Newsletter #43 (Aug 6, 2017)

Contents

A couple quick reminders:

Make Backups! It's so sad when we hear from someone whose computer has crashed and they have no backup of their data to restore from. It's so easy to make a backup to a thumb drive, there's really no excuse for not doing it at least once per week, if not daily.

Re-installing / Installing on a new computer -- This is the number one support question we get, even though we've put the information everywhere we can possibly put it: in the documentation, in the Support menu on our web site, and directly on the Help menu in the program. You'll need this information eventually, so make a note of how to find it now so you don't have to ask later. See our web site under Support / Installing on a new computer.

What's New

Upcoming new version

A new version 9.1 will be available soon (September estimated release date). The main features in this release are improved support for **E-mail receipts and invoices**, and support for **Batch E-mailing** to any list of reservations or customers. Of course there will also be a number of other minor changes and bug fixes.

As always, existing customers will be notified by E-mail when the new version is released. Please make sure we're kept up to date on your E-mail addresses, and make sure our E-mails are not going to your spam folder (any time you find our E-mail in spam, be sure to mark it as "not spam" to keep future E-mails from going to spam).

Of course your updates & support subscription will have to be current in order to get the new version. If you're not sure whether you're current, check your "Upgrades free through" date under View / Product authorizations.

That will need to be 9 / 2017 or later in order to get the new version. (If you did renew recently but this date doesn't look updated, then you probably didn't enter the new Auth code we sent with your order confirmation).

If you need to renew, see the web site here:
http://campgroundmaster.com/upgrade.html

Some tips when calling for support

We encourage using E-mail for support questions if possible, since it's often easier to answer a question if we can direct you do an existing article that exactly answers your question. Sometimes we can even answer E-mails faster than phone calls (especially in problem cases like mentioned below).

However if you need to call or simply prefer using the phone, here are some tips for getting faster and friendlier support.

1. Keep in mind that most of the time (and I mean 98% of the time), you will only get voicemail -- often it's because we're already busy helping someone else (either on a call or answering an E-mail) and will not interrupt one to answer another, but sometimes we're simply away from the phone for awhile but will get back to you ASAP if you leave a message.

2. Call **once** and **leave a message**. It sounds simple, but sometimes people keep calling over and over thinking they will eventually "get through". It won't happen, and is simply annoying when we're trying to help someone else.

3. If you don't hear back within 30 minutes to an hour then go ahead and call again and leave another message, just in case something went wrong with the first one and we didn't receive it or couldn't understand it. But don't keep leaving messages over and over -- the more times we have to listen to your message, the more time it takes to get through them and the further back in the queue you will get.

4. If we call back and you "just missed" the call, **don't** immediately hit re-dial or call back -- most likely we'll be in the middle of leaving you a message so you won't get through anyway! **Wait** a couple minutes and check your messages (sometimes your question will already be answered in the message), then return the call if needed. If the timing is right and we see that you're calling back, we may be able to answer directly. Sometimes we've already moved on to the next call and you still need to leave another message, but if you call back too soon then all that does is make us keep playing message-tag and missing each other, wasting time for both of us.

5. When leaving a message, explain who you are, who you're with and the nature of the call -- and don't forget a phone number!! If we have to look up your information, that can delay a callback for up to 4 hours, and that's assuming we can figure out who you are and have the right number in our database. We will not use caller ID to return calls even if it's available, and it isn't available if we're on the phone when you call. Be sure to enunciate clearly to overcome the bad sound quality of phone lines (especially cell phones) -- many times 2's and 3's sound the same, 0's sound like 1's or 4's if you say "oh" instead of "zero", etc. It also helps to say the number twice in case of static and cell phone dropouts -- preferably once at the very beginning of the message and again at the end.

EMV / "Chip" credit card support

The last release (version 9.0, Sept 2016) included EMV support for X-Charge and Cayan (MerchantWare) users. In case you're not aware of it yet, or have questions about getting set up with it, please refer to our web site for the latest information:
http://campgroundmaster.com/emv.html

If you're not already processing cards through Campground Master and aren't accepting chip cards yet, this would be an ideal time to switch to integrated processing since you will need to get a new card reader anyway.

See here for details:
http://campgroundmaster.com/creditcards.html

Yahoo problem sending E-mails

As with GMail, the Yahoo E-mail service has a new setting that can prevent E-mailing through their SMTP server. If Campground Master suddenly stops being able to send confirmation E-mails and you use a Yahoo account (using the Yahoo SMTP server), it's most likely due to the new feature that blocks SMTP for a lot of people until you change a security option.

