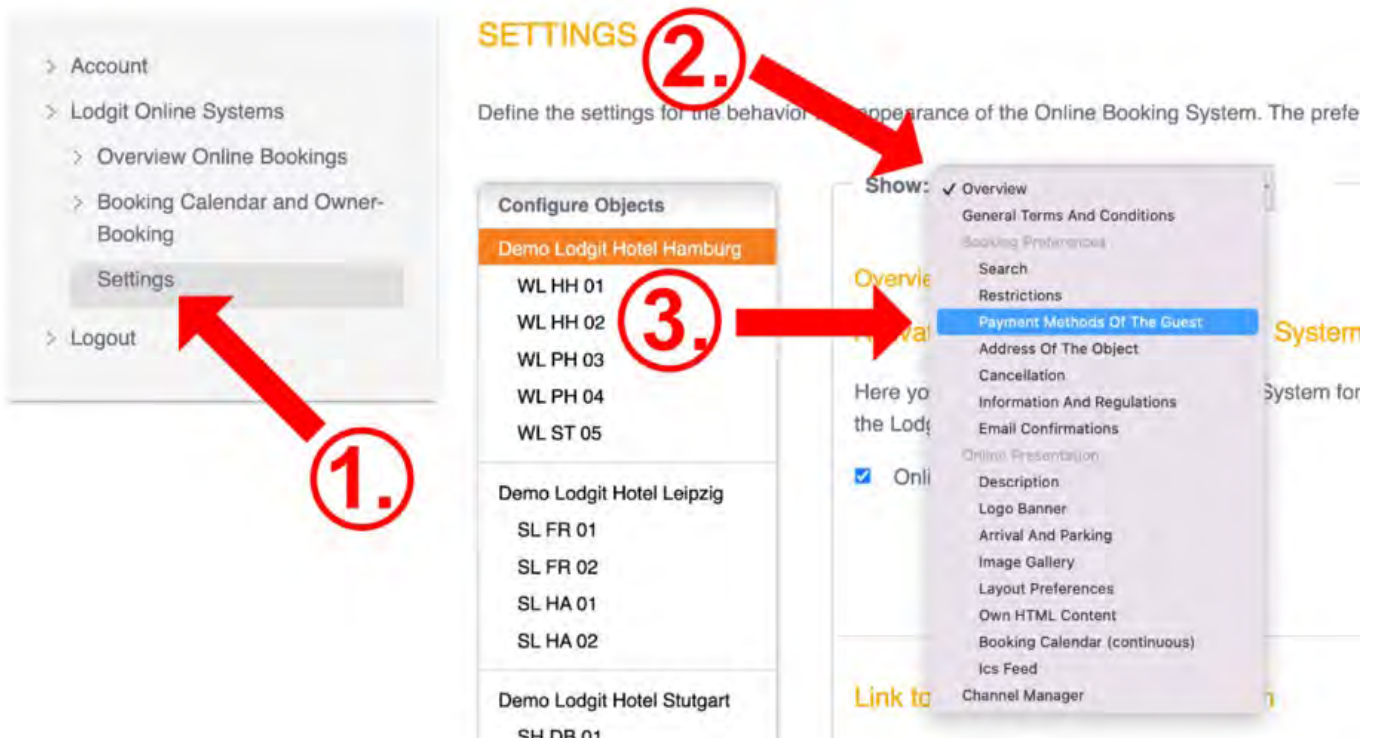
For the payment via Paypal you have the following two options:

☐ **PayPal payments to your account**

Account (Email)*

Available until   `0`   days before arrival

Deposit   ⦿ in the amount of `10` ∨ % required

         ○ Guest must pay the full amount

☐ **Direkte Online-Zahlung (via PayPal)**

Client ID*

Client Secret*

Zahloption*   ☑ Paypal Zahlbutton

         ☐ Kredit-/Debitkarte Zahlbutton

         ☐ Sepa Lastschriftmandat Zahlbutton

Available until   `0`   days before arrival

Deposit   ○ in the amount of `5` ∨ % required

         ⦿ Guest must pay the full amount

PayPal payment to your account

With this payment method, the guest will be sent a link on the confirmation page as well as in the confirmation email **after the booking has been made**. Via this link, the outstanding amount can be sent directly to your PayPal account. The guest also needs a PayPal account for this.

This payment method corresponds roughly to a payment by bank transfer: Here, too, you will receive the booking regardless of the payment made and must check the receipt of payment yourself.

To offer this payment method, you only need to enter your email address by which you registered your PayPal account.

Direct online payment via PayPal (Paypal PLUS)

With this option you can offer **credit card payments** or **payments by direct debit** in addition to the payment via the guest's PayPal account. The guest **does not need a PayPal account himself** for the first two options. Paypal serves in this case only as an online payment service provider, whereby payments are collected before the booking is completed. This so-called **Paypal PLUS** option creates security, since no booking can be triggered without payment. In addition, you receive all payments clearly on the same account.

Setting up Paypal PLUS

Please note that for the Paypal PLUS option you must have a Paypal Business account. You can set this up on the Paypal Business website.

To link the online booking system of Lodgit with Paypal PLUS, you need two "access codes", which you have to enter once in that field.

The required data "Client ID" and "Client Secret" can be found on developer.paypal.com. Log in there with your PayPal business account and click on "My Apps & Credentials" in the left menu. Then switch to "Live" in the right part of the window and click on "Create New App".
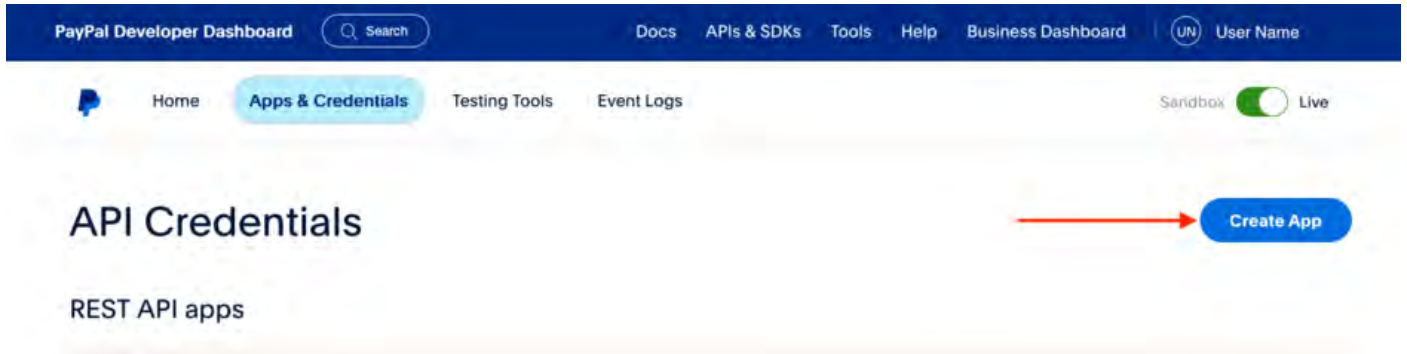
In the next step, you can assign any name for the new Application (App) for which you will receive "Client ID" and "Secret". For example, enter "Online booking system", "Ticketshop" or similar.
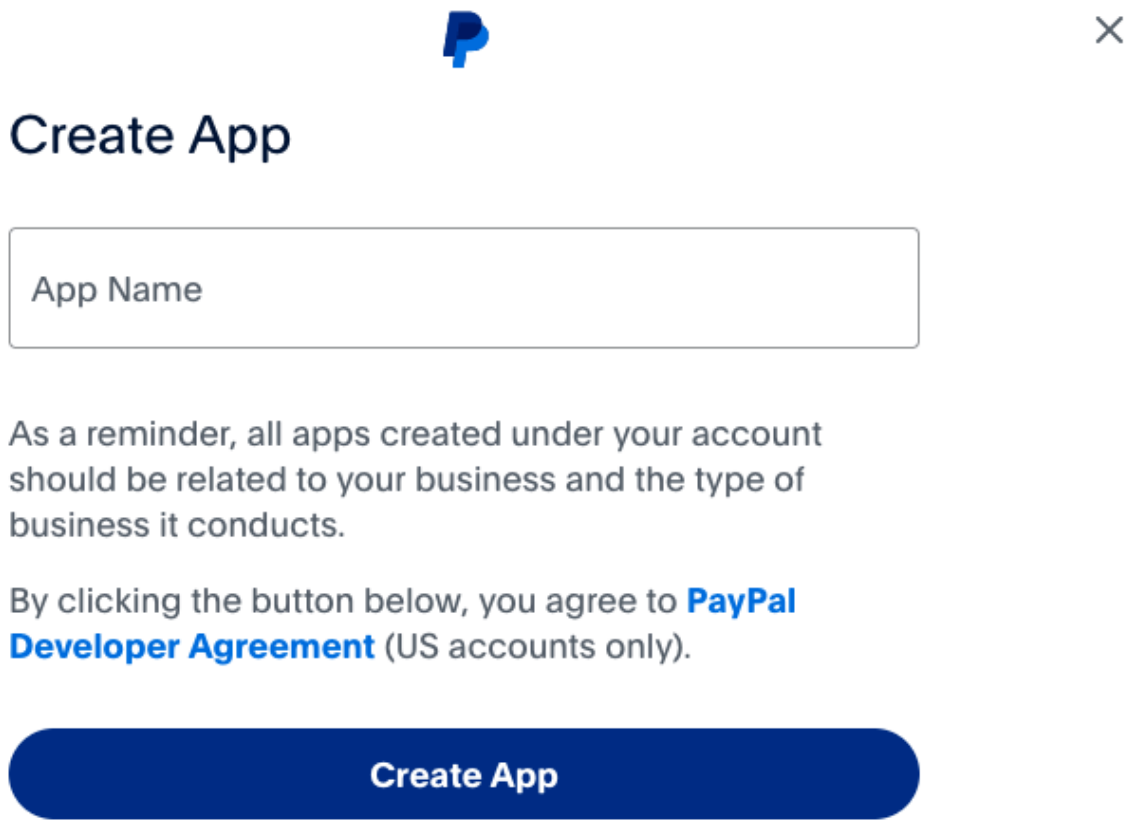
Then you will find an application (App) with this name in the list (here: Ticketshop). Click on it and you will get the required data. Copy the "Client ID" and paste it into the corresponding field in the settings of the Lodgit online booking system. The "Client Secret" will be displayed after you click on "Show". Also copy this into the settings of your booking system.

API Credentials

REST API apps

App name	Client ID	Secret

Technically, all requirements are now met to accept payments via PayPal. Still set the appropriate checkmarks to enable credit card payment and/or direct debit. Finally, select availability and deposit options. Done!

Regarding the conditions (possible transaction fees, acceptance of credit card and direct debit, ...) please contact PayPal directly to have your business account set up according to your wishes.

FAQ ONLINE BOOKING SYSTEMS   UP   ELECTRONIC REGISTRATION SYSTEMS

Additional module: Interface to electronic registration systems

The additional module "Interface: Electronic Registration Systems" allows you to connect Lodgit Desk to your municipality's electronic registration system to digitally send the required guest information.

Unfortunately, we currently only connect to electronic registration systems in the German speaking market.

You can still use Lodgit Desk to create a common registration form for your guests!

RECEIVING ONLINE PAYMENTS (PAYPAL CHECKOUT)   UP   HOTEL LOCKING SYSTEMS

Additional module Hotel Locking Systems

With SALTO® electronic locking systems, Lodgit Desk can handle the coding of guest media (keys, cards) and send a mobile key for opening to the guest's mobile phone. We therefore offer you the optional use of an interface to SALTO locking systems within the additional module "Hotel Locking Systems" for Lodgit Desk. The module can be purchased for a one-time license fee.

Unlock additional module "Hotel Locking Systems"

To unlock the additional module, go to Administration > Additional Modules > Salto Hotel Locking System
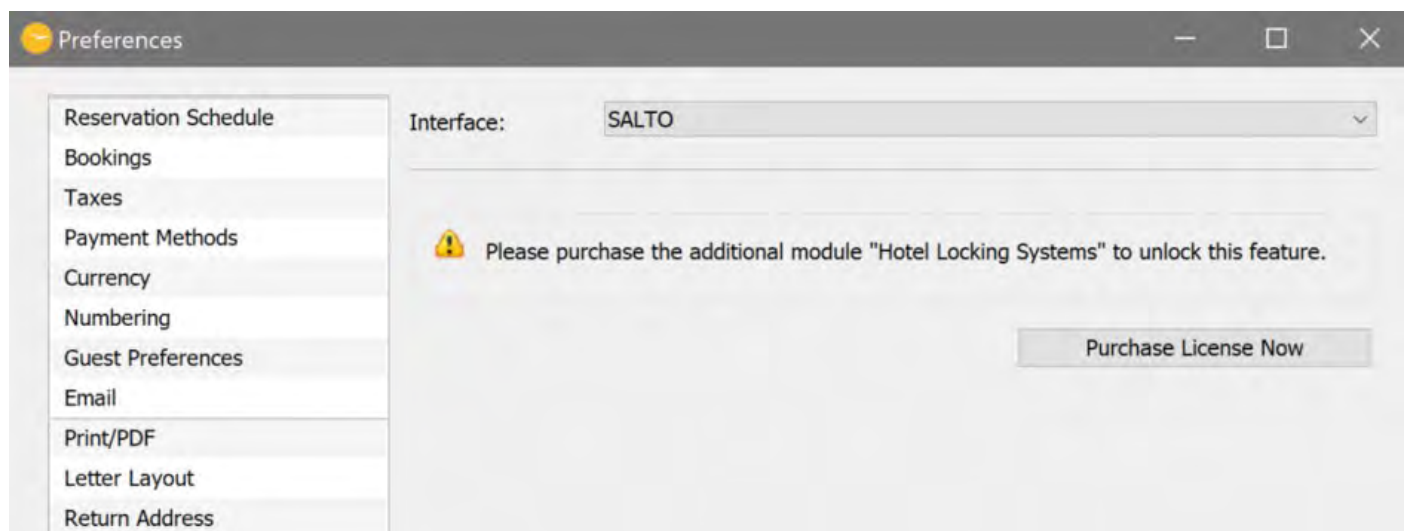
Please press "Purchase License Now" which will then forward you to the customer log-in area.

This is where you can access your personal area within the Lodgit website. You can do so by logging in with your personal username and password that you received when you registered for a Lodgit Desk user license.

After you have logged in, open the page "Additional Modules" where you should press the button "Apply" next to "Hotel Locking Systems". After that, you will receive a new license key from us that also unlocks the additional module.

The additional module hotel locking system currently supports the connection to the following systems:

SALTO Connection to the Salto hotel locking system
Häfele Connection to the Häfele hotel locking system

ELECTRONIC REGISTRATION SYSTEMS   UP   HOTEL LOCKING SYSTEM SALTO

Additional Module Hotel Locking System SALTO

Preferences

The main component of the SALTO hotel locking system is SALTO ProAccess, an access control and settings configuration management system that is operated via a web interface. Components are among others:

- ProAccess Space for the online management of access controls.
- SALTO-Service, a Windows service for communication between e.g. peripheral devices, ProAccess Space, the database, etc. This is controlled by the ProAccess Space Configurator, a desktop application that is also used to start and stop the SALTO service.
- Local IO Bridge, a Windows service that establishes a connection between a USB device and the browser so that they can be used with ProAccess. It must be installed on each client PC where a USB coding station or PPD (Portable Programming Device) is to be used.

SALTO-Service and, if necessary, the Local IO-Bridge must be started in order to work with the Lodgit Additional Module.

Interface

Please select >SALTO here.
The protocol version 1.20 of the interface is based on the Industry Standard PMS Protocol: Version 1.20 by SALTO;
Protocol version 1.3 of the interface is based on Salto HAMS: PMS Protocol Version 1.3 by SALTO.

Everything you need to set up is provided by the manufacturer of the hotel locking system, who will also provide you with the appropriate support.

In order to use the system correctly with Lodgit Desk you will have to define a few settings. These **Preferences** can be defined under Lodgit Desk > Preferences > Hotel Locking Systems (Mac) or Edit > Preferences > Hotel Locking Systems (Windows).
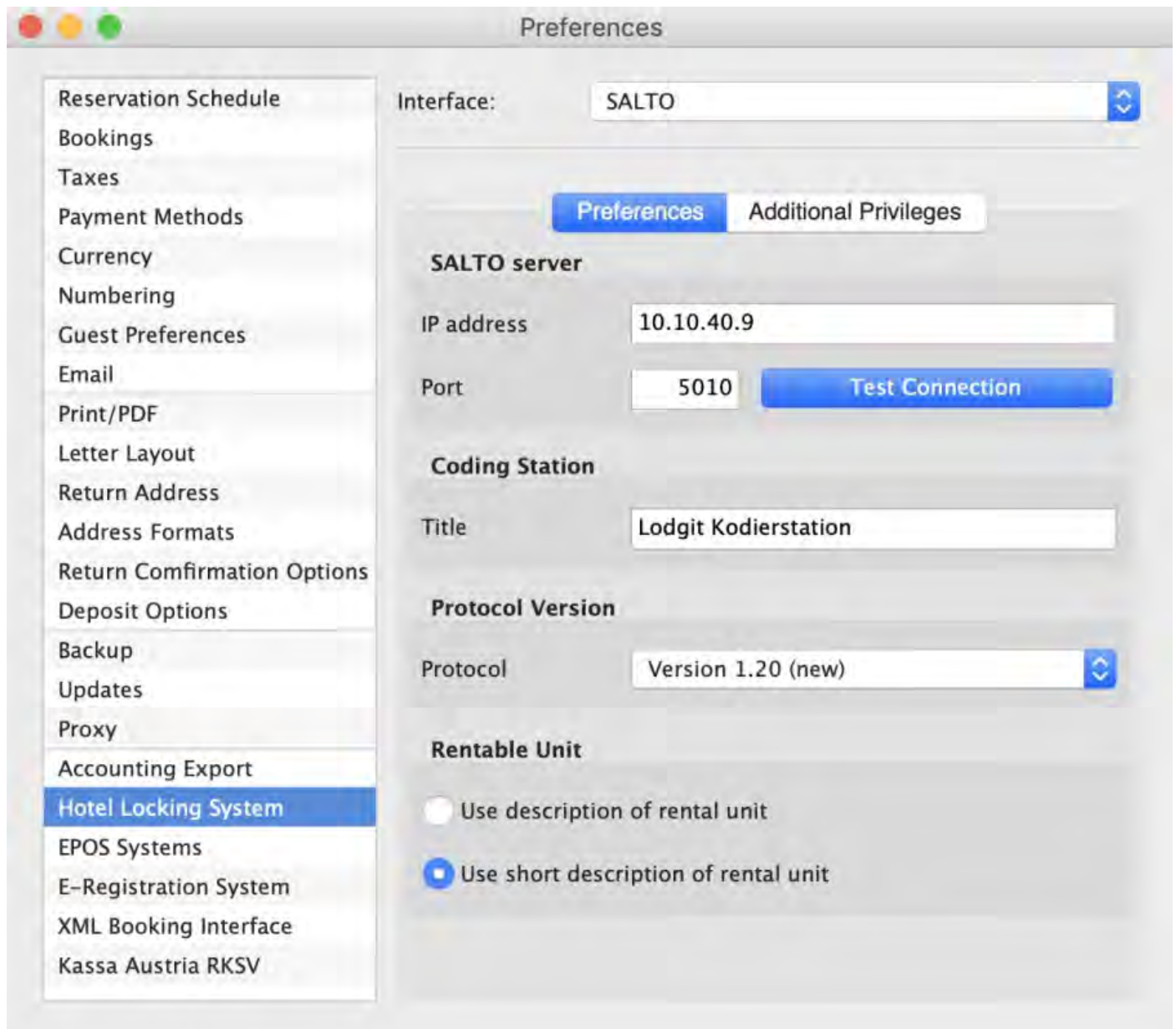
SALTO server

Enter the IP address of the computer on which the SALTO service or the local IO bridge is running and the port used. The port is specified in the SALTO server settings. The default value is 5010. Make sure that the connection is not blocked by firewalls.

Encoding station

A coding station is a device for reading and writing guest media. Enter the name of the encoding station you want to control via this Lodgit Desk installation. The names for encoding stations are defined in the SALTO service.

Protocol version

Select here whether you want to work with the older version 1.3 or with version 1.20, with which you can define up to 62 additional areas and send mobile keys.

Please note the following:
You can only work with the Salto protocol version 1.20 if the Salto server also has at least this version - previous versions of the Salto server are not supported. So

either update your Salto server or select 1.3 in Lodgit as the protocol version.

Rental unit

Here you specify whether the name or the short name of a rental unit is to be used. You must enter the rooms in the SALTO web interface with exactly this description.

Additional Privileges

If you code a guest medium, you can grant your guest access to up to four rooms and up to 9 (Salto version 1.3) or up to 62 additional privileges (Salto version 1.20). These additional privileges are defined in the settings of the SALTO service. Enter the additional privileges in Lodgit Desk in the similar way.

If you code a guest medium, you can grant your guest access to up to four rooms and up to 9 (Salto version 1.3) or up to 62 additional privileges (Salto version 1.20). These additional privileges are defined online in the SALTO web interface. For details please contact Salto directly.

Enter the additional areas in Lodgit Desk in the same way.
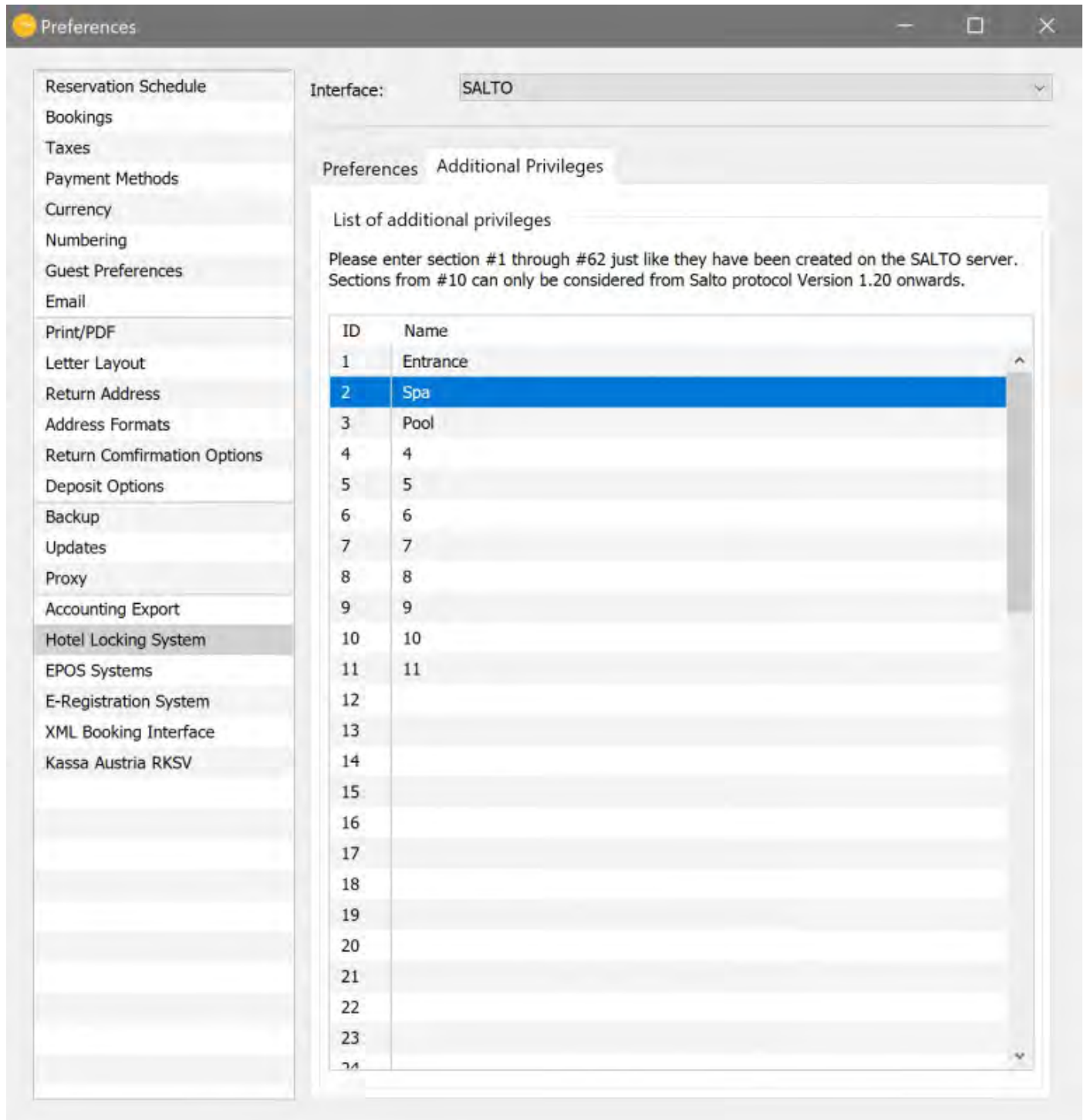
Coding via the booking window

You can easily and conveniently encode one or more cards or send mobile keys to your guests via the booking window. Please open a booking and go to the menu item **>General >Interfaces** to **> Hotel Locking System**.
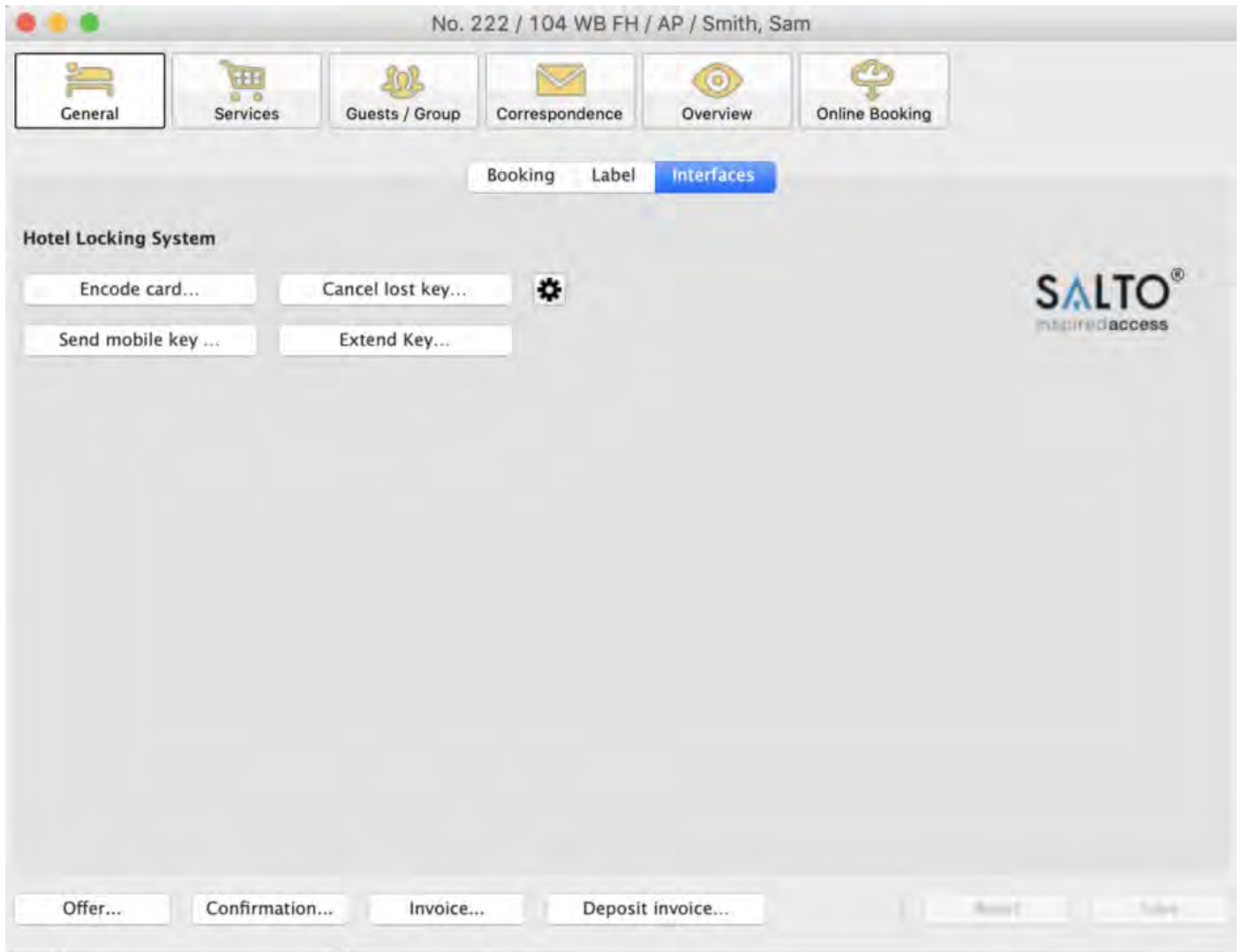
Coding card

With a click on the button "Coding card..." the window for encoding a guest medium opens. All relevant data such as room name as well as arrival and departure data are taken over from the booking and do not need to be entered again.

A card can allow access to up to four rental units and up to 9 (Salto version 1.3) or 62 (Salto version 1.20) additional privileges.

One-Time Medium

You can create a one-time medium for service personnel that will only grant access to an area once.

Key cards

When encoding a guest medium, you can create copies for accompanying guests in a single process. Simply enter the total number of media required under "Key cards".

Create a copy of the first medium as well

Check the box that says "Create a copy of the first medium as well" if you know, you

will have to create copies of this medium later on (e.g. if the partner arrives one day later).

Send mobile key

If your guest has installed the Salto JustIN Mobile App on his/ her smartphone and your doors are designed for it, you can send your guest a so-called "Mobile Key" on the day of arrival. The message tells him/ her which rooms or additional privileges can be opened with the Mobile Key. The guest only has to hold his/ her smartphone in front of the corresponding door lock and start the app.

Only Mobile Keys can be sent to mobile numbers that correspond to the format requested by Salto. They must start with a "+", followed by the country code and then the mobile number without the leading "0" and with at least 6 digits. Apart from the leading "+", only numbers are accepted, but no other characters including spaces.

Example: The German mobile number 0123 45678900 must therefore be entered in Lodgit as follows: +4912345678900. The same mobile number of a Swiss provider: +41112345678900.

All guests who are registered in a booking are displayed with their telephone numbers

as they are registered in the guest administration. If several numbers are entered for a guest, you can click on the small triangle at the end of the column >Mobile number to see the other telephone numbers and select the appropriate one.

By using the "+" sign in the first column, you can manually enter further mobile numbers to which you would like to send a Mobile Key.

If the key was sent successfully, this will be displayed in the column "Sending result".

Under >Text message you can send a short message to your guest.

> Please also note the following:
> Always send Mobile Keys on the day of your guest's arrival when all previous bookings from the room have the status "Checked out". If you send a Mobile Key for a room and then set an old booking to "Checked Out", ALL existing keys, including those created for the FUTURE, will become invalid. If necessary, please send your guest a new Mobile Key.

If you have any questions about the Mobile Key, please contact Salto directly.

Cancel lost key

Here you cancel ALL mobile keys or information on the coded cards that were sent concerning this rental unit, regardless of the validity period. The cancellation includes access authorisation for all other rental units and additional privileges saved under this key.

For cards - please note that the door fittings can update the medium data to use this function.

Extend key

Möchte ein Gast länger bleiben, können Sie problemlos seinen Mobile Key bzw. seine Karte verlängern. Bitte verlängern Sie zunächst die Buchung entsprechend. Klicken Sie anschließend auf den Button >Schlüssel verlängern. Es wird Ihnen automatisch der neue Abreisetag angezeigt. Die Verlängerung schließt alle Mieteinheiten und Bereiche ein, für die der Schlüssel zuvor galt.

Salto Hotel Locking System

If you do not want to work directly from a booking, you can use >Administration >Additional Modules >Salto Hotel Locking Systems to access the functions for cancelling keys or for deleting, encoding or reading guest media.
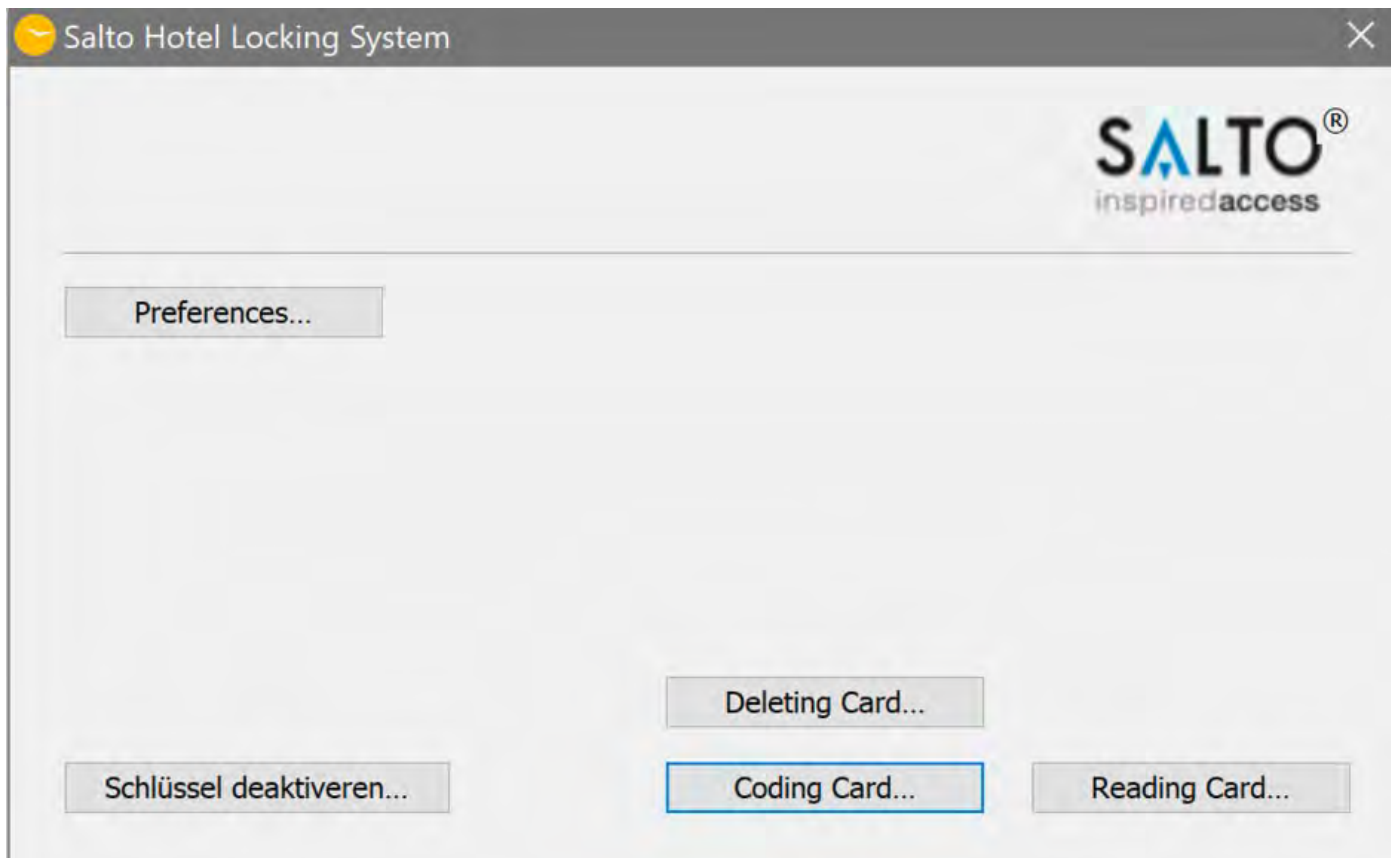
The functions >Cancel lost key and >Coding Card are described above under Coding via the booking window.

Deleting Card

This function deletes a card and makes it invalid, so that access to the corresponding rooms and additional privileges is no longer possible with it. Please note the following:

If you delete the card via Lodgit Desk, the existing data will be overwritten with invalid data from any rental unit.

If you have deleted the card directly via the SALTO service >Empty medium and then read the card via Lodgit Desk, you will receive an error message stating that it is a one-time medium or that the card is damaged. Please simply click this message away. The data on the card is deleted and you can rewrite it.

Reading Card

Use this function to read and display the content of a guest medium.

Hotel Locking Systems   Up   Hotel Locking System Häfele

Additional Module Hotel Locking System Häfele

Preferences

Settings are necessary to properly connect Lodgit Desk to the hotel locking system. You can define these settings under the menu item Lodgit Desk >Preferences >Hotel Locking System (Mac) or Edit >Preferences >Hotel Locking System (Windows).

Interface

Please select >Häfele here. The protocol version of the interface is based on the standard specification V1.4 Dialock 2.0 from Häfele.

Everything you need to set up your hotel will be provided by the manufacturer of the hotel locking system, who will also provide you with the appropriate support.

Häfele-Server & Coding Station

Specify the >IP address of the computer on which the Häfele server is installed and the >port used. Here you must also enter the name of the >Encoding Station and the entry for >Page. You will find this information in the Häfele server settings. If you have any questions, please contact your Häfele contact person directly.

Make sure that the connection is not blocked by firewalls.

Rentable Unit

Attention: Please note that the **ID** of the rentable unit is used by default. Häfele is only accepts **positive numbers without the leading "0"**. Please adapt the ID of your rentable units in Lodgit if necessary.

If you have created your IDs for individual rental units according to EZ01, EZ02 etc., you can edit them in the unit's profile. Häfele's Dialock system only allows IDs such as 1,2,3,4 etc. The corresponding window for editing the data can be found in Lodgit Desk under Administration > Object management.

List of Additional Privileges

If you code a guest medium, you can grant your guest access to up to 20 additional areas in addition to the room. You define these additional privileges directly in Häfele. If you have any questions, please contact your Häfele contact person directly. Then enter the additional privileges in Lodgit in the same way.

Coding via booking window

You can easily and conveniently encode one or more cards via the booking window. Please open a booking and go to the menu item **>General >Interfaces** to **>Hotel Locking System**.
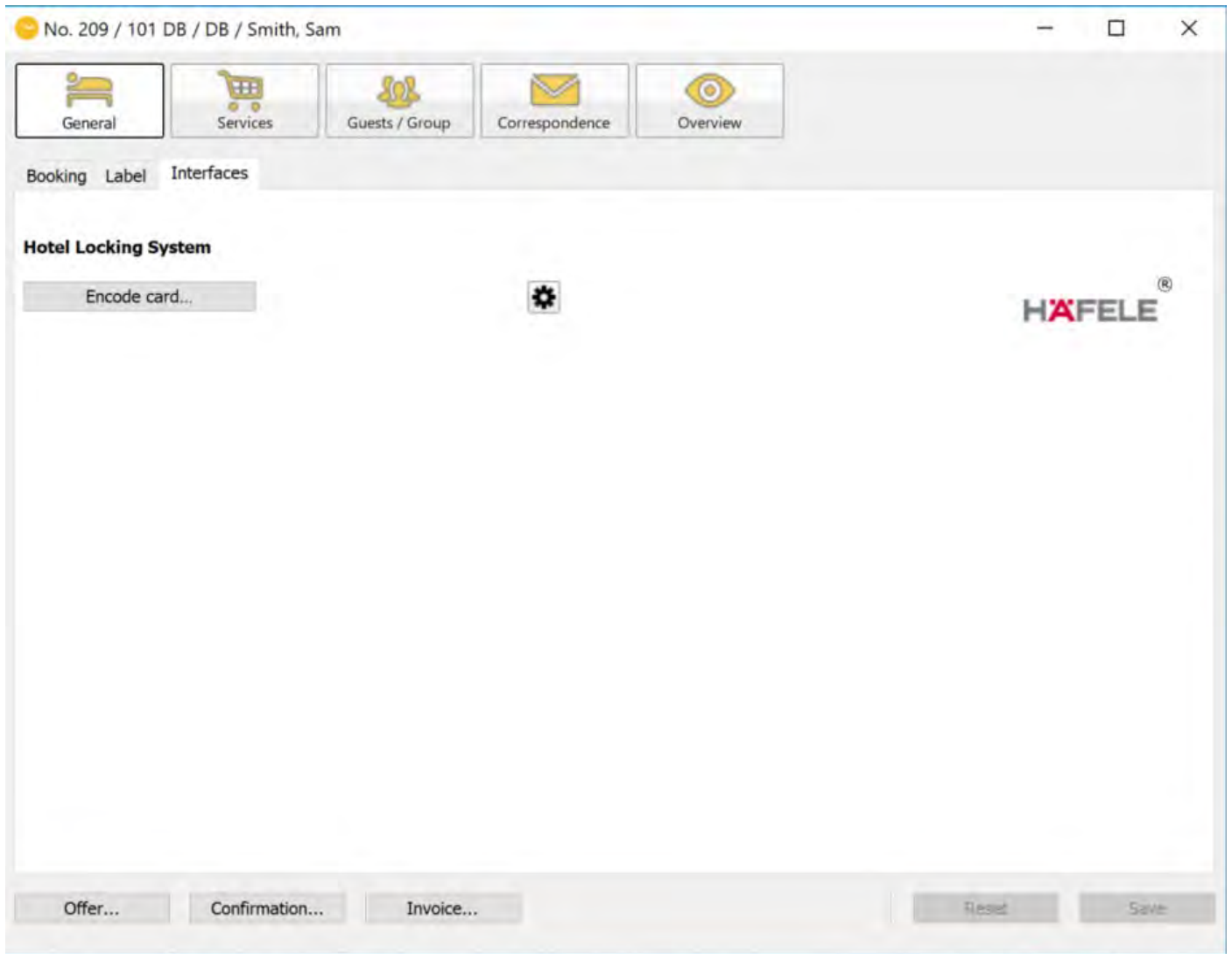
Coding card

With a click on the button "Coding card..." the window for encoding a guest medium opens. All relevant data such as room name as well as departure data are taken over from the booking and do not need to be entered again.

A card can allow access to the respective rental units and up to 20 additional areas.

New/ Replacement Key

With this option you create the "master key", which allows access for the selected room and the marked additional privileges. Please also use this function to create replacement keys for lost cards, for example.

Please note that the old card only becomes invalid after the new card has been used for the first time at the door of the rental unit. Before using the new card, access with the old card is still possible.

Additional Key

If required, any number of additional keys can be created for the respective room. Use this function to create keys later, e.g. if the accompanying guest arrives later. The coding as "additional key" has no influence on the validity of the "master key".

Visitor Keys

You use this function to define additional authorisations only.

Häfele Hotel Locking System

If you do not want to work directly from a booking, you can use >Administration >Additional Modules >Häfele Hotel Locking System to access the functions for

encoding or reading guest media.
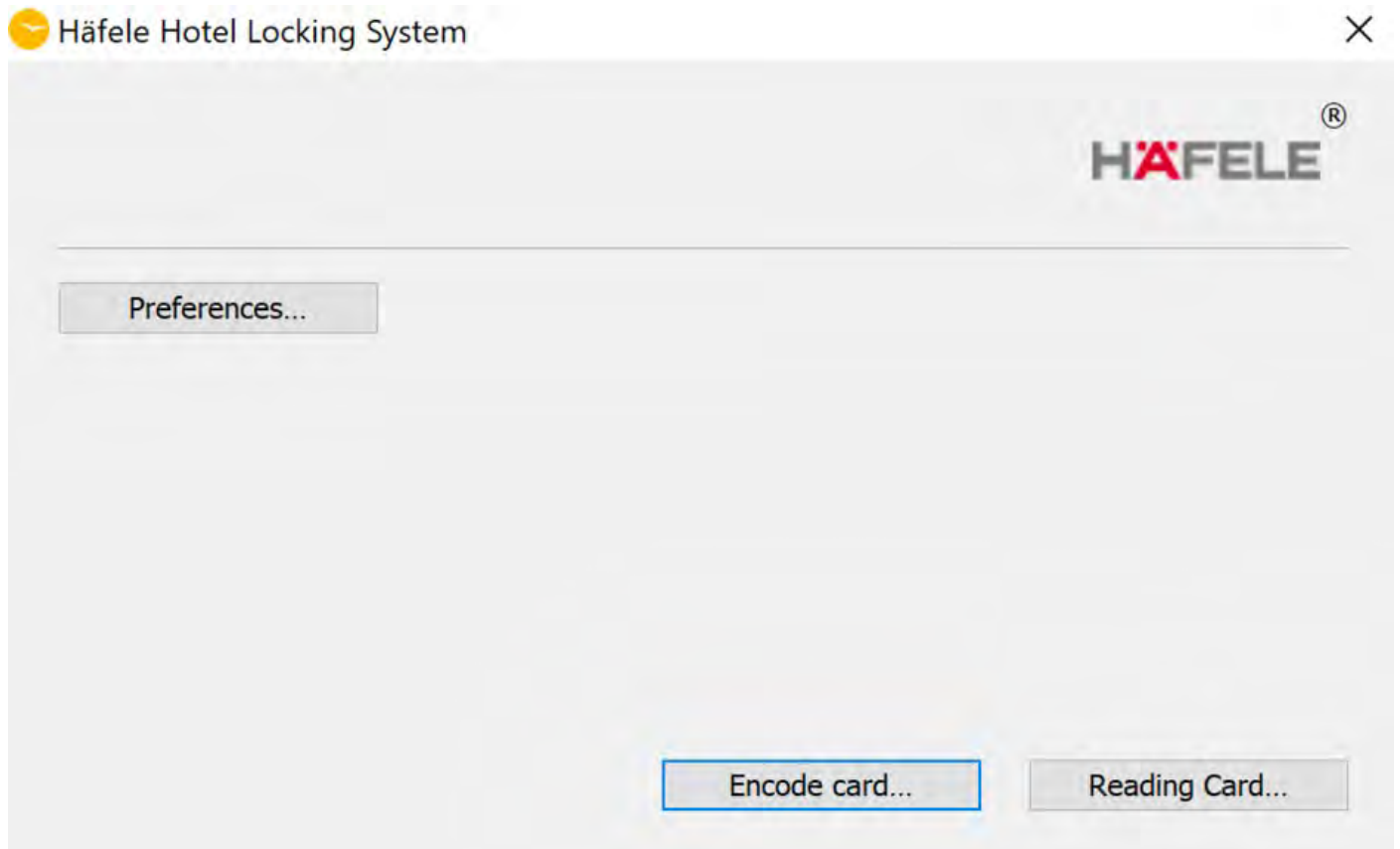
The function >Encode Card is described above under **Coding via the booking window**.

