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## Newsletter #1 (May 22, 2005)

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#### **Miscellaneous**

See your park from space!

### What's New

#### **Rate Setup Examples**

One of the most daunting tasks of setting up Campground Master is the Rates. If you've put off setting up your rates because it's too technical, we can certainly understand that. Questions about rates setup are the most common type of support call we get, and admittedly it's due to the lack of practical examples in the documentation.

We're working on changing that, and we've already come up with a number of examples for the most common situations. We'll add more examples eventually, but the basic ones we've created should certainly help get you started, or perhaps help you fine tune your own setup. The rates examples have already been added to the software manual (as well as the downloadable PDF manual or e-Book).

### Q & A

#### **How long is the Notes field**

##### **Q: How long is the Notes field for reservations?**

The Notes fields for any type of records (Reservations, Customers, Sites, etc.) can be any length. You could copy entire pages of text there if you like. Obviously it only shows a little bit at a time on the Reservation Details page, but you can scroll the field -- or better yet, click the little "..." button next to the notes to open a multi-line editing box. In addition, reservation notes will be shown entirely if you view the Quick-Info window by double-clicking the reservation on the Rack view or other tab views.



## Changing "Normal RV", etc to something else

### Q: How can I change the "Normal RV" and "Deluxe RV" site types to show something else?

These come from the Site Types pick list, so not only can you change them, you can add as many different types as you like. The normal and deluxe types are just defaults used as examples. Go to Maintenance / Pick Lists / Site Types to edit the list. You'll need to check the box "Allow editing of fields" before changing anything -- this is like a safety switch, since any changes made here are instant and non-reversible.

Be careful about deleting types already used -- it's better to just change the text for the ones that are there, and add any more needed. Also note that you can change the order using the Move Up and Move Down buttons -- this changes the order they appear in various lists, reports, etc., so that you can arrange them any way you like.

## Tech support on weekends

### Q: Are you available for tech support on weekends?

Yes, we are available on weekends if it's an urgent matter. As always, just leave a message, and we'll reply as soon as possible.

Of course E-mail is also an efficient way to get support, and we will respond as quickly as possible (almost always within a couple hours if it's an urgent issue).

Routine issues

## Occupancy and Availability reports incorrect

### Q: Why do my Occupancy and Availability reports show all 0's instead of correct data?

This is most likely due to the filtering, since each type of report always uses the last filter settings used. In the report dialog, click "Site / Reservation Filtering", then click "Reset Filtering (include all)", then click "OK". Don't forget to Generate the report if you don't have Auto-generate selected.

## Tips & Techniques

### How to keep duplicate credit card charges from being rejected

If you're using the X-Charge or Cayan software for credit card processing through Campground Master, you may have noticed that it will reject duplicate charges (for the same amount for the same customer if they happen on the same day). A common reason situation this comes up is if the one person is making deposits for multiple reservations.

There are a few ways to avoid this problem:

1. You can tell X-Charge to allow duplicate transactions -- in the X-Charge Server, go to Setup, click the Credit Cards section, and check the box to Allow duplicate transactions. Also, you need to enable "Allow duplicate..." in Network Setup on Campground Master (this is an option in later versions -- earlier versions will always allow duplicates).

HOWEVER, we don't necessarily recommend this method because it can result in accidental duplicate charges in certain timing conditions (see the next article).

2. You can enter slightly different amounts for the charges. For instance, enter \$49 and \$51 instead of two \$50 charges. This is obvious enough but it's a messy solution.

3. If you're trying to make deposits or payments on non-synchronized reservations (as opposed to merchandise sales outside of reservations), then instead of entering separate payments, make the payment for the overall total on the first reservation. Then use the Transfer Deposit or Transfer Payment function to transfer individual amounts of the payment to the other reservations. For instance if you need four \$25 deposits, enter a Deposit of \$100 charged to the credit card. Then use Transfer Deposit three times to move \$25 to each of the other reservations.

Of course this last technique can also be used for any deposit, even if it's paid by check or by a credit card that you don't process through Campground Master.

### How to avoid duplicate credit card charges

If you're using the X-Charge or Cayan software for credit card processing through Campground Master, there is a timing condition that can cause charges to be processed twice while Campground Master thinks it was only processed once. More specifically, if you get a "Timed-out" message in Campground Master when processing a card, it's possible that the charge has already gone through.

There are a couple ways to avoid this problem:

1. The most foolproof way to prevent this is to tell X-Charge or Cayan to NOT allow duplicate transactions -- in the X-Charge Server, go to Setup, click the Credit Cards section, and UNCHECK the box for Allowing duplicate transactions. Of course this makes it more difficult to enter the payments needed in some cases, as mentioned in the previous article. Nevertheless, we recommend this to prevent double-charging your customers -- use one of the other ways mentioned previously to handle multiple charges on reservations when needed.
2. If you can't use the method above, then you need to make sure that Campground Master will never time out before the credit card processing software gives up. Make sure the Dial Attempts is set to only 1 in the X-Charge server, for instance (see Setup, Credit Cards, Connections.). Also increase the Timeout in Campground Master to a larger number (see Maintenance, Credit Card Processing Setup). If you continue to see timeouts, keep increasing the timeout value.

So what if you get a time-out anyway, or if when you do retry it returns an error that it's a duplicate charge?

First verify in the processing software that the charge is there. Then to enter the charge in Campground Master without attempting to process it again, disable the Credit Card Processing function temporarily (uncheck the "Enabled" box in the setup), enter the payment, and then re-enable Credit Card Processing.

### How to quickly select dates for short-term stays

Here's a quick tip that can speed up entering some multiple-day reservations.

1. Instead of double-clicking on the Rack, just click the telephone icon for a New Reservation.
2. Locate the site you want to use, and make sure the dates you want are visible in the grid.
3. Now click-and-hold the mouse button on the beginning of the new reservation (in that site's open cell under the start date), drag the mouse over to highlight all of the nights needed, and then release the mouse button. The open cells on that site for the dates needed should be highlighted (usually in dark blue).
4. Click the Add Selection(s) button.

There, you've replaced multiple clicks with one click-drag and one click!

**Bonus:** If it's a group reservation and the sites are all together, you can drag down to highlight multiple sites at the same time you're dragging across to highlight multiple dates, and all of the highlighted sites will be added as synchronized reservations!

**Double Bonus:** You can continue to add multiple sites the same way, only you don't need to select the exact dates -- just drag straight down to select multiple sites for a single date, and the previous date range will be assumed when you click Add Selection(s).

**Triple Bonus:** Ctrl-click and Ctrl-click-drag also works to highlight multiple sites that aren't all together. The only restriction is that they all have the same dates selected, or only one date selected (in which case it uses the same dates you previously selected).

## How to rearrange sites on the Rack

This mainly applies to versions prior to 3.1.7 (beta release). If you're using the latest beta, moving sites is more easily done directly through the new Park Setup / Sites dialog.

When you're setting up your sites, you probably at least once forgot to enter a site in order, or wanted to change their order on the Rack later. The trick is that they will appear on the Rack in the same order as they appear on the Raw Data Table.

To move sites after they're added:

1. Go to Maintenance / Raw Data Tables / Sites (you must be logged in as an administrator, of course).
2. Check "Allow editing of fields" to enable the functions.
3. Locate the site to be moved, and click on the first cell of the row (on the grey record ID #) to select that row.
4. Click the "Move Up" or "Move Down" button to move the site, repeating as needed.

Multiple sites at once can be moved simply by selecting the ones to be moved -- using click-drag, Shift-click or Ctrl-click. Just be careful to only click on the grey column so it selects the whole row. While it will technically work even if you click on other cells, you may accidentally wipe out a whole bunch of data this way.

## Miscellaneous

### See your park from space!

Have you tried the free Google Satellite Mapping feature? Depending on your location, you can get a rather detailed satellite image of your park, with the RV's clearly shown in each space.

Try it:

- Go to <http://maps.google.com> - It may take a minute to load.
- Enter an address -- a street address or at least a city & state, and then Search.
- OK, a street map is nice -- but now click on "Satellite" in the upper right.
- Hello! Wave to the satellite! (OK, it's not real-time and it doesn't have fine detail in all locations, mostly just around large cities, but it's still a lot of fun.)
- Try zooming in as far as possible, then zoom out to see the surrounding areas. You can move the map around just by grabbing it with the mouse and dragging it.

We hope you've enjoyed this diversion. We've actually used it a few times to see what our customers' parks look like!

## Newsletter #2 (May 26, 2005)

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### Contents

#### **What's New**

Integrating the Vacancy Grid with your reservation form

#### **Q & A**

POS - Some items not showing up  
Rates for holidays  
Showing "Room" instead of "Site"  
Ticket form missing the guest signature line

#### **Feedback**

Reader Comments - POS item idea, and a reason to use an online reservation form

#### **Tips & Techniques**

Showing underlines for hot-keys in XP  
How to handle key deposits  
What to do if Campground Master won't start

### What's New

#### **Integrating the Vacancy Grid with your reservation form**

If you're using the "Export to Web Vacancy grid" function and you also have your own reservation form on your web site, you may have been wishing you could automatically insert the site and date selected into the form when your customer clicks on one of the "V" links in your vacancy grid. The old example just has the "V" links opening an E-mail, where it can show the site and date in the E-mail's subject, but that's no use if you want them to fill out a form -- and of course to use the new Online Reservation functions you'll want to use a form, not just an E-mail.

Now we've discovered a way to do it, and it doesn't require CGI, PHP, or any other special web server programming. It can be done in Javascript, which for the most part you can simply plug into your existing HTML page for your web form. (This does require a bit of HTML coding knowledge, but should be just a 10 minute job for any web page designer.) We've created the code necessary to do it, as an example you can plug into your web form.

If you're reading this newsletter online or as an e-Book, click here: [Javascript Example](#)

If this is the PDF version of the newsletter, the example is already included at the end.

### Q & A

#### **POS - Some items not showing up**

**Q: Why don't some of my inventory items show up when I try to do a POS sale?**

(Applies to the Point of Sale option only)

Chances are that the inventory lookup filter has been altered, probably by accident when setting things up. Go to Maintenance / POS Inventory setup / Filter inventory sales lookup for this workstation. Click the "[Reset Filtering \(include all\)](#)" button ("Reset All" in older versions), and "OK". Now everything should show up.

## Rates for holidays

**Q. Why do my holiday Rates get used for all reservations, even though I put the holidays in the "Special Dates Applicable" field?**

The Special Dates field is often misunderstood. This is used only as an exception to the Season dates -- e.g. if there are certain dates NOT in your normal season that this rate also applies. However if your Season Dates field is blank, the rate is available for all dates anyway -- the Special Dates have no effect. Therefore you need to put your holiday dates in as Season dates, not Special dates. That way the rate will ONLY apply to the holidays.

Of course the other key is that the holiday rate appear before your normal rate, so it gets checked first. Otherwise your holiday rate may not get used at all.

## Showing "Room" instead of "Site"

**Q: Can I change my set up so that it says "Room" instead of "Site" since I run a hotel and not a campground?**

No, the word "Site" can't be changed yet. It appears so many places in the program that it would be a major task to change it everywhere (not to mention the confusion with documentation), but when customizable reports and forms are available later this year you'll be able to customize things to the point it shouldn't be a problem.

## Ticket form missing the guest signature

**Q: When we print our Ticket Form receipt, the "guest signature" is always cut off. Is this something we can fix?**

This is probably because you've put too much text in the "Notice message for Ticket Form" (see Maintenance / Park Setup). The ticket form's box for that area is a fixed size, so you have to limit the amount of text you use or else it will push the signature "out" of the box. So just try removing some of the notice text, perhaps by abbreviating or simplifying it. Again, the upcoming customizable forms functionality will alleviate this problem.

## Feedback

### Reader Comments

Here are some comments from our readers since the last newsletter. (You know who you are, but since you didn't specifically give permission to mention your names we left the comments anonymous.)

### Tip for setting up a POS inventory item (or Rates) where only a variable dollar amount is to be used:

Another tip you might want to consider adding is for fuel I created an Item called "pump1" which has a price of \$1 -- so when you enter a sale for gas you enter Qty 12.22 and you get \$12.22. But what might be a consideration is that when printing a report the real quantity is not known. You would need to convert the \$ amount to Gallons by dividing it by price per gallon.

-- Anonymous

### A couple good reasons to use an online reservation form -- for phone reservations:

Even when someone calls about a reservation, I point them to the reservation page and ask them to fill it out. Talk about lazy on my part, but it is better for 2 reasons: 1 -- I may not hear the correct spelling of a name, street or whatever. 2 -- I can import it faster than keying in the data and go on to more important things, like making sure the current guests are being taken care of and there is pop in the pop machine.

-- Anonymous

**OK, now let's hear *your* comments!**

## Tips & Techniques

### Showing underlines for hot-keys in XP

In the documentation we mention that Alt- hot keys are underlined in menus and on dialogs. For instance the "F" is underlined for the File menu item, indicating that you can press **Alt-F** to go to that menu. However you may not be able to see these in Windows XP, at least not until you press the **Alt** key in the first place.

This is a new option in XP to hide the underlines until you press the Alt-key, and in Microsoft's wisdom they seem to have enabled that option by default in some cases (why confuse the user with all those underlines, right?). So if you don't see any letters underlined in the menu or dialogs then just press the Alt key and the underlines should show up. You can also disable this option in XP by going into Desktop Properties (right-click on an empty desktop area), click the "Appearance" tab, click the "Effects" button, and uncheck the "Hide underlined letters" option.

### How to handle key deposits

Key deposits and other "security" deposits need to be handled differently than the "advance" deposits. When you use the "Deposit" transaction, that's assumed to be an advance deposit that will be applied to the rent or other charges. However for security deposits you don't want this -- and you probably want the balance to show \$0 even though they've paid the deposit, and be able to refund that deposit when they leave.

Here's what we recommend for this:

Set up a Transaction Category of "Security Deposit" if it's not already there (anything besides "Deposit" will work, which is reserved for advance-deposit transactions).

At the beginning of their stay (or whenever you need to enter this type of deposit):

- Enter a Charge transaction for the security deposit, using that Security Deposit category.
- Enter the payment for the deposit as a normal Payment transaction (or as just part of their check-in payment).

This will show the deposit as income now, but you'll have a record of the security deposit because of the Charge transaction, and the separate category allows you to separate it if needed. It will also zero-out the customer's "balance due" so you don't get misleading balance reports.

Now when they leave:

- Select the original Security Deposit transaction and click Reverse Charges to negate it, which will add a negative Charge. (If you're using an older version, you need to manually enter another Charge transaction with the "Security Deposit" category, using a -1 quantity, to show that the security deposit is being removed.) This will give them a credit balance.
- Enter a Refund transaction if there's still a credit left after any final charges.

Of course you can also set up Rate definitions to simplify this, or even have it add the security deposit automatically as an add-on (assuming you use auto-rates). When they leave, go to Select Rates, add the security deposit, and check the box at the bottom to "Invert Amounts" so it's added as a negative charge.

### **What to do if Campground Master won't start**

We suspect that anyone who has experienced this type of problem has already called support by now. However we're posting this information in hopes that if you do encounter this problem you'll remember that it was mentioned here. We don't expect you remember the details of course, but perhaps you'll remember this article and be able to look it up in the newsletter archives (use the Index to search for "Won't Start").

There are some files and a registry setting that Campground Master reads when it starts up. If these become corrupted, possibly due to a computer crash, it may cause Campground Master to get an error on startup or simply not appear on the screen. Of course the program file itself might be corrupted, but it's not likely. If this is suspected, you can simply re-install the same version of Campground Master to overwrite the program files.

Note: This information only applies if the program doesn't appear, crashes or shuts down before you get any kind of prompt. If you get an error message showing that the database is corrupt, can't be found, etc., then that's a different issue and you should simply restore from a backup or otherwise follow the suggestions in the message.

Try these one at a time (testing after each one) to solve a problem starting up:

#### **Clear the last window placement registry setting:**

1. Go to Start / Run (in Windows)
2. Type "regedit", and Enter
3. Open the HKEY\_CURRENT\_USER folder
4. Open the Software folder
5. Open the Cottonwood Software folder
6. Open the Resortmaster folder
7. Open the Settings folder
8. Right-click on the "Window Placement" item and select "Delete"

#### **Rename the latest log file to keep it from being checked:**

You need to know where your database is being saved to in order to locate the log files. This is usually in C:\Program Files\Campground Master\ for Windows 95, ME, 98 and 2000, or "Shared Documents" for Windows XP, or "Public Documents" for Windows Vista -- but you may have saved it elsewhere.

1. Using My Computer or Windows Explorer, navigate to the folder where your database is located. There should be a number of log files there that all start with the database name and include a date and a workstation number after the date, and will have a "prklog" extension or type. For instance, "My Database\_2005-05-23\_0.prklog".
2. Locate the log file with the latest date, which should be today or yesterday.
3. Right-click on it and select "Rename".
4. Press the Home key to move the cursor to the front (make sure the name is no longer highlighted), and type an "X" just to give it a different name.
5. Click on something else to finish editing so it saves the new name.

Note: If this does not solve the problem, you should go back and rename it again, removing the X.

### Rename the Campground Master.ini file:

This file contains Printer Setup information, Network settings, and information about the last database and backup locations, so this should only be done as a last resort. You would need to re-do those settings if this solves the problem. This file will be found either in "Public Documents\Campground Master" (in Windows Vista), "Shared Documents\Campground Master" (Windows XP), or in the C:\Windows\ folder (older versions of Windows or in Campground Master versions prior to v4.2).

1. Using My Computer or Windows Explorer, navigate to the appropriate folder.
2. Locate the file "Campground Master.ini". The letters may all be lower case. If you don't see the ".ini" extension, the file type should be "Configuration Settings".
3. Right-click on it and select "Rename".
4. Press the Home key to move the cursor to the front (make sure the name is no longer highlighted), and type an "X" just to give it a different name.
5. Click on something else to finish editing so it saves the new name.

Note: If this does not solve the problem, you should go back and rename it again, removing the X.

### Attachments

#### Sample Javascript to insert form values (copy)

You can use the code bits below to extract the <site> and <date> parameters from vacancy grid links as default values in your form. This assumes that the "Link Format" in your Export to Web Vacancy Grid setup is in this format:

`http://www.mywebsite.com/reservationform.html?<site>&<date>`

Basically there's a big block of script to extract the variables, then one line of script for each form input field. The latter script writes out the HTML code for the form input field with the value inserted as the default. There's also a <NOSCRIPT> section to write it without the variable if the user doesn't have Javascript enabled in their browser, which should be the simple <input> field for your form.

**Note:** Make sure that your site names don't have the "&" character in them, or else they will confuse the code.

#### Insert this code before the form to extract the variables:

```
<SCRIPT TYPE="text/javascript">
//
// This block of code extracts the <site> and <date> variables
//

var var1 = location.search.substring(1, location.search.length)

// replace %20's with spaces so they're readable
while (var1.indexOf("%20") != -1)
{
    var index = var1.indexOf("%20")
    var first = var1.substring(0,index)
    var last = var1.substring(index+3,var1.length)
    var1 = first + " " + last
}

// replace %26 with the & so we can find it
while (var1.indexOf("%26") != -1)
{
    var index = var1.indexOf("%26")
    var first = var1.substring(0,index)
    var last = var1.substring(index+3,var1.length)
```



```

    var1 = first + "&" + last
}

// extract the two parameters
myparams = var1.split("&")
var param1 = ""
var param2 = ""
if (myparams.length > 0) { var param1 = myparams[0] }
if (myparams.length > 1) { var param2 = myparams[1] }

// see if it's in "May 23, 2005" format

dateparts2 = param2.split(",")
if (dateparts2.length == 2)
{
    dateparts3 = dateparts2[0].split(" ")
    if (dateparts2.length == 2 && dateparts3.length == 2)
    {
        month = dateparts3[0]
        day = dateparts3[1]
        year = dateparts2[1]
        if (year.length == 3 || year.length == 5)
            { year = year.substring(1, year.length) }
        if (year.length == 4 && year.substring(0,2) == "20")
            { year = year.substring(2,4) }

        if (month.substring(0,3) == "Jan") { month = "1" }
        if (month.substring(0,3) == "Feb") { month = "2" }
        if (month.substring(0,3) == "Mar") { month = "3" }
        if (month.substring(0,3) == "Apr") { month = "4" }
        if (month.substring(0,3) == "May") { month = "5" }
        if (month.substring(0,3) == "Jun") { month = "6" }
        if (month.substring(0,3) == "Jul") { month = "7" }
        if (month.substring(0,3) == "Aug") { month = "8" }
        if (month.substring(0,3) == "Sep") { month = "9" }
        if (month.substring(0,3) == "Oct") { month = "10" }
        if (month.substring(0,3) == "Nov") { month = "11" }
        if (month.substring(0,3) == "Dec") { month = "12" }

        param2 = month + "/" + day + "/" + year
    }
}

</SCRIPT>

```

**Insert this code in your form to insert the default value for the site requested (<site> parameter).** (You may need to modify the actual <input...> code to match your form's requirements.)

```

Site Requested:
<SCRIPT>
document.write('<input type="text" name="Site_Name" value="' + param1 + '">')
</SCRIPT>
<NOSCRIPT>
<input type="text" name="Site_Name">
</NOSCRIPT>

```

**Insert this code in your form to insert the default value for the arrival date (<date> parameter).** (You may need to modify the actual <input...> code to match your form's requirements.)

```
Arrival Date:
<SCRIPT TYPE="text/javascript">
document.write('<input type="text" name="First_Night" value ='' + param2 + ''>')
</SCRIPT>
<NOSCRIPT>
<input type="text" name="First_Night">
</NOSCRIPT>
(MM/DD/YYYY)
```

## Newsletter #3 (June 2, 2005)

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### Contents

#### **What's New**

- Web form example with parsing rules
- Zip and Postal Code entry

#### **Q & A**

- POS monthly sales reports
- Printing the Rack
- Report with Rate Code
- Will Rates changes affect all reservations
- Free stays show past due
- Rates entry for 7th day free

#### **Feedback**

- Reader Comments - Request for a special flag and check-in notice

#### **Tips & Techniques**

- Keeping a customer deposit or overpayment for future stays

### What's New

#### **Web form example with parsing rules**

We've put together an example of a web form that you could use on your web site, along with the Parsing Rules needed to extract the data form the E-mail you would get when someone fills in the form. This assumes that your web provider has some kind of form script that you can use to handle the HTML "<form>" processing. Of course this is still intended for your web site designer since it will probably require a some modifications for your specific application, but perhaps it will minimize the time needed to set it up.

If you're using the Export to Web function, this example form also includes a fancier (and more foolproof) way to handle the Arrival Date along with the updated Javascript to extract the date parameters accordingly from the vacancy grid links. Instead of a single text entry for the arrival date, it uses month, day, and year drop-down lists with the months spelled out. This should help reduce entry errors and confusion. (Thanks to one of our customers for this idea and sample code.)

The sample form, along with a CSV file with sample parsing rules that would parse that particular form, can be downloaded from our web site. The parsing rules CSV file can be imported to a parsing set through the Edit Parsing Set dialog.

If you're viewing this in PDF (printed) form, you can download these from our web site -- see the "Downloads" link in the menu, and go down to the bottom to locate the "Sample Online Reservation Form" links. Or you can type in the URLs shown below.

You can view or download the sample form here:

<http://www.campground-master.com/zip/sample-res-form.html>

You can also get a CSV file with the parsing rules here: (right-click and select "Save Target As" to save it to your computer without opening it up)

<http://www.campground-master.com/zip/sample-res-form-parsing-rules.csv>

Keep in mind that this is only an example -- since it uses some default values for selections like How-Heard, Rig Type, Site Type, etc, it probably would not be appropriate for any particular park without modification. Your web site designer can use this to start with or get some ideas from, but it needs to be tailored to your particular application before actual use.

## Zip and Postal Code entry

Are you still typing cities and states? We hope not! Remember that you should just enter the Zip/Postal code in the City field (there's no need to move all the way to the Zip field) -- the City, State, Zip, and even the Country will be filled in as soon as you press Tab or Enter. It may take a little getting used to, but it will sure speed up data entry and reduce mistakes.

Note: The new zip/postal code data will only work with the newer version of the software -- and it's installed automatically when you upgrade, so you don't have to do any extra steps.

## Q & A

### POS monthly sales report

**Q: How do I get a monthly report of my POS sales for my accountant?**

Go to the Transactions tab view (on the far right), click Summary Options, select "Monthly" for summarize period, then click the "Filters" button, select "Last Month" from the Dates drop-down, click OK, then click the "Inventory Sales, by Amount" button in Quick Reports.

Of course you can do any date range, this is just an example for last month's sales.

If you want a report of overall sales, not just POS sales, then use the Quick Report "Receipts by Category" or "Charges by Category" (depending on when you want sales recorded -- when they pay or when the charges are applied).

### Printing the Rack

**Q: How can I just print part of the Rack so it's not so tiny (or take so many pages)?**

When printing the Rack, be sure to select the "Show Range" checkbox at the top so it only prints it for the dates you select. Otherwise it will print either very small (if you have the "Fit to Page" printing option selected) or it will print out dozens of pages to include several months' worth.

## Reports with the Rate Code

### **Q: Is there a way to generate a report that includes the rate code and rate description?**

No, those are just for your reference when selecting rates and aren't stored with the transactions.

If you need more detailed reporting than you're getting now, then set up Transaction Categories according to the reporting classifications you need (see Maintenance / Pick Lists), then select the appropriate category in the Charge transaction for each of your Rates. You could have a separate category for each rate if you really wanted to, and it would report those transactions accordingly. Note however that this will not affect any transactions already added to reservations -- only those added from now on.

IMPORTANT -- Don't delete existing Transaction Categories or else any previous transactions using those categories will be corrupted and will not longer report properly!

## Will Rates changes affect all reservations?

### **Q: If I change my rates through Rates Setup, is that going to affect all of my old reservations that used those rates?**

Once a rate is "used" or "added" to a reservation, it just adds the transactions as indicated in the rate without any relation back to the rate definition. So changing rates will not affect any previous transactions, nor will historical reports be affected. You could even delete old rates and add new ones.

However, if you change rates that could still be applied to current reservations (e.g. long-term stays), then if you go back and "auto-calculate" again, it would apply the new rates (and appropriate credits for the old transactions). So if you're changing rates for a new year, it's best to make a copy the rates and include the appropriate dates in "Season Dates Applicable" for each rate. That way it will always know the proper rate to apply for any given time period, whether it's an old reservation or a new one.

## Free stays show past due

### **Q: I am the campground supervisor and reside on site at no cost to me. I did not enter an amount but the program shows 19 days overdue and unpaid days, how do I fix that?**

Go to Reservation Details and check the box by the "Paid-thru" date, making sure the date is the same as the "Last Night" so it considers it paid in full. This is what determines the unpaid days (and the color coding on the Rack).

## Rates entry for 7th day free

### **Q: If someone stays for six days and the seven day is free, how do I show a free day?**

This would generally be the same thing as a weekly rate -- set up a rate that's "per 7 days", and make the charge be the total amount for 6 days. If you're using auto-rates, make sure this rate is \*above\* the daily rate in the list, so if they stay 7 days it will use this 7-day rate instead of 7 daily rates.

For a step-by-step example of weekly rates, see the Rates Setup Examples in the documentation.

## **Feedback**

### **Reader Comments**

One of our customers writes with this request:

**Q:** I would like to be able to red flag a reservation when it is made or sometime thereafter, and then be able to somehow show a red flag warning without going and looking at the customer information. An example: we require people be at least 18 years or older to make a reservation. Occasionally we take a reservation and we are suspicious that they are not 18. When we check them in I would like to see that the reservation has been red flagged so we remember to check their age.

**A:** Version 4.0 will be able to do this (later this year), since it will be open to all kinds of customizations. You will be able to add a flag field and show the reservation in a different color on the Rack based on that field. We also plan to add customizable pop-up notices in the future, which might also be done by version 4.0.

## **Tips & Techniques**

### **Keeping a customer deposit or overpayment for future stays**

Sometimes a customer may cancel a reservation (for a good reason) and want his deposit kept for a later stay, or they might have a credit balance due to an overpayment or bad-weather credit that you want to hold for later.

You should always "zero-out" reservations that are canceled or checked out, and you don't really want to just leave the balance on the reservation where you might forget about it anyway. So the way to handle this is to transfer the reservation deposit or extra payment to the Customer's balance (outside of the reservation). The balance will stay with the customer's record, and when that customer checks in again it will pop up a reminder that they have a credit balance that could be applied to the new reservation.

To transfer a deposit, follow the steps below. For transferring an overpayment that's not a "Deposit" transaction type, use the same steps but use "Transfer Payment" instead of "Transfer Deposit".

1. Bring up the Reservation Transactions for the reservation in question (e.g. New/Edit Transactions).
2. If necessary, clear out or credit back any charges that the customer doesn't owe, so you have the proper credit (negative) balance due.
3. Click "Transfer Dep." (or "Transfer Pmt")
4. It will show the "From" portion at the top with the current reservation information. Leave this as it is.
5. Click "Find Customer" and locate the correct customer record, select it and click "Use" (it will automatically search with the last name to help you out, if you have a recent version of the program).
6. The customer name will be filled in, and also the presumed amount to transfer will be shown. (If the amount is not correct, there may be some charge or Dep Applied transactions still present that are keeping it from being available, or else you need to select the other kind of transfer in step 3.)
7. Change the amount and/or description if desired, then click "Save".
8. A warning will indicate that it's going to the customer, which in this case is OK, so click "Yes".

That's it -- if you transferred the entire amount, the balance should now be \$0 for the reservation. If you go back to the customer's record, though, you'll see that the customer still has the credit balance.

Now when you make a new reservation for them (or when they check in), repeat the steps above -- except that in step 4 you need to change the "From" selection to "To", since you're transferring the amount to the reservation, from the customer.

## Newsletter #4 (June 9, 2005)

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### Contents

#### **What's New**

Open the cash drawer automatically without printing

#### **Feedback**

Receipt printer running slow

Receipt printer not moving paper up far enough

SMTP E-mail error messages

Correcting previous meter readings

Merchandise sales

Changing Additional Notes on the Ticket Form

Reader Comments - sticky notes, requiring fields to be filled in

#### **Tips & Techniques**

Creating a list of customer's E-mails

Copying Campground Master to another computer

### What's New

#### **Open the cash drawer automatically without printing**

Due to popular demand, this new feature was added to the 3.5 release at the last minute. In the Cash Drawer Setup, there's a new option to automatically open the cash drawer as soon as a Payment is entered in Transactions (or Point of Sale). Any change due for a cash payment will also be shown at that time, instead of waiting until the dialog is closed.

You can set this option whether or not you normally print a receipt, or automatically print a receipt.

### Feedback

#### **Receipt printer running slow**

**Q. I have an Epson TM-T88iii receipt printer and it runs slow on your program but fine on my other point of sale program. Any suggestions?**

It sounds like you're running it through a printer driver. If it's a parallel or serial interface (not USB), you can use the "Direct to Port" option so it's faster (see File / Printer Setup / Receipt Printer, Direct to Port). This was added in version 3.1, so if you don't see that option then you need to get the latest version. Once you've enabled that and selected the port for it ("lpt1" for parallel, probably "com1" for serial), then there will be new 3" receipt format listed -- use the "direct to port" one instead of the "fixed pitch" or "proportional" receipt formats.

### Receipt printer not moving paper up far enough

**Q: When I set up the receipt printer to use the direct-to-port printing option, the last two lines of print won't scroll above the cutting bar (unless I press the feed button). How can I get it to automatically scroll up far enough?**

To get it to move up farther, go to Maintenance / Printed notices & text / 3" Receipt printer bottom text, and add some blank links at the bottom of the text. (In older versions, it's under Maintenance / Park Setup).

### SMTP E-mail error messages

**Q. When trying to email a confirmation this is the message: "Couldn't send message! Response:553 sorry, that domain isn't allowed to be relayed thru this MTA (#5.7.1)". How do I fix that?**

(This relates to any similar error response.)

The error is coming from the SMTP server that you're sending mail through, so it's likely to be the Sender address you're using. If you're not a recognized sender for the SMTP server you're using, it may not allow relaying the message. This is to keep spammers from using it from the outside. Especially if it allows sending a test message to yourself (because you're recognized) but not to others, this is likely the problem.

For instance, if you're using an SMTP server from your web provider like "smtp.myparkaddress.com", your Sender E-mail address should be a valid address for your domain, like "info@myparkaddress.com". Likewise, to use an ISP's SMTP server like "mail.earthlink.net" you may have to use your earthlink.net E-mail address for the Sender address.

