Newsletter #21 (Mar 11, 2006)

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What's New

Beta testing status

We've been working hard on this new version (which is why there hasn't been a newsletter for over a month), and the first beta test release is in use by quite a few customers already. Only a couple minor issues have been reported, which is great, but we're hoping to get more feedback.

We're working on a couple more new features for the next beta release:
- Menu customizations (add your own commands, and rename or delete menu items)
- Dialog customizations (adding fields, special validations & prompts, etc.)

These should be ready by the end of March.

Q & A

Searching by Confirmation number

Q: Can I search for a reservation only by confirmation number? I had a customer leave a message on the answering machine that didn't give me a name just a confirmation number.

A: Yes -- In Reservations / Find Reservation, simply change the "Filter" drop-down to Confirmation #. Only part of the number has to be entered, it doesn't have to match exactly.

Changed field name but dialog label didn't change

Q: I changed the "# Adults" field to "# People" in Data Field Definitions / Customer Fields, but it still shows "Adults" on the New Reservation dialog.

A: You also need to change the name of this field in Reservation Fields -- there are matching fields for Adults, Children, and Pets.

Checking out a customer with a balance

Q: How can I get somebody checked out if they didn't pay and still have a balance?

A: It's usually best to get the balance zeroed-out for bookkeeping reasons, by entering negative charges if necessary (perhaps adding a special category for "Write-off" for such instances). In some cases you might have to go into Reservation Details and check "Disable auto-rate recalculations" to keep it from changing the balance, especially if you're adjusting dates on the reservation due to a shortened stay. However you can also tell the program to allow check-outs with a balance if you really want to leave it that way (perhaps you expect to collect the money later).. Go to Maintenance / Program Options / Functions, and uncheck "Don't allow a reservation to be checked out if it has a balance".

Clearing a site due to early departure

Q. How do I get somebody that checked out early off of a site, to allow somebody else on the site?

There are a couple ways to solve this, depending on the situation --

1. If you just need to remove him for some of the days (e.g. he was on the site for at least one night but left before his scheduled check-out date), then go into Reservation Details and adjust his Last Night accordingly. If you've already checked him out, then you'll need to undo that (click on "Checked Out" to uncheck it). After adjusting the date, then do the Check-out. That will free up the Rack for the days after that.

2. If you need to remove him completely, e.g. he didn't even stay one night, then you need to Cancel the reservation. In Reservation Details, undo the check-out as mentioned above (if you already did the check-out) and also undo the check-in -- e.g. click on "Pending" to go back from Checked In to Pending. Now, click on "Cancelled" to cancel the reservation. This will remove it from the Rack.

Receipts with running totals

Q: Is there a way to print a receipt with a "running total", like we see in the Balance column of Transaction History? Sometimes that makes it easier for our customer to understand.

A: Yes there is a receipt format for that -- just select the "Register-style statement" from the receipt format list (above the Print Reservation Receipt button).

Tips & Techniques

Handling Gift Certificates

Does your business sell gift certificates, which can be redeemed later?

This is how we recommend handling the sale & redemption of gift certificates. While it may not work in every case, depending on how you need to handle them for accounting purposes, this should provide a workable solution.

First of all make sure you have a special Transaction Category for Gift Certificate (through Pick Lists). Also if you Export to QuickBooks, don't forget to add this to QuickBooks mapping, with it being mapped to an Income type of account in QuickBooks.

When you sell a certificate, enter it as merchandise -- e.g. use a Charge transaction for the certificate itself, then of course a Payment from the customer. If you charge tax on the certificate (in addition to the "face" value) then add the tax also. If you only have certificates of certain values, you could add them as merchandise Rates to make this a little easier (so you can just select it from Select Rates).

When it's redeemed, treat it as returned merchandise -- do a Charge transaction, but use a negative Qty (e.g. Qty -1, Each $20). That will give them a credit toward whatever other charges they have. Again, make sure Sales Tax is "added" for it only if you charged the tax for the original certificate (which would credit the tax now).