Reading Card

Use this function to read and display the content of a guest medium.

Hotel Locking System Salto　　Up　　EPOS Systems

Additional Module EPOS Systems

If you want to send revenues from your gastronomy cash register system to Lodgit Desk and add them to the respective bookings there, we can offer you the additional module "EPOS Systems". These service that were entered into your gastronomy register can be added as extras to an invoice. You can also analyse the revenue created by those extras under Lists > Extras List.

This module can be acquired for a small fee.

Unlock the module

To unlock the module go to
Windows: >Edit >Preferences >EPOS Systems
Mac OS X: >Lodgit Desk >Preferences >EPOS Systems
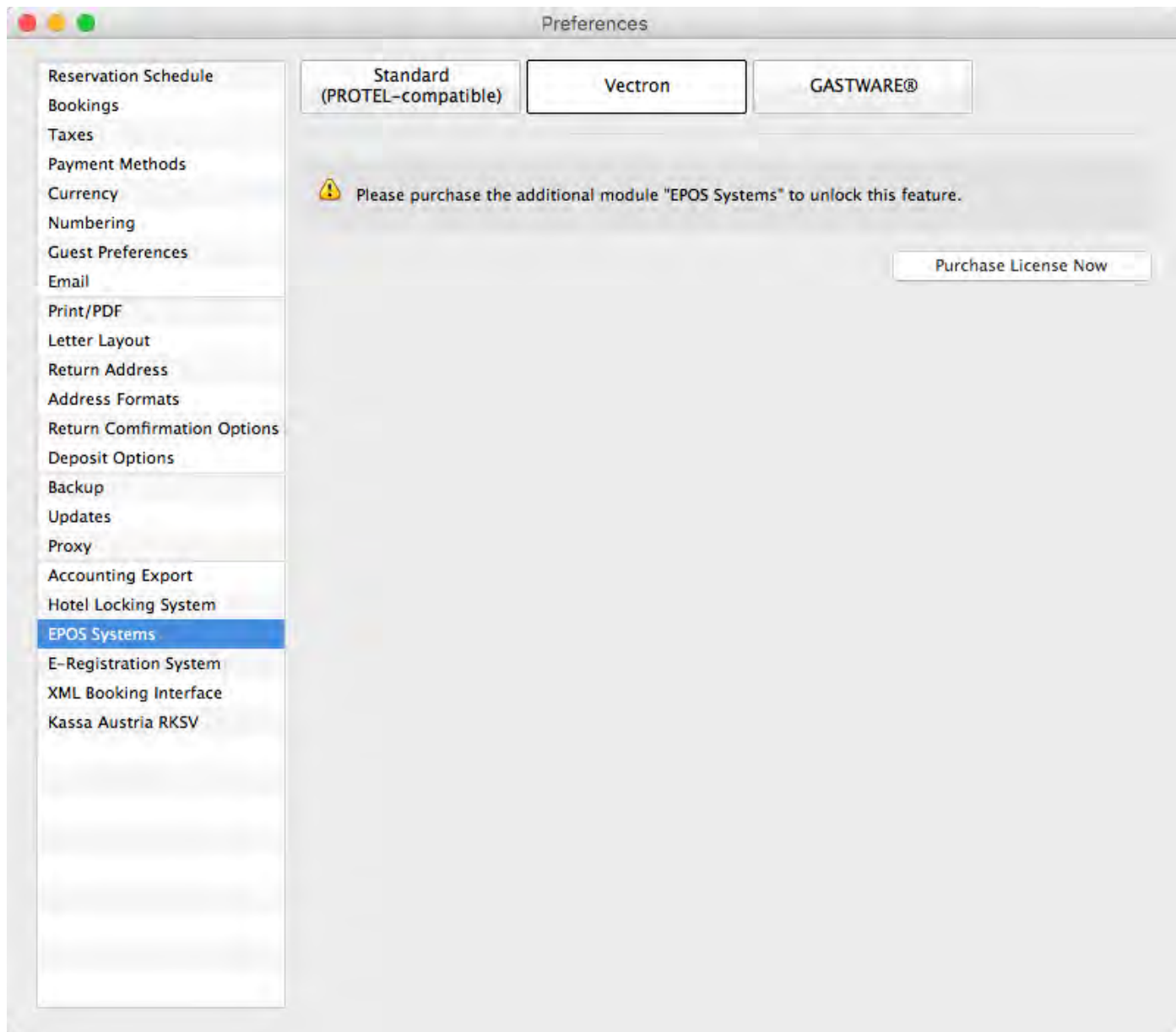
Please press "Purchase License Now" which will then forward you to the customer log-in area.

This is where you can access your personal area in the Lodgit website. You can do so by logging in with your personal username and password that you received when you registered for a Lodgit Desk user license.

After you have logged in, open the page "Additional Modules" where you should press the button "Apply" next to "EPOS Systems". After that, you will receive a new license key from us that also unlocks the additional module.

Interfaces

The additional module EPOS Systems is constantly being improved and currently supports the following systems:

Standard (PROTEL-compatible) Supports software that work with PROTEL protocol

Vectron EPOS Interface for Vectron systems

Gastware

EPOS Interface for Gastware systems

H<small>OTEL</small> L<small>OCKING</small> S<small>YSTEM</small> H<small>ÄFELE</small>   U<small>P</small>   I<small>NTERFACE</small> "S<small>TANDARD</small> (PROTEL-<small>COMPATIBLE</small>)"

EPOS System "Standard (PROTEL-compatible)"

This standard interface allows the automatic importing of revenues from your gastronomy software into Lodgit Desk, as long as it uses a PROTEL-compatible protocol. The revenues will automatically be added as Extras to the corresponding booking. If a revenue can't be automatically added to the corresponding booking, it will be listed in an error log which then lets you added them manually.

Preferences

To define the preferences for the "Standard (PROTEL-compatible)" interface go to:
Windows: Edit > Preferences > EPOS Systems
Mac OS X: Lodgit Desk > Preferences > EPOS Systems
and select the interface "Standard (PROTEL-compatible)".
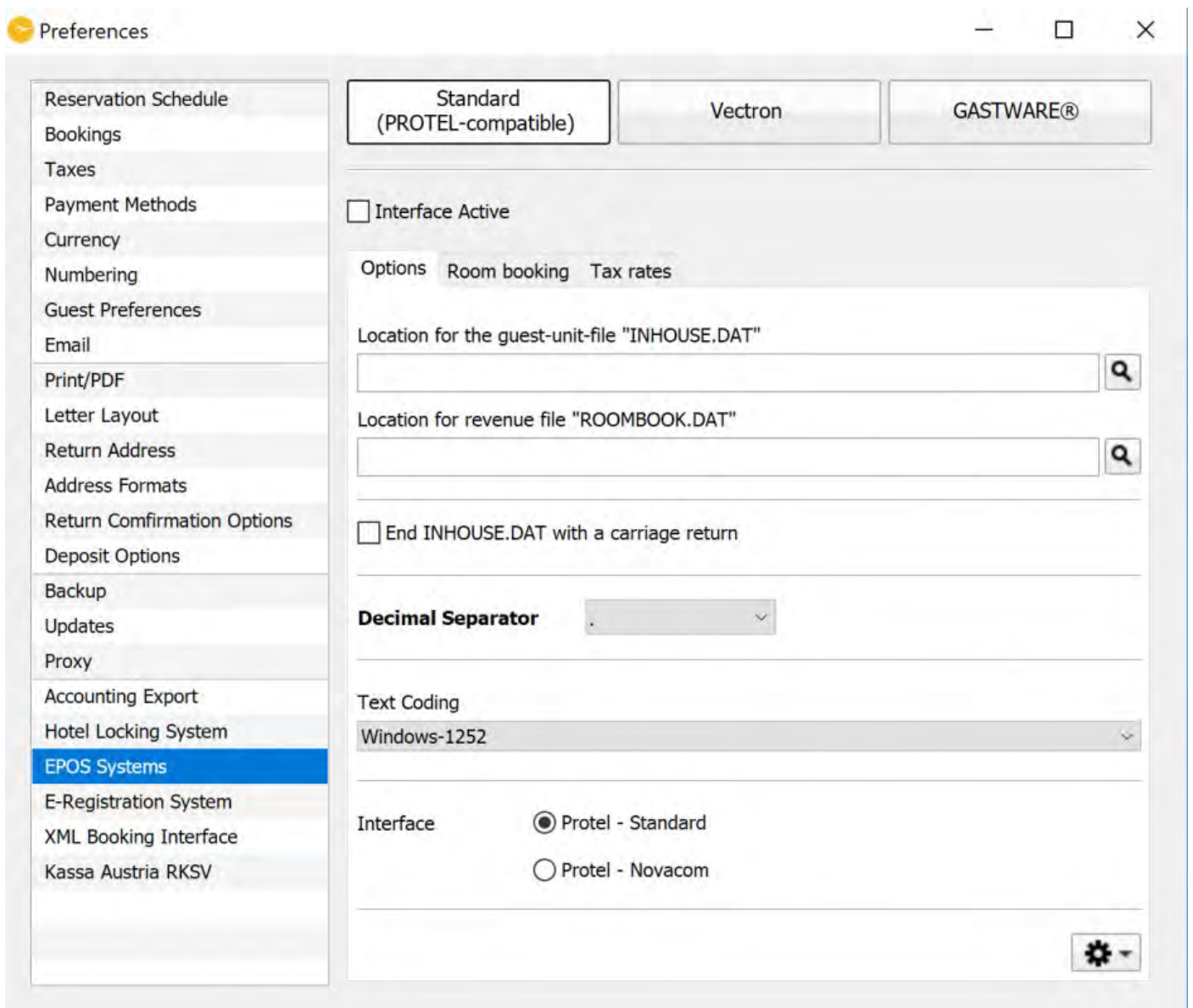
Options

To use the interface properly the following things are necessary.

Interface Active

This activates or deactivates the interface. If the interface is deactivated, no guest-unit-file is created and no bookings are being analysed.

Location for the guest-unit-file "INHOUSE.DAT"

This is the location where your software expects the file "INHOUSE.DAT". This file is automatically created by Lodgit Desk and contains a list of all currently checked in guests. This location can be on a network, but Lodgit Desk needs to be allowed to write in this location.

Location for the revenue file "ROOMBOOK.DAT"

This is the location where your software expects the file "ROOMBOOK.DAT". This file is automatically created by the gastronomy software and contains a list of sold products and services (revenues). This location can be on a network, but Lodgit Desk needs to be allowed to write in this location.

Carriage Return

The check mark activates the automatic insertion of an additional carriage return, i.e. an additional empty line at the end of INHOUSE.DAT. You can find out if you need to check the box by checking that all checked-in guests are displayed. Is this is not the case, please check the box.

Decimal Separator

Adjust the decimal separator to the one your EPOS System is using.

Text Coding

If, for example, special characters are not displayed correctly, select the appropriate text encoding here.

Interface

Here you select how Lodgit should handle the revenue file "ROOMBOOK.DAT", depending on what your cash register "requires". If necessary, ask your manufacturer or alternatively try out what works:

If you choose Protel-Standard, the file will be processed and then the content deleted. When using Protel-Novacon, the file is renamed, processed and then deleted.

Actions Menu

The guest-unit-file and the revenue file will automatically be created and analysed by the software and Lodgit Desk.

Using the Actions Menu ⚙▾ you can create the guest-unit-file and the revenue file manually to check if and how it works. You can also use this menu to open the error log.

Create guest-unit-file INHOUSE.DAT now

Analyse revenue file ROOMBOOK.DAT now

Open error log

Room booking

Extras

You can bundle all imported extra items so that they'll appear in one package per bill and make the final invoice easier to understand.

Tax rates

Here you select whether the sales from the POS are to be transferred as a service with or a disbursement without value-added tax.

"Disbursements" differ from other payments in that they are to be reimbursed by a third party on a one-to-one basis. In business terms, this does not mean remuneration for services, but only the passing on of concrete expenses.

The corresponding account can be set in the >Preferences under ">Accounting Export >Accounts >Default Extras >EPOS Systems"

Important: All tax rates must be assigned to the same number they have in the EPOS system! You can adjust the numbers individually.

Extras

To correctly map the items and services from the EPOS system to Lodgit Desk, you'll have to enter them into the Extras Management. Add the item's number in the EPOS system as the name and its description as the title:

Price and tax rate will be imported from the EPOS system. As the price unit, please select "per piece".

EPOS SYSTEMS   UP   ERROR LOG

Error log

Error log

The error log contains revenues that could not automatically be added to the corresponding booking. This allows you to assign the revenues manually.

The error protocol pops up automatically whenever at least one revenue could not be assigned and can always be viewed by going to **Administration > Additional Modules > EPOS Systems.**

Unread entries are **bold**. You can see the details of an entry by clicking on it.

The Actions Menu allows you to delete already assigned entries from the list.

POS System Interface: Vectron

Functionality

In order to avoid a guest having to pay his bill immediately at the restaurant, but to allow him to wait until he checks out, the bill can be added to the guest's booking. For this purpose, the hotel financial channel and then the associated Lodgit Desk booking is selected at the Vectron POS as a payment option. The POS then transmits the individual items with their characteristics (quantity, price, VAT, discount, ...) to Lodgit Desk, where they are added to the booking as extra items.

Configuration of the POS

Lodgit Desk communicates with Vectron via the scripting plug-in from version "VGPMS T.120"

To use the Vectron interface with Lodgit Desk, a valid license for the **add-on module "Interface EPOS Systems"** is required. First activate the interface in the settings of Lodgit Desk. It may be necessary to restart Lodgit Desk.

Your Vectron POS must have the **VGPMS interface**. In the Vectron POS you have to set the configuration in the.ini file. This configuration file can be accessed differently depending on the Vectron system. In version 6.3.5.0 of "Vectron POS PC", for example, it can be reached by the following means:

Chief Function> Mode> 4. Program> 12: Scripts/Macros> 2: Script directory> .ini File

The following network settings have to be set:

- IPAddr - IP address of the PMS server (Lodgit Desk)
- Port - Port number of the PMS server (Lodgit Desk)
- POSServerIPAddr - IP address of the POS system (cash register)
- POSServerPort - Port number of the POS system (POS)

Please set the IP address of the computers, where Lodgit Desk and Vectron POS PC are running, manually and not automatically. Otherwise, the connection may fail after restarting one of those computers.

It is important to set the setting "useTransactionSubNo" to match the version of the VGPMS scripts.

- Up to VGPMS script version 1.6: "useTransactionSubNo" has to be set to "false". Otherwise, the wrong bills will be canceled when canceled by the Vectron POS.
- For VGPMS script version 1.7 or newer, the setting must be set to "true". Only from version 1.7 the cancellations of separated bills can be assigned correctly. With previous versions bills may not be separated!

For the buttons "Bar", "VGPMS Room", "VGPMS Member" and "VGPMS Offline" to work properly, the following settings must also be set:

- MediaRoom = 7
- MediaMember = 8
- MediaCard = 9
- MediaOffline = 10

To speed up the processing of cash payments, you should set the "transferOnlyHotelMedia" setting to "true".

Make payment using the hotel financial method

After selecting the articles in the Vectron POS, click on Payment> VGPMS financial channels. Only the financial channel that posts to the room is relevant for you. There you have a choice of options, of which only **"VGPMS Room"** and **"VGPMS Member"** fulfil a function. Under Room you can search for the short description of a room in Lodgit Desk and under Member you can search for a booking number. You will then receive a selection of found guests, from which you can choose the right one. If you want to search for a name, choose Chef-Fkt. VGPMS > functions> Search Guest.

With the button **"VGPMS Room"** you can enter the title and short name of a room to find a booking. With the button **"VGPMS Member"** the name of a guest is accepted instead of a "MemberID". To combine the search for a room with the surname of a guest, you can use the Search Guest function under Chef-Fkt. > VGPMS Functions > Search Guest and then complete the payment via **"VGPMS Room"** or **"VGPMS Member"**.

Settings in Lodgit Desk

To activate the interface in Lodgit Desk, you must have the license for the interface: POS systems. As soon as the settings window is closed, the settings made here become active.
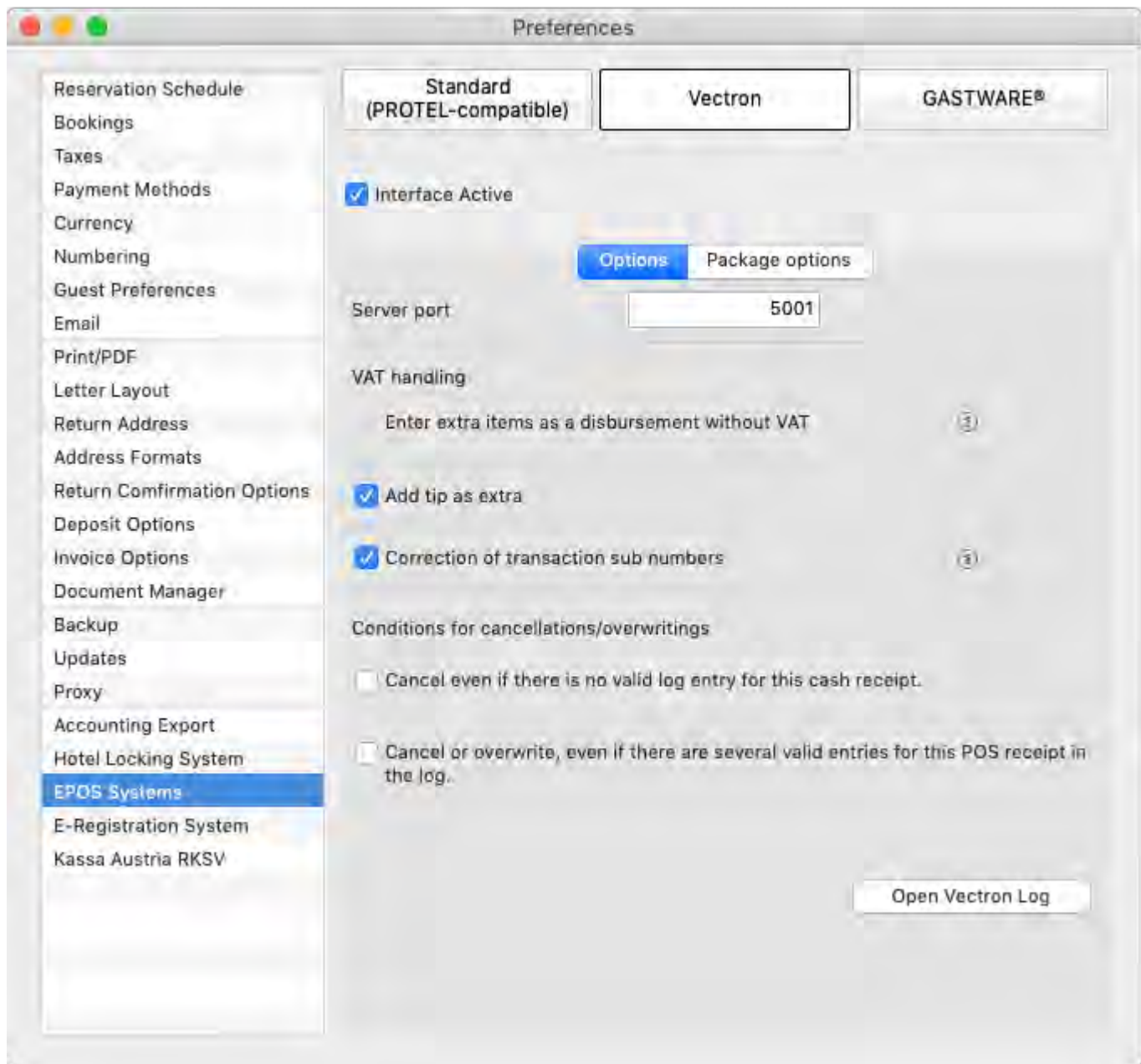
Interface active

Activate/deactivate the interface to the Vectron POS system.

Port

Here you set the port on which the server for the interface in Lodgit Desk is to be operated. This port must be entered with the IP address of the computer in the .ini file of the Vectron cash register. The default port is 5001.

Handling VAT

The items of the cash register are transferred by Vectron as a delivery note including VAT.

Tips

Here you can set the procedure to be followed when a tip is booked on the room bill in the POS system.

You can create an extra item for this, just like for other articles. If you have an extra item created and want extra items to be treated as a service with VAT, you can also define a VAT rate for the tip.

Correction of transaction sub numbers

The transaction sub numbers which the Vectron POS sends in case of cancellations differ from the transaction sub numbers of the corresponding bills. To ensure that the cancellations can still be assigned, Lodgit Desk corrects the transaction sub numbers.

If your version of the Vectron POS makes this correction itself, you should deactivate the correction in Lodgit Desk.

Conditions for performing cancellation/overwriting

Here you can specify whether a cancellation/overwriting is to be carried out in the two exceptional situations described, despite contradictory log entries. Warning: These errors do not occur for nothing and bypassing them does not solve the original problem. Please read the note "Mark log entries as obsolete" below.

Explicit request for payment details

If your Vectron POS is running an older version of the VGPMS script, it might be necessary to check this option so that items can be successfully transferred to a booking at all. For Vectron EPOS system with the latest script version, this setting should be deactivated as otherwise items might be transferred twice.

Ignore 0€ items

If you use 0€ items for internal administrative purposes but to not want them to be shown on the invoice, you can activate this setting.

Package options

Here you can specify whether extra items of an invoice are to be combined in one package. This results in better oversight. You can also define your own package name with placeholders for the most important values. All placeholders are listed and can be added by double-clicking on them.
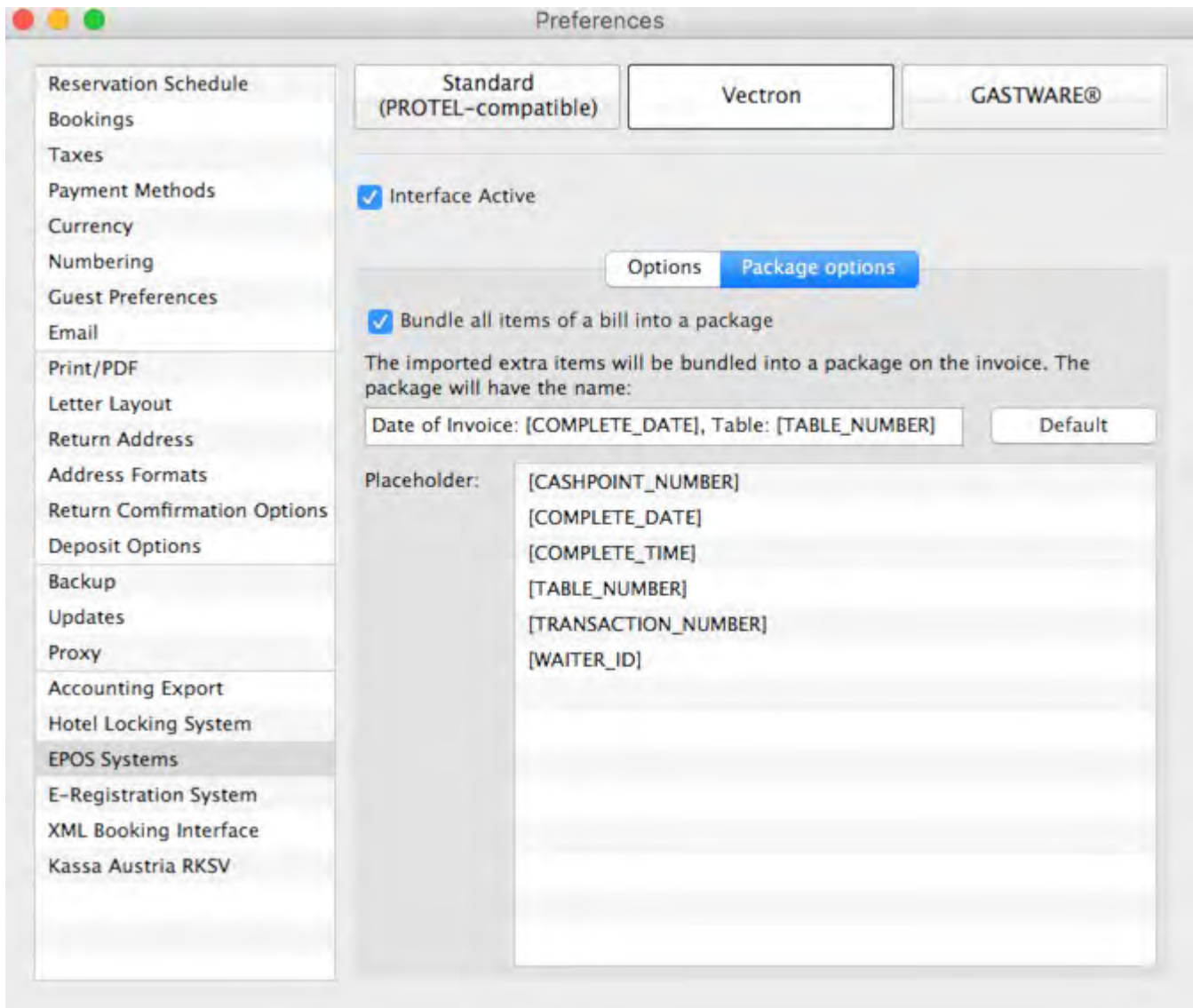
Extras

By default, the transferred items are assigned to the collective extra item "POS systems". If you wish that the positions transferred from the cash desk correspond to a concrete extra item from the extras management, then the services and products from the Vectron cash desk must be entered in the extras management within Lodgit Desk. The "Name" field must contain the number of the product in the cash register, and the name from the cash register under "Title":

Price and tax rate will be imported from the EPOS system. As the price unit, please select "per piece".

Open Vectron Logs

A click on the gear wheel opens a list of Vectron log entries. Below you will find instructions for this window.

Vectron Logs

You can access the Vectron logs via Preferences> Cash register systems> Vectron> Gear wheel (bottom right).
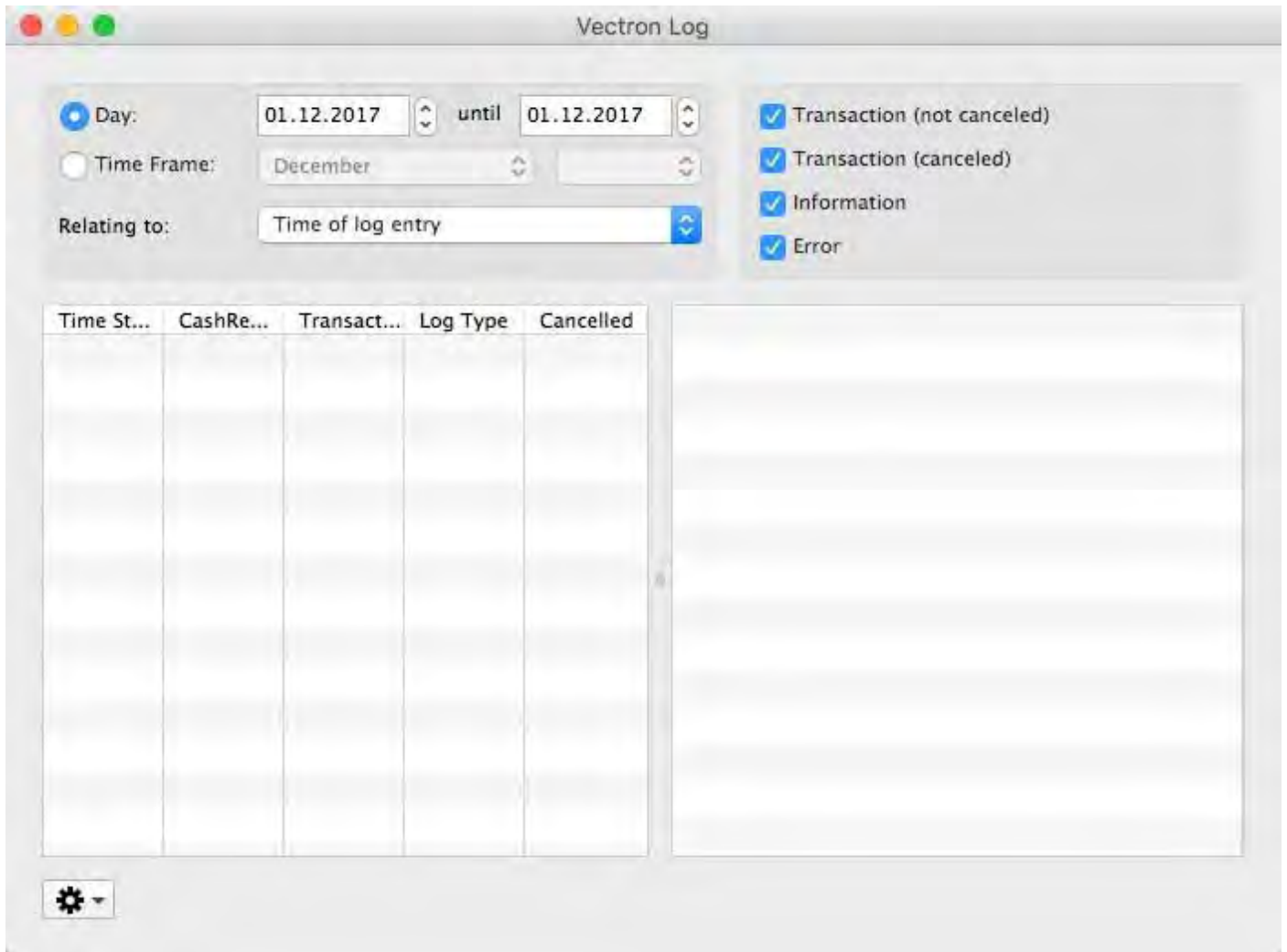
Filter

Here you can filter by log creation date, transaction date, or cancellation date. You can also select which log types you want to see (described below). For transactions, you can distinguish between reversed and non-canceled transactions.

List of log entries

This list shows all log entries that correspond to the current filter settings with their most important properties. Clicking on a log entry displays details about it in the right field. It is possible to mark several entries in order to perform different actions with them (described below). Obsolete entries (described below) are highlighted in red in the list if they are to be displayed.

Details of the selected entry

This field displays all available information for a selected log entry.

Actions

You can perform different actions using the gear wheel and by right-clicking an entry. You can display or hide obsolete entries and mark/unmark them as obsolete. You can also rewrite or cancel a transaction's extra items if you accidentally deleted or edited them in Lodgit Desk. Otherwise, it is recommended that you create cancellations and new invoices at the POS to keep both systems in sync.

Log Types

Transaction

A transaction as a settlement or reversal between the POS and Lodgit Desk.

Error

As soon as an error occurs, it is saved with the number and message. Most errors are also displayed in the cash register.

Information

If an overwrite/cancellation has been carried out despite duplicate or non-existent log entries, or if an error caused by a timeout has been bypassed by Lodgit Desk, this is saved.

Error prevention and notes

Version

Lodgit Desk supports the VGPMS script version "VGPMS T1.20" and was tested with version 6.3.5.0 of Vectron POS PC.

Handling VAT

With the Vectron version VGPMS T1.20 the cash register no longer handles the tax of items transferred to a hotel room. Thus the items will be entered in Lodgit Desk with VAT.

Dealing with time outs

If you see a timeout in the POS system, just try sending the invoice again. In order to avoid time outs to the greatest extent possible, you should ensure that you have Lodgit Desk in the foreground and increase the ReadTimeout value in the .ini file of the POS system (e. g. to 30 seconds).

Mark log entries as obsolete

If the dataset of invoices in the cash register has changed, for example due to a new installation of the software or a change of the cash register, problems can occur. In this case, the old log entries should be marked as obsolete in the "Vectron Logs" window. Lodgit Desk will ignore them.

Using the database server

The Vectron POS can only communicate with one instance of Lodgit Desk at a time. If you use Lodgit Desk on several computers and synchronise via a database server, you have to specify one computer with Lodgit Desk, which should take over the complete communication with the cash register. The Lodgit Desk on this computer must always be accessible to the POS. The instances of Lodgit Desk on other computers receive the data the next time they are synchronised with the database server.

Connection between Lodgit Desk and Vectron cannot be established

This error can have many causes. First, make sure that you have completed all the steps under "Setup". Then check the following points:

- Is the "Vectron" cash register interface activated in the Lodgit Desk settings?
- Is the Vectron software and the Vectron license up-to-date?
- Are the IP address and port of the PMS server (Lodgit Desk) correctly entered in the.ini file of the Vectron software?
- Has the IP address of one of the computers (PMS or POS) changed in the meantime?
- Are both computers on the same network? Pay particular attention to unintentional switching between different wireless networks.
- Does a firewall on one of the computers block the connections between Vectron and Lodgit Desk?
- Do other devices (routers, etc) block the connection between Vectron System and Lodgit Desk?
- Is the script plugin "VGPMS" correctly implemented in Vectron and ready to work?

Testmode/ Test waiter

Vectron only transfers the actual restaurant consumption to a PMS via the VGPMS interface. Vectron does not transfer transactions which are carried out when the Vectron cash register is in test mode or the test waiter is logged in.

Separate function of the cash register

The separation function in the Vectron POS can be used to divide the restaurant consumption e.g. between different guests/rooms. The separation and cancellation of separated invoices will only work properly under the following two conditions:

- the VGPMS script of the Vectron POS is version 1.7 or higher
- in the configuration of the VGPMS script, the setting "useTransactionSubNo" is set to "true

Otherwise only the last part of a separated invoice will be saved or cancellations will be assigned to the wrong bills.

The deletion for cancellations is only not carried out if the corresponding items have already been settled in a final bill and are flagged as "Settled" within the posting.

Error: The restaurant bill is added to a booking twice

Untick the "Explicit request for payment details" checkbox in Lodgit

Error: The restaurant bill has been transferred but does not show up in the extra items of the booking

In this case you might be running an older version of VGPMS on your Vectron device and have to activate the "Explicit request for payment details" setting. Future transfers should then be assigned correctly. You may find the unassigned bill in the Vectron log and can reassign it by right-clicking it and selecting the respective function.

Error: The buttons "Bar", "VGPMS Room", "VGPMS Member" and "VGPMS

Offline" don't react as expected

Please make sure that the MediaRoom, MediaMember, MediaCard and MediaOffline settings are set as described under "Configuration".

Error: Wrong bookings are getting canceled

Please make sure that you have set the setting "useTransactionSubNo" to "true" as of VGPMS script version 1.7 and follow the instructions under "Separate function of the cash register".

ERROR LOG   UP   INTERFACE "GASTWARE"

EPOS-System "GASTWARE"

The interface "GASTWARE" enables the automatic addition of sales from your electronic point of sales to Lodgit Desk. The turnovers are automatically assigned as extra items to the corresponding booking. If sales cannot be added automatically, Lodgit Desk displays them in an error log for further manual processing.

Preferences

To define the preferences for the "GASTWARE" interface go to:
Windows: Edit > Preferences > EPOS Systems
Mac OS X: Lodgit Desk > Preferences > EPOS Systems
and select the interface "GASTWARE".
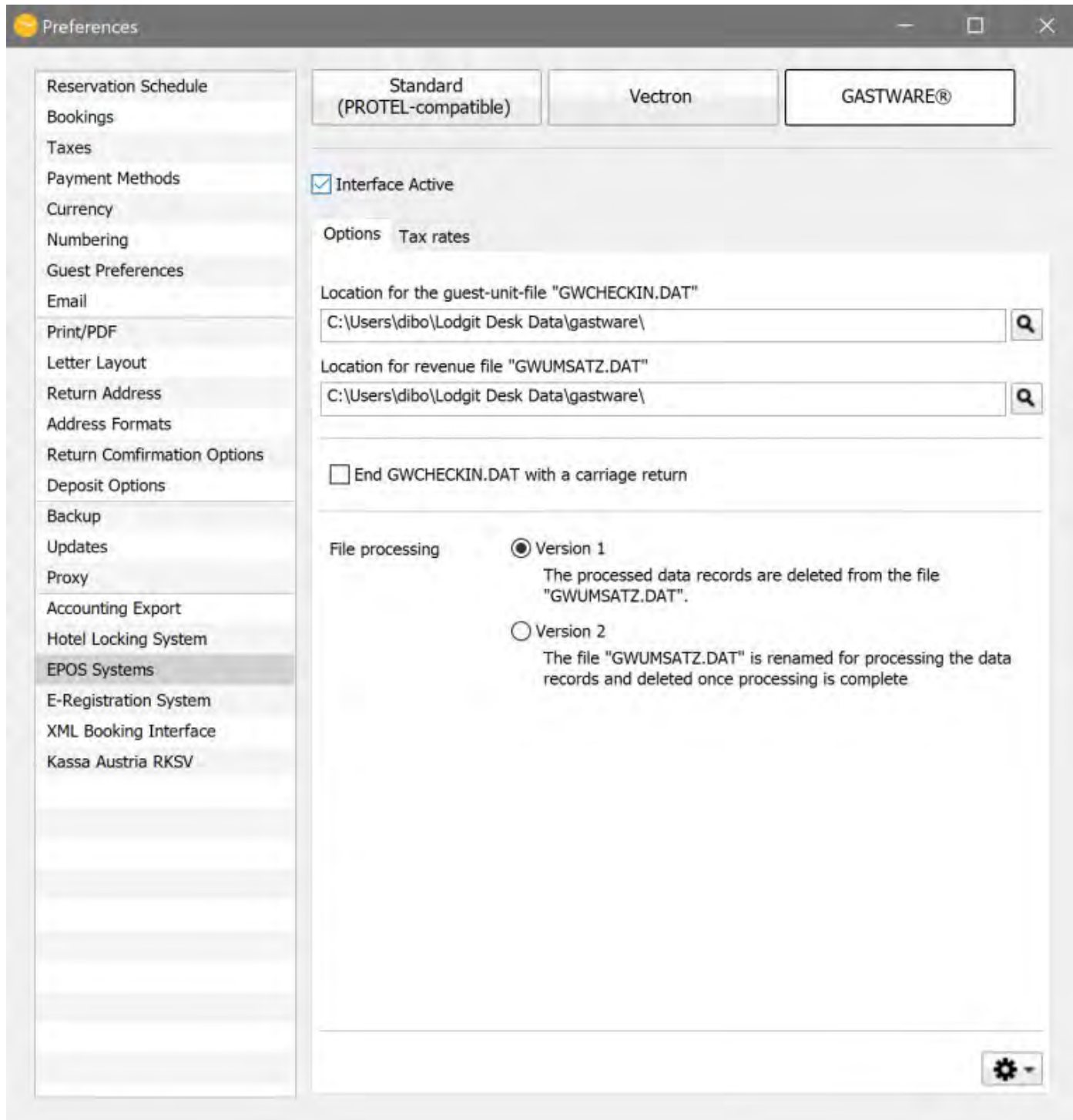
Options

To use the interface properly the following things are necessary.

Interface Active

This activates or deactivates the interface. If the interface is deactivated, no guest-unit-file is created and no bookings are being analysed.

Location for the guest-unit-file "GWCHECKIN.DAT"

This is the location where your software expects the file "GWCHECKIN.DAT". This file is automatically created by Lodgit Desk and contains a list of all currently checked in guests. This location can be on a network, but Lodgit Desk needs to be allowed to write in this location.

Location for the revenue file "GWUMSATZ.DAT"

This is the location where your software expects the file "GWUMSATZ.DAT". This file is automatically created by the gastronomy software and contains a list of sold products and services (revenues). This location can be on a network, but Lodgit Desk needs to be allowed to write in this location.

Carriage Return

The check mark activates the automatic insertion of an additional carriage return, i.e. an additional empty line at the end ofGWCHECKIN.DAT. You can find out if you need to check the box by checking that all checked-in guests are displayed. If this is not the case, please check the box.

File processing

Select the version that your EPOS system supports.

Actions Menu

The guest-unit-file and the revenue file will automatically be created and analysed by the software and Lodgit Desk.

Using the Actions Menu [⚙▾] you can create the guest-unit-file and the revenue file manually to check if and how it works. You can also use this menu to open the error log.

Create guest-room-file GWCHECKIN.DAT now

Analyse revenue file GWUMSATZ.DAT now

Open error log
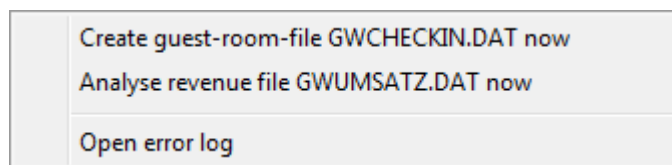
Tax rates

VAT rates

Assignment of the three VAT rates "Full", "Reduced" and "None". All three must be assigned. Value-added tax rates can be assigned under
Windows: >Edit >Preferences >Taxes
Mac OS X: >Lodgit Desk >Preferences >Taxes

INTERFACE VECTRON   UP   KASSENSICHERUNG

Kassensicherung (English Description)

Lodgit Desk offers an additional module for the connection to cash register security systems (Kassensicherung) in Germany and Austria. For Austria we connect the software using cBird, for Germany we use technical security devices from Epson. These connections are necessary for the software to be legally compliant in operation in these respective countries.

The module includes:

- Kassensicherungsverordnung 2020 (DE, TSE)
  - Putting the TSE into operation
  - Setting up the TSE and activating the interface
  - Working with the TSE
    - Status Messages of the TSE
    - Expert Mode
  - TSE-Export
  - FAQ
    - Moving the TSE to a new computer
    - The certificate of my TSE has expired - What do I do now?
    - Performing firmware updates for the Epson TSE receipt printer TM-m30F
    - Connection to local IP address not possible
    - How do I get to the TSE Wizard again?
    - Unlock and change PINs and PUK
    - Status message "Not Authorised"
  - Kassa Austria RKSV (AT, cbird)

The Lodgit Desk module "Kassa-Austria (RKSV)" has been expanded to include the functions required by the German KassenSichV (also known as 'Kassensicherung').

Nothing changes for our Austrian customers who have already purchased the Kassa Austria RKSV module. Customers from Germany who want to connect a TSE due to the KassenSichV must purchase the module "Interface Kassensicherung" from the Lodgit shop..

Kassensicherungsverordnung 2020 (TSE) in English

With the cash register regulation 'Kassensicherungsverordnung' the government wants to prevent manipulation in the handling of cash. Since 01.01.2020, only cash registers with a certified technical security device (TSE) may be sold. According to the current interpretation of the Kassensicherungsverordnung, this also affects Lodgit Desk, as cash invoices and receipts can be created with Lodgit Desk. The TSE communicates with the cash register for every business transaction and saves data so that it can be evaluated in the event of a later audit.

The Bundesfinanzministerium (Federal Ministry of Finance) has answered frequently asked questions about the Cash Security Ordinance on its website. Here it says, among other things:

> **Are cash sales, for example, in an inventory management or hotel software to be protected via TSE?**
>
> No. 2.1.4 of the AEAO to § 146 defines: "An electronic recording system is the hardware and software used for electronic data processing that creates electronic records for documenting business transactions and thus basic records". Thus, the systems in question are clearly "electronic record keeping systems". As soon as the systems are able to record and process cash payment transactions, the corresponding part of the software - but not the entire system - falls under the requirements of § 146a AO in conjunction with the KassenSichV.

Set up and operate a TSE with Lodgit Desk:

Putting the TSE into operation
Setting up the TSE and activating the interface
Working with the TSE
- Status Messages of the TSE
- Expert Mode
TSE-Export
FAQ
- Moving the TSE to a new computer
- The certificate of my TSE has expired - What do I do now?
- Performing firmware updates for the Epson TSE receipt printer TM-m30F
- Connection to local IP address not possible
- How do I get to the TSE Wizard again?
- Unlock and change PINs and PUK
- Status message "Not Authorised"
Kassa Austria RKSV (AT, cbird)

Putting the TSE into operation

Requirements

To connect the TSE with Lodgit Desk, you'll need the additional module KassensichSichV TSE.

To activate the additional module, open Lodgit Desk & go to the menu item Administration > Additional modules > KassenSichV TSE.

Click on "Purchase licence now" in the window that opens.

⚠ Please purchase the additional module "Fiscalisation (DE: KassenSichV, AT: RKSV)" to unlock this feature.

Purchase License Now
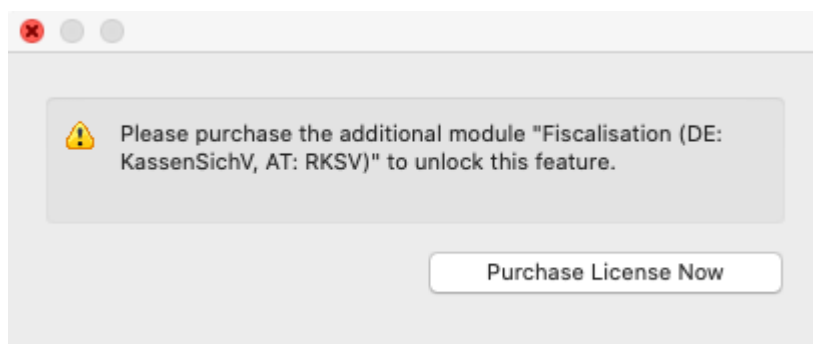
You will then be redirected to our shop. Here you can purchase the additional module by clicking on the button "Select" at the interface "Interface: Fiscalisation (DE: KassenSichV, AT: RKSV)".