### Correcting previous meter readings

**Q. When and if I put in the wrong meter reading for a monthly space rental, I can't seem to change it back to the original readings to correct it. Is this an unreversible action or can I change that?**

You can correct it by going into the Site Details for the site -- right-click on the site, select Site Details, and enter the original ("last") reading. Also delete the incorrect charges from the reservation of course. Then you can enter the new reading/charges again.

If you don't know what the original reading was, look at the charges on the reservation before deleting them -- it will show the original reading (and the new one) in the description.

### Merchandise sales

**Q: I have a question on how to adding miscellaneous sales such as golf cart rental, canoe rental, etc. to a person's reservation bill. Can it be handled at check in? If so what are the steps?**

If you do **not** have the Point of Sale option...

When you're at the Reservation Transactions screen (e.g. at check-in), click Select Rates, and then at the top of that select the "Merchandise" item from the Rate Types (assuming you have the items set up in Park Setup / Rates as Merchandise rates). Select an item, enter the Qty if more than one, and click Add. Then click Done and they will be added to their reservation bill.

If you don't have them set up as Merchandise rates, you can enter miscellaneous charges by clicking the Charge button, then select an appropriate category and enter the quantity and amount, also making sure the appropriate box is checked for sales tax, etc.

If you **do** have the Point of Sale option (and the items are set up as Inventory items)....

You can simply click the **P.O.S.** button at the top of [Reservation Transactions](#) to add sales to their reservation bill (e.g. from the Rack, right-click on their name and select "Transactions" to open the Reservation Transactions dialog). Assuming your operator access level is sufficient, you won't have to enter a payment in P.O.S. -- just add the items and click Done. That will take you back to Reservation Transactions and the items will be added to their bill.

## Changing Additional Notes on the Ticket Form

### **Q: How do we change the additional notes on the large reservation receipt (Ticket Form)?**

Go to Maintenance / Park Setup / Parks. It's the Notes 1, 2, and 3 fields there. Press F1 for details on formatting (adding blank lines, etc.). The reason it's in the Park record is so that you could set up different notes for different "Parks" or sections, e.g. one for RV's and another for Cabins.

## Reader Comments

One of our customers writes with this request:

**As a suggestion, a "yellow sticky" or "things to do/check/resolve/be aware of" pop up would be great.**

Our response:

There are plans to add notices like this for reservations (e.g. reminders at check-in), but not necessarily general purpose ones because it wouldn't necessarily know when or where to show them. There are a number of separate sticky-note programs you might look into, usually under \$20, and probably some free ones. Try a search on Google for "sticky-notes software".

Another issue that seems to be coming up quite a bit:

**One issue we are having with the software is people not filling out the reservation forms completely when they take the reservation. In addition, it's hard to tell who made the mistake because multiple people use the computer and it's not convenient to have people log out and back in every time they step up to it. Would it be possible to put a field in the reservation detail where the operator has to enter their code by hand (or else the reservation won't allow "done/save" ) ?**

Our response:

There isn't a way to do this yet, but it should be no problem in version 4.0. We plan to add customizable "validation" functionality so that you can prevent it from saving the reservation unless certain fields are filled in. You could also add a field for the operator's code, but with the validation functionality available the operator code may not be necessary.

## Tips & Techniques

### **Creating a list of customer's E-mails**

As of version 4.3, there is a Customer E-mail List function in the Reports menu.



## Copying Campground Master to another computer

There are a few reasons you may need to copy your entire Campground Master software and data to another computer. Perhaps you bought a new computer, or want a backup on a home computer, or you're adding another computer to the network. In any of these cases, just follow the steps below.

The best way to find current information on this is on our web site, under the Support menu, "Installing on a new computer"

## Newsletter #5 (June 20, 2005)

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### Contents

#### Feedback

Security software conflicts with E-mail and networking

#### Q & A

Missing pages on a report  
Back-dating transactions  
Housekeeping report with names  
Quickly printing window tags for all arrivals

#### Tips & Techniques

Changing Font Size for Reports

### Feedback

#### Networking issues, Norton Firewall

This information came from one of our customers struggling with internet and networking functionality in Campground Master:

**I thought I would let you know how I resolved my problems getting the networking working and also the problem with sending email confirmations.**

**Both issues were caused by my Norton Antivirus/Firewall software. It seems that Norton will scan your outgoing emails as well as incoming emails. The scanning of outgoing emails is incompatible with Campground Master (if the modem disconnects after sending the email). I had to turn that feature off. Also, on my master computer, I had Norton Personal Firewall running which made setting up the network aggravating. Even when I got the network going, the emails still wouldn't work from the master computer. I ended up removing the Firewall program and letting Windows XP do its firewall thing.**

Our response:

The Windows firewall and various "security" programs have been giving people all kinds of problems with networking (blocking the TCP/IP port of Campground Master), but we hadn't heard of it being a problem with sending E-mail.

## **Q & A**

### **Missing pages on a report**

#### **Q. Why does it sometimes not print all pages of a report?**

This is most likely due to changing the printer to Landscape mode just before printing, because the number of pages has already been calculated based on the portrait mode. Printing in landscape mode may require more pages. To use landscape mode, you should set it as the default mode for reports so it knows ahead of time how many pages are required. Go to File / Printer Setup / Default (grid-type reports), and set it to Landscape there. This won't affect receipts, only reports.

### **Back-dating transactions**

#### **Q. How do you enter a payment for a previous day, for instance if it was missed or if it's an after-hours payment that should apply to the previous day's transactions?**

When you enter the payment, e.g. in Reservation Transactions, check the "Details" checkbox near the upper right corner (or in later versions, use the "Show Dates" or "Show Details" checkbox). If you're in the POS dialog, check the Details checkbox as there is no separate Show Date checkbox. This will add more columns to the transactions table -- in version 5.0 or later, the 2nd column is the Date, but in older versions it's the next one after Total. Just click or double-click on that field in the grid and modify the date as needed. Note that the ability to do this with previous transactions is restricted by an access level.

### **Housekeeping report with names**

#### **Q. Is there anyway to get the customer name to come up on the housekeeping report?**

No, but you can get essentially the same thing using the Rack view -- just check the "Show Range" button at the top to see only yesterday and today (or any dates you need to see). Then you can print it out that way.

### **Quickly printing window tags for all arrivals**

#### **Q. How can I sort all of my arrivals so I can have the window tags ready for those who are next to check in, an easier way than by clicking on each one, opening their reservation details, then going to print options.**

A quicker way to do print a bunch of window tags (or any receipt) for people arriving is to use the Arrivals tab view. You can enter the arrival dates you want to print for, right-click and select "Print for all shown reservations", "Reservation receipts". Then select the Window Tag format before printing.

If you're using the ETA field to note estimated arrival time, then you can sort them by ETA on the Arrivals view, but they won't necessarily be printed in that order.

## **Tips & Techniques**

### **Changing Font Size for Reports**

When printing a report, you might have experienced a problem with the font size being so small you can't read it, or way too large. Or you might end up with the report spread over two pages when it could have fit on one page if it used a slightly smaller font.

There are basically 3 settings that affect the font size for reports. All of these settings are in File / Printing Options / Reports.

The Zoom percentage allows you to manually adjust the font size, so you can tweak it if the "normal", or 100% zoom, is a little too small or too large.

However, the zoom percentage is ignored if the option "Fit output to page horizontally" is checked. This is usually what causes the print to be very tiny -- if your report has many columns, it will shrink the text so it fits across the page. There is also a shortcut to turning this on and off right in the File menu.

If you also have "Allow stretching to the full width" checked, then it could cause the font to be excessively large for reports with few columns. This option is not usually desired, it's mainly for special cases.

If you do prefer trying to fit the report across one page for easy reading, then you can select the "Fit to page" option but reduce the number of columns printed. On the Rack view, check the "Show Range" box to limit the columns to the date range you enter. On the other views, you can disable almost any column you don't need printed by clicking the Options button at the top of the report. For other dialog-based reports, for instance in Find Reservations, you can't disable columns but you can shrink them to nothingness by dragging the right side of the column header (you'll see the cursor change to a double arrow when you're in the correct position to drag the column divider).

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## Newsletter #6 (June 30, 2005)

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### Contents

#### **Q & A**

- Show available not showing all available sites
- Showing the year on receipts
- Negative totals for transactions
- Preventing reservations on past dates
- Changing synchronized to non-synchronized

#### **Tips & Techniques**

- Canceling a reservation after check-in
- Using the 'Fill' indicator on maps

#### **Q & A**

##### **Show Available not showing all sites**

**Q: Why don't all available sites show up when I try to change sites?**

A: When you make a reservation, any preferences such as the site type, 50A, etc. are saved with the reservation so that if you need to move them it will remember what kind of site they wanted. In most cases this isn't a problem, but if you do want to move them to a site that's slightly different then it can keep that site from appearing in the list. To correct this, simply uncheck the "Use Preferences" (or "Use Prefs") checkbox on the Assign or Change Site dialog so all available sites show up.

##### **Showing the year on receipts**

**Q: When we print our receipts it doesn't have the year (which our customers need for tax purposes). Can this be added?**

A: Any dates shown on the receipt are formatted according to the Date Format in Maintenance / Program Options / Formats, so you can show the year in the date by changing that format to one of the selections that include the year.

## Negative totals for transactions

### Q: Why under Transactions does the total appear with a negative figure?

If you're talking about the Reservation Transactions dialog, that means a credit balance or credited amount, such as a payment. If you mean the details in the Transactions tab view, this is actually inverted because the totals are calculated as a "system balance" -- Charges will be treated as a negative because they're a "debit" to the system, while payments will show as a positive "credit". So when a subtotal is shown for any given group it can show a balance for that group. For instance if you sort by Site so that it groups and subtotals for each site, you can see whether the charges and payments for that site's reservation are balanced.

## Preventing reservations on past dates

### Q: Is it possible to disable the software from accepting reservations or bookings being done in a past date?

Yes, there is an access level setting you can set to prevent this for operators with non-administrator access. See Maintenance / Park Setup / Access levels, and look for "Create new reservations starting on a prior date".

## Changing synchronized to non-synchronized

### Q: We are having difficulty finding the steps to changing a synchronized reservation to non-synchronized for separate billing....the help content says it is possible; however, we haven't found the steps to accomplish this without canceling the synchronized reservation and re-entering it.

This can be done from the Rack -- locate the linked reservation to be changed to non-sync, right-click on it and go to "Linked Reservations", and you'll see the option there to change it to non-synced.

## Tips & Techniques

### Canceling a reservation that's already checked in

Once you check in a reservation, the normal "Cancel" function on the right-click menu and in Reservation Details is disabled, mainly to prevent accidental cancellation. However there may be times when you need to do this anyway -- perhaps the customer decided they can't stay the night, or perhaps you accidentally checked in a reservation that was a no-show.

This is simple to accomplish, it just takes an extra step:

1. Locate the reservation and get to Reservation Details.
2. Click on the "Checked In" checkbox in the upper right (the only one that's checked and enabled). Confirm the prompt, and they will become Pending again.
3. Now click on the "Cancelled" checkbox to cancel the reservation.

At this point you can negate charges and/or enter a refund as needed, just like any other cancellation where they've already been charged and paid.

## Using a 'Fill' indicator on the map

If you've set up a map you probably know there are 3 types of Site Indicators -- Circle, Rectangle, and Fill. You might have tried the Fill indicator and couldn't get it to work. While the fill type can sometimes be the most attractive, it requires the background image to be very precise. We don't normally provide support on the image editing portion of map setup since it's outside Campground Master, but here are a couple tips that may help if you want to try getting Fill to work.

This idea behind a fill indicator is to fill up the site with the status color no matter what its shape, so you're not restricted to rectangular sites on a map -- think of it as pouring a bucket of paint on the site -- it will flow outward until it reaches a border of some kind, so it becomes the exact shape of the site.

The concept is simple enough, but in practice it can be a little tricky since it requires the image to be "perfectly flat" color-wise for the area you want to fill. Any slight variation in the color value will act like a border for the fill. Even though you can't visually see any difference in the color, a "white" background can actually contain many different almost-white colors as far as the computer is concerned. So you might end up with an oddly shaped fill, or maybe even just a single dot.

Another type of problem occurs if the image is flat enough but the site has a "leak" -- any gap in the border will allow the fill to get outside the site, possibly filling the whole map.

These problems can be corrected using an image editing program like Paint Shop Pro to edit the image. It has simple tools you can use to "flatten out" the color and close any leaks in the sites.

If your map image is basically black and white, then the easiest way to flatten it out is to convert it to a 2-color image (using the "Decrease color depth" function in Paint Shop Pro) which will flatten it to absolute black and white, then increase the color depth back to 256 colors for saving the BMP file (using "Increase color depth").

If instead of a black and white map you have various coloring you want to keep, then you can use Paint Shop Pro's "Color replacer" tool with a suitable Tolerance value, perhaps 10 or so. For instance this can replace everything "close" to white with a solid white so that the Fill indicator works. Once the tool tolerance option, size, and color is set, just move it around on top of the sites to flatten out the color.

Finally, inspect each site's border for leaks -- close any gaps using a small paint brush tool.

The specific functions mentioned above are for the Paint Shop Pro software which we recommend, however any good image editing software should have equivalent tools. And by the way, Paint Shop Pro does a much better job of resizing images than the Windows Paint program (which often results in a very rough image).

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## Newsletter #7 (July 11, 2005)

### Contents

#### **Q & A**

- Entering laundry or other misc. receipts
- Multiple groups on one site
- Speeding up check-outs with transactions

#### **Tips & Techniques**

- Printer Recommendations
- Tips of the Day

## **Q & A**

### **Entering laundry or other misc. receipts**

**Q: We collect the laundry machine money which goes into our register as non taxable merchandise. How do I enter this in Campground Master so our cash drawer balances, without doing a fake reservation or customer for it?**

A: You can use "Unbound Transactions" for this, which are generally for merchandise sales without customer information.

For instance, click on the cash register icon to open Unbound Transactions (or go through the Transactions menu if you have the POS option). Then instead of selecting a rate, just click "Charge", pick a category and enter the amount. (You can add a category for "Laundry" in the Transaction Category Pick List if necessary.) Then also enter a Payment of cash for the same amount (so the total balance due is \$0).

That will show the cash in the register, and also a "charge" in the proper income category, when you do your reports.

### **Multiple groups on one site**

**Q: We often book a second unit into our larger sites if groups want to camp together. The program won't allow us to accept a second booking into the same site with the first group, so how can we do this? Also, we charge a lesser rate for the second vehicle.**

A: The Guest reservation type would work for this, since this type is used for additional guests on the same site -- see "Guest Management" under the Reservation Details, or "Add a Guest" when you right-click on the reservation in the Rack. If you already use "Guest" for other things, then you can create a separate reservation type such as "2nd unit" that also works like Guests as far as double-booking the site (see Pick Lists / Reservation Types, and add a type with "Guest" as the base type).

Since it's now a separate reservation type, you can also set up the separate rates accordingly. Add a rate definition and select the appropriate Resv Type for it to apply to, so it's only used for the guest or 2nd unit reservations.

### **Speeding up check-outs with transactions**

**Q: When someone leaves our park we need to go to Transactions to refund a key deposit, then we have to get back to the reservation to check them out. Is there a way to streamline this?**

A: There are a couple ways to make this easier.

1. While doing the transaction, click on Reservation Details, then check the "Checked Out" checkbox in the upper right. This will perform the checkout function while you're still working on the transactions -- Save will take you back to Transactions so you can finish up there.

Also, if you forget to do it before closing Transactions, just press Ctrl-R on the keyboard to open Reservation Details for the reservation you were just working with.

2. Reverse the actions -- instead of going to transactions first, do the Check Out function first. This will automatically open the Transactions dialog so you can do the key refund, if you have the appropriate Prompt option selected. See Maintenance / Program Options / Prompts, and set the "Checking out with no balance due..." option in the "Open a Transactions dialog when" section.

## **Tips & Techniques**

### **Printer Recommendations**

In an ideal world, every printer would work as advertised and work perfectly with Windows. Unfortunately, there are some that don't quite work in all situations.

This is usually a problem with the "driver", which is the piece of software that's used when an application (like Campground Master) sends a formatted page to the printer through Windows. Drivers have been a continual problem for Windows users -- they can have bugs that cause a crash when printing, lock up Windows, or just don't create the output as expected. If you experience a problem related to printing, the first thing you should do is go to the printer manufacturer's web site and see if they have an updated driver for your printer.

In our experience, Hewlett Packard still makes the best printers and has the most compatible and bug-free drivers (they have the money to fund expert development, and very good history and experience). Epson is also one of the better ones, but we've always felt that their printers aren't quite as robust. So our primary recommendation is always Hewlett Packard.

One brand in particular that we suggest you avoid is Lexmark. Their drivers are notoriously buggy, and we had to program a work-around to avoid one of their major bugs. Some newer Lexmark drivers have more problems of not showing the proper output (blank areas on receipts, for instance). At this point we cannot guarantee that printed output will be correct on Lexmark printers.

### **Tips of the Day**

Have you read all of the Tips of the Day? Do you remember them?

It only takes a few seconds to read a tip each time you start the program. You may not understand all of them or they may not apply to you now, but if you leave them on and let them keep cycling through, they will eventually be useful.

We know it's easy and tempting to disable them, but it's surprising how many support questions we get that are answered in the Tips. Also remember that each new version has a few more tips about the new features.

If you don't see the tip when you start up, you can re-enabled them. Assuming you have version 3.0 or later (and if you don't, you really should upgrade to it!), go to the Help menu and select "Show Tips on Startup". If you have some time and want to browse through a few any time, just select "Show Tips Now" from the Help menu.

## **Newsletter #8 (July 21, 2005)**

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### **Contents**

#### **Q & A**

- Hiding some sites from the Rack
- Fixing a checked out reservation
- Find and fix reservations with missing How Heard information

#### **Tips & Techniques**

- Creating split reservations on separate sites
- Reporting the amount of taxable sales and tax collected

## **Q & A**

### **Hiding some sites from the Rack**

**Q: My seasonals are at the top of the Rack and On Site views because they are the lower numbers, so I have to scroll every time to get to the daily sites. How can I hide them until I need them since they're not very active?**

A: Technically you could just move the seasonal sites down below the others, since they don't technically have to be in numerical order. (See Newsletter #1 for help rearranging sites on the Rack.) However if you don't want them shown at all, there's another way. You can set up a "default filter" for the Rack view and the other views so that it only shows the sites you want to see most of the time.

To do this, drop down the "All Site Types" list at the top of the view, and select "Default ..." at the very bottom of the list. This will show a site filter where you can choose which sites (or types, or classes, etc) you want to see normally.

Once this default is set, it will be used instead of "All" site types whenever you use the Reset / Today button. If you do want to see something different, drop down the list to pick the site type, etc. you want to see.

Note that for networked systems, this default filter is separate for each workstation. This allows you to set up different views for different locations, but you will need to set up the default filter for each workstation.

### **Fixing a checked out reservation**

**Q: I have a reservation that's in Dark Grey on the Rack (checked out) but he's still here, and I can't get him in the Green as all paid up. How do I fix this?**

A: You can undo the check-out so it's checked in again. Just go to its Reservation Details, and click on the "Checked In" checkbox in the upper right Status area. This will undo the checkout and change him to Checked In.

This same procedure can be used if someone was checked out in the system but has decided stay longer. After you undo the check-out, you can change the Last Night appropriately.

### **Find and fix reservations with missing How-Heard info**

**Q. I don't like to leave the How-heard information blank on reservations, but sometimes my staff forgets to enter it. Is there an way to force this to be entered, or at least an easy way to find the ones that don't have it?**

We'll be allowing compulsory fields later, but in the meantime here's an easy way to find the missing ones:

1. Go to Reservations / Find Reservation (or just press Ctrl-F)
2. Click the "Reservation Filtering" button.
3. In the How Heard list in the lower left, select "(Unknown)" -- it's at the bottom of the list.
4. Uncheck both the "Filter by date" and "Filter by" boxes.

That should list all reservations missing the How Heard -- double-click each one to get to Reservation Details and fill in the How-Heard field.

Before closing the Find Reservation dialog, you might want to check the "Filter by" box again so it doesn't waste time showing all reservations next time you open it.



## **Tips & Techniques**

### **Creating split reservations on separate sites**

Once in awhile you may have to move someone to a different site in the middle of their stay, either at their request or because there are no sites open for their whole stay.

For a requested move in the middle of their stay, you can split an existing reservation from the Rack view (right-click on the date to start the split), and then change the site assignment for the second part.

But if you need to split the reservation to start with (because the site isn't available for their whole stay), there's another way to do it. You can start by making a reservation for the first part, then add a linked sub-member reservation for the second part. You can do this all at once while still in New Reservation by following this procedure:

- Start the new reservation.
- Select the dates for the first part and pick the site (so the site shows in "Site(s) added" as usual.
- Check the "Sub-member of" box below the grid (instead of "synchronized").
- Change the dates for the second part,
- Select the other site. It will show in "Site(s) added" with a ">" in front of it.
- Complete the reservation as usual.

This will create two linked reservations, which will be billed together.

One thing that this doesn't solve is that auto-rates won't treat them as a continuous stay -- for instance if they stay 3 days on one site and 4 on the other, it won't give them the weekly rate because it's not a continuous stay in the same reservation. In this case you would have to manually give them an appropriate discount, or override the auto-rates to select the weekly rate (in Reservation Details, check "Disable auto-rate recalculations" if necessary).

### **Reporting the amount of taxable sales and tax collected**

**NOTE: This information has been updated and added to the documentation under Taxes Setup (<https://campgroundmaster.com/help/taxessetup.html>). Refer to that for current information.**

Original article:

Most businesses need to fill out a quarterly sales tax report for your state (or similar reporting for other taxes). For these reports you need to find the amount of sales tax collected and the amount of sales revenue that was taxed.

Assuming that you're using the tax categories and auto-tax calculations as designed in the software (as opposed to including tax in your prices to make them even dollar amounts), getting the amount of sales tax collected is easy:

- Click on the Transactions tab view.
- Click the "Summary Options" button (if you don't see Summary Options, check the Summarize box first),
- If you report based on when they're collected (paid to you), click the "Receipts by Category" button under Quick Reports. Otherwise, if you need to report based on when they are charged to the customer (whether paid or not), click the "Charges by Category" button.
- Click "Summary Options" again.
- Select the "Quarterly" option in the Summarize period group.
- Click the "Filter..." button and select the appropriate From and To dates for the quarter, then click OK.
- Click OK again.

Along with all other Transaction Categories, this will show the actual amount of tax income for the quarter, for each tax category you use (e.g. Sales Tax, Hotel Tax, etc).

Campground Master doesn't specifically flag each charge transaction as to whether it's taxable or not, so to get the amount of sales taxed then you may need to reverse-calculate it. For instance if your tax rate is 5% and the tax collected is \$100, then the amount taxed would be  $\$100 / .05 = \$2000$ .

#### **Alternate method:**

You can also set up the Transaction Categories to make it easier to get the amount taxed. Ideally you want to make sure that any taxable charges go in separate categories from non-taxable ones. Here are a couple ways you can do this:

In the simplest case, perhaps Daily and Weekly rates are taxed but Monthly rates are not -- so you can just add the daily and weekly charges and leave out Monthly. You might even want to add a "T" in front of the categories that are taxed.

If the division is not quite as clear, for instance if some daily stays are non-taxed due to government-employee discounts, then you could add a "Daily non-taxed" category for this. Be sure to set up your Rates so that the correct category is used for taxed vs. non-taxed rates.

Keep in mind that most Discounts are pre-tax, so those need to be subtracted from the taxable Charges for calculate the amount taxed. Again, if some discounts apply to non-taxed categories, then you can make a separate category for non-taxed discounts. Or better yet, avoid using the generic "Discount" category for discounts and always select the appropriate category when a discount is entered (or set up in a Rate), e.g. use the Daily rate category if it's a discount off of the daily rate.

## **Newsletter #9 (Aug 1, 2005)**

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### **Contents**

#### **Q & A**

- Checking out early (without a refund)
- Entering credit card information without a payment
- Entering credit card security codes (CVV2 or CVC)

#### **Tips & Techniques**

- Printing a report of reservations made each day
- Making multiple dates unavailable at once

### **Q & A**

#### **Checking out early (without a refund)**

**Q. Is there a way to do post an early check-out who does not get a refund for leaving early? If I try to check them out on the day they leave, the program wants to make the day they are leaving the actual check-out day.**

**A:** The program wants to show them checked out on the day they actually leave so the site is open for new visitors if necessary and your reservation data is accurate. The best way to do this is to adjust the "Last Night" first (through Reservation Details, or by right-clicking them on the previous date on the Rack and using "This is new last date"). Then do the check-out and it won't complain about the date.

However if you're using auto-rates, the other issue is keeping it from adjusting charges (removing 1 or more days rent) when you change the date. To avoid the adjustments, go into Reservation Details \*before\* changing the Last Night and check the box "Disable automatic rate re-calculations".

### **Entering credit card information without a payment**

**Q: How do I record a customer's credit card details without actually entering a Payment transaction (we get this information when they make a reservation in case we need to charge a cancellation fee).**

A: This is what the "Guarantee" function is used for in Campground Master. When you Guarantee a reservation, it will show an entry dialog for all of the credit card information (and other notes if necessary). If you don't actually do the Guarantee step, you can also enter this information through Reservation Details -- click on the small "..." button at the end of the Guarantee Info field to get the individual credit card entry fields.

### **Entering the credit card security code (CVV2 or CVC)**

**Q: When I enter credit card details, is there a way I can also enter the CVC code from the back of their card?**

A: Yes, there is an option you can enable so it will show a CVC/CVV2 entry box when it prompts for other credit card details on Payments. However, PCI compliance rules state that the CVV or CVC security codes cannot be stored on a computer. Therefore, as of version 6.0 this option is only available if you're processing cards through Campground Master (the CVC code is sent for processing and immediately discarded).

## **Tips & Techniques**

### **Printing a report of reservations made each day**

Most of the reports show reservations based on the reservation start or end dates, rather than the date it was made. Campground Master does track the date a reservation is made, so it's possible to print a list of reservations made on a certain date -- for instance at the end of the day you can print a list of all reservations made that day.

You can do this using the Find Reservation function:

1. Go to Reservations / Find Reservation (or press Ctrl-F).
2. Check "Filter by date", and select "Date Resv made".
3. Make sure the "From" date is what you want (the "To" date can be in the future -- it won't hurt anything if you're just wanting "today's" reservations).
4. Uncheck the "Filter by" box. Now it should show all reservations made today (or whatever dates are selected).
5. Click "Print list" to print it out.

Note: If there are some columns you don't need printed, you can shrink a column to nothing by dragging the right edge of its column header over to the left.

Also note: The "Filter by" and "Filter by date" checkbox selections will be remembered the next time you open Find Reservation. So you may want to put them back the way you normally use them before closing the dialog.

### **Making multiple dates unavailable at once**

The "Make site unavailable this date" function on the Rack's right-click menu is handy for single dates, but there may be times when you want to block many days in a row. Instead of a lot of right-clicking, there is an easier way to do this.

To block multiple nights at once:

1. Right-click on the site.
2. Select Site Details.
3. Add the dates to the Special Dates Unavailable field as a range. For instance, "7/3/05 to 7/10/05".
4. Click Save.

Note: If other dates already exist in that field, add the range to the end (with a comma before it). If there are a lot of dates in the field already, click to put the text cursor in the field and press the **End** key to get to the end. It will scroll as needed when you type in the new date range.

While you're in there, you should also clear out any dates that are already in the past. It will help speed things up.

Tip: If you need to do this for multiple sites, don't forget you can copy/paste text. Select/highlight the date range after you type it for the first site and press Ctrl-C to copy it. Then get to the Site Details for the next site (the "Next" button in Site Details can be handy for this if they're consecutive sites), put the cursor where it's needed, and Ctrl-V to paste. If you're new to copy/paste, this may take a few tries to get used to the sequence.

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## **Newsletter #10 (Aug 11, 2005)**

### **Contents**

#### **Q & A**

- Showing all transactions by an operator
- Changing the colored weekend columns on the Rack
- Showing the unpaid status on Map indicators
- Changing the default reservation type
- Handling non-site rentals like storage

#### **Tips & Techniques**

- Recovering from a corrupt or missing database

## **Q & A**

### **Showing all transactions an operator made**

**Q: How do I view all the transactions a particular operator made overnight?**

A: In the Transactions tab view:

1. Click on More Filters.
2. Click "Reset Filtering (include all)" to clear any previous filtering, then click on the operator name in the Operators list at the bottom.
3. Click "OK".

That will show all transactions by that operator for the date(s) selected. (If the "Summarize" checkbox is checked, you also need to uncheck that.)

### **Changing the colored weekend columns**

**Q: Is there a way I could change the weekend "blue" columns from Saturday & Sunday to Friday & Saturday?**

A: Go to View / Color key for reservations. You can change each day of the week to whatever color you want (right-click on the entry to select a different background color).

### **Showing the unpaid status on Map indicators**

**Q: The Rack shows a name in red if they haven't paid. Can I show that on the Map also?**

A: Yes, it will show the site number and border (if applicable) in red text if you select the option to "Use reservation color coding" (click the Options button on the Map view to change this). Of course that will also change the other status colors to all use the same coloring as the Rack uses also, which may or may not be desired.

### **Changing the default reservation type**

**Q: Most of our reservations are Monthly but I keep forgetting to change that when I make a reservation. Can I change the default type for new reservations?**

A: Yes, you can set the default type for new reservations in Maintenance / Program Options / Reservations (in newer versions, you also have to click on the "Reservation Default Values..." button.). Of course for reservations already made you can also fix the type of each reservation in its Reservation Details (just select the new type, under the site name).

## Handling non-site rentals like storage

**Q: What is the best way to log storage? We don't have site #'s for it.**

A: If you want to treat them like reservations, with rates, receipts, reporting, etc., then they need to be on Sites. You can just put in a bunch of storage "sites", for instance numbered S1 to S100, and just use the next available storage site for each one you add.

You can add any number of sequentially numbered sites in a single step using the "Add/Insert Multiple Sites" function in Maintenance / Park Setup / Sites (or if you're not using version 3.5 yet, this function is in Maintenance / Raw Data Tables / Sites). We recommend that you add the first one in the normal way so you can set its Type, Class, Park, and other attributes, and then use the multiple-sites function to clone it as many times as needed with sequential numbers starting at # 2.

## Tips & Techniques

### Recovering from a corrupt or missing database

If you get a message when starting up that the database cannot be found, or that it's corrupt and cannot be read, or if the Rack is completely blank, the first reaction is to panic. This kind of error is usually caused by a power outage or computer glitch at just the wrong time, which causes the database to not be saved completely. But unless you're using a very old version (before 2.0), then you can probably recover easily without losing anything.

There are simply too many possible variations in circumstance to show a simple step-by-step recovery procedure, but the guidelines below should get you through it easily enough.

### Opening Campground Master

First you need to get Campground Master open and stable so you can use the Restore function if necessary.

If it says that no database has been defined, do NOT select the option to open the sample database. Just let it open a blank database. Then continue to the "No Database Defined" section below to try opening your database.

If it opens with a blank Rack, or if it shows one error message saying something like "database is corrupt" or "invalid database" and clicking OK brings you to a blank Rack or a login window, then continue to the next section. (If your normal login doesn't work, use "Administrator" and "Password".)

If you get a prompt saying that a recent auto-backup was found and asking if you want to restore from that, answer YES! You're in luck and may be back up and running.

If it shows a continuous stream of data error message prompts that don't stop after several messages, then close down (Ctrl-Alt-Delete and use End Task to terminate the program) and start over, opening the Demo database instead. (If you've removed the demo icon from the desktop, go to Start / Programs / Campground Master and open the Sample database.) Once the demo is open, use the Maintenance / New Database function to clear everything out -- if it asks for a name, try to enter exactly the same database name you used before. If it says the database already exists, that's OK -- that's the corrupt one anyway so you might as well clear it out. Once you have a blank database open, skip to the "Do you have a removable backup..." section below.

### No Database Defined, or a blank Rack?

If it says that no database has been defined, or if it opens with a blank Rack, then it could simply be that it lost track of which database it was supposed to open. Use File / Open Previous Database and see if any previous databases are listed, or File / Open, to see if you can find your database file. The folder "C:\Users\Public\Documents\Campground Master\" is the most likely location for Windows Vista and Windows 7 or later, or "Shared Documents" for Windows XP, or "C:\Program Files\Campground Master" for Windows 95, ME, 98 and 2000. If all else fails, use the Find Files or Search function in Windows (from the Start button), and look for files named \*.prk (include the asterisk and the period). If it finds one (other than "demo.prk") and it looks like your database (check the modified date -- is it recent?), make a note of its location and then use File / Open again to open it. Otherwise, continue with the steps below.

**Important:** Do NOT open a database named "database.prk" that's inside a .zip file (that's a compressed backup, and will show a zippered folder instead of a normal folder icon). If this is the only database you can locate, then you should use the Restore function covered below.