You can also use the POS for this if you prefer. If you have fixed value certificates you can do them as inventory items (and when redeemed, enter the negative Qty *before* selecting the certificate item). Otherwise use the "Other Charge" function to enter them.

If you export to QuickBooks, note that it won't go into A/R unless of course they don't pay for it up front. The Gift Certificate account will act as a holding account, though -- gift certificate sales will be added to that account, but when they're redeemed it will subtract the amount from that account (just like returned merchandise would be). The Payment will go in when it's sold, not when it's redeemed.

Handling special-case rates

We often encounter customers that have special-case rates, such as "grandfathered" rates, cash-payment rates, special event rates, etc that they don't know how to set up to work with auto-rates.

Sometimes this can be done using a "Discount" type, but this can cause a problem when it "remembers" that discount and tries to use it the next time when it shouldn't really apply. Another alternative is by using a special Reservation Type (which also could have some advantages for reporting or filtering reservations), but that could be awkward or confusing in some cases.

We usually recommend setting it up so that you just need to check a "preference" box on the reservation to make it use the special rate. As an example, lets say you offer a discount on boat slip rentals if they're also renting a room. Basically, you need to add an attribute/preference field like "Slip w/Room", select that when applicable, and define the lower rate to apply only if that attribute is selected.

Here are the details:

1. Go to Maintenance / Data Field Definitions / Reservation Fields and locate an Attrib_ field that you're not using, and change the Status to "Enabled". Also modify the "Normal Header" accordingly, e.g. to "Slip w/room" (try to keep it short). Note that it should be a yes/no kind of attribute field.

2. Go to Maintenance / Program Options / Reservations and select that field for one of the available Quick-select Preferences. This will add a checkbox for it on the New Reservation dialog.

Note: For any existing reservations that this should apply for, you need to go into Reservation Details for the reservations, then click "Site Preferences", and check the appropriate box.

3. Go into Rates Setup and Edit the special lower rate. Select the new attribute field in "Applies if reservation field". It will show "True" after the field name when you select it, so leave that selected.

4. Make sure that the lower special rate is *above* the normal rate in the Rates Setup, so it checks that condition first, before defaulting to the normal rate.

Putting different text on confirmation letters

The main place for editing the text on confirmation letters of course is Maintenance / Park Setup / Confirmation letter text & options. However there may be cases where you need to include different rules or information depending on which type of rental is involved.

There is actually a field for Sites so that every site can have different text at the bottom of the confirmation letter. To use this:

1. Go to Maintenance / Data Field Definitions / Site Fields.

2. Locate the Field ID "Site_Confirmation_Text", and change its status to Enabled. Note that there's also a "Site_Confirmation_Text_Host" field, but that's for a special purpose (see the program documentation for details).

3. Now when you go into Site Details (either through a right-click on the Rack or through Site Setup), you'll see a Confirmation Text button. Just click that button for each site to enter the text you want to appear at the bottom of the confirmation letters. Of course once it's entered for one, you can use Copy/Paste functions (Ctrl-C/Ctrl-V) to copy it into the other sites that need the same text.

Note that sites which don't have any text entered for that field will still use the text in the normal setting (through Park Setup). So to minimize effort, make the text in the normal setting be what you use for most sites. Then only fill in the site-specific Confirmation Text for those that need to be different.

Miscellaneous

Networking through a dynamic internet IP address

This tidbit was submitted by one of our customers, as a solution to accessing Campground Master while away from the office even though their internet connection does not have a static IP address.

We always encourage getting a static IP address from your internet provider so that you can easily connect through the internet no matter where you are (e.g. from a laptop), so you can tap into the network as a Campground Master client. Usually if you don't have a static IP address, you need to find out the current address before connecting, e.g. by calling someone in the office and having them check it, and enter that address in the Network Setup each time.

However a solution has been found that works around this through the free service at the web site below:

http://www.dyndns.com/services/dns/dyndns/

Apparently it works great if you have a LinkSys router with built-in DDNS client, but can also work using a piece of software they provide.

Note: This has not been tested by us and is pretty high on the technical scale we -- we're offering this information for reference only, so if it's of interest you can pass it on to your network administrator.