After purchasing the add-on module, you still have to update your Lodgit licence under File (Windows) or File (macOS) > Software Activation > via button "Update licence info".

> In order to be able to use the additional module "POS security", you also need TSE hardware (USB stick, receipt printer or server from Epson), learn more about which products are available.

Default settings

Installation

To operate the TSE, certain drivers or an update of the firmware of your receipt printer or TSE server must be installed. The TSE can only be controlled by Lodgit Desk if the corresponding device settings have been made by you in advance. The preliminary steps differ depending on the TSE hardware you are using.

Please select your TSE hardware and carry out the necessary steps:

TSE-USB

TSE Receipt Printer

TSE Server

Find out the IP address of your TSE

Epson always accesses the TSE via a network interface. Therefore, it is necessary to find out the IP address of your TSE.

- For a USB TSE, the IP address is localhost. If this does not work, enter the IP address 127.0.0.1.
- To find the IP address of the network TSE (receipt printer or server), first make sure that your machine is properly connected to your network.
  - Usually a router assigns an IP address to your TSE hardware. Check within your router configuration which hardware is present in the network. With most routers, you can display in the administration interface which devices are currently connected to which IP.
  - The Epson receipt printers print out their IP address received via DHCP at start-up.
  - Epson's published **app** for Android or iOS can help you discover Epson devices (and their IP address) on your network.

If possible, assign a fixed IP to your TSE in the router.

Next Page >

Kassensicherungsverordnung 2020 (DE, TSE)   Up
Setting up the TSE and activating the interface

Initialisation of the TSE and activation of the interface

The TSE is delivered to you uninitialised. As soon as you have connected the TSE to your computer and it is ready for operation, you can start initialising it in Lodgit Desk. The TSE assistant of Lodgit Desk will help you with this. During initialisation, all the data necessary for operating the TSE is defined in the wizard.

User PIN (5 digits); can be composed of letters (a-z, A-Z) and/or numbers (0-9), no special characters.	This is requested during the use of the TSE for identification - it is set by yourself
Admin-PIN(5 digits); can be composed of letters (a-z, A-Z) and/or numbers (0-9), no special characters.	For all administrative processes such as TSE export or changes to the TSE - is to be set by yourself
PUK (6 digits)	To unlock PINs - set by yourself
Security key (Sicherheitsschlüssel) (8 digits)	Is required for authentication - is to be set by yourself
Point-of-sale-ID (Verkaufsstellen-ID) (max. 30 digits)	Generated by Lodgit in the wizard and represents your Lodgit Desk database; required for regulatory registration of the TSE - generated by Lodgit for you during the initialisation process in the wizard.

When you open Lodgit Desk for the first time after installing the TSE, a window opens informing you that the use of a certified security device (TSE) is mandatory for properties in Germany.

You now have the option of starting the TSE wizard or cancelling the process. If you intend to cancel the process, please note that since 1.1.2020 it is a German legal requirement to use a TSE with any software that can process cash payments.

Click on the **Lodgit Desk > Settings** button to access the Settings > KassenSichV TSE menu. Here you can set up the TSE or activate the additional module yourself, without using the wizard. This assumes that the data to be entered already exists or has been detected.
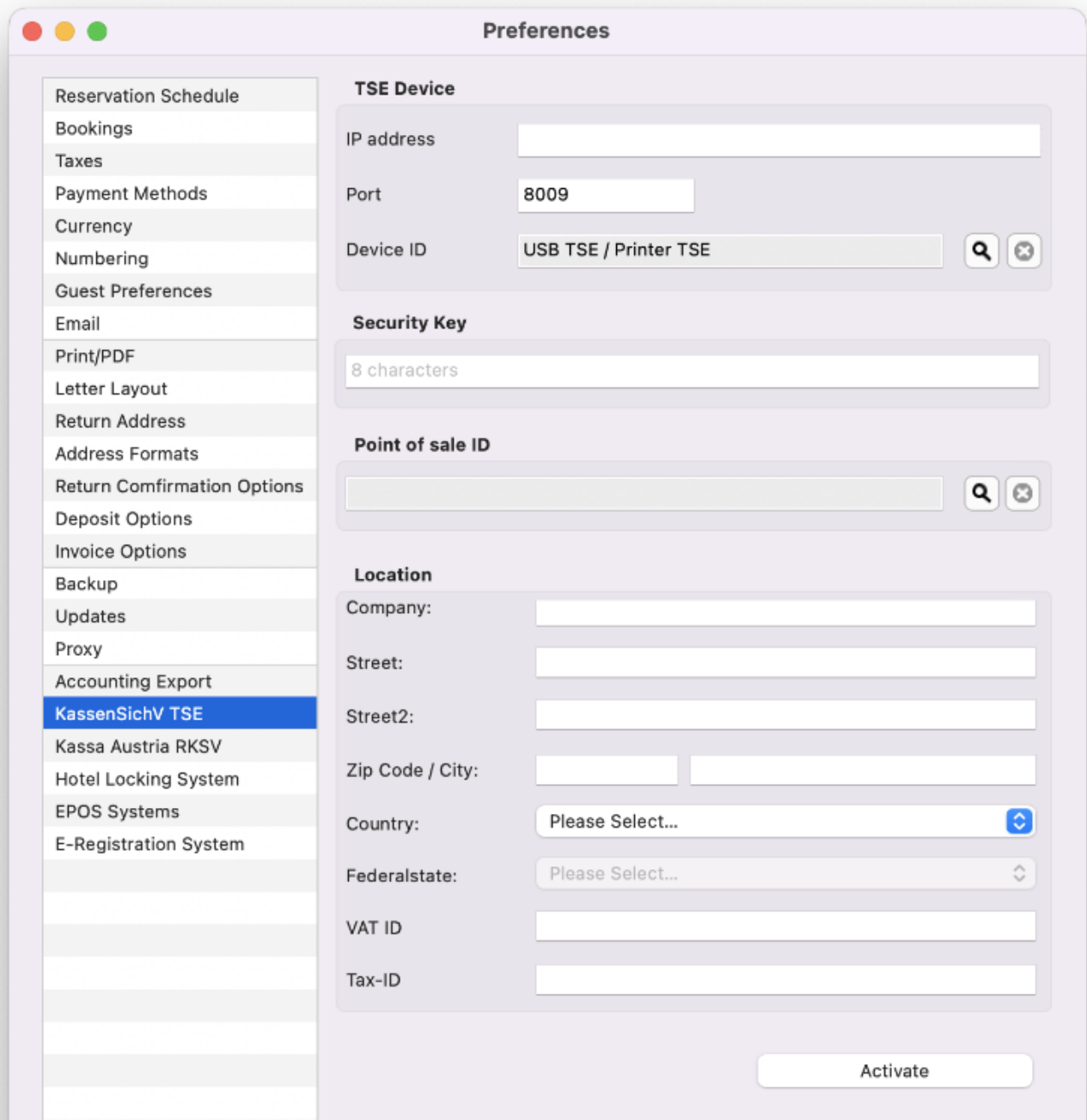
Initialising an uninitialised TSE with the TSE Wizard

Open **Lodgit Desk > Administration > Additional Modules > KassensichV TSE** and then choose **TSE Wizard**.
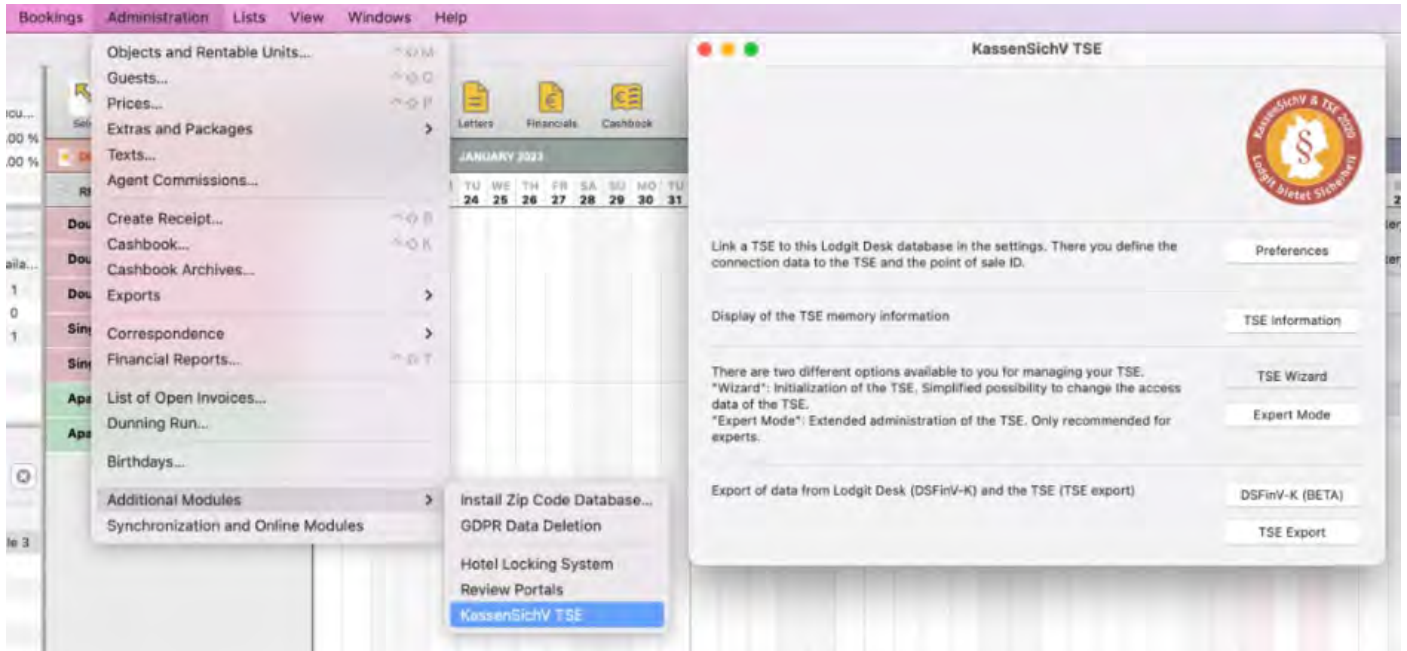
1. Select TSE: Enter the IP address of your TSE here and select the type of your TSE via the drop-down menu on the right. Then click on the button "**Search for available TSE devices**" to select the available TSE. Then select the appropriate TSE from the drop-down list. If you are using a receipt printer or a USB stick as a TSE, the device ID is always "local_TSE". If you are using a TSE server, after you have clicked on the button "**Search for available TSE devices**", the TSE IDs available on the server will be displayed. Please select the correct one.
Then click on "**Connect**". The data will now be checked. If this is successful, you will be taken to point 2.
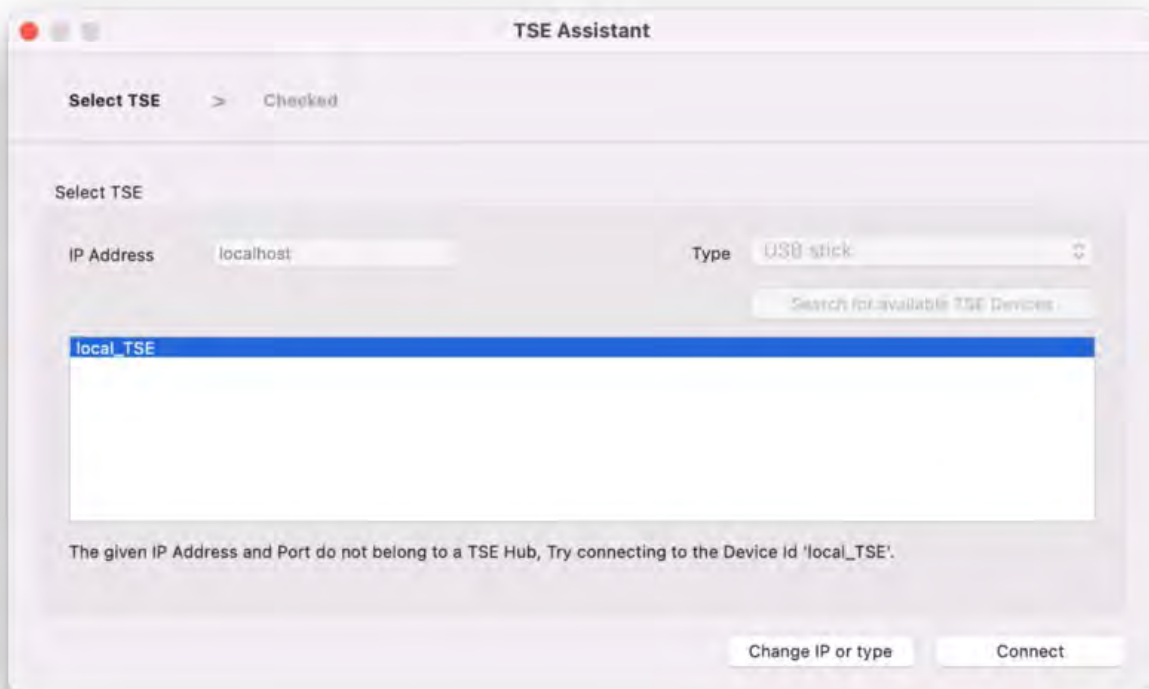
2. PIN, PUK: Here you can enter the User PIN, the Admin PIN and the PUK. Then click on **"Next".**

3. Security key: Here you assign a security key for your TSE yourself. This is used together with the PINs (User, Admin) to log in to the TSE. Once the security key has been entered, click on **'Next'**.

4. Point of Sale: Here the point of sale ID is automatically generated by Lodgit. To do this, click on the **"Generate" button.**

5. Initialisation: As soon as the outlet ID has been generated and is displayed, click on the button "**Execute initialisation**".
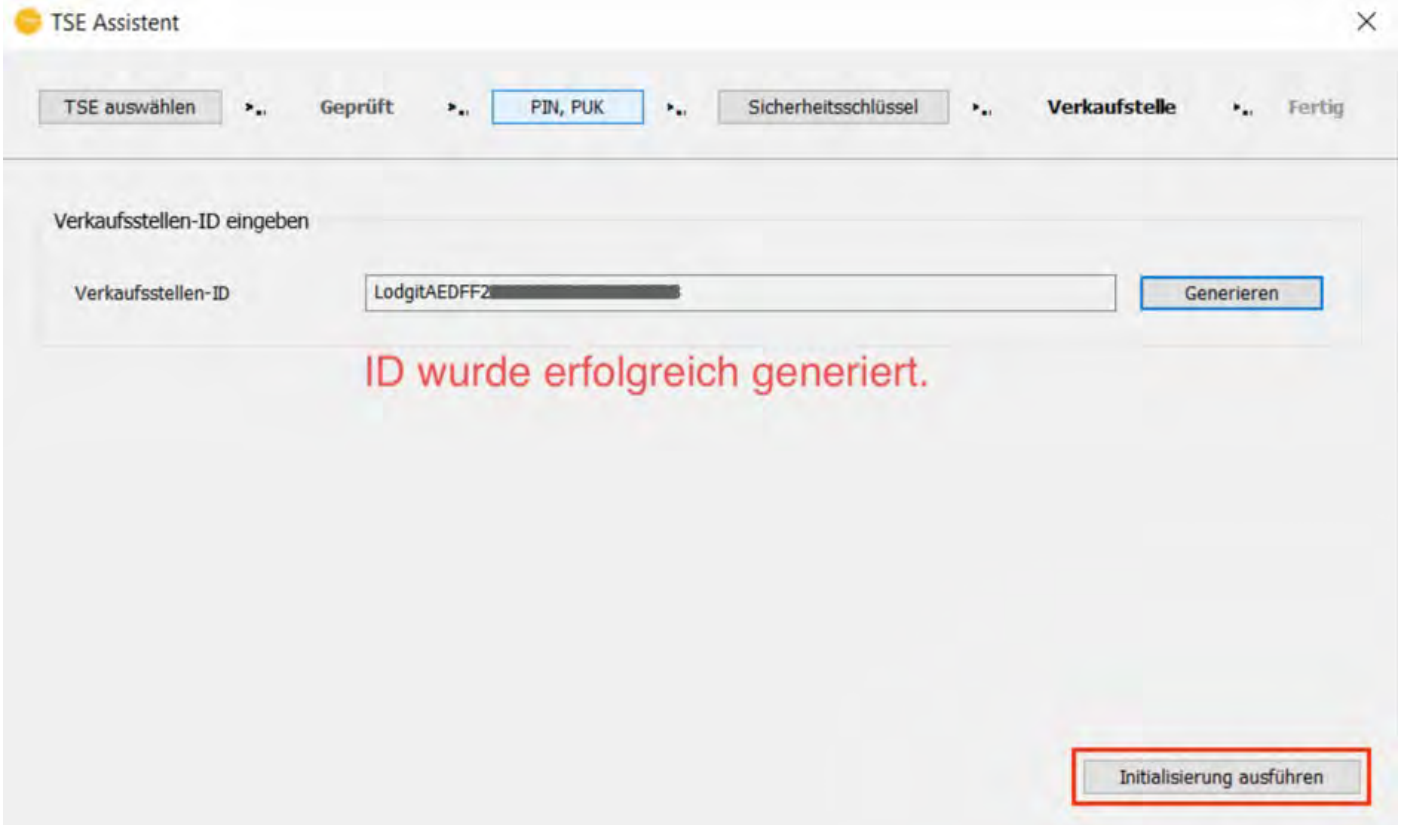
ATTENTION: The initialisation of the TSE is carried out. This process may take a few minutes. Please do not switch off Lodgit Desk or the TSE during this time. Do not put the computer into sleep mode.

A message will then appear stating that your TSE has been successfully initialised (TSE erfolgreich initialisiert!).

Please make a careful note of the **User PIN, Admin PIN, PUK, Security Key** and **Point of Sale data** displayed in this window, as you will need them to work with the TSE. You will need the point of sale ID to register your TSE with the authorities.

The data entered in the wizard is automatically transferred to Settings > KassenSichV TSE, where you can complete the activation of the TSE. To get to the settings, click on the button "**Close wizard**".

Please check in the settings whether the pre-filled data matches the data from the wizard that you should have noted down.

If all the data is correct, click on the "**Activate**" button. The data will be checked. If this is successful, the login window opens. Enter your previously assigned user PIN here.

After the data has been successfully checked, the interface is active and the "**Activate**" button changes to the "**Switch off**" button.

From now on, your invoices will be signed with the TSE.

Setting up an already initialised TSE

If your TSE is already initialised, please go to the following menu item in Lodgit Desk:

Windows: Edit > Settings > KassenSichV TSE
Mac OS X: Lodgit Desk > Settings > KassenSichV TSE
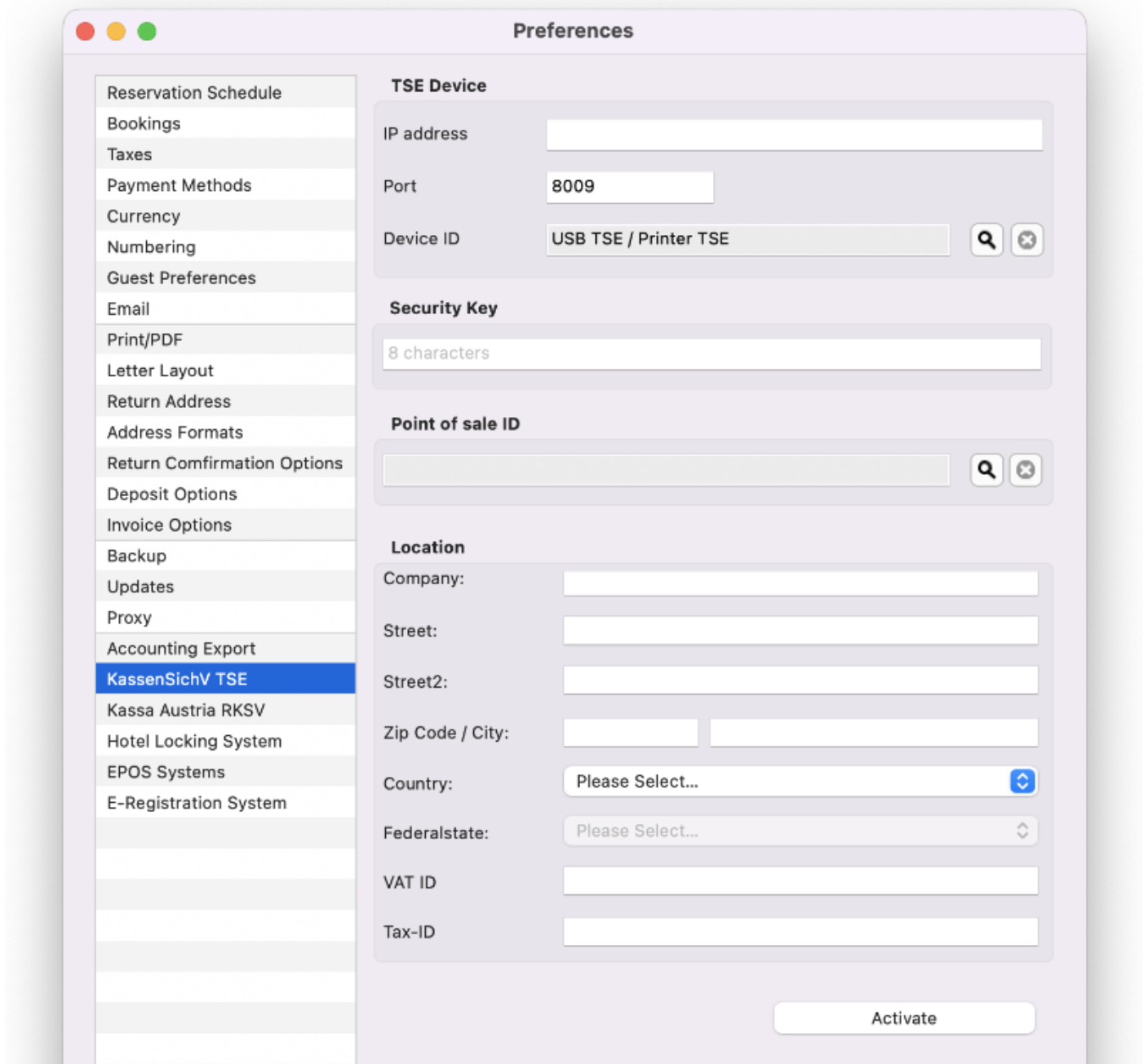
Enter the IP address and port of your TSE here. The port used by Epson as standard is always 8009.

To determine the device ID, click on the magnifying glass button. If you use a receipt printer or a USB stick as a TSE, the device ID is always "local_TSE". If you are using a TSE server, after you have clicked on the magnifying glass button, the TSE IDs available on the server are displayed. Please select the correct one and click OK.
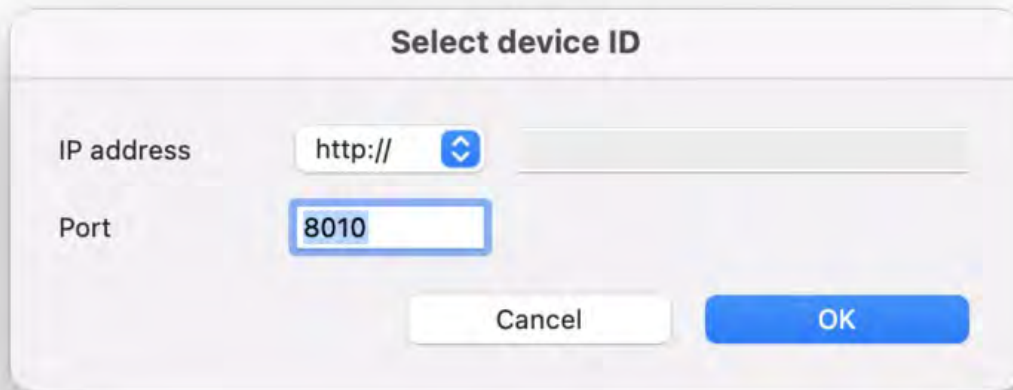
Enter the security key of your TSE below.

Next, the point of sales ID ("Verkaufsstellen-ID") must be determined.

To determine the "**point of sales ID**", click on the magnifying glass button under the corresponding item "Point of Sales ID". The window for determining the sales outlet IDs on the TSE opens. First enter the Admin PIN.
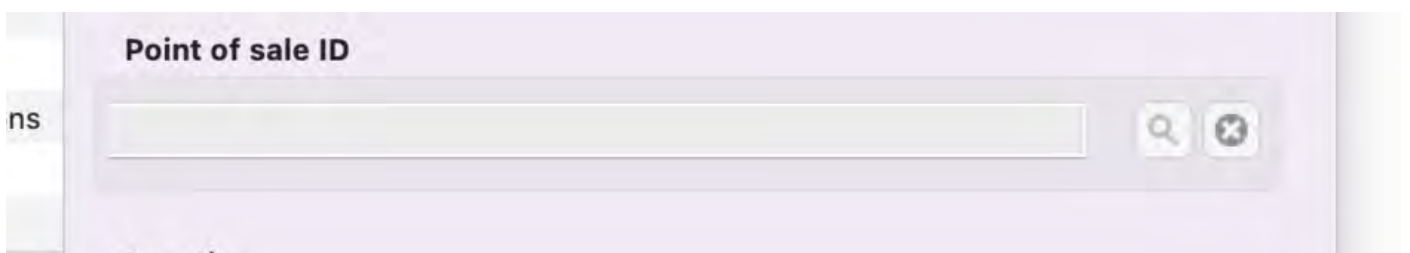
Then click on **"Query"** (Abfragen).

It is now determined whether and which sales outlet IDs are already registered on the TSE. If there are outlet IDs on the TSE, they will be displayed in the drop-down menu. Only outlet IDs that begin with the word "Lodgit" will be displayed. Select the desired outlet ID and confirm it with **OK**.
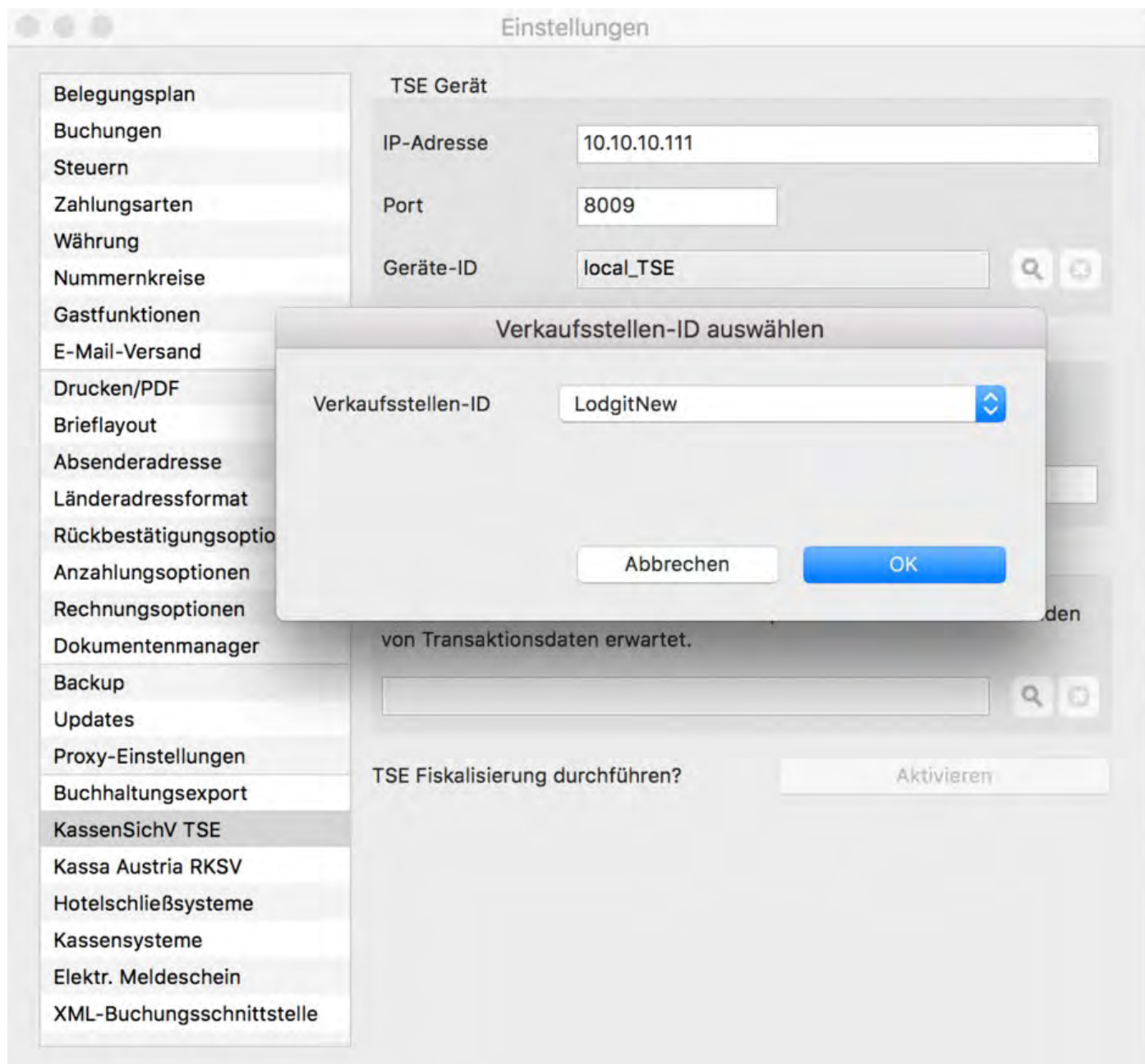
If there are no Lodgit outlet IDs on the TSE yet, you can enter them via the TSE administration (Administration > Additional Modules > KassenSichV TSE > Expert Mode).
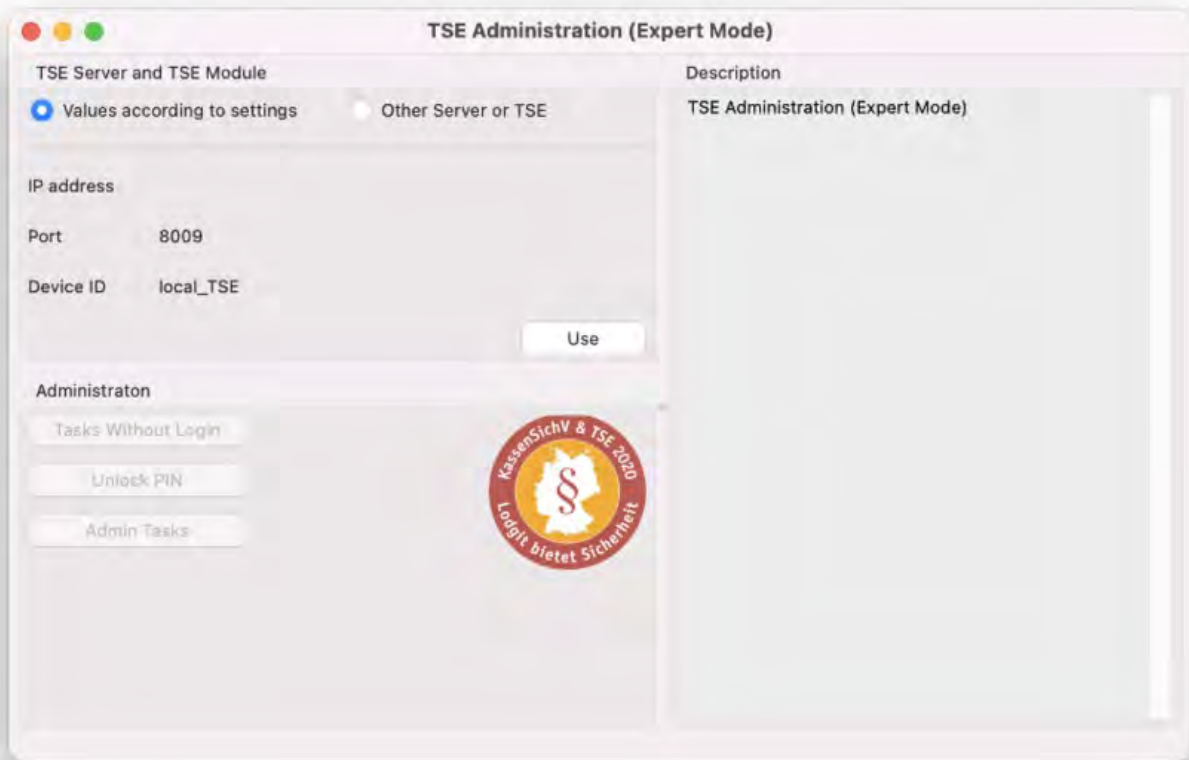
Once you have entered all the data, click on the "**Activate**" (Aktivieren) button. A connection test will now be carried out and the user PIN will be requested. If this is successful, the interface is activated and Lodgit will now send data to the TSE for signing your invoices.

NOTE: As soon as changes are made to the IP address, the "Unit ID" and "Point of Sale ID" fields are deleted. After re-entering the IP address and port, these must be determined again.

ATTENTION: If you also use the TSE for another cash register system, e.g. your gastronomy cash register, it is imperative that you have your own point of sale ID for Lodgit on the TSE. Under no circumstances may the point of sale ID of the other POS system be used. The point of sale ID is used to identify or register the respective POS system with the authorities.

<< Putting the TSE into operation <<

Setting up the TSE and activating the interface

>> Working with the TSE >>

Working with the TSE

Logging into the TSE

Every time you start Lodgit Desk, the login window of the TSE opens, where you have to enter your login data:
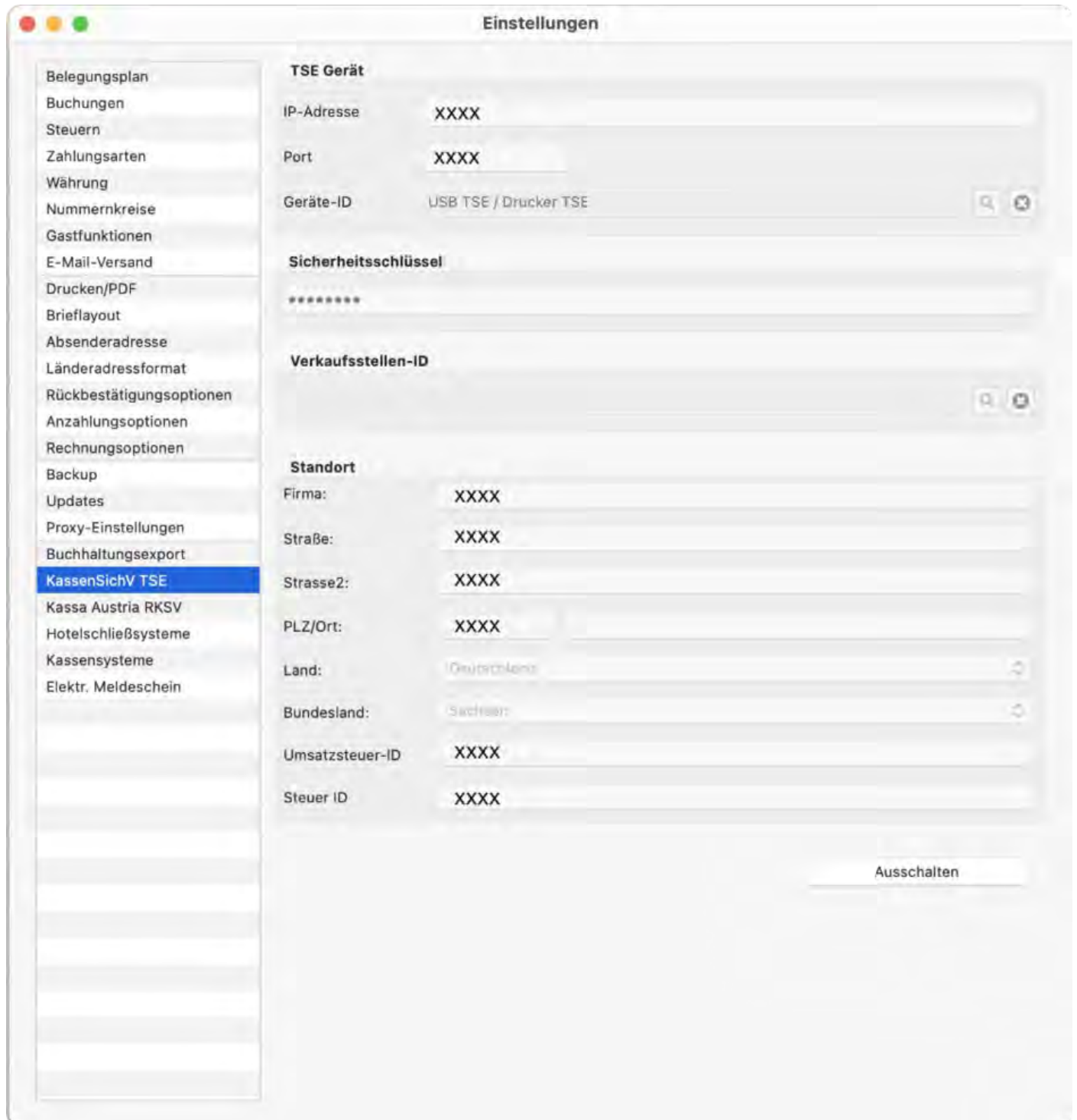
- Enter your User PIN here, which you assigned yourself during the setup

process.

- After that, click on the **OK** button. Lodgit Desk now opens with the message "Reception (local) / TSE Status - OK" visible in the title bar and the TSE button is displayed in yellow:

If you cancel the login process, do not enter your login data, or enter it incorrectly the TSE button will display a warning in red:

If you click on the red TSE button, the login window opens again and you now can enter your login data once more. After successful verification of the login data, the TSE is ready for use to fiscalize your invoices.

The login data will be requested again during the first transaction with the TSE. Without valid entry of the user PIN, no data is sent to the TSE (e.g. changes to a booking such as creating, moving or deleting).

Create Receipts

To print a receipt, go to "Print receipt ..." in the action menu.
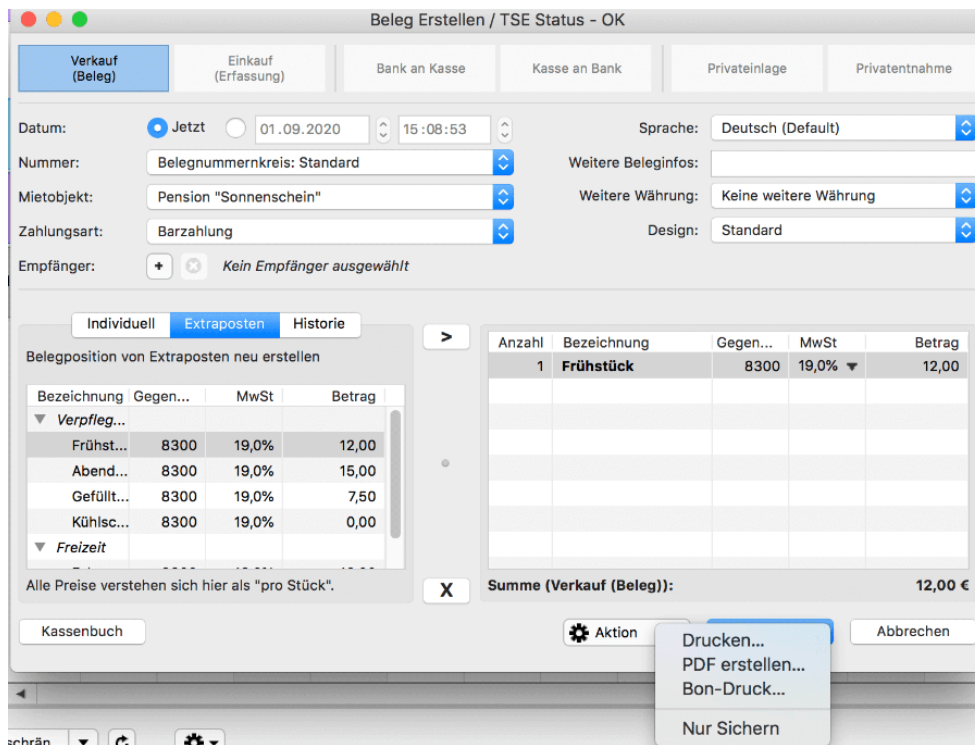
If you use a TSE in a receipt printer, you can also print receipts as long as no

recipient has been added for the receipt.

Printing Invoices

Invoices are printed via your standard printer as before in the past. The receipt printer cannot print invoices with invoice recipients etc, but only receipts similar to cash register receipts.
When you preview the invoice, no data is sent to the TSE yet, but only when the invoice is saved or printed.
At this moment the TSE window will open, where you have to enter your login data.

Note: There is no obligation to re-fiscalize. If problems occur when sending data to the TSE and no data can be transmitted, you do not have to retry. However, you have the obligation to document the occurrence of problems and thus the non-sending of data to the TSE. Thus, you can explain gaps in the TSE's records to the tax office in the event of an audit. The documentation must be done outside of Lodgit Desk. This is sufficient informally, as there are no specific forms or similar for this.

Schriftverkehr

In the Administration > Correspondence window under **"Invoices"**, there is a column for TSE, titled **TSE yes/no**.

Test Databank

The test database is considered as a pure "training database". Therefore, no data is sent to the TSE from the test database. Sending is done exclusively from the working database.

<< Setting up the TSE and activating the interface <<

Working with the TSE

>> Status Messages of the TSE >>

Status Messages of the TSE

In the menu bar of Lodgit Desk you will see a TSE button, which can be displayed in three different colours depending on its status: red, yellow and grey.

In addition, various TSE messages are displayed in the title bar. By clicking on the TSE button in the menu bar, you will receive further information and instructions:

The interface is deactivated or the TSE is not yet initialised

Message in window title (TSE status)	Message when clicking the TSE button	Explanation	Procedure
License expired	Message: The license to use the additional module "Cash Register Security (DE: KassenSichV, AT: RKSV)" has expired You can extend the license via our store Options: To the store - Opens the browser and shows the Lodgit online store.	You do not have a valid license for the "TSE Kassensich" add-on module.	Go to the Lodgit online store to purchase a valid license.
Interface deactivated	Notification: Using a TSE to fiscalize invoices and receipts. In Lodgit Desk there is the possibility to record cash payment transactions. Therefore, the use of a certified technical security device (TSE) is mandatory for Germany. Options: Go to the setup wizard - Open the "TSE Wizard" window	The interface has been disabled in the settings.	Click on the TSE button. A window opens through which you can go directly to the settings in Lodgit Desk to activate the interface.
TSE not available		There is no TSE present.	You must purchase a valid license and a TSE device for the "Kassensicherung" add-on module. You can find out how to connect the TSE here and

| Not initialised | Settings - Open the settings > "KassenSichV TSE" section | | activate here. |
| | | The existing TSE has not yet been initialised. | You must initialise the TSE according to the setup instructions. |

Everything OK. Invoices and receipts can be fiscalized

Everything OK. Booking-related order data is currently being sent to the TSE

An error occurred while working with the TSE

Message in window title (TSE status)	Message when clicking the TSE button	Meaning	Procedure
TSE connection data incomplete No point of sale ID No device ID No security key	Repeat of the Window title	The interface is active, but important connection data is missing	Open the Lodgit Desk settings. Go to the menu item "KassenSichV TSE". Deactivate the interface, if not already done. Enter the missing data. Activate the interface.
Connection to the TSE failed	Message: Connection to TSE not possible The device (DEVICE ID) with the address "IP:PORT" cannot be reached or does not respond. Either the connection data is incorrect or the TSE has not yet completed its startup process. Option: Retry - The connection test is	Either the IP address and/or port are incorrect or the TSE is currently unreachable	Please wait until the TSE is completely started and click on the TSE button to have the status checked again. If the IP address and/or port data is incorrect, you can correct it in

	performed again. Transaction data will not be sent again.		the settings under the "KassenSichV TSE" item.
Incomplete login information	Login window	The User PIN has not been entered after activating the interface or starting Lodgit Desk.	Click on the TSE button and enter the User PIN.
Login data incorrect	Login window	The specified user PIN is incorrect	Click on the TSE button and enter the correct User PIN.
Login data not yet validated	Repeat of the Window title		Please wait until the login data has been verified.
Self test is performed	Repeat of the Window title	The TSE self-test required by the TSE is in progress	Please wait until the self-test has been performed.
User PIN locked	Message: The User PIN is locked. The User PIN has been entered incorrectly at least 3 times and is now locked. You can unlock the User PIN in the "TSE Management" window. Option: TSE Administration - Opens the "TSE Administration" window, "Unlock PIN > User PIN forgotten?" section.	The user PIN was blocked after 3 incorrect entries by the TSE.	Unlock the User PIN using the PUK.
Point of sale ID not registered on the TSE	Message: Point of sale ID not registered The chosen point of sale ID "SALE ID" is not registered on the TSE. You can either: - Change the point of sales ID in the settings to a valid value. - Register the point of sale ID stored in the settings on the TSE. Option: TSE Administration - Opens the "TSE Administration" window, section "Admin functions > Register this point of sale". Settings - Opens the settings. CashSichV TSE" section	The point of sale ID entered in the database does not exist on the TSE	Register the outlet ID on the TSE or correct the outlet ID in the settings to a valid value. You can find out the outlets available on the TSE via the TSE administration.