If you can't find your database or it's still blank, then keep reading...

### Do you have a removable backup, e.g. on floppy or CD?

Ideally you're making daily backups to a removable disk (if not, YOU SHOULD), in which case it's a simple matter of using the Maintenance / Restore from backup function to restore the database. Just follow the prompts, locate the backup file on the removable disk when you get to the Open dialog, and open that file.

**Important:** After restoring the database backup, if it didn't prompt you to use the same last database file, then be sure to use File / Save As to save it to the correct location on your hard drive, with the correct name. When you get to the Save As dialog, double-check the "Save In" location -- we recommend that you put it in "C:\Users\Public\Documents\Campground Master\" for Windows Vista and Windows 7 or later.

If you're using a version older than 3.1, you should immediately close Campground Master and re-open it after doing the Save As step. This will force it to check for changes in the log files that didn't get in the backup, and those can be restored also. If you're using 3.1 or later, it should prompt you to "Apply changes" after you do the Save As step (click 'Yes' when it does).

Note: In order to recover changes made since the backup, the database must be saved in the same location that was used before, and must use the same filename. If you don't remember where it was saved and it's not in the path mentioned above, you could check Maintenance / Program Options / Database to see if it shows the auto-open path.

### What if you don't have a backup handy?

There's still hope, if you're using a recent version. The program makes daily auto-backups which should still be there. These are placed in the same folder as your database (usually in "C:\Users\Public\Documents\Campground Master\" for Windows Vista and Windows 7 or later, or "Shared Documents" for Windows XP, or "C:\Program Files\Campground Master" for Windows 95, ME, 98 and 2000). So try using the Maintenance / Restore function, and when it gets to the Open dialog then navigate the Look In drop-down list to that location (select the disk under My Computer that shows "(C:)"), then double-click the Program Files folder, then double-click the Campground Master folder).

Now you should see a whole bunch of files that start with your database name and then have "\_Auto\_Backup\_" and a date in the name (make sure the Files of Type shows "Compressed backup (\*.zip)"). Locate the one with the latest date in the filename, select it and click Open. If it's still blank, then that means the one you opened was an auto-backup of the blank database you already have open -- so look for the Auto-Backup with next most recent date and try that one.

If you didn't see these auto-backup files in that location, then you may have been saving your database somewhere else. If you don't remember where it was saved, you could check Maintenance / Program Options / Database and see if it shows the auto-open path. If all else fails, use the Find Files function in Windows (from the Start button), and look for files named \*\_Auto\_Backup\_\* (include the asterisks, those are wild-card characters).

### **What if it's on a networked computer?**

If the problem is on only one computer in a networked setup (even if it's the "master"), then you can also just make a fresh backup from one of the other computers and restore it to the corrupted one. Be sure to save it using the same database name as the other workstations use, or else it won't be able to connect to the server.

### **Making sure it continues to open the correct database**

Once you have your data is restored and you've verified that it's as good as can be expected, then there may be a couple more steps to make sure it opens this database automatically. This is especially true for version 3.5 or later, but in any case you should follow this procedure (making sure you're logged in as an administrator):

1. Make sure the database is in the correct location -- use Maintenance / Database Maintenance / Move the database to shared or public documents. This will move it if necessary.
2. Make sure the name is reasonable -- it's shown in the caption bar, after the word "Database:". If it just shows "Database:Database", or something like "July 2022", then that's not a reasonable name for your data. Use File / Rename database to change it.
3. Go to Maintenance / Program Options / Database. If there's a large button "Change the auto-open database..." underneath the auto-open database file and path, then click that button. (This will only be there for version 3.5 and later.)

Hopefully the procedures above will get your data restored. If you have any problems, please contact us.

## **Newsletter #11 (Aug 22, 2005)**

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- Adding notes to the Ticket Form receipt
- Adding E-mail and phone information to receipts
- Showing longer names on the Rack
- Allowing clerks to refund partial stays

#### **Tips & Techniques**

- Increasing rates for next year



## **Q & A**

### **Adding notes to the Ticket Form receipt**

**Q: How do I add "Additional Notes" to the Ticket Forms, like I see when I print them from the demo?**

A: These are set up in an unusual place, in part for backward compatibility with the original version and in part because it allows some extra flexibility.

To add additional notes to the ticket form receipts, which will appear on the left side below the company information, go to Maintenance / Park Setup / Parks. There are 3 fields, Notes 1, Notes 2 and Notes 3. Whatever you enter in those fields will appear as "Additional Notes".

Since this is in the Park record, you have the ability to show different notes for different parks (if you have more than one Park set up).

For more information regarding the format of the notes (e.g. how to insert blank lines), see the Help -- press F1 when you have the Park Setup window open, and scroll to the bottom for Notes help.

### **Adding E-mail and phone information to receipts**

**Q: How can I show our E-mail address, web site, and additional phone numbers on our receipts?**

A: Any of this information that you enter in the Park record fields will show on receipts (see Maintenance / Park Setup / Parks). It will also show the "Owner" field, which could be anything you want, for instance "Managed by the Smiths".

### **Showing longer names on the Rack**

**Q: Some customer names don't fit on the Rack, so it just shows part of it with "..." at the end. How can I get them to fit?**

A: You can make the Rack's grid cells larger -- Click the Options button at the top of the Rack, and enter a larger number in the Cell Width field. Of course the wider you make them, the fewer days you'll be able to see at once. Also note that the full name is shown as a pop-up tip when you put the mouse over a name, so it's not necessary to make the cells large enough to show any possible name.

### **Allowing clerks to refund partial stays**

**Q: When there is a need to back out a charge from the Transaction screen, and I need to select the rate and use a negative number in the "days" field to balance it out, it gives an error that I'm not authorized to enter negative charges. It only does this for the "Reservation" level operator logins, not the "Administrator". Which access level setting needs to be adjusted to allow anyone to do this?**

A: This is the access level "Enter negative amounts for charges or payments" (because the negative rate days results in negative charges). Go to Maintenance / Park Setup / Access Levels and look for that item. Double-click on it and set the override level to "Reservations".

## **Tips & Techniques**

### **Increasing rates for next year**

(This article assumes that you have Rates set up for your rental charges rather than entering all charges manually, and in particular applies if you use Auto-rates).

At some point you're probably going to want to increase your rates for the next year. If you're already taking reservations for next year then you want to make sure that quotes and confirmation letters show next year's rates, not this year's. But of course you can't just change the amounts in your Rates definitions because that would charge the new rates to people staying this year also.

Basically what you need to do is enter all new rate definitions for next year's rates, while keeping this year's rates in the system. While this sounds like a tedious project, there are a couple tricks to doing it easily and quickly. Here is the process we recommend:

1. Go to Maintenance / Park Setup / Rates.
2. Select ALL of the rates that need to be increased (Ctrl-click on each one, to select multiple rates). You don't need to select every rate, but you should copy all associated rates even if some of them won't change, to avoid confusion (e.g. if only the daily rate is increasing, then copy the weekly and monthly rates also if they would apply to the same sites).
3. Click "Copy Selected Rates". This will create a copy of each rate and add it to the end of the rates list.
4. Select the first of the copied rates and "Edit rate definition" (or better yet, just double-click on the rate to edit it).
5. Add something like "2006" to the Description so you know it's next year's rate.
6. Adjust the "Each" amount for the charges as needed.
7. Enter next year's season into "Season Dates Applicable" so that this rate only applies to reservations for next year. This should be entered in a form similar to "4/1/06 to 10/31/06". (Canadian data formats may be reversed like "1/4/06 to 31/10/06".) Of course if you already have specific dates in this field, e.g. holiday dates, these need to be altered appropriately.
8. (optional) Highlight the season date range entered and press Ctrl-C to copy the text, so you don't have to type them over and over.
9. Click Save.
10. Repeat steps 4 through 9 for each of the other copied rates for next year. You can use Ctrl-V to paste the season dates into the other rates, if you copied them in step 8.
11. Now you need to move these new rates to the top of the list so they are checked \*before\* the default (current) rates. Select each of the copied/modified rates, and click "Move Up" until they're above the normal rates. Note: If you didn't copy and modify all rates, some inter-mingling may be required for it to work properly. Just keep in mind the ordering rules for auto-rates (see the documentation for details).

Now it should correctly use the new rates for next year's reservations. Keep in mind that next year you will need to either update the season dates (e.g. to extend the rates to 2007, 2008, etc) so they work for later years, or else repeat the process for each year's rates increases. We don't recommend deleting the old rates later, because that could cause old reservations to re-calculate if you do any changes to them later, especially long-term stays. In fact, setting the Season Dates for old rates to be more specific might help avoid problems of using the wrong rates.

## Newsletter #12 (Sept 10, 2005)

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#### **Q & A**

- Reporting annual receipts
- Reporting the amount received for each site
- Showing detailed transaction amounts for reports
- Changing the Check-In and Check-Out times
- Adding printed memos to Auto-Rates
- Auto-printing POS receipts only for credit card sales

#### **Tips & Techniques**

- Using a network client offline for extended periods
- Printing single labels on a Dymo label printer

#### **Miscellaneous**

- Is your park Satellite Friendly?

### Q & A

#### **Reporting annual receipts**

**Q: I need to show receipts for last year receipts for this year. How do I go about it?**

A: On the Transactions tab view (the far right tab), go to Summary Options and click the "Receipts by Payment Method" button. Then go back to Summary Options and select "Yearly" for the Summ-by. Then go to More Filters, and select either "This Year" or "Last Year" from the Dates list (or any custom dates if you prefer).

If you prefer to view the receipts according to the income category, use "Receipts by Category" instead (version 3.5 recommended, earlier versions did not have this report or did not report it in the correct categories some times, since it's an interpolated report).

## Reporting the amount received for each site

**Q: Is it possible to pull up a report that gives the amount taken in for each site?**

A: On the Transactions tab view, drop down the "All Tran Types" list and select "All Charges". Then click Summary Options and select the "Site" option under Group Total for Each..., and check the option to "Show charges & expenses as positive values". If desired, also select a different Summarize period (e.g. if you need it monthly instead of daily). Click OK, and then change the dates at the top as needed.

Note that this will include ALL reservation charges on each site -- if you need to exclude some items like tax, propane, and other misc. sales, go to More Filters and select only the Categories of interest.

If you really need to show the amounts received (payments and deposits) by site, then you can select "All Receipts" from the list at the top instead of "All Charges".

Also note that this will report the amounts according to the date that the charges (or deposits & payments) were entered -- so if you add charges when they make the reservation instead of when they check in, for instance, then it may not be representative of their actual stay. One way to correct this is to go into More Filters and check "Use Reservation date instead of Transaction date". Now it will report the charges according to the starting date of the reservation. (However, this can cause problems for long-term guests.)

## Showing detailed transaction amounts for reports

**Q: I was doing a tax report for the month and I'm not sure it's correct. How do I go about finding the actual dollar amounts per guest?**

A: Uncheck the "Summarize" checkbox at the top of the report to see the details (all transactions included in the report will be shown). In general this is a good way to double-check what's included in a report, or to investigate questionable numbers.

## Changing the Check-In and Check-Out Times

**Q: How do I change the check-out time (shown on the receipts) from 1:00 PM to 11:00 AM ?**

A: That's changed in the Park record, through Maintenance / Park Setup / Parks.

If you have multiple parks defined then they can have separate check-in and/or check-out times. This can be useful if you have different times for cabins than for RV sites, for instance. You can Add another park record (being sure to copy ALL fields exactly including the Authorization Code), then change the "Short name" for identification purposes (e.g. "Cabins"), then set the check in/out times accordingly. Finally, go to the Sites setup and select the appropriate Park for each site that should be part of the new "park".

UPDATE -- In later versions, it's also possible to override the times for each site individually. Refer to the documentation for Site Setup for details.

### **Adding printed memos to Auto-Rates**

**Q: We would like to build a memo into our monthly and weekly rates. I can add the memo easily enough on the rate set-up but it does not print out on the invoice. Is there any way to make the memo print out?**

A: Yes, assuming you have a recent enough version (version 3.5 is required for this).

In the Rates Setup, Edit the rate and click on the Category of the memo transaction (on the word "Memo" under the Category column). A drop-down arrow will appear -- click the arrow and select "Print Memo" for the category. This will also change the Type, and the memo added with this rate will now print on receipts.

### **Auto-printing POS receipts only for credit card sales**

**Q: We need to have the printer only print receipts automatically when a credit card is used, not for cash sales. Can I do this?**

A: In Maintenance / Program Options / POS, underneath "Automatically print receipt...", check the option "only if it's a credit card payment". If you don't see that option, you may need to upgrade to v3.5.

(This only applies to the POS option, since there isn't an auto-print function for non-POS receipts.)

## **Tips & Techniques**

### **Using a network client offline for extended periods**

With the summer season coming to an end for many parks, we're getting questions about taking a computer "offline" to use during the winter for reservations. If you only use one computer (or don't use networking and need to just copy the database back and forth between the main computer and a laptop), then this is a simple matter of using the Backup and Restore functions to transfer the database when needed.

However there is a special consideration if you're using the networking functionality and your laptop (or whatever computer you'll be using "offline" for an extended period) is a client on the network instead of the Master.

You can either make the laptop act as the Master while you're disconnected or select the "Work Offline" option under Network Functions (which would have to be done each time you use it), but the main thing is to avoid changing "This workstation's ID" of a workstation -- this would cause problems with synchronizing data later, so avoid changing this for any reason.

The recommended procedure would be to go into the Network Setup and change the "Master (server) workstation ID" to match "This workstation's ID" (e.g. '2'). Now it won't need to connect with the old master since it's considered a master itself. of course, be sure that all computers are synchronized and up to date before doing this, and avoid using the other computers again until you're ready to connect back up as described below.

When you're ready to connect back to the original master, first make a Backup from the laptop BEFORE connecting back up to the server (otherwise all of your new data could be lost), and use the Restore function to restore the backup to the server. Then go back into Network Setup on the laptop and change the Master's ID back to 0 (or whatever it was before), and it should connect to the original master as usual.

If you don't have a way to transfer a backup from the laptop to the original master, then an alternative would be to change the Network Setup of ALL of the computers so that the laptop is the new master (e.g. change the "Master ID" on all of them to '2' so they connect with the laptop -- and you will also need to change the Master's IP address to the laptop's IP address). Then it will be able to transfer the whole database from the laptop to the other computers. Once they're all in sync, you can change the network settings back to their original settings, restoring the original Master.

### Printing single labels on a Dymo label printer

The "label" printing function in Campground Master assumes that you're using a standard sheet of 30 labels on a full-page printer. However if you have a Dymo label printer (or similar single-label printer), you can use the Envelope printing function to print single labels on it.

First you need to have the Dymo printer driver installed in Windows. Then change the Envelope printing setup in Campground Master as described below.

(Keep in mind that these settings would have to be reset if you wanted to print actual envelopes or sheets of 30 labels, so keep the original settings written down.)

1. Go to File / Printing Options, Offsets.
2. Enter 0 for both Top and Left printer offsets.
3. Uncheck "Print the park's return address...".
4. Enter 0 for "Address position for Envelopes", Top & Left.
5. Click OK.
6. Go to File / Printer Setup / Envelopes.
7. Select the Dymo printer.
8. Select the appropriate Paper size (for the labels you're using).
9. Select Landscape for orientation.
10. Click OK

Now if you use the Envelope printing functions it should print the Dymo labels -- even the batch-printing functions will work to print multiple labels. Note that the font type & size is not adjustable, but most addresses should fit on standard labels as it is.

The next major version of Campground Master will allow more flexibility and definition of Dymo label formats separate from envelopes, etc. For more information on Dymo label printers, see their web site:

<http://global.dymo.com/enUS/Home/default.html>

## **Miscellaneous**

### **Is your park Satellite Friendly?**

Here's a unique publicity opportunity, if you have an RV park that has some "open sky" sites where your customers can get a satellite signal.

The web site <http://www.satellitefriendly.com> is specifically designed for people who have Datastorm satellite internet systems by Motosat, but it's likely to be useful to anyone with a satellite dish on their RV. Datastorm users in particular have a need for open sky sites to get their internet connection, and they often can't tell from a typical directory whether a park has suitable sites. This web site helps them find out, so being listed on it can help your business -- but there's a trick to getting your park listed on the site. Of course you may be listed on it already -- check the site to find out.

The web site only takes submissions from other Datastorm users through a semi-automatic system -- the park's location on the map actually comes from their unit, when they're in the park and connected to the internet. This serves as "proof" that the park does indeed have an open site. So to get listed, you first need to find someone with a Datastorm system in your park -- keep an eye out for the extra-large dishes on RV's, like the one shown on the site (it must be a roof-mount, not on a tripod). If you see one, ask them to visit the SatelliteFriendly site and add your park to the database. In addition, if they're not already familiar with the site then they'll probably thank you for introducing them to it.

## **Newsletter #13 (Sept 22, 2005)**

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### **Contents**

#### **Q & A**

- Hiding the site number on confirmations
- Are credit card details secure?
- Getting to transactions on a linked reservation
- Selecting a Handicapped site for a reservation
- Rig Size is not limiting the sites shown
- Faster check-outs with a hot-key

#### **Tips & Techniques**

- Showing all customers with a balance due
- Limiting a workstation to Point of Sale use
- Handling POS sales for items without bar codes

### **Q & A**

#### **Hiding the site number on confirmations**

**Q: Is there any way to print reservation confirmations without showing the site assigned? We sometimes have to change sites before the customer arrives and would prefer not to print the site numbers on the confirmations.**

**A:** Yes, there's an option under Maintenance / Printing Options, Reservations tab: "Use the site Type on confirmations instead of the site name". Just check that option so it only shows the type of site and not the specific site name or number.

**Note:** In older versions, this option is on the Receipts tab, not the Reservations tab.

### **Are credit card details secure?**

**Q: I'm concerned about all of the credit card information on the computer if someone breaks in and steals it. Is there a way to protect the credit card information?**

A: If you're using the actual credit card number & expiration date fields (in the Guarantee Info and Payment entry screen, for instance) then the numbers are encrypted in the database file -- so someone can't just browse the file to see the information. They would have to run the software and know the operator log-in to access the information.

However if you entered the credit card information in any other field, for instance directly in the Guarantee Info notes field (e.g. before the separate fields were available, or without clicking the "..." button when editing the Guarantee Info from Reservation Details) then that's not encrypted. If you have old data that's in these fields it might be a good idea to clear it out.

### **Getting to transactions on a linked reservation**

**Q: How do I get to transactions on a linked (synchronized or submember) reservation? I can see by the reservation history that there's a charge on it, but New/Edit Transactions always comes up with the transactions for the "Linked master" instead.**

A: Just for clarification -- With changes in version 3.0 the transactions **should** always go on the linked master, not the sub-member or synchronized reservations. This is so that they will all appear on one receipt. However you may experience this problem if you already had transactions on these reservations prior to upgrading.

To get to the transactions on non-master reservations, you need to enable the option "Warn that transactions should go on the master" under Maintenance / Program Options / Prompt (because if the option is disabled, it always goes to the master reservation without asking). Then you can use New/Edit Transactions from the linked reservation -- it will show a warning about transactions on linked reservations, but click Yes to get past the warning. We recommend disabling that prompt again after you've resolved the transaction problem, to prevent transactions from getting in the wrong place again.



### Selecting a Handicapped site for a reservation

**Q: I've enabled the "Handicapped rating" Site field and put a rating number in the handicapped sites, and also enabled the "Handicap Access" Reservation field and put "Handicap Access" in the Quick-prefs so it shows as a checkbox when I make a new reservation. But when I check that preference, it doesn't limit the sites shown to the ones with a handicapped rating. What's wrong?**

A: The "Rating" attribute fields for sites are a 1 to 5 rating (5 being "best"), but the reservation fields are either "must have" or "must not have". Checking the preference box for a new reservation makes this a "must have". What this will do is include any site with a Handicapped rating of 3 or more, and exclude any with a 1 or 2 rating.

However, this assumes that ALL sites have the Handicapped rating field filled in -- if the field is left blank, it's treated as "unknown" rather than "no access" -- and since it's unknown the site will be shown as a possible match.

To fix this, simply go through each site and enter a Handicapped rating of "1" if it does not have suitable handicapped access, and a rating of 3 or higher if it does. Don't leave any of them blank unless it does not apply (e.g. for Storage, Shelters, etc).

### Rig Size is not limiting the sites shown

**Q: When I right click on a site and go to a new reservation, why does it allow me to put a 40' rig in a site that is set up for a 30' unit -- or if I pick out a site before knowing the size, and then enter the size, it will remove the site from the grid but still allow the reservation to be made on that site.**

A: First, the "Use Preferences" box must be checked in order for it to filter by the rig size (because the max length is an 'attribute' field in the site), and of course the max length field must be filled in for the sites. Then it won't show any sites that won't fit the rig size once the rig size is entered. Based on the second part of your question, though, it seems that you're already doing this.

You can also make sure "Use Preferences" is checked by default for new reservations -- go to Maintenance / Program Options / Reservations and select the option "Start New Reservations with "Use Preferences" checked".

However, as you've seen, if you select the site first and then enter a size too large for it then there isn't any warning if it won't fit (other than the fact that you won't see the "<NEW>" in the grid because the selected site will be removed). This is an oversight and will be corrected in the next version.

In the meantime, if this is a common issue then you might want to change your procedure so you go directly to New Reservation (click the telephone icon or press F2) instead of right-clicking on the site on the Rack or Map, and enter the rig size before selecting a site.

### Faster check-outs with a hot-key

**Q: Is there a way to check out people with a hot key (i.e. F-8)? It would be faster than right clicking with the mouse.**

A: There isn't a direct hotkey for checkouts, because you would still need to select which person to check out. However you can just press the "O" key to select the check-out function after you right-click on the reservation. Keeping one hand on the "O" key and one hand on the mouse, you can check out multiple reservations quickly.

In addition, you can keep the confirmation prompt and the Transactions dialog from appearing (unless they have a balance), so the check-out is immediately done. Go to Maintenance / Program Options / Prompts and uncheck the "Ask for confirmations..." option, and in the "Open a Transaction dialog" section uncheck the "Checking Out" option. Note that unchecking the first option will disable ALL of the simple confirmations, so you may not necessarily want to do this if your operators tend to get a little trigger-happy with the right-click functions.

### Tips & Techniques

#### Showing all customers with a balance due

While the Payments Due tab can be used to easily show all Reservations with a balance due, there is no report available to show Customers with a balance due. For most users this is irrelevant because all charges go on the reservations anyway. However there are some users that allow customers to "run a tab", adding merchandise and other miscellaneous charges to customer bills, as some customers do not have reservations (e.g. day-use members).

While there isn't any "simple" way to get this kind of report, here's a roundabout way to do it in the Transactions tab view. This will show all transactions for customers with a balance due (more information than you need, but at least it's comprehensive):

On the Transactions tab view:

1. Go to Detail Options, click "Reset the view to details/all transactions".
2. Go to More Filters, click "Reset Filtering (include all)".
3. Uncheck all of the "if balance..." boxes (lower right) **except** the one for Customer transactions..."if balance > 0".
4. Click Sites/Reservations...
5. Uncheck all three "if balance..." boxes, click OK, and answer Yes to the warning prompt.
6. Select "All Dates" from the Dates drop-down list.
7. Click OK to save the filter.
8. If necessary, go to Detail Options and select the "Balance Due" field and Customer "Last Name" & "First Name" fields.
9. You may also want to sort by the customer (click on the "Name" column header) to group the transactions for each customer together.

Though this shows each transaction, you can easily go through them to see which customers need to be billed (right-click to go to Transactions, print a bill, etc.) Note that we excluded reservations charges in step 4 so it only includes non-reservation charges -- but you can leave the "if balance > 0" option checked in that step if you also want to see those with outstanding reservation balances.

### Limiting a workstation to Point of Sale use

Some users with the POS option have one or more workstations in a store where they only do store sales, and don't want to show the reservation Rack. While there isn't a specific "POS-only" mode, you can achieve a similar result by limiting which tab views are available to the clerks.

1. Make sure the operators in the store are only given "Clerk" access levels, not "Reservations" or higher. This is done through Maintenance / Park Setup / Operators.
2. Go to Maintenance / Park Setup / Access Levels.
3. Edit the access levels for viewing the Rack, Map, and On Site tabs to have an override level of "Reservations".

Note that at least one of the tabs must be viewable by the clerk or else the Rack will show by default regardless of the operator's access. So you need to either leave the Transactions tab at the Clerk level (e.g. if they need to access this for reference) or else set the access level for viewing one of the other tabs, like the Unassigned tab, to Clerk level -- the Unassigned tab will likely be blank anyway, so that would be a safe view to show.

### Handling POS sales for items without bar codes

The Point of Sale module is designed for rapid sales using a bar code scanner, but it can be slower than a normal cash register for items that can't be scanned (e.g. entering "Other Charges" for miscellaneous items or selecting inventory items from a list).

For things that don't have UPC bar codes on them already here are a few ideas to speed up sales:

- Print bar code labels to stick on the items. You'll need a bar code font if you're good with Word and can design your own label, or else you'll need software to print bar codes -- we sell a package for \$99 that will print bar code labels or sheets.
- Print a sheet of bar codes for common things like ice, candy, day passes, etc -- you may have seen these the hardware store for bulk items like nails. Then you just scan the bar code on the sheet for that item.
- For the inventory item code, use a text or numeric code that you can type in easily (e.g. 3-digit product codes or words like "ice" and "wood"). If the inventory database only has one item with that exact "item code", it will auto-add it just like bar coded items so you don't need to use the mouse. If you have too many of these to remember, put the codes on the products as a labels (like on the apples in grocery stores), or print a reference list the way some grocery stores handle produce.

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## Newsletter #14 (Oct 20, 2005)

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## What's New

### Top 5 Networking Errors

This isn't really new, but we feel compelled to put it in the first section of the newsletter because it's so important.

Despite our best efforts in the documentation to warn about incorrect setup of the networking functionality, many people still set it up wrong. This is usually because a consultant comes in and assumes he knows what to do based on how other software works, and doesn't look at the documentation.

**PLEASE**, if you plan to set up Campground Master for networking, make sure the person doing it reads the documentation carefully. Setting up the networking incorrectly (specifically, trying to share the database file) can cause **massive data loss**.

In case you're already networked and you're wondering whether it's set up right, here are the top 5 signs you've set up the networking incorrectly:

5. You don't see a "Connecting to server" progress window when you start Campground Master on a client workstation.
4. You often get the message "Cannot open the database for saving".
3. Changes from one computer don't show up on another one unless you restart it. (Or changes disappear after restarting the program.)
2. You often get the message "Changes are present in the log that are not in the database" when starting Campground Master.
1. You didn't read the Networking Setup section of the documentation.

Any of these are signs that you may be trying to share the database file between computers instead of setting up the network the appropriate way (with each computer saving its data on its own hard drive). If this is the case, it must be corrected immediately to prevent further problems.

## **Q & A**

### **Reporting daily receipts**

**Q: How do I get a report of my daily receipts so I can balance the cash drawer?**

A: This is one of the easiest reports to create, and yet it's also one of the most common reporting questions for beginners (probably because its not in an obvious place).

1. Go to the "Transactions" tab view (the one on the far right, after Payments Due -- not on the top menu).
2. Click the "Summary Options" button at the top (if you have a small screen you may need to check the "Summarize" box first).
3. Click the button under Quick-Reports that says "Receipts by Payment Method".

If necessary, you can change the dates at the top to see previous days.

### **"Virtual Memory Too Low" message**

**Q: Why does Windows XP report "Virtual Memory Too Low" when I start Campground Master?**

A.: Campground Master loads the complete database into RAM memory, so this requires a lot of memory very quickly. This can cause Windows to temporarily "push out" some other applications you might have currently loaded into "virtual" memory (a file on your hard disk). We believe that the sudden increase in the memory requirements makes Windows believe that it will need more space on the hard disk, so it wants to make the virtual memory file bigger.

This is not really a problem and shouldn't affect the operation, though it may be an indication that you need more RAM to handle things efficiently. You may also be able to eliminate this message by specifying a larger fixed size for the paging file through the System settings -- however this is a job for your system administrator and could cause problems if done incorrectly, so we don't want to give details here.

### **Split reservation receipts, wrong site**

**Q: When I split a reservation in order to move the person to a different site, and then print a new receipt after moving them, the receipt still shows the old site instead of the new one. How can I fix that?**

A: Versions prior to 3.5 always used the "older" part of the reservation for the transaction master, so the receipt would show the old site. If you upgrade to version 3.5 (or the new 3.6), then there will be several options shown when splitting reservations. The recommended option will be to make the "new" part the master and the older part a sub-member, which will correct this problem.

### Export to Web, fixing the Park name

**Q: How do I get our campground's name to show up on the vacancy grid on our web site, instead of the name "My Park"?**

A: You need to edit the template file used in the Export to Web function. This template file is probably "All.htm" (unless you're using separate templates for different site types, etc.), and will probably be in the same folder as your database file. Open that file with a text editor like Notepad, edit the "My Park" text as needed (being careful not to change other parts of the file unless you understand HTML coding), and save the changes.

If you understand HTML coding then you can make other changes if needed -- the template is just an HTML file with special insertion codes for the grid. Some of our customers change it to look just like other pages on their web site, so it blends in.

### Correcting a previous meter reading

**Q: How do I correct a previous electric meter reading, so the charges are correct when I enter the new one?**

A: The previous meter readings are stored with the Site Details for each site -- so just right-click on the appropriate site name (e.g. on the Rack) and select Site Details. Enter the correct previous meter reading in the appropriate "Reading" field there.

### Error when restoring from floppies

**Q: Whenever I try to use the Restore from Backup function to restore from my floppy disk backup, I get an error like "Error restoring database backup". What's happening to the backups?**

A: This error can be caused by inserting the #1 disk of a multi-disk backup first, instead of the last one. If it takes more than one floppy disk to do a backup, you need to start the restore using the **last** disk of the set rather than the first one. After the restore starts, it will ask you for the other disk(s) when it needs them.

Of course you can also get this error if there's a problem with the disk itself, or the drive. We recommend that you do a "test" restore from your backup immediately after you make the backup, and do this at least once per week. If it fails, then it won't hurt anything because it won't load a damaged backup. If it succeeds, then you've increased your peace of mind.

## **Tips & Techniques**

### **Moving sites without splitting**

If you split a long-term reservation to move the customer to a different site in the middle of their stay, it may not auto-calculate each part the way you want. So you may want to move the whole reservation instead of splitting it. However, it won't let you do this if there used to be someone in the other site during any part of the reservation's date range (it reports a conflict), even if they've already checked out.

While we don't generally recommend this procedure, there is a way to handle a special case like this. One of our customers actually discovered this trick before we thought of it.

Note that this assumes you have version 3.5 or later, and it also assumes that you always use the Check Out function on past reservations rather than just leaving them with a "Checked In" status.

1. Go to Maintenance / Program Options / Reservations, and check the option "Make checked-out sites immediately available....".
2. Now you can move the entire reservation to the new site without a conflict (any past checked-out reservations will be ignored), assuming of course that there aren't any conflicts in the future either.
3. You can disable the option in step 1 again if you prefer to see the checked-out reservations on the Rack.

Note also that if you do change the option back to disabled in step 3 and then try to make any changes to the reservation details or dates later, that will trigger a conflict-check and could prevent the changes.

### **Rates for monthly add-on charges**

The Rates Setup Examples in the documentation (version 3.5 or later) have a simple example of an add-on like 50A, which is a standard site/reservation attribute field and usually applies to short-term stays.

However, you may have a need to set up an auto-rate that will be used in special cases -- for instance a monthly Cable TV charge that's optional. You can set up an "Add-on" rate for this, and use the "Applies if reservation field" option in the rate definition to add this charge automatically (assuming you're already using auto-rates or monthly billing for the basic charges).

Here are the steps needed:

1. Go to Maintenance / Data Field Definitions / Reservation Fields and locate the "Cable" field (the Field ID is `Attrib_Cable`), and change the Status to "Enabled". (If your need is for an option not present as an attribute field already, you can modify the name of one that's not being used.) If you prefer, you could add a new custom Attribute field for it (making sure it's a "request/attribute" type, not boolean) -- see here for details: <https://campgroundmaster.com/help/definedatafields.html>
2. Go to Maintenance / Program Options / Reservations and select the "Cable" field for one of the available Quick-select Preferences. This will add a Cable checkbox on the New Reservation dialog.

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

3. Go into Rates Setup and create a rate of type "Add-On" for the cable TV charge. Enter the charge for cable and other "Applies if..." conditions needed, as you would any other rate definition, and then select "Cable" from the list after "Applies if reservation field". It will show "True" after the field name when you select it, so leave that selected.

