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## **Data Conversion from Guest Tracker to RezOvation**

### **Overview**

Our Conversion Wizard, accessed through **Start->All Programs->RezOvation -> RezOvation Conversion Wizard**, can convert existing Guest Tracker data into the RezOvation program without harming or deleting any Guest Tracker data. Once the conversion has taken place, the data is not deleted from the Guest Tracker program, so any information that is not converted will still be accessible in the Guest Tracker program. An extensive list of what is and is not transferred in the conversion can be found in this document.

It is important to note that some information is not transferred and so must be configured in RezOvation after the conversion. Namely this information includes rates, letters, and program configuration options, such as display options, etc.

### **Strategies for a Smooth Transition from Guest Tracker to RezOvation**

The following are a few suggestions for making your transition from Guest Tracker to RezOvation a smooth one.

1. Convert your data into RezOvation and enter the actual data into both the RezOvation and Guest Tracker programs simultaneously. While this may seem redundant, this is probably the best option because it familiarizes you with RezOvation, while keeping your data intact on both a familiar and an unfamiliar system.
2. Convert data from Guest Tracker and then immediately stop using the Guest Tracker program. Start using RezOvation immediately after it is setup.
3. Do an initial conversion from Guest Tracker to RezOvation for testing/learning purposes *only*, entering dummy data into RezOvation. When you are familiar with RezOvation, do a second, final conversion.

4. Use the demo database for testing/learning purposes only, entering dummy data into RezOvation to familiarize you with the program. Once you feel comfortable, you can undertake a full data conversion and begin using RezOvation exclusively.

**NOTE!** If you choose option 3 or 4, then you should only enter Unit Rate configuration information into RezOvation Desktop. All other configuration information, guest information, and reservation information will be wiped out when you run the conversion again.

## What Data Gets Converted?

The following is a list of all of the information that is easily converted to RezOvation.

- **Units**, including associated descriptions, capacities, names, etc.
- **Reservations**, including split reservations. (Group reservations are converted, but there are some issues with this process.)
- **Contact information**, including associated addresses, phone numbers, email addresses, and credit card numbers.
- **Payments**, deposits, and refunds
- **Tax names**
- **All notes** fields
- All **custom** fields (some fields will be transferred to Notes fields in RezOvation).
- **Guest Tracker Revenue Accounts** (i.e. accounts used for items that are NOT considered lodging can be found under Point of Sale in RezOvation after the conversion)
- **Charge items** (point of sale items)
- All **rates attached to existing reservations**
- **Customer Interests**
- **Sources of Contact**
- **Web module settings**

## What Data Does Not Get Converted?

Some information simply cannot be converted from Guest Tracker to RezOvation due to compatibility differences between the programs. The following is a list of the information that is **not** converted from Guest Tracker to RezOvation. Remember that this information is not lost; it simply needs to be added to RezOvation during configuration.

- Guest Tracker **seasonal rates**
- **Letters and reports**
- The list of **Guest Tracker Package Prices** (this information must be entered into the Unit Rate Plan section of RezOvation).
- The Guest Tracker **Wait List**
- **“Out of service” entries** in your occupancy map.
- **Cash sales** (sales entered using the “Cash Sales” function in Guest Tracker). Cash sales should always be reconciled prior to the conversion process. If you need reports relating to cash sales entered in Guest Tracker, then you should generate these reports in Guest Tracker.
- **Correspondence items** from the People or Reservations screens.

## Converting Data from Guest Tracker to RezOvation

You are now ready to convert your data from guest Tracker into RezOvation. Please read the instructions first, and begin the conversion once you are comfortable with the guidance. As with any process, remember to follow every step, as skipping steps may lead to a rough transition and the loss of data.