TSE Error (Not Authorised)	Message: TSE error "TSE1_ERROR_NOT_AUTHORISED". The TSE error "TSE1_ERROR_NOT_AUTHORISED" is an internal error in the TSE itself. Further information about this error and how to proceed is described in our documentation. Option: Lodgit Desk Help - Opens the browser and loads Lodgit online help.	This is an internal error on the TSE itself	Proceed according to the instructions.
Please wait! The TSE is not yet available.	Message: The status of the security module is "UNKNOWN". Please wait! The TSE is not yet available. Please be patient and restart the verification in a few minutes. It is also possible that the TSE requires a self-test. Option: Retry - The connection test is performed again. Transaction data will not be sent again. TSE Administration - Opens the "TSE Administration" window, section "Functions without login > Perform TSE self-test".	The TSE has not started yet or the TSE needs a self-test	Please wait until the TSE is fully started and click on the TSE button to have the status checked again. It is also possible that the TSE requires a self-test.
Please wait! The TSE is not yet available.	Message: The status of the safety module is "EMPTY". Please wait! The TSE is not yet available. Please be patient and restart the check in a few minutes. Option: Retry - The connection test is performed again. Transaction data will not be sent again.	The TSE has not started yet	Please wait until the TSE is fully started and click on the TSE button to have the status checked again.
The TSE is blocked by another process	Message: The TSE is blocked by another process The device (DEVICE ID) with the address "IP:PORT" is currently blocked by another process. Please wait until the other process has finished working with the TSE and then try again. Option:	The TSE is blocked by another process	Please wait until the other process has finished working with the TSE and then try again.

	Retry - The connection test is performed again. Transaction data will not be sent again.		
Out of service	Repeat of the Window title	The TSE is no longer suitable for further use.	Please replace with a new one.
Error	Repeat of the Window title	Other error	

<< Working with the TSE <<

Status Messages of the TSE

>> Expert Mode >>

Overview of functions in expert mode

Functions without login	Storage information	Returns the data stored in the TSE.
	List of started transactions	Returns a list of started (incomplete*) transactions. * Incomplete status is the status where FinishTransaction was not executed for a transaction started with StartTransaction.
	Response to the last transaction	Returns the result of the last transaction stored in the TSE for each point of sale.
	Public key for the TSE signature	Requests the public key for the TSE signature. Returns the certificate that can be used to verify the signatures of all log messages created by the TSE. A PEM-data file is returned. This contains several certificates which are signed from the bottom (root certificate) to the top. The top entry is the TSE certificate.
	Perform TSE self-test	Performs a self-test of the TSE. After each power-up of the TSE, the self-test is required before you can work with the TSE again. The self-test checks if the internal module of the TSE is working properly. The printer automatically performs a self-test of the TSE each time it is turned on, so basically you do not need to perform the self-test manually. However, if the printer is used for 25 hours or more without being restarted, you must perform the self-test with this function every 25 hours. To determine the remaining time until the next required self-test - see "Time until next self-test" under "Functions without login > memory information". The self-test takes about 120 seconds.
HOST functions	Forgotten Admin PIN?	Unlocks the PIN for admin permissions. If the PUK is blocked, the Admin PIN cannot be recovered. The only way to recover then is to replace the TSE.
	Forgot User PIN?	Unlocks the PIN for user permissions. If the PUK is blocked, the User PIN cannot be recovered. The only way to recover then is to replace the TSE.

	Change PUK	Changes the PUK. Please keep the PUK in a safe place. If the User PIN or Admin PIN is locked, you will need the PUK to reset the Admin PIN and User PIN. If the PUK is blocked, you will need to purchase a new TSE.
Admin-Functions	All registered points of sale	Returns a list of sales points registered in the TSE.
	All registered points of sale	Returns a list of logged in (authenticated) points of sale.
	Register this point of sale	Registers this point of sale for use in the TSE. The ID of this point of sale must be registered with the BSI. This is done by the accommodation provider. A total of 100 points of sale can be registered in the TSE. One ID is used from the printer. Only points of sale that are registered in the TSE (German Fiscal Element) can be used for writing data to the TSE (transactions). Only the following characters are allowed: A-Z, a-z, 0-9, '()+,-./:=? All names containing the word "EPSON" are reserved and cannot be used. If you select to store this point of sale ID in the Lodgit Desk database, then it will be used when sending transaction data to the TSE.
	Change Admin PIN	Changes the Admin PIN. Please keep the Admin PIN in a safe place.
	Register printer to the TSE	Must be executed whenever the combination of TSE and printer has changed. Internally registers the serial number of the printer as a user in the TSE.
	Security key of the TSE	TSE: Registers the new security key on the TSE. The old security key of the TSE is overwritten. The security key is required for authentication with the TSE and thus for all user, admin and host functions. This includes the functions available in this window as well as the saving of transactions (invoice data and document data) on the TSE. Database: Do you want to store the security key in this database or do you always want to enter it together with the PIN?

		Please always keep the security key, regardless of whether you store it in this Lodgit Desk database, additionally in a safe place. Without the correct security key, communication with the TSE is impossible. The use of an incorrect security key can lead to permanent blocking of the TSE. In the event of permanent blocking, the TSE must be replaced.
	TSE Unlock	Sets the status of the TSE to "Unlocked". If the TSE is locked, no data can be written to the TSE (transactions), nor is it possible to export data. In the "Locked" status, only "Admin tasks" are possible on the TSE.
	Reset export status	This procedure clears the export status of the selected TSE.

<< Status Messages of the TSE <<

Expert Mode

>> TSE-Export >>

TSE Export

The data stored on the TSE should be backed up at regular intervals, as should the database. If the TSE is damaged, you can still access all necessary data in case of an audit by the tax office. The TSE export is available for this purpose.

You can access the TSE export via Administration > Additional modules > KassenSichV TSE. In the TSE administration window that opens, click on the **TSE export** button.
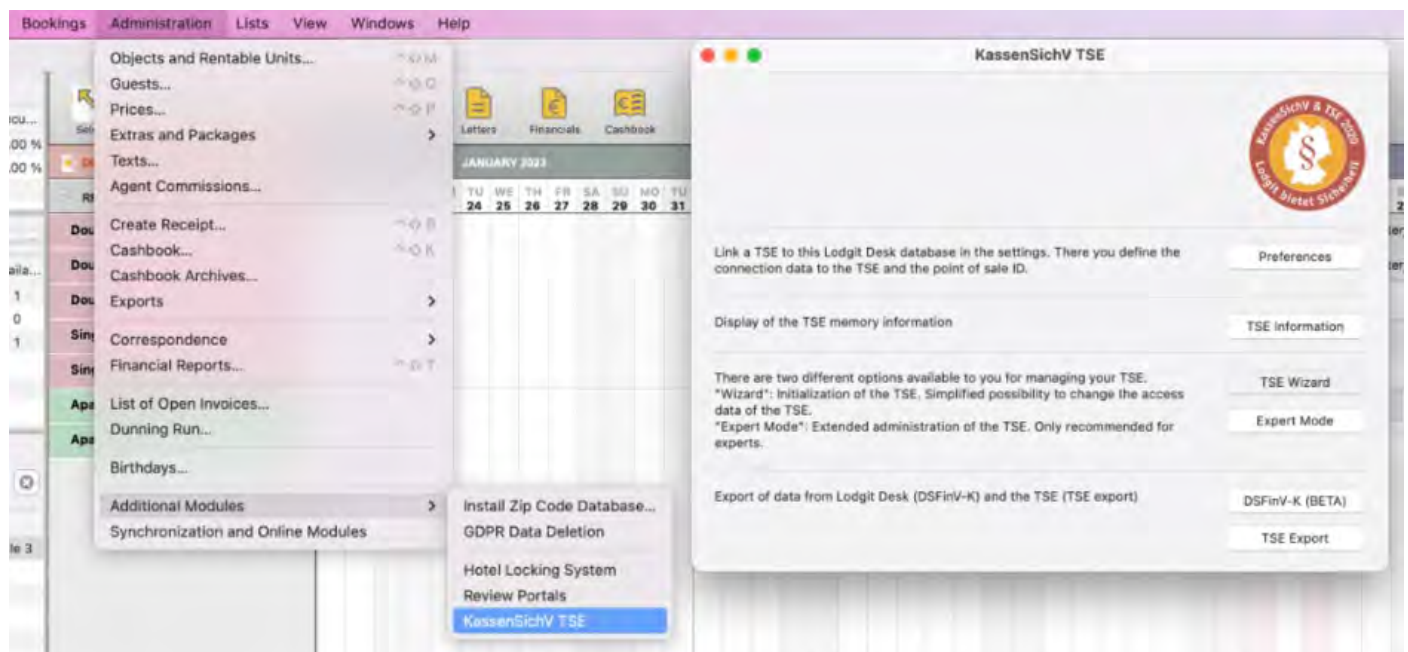
The export process can sometimes take a very long time. Therefore, it is recommended to perform the TSE export in a time period in which you do not have to work with Lodgit Desk, since no access to the software is allowed during the time of the export.

DSFinV-K-Export

Lodgit Desk has the option of data export in the DSFin-VK standard for tax authorities.

If required, you can call it up via Administration> Additional Modules > KassenSichV TSE > Exports> DSFin-VK Export.
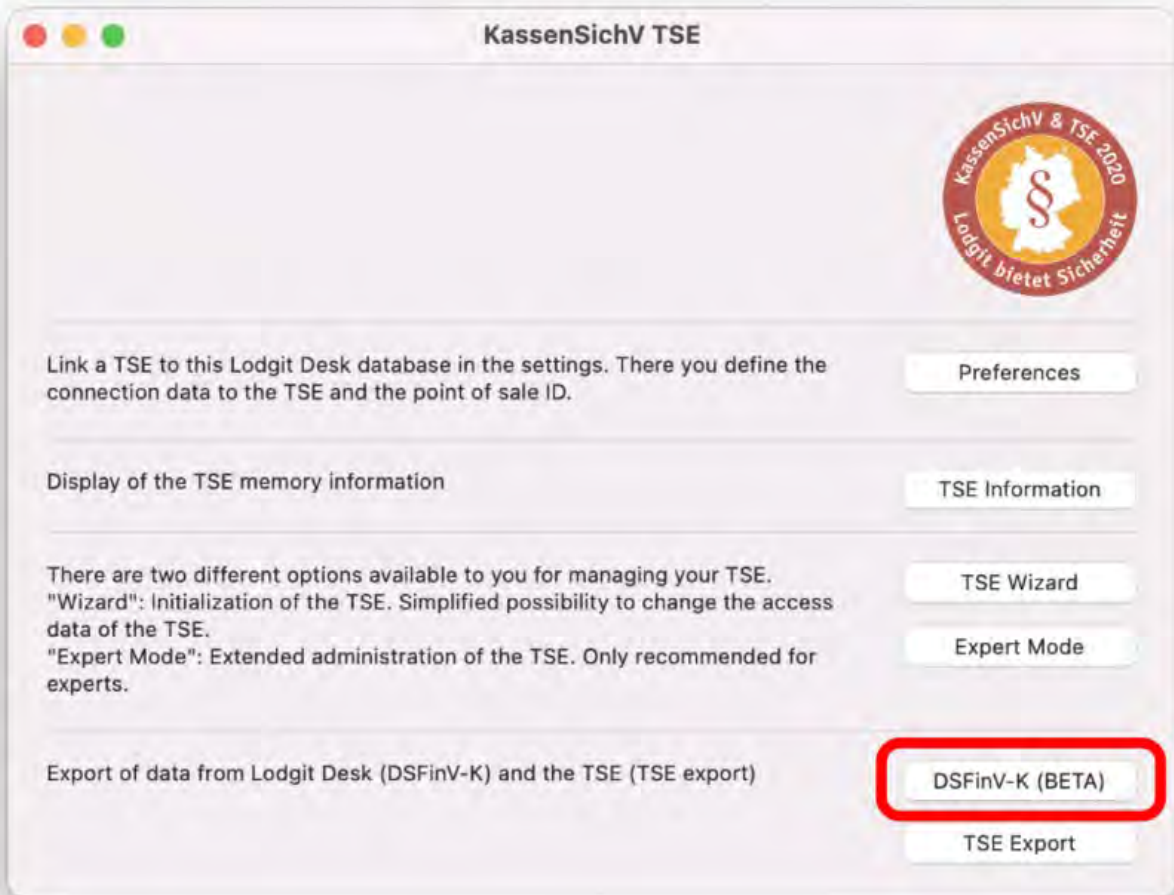
Here you specify the period for which the data is to be exported and a storage location for the export data.

The export process can take a long time, depending on the number of data records to be exported. It is best to do this at a time when you are not working with Lodgit Desk.

<< Expert Mode << TSE-Export >> FAQs about Cash Security Regulation & TSE >>

FAQs about Cash Security Regulation & TSE

Moving the TSE to a new computer
The certificate of my TSE has expired - What do I do now?
Performing firmware updates for the Epson TSE receipt printer TM-m30F
Connection to local IP address not possible
How do I get to the TSE Wizard again?
Unlock and change PINs and PUK
Status message "Not Authorised"

TSE USB Stick

1. First download Lodgit Desk on the new computer and then the driver for the TSE USB stick.
2. Remove the TSE USB stick from the old computer and connect it to the new computer.
3. Then go to the settings > KassenSichV TSE and deactivate the interface.
   Deactivating the interface unlocks the "Security key" field. Please enter the original security key "EPSONKEY" there and then click on "Activate".
4. After that you can go to Administration > Additional modules > KassenSichV TSE and open the expert mode there.
   There, go to the admin functions and below that to "Security key of the TSE". There you can now re-enter your own security key that you had assigned yourself during initialisation.
5. Confirm the process by clicking the "Run" button. Your TSE is now ready for use again.

<< FAQs about Cash Security Regulation & TSE <<

Moving the TSE to a new computer

>> Performing firmware updates for the Epson TSE receipt printer TM-m30F >>

The certificate of my TSE has expired - What to do?

If you can no longer fiscalize invoices as usual and the following message appears in Lodgit Desk settings under "KassenSichV/TSE" when activating your TSE interface, the certificate of your TSE has expired:

> TSE device is not reachable. (0/TSE1_ERROR_CERTIFICATE_EXPIRED - The certificate has expired).

TSE products are generally only certified for a specific term (3 or 5 years or 20 million signatures). After expiration, you need a new TSE module to continue fiscalizing your invoices. We offer three options with the TSE products from EPSON:

1. TSE printer > insert new SD card (Windows, Apple)
2. TSE-USB-Stick > connect new USB stick (Windows only)
3. TSE server > insert new TSE USB stick (Windows, Apple)

> **Attention**: **Please be sure to keep the expired TSE modul**e (USB stick or MicroSD) in a safe place. This module **contains all the important information** (especially all fiscalized invoices) that the tax office would like to see during an audit.

Change MicroSD card

1. Order a new Epson microSD card from our Website. Unpack the SD card when you receive it and have it ready.

2. In Lodgit Desk, navigate to Settings > KassenSichV TSE and click the "Turn off" button.

3. Turn off the Epson printer and remove the expired MicroSD card from the slot. This is located on the back of the printer in the lower area. Press the card briefly and it will be ejected by a spring. Store the expired SD card in a safe place.

4. Slide the new SD card into the slot until it clicks into place. Switch the printer on again.

> **Important Notice**: **Lodgit Desk version 3.0.4 or higher is required** for later initialization of your replacement TSE. If necessary, please carry out an update.

Deactivation of the interface

Please deactivate the TSE interface before activating your new TSE. In Lodgit Desk, navigate to **Settings > KassenSichV TSE**. In the window at the bottom right, click **Turn Off**. After initializing the TSE, you will be automatically redirected back to this window and can turn the interface back on.

Initialization of the TSE and activation of the interface

The TSE is delivered to you uninitialized. As soon as you have connected the TSE to your computer and it is set to ready for operation, you can start the initialization in Lodgit Desk. The TSE wizard of Lodgit Desk will help you with this. In the wizard, all data necessary for the operation of the TSE are defined during the initialization.

> **Notice**: When entering the passwords, please make sure that you **enter exactly** the specified number of characters (5-, 6-, 8-digit), otherwise problems with the TSE will inevitably occur during operation.

User PIN (5 digits); can be composed of letters (a-z, A-Z) and/or of numbers (0-9), no special characters	this is requested during the use of the TSE for identification purposes - is defined by yourself
Admin PIN (5 digits); can be composed of letters (a-z, A-Z) and/or of numbers (0-9), no special characters	for all administrative operations like TSE export or changes to the TSE - is defined by yourself
PUK (6 digits)	to unlock PINs: set by yourself
Security key (8 digits)	is needed for authentication - is set by yourself
Point of sale ID (max. 30 digits)	generated by Lodgit in the setup wizard and represents your Lodgit Desk database; required for regulatory registration of the TSE - generated by Lodgit for you during the initialization process in the wizard

> **Notice**: In addition, please keep this data outside Lodgit Desk in a safe place (e.g. password manager). If you have forgotten one of the PINs, you can reset it by entering the PUK. However, if you have neither PIN nor PUK, you can no longer make any changes to the TSE and the device must be replaced.

When you open Lodgit Desk for the first time after commissioning the TSE, a window opens informing you that the use of a certified safety device (TSE) is mandatory for objects in Germany.
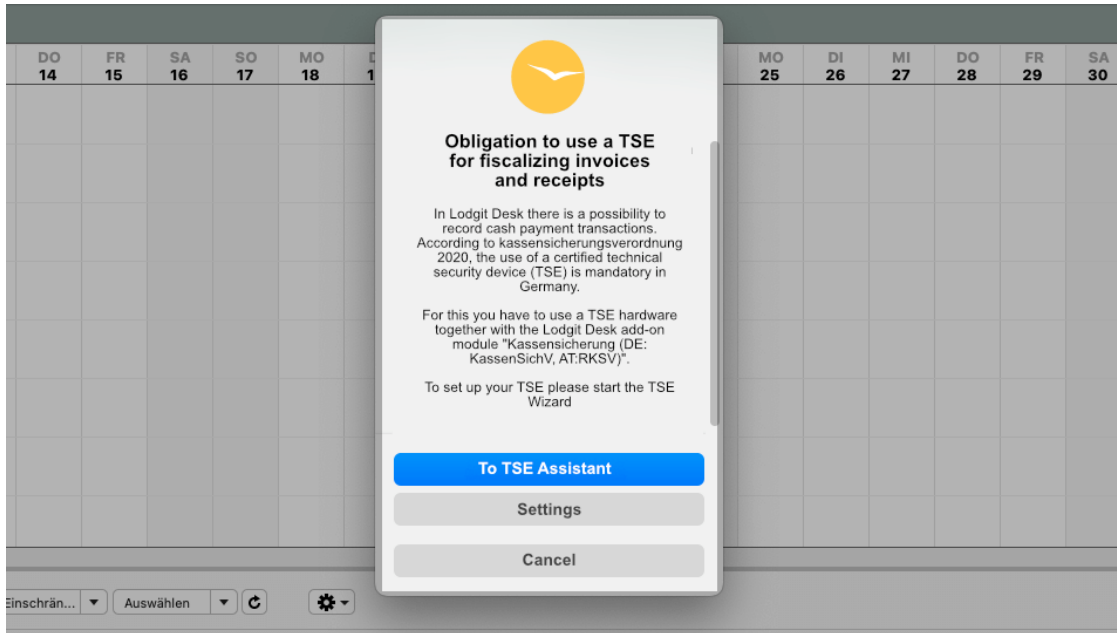
You now have the option to start the TSE wizard or to cancel the process. If you intend to cancel the process, please note that since 1.1.2020 it is a legal requirement to use a TSE with any software that can process cash payments.

> If this window does not open automatically, please navigate in Lodgit Desk to Administration > Additional modules > KassenSichV TSE. In this new window, please select TSE Assistant.
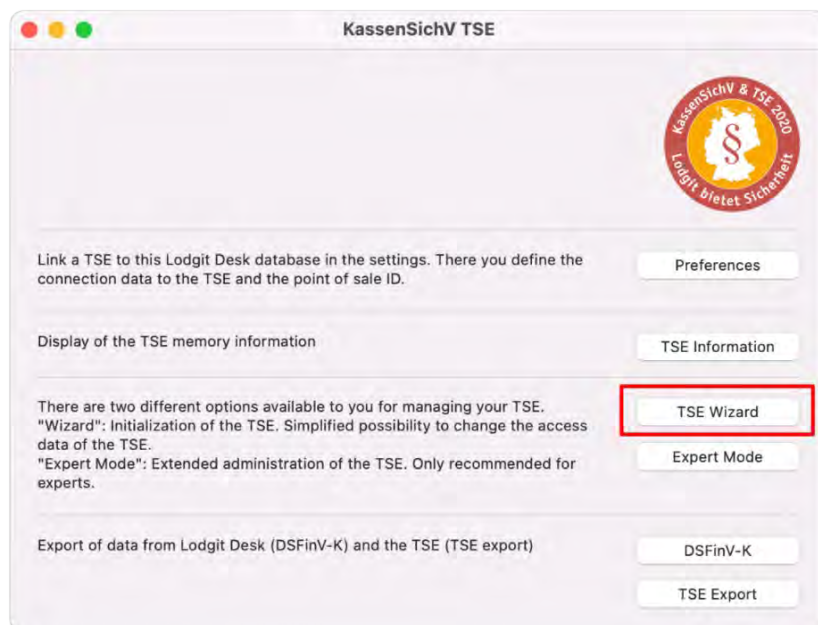
Initialization of an uninitialized TSE with the TSE Wizard

1. Select TSE: Enter the IP address of your TSE here and select the type of your TSE from the drop-down menu on the right. Then click on the button **"Search for available TSE devices"** to select the existing TSE. Then select the appropriate TSE from the drop-down list. If you use a receipt printer or a USB stick as TSE, the

device ID is always "local_TSE". If you are using a TSE server, after clicking the **"Search for available TSE devices"** button, you will be shown the TSE IDs available on the server. Please select the correct one from them.
Then click on **"Connect"**. A check of the data will now take place. If this is successful, you will be taken to point 2.
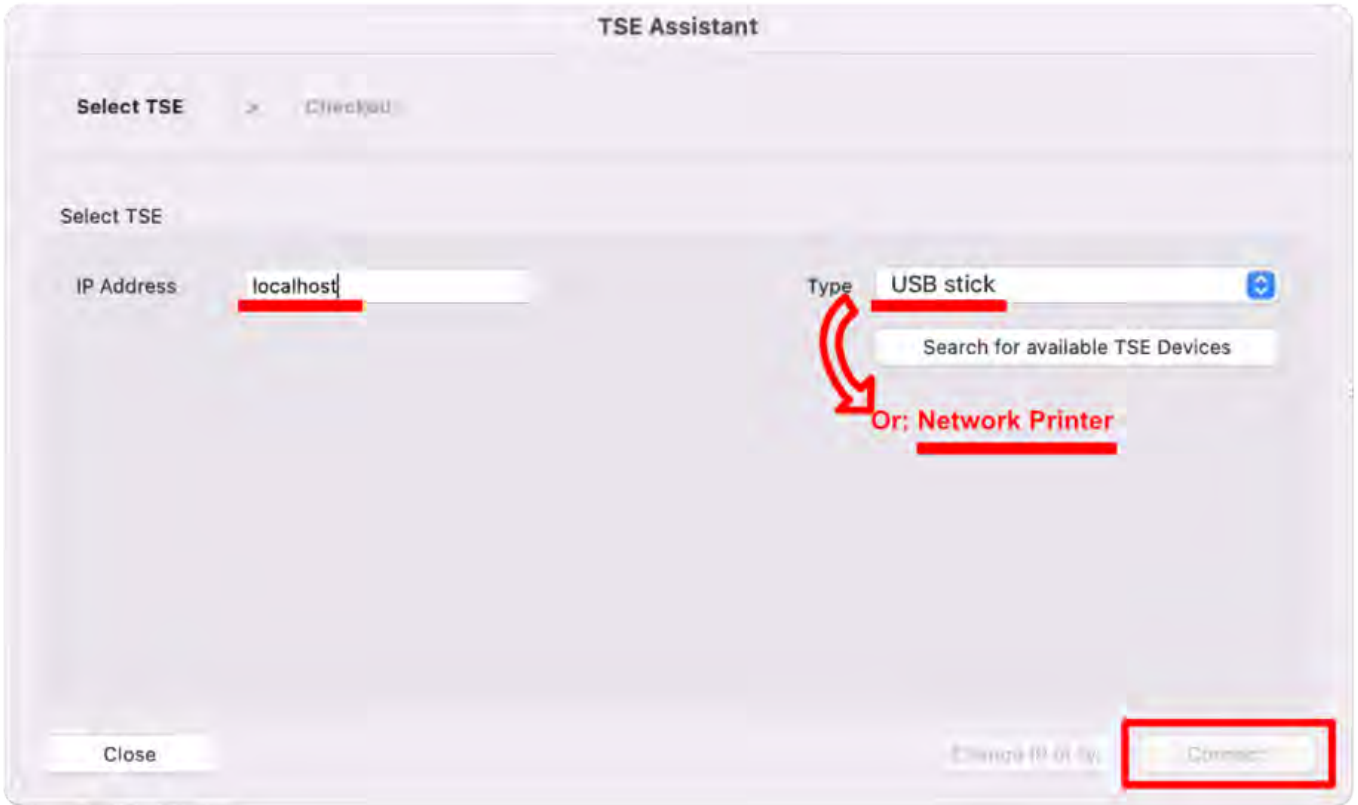
2. PIN, PUK: Here you assign the User PIN, the Admin PIN and the PUK. Then click on **"Next".**

3. Security key: Please enter here first the security key you have assigned during the initial installation.

> **Attention**: **EPSONKEY** automatically appears as the default security key in the "Security key (Alt)" field. **If you have not used** EPSONKEY as security key so far, please enter your individual previous code.

Enter a new security key in the second field. If you want, you can reuse the previous security key. This field must be filled with exactly 8 characters.

Finally, click on **"Next"**.

4. Point of sale: Here the point of sale ID is generated automatically by Lodgit. To do this, click on the **"Generate"** button.

5. Once the point of sale ID has been generated and is displayed, click the **"Execute initialization"** button.
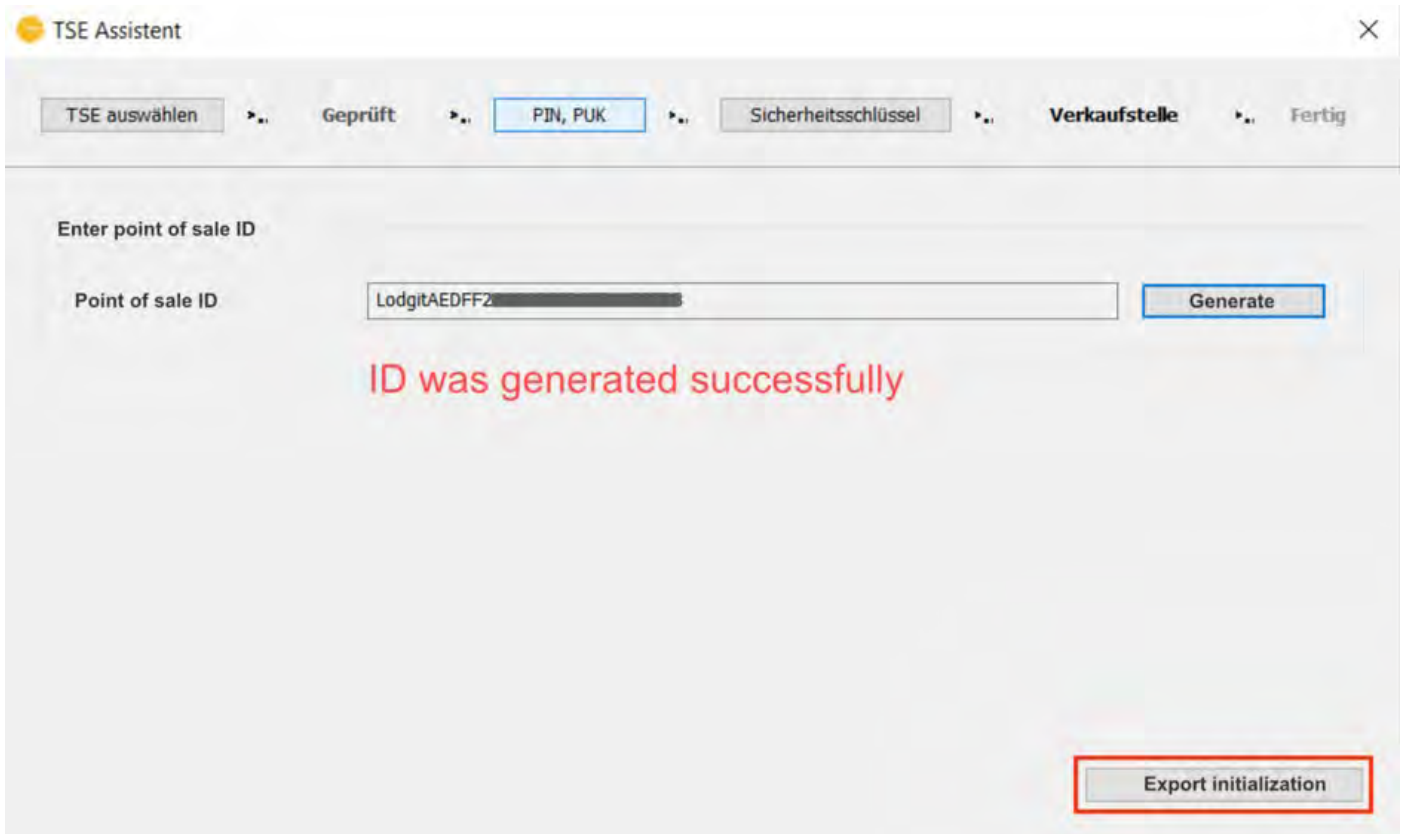
Important Notice: The initialization of the TSE is performed. This process may take a few minutes. Please do not turn off Lodgit Desk or the TSE during this time. Do not put the computer into sleep mode.

After that, a message appears that your TSE has been successfully initialized.
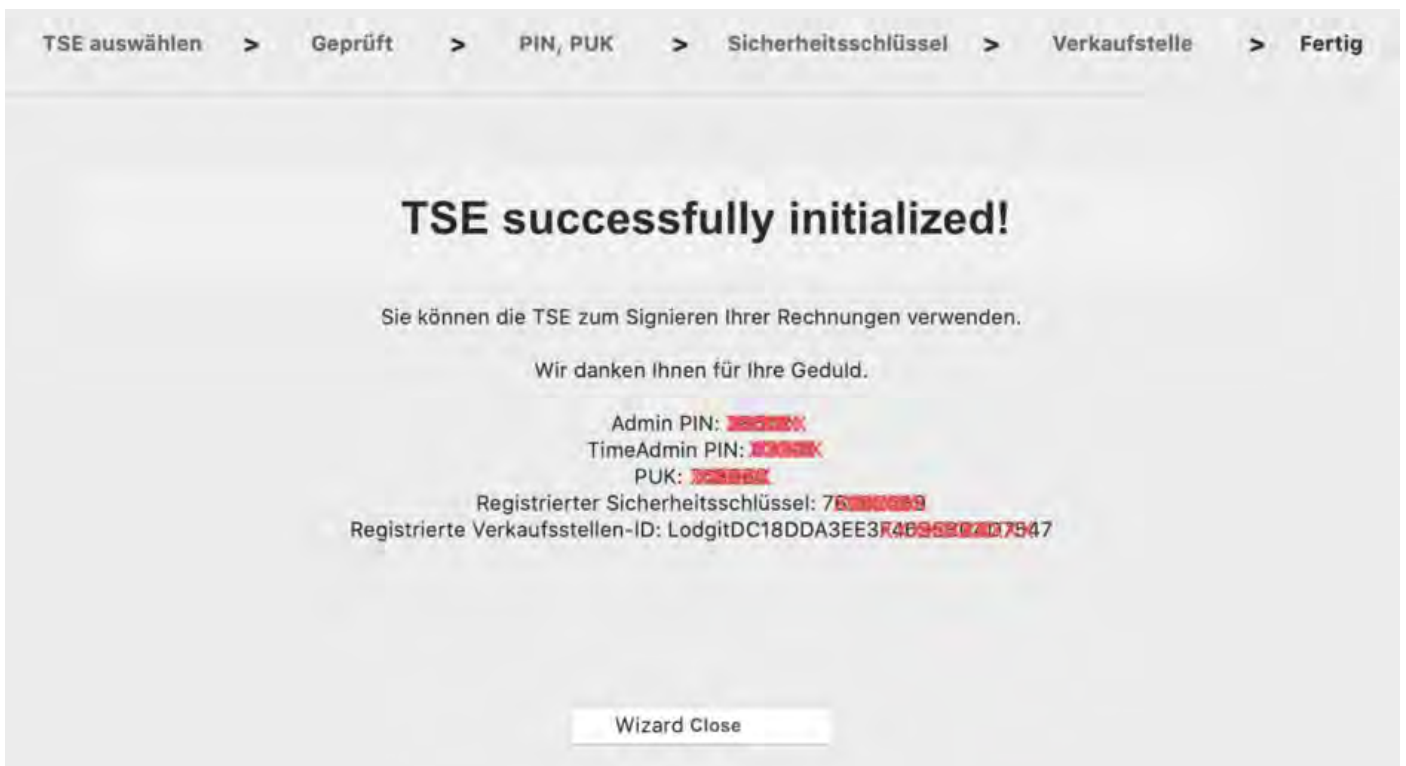
Please make a careful note of the **User PIN, Admin PIN, PUK, Security Key and Point of Sale data** displayed in this window, as you will need them to work with the TSE. You need the point of sale ID to register your TSE with the authorities.

The data entered in the wizard is automatically transferred to Settings > KassenSichV TSE, where you can complete the activation of the TSE. To get to the settings, click on the **"Close Wizard"** button.

In the settings, please check whether the pre-filled data match the data from the wizard that you should have noted down. If all the data is correct, click the **"Activate"** button. The data will be checked. If this is successful, the login window will open. Enter your previously assigned User PIN here.

After successful verification of the data, the interface is active and the **"Activate"** button changes to the **"Deactivate"** button.

From now on your invoices will be signed with the TSE.

Performing firmware updates for the Epson TSE receipt printer TM-m30F

Firmware updates for the Epson TSE TM-m30F receipt printer can be performed directly via the corresponding app (Epson "TM Utility") for the Android or iOS operating systems.

You can download the app appropriate for your operating system via the following links:

JETZT BEI Google Play   Download on the App Store

Windows users also have the option of downloading the firmware update directly from Epson's website. Unfortunately this option does not currently exist for macOS users.

A user name and password are requested for the update. The **user name** is **epson** and the **password** is the **serial number of the printer**.

This can be accessed by making a status printout. To do this, hold down the paper feed key on the receipt printer for a little longer. A **SERIAL No.** is displayed on the printed receipt, which you must enter as a password.

```
Printer Name
  TM-m30

Printer Firmware Version
  1.50A ESC/POS

  Main      : 1.50
  Network   : 02.04


  SERIAL No.
  X6WA004997


Interface
  Bluetooth
    BD_ADDR     : 00:01:90:72:15:49
    Passkey     : 0000
    Device Name: TM-m30_004997
    Module Ver : 1.02
    Module Info: BT401-0106E
    Mode        : Auto re-connect enable
    Security    : Low
```

To download the firmware update, please proceed as follows:

Step 1: First select the latest firmware update.

Step 2: Click on the **'Get'** button.
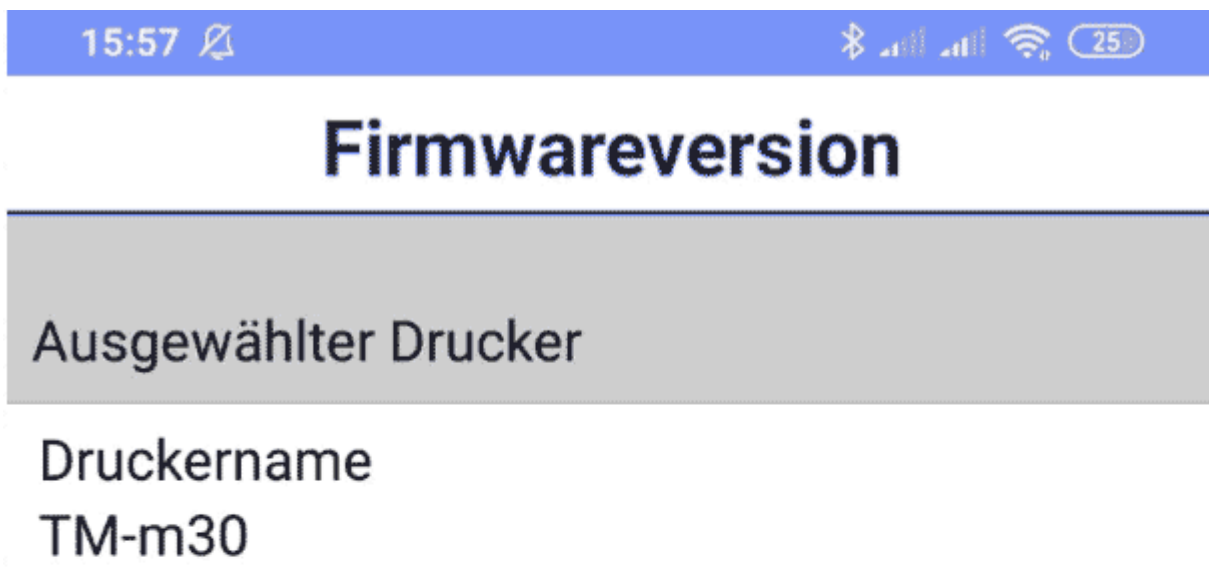
Firmwareversion
1.50A ESC/POS

Aktualisierbare-Firmware-Liste

ERHALTEN

✓ 1.50A ESC/POS (Heruntergeladen)

1.49A ESC/POS

1.48A ESC/POS

1.46A ESC/POS

1.43 ESC/POS

1.42 ESC/POS

1.41 ESC/POS

1.31 ESC/POS

1.30 ESC/POS

WEITER

Step 3: Do not select a WLAN dongle unless there is a WLAN dongle built into the printer, in which case, select the correct version.
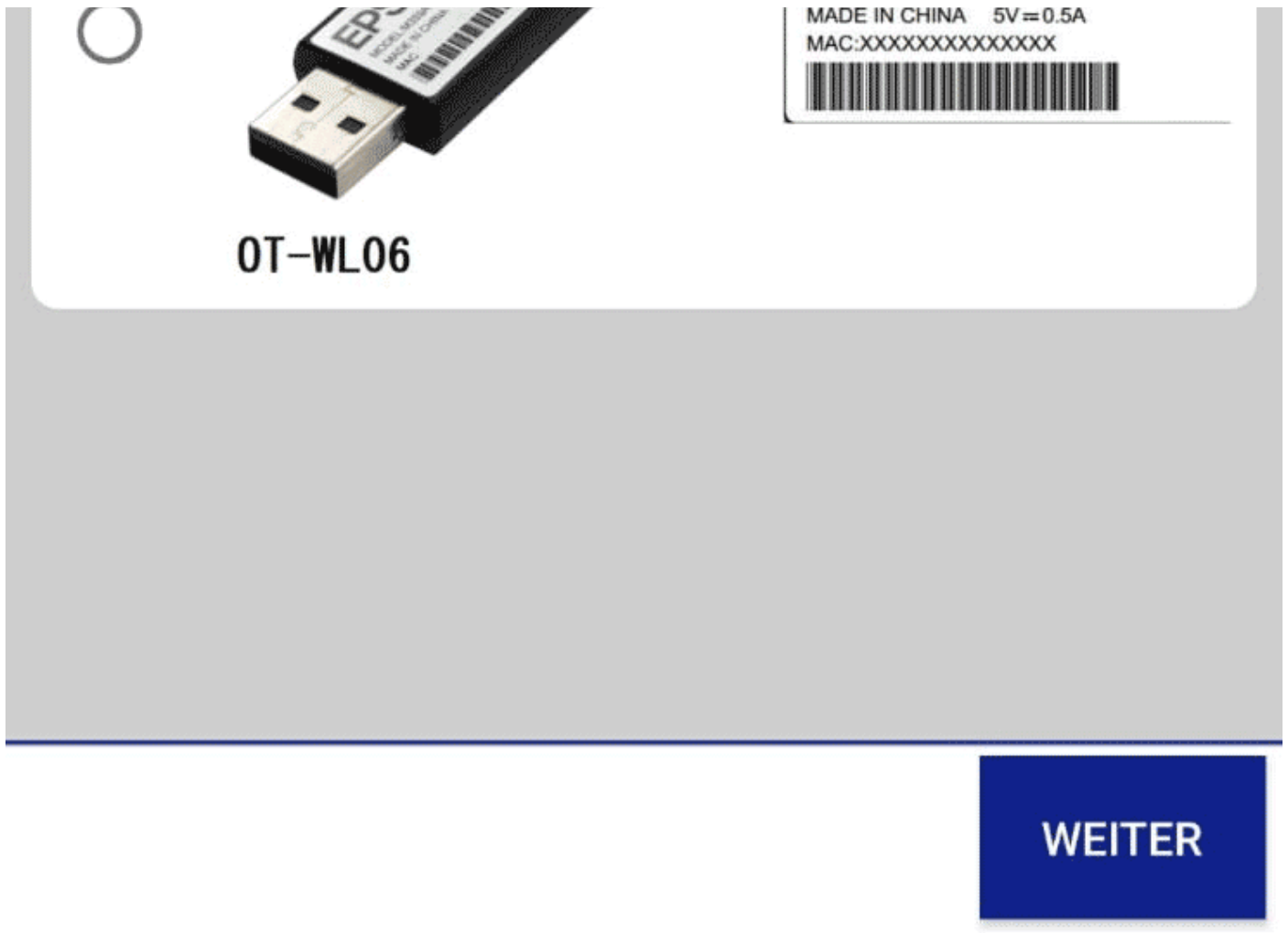
After that, click **Next**. The new firmware in the app should then be available.

<< Moving the TSE to a new computer <<

Performing firmware updates for the Epson TSE receipt printer TM-m30F

>> Connection to local IP address not possible >>

Connection to local IP address not possible

If you use a firewall on your computer system, it's possible that the local IP address is no longer available. As a result, it will not be possible to establish a connection to the TSE.

Solution: The firewall must be switched off completely or a setting in the firewall must be found under which this problem cannot occur.

Apple MacOS guide to firewall settings

Microsoft Windows guide to firewall settings

If this doesn't solve your problem or you use a different firewall, please contact the support team of your firewall provider or consult the documentation of your virus scanner.

Info: Find out the IP address of your TSE

Taken from the putting the TSE into operation article:

Epson always accesses the TSE via a network interface. Therefore, it is necessary to find out the IP address of your TSE.

- For a USB TSE, the IP address is localhost. If this does not work, enter the IP address 127.0.0.1.
- To find the IP address of the network TSE (receipt printer or server), first make sure that your machine is properly connected to your network.
  - Usually a router assigns an IP address to your TSE hardware. Check within your router configuration which hardware is present in the network. With most routers, you can display in the administration interface which devices are currently connected to which IP.
  - The Epson receipt printers print out their IP address received via DHCP at start-up.
  - Epson's published **app** for Android or iOS can help you discover Epson devices (and their IP address) on your network.

If possible, assign a fixed IP to your TSE in the router.

<< Performing firmware updates for the Epson TSE receipt printer TM-m30F <<

Connection to local IP address not possible

>> How do I get back to the TSE wizard >>

Returning to the TSE wizard if you closed the message at the beginning

To access the TSE Setup Wizard, please follow the steps below:

- In Lodgit Desk, go to Administration > Additional modules > KassenSichV TSE in the menu bar at the top.

- In the window that opens, click the **TSE Wizard button.**

If you have not yet set up the TSE, you can also click directly on the grey TSE button in the upper menu bar. A window will then open which will take you directly to the TSE wizard.
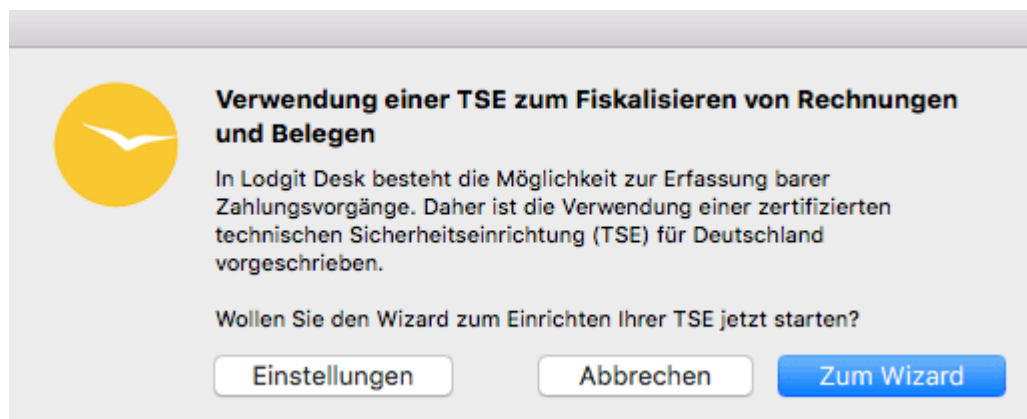
Verwendung einer TSE zum Fiskalisieren von Rechnungen und Belegen

In Lodgit Desk besteht die Möglichkeit zur Erfassung barer Zahlungsvorgänge. Daher ist die Verwendung einer zertifizierten technischen Sicherheitseinrichtung (TSE) für Deutschland vorgeschrieben.