Now whenever you use Monthly Billing or Auto-calculate the rates, it will also add the cable charge for those reservations with that preference selected.

## Finding cancelled reservations

When you cancel a reservation (using the "Cancel" right-click function or by changing the status to "Canceled" in Reservation Details), the reservation is still in the system but is simply flagged as being canceled.

If you need to see which reservations have been canceled, or if you need to locate a particular one, there are a couple ways to proceed:

1. Click on the "Non-Reserved" tab view, and select "Canceled" from the drop-down list at the top (it defaults to "Waiting List"). Then select a date range, which corresponds to the dates during which the canceled reservation would have occurred (not the date it was canceled).

-- or --

2. Go to Reservations / Find Reservation, then click on Reservation Filtering. Select the "Canceled" item in the Reservation Status list at the bottom and then click OK. Now uncheck both of the "Filter by..." boxes so it will show all reservations with Canceled status. Note -- you should re-check the "Filter by" box before closing the Find Reservation dialog, otherwise it will list all reservations the next time it's used (which could take awhile).

Each method has its advantages and disadvantages, depending on which fields you want to see or what kind of additional filtering you want to use.

## Newsletter #15 (Oct 28, 2005)

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### Contents

#### **Q & A**

- Clerk Can Cancel a Completed Sale
- Room Availability Based on Pets (or other special cases)
- Using Discount Fields for Other Things
- Special One-time Discounts

#### **Tips & Techniques**

- Getting a List of Advance Deposits
- Listing Customers With Credits



## **Q & A**

### **Clerk Can Cancel a Completed Sale**

**Q. In the P.O.S. and Reservations Transactions, if the clerk hits Cancel at the end of the transaction then the sale is not saved into the system, even after a receipt is printed – is that right? I have had issues that when I go to Receipts by Payment Method a transaction is not listed but I have a printed receipt for a sale.**

A. Correct, clicking Cancel would cause the transactions to not be saved. To prevent this problem, check the option "Automatically save transactions when a receipt is printed" under Maintenance / Program Options / POS.

Also note that prior to version 3.6, there was no equivalent option in normal Transactions (non-P.O.S. sales), so there was no way to prevent canceling a sale after a receipt is printed. In version 3.6, this option was added -- go to Maintenance / Program Options / Prompts, and check "Save transactions immediately when a receipt is printed".

### **Room Availability Based on Pets**

**Q. Is there a way that I can make a room unavailable if certain criteria exists? For example: If someone has a pet and a room is a no-pet room, can I make it not allow the reservation if the customer has pets listed in the customer database?**

A. It can't be based specifically on the # of pets, but you can use the Attributes/Preferences functionality to flag sites that allow pets. Then you can keep those from showing as available for new reservations if you check a "Pets" preference box. There's already a Sites data field for "Pets OK", and a matching Reservations field. Enable those for both Sites and Reservations, through Maintenance / Data Field Definitions. Then you can add this field as a quick-preference checkbox on the New Reservation dialog by going to Maintenance / Program Options / Reservations and selecting the "Pets OK" field in the Quick-Preferences list.

### **Using Discount Fields for Other Things**

**Q: We use the discount fields for user defined fields i.e. membership numbers and the like. When I put in a discount the system "remembers" the last one used. Is there a way that I can make sure everyone is blank, so Auto-rates don't go goofy because of the wrong discount listed?**

A. There isn't a way to keep it from copying a discount from the discounts fields into a new reservation. If you use these fields for a special purpose and don't have other discounts, then it's simply a matter of ignoring the "Discount Used" and the rates should apply normally. Just make sure you don't have "Only applies if no discount used" selected in your rate definitions.

However, it sounds like you do have regular discounts as well. In this case we recommend that you avoid using the 1st Discount field for your special fields, reserving it for a "real" discount. Of course if it's blank then the next discount will still get copied to the Discount Used, but as long as the name is different from any normal discounts then you can account for this in your rates. If a normal discount is used, it should go into the 1st spot and will be used to select the appropriate rate as needed. Just make sure the normal/default rates are below any discount rates in the Rates Setup list to make sure they are applied first for normal discounts, then the normal rate is used if there's no discount, even if one of your "special" values gets in the Discount Used field.

## Special One-time Discounts

**Q. We offer some special discounts that are one-time only (like and introductory special). However since it remembers this discount and copies it into the customer record, it automatically selects that discount on their next visit when it shouldn't. How can I keep it from doing this?**

A. This is similar to the previous question about using discounts for other things, since it also relates to the remembering of Discounts, but in this case the solution is completely different.

For cases where you need to charge a different rate on only one visit, you can use a special Reservation Type instead of a Discount. (Note: This assumes you're using version 3.0 or later, so reservation types can be added.) Go to Maintenance / Pick Lists / Reservation Types and add a new type for the special rate, e.g. "Intro Special". The Base type should be "Normal", this just determines how the reservation is treated.

Now when you define the Rate for it, select the "Intro Special" type in the Resv Types list (removing Normal, etc.), so the rate applies to only that reservation type. (Also clear the Discounts list.) Then be sure to select that reservation type when making a reservation so it gets that rate. It won't remember this in future reservations for that customer so you avoid the original problem, but you still have a record of it (and can do some great statistical tracking on it as well).

## Tips & Techniques

### Getting a List of Advance Deposits

The Transactions tab view can be a very powerful reporting tool if you know how to use the filtering. All of the options available are probably pretty daunting at first, but once you try a couple things it will begin to make sense.

One of the things you may want to do for an upcoming season is get a list of all deposits received for reservations. We'll make the assumption that you only care about deposits on reservations (not credits on customers without reservations), and you only need to see the reservations not yet checked in, since deposits for checked-in reservations are no longer an issue.

Here are the steps for getting this report:

1. Click on the Transactions tab view, and make sure the "Summarized" box is not checked.
2. Click on "More Filters"
3. Click "Reset Filtering (include all)".
4. Select "Deposit" under Transaction Types.
5. Select "All Dates" in the Dates box.
6. Click "Sites/Reservations".
7. Hold the Ctrl key down and select "Pending", "Confirmed", and "Guaranteed" under Reservation Status.
8. Click OK twice to save the filter and back out of the dialogs.

This will show all deposits for upcoming reservations, assuming of course that you don't have any old reservations left as pending by mistake. (To make sure it doesn't report old reservations, you can also filter by the reservation starting date in step 7).

You can change the Detail Options if you need to show or hide some of the fields, and you can sort by customer name to avoid the gaps between each date.

Another useful thing you can do is to Summarize the report, for instance to show deposit totals for each Site (for seasonal parks, this is a good way to see which sites are delinquent in their deposits). There are a couple ways to do this. A quick way is to sort by the Site column first, then check the Summarize box. It will know that you're requesting a Site summary due to the currently sorted column, and so that's what it will summarize by -- showing the total deposits for each site. Another way to do this is to go into Summary Options, select Site under "Group total for each", then click OK. The results will be the same.

Hopefully this simple example will give you some other ideas of what you can achieve with filtering.

### **Listing Customers With Credits**

Another report that's not used as much as it could be is the Payments Due tab view. One of the unusual but useful things it can do is show a list of customers that have credits with the park. This assumes that you've used the Transfer Deposit/Payment function to transfer money out of the Reservation to the Customer records, e.g. for giving credit toward a future stay. It's a fairly simple report to set up:

Go to the Payments Due tab, click on the Options button, and make sure these are checked:

- Include credit balances...
- Show any reservations with balances...
- Use Customer balances...

Also, make sure these are NOT checked:

- Pending, and...
- Checked In, and...
- Checked out....

Click Save, and it should now show all customers with balances. Now if you click on the Customer Balance column heading to sort that column, you can see which ones have negative (credit) balances since those will be at the top.

## **Newsletter #16 (Nov 10, 2005)**

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### **Contents**

#### **Q & A**

- Disabling the meter reading options (reports)
- Automatic capitalization of names
- Selecting a site by typing the site number
- Backup files won't accept the date
- Disabling the credit card information

#### **Tips & Techniques**

- Mailing list for last season's campers
- Canceling after Checked Out

## Q & A

### **Disabling the meter reading options**

**Q: How can I disable some or all of the meter reports (like water & gas)?**

A: Basically it's the reverse of the procedure for enabling them -- go to Maintenance / Data Field Definitions / Site Fields. Locate the applicable fields, e.g. for Electric meters look for "E. Meter" & "E. Reading" fields (there will be 3 fields for each type of meter, near the bottom). Change the Status for all 3 of them to "Disabled".

**WARNING -- If you disable fields that have data in them, that data will be wiped out -- so don't disable the wrong ones!**

### **Automatic capitalization of names**

**Q: When I'm on the phone I only have one hand available for entering information. Is there a way it can capitalize customer names (just the first letter) without having to hold the Shift key each time?**

A: Yes, this was an option added in version 3.1 but it's turned off by default. Go to Maintenance / Program Options / Formats and enable "Automatically format customer information". This works on not only the name but also the address fields.

### **Select a site by typing the site number**

**Q: Can I just type the site number in the New Reservation dialog when making a reservation, instead of using the mouse to find the site in the list or grid?**

A: There isn't a regular place to type the site number, but there is a way to avoid the mouse using a couple shortcut keys. When you're ready to select the site, press the **F9** key (this opens the Search function -- **Alt-S** can also be used)). Type the site number, and press **Enter**. This will scroll the grid to the site and highlight it. Now you could double-click it in the grid, but better yet, just press **Alt-A** (which is the hotkey for Add Selection).

### **Backup files won't accept the date**

**Q: When I try to name my backup with the date, like "Backup 11/4/05", why does it say it's not a valid filename?**

A: The slash character can't be used for file names in Windows. Use the dash character instead, like "Backup 11-4-05", and it should work fine.

### **Disabling the credit card information**

**Q: I want to enter credit card transactions that were made on a separate terminal, so I don't need the credit card information in Campground Master. How do I disable this on the Enter Payment dialog?**

A: It's not really necessary to disable it -- you can just leave it blank. But if you want to make it disabled for simplicity or security, then you can change the applicable payment methods so they look like a check entry. Go to Maintenance / Pick Lists / Payment Methods. Check "Allow editing of fields", then change the Base type for each of the credit cards to "Check" instead of "Credit Card". If you also want the Reference field available for other info, select "Yes" for that column.

## **Tips & Techniques**

### **Mailing List for last season's campers**

Let's say you want to generate a mailing list for everyone who camped last season (or during any particular dates), removing duplicates. You don't want to include anybody who wasn't here all last season. This is easily done with the following steps:

1. Go to Reports / Mailing Labels
2. Check the options "Use reservations..." and "Filter out duplicate..."
3. Go into Reservation Filtering...
4. Check "Filter by Date".
5. Select "Start date" or "Start-to-end", depending on which is more appropriate, and enter the date range needed.
6. Hold down the **Ctrl** key and click the "Checked In" and "Checked Out" items under Reservation Status to select both of them (assuming you don't want the cancelled ones, etc.).
7. Click OK.

That should give you the list you want, and you can print or export it (or go ahead and print labels if that's your goal anyway). Remember that you can also sort by any column needed just by clicking on the header for that column.

Note: In step 6 you may also want to include Day Pass if those apply to you, and possibly even Inquiry and Waiting List if it's a promotional mailing.

Note that the duplicate removal is based on customer records, not customer names. If you still see duplicates with "remove dups" checked then there must be multiple customer records with the same information in them. These can be fixed by using the Merge function in the Find Customer dialog.

### **Canceling after Checked Out**

Once you make a reservation checked in or checked out, the normal "Cancel" function on the right-click menu and in Reservation Details is disabled, mainly to prevent accidental cancellation. However there may be times when you need to do this anyway -- for instance if the customer decided they can't stay the night, and you checked them out (not realizing that would still occupy the space for the night).

To get the reservation fixed to a Canceled status, follow these steps:

1. Locate the reservation and get to Reservation Details.
2. Click on the "Checked Out" checkbox in the upper right (the only one that's checked and enabled). Confirm the prompt, and they will become Checked In again.
3. Click on the "Checked In" checkbox in the upper right (the only one that's checked and enabled). Confirm the prompt, and they will become Pending again.
4. Now click on the "Canceled" checkbox to cancel the reservation.

At this point you can negate charges and/or enter a refund as needed, just like any other cancellation where they've already been charged and paid.

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## **Newsletter #17 (Nov 21, 2005)**

### **Contents**

#### **Q & A**

Reservation shows unpaid (red) on the Rack

Deleting the Demo  
Entering "Paid Out" transactions  
Rack is starting on an old date

### **Tips & Techniques**

Carrying the Rack dates into New Reservation  
How to set up a Map (a brief overview)

## **Q & A**

### **Reservation shows unpaid (red) on the Rack**

**Q: Sometimes a reservation is shown with red text on the Rack (or other views) instead of the normal black text. How can I fix that?**

A: The red text simply means that the "Paid Through" date is not set for the reservation. The program usually sets this automatically when you enter a payment, if it equals the charges added to the reservation (paid in full), and if those charges were added automatically or through Select Rates. If you enter charges before the payment, or add manual Charge transactions, it may not set the paid-thru date automatically.

To fix a reservation in this condition, just go to Reservation Details for that reservation and "check" the box in front of the Paid Through date to indicate that it's paid through the date shown. (You can also do this in Reservation Transactions by clicking on the paid-thru date in the reservation information grid.)

### **Deleting the Demo**

**Q: Can I delete the demo version of the program, or at least the "Demo" icons on the desktop?**

A: There isn't really a demo "version" of the program -- it's all the same program. There is simply a special "Demo" database, and the icons on the desktop just tell it to open the demo database instead of your normal database. So all you need to do is delete the icons named "Campground Master Demo" and "C.M. Demo with POS". This won't delete the program itself, just those special shortcut icons.

### **Entering "Paid Out" transactions**

**Q: How do I enter "paid outs", e.g. expenses paid from the cash drawer?**

A: Go to Transactions / Enter Expense Transaction. Here you select the category, payment method, etc. Note that if the cash isn't coming from the same place as where the income goes (e.g. a different "petty cash" box instead of the normal cash drawer), then you should use a different Payment Method to avoid confusing it with cash paid in. The same applies to payments you make by check -- e.g. add a "Company check" item (through Maintenance / Pick Lists / Payment Methods) so that it doesn't look like a check received.

### **Rack is starting on an old date**

**Q: Why does my Rack view always start on an old date instead of today (or yesterday with the red line), even when I click Reset/Today?**

A: Go to Maintenance / Program Options / Reservations (in newer versions, you also have to click on the "Reservation Default Values..." button), and make sure the option is checked to "Ignore default start date once it's in the past". If not, then it will always start on the default date specified there. If that doesn't solve the problem, check to make sure your computer's date is set correctly (that's how it knows what "today" is).

## **Tips & Techniques**

### **Carrying the Rack dates into New Reservation**

If you typically change dates on the Rack to determine what's available for a reservation request, you may have noticed that it doesn't remember those dates when you go to New Reservation.

There is one way to get the dates to carry over -- start the new reservation by double-clicking on the open site where you want to make the reservation, instead of using the New Reservation function. This also selects that site for the reservation.

Two other conditions must be met for this to work:

1. The "Available Only" box must be checked in the upper left corner of the Rack.
2. The "Use date selections from the Rack" option must be checked in Maintenance / Program Options / Reservations.

Note that on the Map view there isn't an "Available only" checkbox, but double-clicking on an open site will still use the dates selected (if the #2 condition above is also met).

### **How to set up a Map (a brief overview)**

The Campground Master documentation covers the details of map setup quite extensively, but it may quickly get too technical for some users who simply want to know in general terms what's involved in setting up the map.

There are basically 2 steps :

1. Create a "background" image, outside of Campground Master. For instance you can scan in a map from a printed brochure, or draw one using any image software like the Windows Paint program or Corel's Paint Shop Pro. This can just show roads or other landmarks for reference in step 2, or it can be as fancy as you like. Note that it's not necessary to draw each site, since Campground Master can draw rectangles or circles in the site locations.
2. In Campground Master, go to Maintenance / Park Setup / Maps. This is where you load the background image you created, and then place rectangle or circle "indicators" on top of the background which will show the current status of each site and allow interaction (click the site to make a reservation, show details, etc.)

You can go back and make changes any time, like changing your background image (outside of Campground Master) and/or changing or adding site indicators (through the Map Setup).

For several examples of what our customers have come up with, see the web page below:

<http://Campground-Master.com/maps.html>

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## **Newsletter #18 (Dec 7, 2005)**

### **Contents**

#### **Q & A**

Switching linked masters on split reservations  
Reporting POS sales separate from rentals  
Avoiding tax on certain fees

Looking up customers by phone number  
How to do an "on account" sale

### **Tips & Techniques**

Resolving "Workstation already in use" network errors  
Blocking sites for many days at once

## **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).

## Newsletter #19 (Jan 2, 2006)

### Contents

#### Q & A

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### Q & A

#### Deleting Expense and Misc Income Transactions

**Q: Is there any way to delete an expense entry once it has been made?** (Also applies to Misc. Income transactions.)

**A:** Yes, you need to locate the expense on the Transactions tab view, then right-click on the Expense item and select "Transactions". This will open it in an Unbound Transactions dialog, where you can select the transaction and click "Delete selected items" to delete it.

**Note:** First you need to get it into Details mode showing all transactions, so you can locate the transaction -- click on the Details Options... button, and in there click Reset the view to details / all transactions.

## Viewing manually entered credit card info

**Q: Even though we still use a separate credit card terminal, we enter the credit card information into Campground Master when entering payments and deposits. How can I find this information later?**

A: The credit card number is in the "Check #/Ref" field on the transactions. If you go into the customer or reservation's Transactions entry and check the "Details" check box in the upper right, you'll be able to see that field by scrolling the grid over to the left. Or you can also go to "Transaction History" from Reservation Details or Customer Details.

By the way, you might consider getting a credit card swipe for the computer so you don't have to enter the information manually. Campground Master will work with a card swipe even if you don't process the cards through the computer. Stand-alone terminals won't interface to the computer, so you'll need one that interfaces through the keyboard port or a USB port. We sell these for \$125 + \$10 s&h (shipping outside the US will be a little more). See the web page below for more information:

[http://campgroundmaster.com/hw\\_idtech.html](http://campgroundmaster.com/hw_idtech.html)

## Changing rates for the new year

**Q: How do I change the upcoming year's rates, without affecting this past years rates?**

The best (safest) way is to duplicate each rate that's changing, and set the Season Dates of each one appropriately. This way you have one set of rates for this year and another set for next year. This is better than just changing the old rate definitions because it will keep an auto-calculation from affecting old reservations, particularly long-term stays.

In Rates Setup, select each rate definition that will change (you can use Ctrl-click to select many at once), and click "Copy Selected Rates". Now Edit each rate definition -- in each of the old rates, put the old range like "1/1/16 to 12/31/16" in the Season Dates Applicable field. In each of the new rates, put "1/1/17 to 12/31/17" (and change the "Each" amount of the Charge, etc.).

Note that this will make the new rates apply according to the Reservation's dates (dates of stay), regardless of when they made the reservation. If instead you want to apply the new rates according to when they MAKE the reservation (e.g. existing reservations get the old rate, but anyone calling after a certain date gets the new rate), then a different method is needed. See the article on Grandfathering rates (newsletter 39).

## Charges don't stay in when doing a confirmation

**Q: When I click quote how can I save the prices? I loose everything and when I go back I have to put the prices in all over again.**

A: The "Quote/Confirmation" transactions are temporary by design so they don't affect your accounting (e.g. show it as income immediately). If you don't care about that, then use "New/Edit Transactions" to put in the charges permanently and then print a confirmation from there, instead of using Quote/Confirmation.

Ideally you want to set up Rates so that auto-rates work (so you don't have to enter charges manually at all), and have it automatically add the charges when they check in. Refer to the Rates Setup documentation for more information about auto-rates.

## **Tips & Techniques**

### **Report the number of reservations last year**

One of our customers needed to know how many reservations they had in 2005. The Occupancy report can show the number of site-nights (if you turn off "Show as percentages"), but they didn't want that -- just how many actual reservations regardless of length. The steps below show how this can be done with a different report.

1. Go to Reports / Arrival Statistics.
2. Click "Site/Reservation Filtering" and "Reset Filtering (include all)" (to make sure the filtering is cleared). Select "Checked In" and "Checked Out" in the Reservation Status list (to exclude any canceled, etc.). Click OK to save the filter.
3. Click "Year-to-Date", and group by "Site Class" (for a short list), or whatever grouping works best for you.
4. Generate the report, and this will show the # of arrivals (e.g. unique reservations) for each site class.

The only drawback is that it won't show arrivals in the previous year (2004) that stayed over into 2005. If you're a winter-season park, then using the Departures report the same way might be more useful (since most winter visitors stay through the end of the year).

### **Networking - How to set up a static IP address**

If you're using the Campground Master networking option, you'll find that it works best if you configure the master workstation (server) to use a "static IP" address. Otherwise, you may have to occasionally reconfigure all of the client workstations to a new IP address. Without a static IP, the master might change its IP address any time it's rebooted, or when the network router loses power, which in some cases might be pretty often.

This is mentioned briefly in the documentation, but it doesn't cover any details. We still haven't had a chance to put together a complete tutorial on this because there are so many different situations that require different steps. So for now, we've used Google to search for tutorials on the web. Here are some references that may help, but of course we can't guarantee the accuracy or whether they apply to your particular setup. If you're not willing to experiment, please have a professional configure your network, as we can't help you with network problems outside of Campground Master.

Information for Belkin routers, but appears to be generic Windows instructions. Covers all versions of Windows up to XP:

<http://www.belkin.com/support/kb/kb.asp?a=2824>

This has detailed steps for all versions of Windows:

<http://portforward.com/networking/staticip.htm>

Note: They also try to get you to download software that sets up the static IP for you, but I don't know if it works -- I recommend using the guide listed for your version of Windows.

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## **Newsletter #20 (Jan 22, 2006)**

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Why can't I select "Propane"?

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Finding out when Monthlies are due to pay

Changing "Receipt #" on invoices  
Sorting unassigned reservations by date made  
Changing "My Park" on the web vacancy grid

### **Tips & Techniques**

Handling different numbers of digits on meters

## **Q & A**

### **Why can't I select "Propane"?**

**Q: Why can't I select the Propane category for a charge?**

A: Some older versions of the program added an extra space in the default text for the Propane category when a new database was created. To fix this, go to Maintenance / Pick Lists / Transaction Categories. Check the "Allow editing of fields" box at the top, and then click twice on the word "Propane" under Normal Text. Move the cursor to the end of the word and you should see it go one space past the end -- use the Backspace key to erase the extra space, and press Enter. Click Done to save the change, and it should work now.

### **How can I get it to remember by database?**

**Q: Every time I open Campground Master, I have to use File / Open Previous Database to open it. It doesn't remember where my database is, even though I open it each time.**

A: In recent versions there's a special command you must use to tell Campground Master where to load the database by default (this was done to prevent a common problem when File / Save As was used improperly to make backups or File / Open was used to open backups, instead of using the Backup & Restore functions.). To make it remember the current database, go to Maintenance / Program Options / Database and click the big button "Change the Auto-open database to the Current database".

### **Finding out when Monthlies are due to pay**

**Q: Why doesn't the Payments Due report show my monthlies that are coming due within 5 days, even though I have the option set for "Checked In and 5 or fewer days until the current paid-thru date"?**

A: This is most likely because the Last Night of the reservations are equal to the Paid-Thru date, so the program assumes they're paid in full and will be leaving as "scheduled". It can't assume that the reservation will be extended, so you would have to extend it first before it will appear unpaid. If they are Monthly-type reservations, try using the Monthly Billing report under the Transactions menu. While it might not show the correct charges due if you don't have the Rates set up perfectly for auto-rates, it should at least show all monthlies coming up for renewal.

### **Changing "Receipt #" on invoices**

**Q: I don't like it to show the term "Receipt #" on the invoice forms, since it's not a receipt -- can I change that?**

A: Go to Maintenance / Data Field Definitions / Transaction Fields, locate the Receipt # field and change the Normal Header to what you want (in version 3.9 or later, change the Short Label and Report Heading). Note that this will change it on all types of receipts, however, so you'll need to make it something generic like "Statement" or "Ticket #".

### Sorting unassigned reservations by date made

**Q: How can I add Reservation "Date Made" field to the Unassigned tab? I need to be able to assign sites on a first come first serve basis for events. With that field available to me, I can sort and assign.**

A: There isn't an option for this in the current version (the next version will allow field additions to the tabs), but here's an alternative -- if you include the Confirmation number, you can sort by that. It typically includes the record ID of the reservation which will be in the order that they're made, with one exception if you're using multiple networked computers -- the workstation's ID will be the left-most digit(s). So for instance R01000555 was made on workstation #1, and R00000570 was made on workstation #0. The 555 one was made earlier than 570, but will appear "later" in the list because of the "R01" in front. So just pay attention to the right-most digits of the number.

By the way, another alternative is to go to Reservations / Unassigned reservations, which does allow sorting by the date made. However this shows all unassigned reservations in the system, regardless of their starting date, which may include many that you don't want to work with at the time.

### Changing "My Park" on the web vacancy grid

**Q: When I export the Rack Grid to an HTML file, its text in the grid says "My Park" instead of our park's name. Is there an easy way of having this grid pick up the name of the park from the database?**

A: What you need to do is edit the "All.htm" template file to put your park name in it, or whatever other web page elements you want. This allows you to use whatever you want as a template, to make it look like the rest of your web site. It's just a text file, so open it with Notepad or other text editor.

There's also a mention of this in the documentation here:

<http://campgroundmaster.com/help/exportingtowebvacancygrids.html>

## Tips & Techniques

### Handling different numbers of digits on meters

**UPDATE:** Version 10.0 added a new feature to make this easier, so you can use that instead of the old method explained below. See the new article:  
<https://campgroundmaster.com/news/meters---handling-different-nu.html>

However the original method below will still work if you have more specific needs or don't have version 10.0 yet:

If your park has a variety of electric meters, some older than others, then some meters may have a different number of digits than others. Eventually you'll run into a problem of the numbers wrapping around to 0, which is handled by Campground Master through the wrap-around numbers in the Park record. When a meter reading is entered and charges calculated, it will know that it wrapped around (since the previous reading was much higher than the current reading), and will calculate based on the wrapped-around number. For instance, a reading of 150 when the previous reading was 9800, assuming a 4-digit meter, will be treated as 10150 instead.

However, the Park record only handles one wrap-around number for each meter type. To handle meters with different numbers of digits, you actually have to use separate parks. Here's how to do this:

1. Go to Maintenance / Park Setup / Parks.
2. You'll need to copy everything here to another Park record, so Print this one so you have a handy reference. Also write down the Key Code, since that's not part of the printout.
3. Make sure the "Short Name" field is something logical -- usually it's something simple like "Campground" or a short version of your parks' name. The customer never sees this, so the main purpose is so that you can distinguish between different Park records -- so in this case it might be better to have it be something like "Old meters".
3. Click Add New to add another Park record. All fields will be cleared, you're now editing the new record.
4. Enter everything exactly the same as the previous record (from the printout), particularly making sure that the Authorization Code is the same. The only differences should be the Short Name, which must be different for this record (e.g. "New meters"), and of course the meter wrap-around number will be different since that's why you're doing this.
5. Click Save to save the new record. You might get a Warning message about the Auth code -- that's OK. However if you get an Error message about the Auth code, then double-check the park name and address to make sure it's identical. The Key Code should match the other record -- if not, then something is different in the name or address.
6. Now you need to go into the sites and select the appropriate Park for each site. Go to Maintenance / Park Setup / Sites, and change the Park selection as needed for any with the new meters. (The sites should already have the first Park selected, so no change is needed if they will stay with that one.)

Once the sites are all assigned to the correct Park, their meter readings will wrap around properly.

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## Newsletter #21 (Mar 11, 2006)

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#### **Q & A**

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- Changed field name but dialog label didn't change
- Checking out a customer with a balance
- Clearing a site due to early departure
- Receipts with running totals

#### **Tips & Techniques**

- Handling Gift Certificates
- Handling special-case rates

Putting different text on confirmation letters

#### Miscellaneous

Networking through a dynamic internet IP address

### 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?**

**Note:** This information has been updated and is now in newsletter #36.

Original answer:

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".

Update: As of version 10, the option to allow checking out with a balance is not a Program Options setting, it's an Access Level (Maintenance / Park Setup / Access Levels), with a default setting of "Reservations". You can set the operator level allowed to check out with a balance as needed, for either balance due ("Check Out a Reservation with a balance due") or a credit balance ("Check Out a Reservation with a credit 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 "Canceled" 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, let's 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. If you prefer, you could add a new custom Attribute field for it (making sure it's a "request/attribute" type, not boolean) -- see here for details:

<https://campgroundmaster.com/help/definedatafields.html>

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 / Printed notices & text / Confirmation letter text & options (in older versions, it's under Maintenance / Park Setup). 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.

## **Newsletter #22 (Apr 10, 2006)**

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### **Contents**

#### **Q & A**

- Alphabetical listing of all customers
- Pre-dating transactions and previous customer balances
- Entering credit card payments without processing
- Printing the credit card number on receipts
- Entering payments of two different types
- Changing the customers in group reservations

#### **Tips & Techniques**

- Disabling the login prompt
- Quicker credit card payments

### **Q & A**

#### **Alphabetical listing of all customers**

**Q: How can I get a report or list of all customers in alphabetical order, to check for duplicates, etc.?**

A: Just go to Customers / Find Customers, and uncheck the "Filter by" check box so it shows all customers. If you find duplicates, highlight them (use Ctrl-click to select each one) and use the "Merge Customers" function. Press the F1 key on that dialog to open the Help if you need more details.

### Pre-dating transactions and previous customer balances

**Q: We want to enter current reservations into the database that have pre-paid before we started using the software, and show that they are paid. However when we put it in as a payment, it shows in the reports as new income. How can we put in a previous balance without showing any transactions?**

There are a couple ways you could carry over a payment/credit balance. You still have to enter it as transactions, but you can keep those from showing on current reports.

One way would be to go ahead and enter it as a payment, but change the payment date (e.g. to last year) so it doesn't show on "current" transactions reports. Likewise any previous charges you enter should be back-dated, so nothing will show on reports for this year.

To back-date transactions, see this previous newsletter article:  
<http://campgroundmaster.com/news/back-datingtransactions.html>

The other option would be to use the "Credit" transaction type instead of Payment. This won't show on reports for "Receipts", even if you don't back-date it (but it does show on some types of reports, so you may still want to back-date it to be safe).

### Entering credit card payments without processing

**Q: I need to record a credit card payment in Campground Master that was already processed externally, but we're set up to process cards automatically through X-charge. How can I show the payment as a credit card payment without processing it again?**

A: You just need to disable the credit card processing functionality temporarily, then enter the payment like you normally would a cash payment but select the appropriate credit card payment type anyway (the "Process Card" option will not be there so it just goes in as a simple payment). Then re-enable the processing.

To disable and re-enable the processing, go to Maintenance / Credit Card Processing Setup and check or uncheck the "Enable" box. Administrator access is required for this by default -- if you want to give Managers access to do this, you can change the access required through Maintenance / Park Setup / Access Levels.

### Printing the credit card number on receipts

**Q: Is there a way that I can show the whole credit card number on customer statements, invoices etc.?**

A: According to merchant rules the full credit card number cannot be shown on the printed receipts, so we won't include it in the standard forms. This is a fairly recent change in the rules that required most businesses to buy all new credit card terminals (unless of course they were processing credit cards through the computer instead of using a separate terminal).

Though it is possible to print the full card number by creating a custom form (in the upcoming version or the current beta release), it's not recommended and could subject you to fines by the credit card company.

### Entering payments of two different types

**Q: A customer wants to put part of his bill on his credit card and pay the rest with a check. Can we do that?**

A: Sure -- when entering the first payment on the Enter Payment dialog, just change the "Amount to pay" to the amount to be paid with one payment method, instead of using the default full payment. Complete that payment with the appropriate Payment Method selected, then enter another payment for the balance.

## Changing the customers in group reservations

**Q: After I make a group reservation (or any reservation for more than one site), how can I change the customer information for one site without changing it for all of the others?**

A: They need to be "non-synchronized" in order to have different customers, which will also separate the billing. The primary way to correct this is to use the "Change to a different customer" button under the Reservation Details. This allows you to select or add a new customer for that site's reservation, and will automatically make it non-synchronized. If the reservation is a "Group" type, there will be a shortcut to this function ("Change customer") on the right-click menu.

Note that you may need to go into the Transactions of each reservation afterwards to actually correct the charges (depending on your auto-rates options), and possibly transfer a portion of the deposit or payment to the other customer's reservation.

You might also consider making future reservations as non-synchronized to begin with. To do this in the New Reservation dialog, uncheck the "Synchronized with" box before adding each site.