To solve it:

1. Sign in to your Yahoo account on the web.

2. Go to "Account Security Settings":
https://login.yahoo.com/account/security#less-secure-apps

3. Toward the bottom you will find a box/section 'Allow apps that use less secure sign in'. Make sure it's "on" (click to the right end of the slider, it should turn blue).

Now E-mail should work.

Q & A

Credit card processing time-outs

Q: We get time-outs a lot when processing credit cards with X-Charge, how do we fix that?

A: If you're using the EMV/chip card terminal with X-Charge, then Campground Master needs to wait a lot longer (since you have to click "Process" first and then wait for the customer to use their card at the terminal). Therefore the time-out value needs to be increased in Maintenance / Credit Cards / Processing Setup. We recommend a time-out value of 180 seconds for EMV terminals. Make sure you change it on every workstation, since it's a workstation-specific setting.

Deleting POS Inventory Items

Q: Can I delete POS Inventory Items without causing problems?

A: If you Delete an Inventory Item (Through Maintenance / POS Inventory Items / Inventory Setup), then any past sales for that item would not show up on the Inventory Sales reports (the transactions and totals would still be there for the Receipts or Charges reports, it just won't know which item was sold). Otherwise it doesn't really hurt anything. So if it's an item that has not been used in a long time and you're not concerned with reporting for that particular item, then it's safe to delete it.

However you also have the option to make the item Inactive (check the "Inactive" box), so history is still there but it won't appear on pick-lists or new reports.

Keeping Customer Notes separate from Reservation Notes

Q: Is there a way to keep the Reservation notes from being copied to the Customer notes, or vice versa?

A: First be aware that Customer Notes (on Customer Details) is separate from Reservation Notes (on Reservation Details), since the Customer record is separate from the Reservation record. So the notes ***can***

be separate.

The normal action is for Customer Notes (the Notes field on Customer Details) to be copied to all **new** reservation's Reservation Notes (in the New Reservation dialog), so for instance you will see any important notes about the customer when making a new reservation for them. These will become the Reservation's Notes, but may be changed for that reservation before it's saved. If you do change them, the changes to the Notes made on New Reservations will get copied back to the Customer notes.

However, either or both of these two actions can be disabled under Maintenance / Program Options / Reservations (see the options "Automatically copy...").

After you leave New Reservation, the Notes fields are completely separate -- any changes to the Customer Notes (on Customer Details) will not transfer to any existing Reservations, and likewise any changes to Reservation Notes (on Reservation Details) will not transfer back to the Customer Notes.

Filter available Sites by Rig Type

Q: How can I make it filter so New Reservation only shows sites that allow trailers, if that's what the customer has for Rig Type?

A: You can't filter specifically by the Rig Type field, but you can set up an attribute.

This would be similar to adding an Attribute to use in the Rates -- renaming an attribute to something like "Have trailer". See this article, but only steps 1 and 2 apply:
http://campgroundmaster.com/news/handlingspecial_caserates.html

In addition, you would need to enable and rename the same Attrib_ field under Maintenance / Data Field Definitions / Site fields (e.g. rename it to "Allow Trailer"), so you can select which sites allow them. Then go through Site Details for each site, under More Attributes, and set that to Yes for each site that does allow trailers.

Now you can select that Attribute on New Reservation when needed to show only sites that allow trailers.

Changing a reservation's text on the Rack

Q: Can I change what text shows on the Rack for a reservation, without changing the customer's Last Name?

A: There is a "Label" reservation field that you can enable (this was added in version 8), and anything you put in that Label will override the text shown on the Rack. Go to Maintenance / Data Field Definitions / Reservation Fields. Locate the "Resv_Label" field ID (it will be about the 7th field) and change its status to "Enabled". Now when you go to Reservation Details there will be a new Label field in the lower right quadrant (above Transaction History). You can make the label as long as you want, but of course you may only see part of it on the Rack (hold the mouse cursor over the reservation to see the entire label, as well as the customer' names).

Note that if you've customized the Reservation Details dialog and put other fields in the area used for the new Label field, this may require you to adjust some field positions.

Using a "Pencil-In" feature

Q: How can I "pencil-in" a reservation like I used to in other software, e.g. to temporarily hold a site for a reservation?

A: A new option was added back in version 6 to support this kind of operation. Essentially you'll use the

Inquiry status, but need to enable it to show Inquiry reservations on the Rack (if they have a Site assigned). Go to Maintenance / Program Options / Functions and check "Inquiry reservations show on the Rack and block others". Now when you're in New Reservation and want to do this, make sure you've already selected a Site (and a customer) and click the "Inquiry" button at the bottom. It will show on the Rack in a different color than those that are Pending, etc.