Wollen Sie den Wizard zum Einrichten Ihrer TSE jetzt starten?

[Einstellungen]   [Abbrechen]   [**Zum Wizard**]

<< Connection to local IP address not possible <<

How do I get to the TSE Wizard again?

>> Unlock and change PINs and PUK >>

Unlock and change PINs and PUK

Please note: After entering the PUK incorrectly 3 times, it will be locked and cannot be restored. The PUK can be blocked if you enter the PUK incorrectly 3 times when changing the PIN. The TSE is then no longer operable and a new one must be purchased.

I would like to change my Admin PIN

To change the Admin PIN, please proceed as follows:

- Go to **Administration > Additional modules > KassenSichV TSE** and open the **expert mode**.

- Click the **Connect** button.

- Go to **Admin Functions** in the **Administration** tab and select **Change Admin PIN**.

- First enter your old Admin PIN and then the desired new Admin PIN.

- Confirm the operation by clicking the **Apply** button.

I would like to change my PUK or have forgotten it

To change the PUK, please proceed as follows:

- Go to **Administration > Additional modules > KassenSichV TSE** and open the **expert mode**.

- Click the **Connect** button.

- Go to the **Unlock PIN** function in the **Administration** tab and select the **Change PUK** function.

- First enter your old PUK and then the desired new PUK.

- Confirm the operation by clicking the **Apply** button.

I have forgotten my Admin PIN or locked it by entering it incorrectly 3 times

To unlock your Admin PIN, please proceed as follows:

- Go to **Administration > Additional modules > KassenSichV TSE** and open the **expert mode**.

- Click the **Connect** button.

- Go to the **Unlock PIN** function under the **Administration** tab and select **Forgot Admin PIN**?

- First enter your TSE PUK and then the desired new Admin PIN.

- Confirm the operation by clicking the **Apply** button.

I have forgotten my user PIN or locked it by entering it incorrectly 3 times

To unlock your User PIN, please proceed as follows:

- Go to **Administration > Additional modules > KassenSichV TSE** and open the **expert mode**.

- Click the **Connect** button.

- Go to the **Unlock PIN** function under the **Administration** tab and select **Forgot User PIN**?

- First enter your TSE PUK and then the desired new User PIN.

- Confirm the operation by clicking the **Apply** button.

<< How do I get to the TSE Wizard again? <<

Unlock and change PINs and PUK

>> Status message "Not Authorised" >>

Status message: "Not authorised"

The status message of the TSE **"Not authorised"** can be caused if programs which access the TSE (e.g. a cash register or an antivirus program) are not terminated properly before you put your computer or your laptop into sleep mode. In the case of a laptop, for example, this happens if you just close it and don't shut it down properly. As the name might suggest, this error message has nothing to do with missing or wrong login data, but this is an internal error of Epson.

If you are using a Windows computer, you should make sure that the "Quick Start" function is not activated in the system settings. If this is the case, you should disable it urgently.

In the following screenshot you can see where to find this function in your system settings. The check mark at "Enable quick start" must be unticked.

If the error message **"Not authorised"** occurs, the TSE is no longer fully functional.

The following operations are then no longer possible with the TSE:

- - Changes to a booking are not signed
- - Invoice data is not signed
- - Document data is not signed
- - all functions in expert mode, for which you have to log in (except "functions without login")

The error becomes apparent the first time that data has to be written to the TSE or when you want to read data from the TSE memory (e.g. all admin functions). It's still possible to retrieve the TSE information under Settings in Lodgit Desk if there is no error message after switching the TSE on/off.

To fix the problem, proceed as follows:

- **TSE self-test**

  1. Go to the expert mode in Lodgit Desk under Administration > Additional modules > KassenSichV TSE.

  2. Unlock the functions in the expert mode by clicking the "Use" button.

  3. Click on "Functions without login" and select the "Perform TSE self-test" function in the drop-down menu.

  If this is not successful, please proceed as described in the next step;

- **Quit Lodgit Desk and restart computer**

  If this is also unsuccessful, restart your TSE.

Restarting the TSE

1. **USB-Stick:**
- Eject the USB stick properly and then insert it again. Wait until the USB stick stops flashing. Only then is it ready for operation again.

2. **Receipt printer:**
- Turn off the receipt printer using the on/off switch and wait until it stops blinking and shuts down completely.
- Then switch the receipt printer on again and wait until it has started up completely. An automatic receipt printout should take place. After about 20 seconds, the TSE is ready for use again.

3. **TSE-Server:**
- Log in to the web interface of your server.
- In it, go to the "Administration" menu item and click "Restart".

If you have restarted your TSE, you can perform the operation again by clicking on "Repeat" in the TSE transaction window. Please note that this is only possible when the TSE is restarted. When you exit Lodgit Desk, the window will close automatically. And to be able to run the self-test, you need to close the TSE transaction window first. In both cases, the transaction will not be repeated afterwards.

<< Unlock and change PINs and PUK <<

Status message "Not Authorised"

>> Kassa Austria RKSV (AT, cbird) >>

Kassa Austria RKSV Interface

The interface "Kassa Austria RKSV" enables the automatic recording of sales generated on site with the help of the software cash register cbird. With this interface, Lodgit Desk fulfils the requirements of the Austrian Cash Register Security Ordinance (RKSV). Thus, this interface is required by all Lodgit users in Austria, if they have cash turnovers (including ATM, credit card and other on-site payments) of more than 7500 EUR per year and want to account for these with Lodgit Desk.

The new law requires an external backup of the POS data on a second storage medium every three months. Cbird meets these requirements automatically. The data is saved on the stick and simultaneously on the hard disk of your computer or laptop every time a change is made.

Cbird is a cash register software on a USB stick. Via the interface, Lodgit Desk sends all invoice and cancellation data to the USB-stick. There, these are then additionally accounted and properly archived.

Setup

First of all, you need to create an export folder for the cbird cash register on your system. This basically has the path:

USERHOME / cbirdWatch / KASSENNUMMER

For example, using a Mac:

Or with Windows:
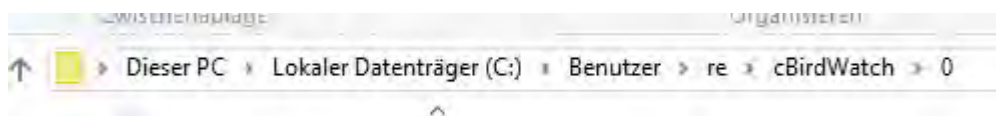
The KASSENNUMMER is a worldwide unique number, which you can find on the packaging or in the documentation of your cbird stick (the 0 shown in the examples is the number of the demo cashier).

Lodgit Desk can create this folder for you automatically. To do this, go to the general program settings (Edit > settings under Windows or Lodgit Desk > settings under Mac) to the item "Kassa Austria RKSV" and to "Storage location".

cbird.at – Die Registrierkasse auf USB–Stick

☑ Schnittstelle aktiv

Übertragung | **Speicherort** | Zahlungsarten

⦿ Pfad automatisch ermitteln   ○ Manuelle Eingabe

Pfad zum cbird@–Import–Verzeichnis automatisch, mithilfe der cbird@–Kassennummer, ermitteln lassen.

cbird@–Kassennummer: 523632   Pfad erneut ermitteln

Ermittelter Pfad: /Users/re/cbirdWatch/523632

Textkodierung

UTF–8

Achten Sie darauf dass das Programm cbird@ gestartet ist und das "automatische Bonieren" in cbird@ aktiviert ist.
Dies kann im Menüpunkt des Programmes cbird unter "Kassa > Automatisches Bonieren" ggf. wieder eingeschaltet werden.

Enter your cash register number here and click on "Determine path again".

Then start cbird and set up the program according to the cbird instructions. You can also find these instructions directly online at the cbird website.

If, for example, umlauts (eg ö) are displayed incorrectly in cBird, you have probably selected an incorrect text encoding. Lodgit then passes characters to cBird that it does not understand or interprets incorrectly. Please try which encoding fits. For Windows, the correct encoding should be either ISO-8859-1 or Windows-1252. Which one depends on the version of Windows you are using.

If you use Lodgit Desk in **database server mode** (i.e. from multiple computers simultaneously):

- Create the export folder on the computer where the cbird stick is connected (for example, the computer where the cubeSQL server is also running)
- Share this folder on the network with all other computers
- And in the Lodgit settings of the other computers, select this network shared folder as the location for the cbird interface

Settings

Afterwards you can activate the interface in Lodgit Desk. To do so, go back to the general program settings and to the subitem "Kassa Austria RKSV" and check the box "Interface active".
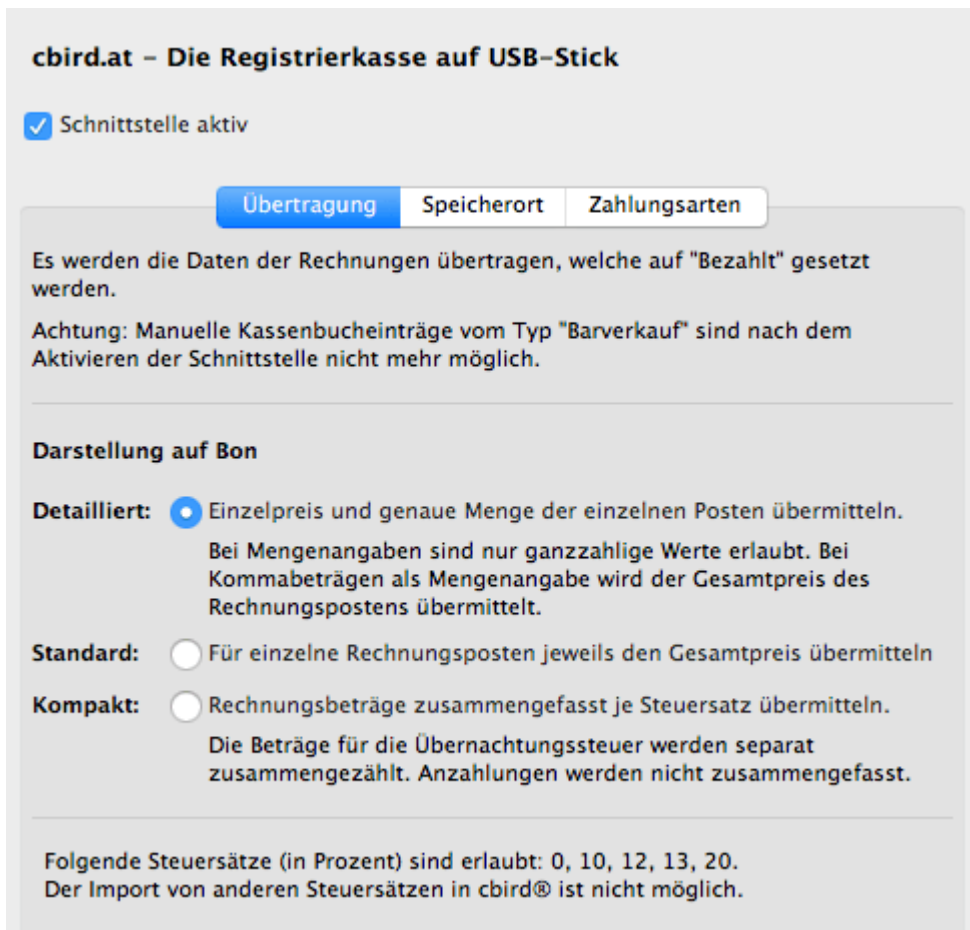
In the first step, you can now define how exactly services are to be transferred to the cash register. We recommend the default setting "Transmit the total price for each individual invoice item" ("Für einzelne Rechnungsposten jeweils den Gesamtpreis übermitteln").

Suppose you bill for the following services:

- 4 nights at 50€ with 10% VAT

- 2 Extra items A at 10€ with 20% VAT

- 1 Extra item B at 5€ with 20% VAT

With these recommended settings, these services will then appear on the cash register receipt as follows:

- Standard:

- 1 overnight service at 200€ with 10% VAT

- 1 extra item A for a total of 20€ with 20% VAT

- 1 extra item B for a total of 5€ with 20% VAT

Alternatively, you can use the following settings, which are transferred and appear as follows:

- Details

- The invoice items are transmitted with quantity information exactly as they appear on the invoice. So;

- 4 nights at 50€ with 10% VAT

- 2 Extra items A at 10€ with 20% VAT

- 1 Extra item B at 5€ with 20% VAT

- Compact

- 1 overnight service at 200€ with 10% VAT

- 1 Extra item 25€ with 20% VAT

In a final step, the payment methods created in Lodgit Desk must be linked to those of cBird under the **"Payment methods"** tab. By default, everything is already preset here. However, if you have created your own payment types in Lodgit Desk, you can also assign them to a cbird payment type (cash, ATM, credit card) in the table.

The interface is now ready for use. Now start the cbird software and (if not done so far) set it up completely.

If you now create an invoice in Lodgit Desk with one of the payment types assigned to cbird, it will be transferred to the cBird cash register when you set it to paid (or immediately in the case of cash payment). This processes the invoices further, saves them according to the specifications and immediately creates a receipt printout.

If invoices from the past are transferred to the cbird cash register, the "Re-billing" mode is automatically activated for them in cBird.

Future invoices (or invoices with a paid date in the future) cannot be transferred. It is also generally no longer possible to create or set to paid the invoice with assigned cbird payment type with activated Kassa Austria RKSV interface in Lodgit Desk.

<< Status message "Not Authorised" <<

Kassa Austria RKSV (AT, cbird)

Kassa Austria RKSV Interface

The interface "Kassa Austria RKSV" allows sending all invoice data created in Lodgit Desk to a cbird pendrive POS. This is necessary for Austrian customers accepting cash or credit/debit card payments on site (above 7500€ per year) in order to comply with the current Austrian financial laws (the RKSV act).

This law requires the transaction data to be saved on a second, external device at least every three months. cbird complies with this requirement: new and changed transaction/invoice data will be saved both on the pendrive as well as on the hard-drive of your computer.

Generally cbird is a POS software on a pendive. Lodgit Desk sends all invoice and invoice cancellation data to the stick which archives them and prints a receipt.

Setting up the interface

First of all you need to add the "Kassa Austria RKSV" interface to your existing Lodgit Desk license. You can simply purchase it the online shop on our website. Second you need the actual cbird pendrive which you can order on cbird.at

After purchasing the interface for Lodgit Desk you might need to update your license information. Click "File" (on Windows) / "Lodgit Desk" (on Mac) > "Software Activation..." > "Update License Info".

Now head to the general preference of Lodgit Desk by clicking "Edit" (Windows) / "Lodgit Desk" (Mac) > "Preferences...". You should now be able to see "Kassa Austria RKSV" in the list of settings on the left side. Click on it and then change to "Location"
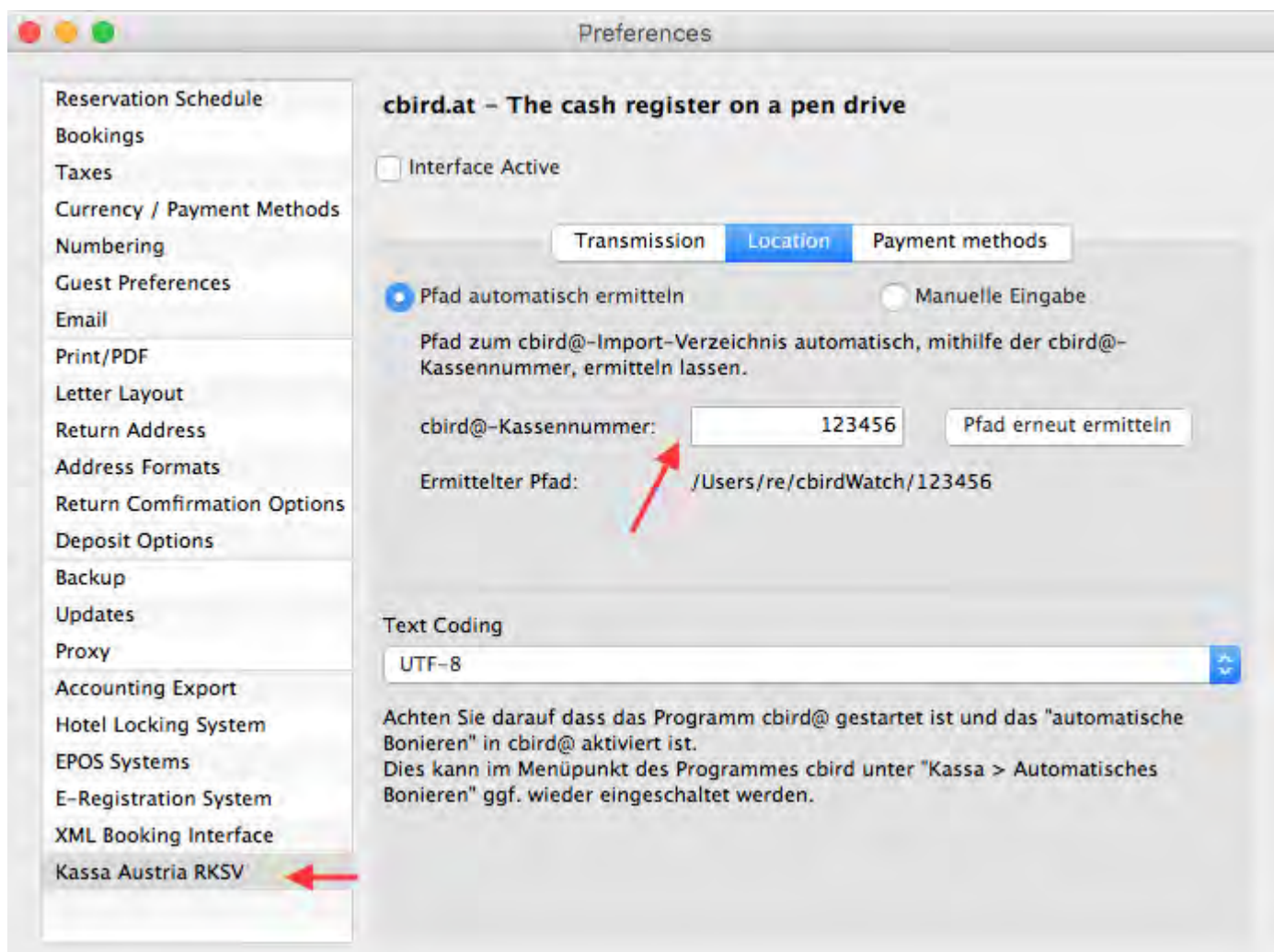
In this window you have to enter the unique number of your cbird pendrive (the "Kassennummer") and then click "Pfad erneut ermitteln". Afterwards tick the box for "Interface Active".

Now you can insert the cbird pendrive into your computer, start up the cbird software (so far unfortunately only available in German), configure it and make sure that "Automatisches Bonnieren" is activated in the cbird software.

When creating a new invoice in Lodgit Desk with a payment method that is considered by cbird, the invoice information (items, total, etc...) will automatically be exported and processed by the cbird software.

KASSA AUSTRIA RKSV (AT, CBIRD)   UP   GDPR DATA CLEANSING

GDPR Data Cleansing

With the GDPR data cleansing there is a possibility to delete data that does not necessarily have to remain stored in your Lodgit Desk database (e.g. for tax reasons).

Especially bank and credit card information from older channel manager- and online bookings can be deleted cleanly from your database.

> Before running this function, make sure that you have an up-to-date backup of your database!

Before deleting, you can specify the period, booking status, and object for which you want to delete the data.

> For many channel manager bookings, the credit card information was not transmitted as such but simply in the booking note, so it makes sense to delete the booking notes as well.

> Guests who are not linked to a booking can be found in the guest administration in the automatic group interested parties. You should delete these at regular intervals. Guests that are linked to bookings must be archived for tax reasons.

Kassa Austria For RKSV compliance   Up   Interface to Review Portals

Additional module: Review Portals

The additional module "Interface: Review Portals" allows you to automatically send guest information to a review portal so that they can remind the guest to leave a review about their stay at your accommodation.

The requirements for sending guest data to an evaluation manager

- The departure date of the booking is a maximum of 180 days in the past or a maximum of 180 days in the future
- The booking has the status "checked out"
- An email address is recorded with the guest
- The guest has given his/her consent to send the data to an evaluation manager (see below)
- No data has yet been sent to a valuation manager for this booking
- The data is only sent for one guest per booking. If an email address for the main guest is stored and this guest also has the "consent to send data to rating portals", then this guest will be used preferentially. If the main guest does not meet one of the two requirements or if he does not travel by himself ("is self guest" is set to "OFF"), the first found fellow traveller who meets the requirements will be used.

Permission of the guest

The guest has to agree to have their data sent to the review portals. This permission setting is done in the guest files:
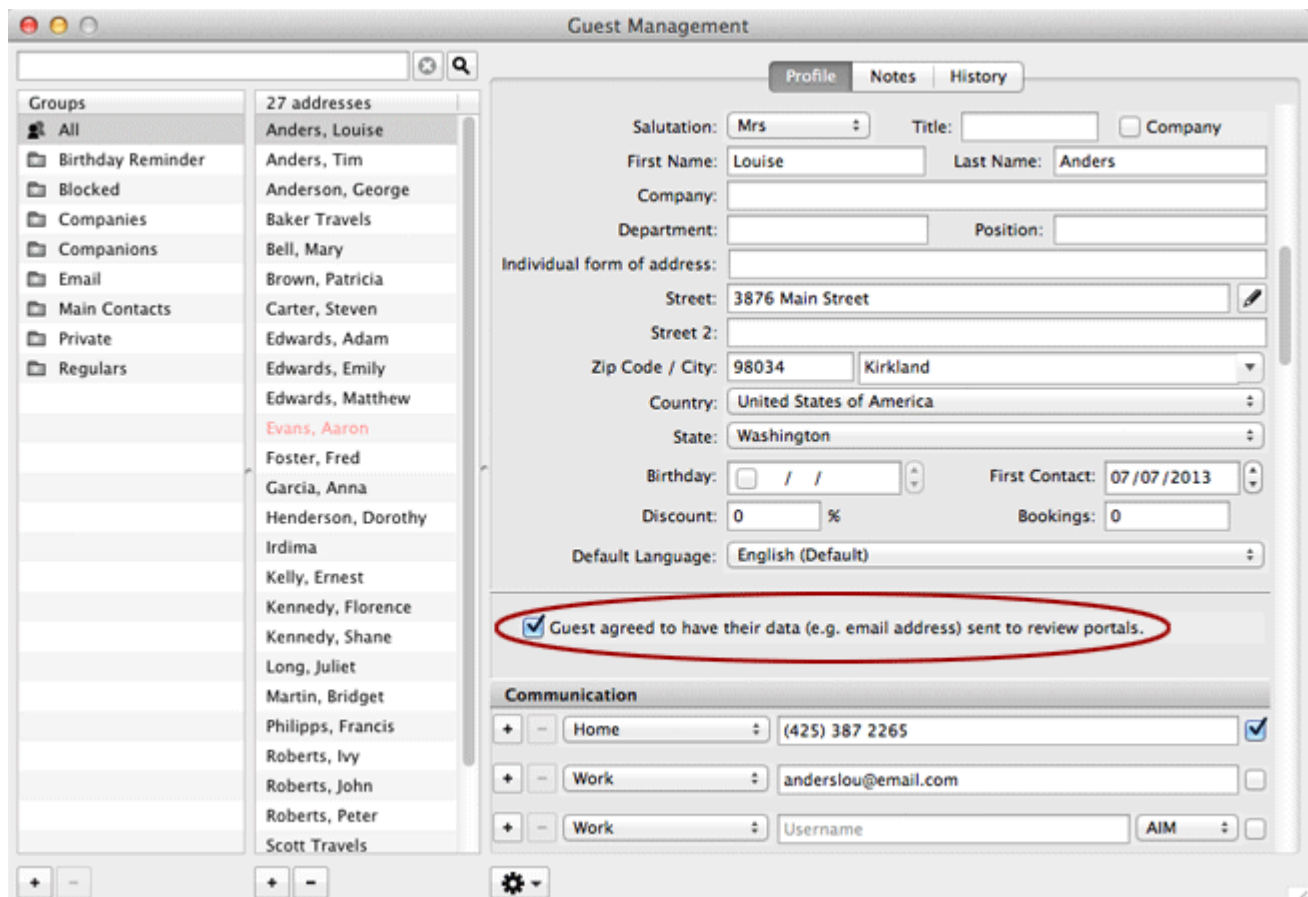
Booking data is only sent to a review portal if the following criteria are ALL met:

- At least one guest of the booking has given permission and listed an email address.
- The booking has the status "Checked Out".
- The booking's departure date is no less than 2 days in the past.

Settings for the Review Portals

Under **Administration > Additional Modules > Review Portals** you'll find the settings. You can select a different review portal for each object in Lodgit Desk.
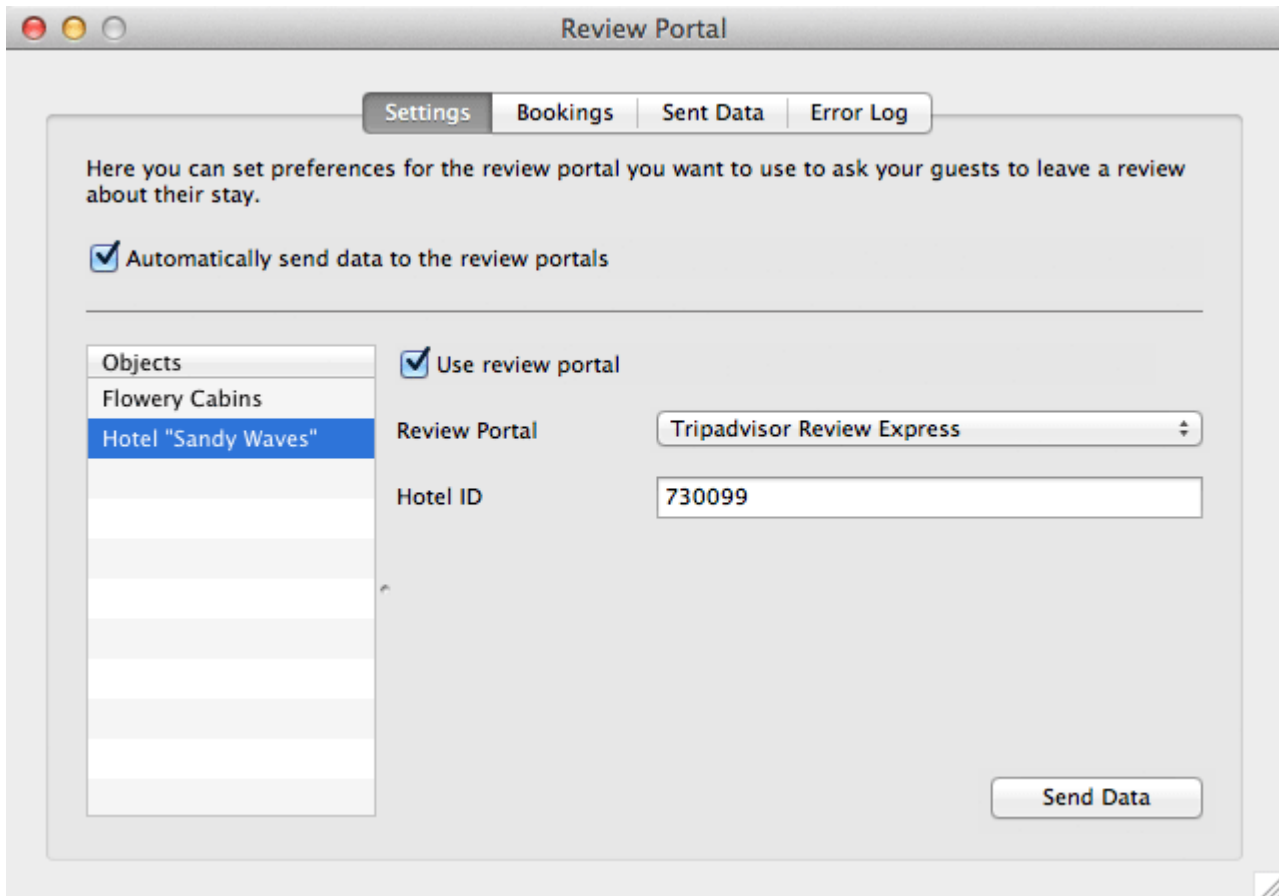
1. In the left list, select the object and check the box **Use review portal**.

2. Then, select the review portal from the list and enter the house ID that you are listed with on the portal with.

Then you can check the box **Automatically send data to the review portals**. Once a day, this will send all bookings in the status "Checked Out" whose departure date is in the future or within the last two days.

> *Important:*
> *The emails are supposed to be sent in a timely manner in regards to the stay. That's why the review portals only want to receive booking data for those bookings that have their departure date in a certain time frame (often only until the day before the send date). This means that some bookings may not be sent to the review portals if the status "Checked Out" is set too late.*

You can also send the data manually through the Actions menu.

Bookings
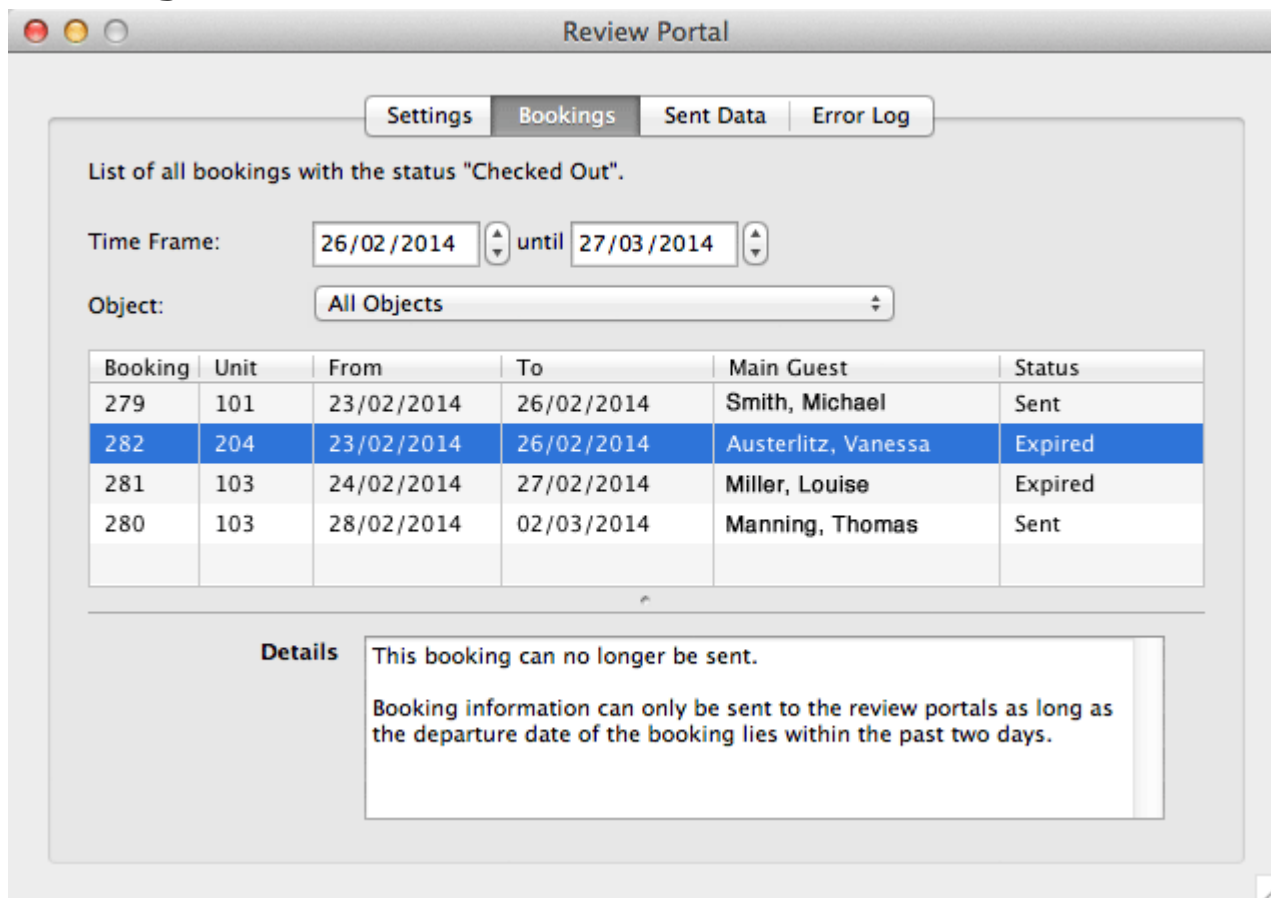
This will list all the bookings with the status "Checked Out" that are in the specified time frame.

Expired bookings are too old to be sent to a review portal.

Sent bookings have already been sent to a review portal. Select the list entry and the "Details" window will list the data that was sent.

Open bookings have the status "Checked Out" and a departure date that theoretically allows for them to be sent to a review portal. It is still possible that none of the guests have email addresses listed or agreed to have their data sent to a review portal and so the booking cannot be sent! Select the list entry and look at the "Details" to see if the booking will be sent or not.

Sent data

All data that was sent will be listed here.

Error Log

If there are any issues with sending the data, they will be listed in this log.

GDPR Data Cleansing   Up   Zip Code Database

Zip Code Database

If you want to use more countries or states than are listed in Lodgit Desk by default, you have the option to download the zip code database from GeoNames.org and integrate it into Lodgit Desk. This will automatically add all states to a country. Also, when entering a zip code and country, this database will automatically suggest a city that corresponds to this zip code.

To download this database go to **Administration > Additional Modules > Install Zip Code Database...**

In the new window, press **Install**. After the download and installation, the database will be available to you right away.

Definitions

Accommodation types
Categories for rentable units
Price units in Lodgit Desk
Booking statuses in Lodgit Desk

Definition Of Accommodation Types

Lodgit Desk uses a list of accommodation types that were defined by the German Tourism Association (DTV), the German Hotel Association (DEHOGA) and the German Spas Association (DHV).

Accommodation types

All-Suite Hotel
This type of hotel offers accommodation only in suites.

Aparthotel / Apartmenthotel
This type of hotel offer accommodations in studios or apartments.

Farm
A farm is a place where agricultural and similar activities take place, especially the growing of crops or the raising of livestock.

Boarding House
A boarding house is an accommodation service (usually in the rural areas) that will allow accommodation for a longer period of time. The service can go from minimal to full room service.

Renting out holiday apartments or homes
See Holiday apartments / homes

Inn
An inn is usually a lodging establishment that offers accommodations as well as food and drink.

Guesthouse
See Lodging House.

Hotel
A hotel is a lodging establishment that offers a front desk, services, daily cleaning services, other establishments and at least one restaurant for guests and passers-by. A hotel should have more than 20 rooms.

Hotel Garni
A Hotel Garni is a hotel that offers accommodation, breakfast, drinks and serves only snacks and small dishes.

Youth Hostel
A youth hostel offers short accommodation for mostly young people. Food and drink is offered to guests only. Youth hostels also offer programs and activities for educational or recreational purposes.

Sanatorium
This is a lodging establishment in a health resort or a therapeutic place. It is oriented towards the guests of this resort.

Spa Hotel
This is a lodging establishment in a health resort or a therapeutic place. It is oriented towards the guests of this resort. It also offers its own therapies and treatments.

Wellness Clinic

A wellness clinic is a lodging establishment with a hospital character. It's under medical management and offers ongoing medical care. Usually, local remedies are used for therapies and the establishment meets the typical requirements such as accessibility and food supply, as well as patient needs.

Motel

A motel is oriented towards drivers that look for lodging. It usually has a close-by parking area.

Lodging House

This is a lodging establishment that offers accommodation for more than one night and food is offered to guests.

Camp Ground

A camp ground is a fenced area that allows camping, i.e. the stay with tents, caravans or motorhomes. It is often managed by a private owner.

Renting out private rooms / lodgings

See Private rooms / lodgings

Source: Deutscher Tourismusverband e.V. (DTV)

Categories for rentable units

Apartment
This is a place with separate sleeping and living areas as well as a cooking area.

Double Bedroom
This is a room for two people with a double bed or two single beds that were put next to each other.

Single Bedroom
This is a room for one person.

Family Room
This room is for three or more people, at least two of the sleeping accommodations are suited for adults.

Holiday Apartment
A holiday apartment is an apartment with a sanitary area and an area for food preparations where guests can stay for a limited amount of time.

Holiday Home
A holiday home is a house with a sanitary area and an area for food preparations where guests can stay for a limited amount of time.

Junior suite
A junior suite is a room with a separate area for sitting.

Maisonette
A maisonette is an apartment that extends over at least two stories which are internally connected.

Shared Room
This is a room for three or more people.

Penthouse
A penthouse is an apartment that lies in the topmost storey of a multi-storey house and has a large roof terrace.

Private rooms / lodging
A private lodging is lodging in a private house that have no more than eight beds and are not subject for authorisation.

Dormitory Bed
A dormitory bed is in a room with several sleeping accommodations for people that belong to a group (or not).

Studio
This is an accommodation with one room and a cooking area.

Suite
A suite is an accommodation with separate, connected sleeping and living rooms.

Twin Bedroom
This is a room for two people in two separate beds.

Tent
A tent is a portable shelter (usually of canvas stretched over supporting poles and

fastened to the ground with ropes and pegs) for one or more people.

Car + Tent
see above with a car

Car + Trailer
A trailer can be connected to a car and can be lived in.

Caravan
This is a car-like motor-vehicle that can be lived in. It is often similar to a trailer.

Source: Deutscher Tourismusverband e.V. (DTV)

Price units in Lodgit Desk

Here you can find an overview over all price units that can be used in Lodgit Desk.

... for accommodations (in Object Management)

For all examples, we are using a demo booking from Dec 12, 2017 to Jan 4, 2018.

per night

This price unit multiplies the base price with the number of nights of the booking. The price unit **per night/person** multiplies the base price with the number of nights and with the number of guests of the booking.

*The demo booking covers **10 nights**. For a price of $10/night, the end amount would be $100.*

per day

This price unit multiplies the base price with the number of days of the booking. The price unit **per days/person** multiplies the base price with the number of days and with the number of guests of the booking.

*The demo booking covers **11 days**. For a price of $10/days, the end amount would be $110.*

per week

This price unit multiplies the base price with the number of weeks of the booking. The weeks are calculated nightly, e.g. a booking of 3 nights would cost 3/7 of the base price.
The price unit **per week/person** multiplies the base price with the number of weeks and with the number of guests of the booking.

*The demo booking covers **1 week and 3 nights**. For a price of $210/week, the end amount would be $300.*

per week (daily rates)

This price unit multiplies the base price with the number of weeks of the booking. The difference is that here, the weeks are calculated daily, not nightly.
The price unit **per week/person** multiplies the base price with the number of weeks and with the number of guests of the booking.

*The demo booking covers **1 week and 4 days**. For a price of $210/week, the end amount would be $330.*

per month

This price unit multiplies the base price with the number of months of the booking. This price unit does not do daily or nightly rates, the base price is multiplied with every month that's started for the booking (one month leads up to the equivalent date of the following month). Entries in Price Management have no influence on units with this price unit; and the price unit cannot be selected in Price Management.
The price unit **per month/person** multiplies the base price with the number of

months and with the number of guests of the booking.

> *The demo booking covers **1 month**. For a price of $500/month, the end amount would be $500.*

per year

This price unit multiplies the base price with the number of months of the booking. This price unit does not do daily or nightly rates, the base price is multiplied with every year that's started for the booking (one year leads up to the equivalent date of the following year). Entries in Price Management have no influence on units with this price unit; and the price unit cannot be selected in Price Management.
The price unit **per year/person** multiplies the base price with the number of years and with the number of guests of the booking.

> *The demo booking covers **1 year**. For a price of $10,000/year, the end amount would be $10,000.*

flat fee

Whenever this price unit is used, the base price is the end price and will not be influenced by the booking time frame. Entries in Price Management cannot influence bookings using this price unit; this price unit is also not available in Price Management. Also, this price unit can only be selected for rentable units, however, for extras, the price unit "per piece" can be used.
The price unit **flat fee/person** multiplies the base price with the number of guests of the booking.

> *No matter the time frame of the booking, the end price is the same as the base price.*

... for services (in Extras Management)

per person

This price unit multiplies the base price with the number of guests of the booking.

per piece

This price unit multiplies the base price with the amount entered within the booking. Similar price units are **per night, per day, per week, per week (daily rates), per month, per year, per pair, per hour, per litre, per kWh, per m3**.

ATTENTION, also the time-related price units as per night, per day, ..., per year, see above, are calculated exclusively with the indicated number of pieces and NOT automatically with the time frame. If this is desired, the price unit for each [time frame]/piece must be selected, see below.

per [time frame]/person

This price unit multiplies the base price with the time frame as well as with the number of guests entered in the booking.
Those price units are **per night/person, per day/person, per week/person, per week/person (daily rates), per month/person, per year/person**.

per [time frame]/piece

This price unit multiplies the base price with the time frame as well as with the

amount entered in the booking.
Those price units are **per night/piece, per day/piece, per week/piece, per week/piece (daily rates), per month/piece, per year/piece**.

Categories for rentable units   Up   Booking statuses in Lodgit Desk

Booking statuses in Lodgit Desk

Here you'll find some information on all the booking statuses Lodgit Desk has to offer.

Tentative

This is the lowest booking status; it's the default status for all bookings that you draw into the reservation schedule. A main contact must be added to the booking before you can change the status (unless you want to change the status to Disabled). You cannot create confirmations or invoices for bookings with this status.

You can decide if time frames with Tentative bookings are to be shown as vacant when synchronising with the online modules.

The function "Split" is not available for bookings with this status.

> **Important:**
> When changing the main contact, dates or rentable unit, the price information will automatically be reloaded from Object and Price Management. If you've manually edited the price, change the status of the booking immediately to avoid unwanted changes!

Offer

Bookings will automatically receive this status when an offer was saved/printed for them. You cannot create invoices for bookings with this status.

You can decide if time frames with Offer bookings are to be shown as vacant when synchronising with the online modules.

Confirmed

Bookings will automatically receive this status when a confirmation was saved/printed for them. You cannot create offers or invoices for bookings with this status.

Booked

You cannot create offers or confirmations for bookings with this status.

Checked In

Bookings with this status can no longer be moved and their arrival date cannot be changed. The departure date, however, can still be changed. You cannot create offers or confirmations for bookings with this status. Guests in bookings with this status will automatically listed under "Current Guests" in the reservation schedule.

Bookings cannot receive this status when their arrival date lies in the future.

Checked Out

Bookings with this status can no longer be moved, lengthened or shortened. You cannot create offers or confirmations for bookings with this status.

The function "Split" is not available for bookings with this status. Bookings with this status will count as "vacancy" online (Online Booking System and Channel Manager).

New Online Booking

Bookings that you receive via the Online Booking System will automatically have this status. Bookings with this status also mostly have an automatically generated reservation number.

Bookings with this status cannot be deleted immediately. Trying to delete them will mark them for deletion instead. After synchronising with the Online Booking System, these bookings will receive the status Cancelled Online Booking. Only then, they can be deleted.

Cancelled Online Booking

Online bookings will receive this status when you try to delete them. They will first be marked for deletion and then, after synchronising with the Online Booking System, they will receive this status. Now, you can delete the bookings from the reservation schedule.

The function "Split" is not available for bookings with this status.

Disabled

You do not need to add a main contact to bookings with this status. A label of specified text (e.g. renovation) will appear in the reservation schedule after the status Disabled. Bookings with this status do not count towards the analysis of occupancy rate and RevPAR. The maximum value possible for this analysis will also be adjusted accordingly, so that the rentable unit is viewed as non-existant for the duration of the booking.

The function "Split" is not available for bookings with this status.

Frequently Asked Questions

Here you'll find frequently asked questions and answers about working with Lodgit Desk.

Installing the 64-bit version under Windows
Moving your Database to a new Server
Transfer Lodgit database to a new computer
Download Server Database Backup
Postpone, shorten, extend billed bookings
Enter the opening balance of the cash register in the Lodgit cash book
Channelmanager DIRS21: Set Up Inheritance
Database Server and License Data Update
Price for final cleaning to be added to the first night's stay
Change Payment Method of Invoices
Renew Your License
Completing of the HESTA form (CH)
Which POS systems are compatible with the Lodgit interface?
MappingMaster - Transfer of prices and linking of extra items
Database Server: Database Malformed
Database server and "vanished" online bookings or "changing" availabilities
How to connect Lodgit and Airbnb
How do I delete an online booking?
Highlighting blocking periods in the Lodgit Online system Booking Calendar
GoBD-export - How do you access the data during a tax audit?
Seperate Invoices for one Booking
Display Options for the Occupancy Plan
Completing and setting the cash book to 0
macOS High Sierra: Do not store database in the iCloud
Database server error: Database is locked
Transmitting prices and linking extra items to MappingMaster
Use Lodgit Desk on more than one computer
Assign booking
Charge cancellation fees
Sell and redeem vouchers in Lodgit Desk
Create Comments and Remarks on Invoice Items
Highlighting Special Periods in the Occupancy Plan
Invoice with Company Address but Registration Form with Guest Address
Attachments sent by mail will be sent to the recipient as 'winmail.dat'
Change Language of Lodgit Desk
cubeSQL: Disconnected / switch back to local database

Installing the 64-bit version under Windows

A 64-bit Windows version of Lodgit Desk is available from version 2.1.1 onwards.

> Please note: Please make sure that you backup your current database before installation.