## Tips & Techniques

### Disabling the login prompt

This is actually covered in the manual (under the Maintenance / Park Setup / Operators), but since we still get asked this occasionally we'll repeat it here.

If you're the only person that will ever use the program, you may want to set it up to automatically log in with your operator name when the program starts. You will have to decide whether it's worth the risk (e.g. if anyone else has access to the computer, they would have complete access to the database), but this option is provided for convenience.

To set up automatic login, you will need to add two parameters to the "command line" of a shortcut icon to the program. To do this, right-click on the Campground Master icon on your desktop (or wherever you start the program from), then click on the Shortcut tab. The Target edit box should contain the full path of the CampgroundMaster.exe file, which is the command line. Go to the end of the line and add the following text, replacing [login] and [password] with your appropriate login and password:

```
/Operator=[login] /Password=[password]
```

Note the capitalization of Operator and Password, the direction of the slashes, and make sure there is a space before each slash, including the first one. For example, to log in with the default administrator and password, add this to the command line:

```
/Operator=Administrator /Password=Password
```

Also note that the program file and path should have quotes around them (which may already be there) -- so typically a complete target line would be:

```
"C:\Program Files (x86)\Campground  
Master\CampgroundMaster.exe" /Operator=Administrator /Password=Password
```

### Quicker credit card payments

If you handle credit card processing through Campground Master, or at least enter the credit card information for your records, there's a new feature that can speed things up. (Version 3.6 is required for this.)

Once you're in the Transactions (or POS Sales Entry) dialog, just press the F7 key. It will open the payment screen with the cursor already in the credit card number field. Don't worry about the Payment Method -- once a credit card number is entered or swiped, that's selected automatically anyway.

## Newsletter #23 (May 13, 2006)

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- Reporting all reservations for the season
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#### Tips & Techniques

- Avoiding \$0 charges for add-on rates
- Partial refunds to a credit card

#### Q & A

#### **The Save button is always greyed out**

**Q: The Save button is always grayed out, so I can only make backups, not save the database. How can I save the database without making backups?**

A: Campground Master actually saves the database automatically every time you make a change, so there's no need to use Save (you may see "Saving database" flash briefly on the status bar at the bottom). You can turn off auto-saving (in which case the Save function would be important), but it auto-saves after every action by default. In fact if the Save function (the "floppy disk" icon) is blue instead of the normal grey, then that usually indicates a problem that needs to be corrected immediately so you don't lose your data.

#### **Reporting people with deposits due**

**Q: We require deposits for all campsites within 14 days of making a reservation, is there a way to check who has deposits outstanding that should have deposits in at that time?**

A: Take a look at the Payments Due tab. Click on the Options for it, and you can select "Pending, and:", "Reservation was made more than 14 days ago". Also check "Show pending only if NO payments", but DON'T check "Show pending only if there is a balance due".

## Reporting all reservations for the season

### **Q: How do I get a list of all reservations for the upcoming season?**

A: In Reservations / Find Reservations, just check the "Filter by date" box and select the From & To date range for the season (make sure "Resv period" is selected, not "Date Resv made"). Also make sure "Filter by" is NOT checked, so you're only filtering by the date range. Now it should show all reservations for the season.

You can also get this in a possibly more useful way by using the On Site tab view. Again just select the From and To dates as needed and it will show all reservations scheduled for that period. Make sure the "Current only" box is NOT checked, so it will also show future reservations rather than just the ones currently checked in.

## "No Site" cells on the Rack

### **Q: Why is "No Site" all over the Rack, and how do I fix it? (or... Why is a number like "1" in grey on all available sites)**

A: This is covered in the documentation (and there's a quick answer shown when you right-click on one of the No Site cells), but we still get quite a few calls about this because it can be scary the first time it happens. So we're repeating the information here so hopefully you won't be startled when it happens.

Occasionally you may see "No Site:1" (or some other number) in a cell that should otherwise be open. (If the full text won't fit in the cell, you may just see the number, or may see the "..." ellipsis and can place the mouse over the cell to see the full number.) This indicates that there are reservations for this date which have not been assigned sites, and this will appear in every open site cell for each date that has unassigned reservations. This is essentially a warning that you should not fill the open sites for that date until the unassigned reservations have been assigned sites, or that you should at least leave enough sites open to satisfy the unassigned reservations -- or that you've made a mistake and created a reservation without a site assigned to it.

To assign a site to the reservation or to cancel accidental unassigned reservations, you can go to the Unassigned Tab View where they will be listed for the date range selected. Alternatively you can right-click on a "No Site" cell on the Rack and select "View Unassigned reservations for this date". From there you can view the Reservation Details for any unassigned reservations and use "Assign or Change Site" to assign it to the proper site. Alternatively if it's an accidental duplicate you can Cancel or Delete the reservation.

## Cleaning up cancelled reservation charges

### **Q: I have some reservations that I had canceled and did not zero the balances, so I need to clean those up. Could you email me step-by-step instructions?**

A: It's difficult to give details since there are many possible issues that might need "cleaned up", but here are some basic tips for handling cancellations:

If you have version 3.6 and you're using auto-rates, go into Maintenance / Program Options / Auto-rates, and check the bottom box ("Assume no auto..."). Then if you go back into the canceled reservation and click Auto-Calculate, it may clean itself up (negate the original auto-charges).

If that doesn't solve it, then basically you need to enter opposing Charge transactions, e.g. for each previous charge, enter an equal one with a negative quantity to balance it out (don't forget to select the same category as the original charge, and apply applicable taxes). You want to end up with a negative balance equal to the original deposit or payment made, or if no deposit or payment was made then you want a \$0 balance.

You can also add a cancellation charge if necessary, which will reduce the amount of refund to be given (if any).

Finally, if you need to refund the deposit or payment then enter an appropriate Refund transaction to balance it out.

### Checking out with a balance (to get them out of the way)

**Q: When someone leaves owing a balance or has a refund coming, how can I check them out of the space so I can put someone else there? I don't want to zero the account out until the last transactions have been made in order to keep the shift report right.**

A: You don't actually have to do a "check out" in order to put the next reservation in the site or check the next one in (though there may be warnings or restrictions based on the operator's Access Level). Of course if they leave before their scheduled date and you need to get them out of the way, then you should adjust the Last Night accordingly for when they actually left so that someone else can be put on the site. (I assume you know that if someone is departing on the morning of the 4th then their Last Night should be the 3rd, so the next reservation can start on the 4th.)

Either way, you can just leave them Checked In until it's settled.

If you really do want to show them as "Checked Out", whether you expect payment for them or not, see this updated article in newsletter 36.

## Tips & Techniques

### Avoiding \$0 charges for add-on rates

If you use auto-rates and a lot of your reservations end up with a charge of \$0 for add-ons like Extra people or Extra pets when they have no extra people or pets, it's likely that the rate definition isn't quite correct. This is a common mistake in the understanding of the "Applies if reservation field" setting of a rate definition.

For each of your add-on rates where you have:

Applies if Resv field \_\_\_\_\_ is >= \_\_\_\_ Per each more than \_\_\_\_

The first number should generally be 1 greater than the second, for instance:

Applies if Resv field \_# Pets\_ is >= \_1\_ Per each more than \_0\_

This is because >= means "greater than OR equal to", so you only want it to use the rate if it's greater than or equal to 1 pet. For instance if you had 0 for the first number, it would try to add the rate even when there are no pets. While the total is \$0 and doesn't affect the charges, you don't really want it to show the extra pets charge of \$0 on the receipt (not to mention being needless extra junk in the database).

Likewise if you charge for any adults more than 2, the rate should look like:

Applies if Resv field \_# Adults\_ is >= \_3\_ Per each more than \_2\_



**Partial refunds to a credit card**

(This only applies if you're processing credit cards through Campground Master.)

There will be times when you need to do a partial refund to a credit card, for instance if they decide to leave early or if a mistake was found after processing the card. There are a couple ways to handle this, depending on the situation.

One way is to Void the original payment, then just run it through again with the correct amount. However this has a few drawbacks:

1. It can only be done on the same day as the original payment (before the daily settlement is done).
- 2: You probably need to have the card available to swipe again, since the Void will delete the original payment along with its credit card information.
3. It's possible that it may not be approved the second time, since the amount of the original payment is still "held" until settlement. If they're close to their limit, it may not approve the additional charge.

The other way is to simply enter a Refund transaction for the difference. After adjusting the rates as needed (which should result in a negative balance for the credit due), use the "Refund" function to credit the difference to the credit card. This can be done any time, and the credit card information is available from the original payment so they don't need to be present. While not quite as "clean" in the results, it works in any situation and provides a better audit trail of information.

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**Newsletter #24 (June 21, 2006)**

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**Contents****Q & A**

- Advanced site selection in tab views
- Getting rid of "No Site" for Waiting Lists
- Installing a new printer
- Deleting some sites from a group
- Linked members staying different lengths of time

**Tips & Techniques**

- Are you using right-click effectively?
- Adding multiple sites as non-synchronized
- Resolving customer balances not matching reservation balances

## **Q & A**

### **Advanced site selection in tab views**

**Q: How can I print out just some sites from the Rack, On Site, or other views?**

A: You can set up a temporary Advanced filter for sites on each tab view. Click on the "All Site Types" drop-down list, and select the "Advanced..." item near the bottom. A Site Filtering dialog appears where you can select the exact sites you want to see, or the site types, classes, or parks. After you're done, just select "All Site Types" from the drop-down list again.

Notice that there's also a "Default..." item in the list. This works the same way, except that it keeps that filtering to use as the default for the view from now on (until you use the "Reset Filtering (include all)" selection in the filter to clear it). Also note that this filtering is separate on each workstation, so in a networked environment you could have each workstation set up to show different sites by default.

### **Getting rid of "No Site" for Waiting Lists**

**Q: How do I get rid of the "No Site" indications on the Rack? They appear to all be Waiting list reservations but we don't want to show them on the Rack.**

A: In the Rack view, click the Options button and uncheck "Include Waiting List reservations..."

Note: It may be tempting to also uncheck "Show Unassigned reservation counts...", but we don't recommend this. If you're seeing "No Site" in the Rack unexpectedly, it's usually due to a mistake that should be corrected -- if you uncheck this box then you may not know that the mistake was made. For more information on correcting "No Site" issues, see the article in Newsletter 23.

### **Installing a new printer**

**Q: I installed a new printer but Campground Master won't print to it. How do I fix that?**

A: Depending on which types of output you want to go to the new printer, one or more printer selections may need to be updated in File / Printer Setup. For instance to use the new printer for reports, go to File / Printer Setup / Default (grid-type reports), and select the new printer. Likewise you can change the printer selection for various receipt formats, mailing labels, and envelopes.

### **Deleting some sites from a group**

**Q: How do you delete a few sites from a group reservation? For instance, a group books 6 sites, but when it is time for a deposit only 4 sites need to be reserved. How do I now release only the 2 sites back into available sites.**

A: Go into Reservation Details for each of the sites that you want to release. Check the "Canceled" box in the upper-right status area to cancel it, and then make sure you answer "No" if it asks if you want to keep them synchronized (otherwise it will cancel the whole group).

## Linked members staying different lengths of time

**Q: We have several reservations that reserve multiple sites, but they do not always stay for the same length of time at each site. For example, they might be at cabin 1 for two days and cabin 2 for three days. I want to link those so that we don't get multiple bills for them, so I can't make them non-synchronized.**

**A:** For the ones that need to be different lengths, you need to make them "sub-members" instead of synchronized. This will keep them on the same bill but allow them to be different lengths or even check in on different days.

To change this for an existing linked reservation: locate it on the Rack, right-click on it, and go to Linked Reservations -> Make this a sub-member reservation. Then you can change the dates of that one without affecting the other linked reservations, and it will still be on a single bill. Note that this can't be done on the "linked master" -- it must be done on one of the others (usually below it). If you're not sure which one is the linked master, just double-click on the reservation in the Rack. The list of linked reservations in the quick-info window will show which one is the [Linked Master].

For more information and details on making them sub-members to begin with so you don't have to change them later, see the "Groups and linked reservations" section of the documentation.

Web link: <http://campgroundmaster.com/help/groupsandlinkedreservations.html>

## Tips & Techniques

### Are you using right-click effectively?

Occasionally we find out that a user doesn't know about the right-click menus or doesn't realize how useful they are.

In general, any grid item in the tab views has a menu. Just right-click on an empty site or a name in the Rack (or even the Site name), or a transaction in the Transactions view, or any line of the On Site view, Arrivals view, etc. A menu will appear with functions that can be done for that particular item. Some of these functions are helpful shortcuts, like Check In, Extend reservation, Transactions, etc. that can save a couple steps, but some are unique functions that can only be done from the right-click menu.

For instance, a reservation can only be Split from the right-click menu. You can also batch-print receipts, labels, forms, etc. for all reservations shown in the view. Another handy function is to show all reservations for a particular site (both prior and future). Just right-click on a site name in the Rack (the left-most column) to find this function.

If you use the Meter Readings reports, note that they also have right-click functions available for adjusting the previous readings, etc.

Probably the most overlooked right-click function is "Transactions" -- available on any reservation's right-click menu, this will take you directly to the Reservation Transactions dialog for adding or editing transactions. There's no need to go through Reservation Details first. Likewise on the Transactions tab view, this will open the appropriate dialog where a transaction was originally entered, whether it's for a Reservation, Customer, Unbound, or Point of Sale. This can be handy when researching the reason for a transaction.

Don't be afraid to explore -- right-click things to see if a menu appears, and what actions are available (note that in some views, even the column you click on makes a difference).

(One word of warning: In versions prior to 4.0, right-clicking on a "blank" line in the Transactions tab view can cause it to freeze up due to a bug. If you install the update, this won't be a problem.)

### **Adding multiple sites as non-synchronized**

Many parks need to use non-synchronized linking for some groups, at least by the time they check in, so that each group member pays their own bill and/or so each group member has separate Customer information. Ideally you want to make them non-synchronized to start with to avoid having to change them later. While this isn't technically difficult, it does require that you use the correct procedure.

If you're adding sites one-by-one when making the reservation, you must uncheck "Synchronize With:" before each site is added. Some have asked that we keep this unchecked, but there's a subtle but important reason why it's re-checked after each site is added which would probably make this cause more problems than it solves.

Here's another way to do it when adding many sites at once, which may be quicker for some:

First you need to go to Maintenance / Program Options / Reservations, and check "Enable automatic multiple-site selection...". This is normally used to let the program automatically select a specified number of sites based on the preferences selected (which may also be useful at times), but this also allows overriding the way multiple sites are linked when the Add Selection(s) button is used.

Now in the New Reservation dialog, a "Qty" field will appear before the Add Selection(s) button. To add multiple sites as non-synchronized, first put a "#" character in the Qty field. (You may recall that this is the shorthand identifier for non-synced sites when a list of sites is shown.) Also make sure "Synchronize with" is not checked if you added any sites previously.

Now select (but don't double-click) multiple sites using the grid -- e.g. click-drag or Ctrl-click the sites (clicking the cell under the arrival date), so each one is highlighted in dark blue. Presumably you've also already selected the appropriate date range, reservation type and other specifics for the reservation. Now click "Add Selection(s)", and all selected sites will be added as non-synchronized. You can repeat this to add more sites (even for different date ranges), but remember to uncheck "Synchronize with" each time you add a group of sites.

To verify that they were added correctly, click on the "Sites added" list to drop it down. Each site except for the first one should have a "#" character in front of it. If you see a "=" character, then it was synchronized and you need to delete that one and re-add it (select that site so it appears next to "Sites added", then click the "Delete" button).

## Resolving customer balances not matching reservation balances

Sometimes you may see a Customer balance that doesn't match the Reservation balance (for instance a negative customer balance but a \$0 reservation balance).

There are 3 possible causes of this.

### 1. The same customer may have more than one reservation, and the balance is coming from one of the others.

From Customer Details, check Reservation History to see if the balance is coming from other reservations. There may not be any problem -- perhaps you just didn't realize there were balances on other reservations.

Otherwise, check any reservations showing an unexpected balance to see if there are missing or extra transactions. This could also be a symptom of issue #3 below (try that first if something looks wrong), or it may need to be manually corrected (keep in mind that any changes will affect reports for the dates of any changed/deleted/added transactions).

If a transaction appears to have been put on the wrong reservation, then it's possible to simply Move the transaction to the correct reservation (assuming you're using version 11.0 or later) -- see the "Move to a different reservation" function under the **Transaction History** function from Reservation Details or Customer Details.

### 2. It may be due to a transaction that's on the Customer instead of the Reservation (i.e. it was entered through Customer Details, even though there's a warning not to do so).

Through Customer Details, go to Transaction History. Scroll over to the "Reservation" column where it lists the date of each reservation. If there's no date in this column for a transaction, then it was mistakenly put on the Customer.

- If it's a duplicate transaction (e.g. you also see it properly on the Reservation, in Reservation Transactions), then you may need to delete the extra non-reservation copy in the Customer's transactions (understanding that this may affect reports).

- If it was simply put in the wrong place and needs to be moved to a Reservation (especially if it's a processed credit card transaction), then while in **Transaction History** you can simply select the transaction and click "Move to a Different Reservation or Customer" (assuming you're using version 11.0 or later). If using an earlier version, the Move function is not available -- you will have to go back to Customer Details, New / Edit Transactions and use Transfer Pmt (or Transfer Dep) to transfer the amount to the Reservation.

### 3. It might be due to a synchronization issue in the database.

Go to Maintenance / Database Maintenance, and run all 3 "Report and repair...Orphaned..." functions. If it reports any orphaned transactions, then you need to decide whether each one is a duplicate that should just be deleted, or whether it needs to be fixed (linked back to the customer or reservation it belongs to). First Delete any that should not be fixed, and then use the "Fix" function to repair the linking for the remaining transactions. Note that this is best done on the Master workstation if you're networked, followed by "Request a full database refresh" on each client computer to make sure they're in sync (orphans are most often caused by network synchronization problems, so any orphan probably indicates that the databases aren't synchronized).

## Newsletter #25 (Aug 1, 2006)

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### Contents

#### **Q & A**

- Printing in Landscape Orientation
- Sorting Waiting Lists by Date Added
- Keeping Reservation Notes separate from Customer Notes
- Seeing/adding auto-charges for all future reservations
- Swapping sites when nothing is available

#### **Tips & Techniques**

- Receipts by Category report adjustments
- Restoring from an old backup on purpose
- Adding a column to the Rack View
- Adding fields to the Arrivals tab view

#### **Q & A**

#### **Printing in Landscape Orientation**

**Q: Is there a way that I can change the page orientation to landscape for reports? I tried change it in the print screen, but then it doesn't print all of the pages.**

A: If you change the orientation after the preview then it doesn't know that the number of pages required for the report might change -- so the trick is to change the default orientation so the preview will also be in landscape mode. Go to File / Printer Setup / Default (grid-type-reports), and set the orientation to landscape there. Now it will print as desired.

By the way, this is also where you can select different printers to use as defaults for various printing tasks, and set other preferences. Note that these settings only affect Campground Master, not other programs. However it must be done on each computer separately (e.g. if you're networked).

#### **Sorting Waiting Lists by Date Added**

**Q: For our waiting list, how can we sort by date added? We want to give preference to the people that have been on the list the longest.**

A: On the Non-Reserved tab view, click the Options button. Check the boxes for Date Made and Time Made to show those fields, and click Save. Then you can sort by clicking on the Date Made column header.

## Keeping Reservation Notes separate from Customer Notes

**Q: Lots of times we want notes on the reservation screen for just that one reservation and not on the customer screen. When we type it on the reservation screen only, it still appears on the customer screen most of the time.**

A: If you type in notes when \*making\* the reservation (in the New Reservation dialog), they are copied into the Customer's notes as you say. However if you go back later into Reservation Details (or for instance click "Continue to Details" on the New Reservation dialog), then you can edit the notes there without it affecting the Customer's notes.

## Seeing/adding auto-charges for all future reservations

**Q: Is there a way to do a bulk Auto Calculate for all of the reservations that were already put in the system other than going into each reservation and doing it manually?**

A: There isn't a way to actually add the auto-calculated charges for all reservations at once. However if you just want to see the auto-calculated amounts (e.g. to make sure your rates are working), you can select the "Auto-charges" column for the On Site tab view (through the Options button). This does the auto-calculate for each one and shows the amount without actually adding the charges. However you may not want to leave this field enabled all the time, since it can take significant time to calculate and refresh the display.

## Swapping sites when nothing is available

**Q: We want to change reservations around (switch two people's sites) which we normally do by moving one to an empty site first, moving the second one to the first site, then moving the first one back to the second site. But we're completely full so I can't find an empty site to use as a temporary holding place. How can I swap them?**

A: Go to Assign or Change Site for the first one as usual, and make sure "Show Available" is \*not\* checked so you can see the other reservation you're wanting to swap with. Right-click on that reservation and select "Swap sites with this reservation".

If for some reason that would create a conflict (e.g. one is longer than the other so you have to move two people out of the way first), then you could "remove" one temporarily using a one of these more indirect methods -- either make it unassigned (Assign/Change site but don't select a new site), or change the status to "Can't book" (then you'll need to locate it again later using Find Reservation or the Non-Reserved tab view).

## Tips & Techniques

### Receipts by Category report adjustments

We get a lot of questions about the amounts reported in the "Receipts by Category" report. Sometimes the amounts in a particular category don't seem correct (e.g. a payment amount doesn't go into the category as expected), or an amount appears in "Uncategorized" and it's not clear why.

The original article here is now included in the normal documentation (greatly expanded), so refer to that under [Dynamic Interactive Report Screens](#) / [Transactions](#) / [Receipts by Category](#).

## Restoring from an old backup on purpose

There may be a time when you actually want to restore an older backup -- for instance if you made a bunch of major changes just for testing (or you goofed), and you want to restore the database to its previous state. Normally when you restore the data, it asks if you want to re-apply the changes again from the log (or worse yet, it gets them automatically from the network).

Here's how you can keep them from coming back (and keep it from asking to apply changes):

Since you're going backwards it normally assumes you want to get up to date (e.g. you restored from an older backup and so it wants to recover the changes since then also). It's actually getting them from the log files, which are also on each computer if you're networked, but since each client also has a "newer" database than you want then you would have to wipe that out too.

The only way to go backwards with a restore is to follow these steps (requires knowledge of Windows / file functions, so have your computer tech do it):

1. With Campground Master closed, delete all log files from *\*each\** computer (the log files have a PRKLOG extension, and are located in the same folder as the database file -- so delete \*.prklog).
2. Start Campground Master (on the master, if you're networked), and Restore the old database using Maintenance / Restore. If you're networking, restore to the Master workstation first. It won't be able to refresh from the clients now that all of the logs are deleted.
3. Also if you're networking, go to *\*each\** client and do Maintenance / Network Functions / Request a full database refresh -- this copies the whole database from the server to each client, wiping out the "newer" version they had).

## Adding a column to the Rack View

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

With the new customizations in version 4.0, one of the things you can do easily is add another column to the Rack view. For instance, you might like to show the site's length, or Site Class, or whether it has 50A service. You can actually add as many columns as you want, but of course this reduces the amount of space for showing the dates in the Rack.

Here is an example of adding the Site Class field -- other Site fields can be added the same way.

1. Go to Maintenance / Advanced Customizations / Queries.
2. Click Add Query, and select List Query.
3. Enter a name, such as "Rack Columns"
4. Select "Sites" for the Base table.
5. Click "Quick-Add Fields"
6. Select the "Site Class" field in the Data Field column, and click the left-arrow button (or you can just double-click the Site Class field). You should see it appear under Fields Selected as "Campsites:Attrib\_Site\_Use".



7. Click Done, and you'll see it in the Query Columns table.

8. Just to make it neater, select the line in the list ("Site Class") and click Edit Column, then change the Column Heading to just "Class", and select "Center" for the Align Text option. Click Save / Close all the way out.

9. Click the Options button on the Rack, and in the list "Query to insert with additional site info" select the query name you just added.

Now you should see the extra column for Class in the Rack view. If you want more columns, just edit the Query to add additional fields.

### Adding fields to the Arrivals tab view

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

Adding fields to other tab views is similar to adding the column in the Rack view (covered in the previous topic). The only difference is that a different Base Table is needed -- for the Transactions tab view the base table of the added Query must be Transactions, and for all other tab views like the Arrivals tab it must be Reservations.

Here is an example of adding the Paid-Thru date to the Arrivals tab view.

1. Go to Maintenance /Advanced Customizations / Queries.

2. Click Add Query, and select List Query.

3. Enter a name, such as "Arrivals Extra"

4. Select "Reservations" for the Base table.

5. Click "Quick-Add Fields"

6. Select the "Paid Thru" field in the Data Field column, and click the left-arrow button (or you can just double-click the Paid Thru field). You should see it appear under Fields Selected as "Reservations:Resv\_Paid\_Thru". You can add as many extra fields as you want to see. Note: If you were adding a Customer field you would select the "Customers" table when quick-adding fields, and of course for Site fields you would select Sites.

7. Click Done, and you'll see the added field(s) in the Query Columns table.

8. Just to make it neater, select the line in the list ("Paid Thru") and click Edit Column, select "Center" for the Align Text option. Click Save / Close all the way out of Query Setup.

9. Click the Options button on the Arrivals tab view, and in the list "Query to insert with additional info" select the query name you just added.

Now you should see the extra column at the far right. If you want more columns, just edit the Query to add additional fields. While there isn't a way to insert columns to a specific place, you can achieve the same thing by removing some of the checked "Fields to show" under the Options and just include them in your query instead.

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## Newsletter #26 (Aug 27, 2006)

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- Printing a list of available sites
- Miscellaneous refunds from the cash drawer
- Owners can't be checked in

#### **Tips & Techniques -- Simple customizations for Version 4.0**

- Color-coding the Sites on the Rack
- Forcing Reservation fields to be filled in
- Showing a "Rules" prompt when making a reservation
- Showing Reservation Notes upon Check-in

#### **Q & A**

##### **Showing more dates in the Rack**

**Q: The Rack only scrolls far enough to see 3 months ahead. Can I extend it to see more without having to change the "To" date each time?**

A: Yes, it can include up to a year in advance (and 3 months behind) by default. Click the "Options" button on the Rack and change the "Default future days" and "Default past days" to suit your preferences. Just be aware that the more days it includes, the slower it will be (which is the main reason it's limited by default), so if you don't need to see that far ahead very often then it might be better to just change the "To" date when you need to see farther. Since machines are getting faster, though, the next version will allow the default future and past days to be up to 999.

##### **Printing a list of available sites**

**Q: How can I print a sites available list to give to customers, so they can drive thru the park and look at sites that are available during their time frame.**

A: Put the time frame needed in the "From" and "To" dates on the Rack, then check "Available Only" to show only those available, and also check "Show Range" so that it only shows those dates. Then you can print that list for the customer (File / Print, or click the printer icon on the toolbar).

### Miscellaneous refunds from the cash drawer

**Q: How can I enter a credit for pop machine refunds, and show that the money was given to them from our cash drawer balance?**

A: This is basically like entering a negative sale. Use the P.O.S. if you have it, or else use Unbound Transactions (basically just click the cash register icon in the toolbar). Enter a Charge transaction with a negative amount (so it's like a return) and select an appropriate category, and then enter a Refund transaction to show money removed from cash drawer. If you can't enter a negative charge then you can also use a Credit transaction, though this is less desirable for reporting reasons.

### Owners can't be checked in

**Q: It seems when I set up a Reservation under an "Owner" type, it does not allow the check-in option to work. What am I doing wrong?**

A: "Owner" reservation types are intended for people who actually own a lot (e.g. in situations where they might sub-lease it or at least not be on the site constantly). As such, this type of reservation is typically entered as a multi-year reservation just to track the lot owner, which also allows putting various charges toward the owner of the lot instead of the current renter/occupant. This is only a "background" reservation and does not affect the availability of the site, although the owner's name will appear on the Rack in a light grey color (there is also an option to hide the owner names if desired).

Therefore there is no checked-in or checked-out status for owners, since they're not assumed to be there all the time anyway. Owner reservations could also be use for "seasonal" reservations where someone rents the site for the season but only come on weekends, for instance.

So now when making a reservation for someone actually staying on the site, or to track the actual occupancy of the "owner" himself, a Normal type reservation should be used (on "top" of the Owner reservation). Of course Monthly or other types can also be used, as long as it's not another Owner reservation.

## Tips & Techniques

### Color-coding the Sites on the Rack

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<https://campgroundmaster.com/help/overview32.html>

In version 4.0 you can define custom Color Schemes to be used many places. One simple example of this is color-coding the Site and/or Type columns of the Rack for better clarity of the type of site, or even change the color based on some other attribute of the site. It would be easy to get carried away with the possibilities, so you probably want to keep it simple and just consider the most important factors.

There's already a sample color scheme that you can import, which colors the sites by Site Type. With a little experimentation in the sample and by changing the field used in the expressions, you could define different colors for each site, or different colors based on some other site attribute field like "50A".

First you need to import the sample -- see the documentation under Maintenance / Advanced Customizations / Color Schemes for basic info and information on importing the samples. Here's an online link:  
<http://campgroundmaster.com/help/colorschemes.html>

The sample file to look for when importing is "Sample Color Scheme - Rack sites, by type".

Once you have the sample imported, go to Maintenance / Advanced Customizations / Select Global Color Schemes. For the entry "Override Site headings with color scheme", select the color scheme imported above and then Save it. Assuming you still use any of the original Site Types, then some of the sites should change color. To tailor it to your own Site Types pick list entry names, go back to the Color Schemes setup and edit the rules for each color -- e.g. change the names in the Condition expression to match the actual Site Types you use. Of course you can also change the colors used, as well as add or delete colors, etc. as needed.

### Forcing Reservation fields to be filled in

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<https://campgroundmaster.com/help/overview32.html>*

Some users have asked if it's possible to force certain fields to be filled in, for instance to not allow a reservation be completed without the # Adults and # Children numbers filled in. This is possible in version 4.0 through the Dialogs definitions.

1. The first step is to add a Dialog definition that's an Add-on to the New Reservation dialog. Go to Maintenance / Advanced Customizations / Dialogs, and click "Add dialog definition".

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition then you would just add elements on to the existing one instead of creating a new one here (in which case, skip to step 3).

2. Give it a name, such as "New Reservation add-on". Then check the "Add-on" box and select "New Reservation" from the list. We're not adding any new controls to it, so the Width and Height values can remain 0.

3. Now we need to add an action to the dialog that checks the # Adults field, showing an error message and preventing the reservation from being saved if # Adults is blank. Click "Add Element", and for the element type select "Action on data saved".

4. We don't really need a Condition for this element (we always want it to force the field), though you might want to add a condition so that only non-administrators are restricted, for instance.. In that case you could put in the following Condition:

```
CurrentOpLevel() < 5
```

5. Now for the Action expression, which will be executed when the reservation is saved (e.g. "Done", "Continue", or any other button clicked that would normally save the reservation). We won't go into the design details, but it should be fairly self-explanatory if you look up the components in the Function Reference of the Advanced Customizations documentation. Also note that we need the Control ID of the # Adults field, which can be looked up in the Dialog Control ID reference. This can be found online here: <http://campgroundmaster.com/help/basedialogs.html>.

Enter this for the Action expression:

```
IIFQ( Empty(DlgGetCtrlText(1079)),  
      'Eval(MessageBox("# Adults must be filled in",0,2), DlgSetFocusCtrl(1079), .F.)',  
      '.T.') )
```

A few notes about the expression:

- It's broken into 3 lines for readability here, but it must be continuous (no line breaks) when you enter it.
- IIFQ is used instead of IIF, because we don't want both of the result expressions to be evaluated (which would result in the error showing up no matter what).
- If the "Adults" field is empty, it does the Eval( ) function, else it simply returns True.
- The Eval function does 3 things in sequence: Shows the error message, sets the keyboard focus to the field (for convenience), and returns False to abort the saving process.

6. We also need to check both of the boxes -- "Execute the action before..." and "Abort the operation...". Obviously we want to make sure this condition is met before actually saving the reservation, and if the # Adults is not filled in then we don't want to save the reservation yet.

7. Now just Save the element, and we're done with the customization for checking the # Adults field. You can easily Copy the element to do the same check on the Children field (just change the Control ID to 1080, and change the error message text), or any other verifications you want to do. Once you're all finished, just Save everything and try it out.

### Showing a "Rules" prompt when making a reservation.

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*through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:*  
<https://campgroundmaster.com/help/overview32.html>

The previous example of modifying the New Reservation dialog to add extra prompts can also be extended or other special cases. (Version 4.0 required.)

This example shows how to add a prompt for the reservationist to read certain rules to the person reserving the site, before continuing.

1. The first step is to add a Dialog definition that's an Add-on to the New Reservation dialog. Go to Maintenance / Advanced Customizations / Dialogs, and click "Add dialog definition".

