Newsletter #18 (Dec 7, 2005)

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What's New

Custom report examples wanted

As many of you know, the next major release of Campground Master will allow you to create custom reports and forms.

More specifically, it will use a powerful "expression" calculator that can be used in a variety of places. You'll be able to create your own list-type reports like the On Site tab view, and cross-table reports like the Transaction summary reports. Creating these reports will be similar to designing queries in MS Access or creating formulas in MS Excel, with full access to database fields and a wide variety of built-in functions. In addition, you'll be able to create your own forms like receipts, letters, promotional mailings, labels, etc.

We're nearing an early beta test release which will be available to any current customers (your updates subscription will need to be current). For our own testing and to make sure we're covering as many bases as possible, we would like to start collecting examples of the kinds of reports that would be useful to you, and what kind of customization features you would want on receipts and forms.

Any ideas are welcome. This could be a simple need like "add the customer's E-mail address on the Arrivals view" or "print our campground name in larger text on receipts". Or you may have unusual report needs like showing how many campers each month had more than 2 children, for each type of site.

Some of your suggestions may be used as examples in the documentation or in future newsletters, or possibly even as new standard reports in the program, which will save you the effort of doing it yourself. So E-mail us with your suggestions, or FAX an example if necessary (please avoid calling if possible -- we don't want a flood of calls making it difficult for those needing urgent support).

Q & A

Switching linked masters on split reservations

Q: We have a guest who checked in and we made the reservation the master and added sites as he moved around the park (using the Split function). We want to change the master to the newest site, because when we print his invoice it shows the old site number.

A: There isn't any way to change the linked master after the fact, other than starting over (delete the master and add it back in as a sub-member).

If you're using version 3.5 or later, then when you Split a reservation there's an option to make the new site the master (which is recommended so that the new site shows on the invoice).

Reporting POS sales separate from rentals

Q: When I want to see how much business we've done in camping or store sales (subtracting discounts,refunds,taxes,etc) what are the filters that you would suggest using?

A: To get camping charges separated from store sales, use the Point-of-Sale options in the filter (Include POS or Include non-POS, through More Filters on the Transactions tab view). Or if you want to include sales from one workstation (e.g. in the store) but not others, filter by the Workstation number (version 3.5 is required for Workstation filtering).

Avoiding tax on certain fees

Q: We have some charge categories that aren't taxable, such as Cancel Fee. When we add this charge manually, how can we keep the tax from being selected every time (without disabling it for all charges)?

A: You'll need to have version 3.6 of the software to selectively enable taxes. In Maintenance / Park Setup / Taxes, you can select which categories get taxed by default, so you don't have to remember to uncheck it. Just click the "Categories" button for the tax, and choose which categories the tax should be enabled for.

Looking up customers by phone number

Q: When entering a new reservation, is there a way by to search for a customer by telephone number first rather than last name?

A: You can search by phone # but it takes a couple extra steps:

1. In New Reservation, click Find Customer (or press Alt-F).
2. Make sure the Filter-by has "Phone Number" selected.
3. Enter part or all of the phone #, and press Enter. Note: enter only digits, no punctuation.
4. Double-click on the customer found (or just press Enter if the correct customer is highlighted).

How to do an "on account" sale

Q: A clerk wants to enter a P.O.S. sale on someone's account by selecting the customer for the sale, but when "Done" is clicked it says that a payment must be entered. Do we enter a payment with "On account" as the payment method?

A: Using "On account" as the payment method is not recommended -- that payment method is intended for entering previous customer credit balances which existed before Campground Master was used. What you need to do is change the Access Levels to allow clerks to do customer sales without entering a payment.

Go to Maintenance / Park Setup / Access Levels, and look for the entry "POS - Add POS sales to Customers (without full payment)". Edit that access level and select "Clerk" for the access level. You may also want to do this for some of the other items, e.g. for adding POS sales to Reservations as well as Customers.

By the way, if you don't see the "Select Customer" option at the top of the POS Sales entry screen, then you may want to get the latest version so that on-account sales are easier. The old method requires locating the customer first, then going to New/Edit Transactions and then to POS.

Printing all customers by record ID

Q: Is there any way to sort and print by customer record number? I would like to print off a complete list of customers by record number.

A: The only place you can get a list sorted by record ID is in through Maintenance / Raw Data Tables / Customers. But that will show **all** customer fields and would be a rather large printout. One way to handle this is to "shrink" the fields you don't want by dragging the column header dividing lines, before printing. Or if you have Microsoft Excel, you might want to Export the raw data (to a CSV file), then open that in Excel to get rid of the columns you don't need to print.

Tips & Techniques

Resolving "Workstation already in use" network errors

When starting up a Campground Master client workstation, you may occasionally experience the message that its Workstation ID is already in use.

Correcting this usually requires a restart of the Master workstation, or at least a Stop/Start of the server task (through Maintenance / Network Functions on the master).

The cause of this is usually a Windows network glitch that causes the connection "socket" to disconnect without proper notification to the Campground Master. This can be more common in wireless networks where glitches can be more frequent.

However it can also happen if the client requests a full database refresh when it starts up (a timing issue causes it to reconnect too quickly, especially in versions prior to 3.6), so if it keeps happening even after rebooting the master then try restoring the client's database from a backup (from the master) to make sure they're in proper sync -- this will keep it from requesting the full database on startup.

Also, make sure Network Setup option "Request full database update very time connected" is **not** selected. (In recent versions, this is on the Diagnostic Options tab of Network Setup.)

Blocking sites for many days at once

Using the right-click function to make sites unavailable one day at a time is handy for blocking out sites for a few days for maintenance, but not for blocking out lots of sites for extended periods.

To make one or many sites unavailable for many days, there's a quicker way and a quickest way, depending on how adept you are at copy/paste.

The quicker way is to go into Site Details for one site, and enter the date range in "Special dates unavailable", like: **11/23/05 to 12/9/05**. (If there are already dates in that field, just add this to the end with a comma separating it.) If you need to do multiple sites, then highlight that text and copy it (Ctrl-C). Click the Next button to get to the next site, then paste the text in that field (Ctrl-V). Repeat for each site needed.

The quickest way, assuming this is the **only** date range of interest (e.g. the dates unavailable will be the same for each site) is to use the Raw Data Tables for Sites. (Go to Maintenance / Raw Data Tables / Sites, and then select "Allow editing of fields" to enable editing.)

Enter the date range in the "Dates Unavail" column for one site, copy that text, then select that field for all necessary sites (e.g. the entire column), and then Ctrl-V to paste. It will paste the dates into all selected cells. **However**, there is no "undo" or "cancel" on this -- we don't recommend trying it in your database without making sure you have a current backup.

Note: The fields (rows) that you paste into must be contiguous -- if there are any gaps in the selected area to be pastes, the program will lock up. This is a newly discovered bug that will be fixed in the next release (after 3.6).