1.) Uninstall the 32-bit version of Lodgit Desk via the *Control Panel > Programs > Uninstall Program*

2.) Download the 64-bit version by following this link: Download the 64 bit version

3.) Follow the setup instructions.

> Attention: The internal installer refers to the 32-bit version. Therefore, please do not install upcoming updates internally from Lodgit Desk. As new versions are released, you will find the link to a new setup file on this page.

FREQUENTLY ASKED QUESTIONS   UP   MOVING YOUR DATABASE TO A NEW SERVER

Moving your Database to a new Server

These are the steps to securely move your database from one server to a new one;

1. Close all Lodgit Desk installations in your network.

2. On your **old server** open the cubeSQLadmin App.

3. Locate your database in the preferences
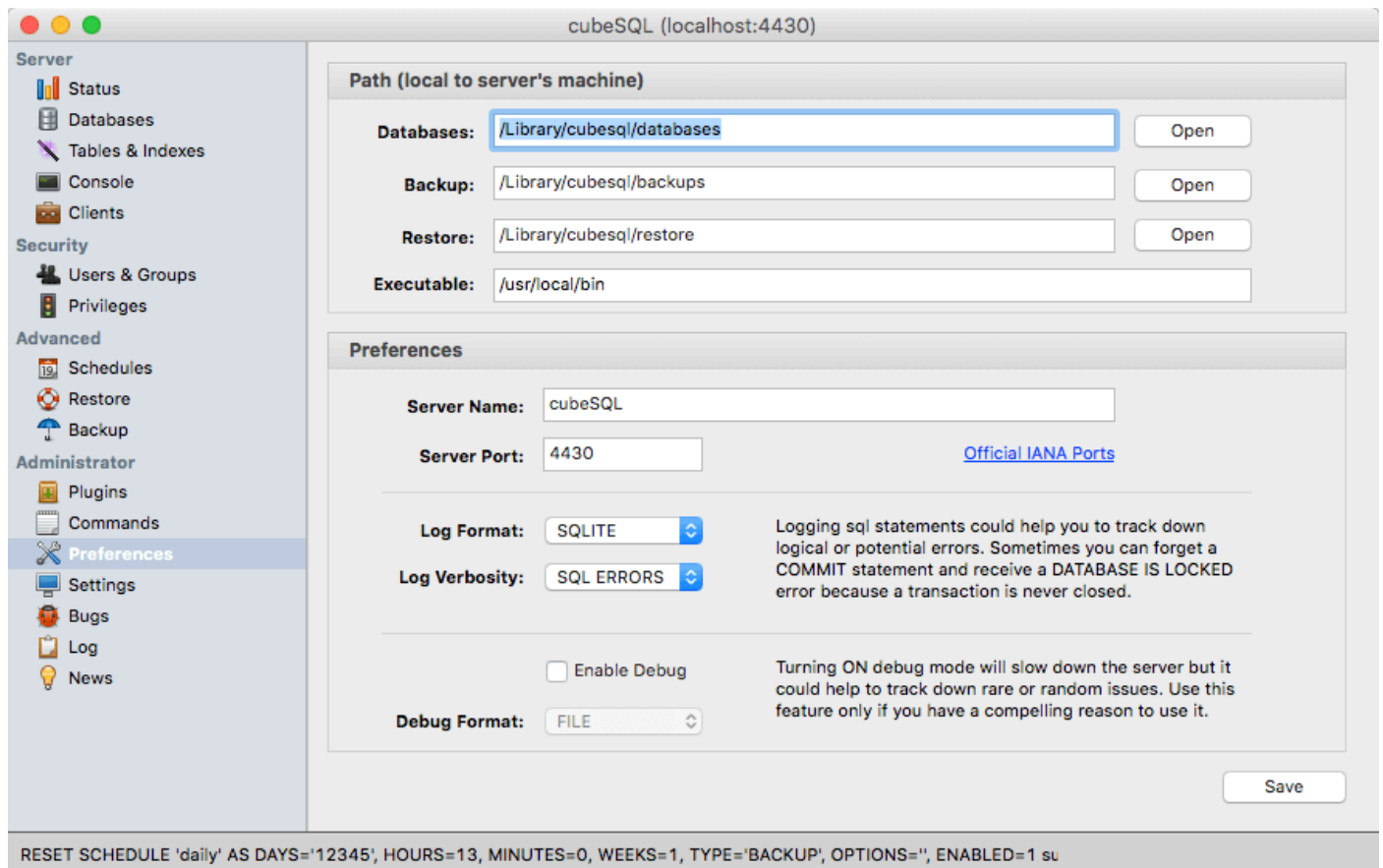
4. Open the folder containing your Database in the Finder/Explorer a copy the file Lodgit Database.lxdb to your **new computer**.

5. Shut down your **old server**.

6. Install the cubeSQL server on your new computer.

7. Start Lodgit Desk on this new computer (Lodgit Desk will start up with an error, that it is not able to connect to the database server. Ignore this error.) It will start up with an empty local database.

8. Click on File > Restore Database from backup and choose the Lodgit Desk.lxdb you got from your old server.

9. Click on File > Connect to Database server. You will be notified, there is no Lodgit Database on the server, and whether you want to transfer your local database.

10. Click Yes. Your database will start uploading to your new server. This might take a couple of minutes.

11. You should now be able to connect your other installations to the new database server. Please heed that your new server most likely has another IP-Adress as the old one.

Transfer Lodgit database to a new computer

1. First make sure that automatic synchronisation is deactivated on the old computer. You can find this setting under under "Administration"> "Synchronization and Online Modules". If necessary, uncheck the box "Use this computer for automatic synchronisation".
2. The easiest way to find the file "Lodgit Database.lxdb" is via the menu command "Open database folder...". within Lodgit Desk, which can be found under "File".Please select the option "Open and Exit" in the window that opens, so that the program Lodgit Desk is closed before copying the file. Otherwise there is a risk of data loss!
3. Copy the file "Lodgit Database.lxdb" to a storage medium (USB stick or similar).
4. Install Lodgit Desk on your new computer by downloading the program again and then running the installer.
5. Start Lodgit Desk on the new computer so that a new work database is created there.
6. Execute the menu command "Open database folder..." on the new computer within Lodgit Desk again and then close Lodgit Desk.
7. Replace the file "Lodgit Database.lxdb" on the new computer by the file of the same name on your storage medium, which must of course be connected to the new computer.

Your program settings are stored in the database since version 1.8.x and therefore do not have to be entered again on the new computer!

Download Server Database Backup

To download a backup of the server database, please open the program cubeSQLAdmin. There please go to >Backup and then click on the >Show Backups button in the upper right corner to display the backups, see screenshot.
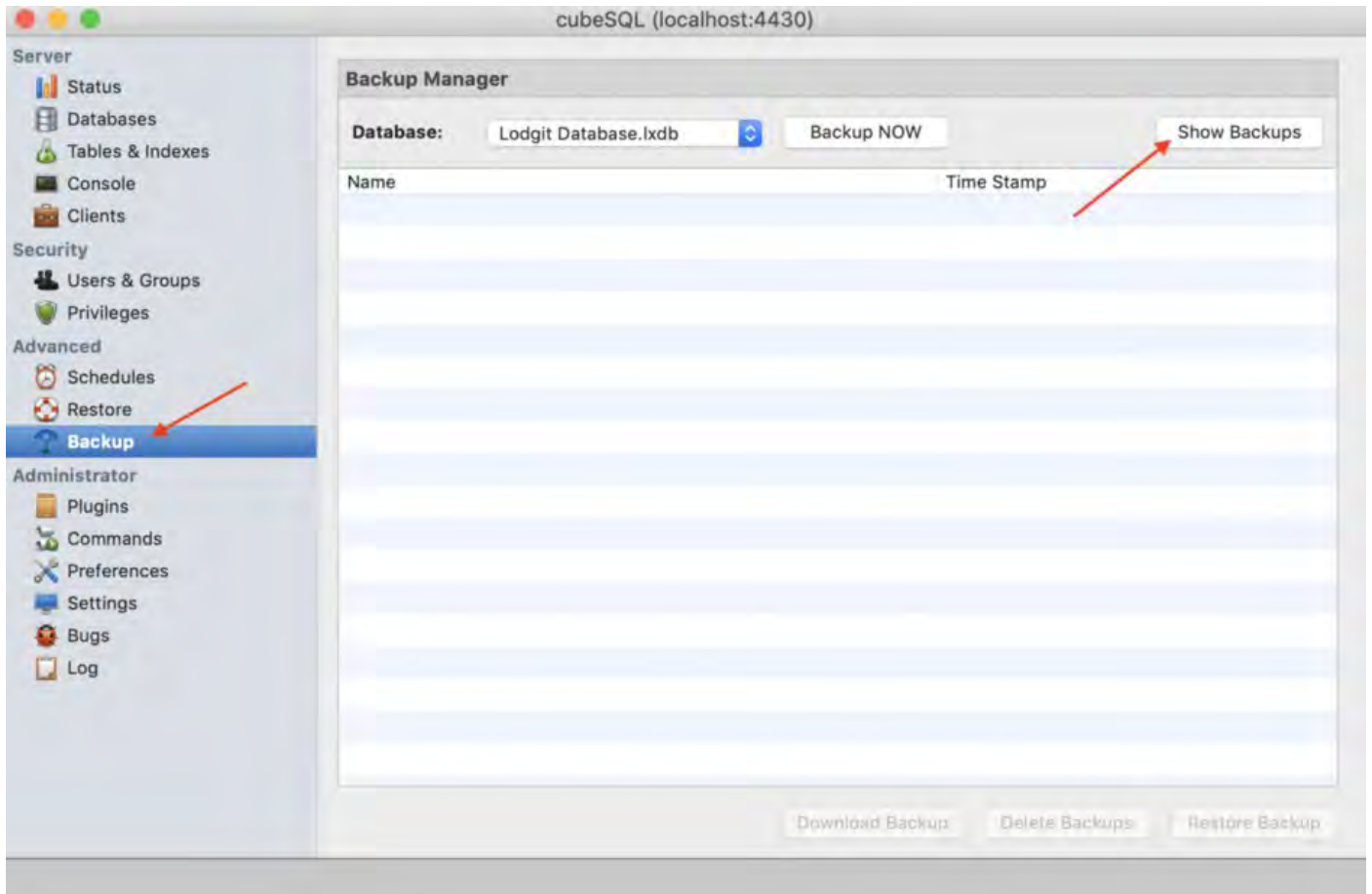
The created backups are then visible, see screenshot below, and can be marked by clicking on them. Once this is done, the previously grayed out buttons below become selectable. Please click on >Download Backup and then in the small window that opens, click on >Yes to download the desired backup.
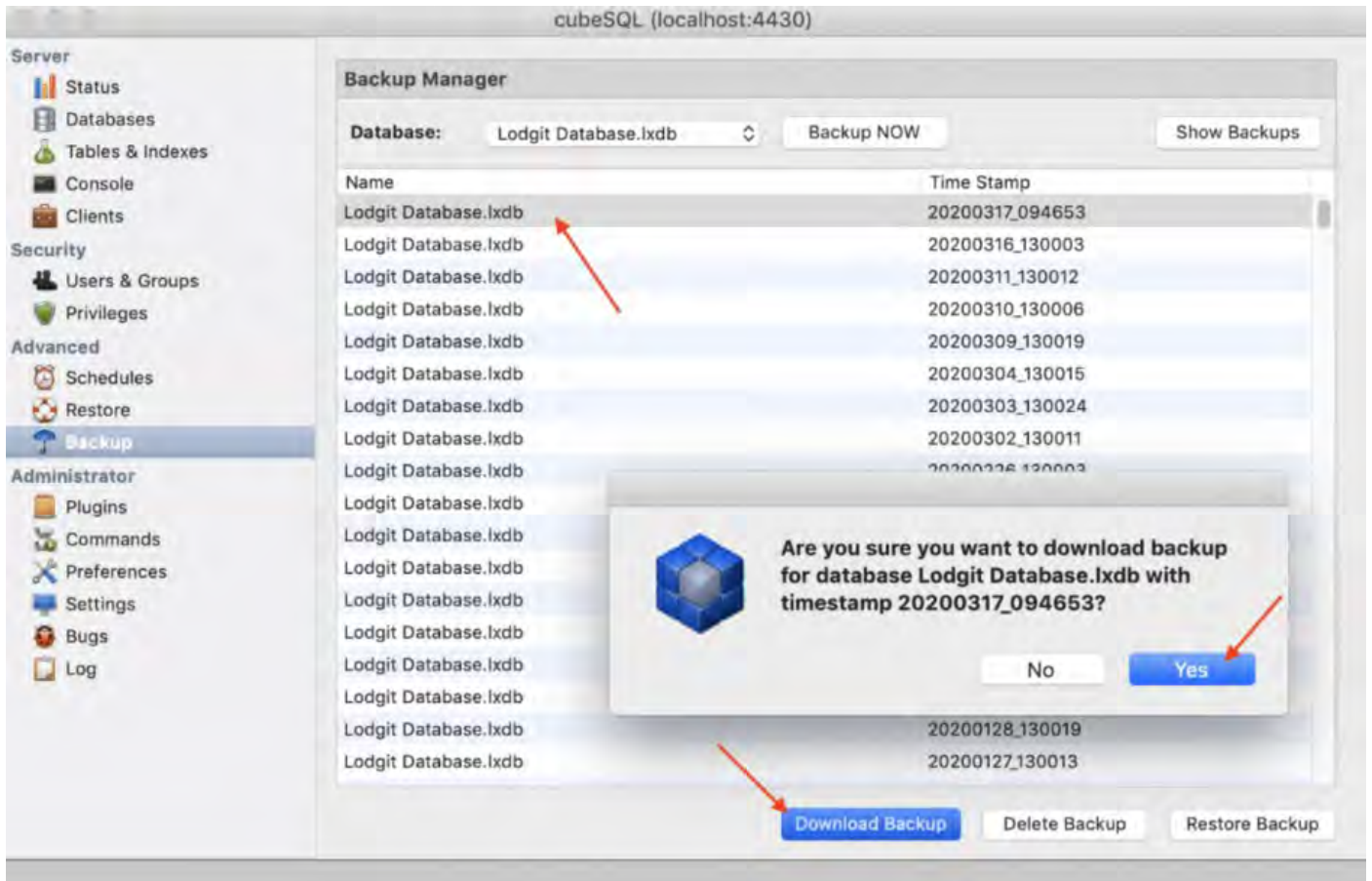
Please note that the backups are provided with a so-called timestamp, which follows this scheme YYYYMMDD_hhmmss, i.e. YearMonthDay_HourMinuteSecond.

TRANSFER LODGIT DATABASE TO A NEW COMPUTER   UP   POSTPONE, SHORTEN, EXTEND BILLED BOOKINGS

Postpone, shorten, extend billed bookings

As of version Lodgit 1.18., you cannot move, shorten or extend bookings that you have billed, or only to a limited extent.

The reason for this is that according to the "Principles for the proper management and storage of books, records and documents in electronic form and for data access (GoBD)", there may no longer be any differences between the invoice-founding records (in Lodgit Desk, the booking entered in the occupancy schedule) and the invoices.

Move

You can only move settled bookings via the opened booking window by clicking on the small arrow/triangle on the right under>Rental units and selecting the rental unit into which you want to move the booking.

Shorten

You can shorten a posting by entering a new end date. To do this, click on the lock symbol in the open booking window either before>departure or before>nights. You are then asked whether you want to unlock the corresponding input field. If you say yes, you can now bring the departure date forward or reduce the number of nights.
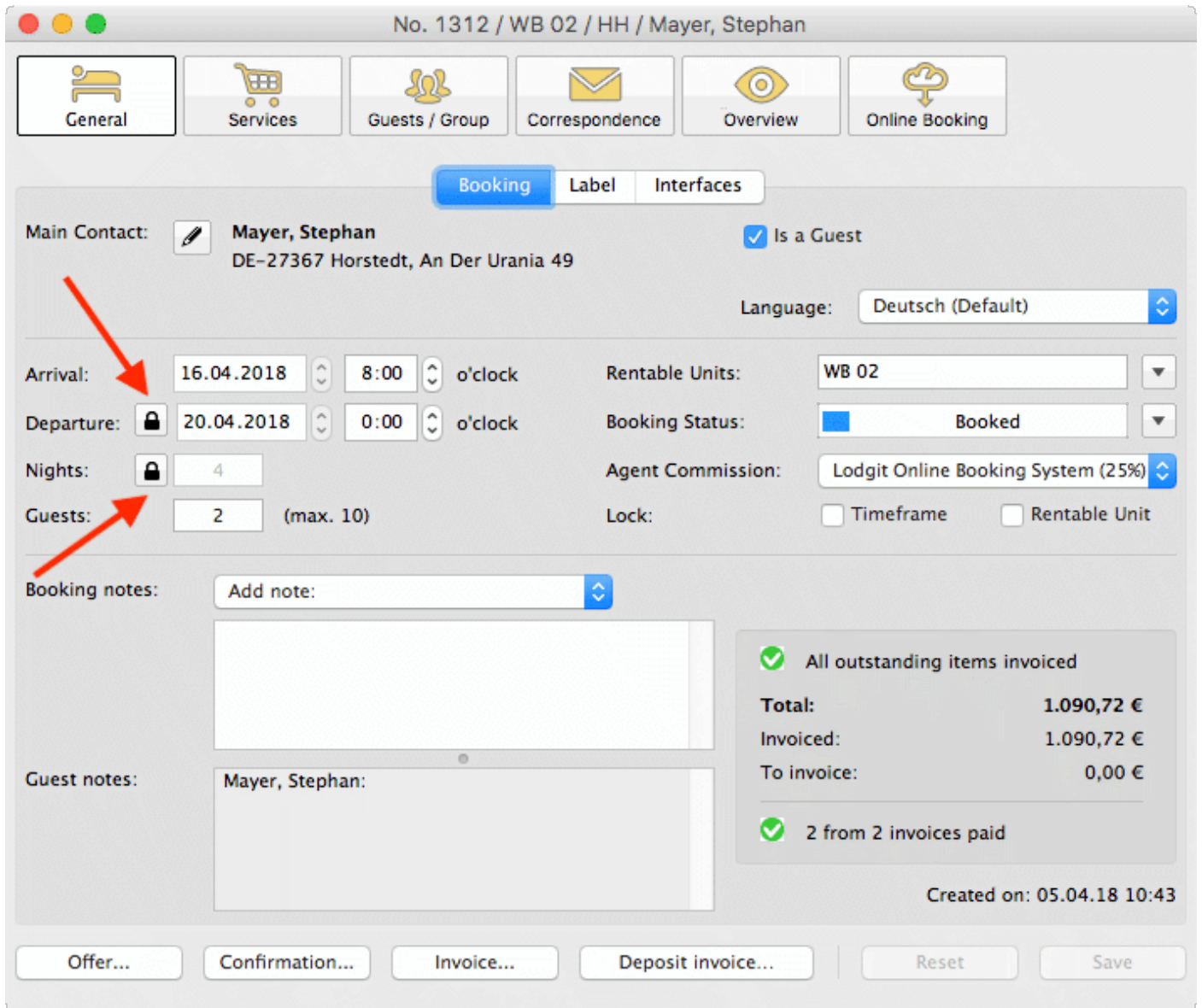
Please note: If you have inadvertently shortened the booking too much and have already saved it, you cannot extend it again afterwards.

Lengthen

You cannot lengthen bookings that you have already billed.

DOWNLOAD SERVER DATABASE BACKUP   UP
ENTER THE OPENING BALANCE OF THE CASH REGISTER IN THE LODGIT CASH BOOK

Enter the opening balance of the cash register in the Lodgit cash book

The amounts of all invoices, correction invoices and receipts with the payment method "cash payment" are automatically entered into the Lodgit cash book, sorted according to the date of the respective document. The positive (income) and negative (expenses) amounts are added up consecutively in the "Balance" column. The current cash balance can also be seen at the bottom right of "Total".

To adjust this to a certain opening balance, you would have to use>Administration>Create receipt to either make a private withdrawal or deposit or the Cash to Bank transaction or vice versa.

As an offsetting account you can also enter your accounting account for transactions there, see screenshot below.
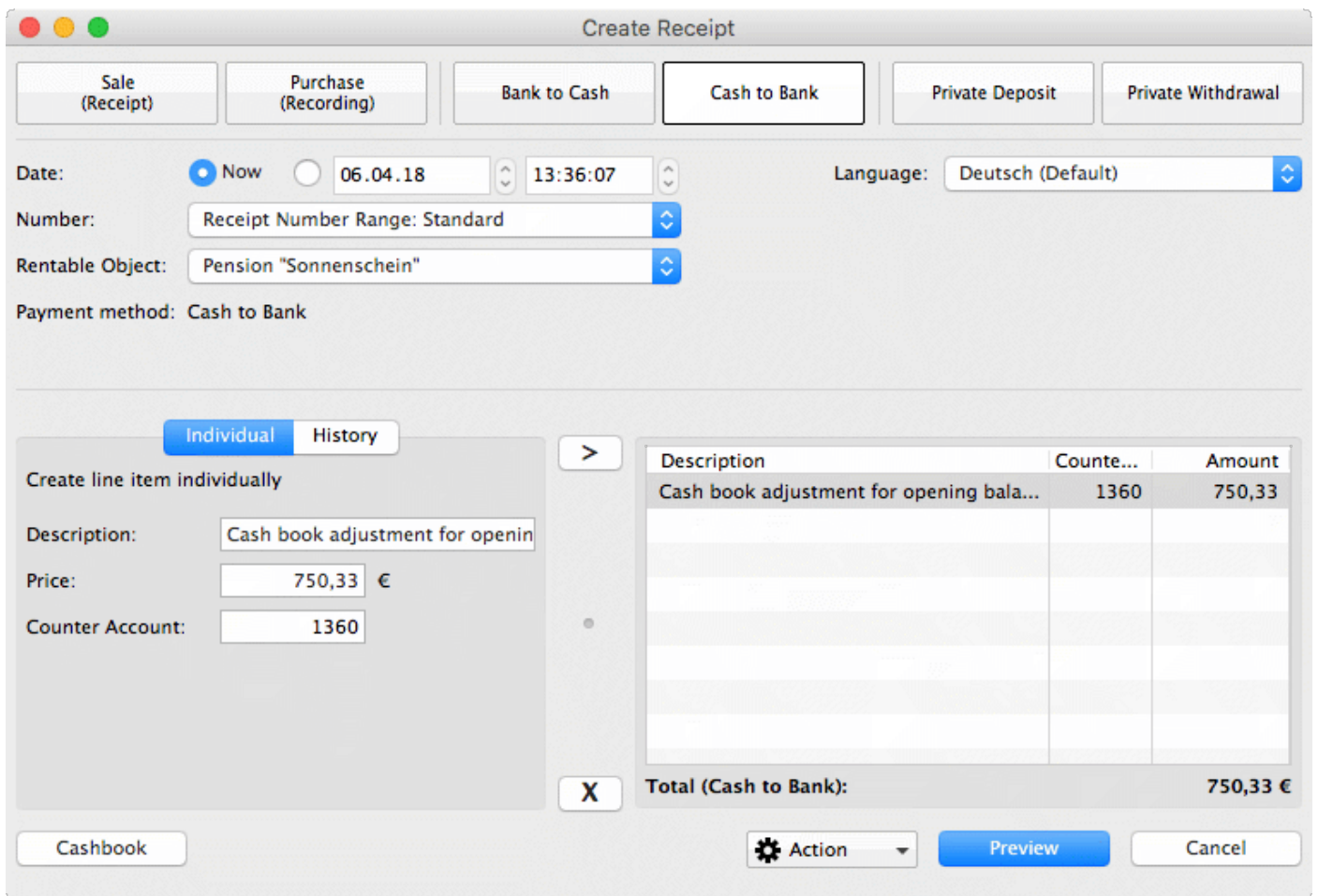
Please note that only cash payments are recorded in the cash book, but no credit or EC card payments, for example. Furthermore, no VAT rates are shown.

In principle, we recommend that you make a daily cash balance.
Further information on creating receipts or the cash book.

POSTPONE, SHORTEN, EXTEND BILLED BOOKINGS   UP   CHANNELMANAGER DIRS21: SET UP INHERITANCE

Channelmanager DIRS21: Set Up Inheritance

It is possible to set up the double room for single use in the Channel Manager so that incoming bookings in Lodgit Desk can be assigned to the corresponding rental units.

The requirement is that the inheritance is set correctly in DIRS21. You can either do this yourself or ask your DIRS21 account manager.

The setting works as follows: You must assign the double room (DR), which can also be used individually, to be used as a single room by means of an external code.

Please log in to your DIRS21 user account and click on the pen icon at the front of the master data of the room you wish to edit.

Then click on the tab Hotel software and enter the code of the room from which you want to inherit.
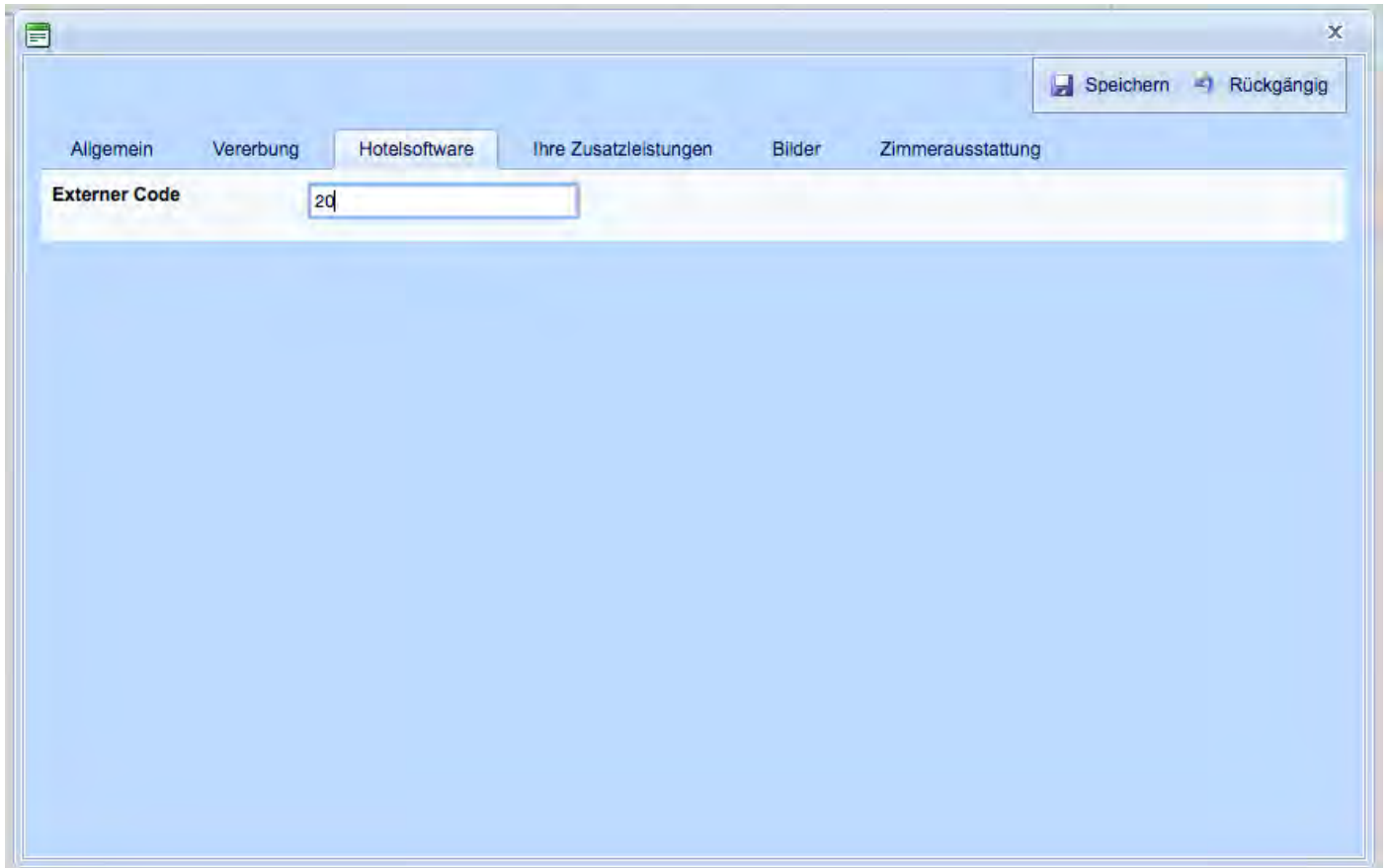
ENTER THE OPENING BALANCE OF THE CASH REGISTER IN THE LODGIT CASH BOOK   UP
DATABASE SERVER AND LICENSE DATA UPDATE

Database server and license data update

You work with the database server and when you restart Lodgit Desk, your computer always"forgets" the license. You will be notified that you do not have a license to work with the server version.

You can probably fix the problem with a few simple steps. You only need to update your license data once in local and once in database server mode.

Please proceed as follows:

1. Launch Lodgit Desk
2. Activate Lodgit Desk in local mode via the dialog "Software Activation" (file > software activation > enter license data and click the button "update license data").
3. Then connect Lodgit Desk to the CubeSQL server
4. Activate Lodgit Desk a second time (now in database server mode) via the "Software Activation" dialog.

Now you have updated the license data in both local and server mode and the problem should no longer occur.

Channelmanager DIRS21: Set Up Inheritance   Up
Price for final cleaning to be added to the first night's stay

Price for final cleaning to be added to the first night's stay

If you do not want or are not allowed to show the price for the final cleaning separately in the invoice and want to add it to the price for the first night, you must divide the price section for the accommodation.

Please open the booking and go to>Services>Accommodation. Set a checkmark at the accommodation period at which you want to add the final cleaning and which you therefore want to split. Then click on the small triangle next to the> gear symbol at the bottom left. Then select>Split the selected price section..., see screenshot.
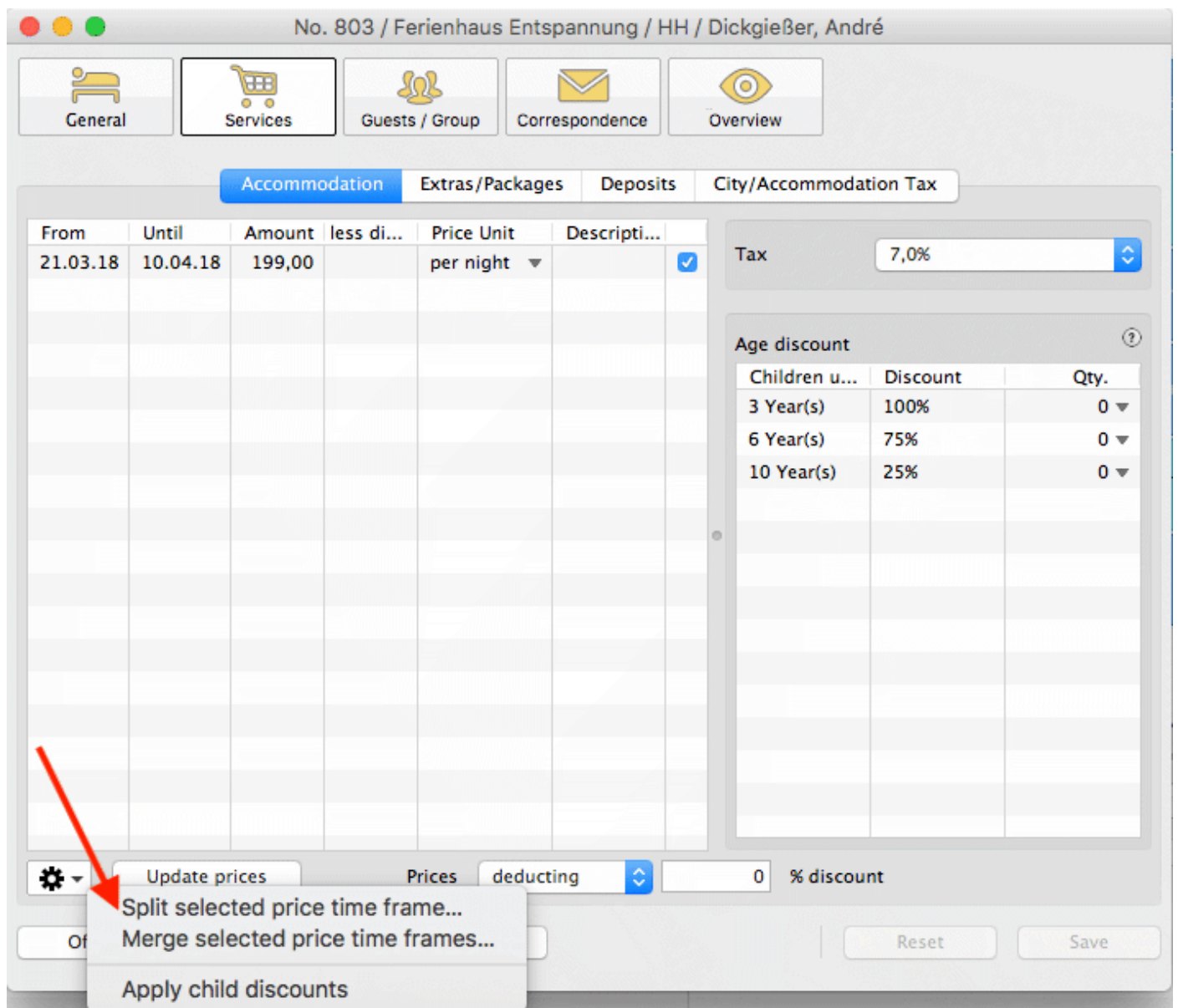
The>Split Selected Price Section window opens. Please enter the date on which the price section should be split, so in this case enter the day following the start of the booking. For your orientation you can name the two price sections so that you know later why you changed the price for the first night, see screenshot.

You have now turned one price section into two and can edit the prices and price units for each of the sections separately. With the price for the first night you can now increase the price for the final cleaning, see screenshot.

NOTE: Please check in advance which price unit fits best: If the price for the final cleaning is a fixed price, person-dependent prices like e.g. per night/PERSON are more complicated, because you must calculate the final cleaning price for each person, in order to enter the correct price.

DATABASE SERVER AND LICENSE DATA UPDATE   UP   CHANGE PAYMENT METHOD OF INVOICES

Change payment method of invoices

In Lodgit Desk, cash invoices are considered to be paid immediately and can therefore no longer be changed, since in this case the document created and the payment are one in Lodgit Desk.

If you have issued an invoice for a payment method other than "cash payment", you can still change this if the invoice is "open". In case of a change, however, the payment method "cash payment" is not available.

We needed to include this so that Lodgit complies with the "Principles for the proper management and storage of books, records and documents in electronic form and for data access" (GoBD).

This means that if you want to change invoices from/to cash payment to/from another payment method, you must cancel the invoice to be changed and create a new invoice with the desired payment method.

Renew Your License

Shortly before your Lodgit Desk license expires, you will receive an email informing you that you need to renew your license. How do you renew your Lodgit Desk license in its current form?

1. Open the Software Activation window via File> Software Activation.

2. Click on the button "Go to Shop" at the bottom left.
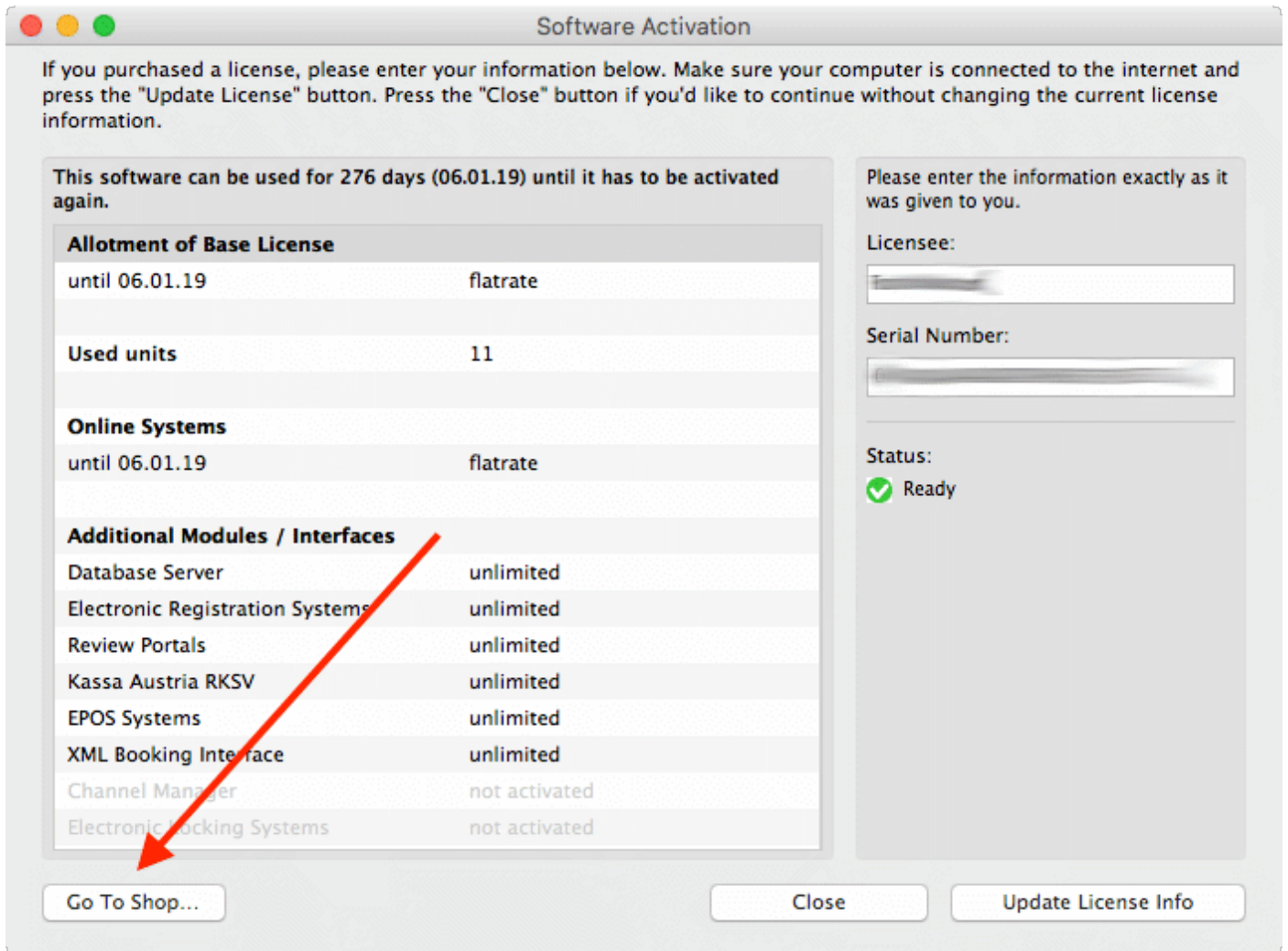
Now our shop opens in your browser.

3. Here you only have to select the base license (10, 20 or more rental units) and term (1, 2 or 5 years) and click on "Select".

4. In the next steps you only have to confirm the data and additional modules already recorded for you.

5. After selecting your desired payment method and confirming the general terms of contract and any additional agreements for the online booking engine or the channel manager interface, you purchase your new license by clicking on the "Order" button.

The confirmation email of your new license is usually in your inbox a few seconds later.

Change Payment Method of Invoices   Up   Completing of the HESTA form (CH)

Completing of the HESTA form (CH)

As an accommodation establishment in Switzerland, you must complete a monthly accommodation statistics form, the so-called HESTA form, and send it to the Federal Statistical Office (BFS).

Find the data you need quickly and easily in Lodgit Desk. Where exactly, we show you here:

Arrivals and **overnight stays** can be found in the **country report**.

Please go to>Lists>Accommodation Statistics. In the Accommodation Statistics window, select the desired period (usually the previous month of the current year) on the left and the desired object(s) on the right. Arrivals, overnight stays and departures are displayed sorted by country and their respective sums at the bottom. The sum corresponds to the total of the HESTA form.

Please enter the appropriate numbers in the HESTA form.

Now click on the button "Room Nights" at the bottom left.

The "Occupancy and Performance Indicators" window for the same period appears.

Please select your property(s) at the top right and the booking status below. For booking statuses, you should only check the "checked in" and "checked out" statuses so that you can enter the correct data.

In the column "nights*rental units" you will find the so-called "room nights" or the number of occupied rooms or camping sites (monthly total).

Please enter this value in your HESTA form.

To calculate the average income per person per night (without breakfast), you need the accommodation sales for the corresponding month. You can find it under>Lists>Lodging-List. This list is based on all bookings in the occupancy plan, whereby sales are calculated on a daily basis.

Please select the appropriate period from the list of accommodation, your object(s) in the top right-hand corner and again the statuses "Checked in" and "Checked out".

In the column on the far right you will find the daily turnover of your bookings entered in Lodgit Desk.

You now have all the data and can calculate the average income per person per night according to the calculation formula and then enter it in the HESTA form.

RENEW YOUR LICENSE   UP   WHICH POS SYSTEMS ARE COMPATIBLE WITH THE LODGIT INTERFACE?

Which POS systems are compatible with the Lodgit interface?

Via the "POS systems" interface, the restaurant consumption of your overnight guests can be transferred to Lodgit Desk and thus billed on the guest's final bill. But which systems are compatible with Lodgit Desk?

Lodgit Desk supports the protocols Standard (PROTEL compatible), Vectron and GASTWARE. The best way to find out whether the POS system you are using supports one of these two protocols is to contact the manufacturer or sales department.

Which data is transferred?
Lodgit Desk creates a list of checked-in guests and their rooms/bookings. It serves as an orientation and allocation aid for the POS. In return, the cash register creates a file with the consumption and the corresponding guest, which is imported into Lodgit Desk. Consumption items that cannot be assigned appear in an error log; they can then be processed manually.

Please note: Lodgit Desk will not transfer any settlement items to the POS system!

Completing of the HESTA form (CH)   Up
MappingMaster - Transfer of prices and linking of extra items

MappingMaster - Transfer of prices and linking of extra items

Prices for rental units

Basically Lodgit only transfers **simplified prices** (compared to the Lodgit price management) to MappingMaster, because this is technically impossible. The prices are transferred in the price table, which is entered under>Administration>Synchronisation and Online Modules>MappingMaster>Prices and duration for the respective category.
Prices are not transferred directly from the Lodgit price management.

The **default occupancy** of each MappingMaster category is received by Lodgit from MappingMaster.

The **Base Price** must always be entered manually. This is the price that is taken if no other price is entered in the price table for the respective period.

The prices are ALWAYS per night for the respective rental unit with standard occupancy. A differentiation of the price unit is not possible here (unlike in the Lodgit price management).

However, prices from the Lodgit price management can be imported into the table. Please go to the gear wheel below the list and then click on>Load prices from the price management.

The>Price Comparison window opens. You can choose whether you want to import the>prices for rental units or the>category prices from the Lodgit price management. Then select the rental unit or category whose prices you want to import for the selected MappingMaster category. Prices are imported with the price unit "Per night", which corresponds to the standard occupancy.

You can modify this as follows:

You set the check mark at ...

- **Ignore default occupancy**
  ALL prices are loaded independently of the NUMBER OF PERSONS, i.e. with a standard occupancy of 2 persons also those for e.g. 1 or 3 persons, if these are available.
- **Ignore price unit**
  ALL prices are loaded independently of the PRICE UNIT, e.g. also those for 1 week.
- **Delete current price variations of the MappingMaster category XXX**
  Check this box to prevent double display of identical prices.

The prices in the price table for MappingMaster are interpreted as the price for the standard occupancy per night, regardless of which price unit you had in Lodgit price management and to which number of persons you referred there.

If several prices are entered for an identical period, the highest price is always used.

Extra Items

Prices for extra items cannot be transferred from Lodgit to MappingMaster, but extra items from a booking via MappingMaster can be linked to extra items from Lodgit.

For example, if you want to offer a room with breakfast, you should create a>product in MappingMaster, where you check the box "with breakfast" and then enter the price you charge for breakfast as>surcharge. A TOTAL price for room and breakfast (basic price + surcharge) will be transferred.

In Lodgit you have to link the extra item "Breakfast" with the MappingMaster extra item "Breakfast". Please make sure that the set price for the extra item "Breakfast" from Lodgit and the price for the surcharge in MappingMaster match at this point, otherwise the calculation will not work correctly, see below.

The price for Breakfast is usually "per night/ person", but the surcharge in MappingMaster is always "per night/ room".

If it is possible to occupy different numbers of people per room, such as "double room as single room for 1 person" and "double room for 2 persons", an independent product must be created in MappingMaster for each possible occupancy.

Example:
If you have entered a basic price of €86 for the room in MappingMaster, the room with breakfast is to be offered and you have entered a surcharge of €7, MappingMaster transfers a total price of €93. If a breakfast price of 7,-€ per night/person is entered in Lodgit, the price of 93,-€ will be interpreted as 86,-€ for the room and 7,-€ for the breakfast. For an occupancy with 2 persons there is a basic price of 79,-€, because 2 * 7,-€ (2 persons with breakfast à 7,-€) = 14,-€ will be deducted from the 93,-€ transferred. This means that you would have had to define a new basic price here in MappingMaster and set up a new product "with breakfast" for this product, for which the surcharge includes the price for breakfast for 2 persons.

Please note: Extra items are ALWAYS treated as a surcharge in Lodgit, which means that they are deducted from the total amount transferred.

Datenbankserver: Databank malformed

Lodgit Desk runs with the database server and it displays an error message that the database is malformed.

The following uses may cause the database to display the error "Database malformed" or "Database is locked". These errors are an indicator that the database is corrupted, leading to data loss.