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition, e.g. from the previous example, then you would just Edit the existing one and add Elements to it, instead of creating a new one here (skip to step 3).

2. Give it a name, such as "New Reservation add-on". Then check the "Add-on" box and select "New Reservation" from the list. We're not adding any new controls to it, so the Width and Height values can remain 0.

3. Now we need to add an action to the dialog that shows a prompt every time they save the reservation. Click "Add Element", and for the element type select "Action on data saved".

4. We don't really need a Condition for this element (we always want it to show the prompt). Even though we might not want to show it based on certain things about the reservation, we can't put this in the Condition expression because the Condition is only evaluated when the dialog is first created, not when the action is triggered.

5. Now we need to add an Action expression, which will be executed when the reservation is saved (e.g. "Done", "Continue", or any other button clicked that would normally save the reservation). Enter the following Action expression to show a prompt with a simple OK button:

```
MessageBox("TELL THE CUSTOMER: \n\n Deposit is due in 10 days.")
```

Note that you can add as much text as you want in the message, but you can't enter line breaks when you type the expression text. Instead, insert the characters "\n" wherever you want to start a new line (two in a row, as shown above, makes a blank line).

6. Now just Save the element, and we're done with the customization.

## Showing Reservation Notes upon check-in

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When a reservation is checked in, it might be nice to show a pop-up window with any Notes that reservation has -- especially if the customer's Warning Flag is set. This example shows how you can create an Event Action to do that in version 4.0.

1. The first step is to add an Event Action. Go to Maintenance / Advanced Customizations / Event Actions, and click "Add event action".
2. Give it a name, such as "Check-In Warning & Notes".
3. For the Event Trigger, select "Check-in reservation, before". We want to do it before the check-in process is done, in case the notes impact how we handle the check-in. We're also going to add an option to this action which allows the operator to cancel the check-in, so that's another reason it must be a "before" trigger.
4. We only want to do this action if they have the warning flag checked, so enter this for the Condition:

```
Cust:Cust_Warning_Flag = .T.
```

(Technically you could leave out the "= .T." part since the boolean result would be the same either way, but this is included here for clarity.)

5. Now for the action expression -- we want to show a Yes/No prompt which shows that the customer has a warning flag, show any Reservation Notes along with that, and offer the option to continue the check-in or not. This can all be done with this expression:

```
MessageBox( "Customer has a warning flag! \n\n Reservation Notes: \n\n" +  
    Resv:Resv_Notes + "\n\n Continue with Check-In?", 2, 1) = 2
```

A few notes about the expression:

- It's broken into 2 lines for readability here, but it must be continuous when you enter it.
- Text values are concatenated simply by using "+" between them as shown above
- Insert the characters "\n" wherever you want to start a new line (two in a row, as shown above, makes a blank line).
- It's not actually necessary to have spaces around the "\n", that's just for readability
- The "2, 1" parameters at the end tell it to have Yes/No options and show a warning icon
- We compare the result with 2, which is the value returned if Yes is clicked. Thus if they click No, this expression returns False.

6. We also need to check the box "Abort the event or operation...", so if they don't answer Yes then the check-in does not continue.

### **Simplified to always show notes:**

If you only want to show the notes (if any) but you don't care about whether the warning flag is set and you don't need to abort the check-in, then make these changes:

Replace the condition in step 4 with:

```
!Empty(Resv:Resv_Notes)
```

Simplify the expression in step 5 to:

```
MessageBox( "Reservation Notes: \n\n" + Resv:Resv_Notes)
```

Don't check the "Abort..." box in step 6

In fact, you might want to do both -- show the message with the option to cancel if they have a warning, otherwise just show the notes if they have any. In this case, you can use two separate Event Actions. The first one would be the original Event Action covered above, and the second one would be the simplified version with one change to the Condition:

```
!Empty(Resv:Resv_Notes) AND !Cust:Cust_Warning_Flag
```

This way it won't show the notes twice if they do have a warning flag (assuming they click 'Yes' to continue anyway).

You may think of other things that you want to validate upon check-in, so you can add other Event Actions as needed -- you can have as many Events as you like, even for the same trigger, and they will all be executed in sequence (unless one "aborts" the operation as this one could do, of course).

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## Newsletter #27 (Sep 25, 2006)

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### **Q & A**

#### **Transaction Categories for Taxes**

**Q: When I run a category-based report such as Charges by Category, the taxes (like Sales Tax) aren't showing up in the right place.**

A: This is probably due to the Taxes setup (Maintenance / Park Setup / Taxes). You need to make sure that appropriate categories are selected for each different kind of tax you have, because that category determines how the tax will be reported. For example, don't select things like "Daily Rate" or "Giftshop" for the Category of the taxes, because that will cause the tax to be combined with charges for those categories. Use categories like "Sales Tax", "Transient Tax", "Lodging Tax", "GST", "VAT", etc.

If you need to add more appropriate categories for taxes, you can do that through Maintenance / Pick Lists / Transaction Categories. Note that changing the category selection in the Taxes setup will not automatically fix any previous transactions. You would have to go back and manually change the Category used for each tax transaction to correct the history.

**For more information, refer to the documentation under Taxes Setup.**



### Reporting by Rate type

**Q: How do we make our reports show the type of rate used -- e.g. instead of just putting everything in "Daily Rate", we want to show the income separately for extra persons, holiday rates, membership rates, etc.**

A: The Rate information is not part of reporting -- only the Category of the Charge transaction inside the rate definition is used. Thus you may need to add more categories (in Maintenance / Pick Lists / Transaction Categories), and then go through each of your Rates definitions and select the appropriate category for the Charge in each rate.

### Getting back to the Transactions detail

**Q: After I do a transaction report like Receipts by Payment Method, how do I get the Transactions tab view back to showing all of the transactions?**

A: First click on the "Summarize" checkbox to uncheck it -- this changes it to detail mode, showing all of the transactions included in the current report (this is handy for investigating where particular summary amounts came from, by the way). Then you also need to clear the filtering so it shows all transactions -- click on "More Filters", then click "Reset Filtering (include all)" and "OK". Finally, you may want to click on the Date column header to sort the transactions by date/time.

### Splitting a payment between payment methods

**Q: How do I enter part of the payment as cash and part by credit card? When I try to enter the partial payment amount it gives an error message.**

A: You need to enter the partial payment in the "Amount to pay" box, not the "Amt Tendered" box. For instance if they pay \$50 by cash and put the rest on credit card, then first enter a Cash payment with \$50 in the "Amount to pay" (delete the default value shown there and enter 50). Note: In more recent versions, you can also enter it in the Amt tendered and then just "OK" the warning that appears. Now click Payment again to enter the second part of the payment, and the amount to pay will automatically reflect the new balance to be paid by another method.

### "Balance" report showing strange dates

**Q: When I generate the transaction report "Balance Charges and Payments" and select a date range of 8/1/2006 – 8/31/2006, I get other dates in the report. Where are these dates coming from?**

A: The "Balance Charges and Payments" report uses the Reservation date to filter the transactions to be shown, not the Transaction date -- so it's showing all transactions for any reservations that started in August. This particular report is mainly for checking that reservations are zeroed-out properly. You can change this if you want by going into More Filters (after selecting the Quick-report), and then uncheck the "Use Reservation date..." box. If you need to do this often, then you can Memorize the report through Summary Options.

## Tips & Techniques

### Using Purge to shrink the database

When your database starts getting pretty large, you'll probably notice things slowing down. In fact it can suddenly slow to a crawl if it starts reaching the limit of your computer's RAM, causing Windows to swap part of it out to disk.

The obvious solution to this is to use the Purge function (under the Maintenance menu) to clear out old data. However there's a bit of a catch -- if you're already slowing down, especially if you're hitting the RAM limit, then it will have a hard time purging because the purge function itself takes a lot of RAM (for queuing up all of the changes to be recorded in the log and possibly transmitting them over the network).

Here are a few tips for purging:

First, make sure you have a good backup of your current data, which should be stored in a safe place (this is your business' historical data, so don't take it lightly). The more backups the better, and don't be afraid to use the Restore function to test the backups. You can use these backups later if necessary to look at older data (preferably on a different computer, so it doesn't risk affecting the live system).

When possible, start using the Purge function before you really need to. For instance if you're still running fine after a few years, don't wait for it to slow down -- purge any data older than 2 years before it starts slowing down.

If you're networked, only use the Purge function on the Master workstation. Make sure no other activity is necessary on any workstation (do it after hours).

Purge in small increments, starting from the earliest date. For instance if you have transactions going back to January 2002, then start with a "purge before" date of March 2002 to only purge a few months, then run Purge again with a date of June 2002, then September 2002, etc. This will help minimize the amount of RAM needed each time, as well as the size of the updates sent to other workstations if you're networked.

Advanced notes for networking:

A long delay after each purge to synchronize the changes is normal (perhaps several minutes, depending on the network). However if it has extreme trouble sending the changes to other workstations, even when purging in very small increments, then you may need to do the following: Close down all clients, finish the purging on the Master, then manually copy the new database to each client so it doesn't have to synchronize.

You may also want to delete the log file created on the day of purging, since this can cause it to take a long time starting up ("validating" from the large log file). Look for the "PRKLOG" file in the same folder as the database, for the date of the purge. It's safe to delete the log as long as you have sufficient database backups -- the clients will automatically do a "full database refresh" since they can't synchronize from the log file, so this is also an alternative to copying the database to each client (just be sure that each client is brought up separately and given time to receive the database refresh before starting the next client).

### Keeping operators from closing the program

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<https://campgroundmaster.com/help/overview32.html>

Here is an example of using the new Events customizations in version 4.0 to prevent non-manager operators from closing Campground Master accidentally. Of course they could always shut off the computer if they want to shut it down, but this may help avoid accidental closures due to "fumbles" with the mouse or keyboard, for instance.

1. The first step is to add an Event Action. Go to Maintenance / Advanced Customizations / Event Actions, and click "Add event action".
2. Give it a name, such as "Avoid shut-down".
3. For the Event Trigger, select "Program Shutdown".
4. We only want to prevent it for non-managers, so enter the following expression in the Condition (note that Manager access is level 4):

```
CurrentOpLevel() < 4
```

5. We want to show them that it's not allowed, and also make sure the action is aborted, so enter this in the Action expression:

```
Eval(MessageBox("You are not allowed to close this program"), .F.)
```

6. Finally, make sure the "Abort..." box is checked -- since the action expression above always returns False, the shut-down will always be aborted (assuming the Condition is met to trigger the action in the first place).

### Inventory report with total cost/value

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The standard inventory reports don't show the total value of all inventory on hand, but that's easily solved by creating a simple Query (part of the new Advanced Customizations functions added in version 4.0).

1. The first step is to add a Query. Go to Maintenance / Advanced Customizations / Queries, and click "Add Query".
2. Select "List Query".
3. Give it a name, such as "Inventory total value".
4. For the Base table, select "Inventory items".
5. For the Access Level, select "Manager" (this is optional of course, but recommended).
6. Click "Quick-Add Fields", and select the basic fields you want such as Item Description, Inventory Code, Vendor, On Hand, and Cost. (To select a field just double-click on it, or else click once to select it and then click the "-->" button.). Click Done when finished adding fields.
7. Now we need to add the special column for total values. Click "Add Column", and enter this for the Expression:

```
FieldValue(This(), "Inv_Cost") * FieldValue(This(), "Inv_Qty")
```

8. Put "Total Value" in the Column Heading, and select "Currency" for the Format. Click "Save" to add the column.
9. We want to avoid a blank line between each item, so some columns need to be edited. Double-click on the item in the list that has "Item Description" as the column heading (to edit that query column), then uncheck the "Blank lines between sorted groups" box near the bottom, then Save it. Also do this for the "Item Code" column.

That's all there is to it -- you can see the results immediately by clicking "Save & Test Query results". Once you're finished and Save back to the main screen, you should see a "Query" tab view (if there wasn't one there already), just to the left of the Transactions tab on the far right. Click on the Query tab and select your new query from the drop-down list at the top to view the report any time you need to see the total inventory value.

### Adding right-click menu items for +1W and +1M

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<https://campgroundmaster.com/help/overview32.html>

There are buttons on the Reservation Details dialog for easily adding 1 week or 1 month to the reservation, but it could be even more convenient to put these functions on the right-click menu in the Rack. This can be done by adding a Menu customization (version 4.0 required).

1. The first step is to add a custom Menu definition. Go to Maintenance / Advanced Customizations / Menus, and click "Add menu definition".
2. Enter a name, such as "+1's for Rack".
3. Select "Right-click, Reservation, on Rack" for the Base Menu.
4. To put the new selections in a suitable place, enter 21 for the Insert position
5. Click "Add menu item", and leave the default selections "Execute Action" and "Enter as static text".
6. Select "Reservations" for the access level (optional but recommended).
7. For the Selection name, enter "+1 Week".
8. For the Action expression, enter this expression to make the Last Night 7 days later:

```
SetFieldDate(Resv(), "Resv_Last_Date", Resv:Resv_Last_Date + 7)
```

9. Save that item, then "Add menu item" again for the next one (repeat steps 5 and 6 above).
10. Enter "+1 Month" for the selection name.
11. Enter this for the Action expression (note the use of the handy GoMonth function, since months are different lengths):

```
SetFieldDate(Resv(), "Resv_Last_Date", GoMonth(Resv:Resv_Last_Date, 1))
```

We're finished -- Save/Close all of the dialogs. Now if you right-click a reservation on the Rack you'll see these new entries.

NOTE: This simple example does not offer any confirmation prompts or check for conflicts (these things could be added but would be much more complex) -- it will immediately change the reservation date, so be sure to double-check the site availability before using it. Neither will it re-calculate the charges automatically (assuming you have that Auto-rates option enabled). This is presented as an example of modifying the menus, not necessarily as a complete new function, so use it with care.

## Adding new fields to the Customer Details dialog

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<https://campgroundmaster.com/help/overview32.html>

Adding new customer information fields is relatively simple in version 4, through Maintenance / Data Field Definitions / Customer Fields (refer to that function's documentation). However the fields aren't much use unless you can enter data for them (and see what was entered). So the next step is to add them on the Customer Details dialog.

This example assumes that you've already added some new Customer data fields, and will show how to add them to the Customer Details dialog -- for simplicity we will make the dialog wider and use Quick-Add to put the new fields in a column along the right-hand side, but you could insert them anywhere you can find room.

1. The first step is to add a Dialog definition that's an Add-on to the Customer Details dialog. Go to Maintenance / Advanced Customizations / Dialogs, and click "Add dialog definition".

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition then you would just add elements on to the existing one instead of creating a new one here (in which case, skip to step 3).

2. Give it a name, such as "Customer Details add-on". Then check the "Add-on" box and select "Customer Details" from the list. Also make sure the "Enabled" box is checked.

3. Enter 150 for the Width (which will add 150 pixels to the width of the dialog).

4. We want to add all of the custom fields in one step (there is room for up to 14 new fields in this example). Click "Quick-Add Fields", and enter these figures in the boxes: Starting top position:70, Labels left position:620, Entry fields left position:690, Entry field maximum length:100, Vertical spacing:25. Then click "Continue..."

Note: If you know that the screen resolution is more than 800x600, you could increase the Width figure in step 3, as well as the Entry field left position and/or the Entry field maximum length in step 4.

5. Select all of your custom fields (in the order you want them to appear) -- the easiest way is to double-click on each field in the left-hand list to add them to the right-hand list. Click "Done" when all the fields you want are added to the right-hand list.

6. We also want to move the Save and Cancel buttons, since we made the dialog larger. Start by clicking "Add Element". Select "Move Control" for the Element type, and enter these values -- Control ID: 1, Left: 720, Top: 10. Click "Save".

7. Click "Add Element" again, select "Move Control" for the Element type, and enter these values -- Control ID: 2, Left: 720, Top: 40. Click "Save".

OK, now you're ready to test it. Click "Save & Test dialog" to see what it looks like. You may need to do some editing of the labels (the Static text controls) and maybe adjust some sizes or positions, but that should be a good start.

Note that the Quick-add function did a lot of the "hard" work of entering appropriate expressions to load and save the data to the appropriate fields, etc. You can take a look at the element definitions to see how it actually does it.

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## Newsletter #28 (July 19, 2007)

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## What's New

### Expression text parsing change in version 4.2

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<https://campgroundmaster.com/help/overview32.html>

In order to correct a problem with "escape sequence" parsing in text expressions, a change had to be made which might impact existing expressions.

**NOTE: This only affects the Advanced Customizations such as Queries, Events, Dialogs, etc. that you might have added yourself, so this change won't affect most users.**

The change is that escape-sequences like \r and \n in quoted text are now converted in the parsing stage rather than the execution stage. Thus any text variables, data fields, etc. are considered already converted when passed to the functions MessageBox and SendMail (these are the only two functions that this directly affected, at least for the \r and \n character escapes). The primary effect of this on existing code is that if a backslash character is used in nested quotes (either for escapes or for other things like file paths), it must be double-escaped now.

Here is an example -- in previous versions, this expression would work:

```
EvalQ( 'MessageBox("First line \n Second line")')
```

Now in version 4.2, the parameter 'MessageBox(...)' inside EvalQ is parsed as quoted text before execution by EvalQ, so the \n is converted before parsing the parameter of the MessageBox function and the resulting line feed would break the expression (a line feed signals the end of an expression).

In version 4.2 and later, you need to change it to have two backslashes so that the "\\" is converted to "\":

```
EvalQ( 'MessageBox("First line \\n Second line")')
```

Thus after parsing first set of quotes it will result in the correct expression:

```
MessageBox("First line \n Second line")
```

And then of course the text will be given to MessageBox with a proper line feed in it (\n is converted to a line feed), resulting in 2 lines of text in the message box.

In summary, if you have any text in expressions that contain backslash characters, and if the expression contains more than one level of quotes, you need to double up the backslashes for each level of quotes.

### Optimization for busy POS environments

If you use the POS functionality and have some items that are sold very frequently like ice or day passes, there can be a significant bottleneck in the program after awhile -- especially noticeable in the form of network delays.

This is a result of a field in the inventory items data which keeps a list of all transactions done for each item. This list can of course get very large, with thousands of links in it, and this entire list has to be updated and synchronized each time the item is sold. The temporary solution has been to use Purge Old Data to minimize the size of the field, which can help quite a bit but is not ideal.

In version 4.2.2, we made it possible to eliminate this field so there is no impact on speed when doing sales. All you have to do is go into Maintenance / Data Field Definitions / Inventory Item Fields, and change the status of the "Inv\_Link\_List\_Trans" field to "Disabled".

#### HOWEVER, you should be aware of these side effects:

1. This is not reversible -- although the field can be re-enabled, all previous data in it will be lost (causing the reports mentioned below to be inconsistent).
2. This will cause the Old Stock report to be extremely slow -- it may take several minutes to bring it up (and if you try to sort by Date Last Sold, it may take hours).
3. Other POS reports that allow filtering inventory items will also be very slow if the Inventory Filtering includes a filter by date sold or number of days since last sold.

If these report issues are not a concern, then we recommend disabling that field as mentioned to minimize network delays. In future versions we will use dynamic indexing of the transactions so that the reports won't be slow, and at that time the field will be completely removed anyway.

## Q & A

### Viewing the full credit card number

**Q: After upgrading I can only see the last 4 digits of credit card numbers. How can I see the whole credit card number again?**

A: One of the changes in version 4.2 is that credit card numbers are "masked" for low-level operators -- only the first digit and last 4 digits of the credit card information are visible after it's initially entered. This was changed to increase security and for compliance with merchant rules.

Actually the masking is simply on by default for operators which don't have Administrator access, so the simple workaround is to log in as an administrator when needed. Administrators will still see the full number (so of course it's important to make sure that clerks don't know an Administrator level login).

One other exception is that the credit card number in the Reservation Guarantee Info will be visible by Manager level operators as long as the reservation is not yet checked in or canceled, so for instance a cancellation charge can be put on the card by a manager if needed. Be sure to get the card information before you actually cancel the reservation, though, since it's masked after cancellation.



You can also change these access levels if you prefer -- just be aware of the security implications if you do. In Maintenance / Park Setup / Access Levels, look for the series of functions that start with "CC number masking --" and change them as needed.

Note that if you're processing credit cards through Campground Master then it's not necessary to see the full card number in order to put a Payment or Deposit on that previously entered card, in which case there's little reason for anyone to be able to see the full card number.

### Printing only some transactions

**Q: I want to print just the last few transactions for a reservation. When I click "Print only some transactions", it just prints the last one which isn't enough. How do I print more without printing all of them?**

A: Note the "Print:" options next to that button. There are 4 options for designating what you want to print (New, Since last zero-balance, etc.). Most likely you can use the "Since date" option and enter an appropriate date. The other options might be useful for monthly renters, etc. More detailed information on these options can be found in the documentation.

### Re-using a CD-RW for backup

**Q: The first time I backed up to a CD-RW disk it worked fine. Now when I try it I get an error message. Isn't it supposed to be able to re-use the CD?**

A: You need to either enter a different file name each time you make a backup to the same CD, or else re-format the CD (through Windows). Unlike floppies or USB flash memory drives, it's generally not possible to overwrite an existing file on a CD (with the same name) without reformatting it first.

If using a different name doesn't help, it might also be that Windows is configured to "Close" the disk each time, preventing further re-writes. Again, re-formatting the CD should work.

### Removing unused receipt formats

**Q: We only use a couple of the receipt formats shown in the drop-down list (in Reservation Transactions for instance). How can I remove the ones I don't need?**

A: If you have version 4.0 or later, these are called Forms -- you can disable the unused Forms so they don't show up (you can also delete them, but we don't recommend this in case you want to use them later).

Go to Maintenance / Advanced Customizations / Forms. For each of the receipt formats you want to hide, select it and "Edit form definition" (or just double-click on it), then uncheck the "Enabled" box in the Edit Form Definition dialog, and click Save. Note that mailing labels, envelopes, and E-mail confirmations are also listed here but they won't show on the drop-down receipts list, so don't disable those by mistake.

### Marking sites for special use

**Q: We want to flag some sites for use only under certain conditions, like a special event. We need them to be available for reservations, but we want to show them with an event name or special color so the operators know they aren't to be used for normal reservations. How can we do that?**

A: Probably the best way to do this is to put an Owner reservation on the sites, with the name of the event. Owner reservations will show up on the Rack (assuming you have that option checked in the Options on the

Rack), but will still allow normal reservations to be made on top of them. It's as if the event "owns" the sites for that period, but they can still be rented out.

First you need to make sure that at least one Owner reservation type is enabled -- see Maintenance / Pick Lists / Reservation Types. If you prefer, you can add a special reservation type for the event or rename the Owner type -- just make sure the Base type is "Owner".

Now make a reservation on the site like you normally would, but select Owner (or your special type) from the "Resv Type" list. Make sure the Last name of the customer (e.g. a fake customer) is what you want to show on the Rack.

To make the real customer reservations in those sites, you can double-click in the space like you normally would to start a reservation, or right-click and select "New Reservation for this site (non-owner)". Selecting the site through New Reservation works also.

### **Printing labels in Last Name order**

#### **Q. How can I print mailing labels in order by name instead of Zip code?**

A: You simply need to sort the list before printing the labels. Many "lists" in Campground Master are sortable by any column. In the Print Labels dialog, click on the Last Name column heading (e.g. click on "Last Name"). This will sort it, or if it's already sorted, will change the direction of sorting.

Now when you print the labels, they will be in the same order as shown in the list.

### **Getting a history report for a site**

#### **Q. Is it possible to get a history report for a specific campsite?**

A. On the Rack, right-click on the site (in the left-hand column) and select "Find all reservations for this site". This will show all reservations ever made for the site.

### **How to keep from entering Customer Transactions**

**Q: Sometimes a clerk enters a payment or deposit through Customer Details instead of through the Reservation. I know we aren't supposed to do that, but is there any way to keep them from doing it by mistake?**

A: You can set the Access Level so that only Administrators or Managers are allowed to enter Customer transactions.

Go to Maintenance / Park Setup / Access Levels. Look for the entry "Enter Customer (non-reservation) transactions", and double-click on it. Then change the New Minimum Access Level as desired.

### **How to find a reservation by phone number**

#### **Q: How can I find a reservation by phone number?**

A: The phone number is part of the Customer information, not the Reservation information (refer to the documentation for a description of relational database organization) -- so you can't directly use Find Reservation for this. Instead, go to Customers / Find Customer. This function allows you to search by phone number as well as several other fields (selected in the "Filter by" drop-down list). Once you find the customer, then you can get to the reservation (in Customer Details, click Reservation History).

Tip: when searching by phone numbers, only enter the digits without punctuation. When searching it ignores non-digits, so for instance "3015551212" will find a phone number even if it's entered on the customer details as "Home: (301) 555-1212". However this special case of a digits-only search is only for phone numbers.

### Changing the access level for printing tab views

**Q: I want clerks to be able to print the tab views, but I can't find an Access Level setting for this. Can I change the levels for printing?**

A: (Assuming version 4.0 or later...) Go to Maintenance / Advanced Customizations / Tab Views. Edit each tab view and change the "Access level required to print" as needed.

### Tips & Techniques

#### **Making use of sites when the annual leaser is away**

When an annual leaser or seasonal camper is not present on his site, you may want to maximize income by using that site for transient customers. Of course Campground Master would normally not allow double booking, so you need to be able to temporarily remove the long-term reservation from the site or otherwise get around this restriction.

There are a few ways to handle this....

You could use "Guest" reservations for the transient renters, since Guests can be on top of a normal reservation. (On the Rack, you can right-click and use "Add a guest reservation".) This is more of a quick-and-dirty method, which is OK if it's a rare occurrence. You can't see guest reservations on the Rack, but they do appear on the other reports and tab views. You might also need to adjust your Rate definitions to handle Guest reservation types, and of course being a different reservation type could affect other functions and filtering.

You could also "split" the seasonal reservation and adjust the first night of the new part for when they're returning, essentially creating a gap in the original reservation that can be used for transients. This is a fairly clean method (it results in 2 linked reservations), but it can cause problems with rate auto-calculations since the reservation is no longer continuous.

Usually a best way is to use the "Owner" reservation type for the annual reservations. This type of reservation is designed for site owners or annual leasers that may not be present the whole time -- the Owner reservation doesn't actually "occupy" the site, e.g. it's still considered "available" for normal reservations, but allows tracking of the rent and other fees for them.

When using an Owner reservation, you should also make a "Normal" (or perhaps "Free Stay") reservation for the same person for the time that they are actually there. While this does mean more work to track when the leaser is on-site (which is actually useful sometimes), it also allows the site to be used normally for transients when the site isn't actually occupied by the leaser.

For more details about owners, see the previous newsletter article here:  
<http://campgroundmaster.com/news/ownerscantbecheckedin.html>

#### **Credit card "swiped" vs "non-swiped" fees**

Most credit card merchant accounts have lower transaction fees (or "discount" percentage) when a credit card is present as opposed to not-present (payment by phone or online). The way they know whether it's present or not is by extra "swipe" data that's read from the card when you physically swipe the card through the credit card terminal or computer-based swipe device.

This difference in fees applies whether you process cards through Campground Master or through a separate terminal. Here are a couple tips for minimizing the fees when processing them through Campground Master, but they can also be useful on separate terminals.

First of all, if you don't need to actually charge the card when they call to make the reservation but you want a card on file in case they cancel, then be sure to use the "Guarantee" function so you can enter the card information in the appropriate fields. This is better than just using the Notes part of the reservation or guarantee info, for security and for ease of charging the card later.

Now the important part to remember is that whether or not you charged a deposit by phone, even if they want you to put it on the same card, don't just use the card information you manually entered because it doesn't have the swipe data. When they arrive, ask to swipe their card when paying for any balance or new charges (click "Re-enter / Re-swipe" on the Enter Payment screen to clear out the non-swiped information). This way it will count as a "card present" sale and you will avoid the higher "card not present" fees.

Once the card is swiped, Campground Master will retain that swipe data for any further credit card payments on the same reservation in case they incur additional charges during their stay -- but for future reservations it will pull the non-swiped information from the "Guarantee Info" on the Customer Details and/or Reservation Details. So you should still swipe their card each time they arrive.

### Automatic logout after 10 minutes

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**Update:** As of version 6, there is a built-in automatic logout time for each Operator (see Maintenance / Park Setup / Operators, edit each operator).

We're often asked about adding a feature that will automatically log out the last operator if the computer is inactive for a period of time. In version 4.0 and later, this can be done by adding a simple Event Action. This example will log out after 10 minutes, but you can change the time by altering the number of seconds in the function.

1. To add this feature, go to Maintenance / Advanced Customizations / Event Actions.
2. Click Add Event Action.
3. Enter an Action Name, like "Logout after 10 minutes".
4. For the Event Trigger, select "Each Minute".
5. For the Condition, enter the following (all in one line -- if this shows it as multiple lines, enter it continuously without pressing Enter).

```
CurrentOpLevel() > 0 AND !IsAnyDialogOpen() AND (SecondsInDate() -  
SecondsInDate(TimeOfLastInput())) > 600
```

Note: Spacing is critical, it must be typed EXACTLY as shown, for instance with spaces on each side of the AND's and the operators (- and >), but no spaces anywhere else.

What this does is make sure someone is already logged in, no dialogs are currently open, and it has been 600 seconds or more since the last time any mouse movement or key pressed.

6. For the Action expression, enter:

`Logout ( )`

7. Click Save, then Close to exit Event Actions Setup.

Note that since this event is only checked each minute, the actual inactivity delay may be anywhere from 10 to 11 minutes. You could make it trigger each second, but that would result in more overhead than necessary for something that doesn't need to be so precise.

### Adding check-date fields to dialogs

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When adding fields to Dialogs through Advanced Customizations, much of the expression work is done for you using the "Quick-Add Fields" function. However you'll notice that when adding date fields, this shortcut function only adds it as a simple date control and not a "check-date" control (as seen for fields like Blocked-To and "Paid Thru". If you want a date field that can be "blank" instead of always having a date in it, you need to use a date control with a checkbox.

This example shows how to convert a simple date control to a check-date control.

The example below assumes you have a field called "Cust\_User\_Date" that you're adding to the dialog, and the field name is "Date" so that the resulting date selection control is called "Date Input" (you'll need to change these in your expressions as needed for your names, of course).

After using Quick-Add to add your date field, edit the "Date selection" element that's automatically added and follow these steps to make it a check-date field:

1. Change the Control Type to "Date selection with a checkbox".
2. Change the Initialize expression so that it sets the checkbox according to whether the field is blank or not. For instance:

```
IIFQ(FieldIsBlank(ThisCust(),"Cust_User_Date"), 'DlgSetUserCtrlDateCheck("Date Input", .F.)', 'DlgSetUserCtrlDate("Date Input", FieldDate(ThisCust(),"Cust_User_Date"))')
```

3. Change the OK/Save expression to set the field to blank if the box is not checked:

```
IIFQ(DlgGetUserCtrlDateCheck("Date Input")=.F., 'SetFieldBlank(ThisCust(),"Cust_User_Date")', 'SetFieldDate(ThisCust(), "Cust_User_Date", DlgGetUserCtrlDate("Date Input"))')
```

That's all there is to it, so Save the changes to the element. Now it will act like other check-date controls and allow the field to be blank (no date set) when the checkbox is not checked.

## Adding custom pick-lists to dialogs

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When adding custom data fields, you may want to add a data field and dialog selection list that only has certain choices that the operator can choose from, the way Campground Master uses Pick Lists.

While it isn't possible to define a new Pick List, it is possible to use the "Drop-down list box" control type to limit the choices just like a pick list.

First of all, when adding the data field, be sure to make it a "Text : General" field type.

When creating the Dialog definition you can use Quick Add Fields to add the new field to a dialog, which will add the input control as an "Edit text" control. Next you'll need to modify the control type to "Drop-down list box", and change the expressions appropriately.

The examples below show how the Initialize and OK/Save expressions should look -- of course you need to change "My List Input" to the proper control name, and use your real data field name in place of "<field name>".

The Initialize expression should look like:

```
Eval(DlgClearUserDropList("My List Input"), DlgAddUserDropListText("My List Input","Item 1"), DlgAddUserDropListText("My List Input","Item 2"), DlgSetUserDropListSelectedText("My List Input", FieldText(This(),"<field name>")))
```

Of course you should replace "Item 1", etc. with the text you want to show, and you can add as many "Items" as you need by inserting more DlgAddUserDropListText functions (make sure DlgSetUserDropListSelectedText is still the last function, though).

The OK/Save expression should look like:

```
SetFieldText(This(),"<field name>", DlgGetUserDropListSelectedText("My List Input"))
```

Now the field will behave just like other pick-list based fields. The main difference is that changing the selections in the list by altering the expression above won't affect any previously entered data -- the old text will remain in the previous fields (resulting in the field appearing blank when viewed in the dialog again) -- so make sure the text selections are what you will always want to use, and avoid changing selections previously used (but they can be rearranged or added to later if needed).