Note that it will be treated like other reservations on the Rack, and will block the site from other reservations just like a Pending reservation. It will be up to you to get back to it later, or to notice the different color indicating that it's just an Inquiry and decide whether to make it Pending, Confirmed, etc or to Cancel it.

There is also an option (in Maintenance / Program Options / Functions) to include sites with those Inquiry/Pencil-In reservations as "Available" when using the "Show Available" option -- so if this is selected then it will still show the site as though it's open even though it has the Inquiry on it. Of course you would need to cancel the Inquiry or move it to another site in order to actually assign that site to another reservation.

Tips & Techniques

Proper Rates order for Auto-Rates

One of common issues in getting Auto-Rates to work is the order of the Rates. While it's natural to want to put Daily first, then Weekly, etc, when entering the rates, that's actually the opposite of what the program needs and will result in Auto-rates wanting to charge the daily rate for all reservations.

The program looks top-down for the first/best matching rate, and will use the first one it finds that can "apply to" the reservation. So the "cheapest per day" rate is usually first, as well as any "special case" rates you need to override a normal rate like holidays or higher season rates.

Here is a typical order for proper operation, given a common situation of 2 different seasons, a daily discount rate and a special holiday daily rate:

Monthly high season
Monthly low season
Weekly high season
Weekly low season
Holiday daily
Discount daily high season
Discount daily high season
Normal daily high season
Normal daily low season

Note that they are essentially in order of priority, so you can "read" them like an "if.... then... otherwise..." structure. For instance:

If it's a month or more in high season, then use the Monthly high rate....otherwise,
If it's a month or more in low season, then use the Monthly low rate....otherwise,
(... skipping high/low from here on for simplicity ...)
if it's a week or more, then use the Weekly rate.... otherwise,
if it's a on holiday, then use the Holiday rate... otherwise,
If they have a discount, then use the discount rate.... otherwise,
Use the normal daily rate.

This is basically what the program does, so once you understand this then it should make a lot more sense.

<u>Other notes:</u>

If there are "leftover" dates after the first pass through, then it repeats again for the remainder. For instance if it's 1 month plus 17 days, then it will use the Monthly rate, then go through again for the other 17days... it will find that the Weekly rate can be used twice, then go through again for the remaining 3 days and use the appropriate Daily rate.

Of course all of this would need to be replicated for each Site Type, etc.

It doesn't matter if you group them with all Cabins together and then all RV's together, etc, or whether you put Monthly for all site types first, then Weekly for all site types, etc. -- as long as the rates themselves are properly qualified with the Site Type selection , etc.

Note that the high vs low season order doesn't matter, as long as **both** are properly qualified with Season Dates Applicable.

Likewise, the Discount rates, Holiday rate, etc need to be properly qualified so that they only apply when they're applicable (see Rate Setup Examples).

A lot of other situations can be handled similarly, for instance weekend vs weekdays in place of the "Normal" daily rates, etc.

The specific rules are detailed here:
http://campgroundmaster.com/help/auto_ratessetup.html

The Rate Setup Examples also explain the proper positioning of various rates like weekly and holiday:
http://campgroundmaster.com/help/ratesetupexamples.html

Query for Arrivals filtered by Resv Type, etc

A new "Quick-Filter" feature added in version 8 made it much easier to create simple Queries where you just need to mimic something like a tab view but with additional filtering, as long as that filtering is available through the normal Reservation Filter found in many functions.

Here's an example of creating a Query that's similar to the Arrivals tab view, but additionally filters to only show reservations with the "Normal" Reservation type.

(As with any Advanced Customization function, Queries can get pretty technical. We recommend reading through the documentation if you want to understand more about making custom queries. Normal support does not include help with Queries or other Advanced Customization functions.)

Follow these steps:

1. Go to Maintenance / Advanced Customizations / Queries.

2. Click "Add Query".

3. You'll be given a choice of List or Cross-table -- select "List Query".

4. Enter a name for the query -- e.g. "Arrivals of Normal type"

5. Select "Reservations" for the Base Table.

6. Click "Quick-Add Fields". This is an easy way to select the fields (columns) you want to be shown in the report.

7. Double-click on each data field you need to see, changing the Data Table if needed to find appropriate fields

-- e.g. First Night, Last Night, Site Name, Status, etc. for Reservations, then change to Customers table to select Last Name, etc. As you double-click each one in the left-hand column, it will move to the right-hand "Selected" column. If you have trouble double-clicking, you can click on the field and then click the "-->" button to move it over. Click "Done" when finished adding fields.