ATTENTION: This error can occur, for example, if ...

... an instance of Lodgit Desk is connected to the database file via the database server CubeSQL and another instance of Lodgit Desk accesses the same database file directly.
... at least two different CubeSQL database servers can access the same database file simultaneously.
... at least two different instances of Lodgit Desk can access the same database file directly, without CubeSQL.
... another program accesses the same database file simultaneously or in addition to Lodgit Desk.

The above examples can also cause lead to: Database is locked

Before using an (obsolete) backup version of the database, you should first exclude other possible error sources:

1. Please rename your local database. Then try to open Lodgit.
2. If you still cannot access your database, make sure that Lodgit Desk is really closed on every computer. Open the CubeSQLAdmin and go to Database. Backup your TEST database by clicking on the test database and then selecting>Server in the menu bar at the top and then>Download Database . Save your test database. Please make sure that your test database is still selected and then delete it in the admin tool by clicking the button>drop.
3. If this also did not help, please check if the server database is entered as a local path in your lodgit.
4. Only if none of the previous 3 steps was successful, try to restore your database (to an older version) via your created backups.

MappingMaster - Transfer of prices and linking of extra items   Up
Database server and "vanished" online bookings or "changing" availabilities

Database server and "vanished" online bookings or "changing" vacancies

When using the database server and a channel manager/ online booking system at the same time, it sometimes seems as if online bookings simply disappear even though the Lodgit desk support assures you upon request that they have been transferred. It can also happen that your channel manager tells you that the availability seems to change all the time, sometimes the rental unit is transferred as occupied, sometimes as free.

This can be because you synchronise online with different databases (retrieve online bookings, transfer availabilities), e.g. because a computer in the network always switches to the local mode because it is not connected to the CubeSQL server and then erroneously synchronises with the local database in which the bookings you are looking for end or from which the availabilities are transferred.

Therefore, please make sure that the synchronisation is switched off in **local** mode for the work **and** test databases of every computer on which you want to work with Lodgit in parallel. Please also switch this off for the test database in database server mode.

1. In **local** mode (see screenshot 1, arrow: Reception (local)) first select the working database.
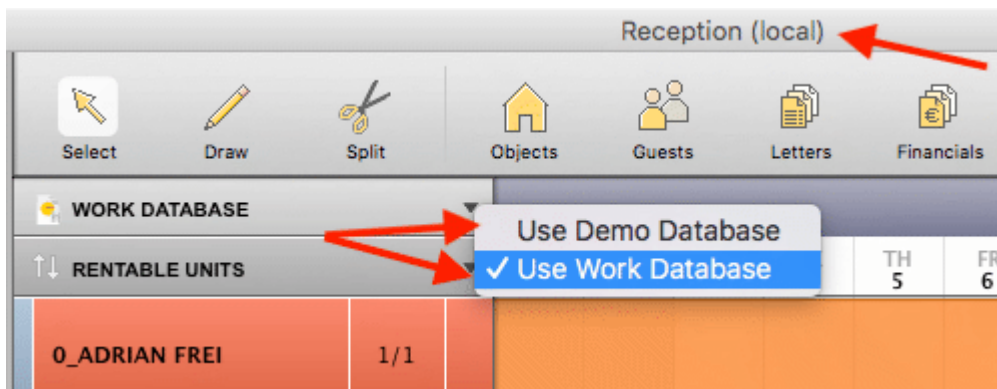
2. Then go to >Administration >Synchronization and Online Modules at the top of the menu bar and uncheck >Allow this computer for synchronisation if necessary (see screenshot 2, arrow).
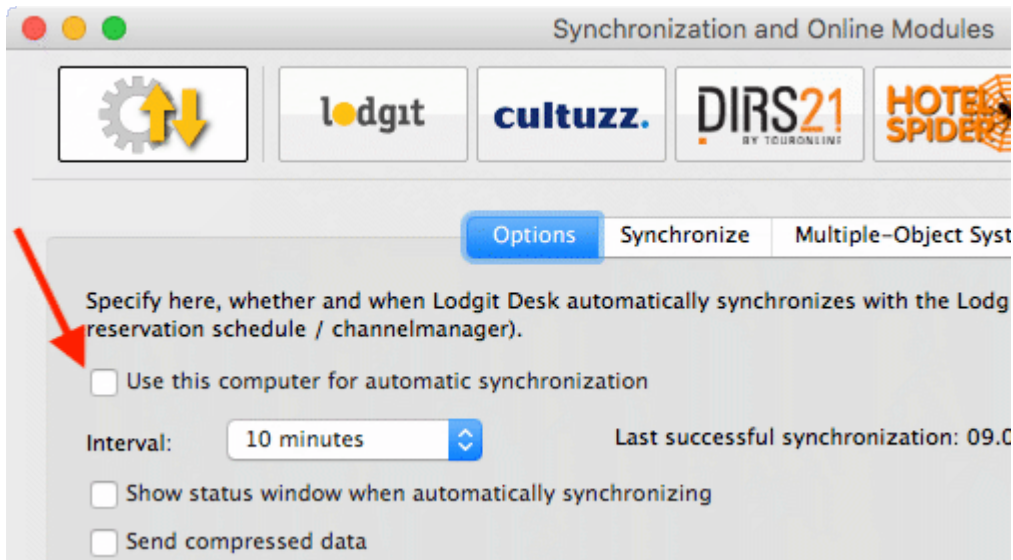
3. Repeat the process for the test database, see screenshot 1.

You must switch off synchronisation in both databases in local mode on each computer on which Lodgit Desk is to be used in parallel in the network.

4. Then switch to the **database server mode**. To do this, go to the menu bar at the top to >File (Mac) or >File (Win) and then to >Use database server.

5. Select the **test** database there and remove the check mark for the automatic synchronisation if necessary (see step 2. above).

6. Then select the **work** database and, if necessary, set the check mark at >Allow this computer for automatic synchronisation. You must allow synchronisation on at least 1 computer, but you can also set this on all computers.

The synchronisation must **ONLY** be activated for the **WORK** database in **SERVER** mode!
In ALL LOCAL databases and in the TEST database in SERVER mode the automatic synchronisation must be switched off.

With other settings, bookings can "disappear" or availabilities "change", since these accidentally end up in other databases or are transferred from them.

You can quickly see that the computer is in server mode by the blue square icon to the left of the> working database. If the symbol is white/yellow, the computer is in local mode, see screenshot 3 and screenshot 1.
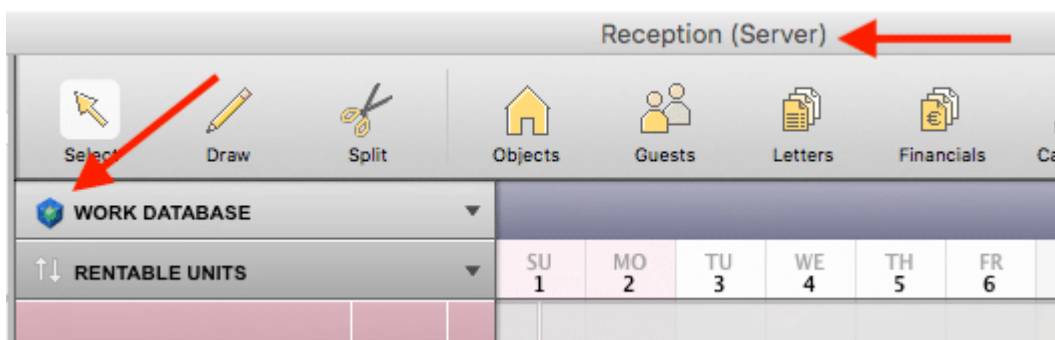
How to connect Lodgit and Airbnb

To connect Lodgit Desk with Airbnb you need the Lodgit Online System for the unit you want to connect to Airbnb and this has to be synchronised. To connect Lodgit Desk with Airbnb you need the Lodgit Online System for the unit you want to connect to Airbnb and this has to be synchronised.

1. Login to our customer area and navigate to "Lodgit Online Systems" > "Settings".
   Loggen Sie sich in den von Lodgit ein und navigieren zu Lodgit Online-Systeme > Einstellungen.
2. Select the rentable unit you want to synchronise with AirBnB.
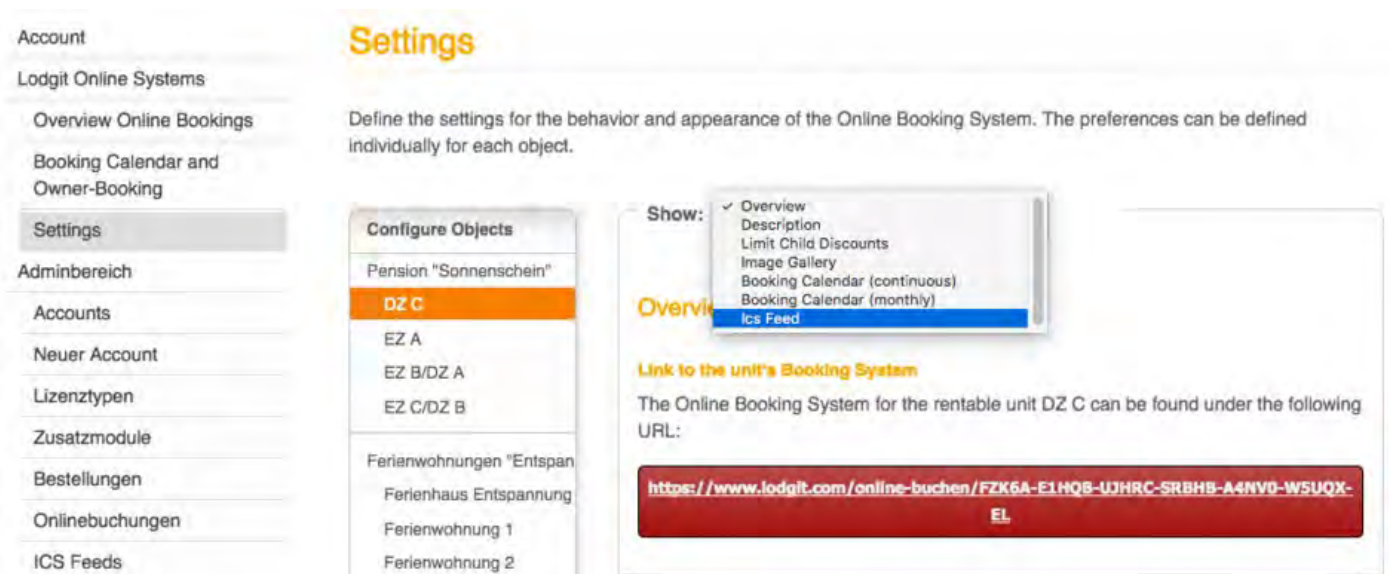
3. Check the box "activate ics Feed.

4. Copy the link to your ics feed (highlighted in red) and integrate it in your Airbnb listings according this FAQ.

How do I delete an online booking?

Bookings that are manually entered into the reservation schedule can be deleted by going to the command in the menu bar or right-click menu as well as hitting the DELETE key while having it selected.
If the booking came in through the Lodgit Online Booking System or the Channel Manager, the process is a little different:

If a booking came in **through the Lodgit Online Booking System** and you select the DELETE command, you'll first set the booking as "to be deleted". They'll be marked in the schedule with diagonal stripes. During the next synchronisation, the cancellation will be sent to the server (so that it's listed correctly in the online list of your bookings). Only after this synchronisation will it be set to the status "Cancelled Online Booking" and you can delete the booking from the schedule.

If a booking came in **through the Channel Manager**, you can delete the booking quite normally. However, it's important to note that no cancellation notice will be sent to the channel manager, only the vacancies will be updated. If a cancellation notice comes in from the channel manager, you will receive a message in your error log and can manually delete the booking.

Highlight blocked dates in the Lodgit Online system booking calendar

The Lodgit online systems feature four colours as standard:

Grey	Past	Shows the past
Red	Occupied	Indicates whether there is a booking in this period.
Blue	Locked	Indicates an unoccupied but locked period. Locked periods are defined independently of existing bookings in Lodgit Desk via " Administration > Synchronisation and Online Modules > Lodgit > Disabled Time Frames ".
Green	Free	In this period there is neither a booking nor a locked period defined. The rental unit can be booked.
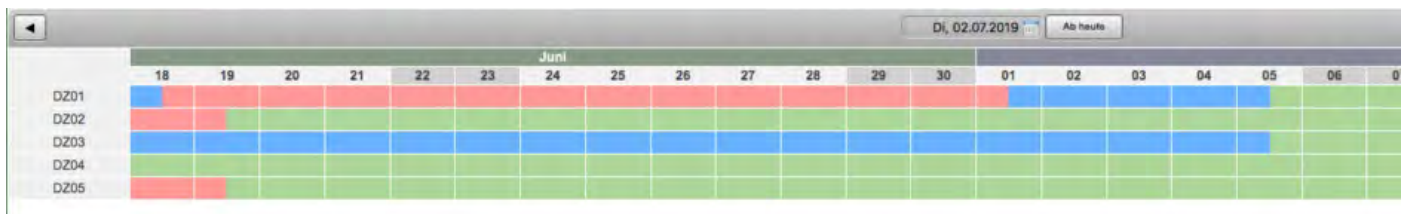
To do this, go to Lodgit Online Systems > Settings > Occupancy Plan in your personal user area (Lodgit.com) and use the URL from the red box. Make sure that the option "Do not highlight blocked periods" is deactivated before copying the URL.

Configuration and URL

The booking calendar for Cabins "Water Lilies" has the following URL:

> https://www.lodgit.com/online-buchen/Y44Q5-6NHQP-27CEC-CGBK8-43DLL-YRCKZ-A6/schedule_map

Options

The booking calendar can be configured using parameters in the URL. Whenever you change an option below, the code examples will be updated accordingly. If a parameter isn't listed in the URL, its default value will be used.

Language:

Not Specified (same as browser)

Forces the Booking Calendar to be displayed in the specified language
Default: »Not Specified (same as browser)«

Gesperrte Zeiträume nicht hervorheben:

Schaltet den Lodgit-CSS-Stil für 'Gesperrte Zeiträume' aus. Diese werden damit im Belegungsplan rot dargestellt.

Example code for embedding the schedule with an iframe

```
<iframe scrolling="no" frameborder="0" id="schedule_map" style="width:1(
   <a href="https://www.lodgit.com/online-buchen/Y44Q5-6NHQP-27CEC-CGBK8-
</iframe>
```

If, on the other hand, you do not want to highlight the blocked periods, check the box "Gesperrte Zeiträume nicht hervorheben" (Do not highlight blocked periods) and then copy the link. The parameter "skip_block_css=1" will be added to the URL. This ensures that blocked periods are still displayed in red in the allocation plan.

> For technical reasons, it is unfortunately not possible to additionally set the colour blue if a channel manager is active at the same time.

> Attention: Wherever you have saved this link so far (e.g. as a bookmark), it must then be changed manually and saved again.

GoBD-export - How do you access the data during a tax audit?

The tax office / the tax auditor receives data access according to Z3 / data export. You can find it in Lodgit Desk under>Administration>Additional modules>GoBD Journal Export. Please enter the desired period to be exported and then your company data. Then specify the storage location for the data. This folder must be readable, writable and erasable.

Then click on the "GoBD" button and the data is exported to the previously defined storage location in accordance with the IDEA standard.

You can then transfer the data for inspection.

Seperate Invoices for one Booking

There are two ways to issue two separate invoices for one booking; these can of course have different payment methods.

Quick and dirty:

Add a deposit of 50% to the booking and issue the deposit invoice to quest no. 1 and the final invoice to the second guest, if this procedure is OK for them.

Proper but elaborate:

1. In principle Lodgit Desk needs two bookings for two separate invoices. The program offers the possibility to draw in bookings on top of each other in the same room. And this is what you have to do.
2. Take one of the bookings for guest no. 1 and the other for guest no. 2 and reduce the price of each booking to 50% (e.g. if the room costs 50,-€/night change the room price to 25€/night).
3. You can select and invoice these bookings individually. You can switch between the bookings when right clicking on the booking in the reservation schedule and selecting „select overbooking".

GoBD-export - How do you access the data during a tax audit?   Up
Display Options for the Occupancy Plan

Display Options for the Occupancy Plan

When you integrate the occupancy plan for an individual rental unit, you have two display options.

First you should make sure that all information required for using the online modules has been entered. The menu item "Missing information" in the left bar of your account must no longer be visible. If it is still displayed, click on it and enter the required data.

Note: Although you cannot receive any bookings through the occupancy plan, you must specify at least one payment type for your own bookings.

Now go to "Settings" and select the rental unit for which you want to display the occupancy plan.

In the upper drop-down menu "Display" you can now select either the occupancy schedule or the occupancy calendar.
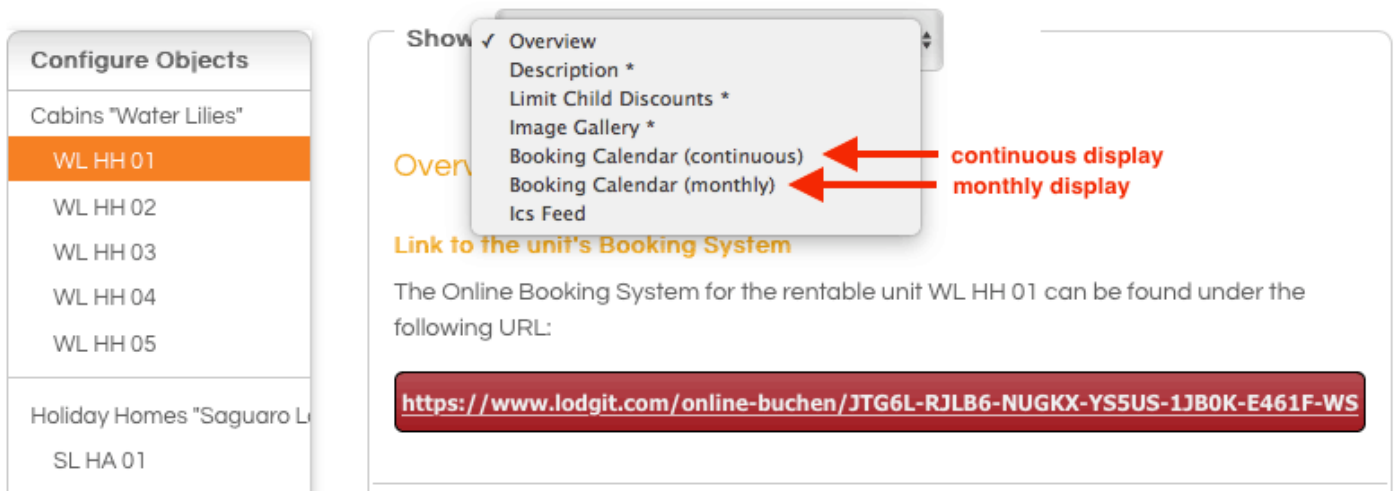
The occupancy plan is a continuous display:
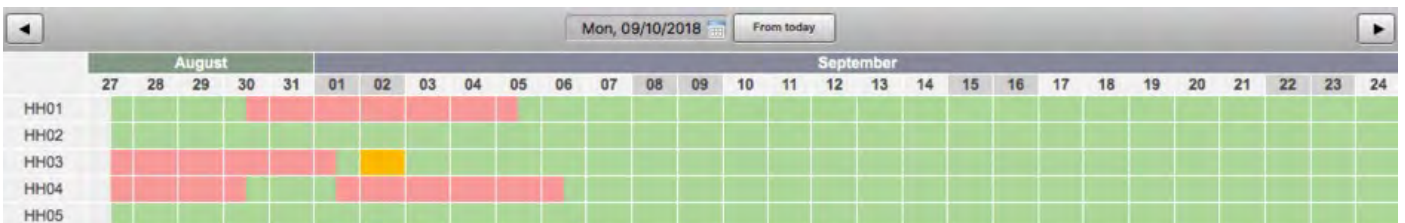
The occupancy calendar displays the occupancy on a monthly basis:

August 2018

Mo	Di	Mi	Do	Fr	Sa	So
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September 2018

Mo	Di	Mi	Do	Fr	Sa	So
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Oktober 2018

Mo	Di	Mi	Do	Fr	Sa	So
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

If you prefer continuous display, select "Availability". Then check the box "Publish occupancy schedule for this rental property" and save this change. A little further down on the page you will find a code snippet that you can use to integrate the layout into your website in an iFrame.

If you would like to have a monthly display, select "Availability calendar". Then check the box "Publish availability calendar for this rental property" and save this change. Here you can also make some settings for the calendar, e.g. how many months should be shown. A little further down on the page you will then find a code snippet that you can use to integrate the occupancy calendar into your website in an iFrame.

SEPERATE INVOICES FOR ONE BOOKING　　　UP　　　COMPLETING AND SETTING THE CASH BOOK TO 0

Completing and setting the cash book to 0

1. Determine the amount of money in your cash register by reading the cash register via Administration> Cash register... and read the current amount from the cash register.
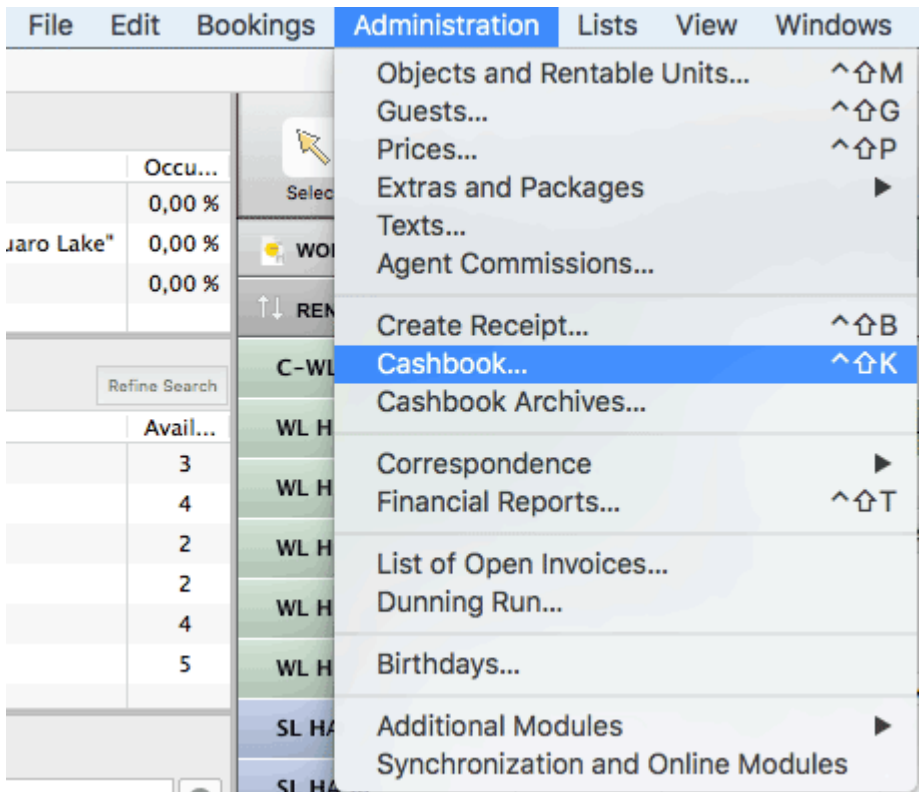
2. Transfer the amount to another accounting account via a private withdrawal or a money transfer to the bank in the cash register...

… and save this transfer.

3. Open the cash journal again and create a financial statement for the current date.

Cashbook (List of Cash Documents)

This list contains all cash payments.

Carryover: $0,00

Date	Time	Recipient/Refere...	Type	No.	Incoming	Outgoing	Balance
27.09.18	15:53:57	Matthew Edwards	Sale (Receipt)	000001	$556,00		$556,00
27.09.18	16:00:35		Cash to Bank	000002		$556,00	$0,00

Cashbook Balance

Enter the date of the cashbook balance.

16:01:22 o'clock   Today (27.09.18)

Print and Save...   Save Now   Cancel

Total: $0,00

Create Receipt   Balance   Close and Open Archives   Close

---

4. You can now either print this financial statement, which has been settled to 0.00, directly or later via the archive (Administration> Archive> Cash book).

Cashbook Archives

In the list below you will find all saved cash balances. Here, you can print these out again.

Month September   Year 2018

From	To	Total
27.09.18 15:53:57	27.09.18 16:01:22	0,00

Preview   Print...

DISPLAY OPTIONS FOR THE OCCUPANCY PLAN   UP
macOS HIGH SIERRA: DO NOT STORE DATABASE IN THE iCLOUD

macOS High Sierra: Do not store database in the iCloud

Problem: When updating macOS to High Sierra (version 10.13), you are offered by default to save the Documents and Desktop folders in the iCloud. As your Lodgit database is no longer located locally on your Mac's hard drive, working with Lodgit Desk can become very slow - especially if your Internet connection is slow. There is also a risk that the synchronisation process will access the database while Lodgit Desk is trying to write, thereby corrupting the database.

Please note: As of Lodgit Desk version 2.1.4, the folder "Lodgit Desk Data" is created by default under >User >Lodgit Desk Data during a new installation.

Solution: The Lodgit Desk database must still be stored locally on your hard drive. To do this, please proceed as follows:

1. Quit Lodgit Desk.

2. Open your *Documents* folder in the Finder (Finder: Go > Documents).

3. Open a second Finder window and go to your *Home* folder. (Finder: File > New Window; Go > Home.

4. Move the Folder "Lodgit Desk Data" from your Documents folder to your Home folder.

5. Start Lodgit Desk.

6. Since your database folder is no longer where it was last, you will be prompted to redefine the database folder
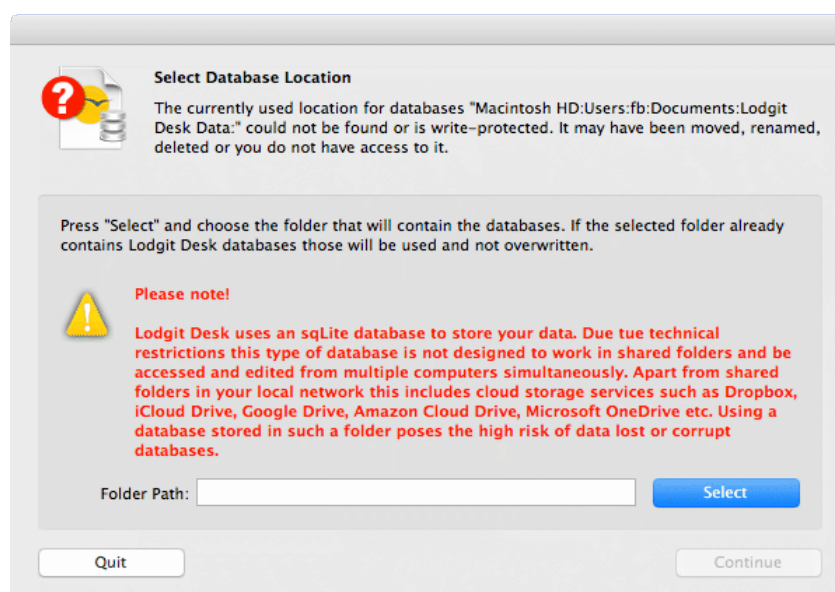
Click the button *Select* and select the "Lodgit Desk Data" folder in your Home folder. Click *Continue*.

7. Lodgit Desk opens as before.

Database server error: Database is locked

"Database Locked" means that the database is blocked by a user (e.g. Lodgit Desk or cubeSQL). This locking serves to avoid data loss and is automatically removed in most cases as soon as the user has finished the respective action; this usually only takes a few seconds.

The following uses may cause the database to display the error "Database is locked" or "Database malformed". These errors are an indicator that the database is corrupted, leading to data loss.

ATTENTION: This error can occur, for example, if...

...an instance of Lodgit Desk is connected to the database file via the database server CubeSQL and another instance of Lodgit Desk accesses the same database file directly.
...at least two different CubeSQL database servers can access the same database file simultaneously.
...at least two different instances of Lodgit Desk can access the same database file directly, without CubeSQL.
...another program accesses the same database file simultaneously or in addition to Lodgit Desk.

The above examples can also cause lead to: Database Malformed

Under certain circumstances, the database may not be automatically released again, even if the action is already complete. In this case, you receive the "Database Locked" error message. You can resolve this error as follows:

Step 1: Close Lodgit Desk on all computers.

Make sure that no other programs access the databases.
Open the cubeSQLAdmin tool and check under "Clients" whether the databases are still accessible.
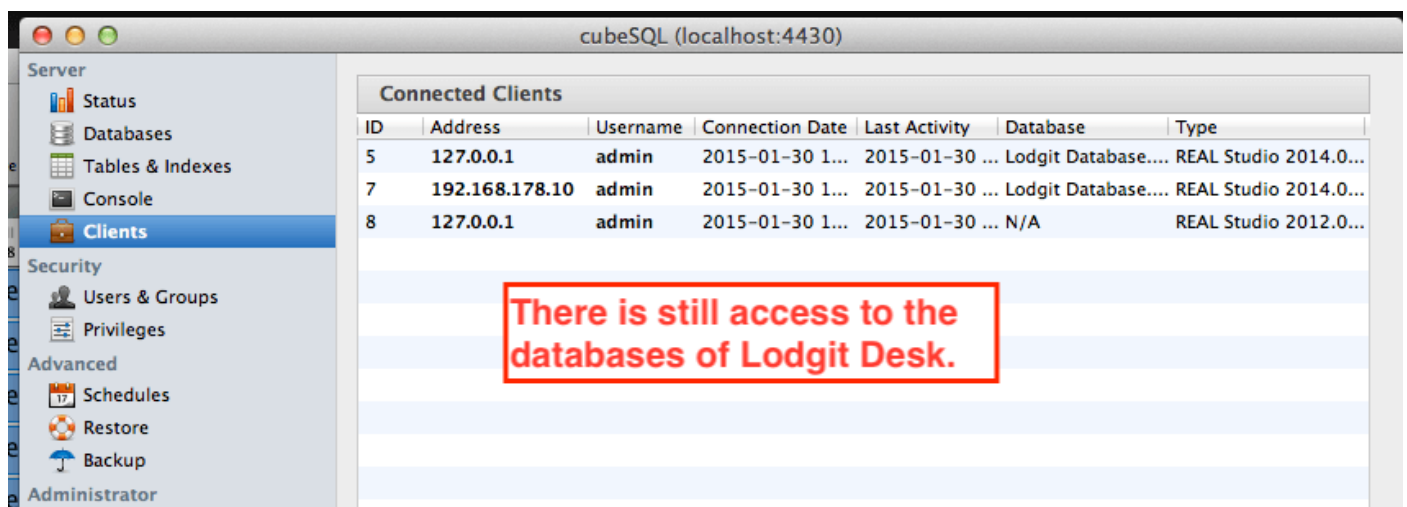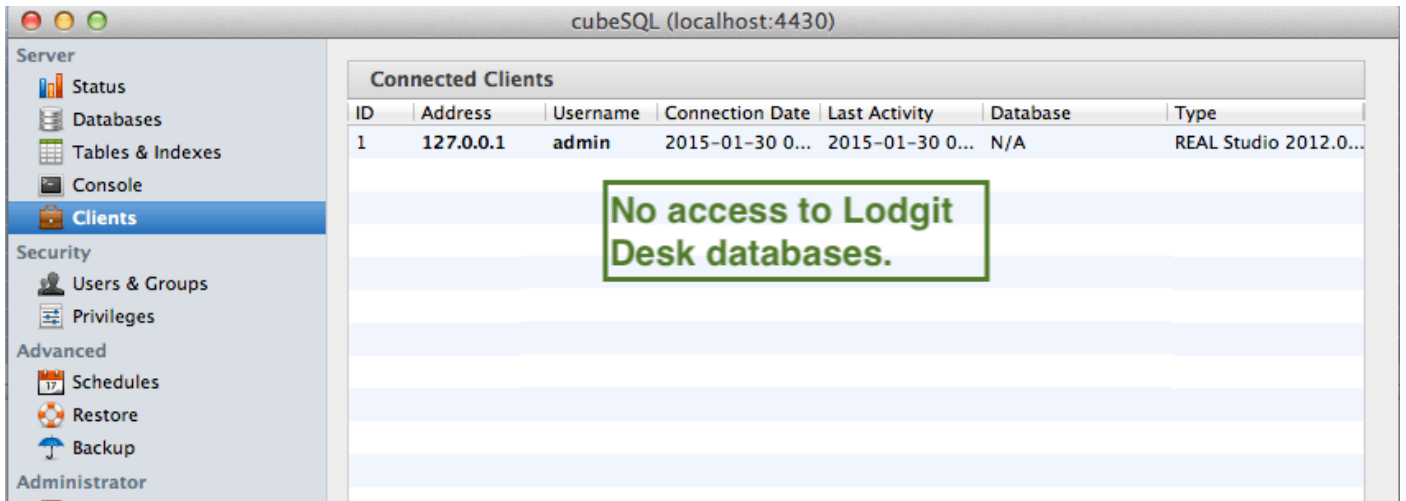
When the database is no longer accessed (lower picture), reopen Lodgit Desk. In most cases this will already solve the problem.
If the problem persists, go to step 2.

Step 2: End the external access to the databases.

Open the cubeSQLAdmin tool and check under "Databases" whether the database is locked by another user. This can be done by virus scanners or backup tools.
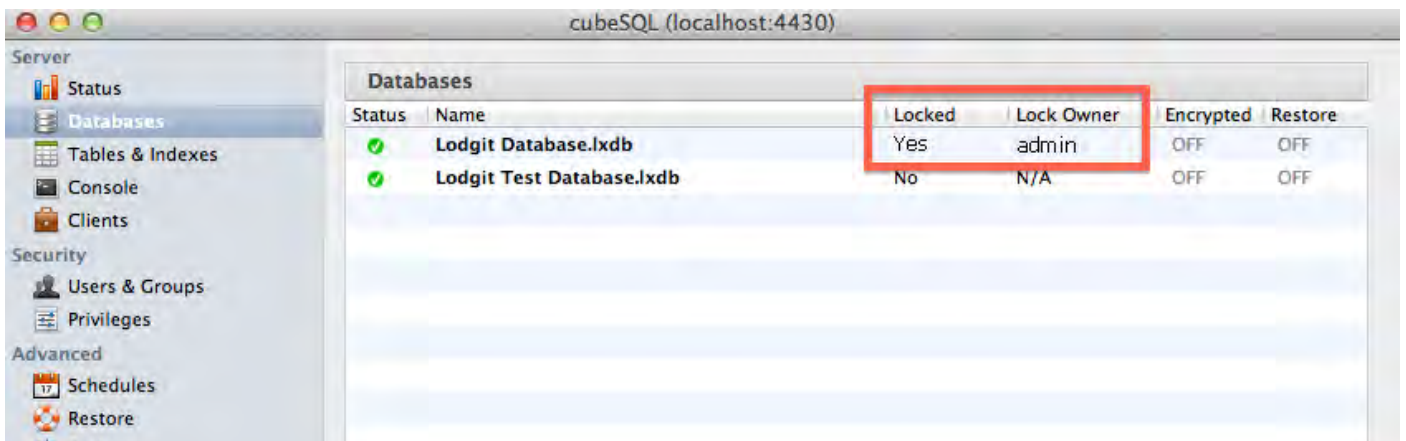
For database backups you should always use the cubeSQL server function. You can find these under "Schedules" in the cubeSQLAdmin (more information in our step-by-step guide).

It is possible that the cubeSQL server locks the databases when creating the backup for security reasons. If the error occurs at a time when you usually make a backup, please wait a few minutes and then check the status of the database again.
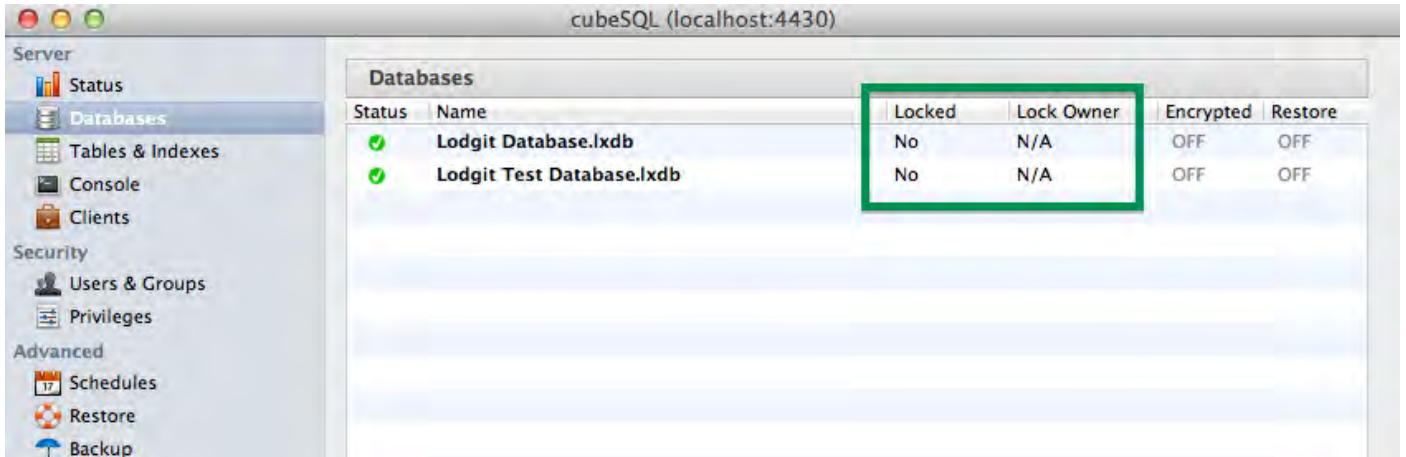
If you still cannot open your Lodgit Desk, go to step 3.

Step 3: Manual unlocking of databases

You can also unlock the database manually with the cubeSQLAdmin tool. First, make sure that Lodgit Desk is shut down on all computers:
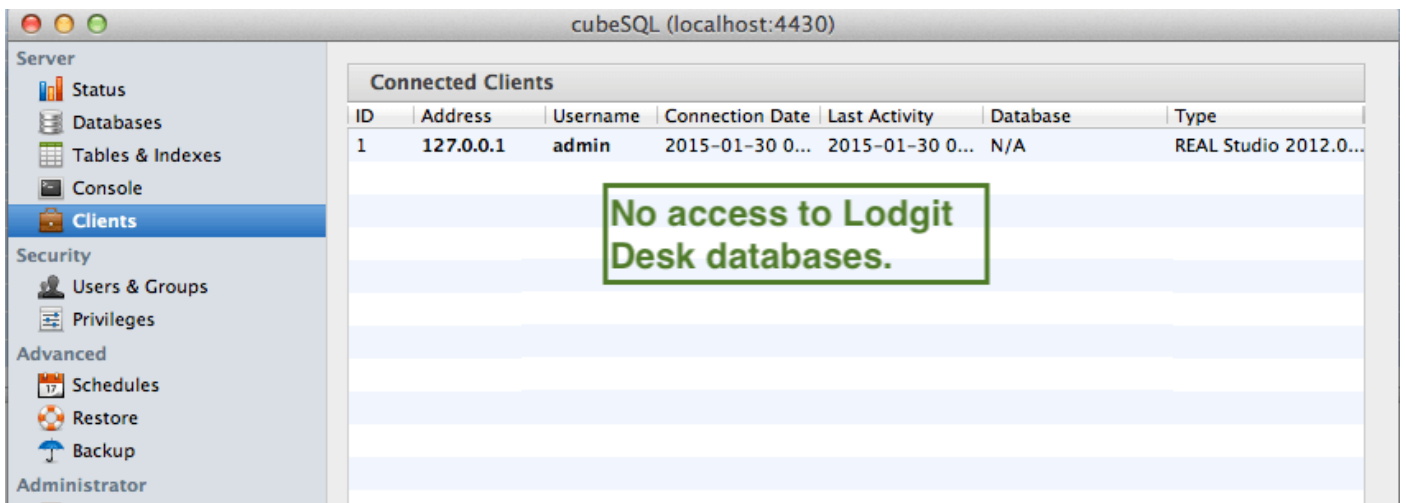
Then go to "Console" and execute the SQL commands "UNLOCK database 'Lodgit Database.lxdb'" and "UNLOCK database 'Lodgit Test Database.lxdb'". **Please pay special attention to upper and lower case!**
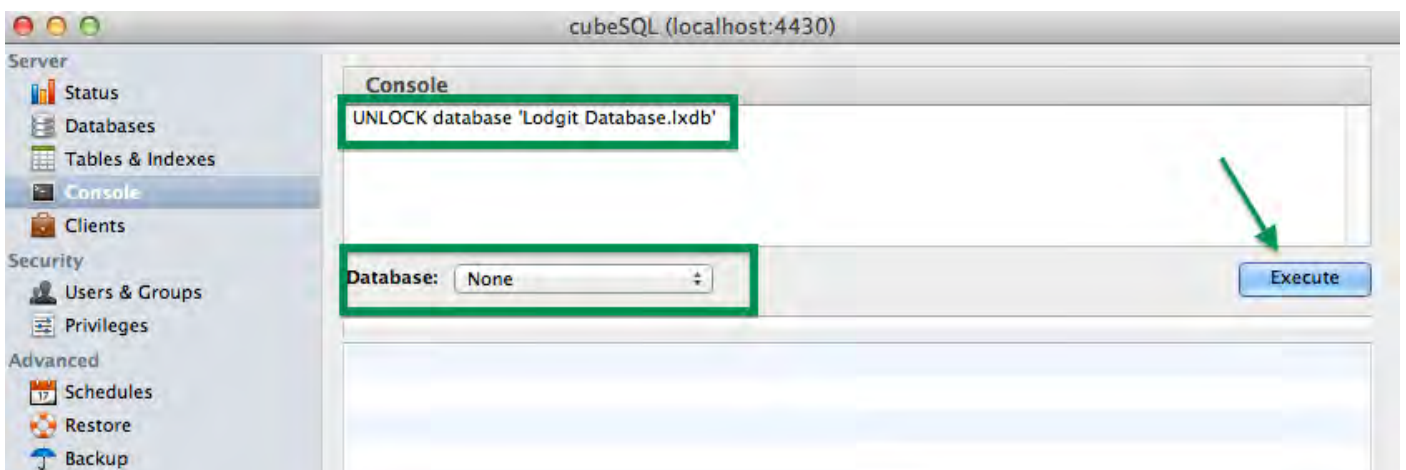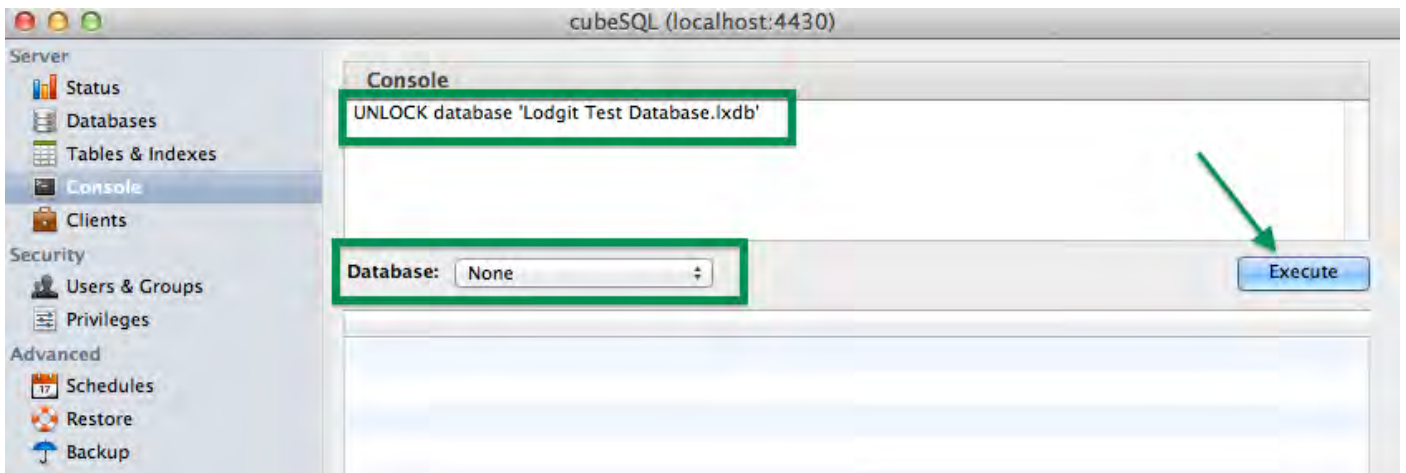
Then open Lodgit Desk. If the problem persists, go to step 4.