Note: You'll need version 4.1 or later for the DlgClearUserDropList function -- without this, the list can keep duplicating itself if using Next/Prev buttons in dialogs like Customer Details or Site Details.

## Removing information from receipts

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We've had various questions about removing certain data from the standard receipt formats, or modifying some static text. This example shows how to make an alternate form that excludes the first night and last night information (this could be used for owners or seasonal renters that don't actually check in and out). A similar procedure can be used for removing most other information from receipts or forms or changing static (fixed) text.

What you need to do is import the sample "custom" version of the form you want to modify. You need the custom version, because the default ones in Forms Setup are simple add-ons to the canned formats so nothing can be removed from those. Then you'll need to modify the form, removing the Elements for the data you want to take off of the receipt.

The process is generally the same for most forms, though the exact location of the elements we need to remove may be different, as well as the name of the sample file you need to import. This specific example will be for the "Full-page invoice" form.

1. Go to Maintenance / Advanced Customizations / Forms
2. Click the "Import form(s)" button.
3. The Import forms file dialog will open, and you need to navigate to the folder C:\Program Files (x86)\Campground Master\Samples. In most cases it will already be in C:\Program Files (x86)\Campground Master and you will just need to double-click the Samples folder to open it. If you don't see the Samples folder, you probably need to use the "Look In" drop-down list to navigate to the proper folder.
4. Locate the file "Sample Forms - Custom version of Full-page Invoice" (which may also have ".csv" at the end of it), click on it and then click Open. Again, if modifying a different form, look for the appropriate "Sample Forms - Custom version of...." file for that form.
5. Now at the bottom of the list you'll see "Custom Full-page Invoice" (or other custom forms as per the file imported). Double-click on it to edit that form (or click on it and click "Edit Form definition").

At this point it doesn't look like much -- there's only one Element in the list. But that's a "Region" element, which is actually a bunch of nested elements (this particular region just defines some outer borders for the rest of the form, so it's like a form within a form). There are a couple ways you could proceed from here. You could click "Expand Regions" so that all nested regions are broken out in a tree-like format, and then just find what you want. But that could be too confusing, so in this example we'll take it one step (level) at a time.

6. Double-click on the Region element to edit that element. Now a dialog will open showing the particulars of that region, including another list of elements (which are also mostly regions that further sub-divide the form into manageable and movable sections).
7. The dates we're looking for are in the upper right-hand area of the form (it's handy to have a printed version of the receipt to make it easier to follow along). So double-click on the region that has the Notes "Receipt #, Site/Resv info, Balance".
8. This of course opens up another list of elements... double-click on the Region with the Notes "Reservation & Site info" to edit that region.
9. Now we're down to mostly Text and Data Expression elements, though the parts we're interested happen to be more Regions. In this case the regions are just used to help format or position the information, so we don't need to drill down into those. We just want to remove all of the information related to First Night, Last Night, Check In and Check out -- so select all 8 of the elements that mention those in the Notes, and click "Delete Elements", then confirm the deletion.
10. That's basically it -- you'll need to click "Save" 3 times to un-stack the Edit Element dialogs for each Region that we drilled into, taking you back to the Edit Form Definition dialog.

11. You can change the Form name if you prefer to make it more appropriate (e.g. "Full page invoice, no dates"), then Save it.

12. If you want this new form to appear higher in the list when printing receipts, then you can select this form in the Forms Setup dialog and use "Move Up" to move it where you want it to appear in the list.

That's it for defining the new form. If you wanted to make this the new default for printing receipts, you could do so in Maintenance / Printing Options / Reservations (or / Receipts or / P.O.S., depending on the form edited).

Of course if you use several receipt formats then you would need to do this for each one you use. You could also delete or disable the original forms if you don't need any with the dates on them.

### Color coding special reservation types

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**Update:** As of version 8, there is a much simpler way to do this for most cases -- see the new article here:  
<https://campgroundmaster.com/help/color-codingreservationtypes.html>

Original article:

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 added in version 4.0, 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 you want to check for (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). Of course you do need to be careful with your conditions so that it doesn't end up using one of your new colors when it shouldn't.

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). The Base type for Weekly is assumed to be "Normal". Obviously this example can be altered for any reservation type by simply changing the text and/or numeric values in the rule expressions below.

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. Make sure the Default scheme is "Reservations" (this is what it uses after checking all of your rules).
4. Click "Add Color Rule", and give it a name. This is what will show in the Color Key for this color. Lets make this one "Reservation, Pending, Weekly, Paid" so it follows the format of the default color key labels.



5. Define the text and background colors using the "Change Text Color" and "Change Background Color" buttons.

6. Now you need to define the rule using an Expression, which must have a boolean result for the reservation we're checking. If it's True, then this color will be used. If it's False, then it will continue and check the next rule, and so forth.

This also means that the order of the rules may also be important in some cases (e.g. the highest priority conditions should be above the lower priority conditions in the rules list), but in this case it's not a factor since each case is very specific. Speed can also be affected by the order, e.g. the sooner it finds a match the quicker it finishes, but again it shouldn't matter for this simple case especially if Weekly is rare compared to Normal or other reservation types.

Now you could do all of the appropriate tests against the reservation to see if it's pending and see if it's paid in full as of the given date, etc. -- but there's a shortcut you can use. The function `ColorStatusResv()` will do the normal checks and return a code for which standard color key item it would normally use. All you need to do is see if this would be the color for a "Normal" type pending/paid reservation and then see if it's actually a Weekly reservation instead of Normal. By checking the Fixed List Values for "Site Status (color default)" you can find that the code for the "Resv, Pending, Paid" status is 35.

Note: If your reservation type has a different Base Type, e.g. Monthly instead of Normal, then of course this value would need to be changed accordingly.

So the expression for this condition would be:

```
ColorStatusResv(Resv(), ThisDate(), ThisPeriod()) = 35 AND Resv:Resv_Type =  
"Weekly"
```

7. Save that rule.

8. Now we need to continue adding other rules to cover any other conditions like the normal color key does (if you skip some, then the reservation might not match any of your rules and thus be shown in the default "Normal" color).

You can save some time by selecting the last rule added above and "Copy Rule(s)", then edit the copied rule. Just change the name, colors, and the expression. Each expression should be the same as shown above except for the numeric code returned by `ColorStatusResv()`. The rest of the colors needed for a "Normal" based reservation type are shown below:

- Reservation, Pending (not paid) : 28
- Reservation, Pending, Don't Move : 30
- Reservation, Pending, Don't Move, Paid : 37
- Reservation, Confirmed : 25
- Reservation, Confirmed, Don't Move : 51
- Reservation, Guaranteed : 24
- Reservation, Guaranteed, Don't Move : 50
- Reservation, Checked In, Not Paid : 13
- Reservation, Checked In, Paid : 14

Note that these numbers are only correct for Reservation Types with a "Normal" base type, and we don't test for Checked Out, Canceled, etc. since those colors are the same for all reservation types anyway.

If your new Reservation Type has a base type of Monthly, then these are the values you should use (note that "Don't Move" is not a different color for Monthlies):

- Reservation, Monthly, Pending (not paid) : 33
- Reservation, Monthly, Pending, Paid : 40
- Reservation, Monthly, Confirmed : 41

Reservation, Monthly, Guaranteed : 42  
Reservation, Monthly, Checked In, Not Paid : 22  
Reservation, Monthly, Checked In, Paid : 23

There are some other special situations like Owner reservations (which don't have status so there's only paid/not paid status conditions to test), so be sure to check the "Site Status" fixed list values for all conditions you may need to test for the appropriate Base Type of your new reservation type. To get the Site Status values -- from Edit Color Scheme Rule click on Insert Expression Element..., select the element type "Fixed List Values", then the fixed list name "Site Status (color default)". Select the status needed in the right-hand column, and the numeric value for that status will be shown at the bottom.

9. Now once the scheme has all the rules 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.

### Adding special reservation validations

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

This Advanced Customizations example is the most complex we've had so far, but the more adventurous of you may find it useful.

The goal here is to do some special validations when making a reservation, warn the operator if the validations fail, and give them the option to either continue or not. Since we need to do it \*before\* the reservation is completed, it must be done as a Dialog customization to the New Reservation dialog. We can accomplish what we need by adding elements of type "Action on data saved", and selecting the options in the elements to do the action before the normal processing and allow aborting the action.

Now there are some assumptions made here to simplify things -- we're assuming no linked reservations need to be checked, no complications with splitting reservations, etc... so this example isn't foolproof, but should cover most situations.

The three things we're going to validate are listed below. One is a common request to not allow continuing without "How found" filled in, and the other two are typical restrictions with some membership parks:

1. "How found" must be filled in.
2. At least a 7-day gap between reservations for the same customer.
3. No more than 3 "active" current or future reservations in place at any time.

Since this example involves a lot of data entry, it's not going to be a click-by-click tutorial. If you're with us this far, then hopefully you just need the expression details to fill in the blanks. Remember that when entering expressions, never use the Enter key -- while the text below may show multiple lines for an expression, that's just a limitation of this formatting -- keep entering the expression text as a single line (if using copy/paste, you may need to delete the extra line breaks manually).

Also note that while the first restriction is easy to test with a single expression, the other two involve a lengthy process of checking all other reservations for that customer. This is best done using a separate Script so the expression in the Elements are simplified. We've included the complete scripts below as well.

So, first we need to add a Dialog definition, with the following details:

Dialog name: New Reservation restrictions

Add-on (checked): New Reservation

Enabled (checked)

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition for New Reservation then you would just add elements on to the existing one instead of creating a new one here.

Now we'll add the validations as 3 separate elements:

### Element 1: (How found filled in)

Element Type: Action on data saved

Action expression:

```
IIFQ( Empty(DlgGetDropListSelectedText(1084)), 'Eval(MessageBox("How-found must be filled in",0,2), DlgSetFocusCtrl(1084), .F.)', '.T.')
```

Execute the Action before... (checked)

Abort the operation which triggered... (checked)

### Element 2: (Validate for 7-day gaps between reservations)

Element Type: Action on data saved

Action expression:

```
Eval(SetVar("pCust",ThisCust()), SetVar("dFrom",DlgGetCtrlDate(1052)),  
SetVar("dTo",DlgGetCtrlDate(1068)), iifq(B(CallScript("ResvGapUnder7")), '.T.',  
'MessageBox("This would result in less than 7 days gap between reservations for this  
customer.\n\nAre you sure you want to proceed?", 2, 1) = 2'))
```

Execute the Action before... (checked)

Abort the operation which triggered... (checked)

### Element 3: (Validate for a max of 3 current/future reservations)

Element Type: Action on data saved

Action expression:

```
Eval(SetVar("pCust",ThisCust()), iifq(DlgGetCtrlDate(1068) < Today() OR  
B(CallScript("ResvMax3Future")), '.T.', 'MessageBox("This would result in more  
than 3 current or future reservations for this customer.\n\nAre you sure you  
want to proceed?", 2, 1) = 2'))
```

Execute the Action before... (checked)

Abort the operation which triggered... (checked)

**IMPORTANT:** If you're using version 4.1 or earlier, then the last two Action expressions above must be modified -- instead of "\n", you need to use "n" (just one backslash instead of two, as explained in a previous article).

OK, that does it for the dialog definition, but before it will work, we need to add the following Scripts.

### Script 1:

Script name: ResvGapUnder7

Description: Returns False if there's another reservation for this customer with less than a 7 day gap between them

Expressions: (The line numbers are not to be entered of course)

```

1. ; Input:
2. ;   dFrom and dTo vars should be the dates of the new reservation
3. ;   pCust should be the customer this reservation is for
4. SetVar("fOK", .T.)
5. SetVar("nMinGap", 7)
6. SetVar("nList", CustNumResv(pCust))
7. SetVar("n", 1)
8. WHILE n <= nList
9.   SetVar("pResv", CustResvAt(pCust, n) )
10.  IF (dFrom > FieldDate(pResv,"Resv_Last_Date") AND Days(dFrom,
FieldDate(pResv,"Resv_Last_Date")) < (nMinGap+1)) OR (dTo <
FieldDate(pResv,"Resv_First_Date") AND Days(FieldDate(pResv,"Resv_First_Date"), dTo) <
(nMinGap+1)) OR (dTo >= FieldDate(pResv,"Resv_First_Date") AND dTo <=
FieldDate(pResv,"Resv_Last_Date")) OR (dFrom >= FieldDate(pResv,"Resv_First_Date") AND
dFrom <= FieldDate(pResv,"Resv_Last_Date")) OR (dFrom <=
FieldDate(pResv,"Resv_First_Date") AND dTo >= FieldDate(pResv,"Resv_Last_Date"))
11.    IF ResvIsActive(pResv, .T. , .F. , .T., .T.) AND
(FieldValue(ThisResv(),"Field_Index") != FieldValue(pResv,"Field_Index"))
12.      SetVar("fOK", .F.)
13.    ENDIF
14.  ENDIF
15.  SetVar("n", n+1)
16. ENDWHILE
17. ; Returns False if there's another reservation for this customer with less than a 7
day gap between them
18. fOK

```

### Script 2:

Script name: ResvMax3Future

Description: Returns False if this would make more than 3 future reservations

Expressions:

```

1. ; Input:
2. ;   pCust should be the customer this reservation is for
3. SetVar("nFuture", 0)
4. SetVar("nList", CustNumResv(pCust))
5. SetVar("n", 1)
6. WHILE n <= nList
7.   SetVar("pResv", CustResvAt(pCust, n) )
8.   IF FieldDate(pResv,"Resv_Last_Date") >= Today()
9.     IF ResvIsActive(pResv, .T. , .F. , .T., .T.) AND
(FieldValue(ThisResv(),"Field_Index") != FieldValue(pResv,"Field_Index"))
10.      SetVar("nFuture", nFuture+1)
11.    ENDIF
12.  ENDIF
13.  SetVar("n", n+1)
14. ENDWHILE

```

15. nFuture < 3

That completes the necessary programming. With everything entered properly, it will perform the validations we needed. You'll notice that the two scripts are similar and basically perform a loop through all reservations of the given customer to check the necessary conditions. These examples could be modified to do other types of customer-based validation, such as looking for previous reservation balances, notes in previous reservations, types if sites they stayed in before, etc. You could also just do customer validation (e.g. without the loop), such as proper fields filled in, make sure the rig type is appropriate for the site selected, and so forth.

## Newsletter #29 (Feb 4, 2008)

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### Contents

#### **Q & A**

- Cashing a customer's check
- Recording a customer's credit card information
- Entering credit card security codes
- Moving the database to "Public Documents"
- Changing the First Night after check-in
- Adding options like 50A to New Reservations
- Deleting old Operators

#### **Tips & Techniques**

- Making a new reservation that moves during the stay
- Automatic logout after 10 minutes (revisited)
- Coloring the Rack dates for holidays

### Q & A

#### **Cashing a customer's check**

**Q: When a customer comes in to buy quarters to use for laundry and they pay for the quarters with a check, how do we put the check in the computer so the Receipts by Payment Method comes out right to balance the cash drawer?**

A: Go into Unbound Transactions (from the Transaction menu), enter a Payment with Check as the payment method, and then enter a Refund with Cash as the payment method.

Note that this method could also be used for exchanging currency, e.g. if you had separate Payment methods for Cash/US and Cash/Canadian. You could even do it within a person's reservation along with their other transactions.

#### **Recording a customer's credit card**

**Q: Where can I put customers' credit card information for future reference? I want it to be secure, not just in the notes.**

A: You can put the credit card in the "Guarantee Info". It will prompt for credit card information when you Guarantee a reservation. Another way to enter it is to click the "..." button at the right side of the Guarantee info line on either Reservation Details or Customer Details. As long as you're entering the information in the specifically designated fields for credit card number, expiration date, etc, then the information is stored securely (encrypted) in the database. Also in version 4.2 and later, the number will be hidden on the screen from operators that don't have Administrator access.

### Entering credit card security codes

**Q: On the Credit Card input screen, can a field be added for the CVV Code? It is required by our processing company.**

A: The CVV credit card field can be enabled in Maintenance / Credit Card Processing Setup. Even if you're not using the processing features, you can enable that input field.

### Moving the database to public documents

**Q: After I upgraded to Windows Vista, Campground Master shows this message when I start up: "The data base you're opening seems to be in a location that some users of this computer may not be able to access, and you may have trouble writing to it your self. Would you like to copy to public documents ?" It doesn't sound safe, so should I do this?**

A: Yes, you should tell it to move the database to Public Documents. This is just the name of a folder on your computer, and it's only public in the sense that other users that log in to your computer can access it (unless of course you've specifically set it to be a shared folder on your network). It doesn't mean that the data is accessible to the world. Under Vista's new ultra-strict protections, the database must be located in Public Documents or else Campground Master won't be able to write changes to it.

Note: If it doesn't ask this when you start up, then you can also go to Maintenance / Database Maintenance and select the option to "Move the database..."

### Changing the First Night after check-in

**Q: I accidentally checked in someone with the wrong First Night, and now it won't let me change it. How do I fix it?**

A: It disables the First Night for checked-in reservations to help guard against accidental changes. To change it, you just need to undo the check-in by clicking on the "Pending" box in the upper right Status area. Then after fixing the date, click on "Checked in" to check them back in. Be sure to answer the prompts carefully if it asks which date you want them checked in.

### Adding options like 50A to New Reservation

**Q: In the demo database there's a checkbox for "50A" on the New Reservation window. How can I add that to mine, as well as other options?**

A: Up to 5 checkboxes like this can be added to New Reservation dialog, which are associated with the Preferences as well as the Site Attributes. For instance, the 50A checkbox in the demo not only tells it to allow only sites that have 50A (according to the Attributes defined in Sites Setup), it also flags the 50A Preference in the Reservation as a "Must Have". This allows auto-rates to calculate any additional cost for that option, according to your Rates setup.

To add those checkbox options, go to Maintenance / Program Options / Reservations. You'll see 5 drop-down lists for Quick-select preferences. You can select the desired Reservation preference field in each of the 5 lists, and they will be shown as options on New Reservation.

Note that you can only select fields here that are yes/no or must-have/must-not-have preference fields, which are also known as "Attribute" or "Attrib\_" fields. These are configured in Data Field Definitions, so if you don't see one you want to use then you can enable it through Maintenance / Data Field Definitions / Reservation Fields. You can also rename attribute fields -- for instance if you need one for "trash service", then you could rename one that you don't use, like "20A". Also note that you may want to enable or create matching fields under the Site Fields (being careful to use the field with a matching "Attrib\_" Field ID). This will allow you to specify which sites have the option available.

## Deleting old Operators

**Q: What would happen if I deleted operators that are no longer working here? Would this affect the past transactions that were completed by them?**

A: It is perfectly safe to delete operators (as long as you don't delete the wrong ones, of course). Unlike most other situations in Campground Master, transaction records aren't linked to the operator -- it only saves the operator's code as text. This was specifically done knowing that operators come and go, so the operator tag on a transaction can't change or get deleted if operators are changed or deleted.

## Tips & Techniques

### Making a new reservation that moves during the stay

If your park is close to full, you may run into situations where someone wants to stay longer than you have a single site available for, however you could accommodate them if they moved to another site during their stay.

Since you need to do this when creating the reservation, using the normal split/move method after creating it won't work because no site is available for the whole duration. What you need to do is create it as linked "sub-member" reservations to begin with.

Lets say they need site 1 for 9/25 to 9/27, then site 3 for 9/28 to 9/30.

1. In New Reservation, first just select the 9/25 to 9/27 dates, then select site 1 as you normally would (e.g. quick-pick or double-click on the site in the grid).
2. Next, check the box "Sub-member of" below the grid. That means the next selection will be a sub-member of the first one.
3. Now change the First and Last nights for the 2nd part -- 9/28 to 9/30, and select site 3 as a new site. Note that since "Sub-member of" was checked, changing the dates does not affect the first part of the reservation. Now you should see both sites selected (on the grid and in the "Selected Sites" list), on the corresponding dates.

You can continue this process for as many parts as you need to -- just be sure to re-check "Sub-member of" each time before changing the dates for the new portion, or else it will be modifying the dates of last, or selected, site.

Once you have all of the parts added, just finish the reservation like you normally would.

### Automatic logout after 10 minutes, revisited

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

We're often asked about adding a feature that will automatically log out the last operator if the computer is inactive for a period of time. In version 4.0 and later, this can be done by adding a simple Event Action. This example will log out after 10 minutes, but you can change the time by altering the number of seconds in the function.

(This was covered in the last newsletter, but a number of our users asked if they could also have it re-open the log-in dialog automatically. So this example adds that feature.)

1. To add this feature, go to Maintenance / Advanced Customizations / Event Actions.
2. Click Add Event Action.
3. Enter an Action Name, like "Log out after 10 minutes".
4. For the Event Trigger, select "Each Minute".
5. For the Condition, enter the following (all in one line -- if this shows it as multiple lines, enter it continuously without pressing Enter).

```
CurrentOpLevel() > 0 AND !IsAnyDialogOpen() AND (SecondsInDate() -  
SecondsInDate(TimeOfLastInput())) > 600
```

Note: Spacing is critical, it must be typed EXACTLY as shown, for instance with spaces on each side of the AND's and the operators (- and >), but no spaces anywhere else.

What this does is make sure someone is already logged in, no dialogs are currently open, and it has been 600 seconds or more since the last time any mouse movement or key pressed.

6. For the Action expression, enter:

```
Eval(Logout(),MenuCommand(32830))
```

The Eval() function is used because we want to execute a series of expressions (functions in this case), rather than just one. The Logout() function simply logs out the current user, and the MenuCommand() function executes a command from the menus as if the user clicked on it -- in this case, the "Log In/Out" command.

Note that MenuCommand() requires a numeric command value. To find the value for a particular command, you can go into "Insert Expression Element" from any expression editing window, select Fixed List Values, and then select Menu Command Values. When you select a menu command from the right-most list, the numeric value will be shown in a box below the lists.

7. Click Save, then Close to exit Event Actions Setup.

Note that since this event is only checked each minute, the actual inactivity delay may be anywhere from 10 to 11 minutes. You could make it trigger each second, but that would result in more overhead than necessary for something that doesn't need to be so precise.

## Coloring the Rack dates for holidays

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<https://campgroundmaster.com/help/overview32.html>



With version 4.0 or later, you can create a custom color scheme to change the colors of the date headers on the Rack. This can be used to highlight holidays or other special events. You can also create a scheme to color those dates for empty sites, similar to the way weekends are normally shaded in a darker color.

There is a sample color scheme that already does this, which you can import from the Color Schemes Setup. See the Color Scheme documentation for details on importing. This can save a lot of work, but you still need to edit the dates used in the conditions and set the colors the way you want. You may also need to add additional rules for more dates -- see step 8 below. Note that you would also need to use Select Global Color Schemes as shown in step 9 below to enable the imported scheme(s) to be used on the Rack.

If you prefer to create a new scheme **from scratch** instead of importing the sample, follow these steps:

1. Go to Maintenance / Advanced Customizations / Color Schemes.
2. Click "Add scheme definition", and give it a name like "Rack dates, holidays". Note that only one Color Scheme can be used to override the rack date headings, so if you have multiple holidays or other reasons to change the date colors, etc. then the rules for all of them need to be defined in this one scheme.
3. Make sure the Default scheme is "None".
4. Click "Add Color Rule", and give it a name. This is what will show in the Color Key for this color. Lets make this one "July 4th weekend".
5. Define the text and background colors you want using the "Change Text Color" and "Change Background Color" buttons.
6. Define the rule condition using an Expression, which must have a boolean result. If it's True, then this color will be used. If it's False, then it will continue on and check the next rule, and so forth. If no rules are satisfied, then the default color is used (so we don't have to create a rule for that).

The context function `ThisDate()` is used for the date of interest (each column's date). We just need to compare it to the special dates we want this color, using the syntax or boolean expressions. In particular, when comparing multiple dates we need to use "OR" operators so it's true if any one of the dates matches. So if the dates to color are July 4th thru the 6th of 2008, the expression for this condition would be:

```
ThisDate() = {7/4/08} OR ThisDate() = {7/5/08} OR ThisDate() = {7/5/08}
```

Note that it's curly braces around the dates, not parenthesis -- that's the format used to enter date values. Also, make sure the spaces are only added where shown -- e.g. there should **not** be a space between "ThisDate" and "()", but there **must** be spaces around the "=" and the "OR" operators.

If you need to specify a broader date range like July 1st thru the 31st, you would use the '>=' and '<=' operators to specify a range, like:

```
ThisDate() >= {7/1/08} AND ThisDate() <= {7/31/08}
```

7. Save that rule.

8. Now we need to continue adding other rules to cover any other dates we want to change colors for. The easiest way is to select one of the existing rules, click "Copy selected Rule(s)", and then Edit the new copy -- just changing the name of the rule, the colors, and the dates. Any number of dates can be checked in a single rule, just keep repeating the sequence as needed.

9. Once the scheme has all the rules and you Save it, there's one more thing you need to do -- make this scheme the default for date headings. Go to Maintenance / Advanced Customizations / Select Global Color

Schemes, and select the scheme you just created in the drop-down list after "Override Dates headings with color scheme:".

Now your new colors should be used on date headings of the Rack.

### Coloring the Empty Sites

If you want to also color all of the empty sites on those dates, you need to create another scheme, and select it for the default for open sites. Again you can import the Sample scheme to have a template for this, and all you need to do is edit the dates and select it (see step 9).

If you prefer to create a new scheme **from scratch** instead of importing the sample, follow these steps:

1. Go to Maintenance / Advanced Customizations / Color Schemes.
2. Click "Add scheme definition", and give it a name like "Rack open sites, holidays". (As before, you need to use a single scheme for all open-site rules.)
3. Make sure the Default scheme is "Open Sites (Rack)".
4. Click "Add Color Rule", and give it a name. Lets make this one "July 4th weekend" to match the previous one.
5. Define the text and background colors you want using the "Change Text Color" and "Change Background Color" buttons.
6. The Color Rule Condition Expression will be slightly different for this scheme, because we only want to use this color if the site is available (not marked as unavailable). We can use the `ColorStatusSite()` function to get the status, and make sure it's not unavailable in addition to checking the dates:  
  

```
ColorStatusSite(ThisSite(), ThisDate(), ThisPeriod()) != 9  
AND (ThisDate() = {7/4/08} OR ThisDate() = {7/5/08} OR ThisDate() = {7/5/08})
```
- The expression is broken into 2 or more lines for readability here, but it must be continuous (no line breaks) when you enter it.
- Note that you have to use AND between that function and the dates checking, which also means there must be parenthesis around the rest of the condition to make sure the OR operators are treated properly.
7. Save that rule.
8. Now we need to continue adding other rules to cover any other dates we want to change colors for, so repeat steps 4 through 7 as needed.
9. Once the scheme has all the rules and you Save it, there's one more thing you need to do -- make this scheme the default for open sites. Go to Maintenance / Advanced Customizations / Select Global Color Schemes, and select the scheme you just created in the drop-down list after "Override empty sites with color scheme:".

Now your new colors should be used on empty sites of the Rack.

## Newsletter #30 (Mar 24, 2008)

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### Contents

#### **What's New**

- How good is your backup process?
- Receipt printer and Cash Drawer setup

#### **Q & A**

- Changing customer field names
- Using the demo to train people
- Some taxes missing on Discounts
- Viewing checked-out reservations on the Rack
- Adding first names to transaction reports
- Misc. Income not on Shift Reports
- Receipt transactions overwriting bottom text

#### **Tips & Techniques**

- Showing Reservation Details before check-in
- Opening an old backup for review
- Forcing How-heard to be filled in
- Adding a logo to your receipts

### What's New

#### **How good is your backup process?**

This isn't necessarily a "new" thing, but it may be new to you. We sometimes hear about computer failures causing a complete loss of a campground's data, and the worst part is that they don't always have usable backups to recover from. We hate to hear these stories, but we know it's also too easy to get lazy about backups. In some cases there are some misunderstandings that can cause problems too. So here are some questions:

**How valuable is your data?** If you lost it, would you know who owes you money? Would you know who has a reservation and for how long? Do you ever need to contact one of your past or future customers? Do you need your records for tax purposes? How long would it take you to set up your database again from scratch, and re-enter all customer information even if you do have paper records?

OK, assuming you agree that your data is valuable, lets see if you're doing adequate backups:

**Are you making backups on removable media?** If you're just backing up to My Documents, for instance, this will not do you any good if your hard drive fails or your computer is stolen. So you should be making the backup to a floppy disk, CD, USB memory stick, or other external device. When you make the backup, be sure to check the "Save In" location before clicking the final "Save" button to verify that it is actually going to the drive you want. If you don't select a specific drive in the "Save In" drop-down list, then it may just be defaulting to My Documents or some other location on your C: drive.

**Do you regularly take the backups off-site, or at least to another building?** If you make a backup and leave it near the computer, that won't help if there's a fire or other catastrophe. Likewise, having an automatic backup process on a server, such as copying to an external hard drive, is only as safe as that hard drive (thieves love external hard drives because they are easy to carry away, easy to sell, and contain all of your sensitive data).

**Are you verifying your backups?** Just because it says "backup is complete" doesn't mean that the disk or memory stick you're using is readable. After a backup, or at least once in awhile, you should verify it by using

the Restore from Backup function. Don't worry, if the backup isn't perfect then your current data will not be altered. To verify it, you should first remove the disk or other media device from your computer, because if you just leave it in the computer and use Restore, it's not really reading it from the disk -- Windows still has it in a cache so it doesn't need to read it from the disk (that's a "feature" designed to make things faster). So you need to completely remove the disk, then re-insert it, before using the Restore function. If it gets an error when restoring, try backing up to a different disk. If you can't get it to restore correctly, contact us immediately so we can get your backups working properly.

**Are you rotating multiple backup copies?** We recommend a 7-day rotation -- keep 7 disks (or even 7 USB memory sticks -- small 128MB ones are very cheap now), labeled with the day of the week. That way if some of them go bad or get damaged, you're not completely lost. This is also a good way to help you keep off site backups -- each day, take the new one home with you and then bring the oldest one back in to the office the next day to be used for the next backup.

Hopefully these tips will encourage you to use a proper backup routine, not only for Campground Master but for any data that's valuable to your business.

### Receipt Printer and Cash Drawer Setup

We've added more detailed guides to our documentation for setting up 3" receipt printers and cash drawers, and configuring Campground Master for them. You can find these guides on our web site here:

For details on setting up a receipt printer using Direct to Port (e.g. for Parallel interfaces), see the documentation on this page:

<http://campgroundmaster.com/help/receiptprinterdirecttoport.html>

For details on setting up a receipt printer using a Windows driver (e.g. for USB interfaces or when it's to be shared on the network), see the documentation on this page:

<http://campgroundmaster.com/help/receiptprinterusbdriverset.html>

Further details on connecting the cash drawer can be found here:

<http://campgroundmaster.com/help/cashdrawersetup.html>

## Q & A

### Changing customer field names

**Q: Is it possible to change (in Customer Details) the "Drivers Lic:" field to a different name?**

A: Yes, you can change this by editing the field under Maintenance / Data Field Definitions / Customer Fields. Look for the Drivers License field, and edit the field name, short label, and report heading as needed. There are several fields that can be renamed for other purposes, but there are also some limitations. For instance, the type of field can't be changed, so for instance the Rig Length field can be renamed (e.g. to Boat length), but it will always be considered a "length" type of field (so it wouldn't work well to change it to be # of slide-outs or to any non-numeric field). If you need additional fields for other purposes, refer to newsletter #27 for an example.

## Using the demo to train people

### **Q: Can I use the demo to train people without interfering with the data (or other computers)?**

A: Yes you can, as long as your real database is using a name other than "demo" and you specifically open the demo database. You also wouldn't want to do this on the Master computer (in a networked environment), since that would disable all of the other workstations. To run the demo, just use the "Campground Master demo" icon on the desktop, or if you've removed that, go to Start / Programs / Campground Master / Sample database (demo). This will open the demo database, and since the demo isn't enabled for networking then it won't affect any of the other workstations. When done training, close Campground Master and re-open it the way you normally do.

Note: If you don't find the "Sample database" option, try File / Open to see if there is a "demo" database under Shared Documents\Campground Master (or in Vista, Public Documents\Campground Master). If it's not there, then you would need to install the "free demo" version of the software from our web site -- just make sure it's the same version that you're using now (see Help / About Campground Master for the version, and download that same version from the Downloads page of our web site).