8. Click "Edit Filtering Conditions...", then click "Quick-Filter Auto-Builder". This will open the Reservation Selection Filter. For an Arrivals-type query you would select Filter by date, and select Start Date. The option "Using the Query's from and to dates" will be selected by default, which is what you want. Now for the Reservation Type filtering, just select "Normal" from the Reservation Type list at the bottom. Any other conditions that you want to apply could also be selected at the same time, for instance to be truly like Arrivals you need to include only reservations with Pending,Confirmed, or Guaranteed status so select those from the Status list. When done here, click OK. A prompt will ask whether to use text comparison for pick lists -- go ahead and click Yes.

9. Click Done to get back to Edit List Query Definition. You can click "Save & Test" to make sure it works OK if you like.

11. Save & Close, back to the main screen.

If this is your first query, you'll notice that a new "Queries" tab view has appeared between Payments Due and Transactions. Go to that tab view and select the new query from the list at the top.

Color-coding Sites dirty, Work order or Journal entry

Back in version 8 we added some new features for Sites like the "Dirty" flag, Work Orders and Journal entries. These have probably not been utilized to their fullest extent by most parks, but if you are using them then there is also a new sample Color Scheme you might want to use. This can be used on the Site column or the Type column on the Rack to indicate that the site is dirty, has Work Orders not yet done, or a new Journal entry was added in the past week. (For more information on these features in general, open Site Details for any site and press F1 for help).

Here's how to import and implement the sample color scheme:

1. Go to Maintenance / Advanced Customizations / Color Schemes, and click "Import schemes".

2. You need to locate the Samples folder, which is typically C:\Program Files\Campground Master\Samples (most likely you just need to double-click the "Samples" folder to get there, but you may have to navigate to the location first using the "Look In" drop down at the top).

3. Now select the file "Sample Color Scheme - Site Dirty, Work Order, or Journal", and click Open. That will add a "Dirty column" color scheme. You can edit the scheme and change the colors if you prefer. When finished. Close the Color Schemes Setup dialog.

4. Now there's one more thing you need to do -- select this scheme for the desired Rack column. Go to Maintenance / Advanced Customizations / Select Global Color Schemes, and select the scheme "Dirty column" for either "Override Site headings with color scheme:" or "Override Site headings with color scheme:" (or you can do both), and then Save.

Color-coding Reservation Types (revisited)

A previous newsletter explained how to add a Color Scheme to color-code new Reservation Types. However there's a much easier way to do it using the new "Quick-Add" feature added in version 8. Here's the revised information using the new feature.

If you add special Reservation Types for weekly, seasonal or other special reservations (e.g. through the Pick

Lists), then you may want to show them in different colors on the Rack. The normal Color Key only understands the standard "Base" reservation types, and can't be added to directly. However with the Color Schemes function, you can create your own color scheme for your new reservation types.

What you need to do is create a color scheme that has rules for each condition that can exist for a reservation (e.g. pending, checked in paid or not paid, etc.), for each new reservation type. We can use that color scheme to "override" the normal color scheme for reservations -- it will check your rules first, and if none of those conditions are met then it will use the standard color definitions (so you don't have to re-define all of the standard ones yourself).

Here is an example of handling a new reservation type called "Weekly" (which of course would have to be added through Maintenance / Pick Lists / Reservation Types).

1. Go to Maintenance / Advanced Customizations / Color Schemes.

2. Click "Add scheme definition", and give it a name like "Reservations override". Note that only one Color Scheme can be used to override the normal reservations colors, so if you have multiple types, etc. then the rules for all of them need to be defined in this one scheme.

3. Select the Default scheme "Reservations".

4. Click "Quick-add Resv Type", and select the Reservation Type from the list that appears. A list of Rules will be automatically added with the appropriate expressions programmed in them. The colors assigned at this point will be the same as the Base type (e.g. Normal or Monthly).

5. If you have more than one new Reservation Type you want to color-code, repeat step 4 for each one (they must all be in the same Color Scheme definition).

6. Now you just need to edit the colors -- double-click on each Rule (line in the table) to Edit Rule, and then use the Change Text Color and/or Change Background Color accordingly.

7. Now once the scheme is complete and you Save it, there's one more thing you need to do -- make this scheme the default for reservations. Go to Maintenance / Advanced Customizations / Select Global Color Schemes, and select the scheme you just created in the drop-down list after "Override reservation names with color scheme:".

Now your new colors should be used on the Rack and other tab views, wherever a reservation name is normally colored. The Color Key will also show your new definitions along with the default ones, in case the operators need a reference. You can also edit the new colors directly from the Color Key.