Step 4: Restart the cubeSQL server

As in step 3, make sure that Lodgit Desk is closed on all computers and that there is no access to the databases:
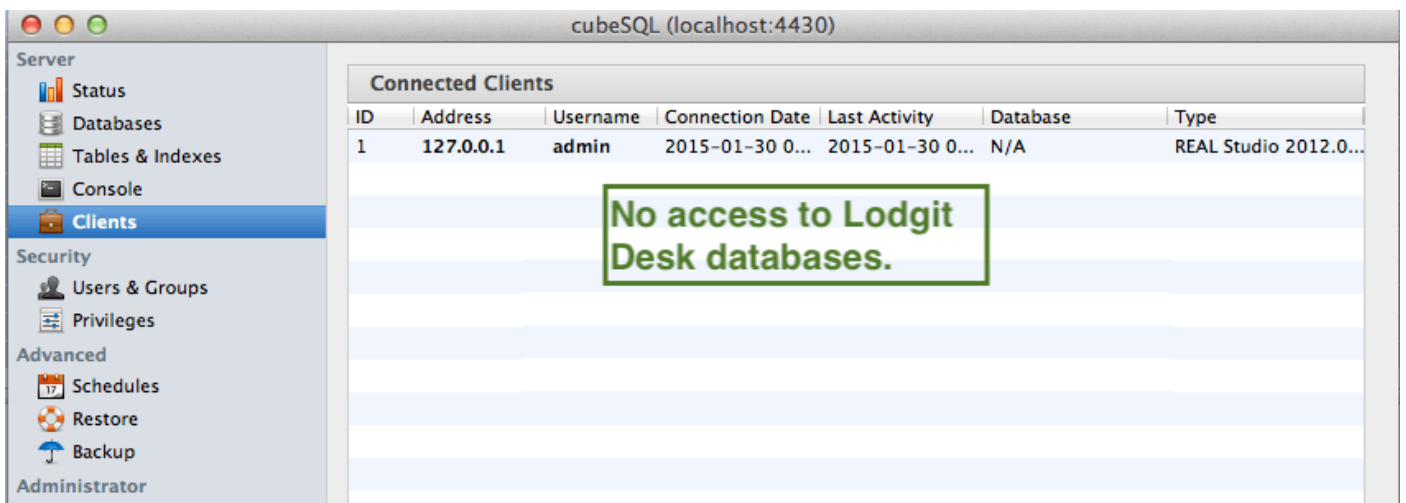
You can then close the cubeSQLAdmin tool and restart the server service. On a Windows system, this is done in the Control Panel under "System and Security> Administration> Services".
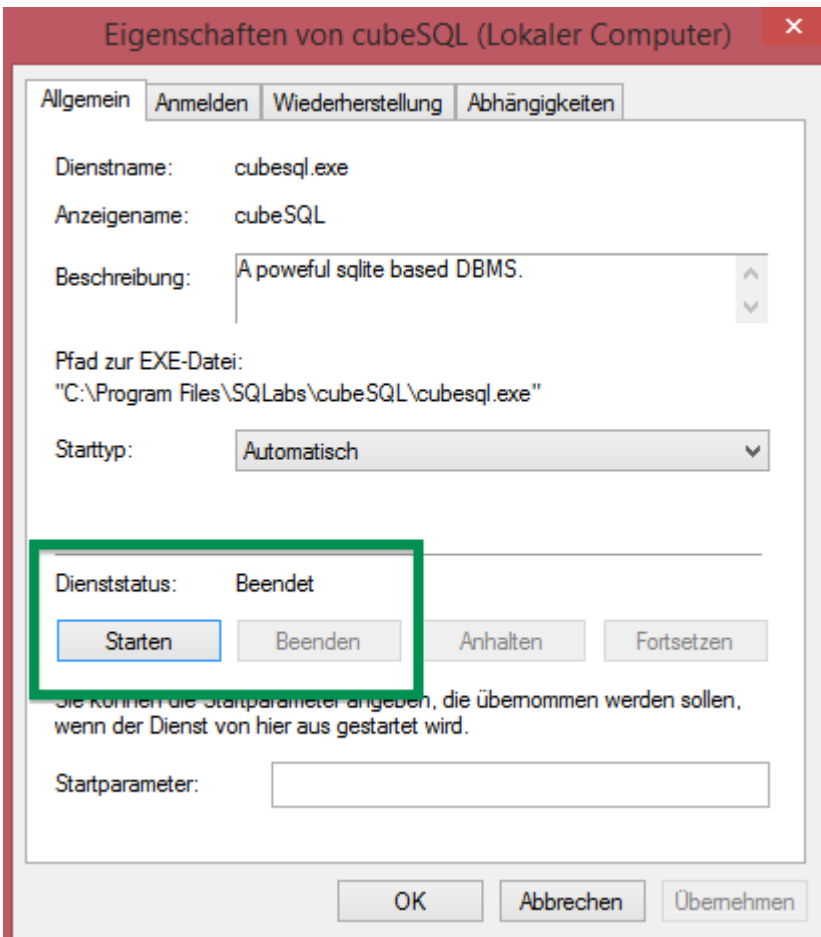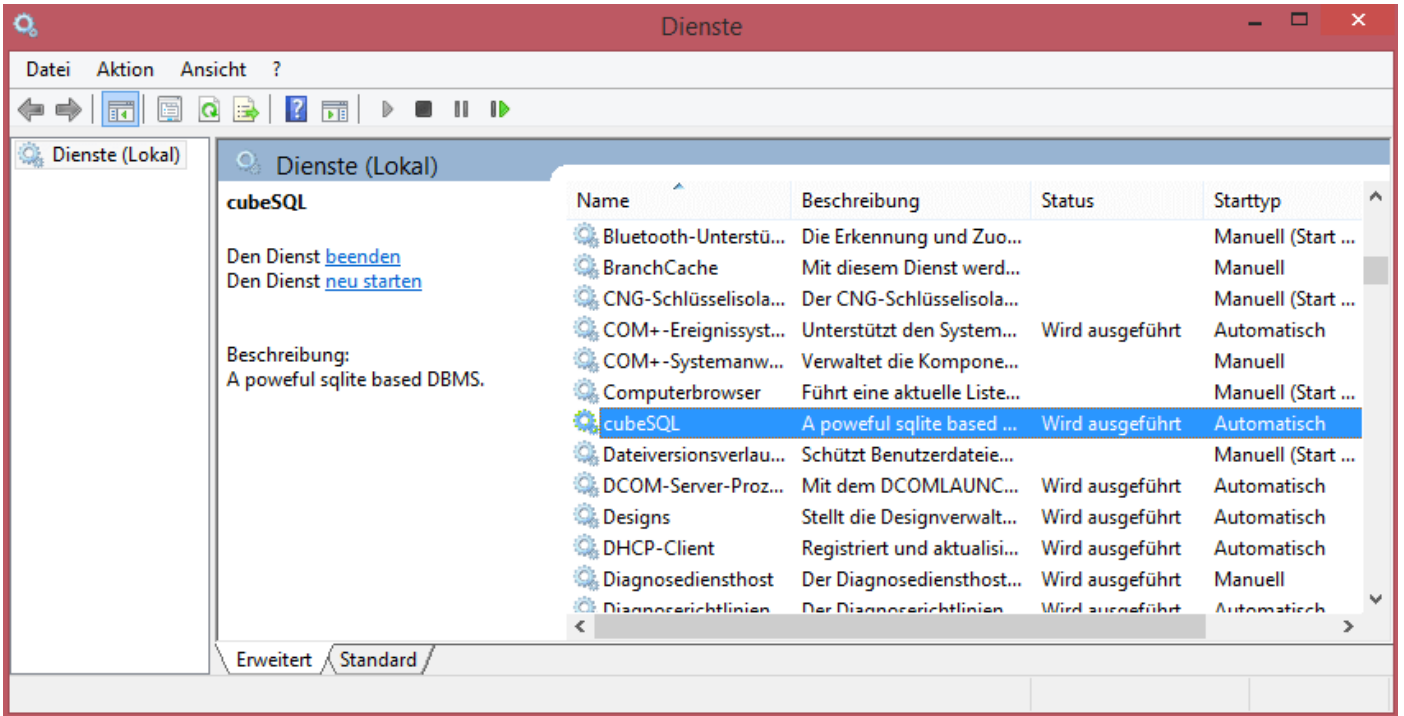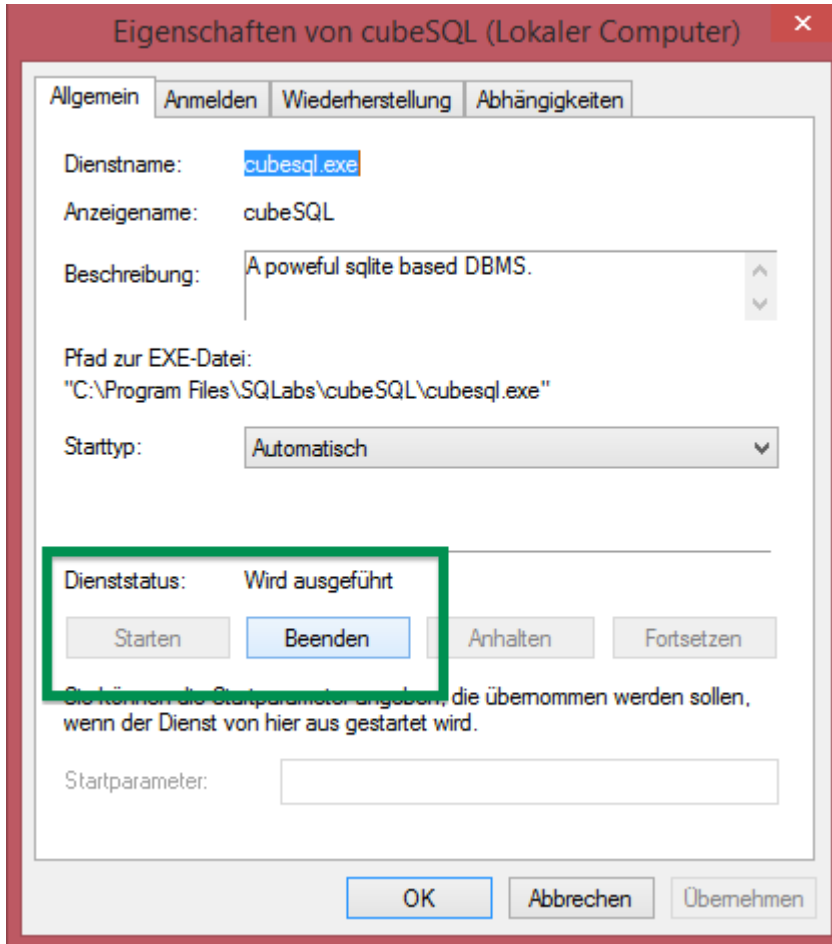
On a Mac system this is done in the system settings under "Miscellaneous> cubeSQL".

If you still cannot open your Lodgit Desk, go to step 5.

Step 5: Restart the computers

If none of the previous steps have been successful, restart all computers on which Lodgit Desk and/or the cubeSQL server is installed.

MACOS HIGH SIERRA: DO NOT STORE DATABASE IN THE ICLOUD   UP
TRANSMITTING PRICES AND LINKING EXTRA ITEMS TO MAPPINGMASTER

Transmitting prices and linking extra items to MappingMaster

Problem

The prices MappingMaster transmits do not match those of the Lodgit price management, although Lodgit sends prices and booking durations to MappingMaster and the extra items are also linked.

Solution

Unit Prices

In principle, Lodgit only transfers **simplified prices** (compared to the Lodgit price management) to MappingMaster, because it is technically impossible to do otherwise. The prices are transmitted in the price table, which is entered under>Administration>Synchronisation and Online modules>MappingMaster>Prices and booking duration for the respective category.
Prices are not transferred directly from the Lodgit price management.

The **default occupancy** of each MappingMaster category is received by Lodgit from MappingMaster.

The **base price** must always be entered manually. This is the price that is taken if no other price is entered in the price table for the respective period.

The prices are ALWAYS per night for the respective rental unit with standard occupancy. A differentiation of the price unit is not possible here (unlike in the Lodgit price management).

However, prices from the Lodgit price management can be imported into the table. Please click on the gear wheel below the list and then click on>Load prices from the price management.

The>Price Comparison window opens. You can choose whether you want to import the>prices for rental units or the>category prices from the Lodgit price management. Then select the rental unit or category whose prices you want to import for the selected MappingMaster category. Prices are imported with the price unit "Per night", which corresponds to the standard occupancy.

You can modify this as below:

You check the box:

- Ignore Standard Occupancy
  ALL prices are loaded independently of the NUMBER OF PERSONS, i.e. with a standard occupancy of 2 persons also those for e.g. 1 or 3 persons, if these are available.
- Ignore Price Unit
  ALL prices are loaded independently of the PRICE UNIT, e.g. also those for 1 week.

> Delete existing price variations of the MappingMaster category "XXX"
> Check this box to prevent double display of identical prices.

The prices in the price table for MappingMaster are interpreted as the price for the standard occupancy per night, regardless of which price unit you had in Lodgit price management and to which number of persons you referred there.

If several prices are entered for an identical time period, the highest price is always used.

Extra Items

Prices for extra items cannot be transferred from Lodgit to MappingMaster, but extra items from a booking via MappingMaster can be linked to extra items from Lodgit.

For example, if you want to offer a room with breakfast, you should create a>product in MappingMaster, where you check the box "with breakfast" and then enter the price you estimate for breakfast as>surcharge. A TOTAL price for room and breakfast (basic price + surcharge) will be transferred.

In Lodgit you have to link the extra item "Breakfast" with the MappingMaster extra item "breakfast". Please make sure that the set price for the extra item "Breakfast" from Lodgit and the price for the surcharge in MappingMaster are the same, otherwise the calculation does not work correctly, see below.

The price for breakfast is usually "per night/person", but the surcharge in MappingMaster is always "per night/room".
If it is possible to occupy different numbers of people per room, such as "double room as single room for 1 person" and "double room for 2 persons", an independent product must be created in MappingMaster for each possible occupancy.

Example

If you have entered a base price of €86 for the room in MappingMaster, the room with breakfast is to be offered and you have entered a surcharge of €7, MappingMaster transfers a total price of €93. If a breakfast price of 7,-€ per night/person is entered in Lodgit, the price of 93,-€ will be interpreted as 86,-€ for the room and 7,-€ for the breakfast. For an occupancy with 2 persons there is a basic price of 79,-€, because 2 * 7,-€ (2 persons with breakfast à 7,-€) = 14,-€ will be deducted from the 93,-€ transferred. This means that you would have had to define a new basic price here in MappingMaster and set up a new product "with breakfast" for this product, for which the surcharge includes the price for breakfast for 2 persons.

Please note: Extra items are ALWAYS treated as a surcharge in Lodgit, which means that they are deducted from the total amount transferred.

Use Lodgit Desk on more than one computer

In the standard version, Lodgit Desk is available only in single user mode. That means all the data is saved locally on your computer and you are responsible for the security of said data. It also means the data is only available on one computer.

There are, however, a couple of options to access Lodgit Desk and your data from different work stations.

Optional additional module "Interface: Database Server"

With the additional module you'll be able to store the database on a virtual server and access it from different workstations. The server will be installed on a computer in your network; it needs very little resources so you can install it on a regular workstation. While the server is designed and tested to work in a local, wired network it is theoretically possible to gain...

Access via VPN or Terminal Server

It is technically feasible to get access to the database server from outside the local network. There are two options:

1. Access via **VPN** (Virtual Private Network) - it works but often rather slowly.
2. Some Lodgit Desk users have installed the database server successfully on a **terminal server**. Thus they have access to their data via the web. Please note: Installation of a terminal server is rather complex and should only be carried out by experienced it experts.

As the performance of both aforementioned configurations depends on the quality (and especially the latency) of the users internet connection we unfortunately can neither guarantee nor offer support for these configurations.

Remote access tools

For accessing Lodgit Desk via the internet, we recommend using a (often free) remote access tool like TeamViewer. This will allow you to access the computer with Lodgit Desk on it remotely. There is no need to install the software on more than one computer.

This method, however, does not allow the simultaneous access of more than one user.

Assign Booking

Issue

The note "Assign Booking" appears in the lower right corner of the reservation schedule;

Solution

A booking that could not be assigned to a rental unit was transferred from the online systems or from the channel manager. Such a booking can be created if a room of the desired category was available for the guest for the entire stay, but not in the same rental unit, so that you either have to reorder the bookings in the corresponding room category or the guest has to move.

Filter the booking list by "Bookings without rental unit". The unassigned bookings are now displayed.

Open these bookings and assign them to a rental unit.

Use Lodgit Desk on more than one computer   Up   Charge cancellation fees

How to charge cancellation fees

Issue

A guest cannot embark on his journey. Since cancellation fees have been agreed, but the accommodation invoice has already been paid, a corrected invoice must be issued. In our example the guest has to pay 90% of the original price, 10% will be refunded.

Solution

1) The paid, original invoice must be cancelled and the corrected invoice sent to the guest, since the accommodation is no longer needed.

2) In addition, you must create a new invoice (preferably both with the same date, e.g. today).

3) Create an extra item for this invoice. You should name this item something meaningful, e.g. with "Cancellation fees for booking XYZ in room ZYX" and rate it with a positive amount representing 90% of the original price.

4) Place the extra item on the new invoice. Send this invoice to the guest as well and pay back the amount equivalent to 10%.

5) The cash balance is correct and the costs have been charged correctly.
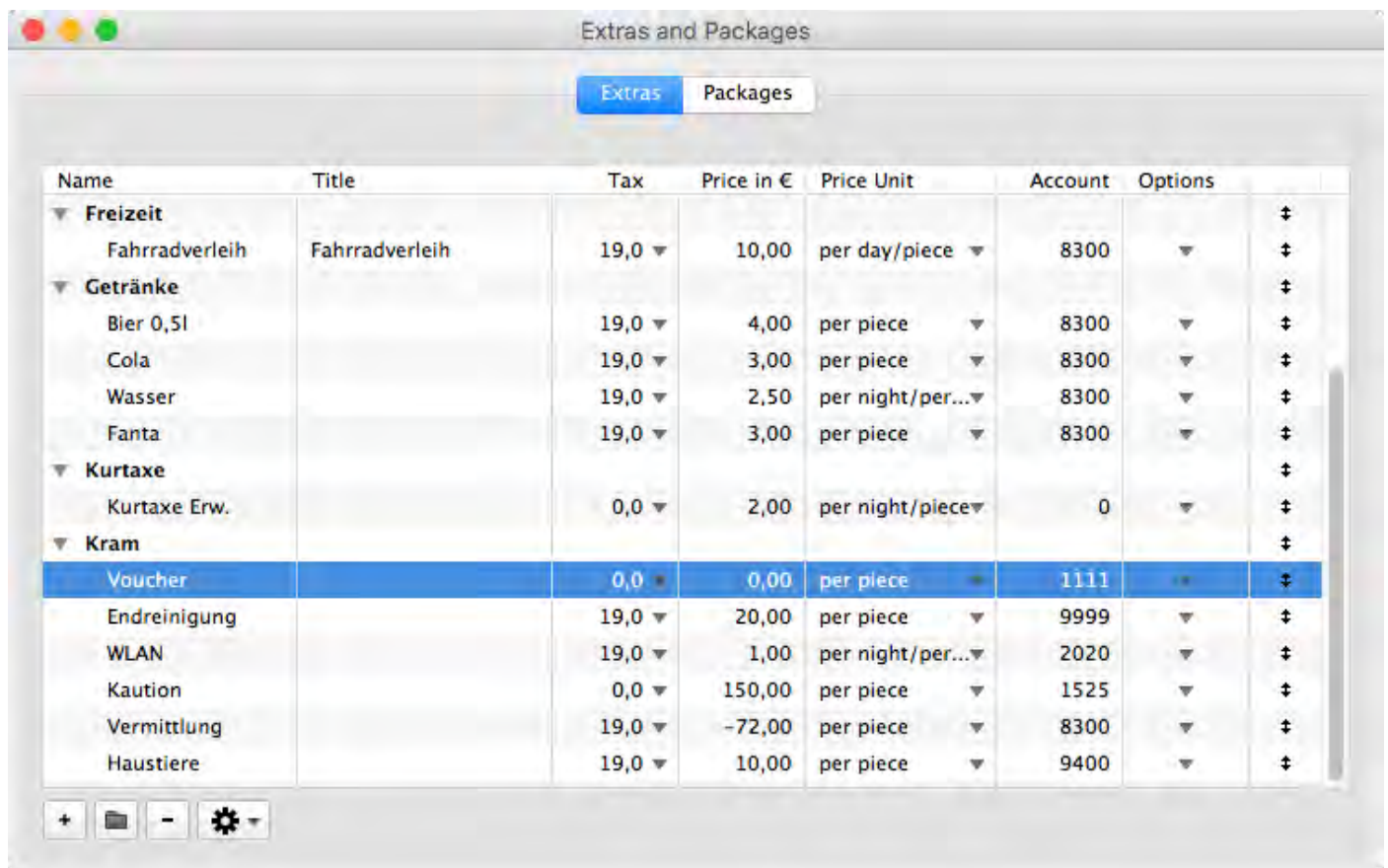
> Tip: Many situations in which refunds or vouchers have to be shown can be solved using extra items. You can create one extra item for each specific case (also with negative amounts).

ASSIGN BOOKING   UP   SELL AND REDEEM VOUCHERS IN LODGIT DESK

Sell and redeem vouchers in Lodgit Desk

You want to issue and/or redeem vouchers for a certain amount of money in Lodgit Desk.

Issue a Voucher

First create an extra item "Voucher" in your extras administration (Administration > Extras & Packages).

If the voucher is paid with cash or credit card you can now create a voucher by creating a receipt (Administration > Create Receipt). If you want to personalise your voucher you can also add an recipient here.

If your voucher will be paid by wire-transfer you need to add the extra item to a booking and create a bill specifically for this extra item. Proceed as follows:

1. Select and open a booking in which the purchaser of the voucher is a guest. If there is no such booking simply draw a new booking in the Reservation Schedule and add the purchaser as the main contact.
2. Add the voucher to the extra items of this booking (Go to: Services > Tab "Extras/Packages" > Click on "Add extra item" > select "Voucher").
3. Edit the voucher so it has the correct price and tax rate.
4. Issue an invoice for the voucher via: Button "Invoice" > only drag "Voucher" into the column "items to be invoiced" > issue the invoice.

5. You might have to alter your invoice texts for the voucher (tab "texts" in the invoice-window). If you issue vouchers on a regular basis you might consider adding a language set "Vouchers" to your Lodgit Desk.
6. If you created a booking in step 1, this can now be deleted since the invoice will still be archived in your invoices and also be associated with the guest in the guest-management.

> In order to follow up on your vouchers it is recommended you keep a list of your vouchers outside Lodgit Desk in a spread sheet (e.g. Excel).

Redeem Voucher

When redeeming an issued voucher, you can either use the same extra item as when issuing a voucher, or create a separate extra item according to the same pattern.

Then add the extra item to the booking and enter the corresponding data (negative value, value-added tax of the voucher). When the invoice is created, the entire booking is then settled normally.

CHARGE CANCELLATION FEES   UP   CREATE COMMENTS AND REMARKS ON INVOICE ITEMS

Create comments and remarks on invoice items

If you want to add a comment to the items of an invoice (and the description of the invoice items themselves is not sufficient for you), you can create an **empty package**, **add it to the booking**, **change the name** if necessary, **ensure that the package name is printed** on invoices and **then include this in the invoice**.

1. First create a new, empty package in the package administration (Administration> Extras and Packages> tab "Packages"> click the + below the package list to create a new package) .
2. Now add this package to a booking (In the booking window > Services > tab "Extras/Packages" > Add package).
   Make sure that "Print Name> On invoices" is checked.

3. Then create the invoice, whereby you also settle the package and drag it to its desired location (i.e. above or below another invoice item) using Drag& Drop.

4. If all settings have been made correctly, the calculation should look something like this:

Highlighting Special Periods in the Occupancy Plan

In Lodgit Desk you can mark special periods, such as holidays or city festivals, by taking advantage of an object/rental unit location.

Version 1: Create a new object with a rental unit and drag it to the top or bottom of the object list. You can use the object colour to delimit this in the occupancy schedule list. This method is suitable if you only have one object, or the selected periods are identical for all objects. This version also does not affect your evaluations within Lodgit Desk, since you can perform all evaluations object-related.

Version 2: Alternatively, you can simply create a new rental unit in an existing object. You can use the abbreviation to place it at the beginning or end of the rental unit list; you can differentiate it from the others by using an individual colour. You can use this version to select object-specific periods and easily show and hide them together with the object. However, you should bear in mind that this version may affect your evaluations and analyses, since this rental unit is considered part of your object.

No matter which version you choose, you should now have created a rental unit for your periods. In this rental unit, you now create bookings for the duration of these special periods. With the help of the booking label "Individual text" you can explain the period in more detail.

Tip 1: Choose a booking status that you do not otherwise use, or only rarely use, to distinguish these periodic bookings from the normal bookings. Note also that the booking statuses Tentative, Locked and Cancelled Online Booking do not require a main contact.

Tip 2: Use the booking labels to indicate the type of periods (e.g. holidays, city festivals or trade fairs).

Invoice with Company Address but Registration Form with Guest Address

A guest arrives and wants the invoice to be sent to the company address. The registration form, on the other hand, should have her private address.

To settle the booking in this way, two guests must be created in the guest administration:

1. The guest with her private address
2. The company with the company address

A new booking is then created. The company is added as the main contact (make sure that the box "Is guest herself" is NOT selected), the guest herself is added under Guests.

When you create the registration form, you select the guest as a person and her private address appears on the registration form.

When the invoice is created, it's sent by default to the main contact, i.e. the company. In the "Options" tab in the drop-down menu "Print options" in the invoice window, select "Print guest names" to include the guest's name in the invoice.

Email attachments will be sent to the recipient as 'winmail.dat'

Issue

In some cases it can happen that sent e-mail attachments do not arrive in the intended file format (e.g. .pdf), but reach the recipient as 'winmail.dat'. This occurs when sending via the mail program Outlook.

Solution

Please configure your email preferences. Please pay particular attention to the settings for using the MAPI interface with Microsoft Outlook 2013.

Change Language of Lodgit Desk

Normally, Lodgit Desk is displayed in the language selected as the system language on your computer, i.e. in German or Spanish, if this is your default language, and in English for any other language.

In Lodgit Desk, however, you can work in German, Spanish, or English, regardless of your system language.

Mac

You can use the Language Switcher app to change the language of selected programs. Once you have opened the app, select Lodgit Desk and then select German, Spanish or English, depending on which language you want to work in Lodgit Desk.
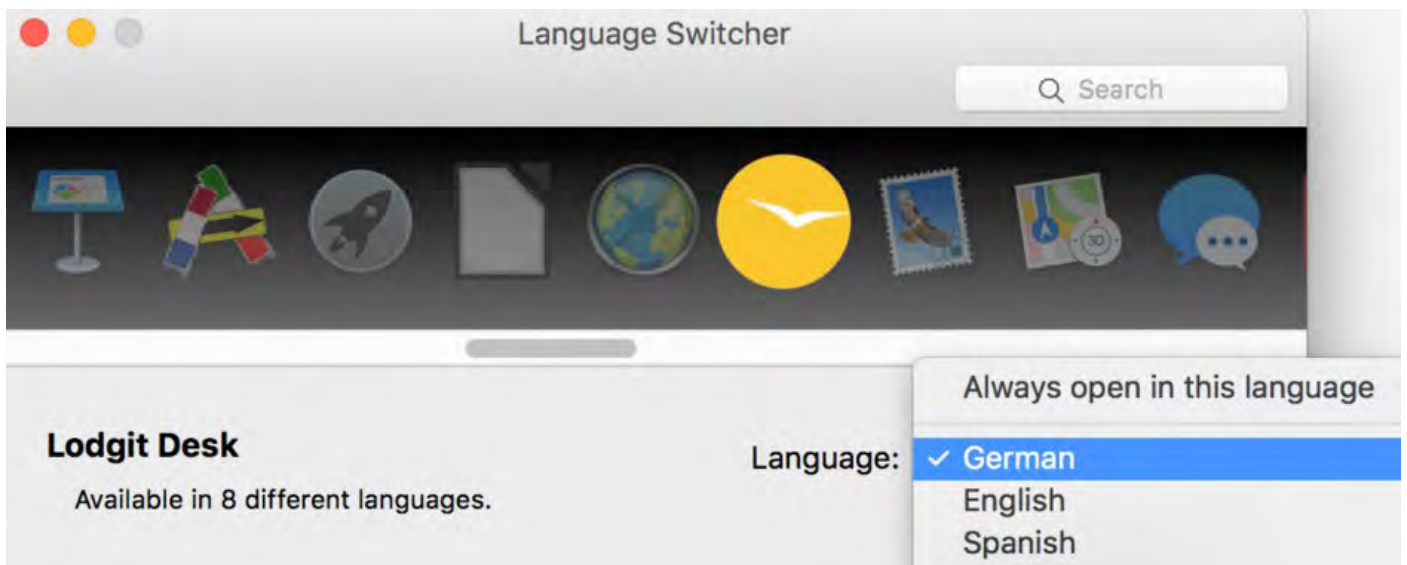
Windows 10

Under Windows 10, the language in which Lodgit Desk is displayed depends on the language of the operating system - the ability to set different languages for the windows of different programs seems to have been removed by an update.

You can change the language of your Windows 10 installation by following these instructions.

ATTACHMENTS SENT BY MAIL WILL BE SENT TO THE RECIPIENT AS 'WINMAIL.DAT'   UP
CUBESQL: DISCONNECTED / SWITCH BACK TO LOCAL DATABASE

cubeSQL: Disconnected / switch back to local database

If you last ran Lodgit Desk in database server or multi-user mode and the database server should be unreachable, Lodgit can only be reset to local mode for security reasons by explicitly deleting the program's settings file.

This is to prevent accidentally working in different databases or downloading online bookings to the wrong database.

If you still want to continue working with a local version of the database, proceed as follows, depending on your operating system:

macOS

First, close Lodgit Desk. Then open a Finder window and click "Go" in the menu bar at the top of the screen. Now hold down the alt or option key. The item "Library" will then appear in the menu and you can click on it.
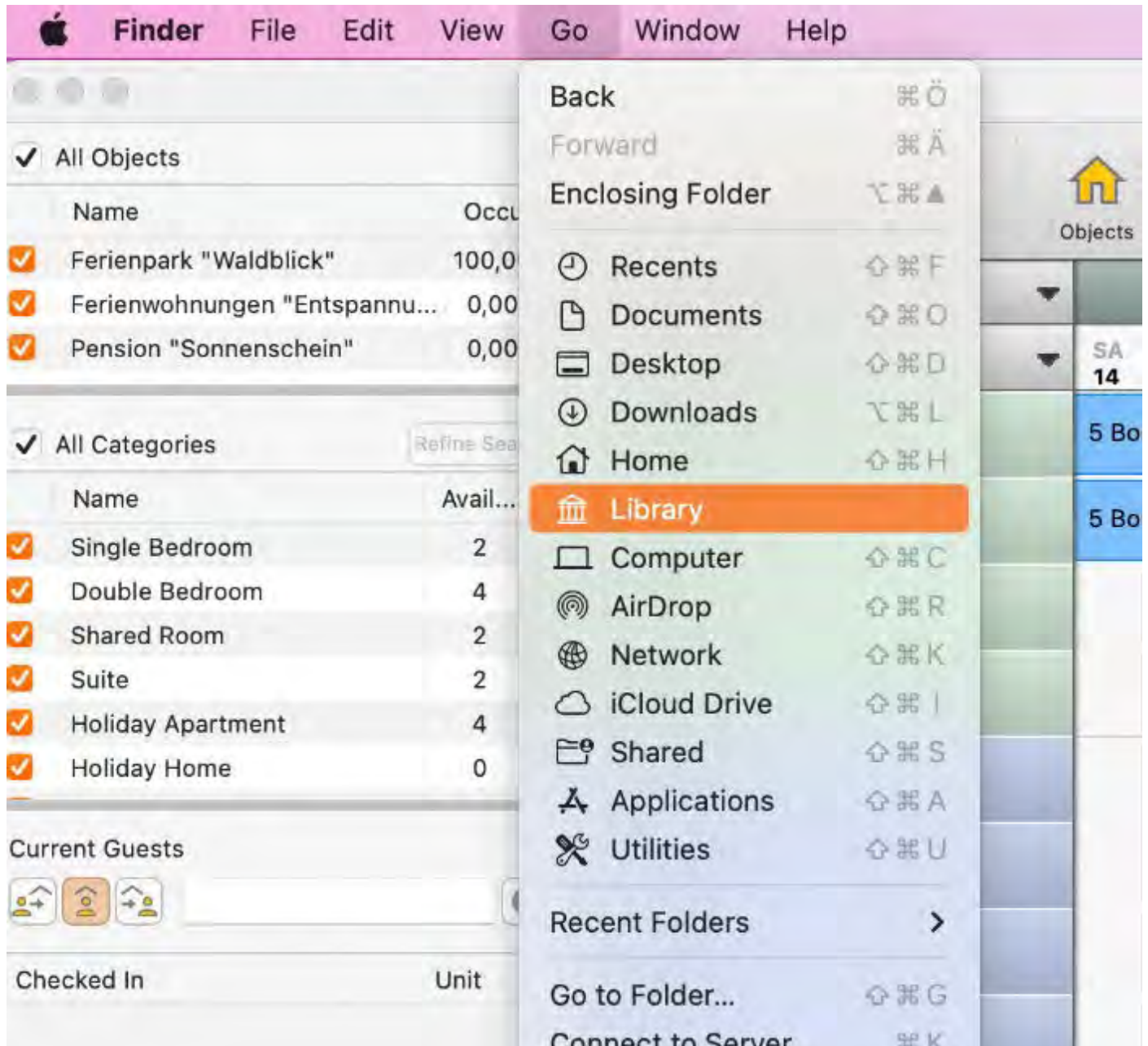
In the library you will find a subfolder called "Preferences". Double click to open it.
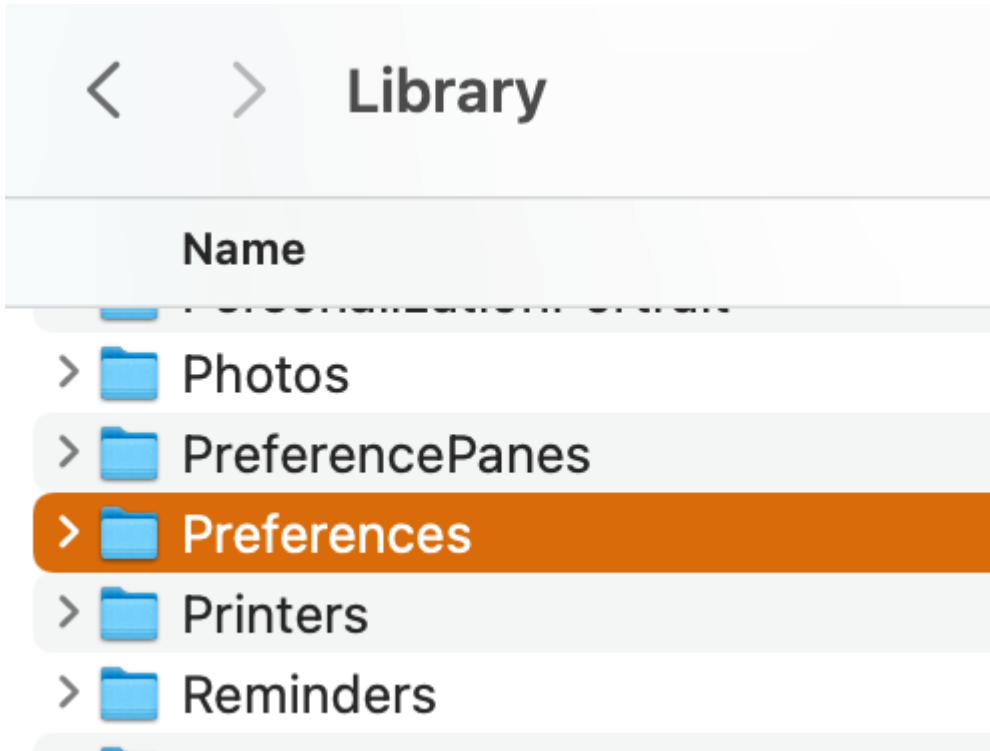
In the subfolder "Library/Preferences" you will find a file "de.lodgit.lodgitdesk.plist".

Make sure that Lodgit Desk is closed on your computer.

If you delete this file, Lodgit will reset to factory defaults and reconnect to the local database the next time you start it.
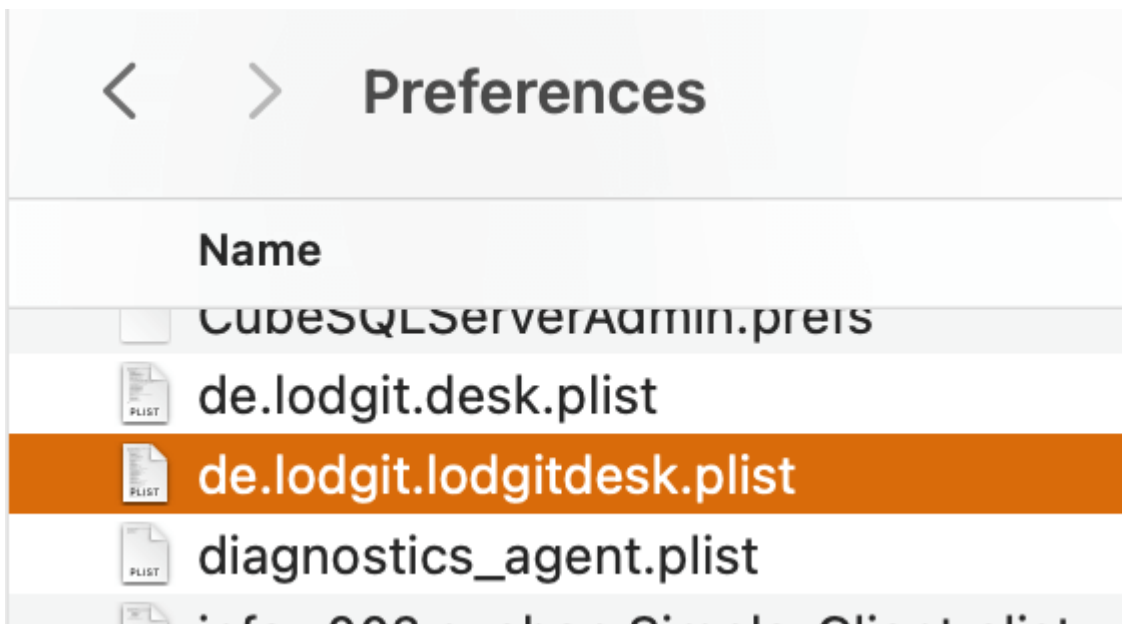
Windows

First close Lodgit Desk. Then click on the start menu icon and search for

%APPDATA%. A folder with this name should show up in the search results. Click on it to open it.
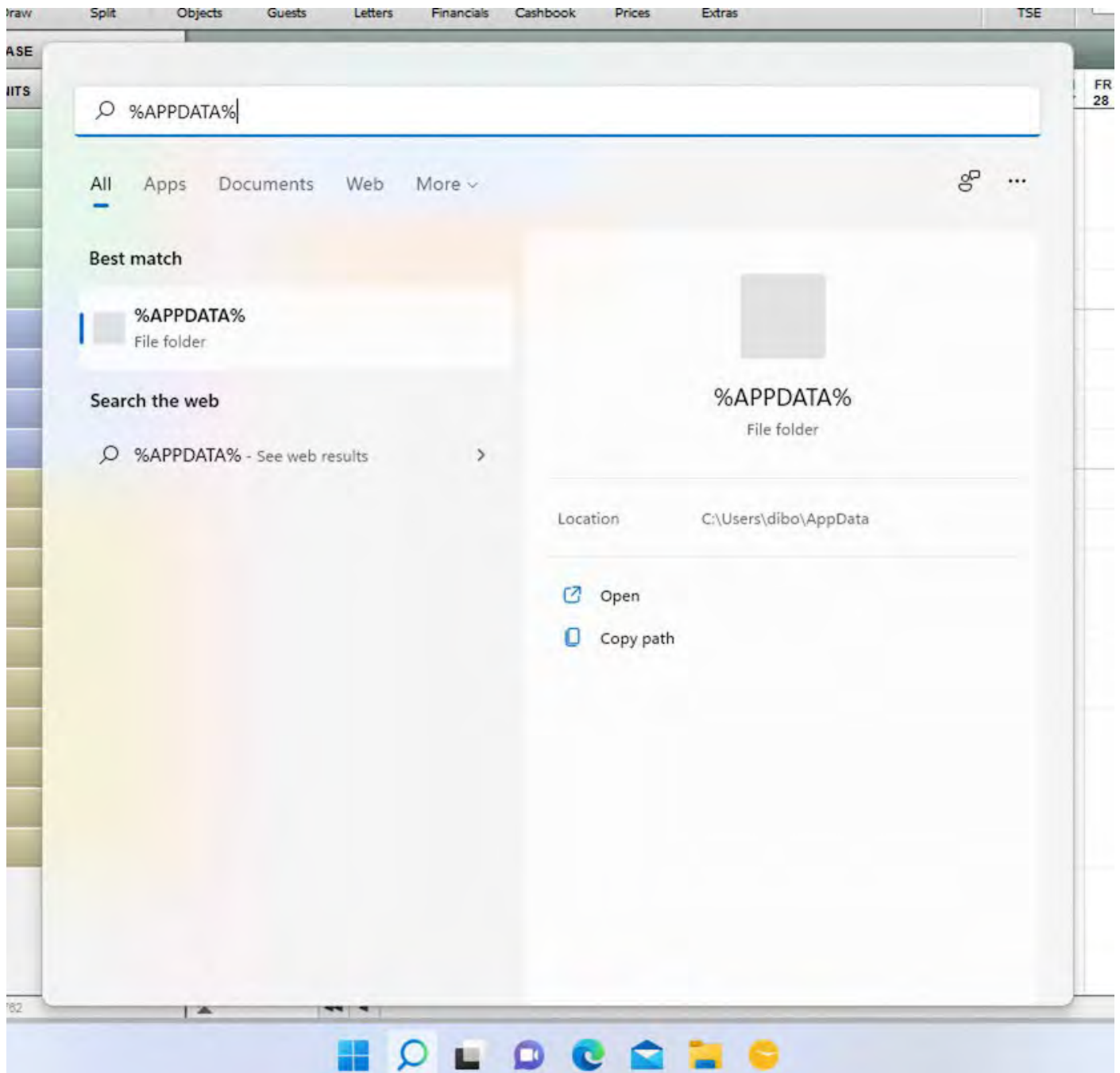
In %APPDATA% you should be able to find - amongst others - a subfolder called "Lodgit".

Name

Adobe

AmadeusVerify

CEFCache

Lodgit

Microsoft

Mozilla

ProSaldo

The Lodgit subfolder contains the file "de.lodgit.lodgitdesk.plist".

Make sure that Lodgit is closed and then delete this file to reset Lodgit Desk to factory defaults and local mode.

Name	Änderungsdatum	Typ	Größe
de.lodgit.lodgitdesk.plist	11.05.2022 02:39	PLIST-Datei	11 KB

CHANGE LANGUAGE OF LODGIT DESK   UP   SHORTCUTS

Shortcuts

Below you'll find a list of key combinations that can make working with Lodgit Desk easier and faster.

Key:

Shift key	⇑
Delete	⇒
Backspace	⇐
Ctrl key	∧
Command key / Apple key	CMD
Enter key / return key	↵

Action	Windows	Mac OS X
Open the Help file	F1	Help
Open the Preferences	∧ ,	CMD ,
Quit software	∧ Q	CMD Q
Open database folder	∧ ⇑ O	CMD ⇑ O
Save reservation schedule as image	∧ S	CMD S
Print reservation schedule	∧ P	CMD P
Main window: hide or show sidebar	∧ L	CMD L
Main window: hide or show booking list	∧ ⇑ L	CMD ⇑ L
Use "Select" mode (reservation schedule)	a	a
Use "Draw" mode (reservation schedule)	e	e
Use "Split" mode (reservation schedule)	t	t
Use the next mode („Select" → „Draw" → „Split" → „Select")in the reservation schedule	Space Bar	
Create new booking (reservation schedule)	∧ N	CMD N
Duplicate selected booking (reservation schedule)	∧ D	CMD D
Open selected booking (reservation schedule)	∧ O or ↵	CMD O or ↵
Delete selected booking (reservation schedule)	⇐ or ⇒	
Reservation schedule: center current date	∧ T	CMD T
Go to a certain date in the reservation schedule	∧ G	CMD G
Reservation schedule: next month	∧ →	CMD →
Reservation schedule: previous month	∧ ←	CMD ←
Reservation schedule: next year	∧ ⇑ →	⇑ CMD →

Reservation schedule: previous year	∧ ⇑ ←	⇑ CMD ←
Select several bookings in the reservation schedule	Hold down ⇑-key and then click on the bookings you want to select	
Open Object Management	⇑ Alt M	∧ ⇑ M
Open Guest Management	⇑ Alt G	∧ ⇑ G
Open Price Administration	⇑ Alt P	∧ ⇑ P
Open Lodging Statistics	⇑ Alt S	∧ ⇑ S
Open Check In List	⇑ Alt I	∧ ⇑ I
Open Check Out List	⇑ Alt O	∧ ⇑ O
Open List of E-Registration Forms	⇑ Alt R	∧ ⇑ R
Open Extras List	⇑ Alt E	∧ ⇑ E
Open Cleaning List	⇑ Alt C	∧ ⇑ C
Open Offer Arches (Correspondence)	⇑ Alt A	∧ ⇑ A
Open Extras Management	⇑ Alt X	∧ ⇑ X
Open Package Management	⇑ Alt Z	∧ ⇑ Z
Open Cashbook	⇑ Alt K	∧ ⇑ K
Open Financial Reports	⇑ Alt T	∧ ⇑ T
Duplicate selected prices (Price Administration)	∧ D	∧ D
Duplicate selected prices and add a year (Price Administration)	∧ ⇑ D	∧ ⇑ D
Delete the selected cashbook entry (no invoices)	⇐ or ⇒	
Go to search area in the booking list (reservation schedule)	∧ F	CMD F
Go to search area (Guest Management)	∧ F	CMD F
Fix booking or remove fixation	⇑ CTRL F	⇑ CMD F

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SHORTCUTS   UP