1. Download the free RezOvation Demo from our web site or request a CD.
2. Determine revenue accounts used for lodging in GT. This information can be found in Guest Tracker by going to Admin->Revenue Accounts. *This step is very important.*
3. If you used Gift Certificates in Guest Tracker, then you should confirm that all GCs have a “purchaser” name attached. GCs without a purchaser *will not be transferred.*
4. Run all three Guest Tracker Database Utilities (Verify, Compact and Analyze) to eliminate any possible corruption in the Guest Tracker database before the conversion. Most Guest Tracker users are familiar with doing this and this utility can be found by going to Start->All Programs->Guest Tracker > Database Utilities. Pay close attention to the errors / warnings that may appear during the Analyze process. Items such as reservations with no contact information, reservations with no unit assignment, and “zero night” reservations should be corrected before converting to RezOvation.
5. Determine the location of the Guest Tracker database. Within Guest Tracker, select File > Database Info. Write down the information you see here, e.g. “C:\Tracker”.
6. Close both Guest Tracker and RezOvation before starting the conversion. This step is very important. Note: your Guest Tracker data will not be affected in any way by the conversion.
7. From your computer’s start menu go to Start->All Programs-> RezOvation-> RezOvation Conversion Wizard, and click Next.
8. If you are using Guest Tracker on a network, you may need to change the path to the data file. At the prompt “Select the path to the data file”, change the database path to the path noted in step 4. Click “Next”, then click “Do Conversion”.
9. You will be prompted with a message “Purge Unit Rates”? You should choose “Yes” unless you have already set up rates in RezOvation. You will need the revenue information from step 2. Click Next.

10. When prompted, enter your tax rates.
11. When prompted, enter your property information.

At the Select Lodging Revenue Accounts dialog, select the first account that is used for lodging revenue (as established in Step 2), and click on the >>> arrows to move the account name to the right. Repeat for each account that is used for lodging revenue, and then click Continue.

## **NOTES ABOUT REVENUE ACCOUNTS**

**The revenue selection is very important and should be carefully considered before converting your data from Guest Tracker to RezOvation.**

Because Guest Tracker did not require that you assign a rate to a unit, it is possible to have discrepancies in terms of unit revenue. While there is no simple solution for this issue when converting to RezOvation, we have provided the Revenue selection dialog in order to help you more accurately convert your revenue information.

It is very important that you determine what revenue accounts you used in Guest Tracker strictly for lodging revenue. This information can be found in Guest Tracker by going to Admin->Revenue Accounts. Once you have determined which accounts are used for lodging, select those accounts from the left hand side of the revenue dialog, and click the arrow (>>) button. Repeat for all accounts used strictly for lodging revenue.

Note! If you select an account that included point of sale revenue (sometimes known as "cash sales") then please be aware that your unit revenue numbers in RezOvation may not be accurate. Your total income will always be correct in RezOvation, and all of your reservations will have the correct charges, payments, etc. In some cases the "Unit Revenue" report will appear inaccurate after the conversion. In this case it is best to pull historical unit revenue information from Guest Tracker.

12. Once the conversion has completed, open RezOvation and create new individual taxes, tax class groups, and unit rates before making any new reservations.
13. **For information about setting up RezOvation, please see the setup guide on our web site at [www.rezovation.com](http://www.rezovation.com).** Navigate to Documentation and select RezOvation. You can also use the help file within the program by selecting Help > Help.
14. To move letters from Guest Tracker to RezOvation, please do the following:

- a. Open Guest Tracker and navigate to Reports > Form Letters (only Letters are easily transferable).
- b. Select Edit > Select All, then Edit > Copy.
- c. Open RezOvation and navigate to Tools > Letter Design. Select the appropriate Style and Category (e.g. Style = Standard, Category = No Payment for a confirmation letter when the guest has not paid a deposit), or select Single No Style if you do not wish to define letters by “style”.
- d. Select Edit > Paste.
- e. Change any database codes (displayed between < >, e.g. <NAME>) to use the codes in RezOvation. Since the codes in Guest Tracker and RezOvation are different, the GT codes will no longer function. You can use the CODES menu at the top center of the screen to view and select from all available codes.