You might also want to restore a backup of your real database into the "demo" database -- so they can train with your actual setup. Just be very careful about which database is open, or else you might mistakenly change your real data, or mistakenly enter real reservations in the training database. Note that in a networked setup, assuming you do this on a computer that's normally a client, it will try to connect to the server but will fail (due to mis-matched database names). Therefore you would need to go under Maintenance / Network Functions / Work Offline. Do *not* try to change the network settings, as this would also affect the settings for your real database -- causing it to become corrupt once you re-open the real database.

## Some taxes missing on Discounts

### **Q: Not all of my taxes are being calculated properly when I do a Discount.**

A: For manually entered Discount transactions, the default taxes are based on the configuration under Maintenance / Park Setup / Taxes. Select "Default" for each tax that you want to show up. Optionally you can select which categories of charges it should be the default for -- if you do this, be sure that "Discount" is one of the selected categories for each Tax type that might be discounted.

Note: Ideally you want to select a specific category when you do a discount, rather than leaving the default "Discount" category selected. This will ensure that the appropriate taxes are subtracted along with the discount (in case discounts are applied to items taxed differently), and also will make sure the amount is taken out of the appropriate category for reporting purposes.

## Viewing checked-out reservations on the Rack

### **Q: How can I see checked-out reservations on the Rack?**

A: In Maintenance / Program Options / Reservations, there's an option "Make checked-out sites immediately available". If you don't already see checked out reservations on the Rack, this must be currently selected. Just uncheck that box to see them on the Rack again.

Note that there may have been a reason to have that option selected, though, e.g. so that if someone vacates a spot on the same day they arrive you could re-use it for another walk-in. So it's up to you whether you want to leave it unchecked.

Another option for locating past reservations would be to use the "Departures" tab view, adjusting the date as needed (and be sure the "Pending only" box is not checked).

### Adding first names to transaction reports

**Q: In the Transactions tab, when generating detail reports, is it possible to get both the first and last names displayed?**

A: Yes, just go into Detail Options (on the Transactions tab view) and check the box(es) for the fields you want. "Customer First Name(s)" is one of the options.

### Misc. Income not on Shift Report

**Q: Aren't the Misc. Income Transactions supposed to show up in the Shift Report?**

A: Misc. Income transactions are meant for things outside of "customer" business, e.g. things not handled by the clerks and/or not affecting the retail receipts. For things like this that you want to appear in the Shift report, especially if they will affect the Receipts side of it, you should use Unbound Transactions to enter them as separate Charge and Payment transactions.

### Receipt transactions overwriting the bottom text

**Q: When I print a statement for a long-term customer, sometimes the transactions overwrite part of the notice at the bottom of the page, instead of going to a second page. How can I fix that?**

A: If you don't need the statement to include their entire history, then you can have it limit the transactions printed (using the "Print Only Some Transactions" button, with the various options next to it, instead of the "Print Reservation Receipt (All)" button. If you're using a version prior to 4.0, this is the only option. However in version 4.0 and later, it can print multiple pages. The problem is that the default number of transactions per page doesn't work for all situations, e.g. if you've added more text in the notice at the bottom, or changed the "Starting position" value for the bottom text. To correct this so it goes to another page sooner, go to Maintenance / Advanced Customizations / Forms. Select the receipt format you use, and click Edit Selected Form. Reduce the "Trans. rows/page" value until it gives the results you need. (Be careful not to make any other changes in the form definition unless you fully understand how they affect it.)

## Tips & Techniques

### Showing Reservation Details before check-in

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

This example shows how to use an Event Action to automatically open the Reservation Details dialog when checking in a customer. (Version 4.0 or later required.) This may be useful if you want to review the information before doing the check-in.

1. Go to Maintenance / Advanced Customizations / Event Actions.
2. Click Add Event Action.
3. Enter an Action Name, like "Resv Details before check-in".
4. For the Event Trigger, select "Check in reservation, before".

5. For the Action expression, enter:

```
EditReservation(ThisResv())
```

That's all there is to it.

To get fancier and only do this only under certain conditions, such as not having How-Heard filled in, with a message beforehand to indicate why it's going to Details, then use this Action expression (be sure to copy it exactly -- every quote and back-slash is important):

```
iifq(Resv:Resv_HowHeard = "", 'Evalq(\'MessageBox("How-Heard has not been set! Please set it in the following Reservation Details window.")\', \'EditReservation(ThisResv())\')', '.F.')
```

There are a lot of other possibilities, and potentially you could even use this to abort the check-in if conditions still aren't met after editing the reservation details.

## Opening an old backup for review

There may be times when you want to look at an old backup database, to check something that may have changed or been purged from the current data. There are a couple of safe ways to do this without affecting your current data.

**IMPORTANT:** In older versions of Campground Master (prior to v3.6), opening any database might make it used that as the new default database -- be sure to make a note of where your normal database is located (e.g. through Maintenance / Program Options / Database) before attempting to open a different one.

The safe way to open a backup without changing your current data is to extract the old database file from the backup, rename it, and then open it.

Note: This assumes familiarity with folder navigation, file opening and file copying in Windows Explorer (or My Computer). If you are not familiar with manipulating files in Windows, then we don't recommend that you attempt this on your own.

The backup file is typically a "zip" compressed file. You should be able to "open" a backup in Windows Explorer if you have Windows XP or later, and you'll see the file "database.prk" in it (possibly with some other files like BMP map images). Don't try to open these file directly (Campground Master probably won't let you do that anyway) -- instead, you need to Extract the "database.prk" file out of the backup to somewhere like My Documents. Then, Rename the file to something like "old.prk" (because Campground Master won't open one that's called "database"). Then you can safely Open it in Campground Master, using File / Open.

Note: When you open it, you should get a message saying that it will NOT be used as the default database. This is what you want to see, so the next time you open Campground Master your normal data will be opened.

When you're finished viewing the old backup, close Campground Master. It's a good idea to clean things up by deleting the old.prk file as well as any log files or auto-backup files that it created for the old database. Now when you re-open Campground Master, it should open your normal database again.

## Forcing How-heard to be filled in

**DISCLAIMER:** This article involves *Advanced Customizations*, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

A common request is to make sure the How-Heard field is filled in when making a reservation. We've had an article before, in Newsletter #26, showing how to force a field to be filled in (in that case it was # Adults).

Changing that to check for How-Heard is a simple matter, but because the field type is a drop-down instead of a text field, slightly different expressions must be used rather than just changing the field name.

1. The first step is to add a Dialog definition that's an Add-on to the New Reservation dialog. Go to Maintenance / Advanced Customizations / Dialogs, and click "Add dialog definition".

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition then you would just add elements on to the existing one instead of creating a new one here (in which case, skip to step 3).

2. Give it a name, such as "New Reservation add-on". Then check the "Add-on" box and select "New Reservation" from the list. We're not adding any new controls to it, so the Width and Height values can remain 0.

3. Now we need to add an action to the dialog that checks the How Heard field, showing an error message and preventing the reservation from being saved if How Heard is blank. Click "Add Element", and for the element type select "Action on data saved".

4. We don't really need a Condition for this element (assuming we always want it to force the field), though you might want to add a condition so that only non-administrators are restricted, for instance. In that case you could put in the following Condition:

```
CurrentOpLevel() < 5
```

5. Now for the Action expression, which will be executed when the reservation is saved (e.g. "Done", "Continue", or any other button clicked that would normally save the reservation). We won't go into the design details, but it should be fairly self-explanatory if you look up the components in the Function Reference of the Advanced Customizations documentation. Also note that we need the Control ID of the How Heard field, which can be looked up in the Dialog Control ID reference. This can be found online here: <http://campgroundmaster.com/help/basedialogs.html>.

Enter this for the Action expression:

```
IIFQ( Empty(DlgGetDropListSelectedText(1084)),  
      'Eval(MessageBox("How-Found must be filled in",0,2), DlgSetFocusCtrl(1084), .F.)',  
      '.T.' )
```

A few notes about the expression:

- It's broken into 3 lines for readability here, but it must be continuous (no line breaks) when you enter it.
- IIFQ is used instead of IIF, because we don't want both of the result expressions to be evaluated (which would result in the error showing up no matter what).
- If the "How Heard" field is empty, it does the Eval( ) function, else it simply returns True.
- The Eval function does 3 things in sequence: Shows the error message, sets the keyboard focus to the field (for convenience), and returns False to abort the saving process.

6. We also need to check both of the boxes -- "Execute the action before..." and "Abort the operation...". Obviously we want to make sure this condition is met before actually saving the reservation, and if the How Heard is not filled in then we don't want to save the reservation yet.

7. Now just Save the element, and we're done with the customization for checking the How Heard field. Once you're all finished, just Save everything and try it out. Remember that if you entered the condition shown in step 4, it will still allow How Heard to be blank unless you log in as a lower level operator.



## Adding a logo to your receipts

**DISCLAIMER:** This article involves *Advanced Customizations*, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

One of the new features that was added back in version 4.0 was the ability to add graphics to the receipts and other forms, so company logos can be used. However this is probably not utilized by many people because it's an Advanced Customization. While there is some technical savvy required to do this, here are the basic steps involved that may be sufficient for you to do it.

Of course this isn't limited to just company logos. You can add any graphic you want -- associate membership medallions, official seals, a photo or small map of your campground, decorative graphics, "form stamps" with boxes for them to enter their information, etc -- anything that can be a digitized image.

First of all, the logo needs to be in a BMP format. It can be either black and white or in color, but the file format should be 256-color BMP, with RB encoding. More details on how to get an image in this format can be found in the documentation for Bitmap Element Fields (e.g. in the Help Topics under Maintenance / Advanced Customizations / Forms / Editing Form Elements), or you can access that topic online here:  
<http://campgroundmaster.com/help/editingformelements.html>

Ideally the logo image should be created as the correct size, in pixels, to result in the right size image on your printer. This can take a fair amount of experimenting though, and isn't essential because it can be stretched or shrunk to the right size in the form definition -- it's just a matter of whether the resulting logo looks good enough.

Now to get the logo on your receipts, there is an easy way and a hard way:

The easy way will work if it can fit on the receipt without moving any of the existing text (e.g. company name & address, etc.). This involves just adding an element to the "canned" form definitions to put the logo on top of the current form.

The hard way is required if you need to move (or remove) some of the existing text in order to put the logo where you want it.

### The Easy Way:

Here are the basic steps for the easy way:

1. Go to Maintenance / Advanced Customizations / Forms
2. Select the desired receipt format or form (confirmation letter, etc.) that you want to modify, and click Edit Form definition.
3. Click Add Element.
4. Select "Bitmap" for the Element Type. Note: If Bitmap isn't an option, then this is a form with a format of "Character positions", such as for a 3" receipt printer or E-mail. graphics cannot be added to these types of forms.
5. Configure the Top and Left to be "Absolute (in region)", and enter the desired positions for the top left of the bitmap image.

6. There are different options for the Bottom and Right, as described in the documentation, but the most common is to select "Relative" and enter 0 for Bottom, which will make it keep the correct aspect ratio, and select "Absolute" for the Right position with the desired location of the right side of the logo. For instance if you want it 3 inches wide and the Left position was 2 inches, then make the Right position 5 inches. This will force it to be 3 inches wide, and adjust the height as needed to keep it in the correct aspect ratio.

7. Select the logo file using the Browse for file button.

8. Click Save to save the element.

Now you can use Save & Test form to see how it looks, and go back to make adjustments as needed.

### The Hard Way:

If you need to do it the hard way, then you will first need to import the sample form that imitates the receipt format you want to modify. For details, see the documentation on the following page, under "Making other changes to the default formats -- Importing and changing templates ":

<http://campgroundmaster.com/help/formssetup.html>

Once you have the sample imported (which will add form definitions to the list such as "Custom full-page receipt"), select the appropriate custom form and edit it to move things around. We can't go into details of editing the form here because there are a lot of different possibilities, but basically you need to be familiar with forms editing and adjust the positions of regions and/or other elements as needed. If this isn't something you have time to learn, then contact us for a quote on customizing the form for you.

Once you have things moved around to make room for the logo, then follow the same procedures as detailed in the easy way above to add the logo element.

This can be a challenge but we hope you have fun with it. We would love to see the results -- send us a FAX or screen shots of your receipts with logos on them!

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## Newsletter #31 (May 24, 2008)

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## **Q & A**

### **Retrieving credit card information**

**Q: After upgrading to the 4.3.5 release, why doesn't it retrieve credit cards for payment that were entered in the reservation's guarantee information or in a previous deposit?**

A: This is part of the new security features that are enabled by default, but more importantly it keeps you from getting charged too high of a rate for the credit card payment (assuming you're processing the cards through Campground Master). Since cards entered in the Guarantee information or for a Deposit over the phone don't have the "swipe data", if that card data is used for a payment later then it's a "card not present" transaction -- which usually incurs higher processing fees. You should always ask the customer for their credit card and swipe it when they are there paying their bill, even if they're using the same card as before.

Of course if you need to get the Guarantee credit card information for charging outside of Campground Master, you can also go into Reservation Details to see the Guarantee Info (or in Customer Details, if that's where you originally entered it).

If you're sure you want the old information to be retrieved automatically, then you can change this option under Maintenance / Credit Cards / Security Setup. Also be sure to read the help in the Credit Card Security Setup function for complete details about the consequences of changing the settings (press F1 when you're in the Security Setup dialog).

### **CVV code entry field missing**

**Q: Why doesn't the CVV code entry field show up on Guarantee info or Deposits, after the 4.3 update?**

A: Part of the PCI compliance rules state that the security codes on credit cards should never be stored on a computer. So by default, the entry of this code is disabled for Guarantee Information unless you process credit cards through Campground Master -- in which case it's enabled only for use when entering a Deposit transaction immediately after the Guarantee (after which the code is discarded). If you don't process credit cards through Campground Master, it's disabled for Payments & Deposits also.

If you want to bypass the PCI compliance (at the risk of merchant fines), you can re-enable the CVV code under Maintenance / Credit Cards / Security Setup. Uncheck the option for not entering the code for Guarantees, to get it back in the Guarantee Info. If you want the CVV entry on Payments & Deposits and you don't process cards through Campground Master, then uncheck the option for discarding the code after payment processing.

### **Changing the price of an item at check-out**

**Q: How can I arbitrarily change the price of something added in the POS Sales Entry? For instance after adding a bottle of Propane, we often need to adjust the amount.**

A: You could add adjustment transactions after adding the item, for instance as a Discount, or you could use the Other Charge button to enter the price manually instead of selecting the item from inventory. However if it's an item where you need to change the price frequently, you can also select the "Ask" option for that item in the POS Inventory Item Setup so it always asks for a price. (This option was added in a recent version.) Then, when adding the item in the POS Sales Entry, it will default to the price specified but the price can be changed when needed.

### Printing a report with readable text

**Q: When I try to print a report, the print is so small I can't read it. How can I change the font?**

A: It's doing this because the option to "Fit to page horizontally" is selected, so it shrinks the font as much as needed to get it on one page. Of course if the report is many columns wide, then it may have shrink the text beyond readability. Under the File menu, uncheck that option so it will print in a normal size. To further refine the font size if that's too large or small, you can change the Zoom percentage under File / Printing Options.

### Reporting the number of reservations made

**Q: We are interested in generating a Report which shows the number of reservations \*taken\* in a particular week. Can this be done and how?**

A: One way is to go to Reservations / Find Reservation, and filter by "Date made" (and uncheck the other "Filter-by" box so only the date is filtered). This will give you all reservations made during a specified time period.

However, if you've installed version 4.3, then the How-Heard report now has an option you can select to Report by Date Made, so you can easily get a summary this way. There are also some new sample Queries that give summary reports for the number of reservations made, grouped by Reservation Type, Site, Site Type, and Operator. Go to Maintenance / Advanced Customizations / Queries, click "Import queries", and open the file "Sample Query - Reservations made (statistics by date-made).csv". This will be in the folder C:\Program Files x86\Campground Master\Samples\ This will add several queries with different grouping options (by site, site type, reservation type, and operator), which will be available under the Queries tab view.

### Tracking E-mail confirmations sent

**Q: Is there a way to know if a confirmation E-mail has been sent to a customer?**

A: If you want to have your sent E-mails show up in your regular E-mail program, we recommend that you put in a "BCC" address (e.g. your own E-mail address) so that you get a copy of each E-mail sent. This is configured under Maintenance / E-mail Setup / SMTP Setup (or in older versions, Maintenance / Park Setup / SMTP Setup). However you can also find a record of all E-mails sent through the Audit Trail (View / Audit Trail, or better yet from a customer's Reservation Details, use the Audit Trail button at the bottom). You can filter it to show only E-mails sent.

### Reporting taxable sales

**NOTE: This information has been updated and added to the documentation under Taxes Setup (<https://campgroundmaster.com/help/taxessetup.html>). Refer to that for current information.**

Original article:

**Q: How do I get a report of taxable and non-taxable sales, e.g. for our quarterly sales tax returns?**

A: Because it doesn't keep track of which amounts were taxed, there isn't a specific report for this. Here are 2 ways you can get taxable sales information:

1. Use a category report ("Charges by Category" or "Receipts by Category") to get categorized sales, and total up the categories that are taxable for each tax rate. This of course requires that you set up your categories such that it's clear which are taxable and which are non-taxable, for each tax authority. For instance if you tax cabins one way and tents another, then don't just use the default "Daily Rate" category in all of your daily rates.

Set up a "Cabin daily" category and a "Tent daily" category, and use them accordingly (see Pick Lists / Transaction Categories).

2. Use the category report as above, then calculate backwards from the tax categories shown (divide by the tax rate as a decimal number). For instance if Sales Tax shows \$100 collected and your sales tax rate is 5%, then the taxable sales for that is \$100 divided by .05, which is \$2000. Of course this may not exactly match your sales, since the individual sales are rounded, but it should be close -- also be aware that it's based on tax actually collected, whether you collected the appropriate amount or not, so it assumes that your tax options and rates are configured properly.

**IMPORTANT:** Do NOT use the "Taxes by Tax Category" report unless your accounting is accrual-based and tax liability is according to when you take the reservation, or if you're entering (or auto-calculating) charges/taxes only when the customer checks in or pays in full. Like "Charges by Category", "Taxes by Tax Category" reports tax amounts as of when they're entered in Campground Master -- so unless you're using Campground Master in the "recommended" way (entering no charges until the customer checks in and/or pays), this will show taxes sooner than they're due. If your accounting is cash-based and you want to report tax as it's collected (paid), use the "Receipts by Category" report in the procedures above.

### Selecting sites by rig length

**Q: How can we tell whether we have a site available which will accommodate the callers rig when we receive a phone inquiry?**

A: When you're making a reservation, fill in the Rig Size (down in the customer information area). Assuming you have the "Use Preferences" box checked, it will then only show sites that will accommodate that size, according to the "Max Rig Length" attribute in your Sites setup (in Site Details, click More Site Attributes to set the max rig length).

### Handling a returned (bounced) check

**Q: How to I enter a transaction for a returned check?**

A: If you want to show that the check was returned and they still owe the money, then just enter a Payment with a negative amount (manager or higher access level is usually required for negative payments).

If you want to also cancel the charges (as a write-off) so they don't have a balance due, then you need to first put in the negated charges. For instance go to Select Rates, add the rates to be negated, and check the "Invert amounts" box to make them negative before clicking Done. Then, enter a negative Payment (or a Refund) so the balance is \$0.

You can also add a Memo transaction to show the reason for the entries, or just change the Description of the Payment or Refund to show something like "NSF" (this is bank language for Insufficient Funds).

### Changing access levels for Tab Views

**Q: How can I keep lower-level operators from getting to the Transactions tab view?**

A: This used to be a setting under Park Setup / Access Levels, but in version 4 and later this is configured in a different place (because tab views are more customizable). Go to Maintenance / Advanced Customizations / Tab Views. You will see a list of your tabs, and you can Edit each one to set the access level required to view it and/or print it.

## **Tips & Techniques**

### **Getting an E-mail list of people checked in**

If you've upgraded to the 4.3 version, there is a new Customer E-mail list function under Reports, with optional filtering. Also on the tab views like On Site you can right-click, go to "Print for all shown reservations", and then "Customer E-mail list".

If you have not upgraded, you can still get a list of E-mail addresses for people checked in. On the On Site tab view, simply click on Options and enable the E-mail field so the E-mail is shown.

Now you can use that list of E-mails a couple ways -- one way would be to simply copy them out of that list into your E-mail program, assuming it can handle a list of with one E-mail per line. Highlight that whole column (click on the first E-mail address and drag down until all are selected), then Ctrl-C to copy, and then do whatever you need to do to get them into your other program.

You could also export the list to a "CSV" file that you can probably import into your E-mail program.

For more details on sending out E-mails, see this article about mass mailing:

[http://campgroundmaster.com/news/softwarefore\\_mailingtoyour.html](http://campgroundmaster.com/news/softwarefore_mailingtoyour.html)

### **Adding a custom "Thank You" message on receipts**

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The addition of custom Form definitions in version 4 has been very helpful for some of our users, but it's also one of the most difficult features to master due to its technical nature. Other than the sample forms that you can import to modify if needed, there has been little in the way of examples because anything more than the simplest of additions involves many steps that must be done precisely.

That said, here is an example of how you could add a large, angled, colored "Thank You" to the bottom of your full-page receipt, for instance to look like it was applied with a rubber stamp.

1. Find out which receipt format you're using -- e.g. in Reservation Transactions, look above the "Print Reservation Receipt (All)" button. This is the receipt format selection.
2. Go to Maintenance / Advanced Customizations / Forms.
3. Select (click on) the receipt format you want to modify, and click "Edit Form Definition" to edit the form. Note that you won't see any elements in the definition, because this is really an "add-on" definition to a pre-defined form. Anything you add here will be printed on top of the pre-defined format. (If you wanted to make changes to existing parts of the form, you would have to create the whole definition -- but there are Sample forms you can import that already mimic the pre-defined forms. See the documentation for details.)
4. Click "Add Element"
5. For the Element type, select "Text"

6. The Top and Left entries should each should show "Absolute (in region)" selected. Enter the number of inches for the location of where the top left corner of the text should start, as measured from the top left corner of the paper. This may take some experimenting to get right, but just take a guess for now -- e.g. try a Top of 8 and a Left of 3.
7. Enter the desired message in the "Text" box, e.g. "Thank you for your patronage".
8. If you want a color other than black, click the "Text" button next to the color to change the text color.
9. You can also change the font style, size, etc. if needed -- again, you'll probably want to experiment with this.
10. The alignment could be changed in "Align Text", but we recommend leaving it as Left aligned. However if you want your text centered in the page, then select Center alignment, and then also change the "Left" position (in the previous step 6) to 0.
11. Unless your text is long enough to fill more than one line, uncheck the Auto-wrap option.
12. If you want your text at an angle, you can enter an Angle. For instance, enter 20 to angle it 20 degrees upward.
13. Click "Save" to save the element, and then click "Save & Test Form" to see what it will look like. Click the Close button on the preview if you don't want to print it.
14. If it's not what you wanted, click Edit Element to go back and make changes as needed.
15. Depending on the form and on the location of your added message, you may need to reduce the number of transactions printed per page so it doesn't overlap your message. To do this, change the "Trans. rows/page" value. Typical may be 20 to 30, depending on the form.
16. Save the form when finished.

### Adding # of Nights to the On Site tab view

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

We've had an example before of using the Queries customizations to add a simple field to one of the tab view reports. This example is very similar, but goes one step further. rather than simply selecting a field, an Expression is used because a data field doesn't exist for the information we want.

In this case we want to show the number of nights in their stay, as a new column on the On Site tab. Since this is always just the difference between the first night and last night, there's no need for the database to keep this as a redundant data value. Luckily it's a commonly needed value so a function is available to get it easily.

1. In the On Site tab view, click the Options button.
2. Make sure the selection for "Query to add with additional info" is blank (no query selected), and click Edit Query. Click Yes on the prompt to enter Query Setup.

3. Click Add Query.
4. Click the "List Query" button.
5. Enter a query name, such as "Nights Stayed".
6. Make sure the Base Table selected is Reservations.
7. Click Add Column.
8. In the Field/Expression area, type this expression:

```
ResvNights(ThisResv())
```

As with any expression, all characters are critical -- do not add any spaces, make sure the correct punctuation & parenthesis are used, and capitalize the specific letters shown.

9. Enter a column heading, e.g. "Nights".
10. Check the box "Show group totals", with "Sum" selected next to it. This is optional, but it will let you see a total of the nights stayed for all reservations shown.
11. Change the Align Text option to "Right".
12. Click Save, then Save again, and then Close to get back to the On Site Report Options.
13. Now select this query you just added in the list for "Query to add with additional info", and click Save.

Now your new "Nights" column will be shown after all of the normal columns (selected in the Options). As with any tab view add-on query, you could add as many columns to the query as you want, and they will all be added to the right of the normally selected columns.

### Changing a reservation's color if there's a note on it

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<https://campgroundmaster.com/help/overview32.html>

We've shown before how to add color-coding for specific reservation types. There are a lot of other things you could do with color coding, since any expression can be used to define the rules. This example shows how to change the color if the reservation has a special tag in the Notes field.

The majority of the Color Scheme setup would be done the same way as if it's a special reservation type -- except the conditions for the rules would be checking a different field. Refer to this article for the details of setting up such a color scheme:  
<http://campgroundmaster.com/news/colorcodingspecialreservati.html>

The only difference is that in the color rules, the condition expression would not check the Resv:Resv\_Type field. For instance, instead of `Resv:Resv_Type = "Weekly"`, the expression would contain something like this after the "AND":

```
Resv:Resv_Notes != ""
```



This will make it use that color if there is anything in the Notes field. To be more specific, lets say that you use a special tag in the Notes, such as "P/D" if they're past-due. You can use the FindNoCase() function to see if this appears anywhere in the notes, ignoring whether it's upper or lower case:

```
FindNoCase(Resv:Resv_Notes, "P/D") != 0
```

Remember that this would replace the `Resv:Resv_Type = "Weekly"` expression in each of the rule definitions -- you probably would still need to have several rules to check for the various status conditions, as described in the original article.

Getting more sophisticated, you might want to set up a special field for your tag, instead of using the Notes field. You could use one if the existing Reservation "Attribute" fields (Preferences), perhaps renamed to something like "Past Due". To use one of these for your purposes, follow these steps:

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" and other fields accordingly, e.g. to "Past Due". Note that you should use one of the yes/no attribute fields, e.g. 20A, 30A, etc.
2. Optionally, 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 to, you need to go into Reservation Details for those reservations, then click "Site Preferences", and check the appropriate box to make it show "Must Have".

Make a note of that field ID for use in the color scheme rules, and compare it to the text "Must Have" (which is what it will be if the box is checked). For instance if you use the 20A attribute, the expression will be:

```
Resv:Attrib_20A = "Must Have"
```

Again, that only replaces the `Resv:Resv_Type = "Weekly"` comparison as shown in the original article -- the reservation status must also be checked in the expressions.

## Changing network "Master" computers

This article is obsolete -- refer to the documentation, "Changing the Master Computer" (<https://campgroundmaster.com/help/changingthemastercomputer.html>).

## Solving network synchronization troubles

**Update:** There is a new function for this, and revised documentation. See the details here:

<https://campgroundmaster.com/help/fullnetworkresynchronization.html>

## Newsletter #32 (June 24, 2008)

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### Contents

All contents of this newsletter have been removed as obsolete

## Newsletter #33 (July 9, 2008)

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### Contents

#### **Q & A**

- Showing upcoming payments due
- Handling seasonal campers
- Using a touch-screen monitor
- Disabling "Delete" for reservations
- Different color on the Rack for owners when they're here

#### **Tips & Techniques**

- Showing Customer Details during Check-in
- Solving backup "temporary file" errors

### Q & A

#### **Showing upcoming payments due**

**Q: On the "Payments Due" tab, I have "Show all with balances" checked. I know payments are due for some sites, but they don't show up unless I have already created a charge for that site, otherwise that site doesn't show up. Is there a way to get a report on all occupied sites that are due for payments irrespective of whether I created a charge for that site or not?**

A: You can do this by adjusting the Options on the Payments Due tab. For instance, check the "Checked in" box and then select whether you want to see it a number of days "since" or "until" their paid-thru date. This also requires that the "Last Night" of the reservation be a later date than their current "Paid Thru" date, though, otherwise it assumes the reservation is paid in full. In other words, for reservations that owe for the month of July, you would typically have the Last Night be July 31st, and Paid Thru be June 30th. So then it knows they will have a payment due for July.

#### **Handling seasonal campers**

**Q: How to I enter seasonal campers?**

A: You would of course need to have all of the Sites set up for the seasonals, then enter the reservations for the campers. If they pay monthly, select the "Monthly" reservation type for those reservations. If they pay a fixed amount for the season but don't necessarily all stay the same length of time, then it works best to add a separate "Seasonal" reservation type (under Pick Lists / Reservation Types), which will make it easier to set up Rates for them.

Ideally you would want to set up the rates for those also, especially if you're using auto-rates. There is an example for seasonal stays in the documentation (Maintenance/ Park Setup / Rates / Rates Setup Examples). If you do charge them a monthly rent, then you may want to investigate the Monthly Billing function under the Transactions menu (see the documentation for details on that).

### Using a touch-screen monitor

#### **Q: Will Campground Master work with a touch-screen monitor?**

A: We don't have specific support for touch-screens, but most of them now operate by simulating mouse clicks so it "works" as far as that goes. However the keyboard would still need to be used for entering data or numbers, and the mouse may have to be used for right-click menu functions (although you can sometimes simulate a right-click by a prolonged touch-and-hold).

### Disabling "Delete" for Reservations

#### **Q: Is there a way to disable the "delete" button for reservations? Sometimes the employees delete rather than cancel a reservation, and then we have no record of the canceled reservation.**

A: You need to make your employees log in under an operator name that does **not** have Administrator access. They should not have an access level higher than Manager, and for the lower ones use the Reservation level. See Maintenance / Park Setup / Operators to add the appropriate logins and to change the password for the administrator login.

### Different color on the Rack for owners when here

#### **Q: How can we use a different color for owners when they're on site?**

A: The way this is usually done is by using the "Free Stay" reservation type for owners when they're on site. You should have the owner reservation on the site for the long haul using the "Owner" reservation type, but then add another "Free Stay" reservation on top of that for the same person when they're actually on site. If you prefer it to be called something other than Free Stay, you can add a new Reservation Type (in the Pick Lists) -- just make sure the Base Type is still Free Stay (you can't add base types).

Free Stay reservations are already a different color according to the Color Key, so that should solve the color issue.

## Tips & Techniques

### Showing Customer Details during check-in

**DISCLAIMER:** *This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:*  
<https://campgroundmaster.com/help/overview32.html>

If you would like to have the Customer Details window open up automatically when a customer is checked in, for instance to verify their information, you can do it with a simple Event Action, under Advanced Customizations. (This requires Campground Master version 4.0 or later.)

1. Go to Maintenance / Advanced Customizations / Event Actions.

2. Click "Add event action".
3. Enter a name, like "Details after check-in"
4. For the Event Trigger, select "Check in reservation, after".
5. In the Action expression, put:

```
EditCustomer(ThisCust())
```

6. Click Save.

That should do it -- customer details will appear before the normal Transactions dialog so you can verify information before completing the check-in.

Note however that this is Customer details, not Reservation details, so changes to the number of people, discounts, etc. won't affect the specific reservation you're checking in. For that you would still need to go into Reservation Details. But whatever you do, don't be tempted to change this event to edit the reservation! That would cause problems because you might already be in Reservation Details when you do the check-in, resulting in reservation details being open twice and potentially causing data corruption!

## Solving backup "temporary file" errors, XP

**Note: This has been largely resolved in later versions. Here is the original article in case you have an old version (pre-version 6.0)**

If you get an error message when making a backup that reports an error writing to a temporary file, it may be due to a "stuck" file in your Windows "Temp" folder. Sometimes having too many files in the temporary folder can cause a problem, or it may be due to a file marked "read only" which Campground Master can't delete.

The steps below will left you clean out your Windows Temp folder, and hopefully solve the problem. This is actually something we do on a regular basis (at least once a month), because Windows and all sorts of other programs leave garbage files behind here, and it can cause problems with your system.

Note that these are for Windows XP. A similar procedure for Vista is available now in newsletter #34.

1. If you have not rebooted your computer today (restarted Windows), reboot it before continuing.
2. Right-click on My Computer, and select "Explore"
3. Double-click on the C: drive (the first one under Hard Disk Drives) to open it. (Note: if you have trouble double-clicking, then right-click and select Explore)
4. Double-click on Documents and Settings to open that folder
5. Double-click on the folder with your Windows user name (not All Users)
6. Here you should see a Local Settings folder. If not, you need to show hidden files. To do this:
  - In the menu, go to Tools, Folder Options.
  - Click the View tab.
  - In the list, under Hidden Files and Folders, select "Show hidden files and folders"
  - Click OK
7. Now double-click Local Settings to open it.

8. Double-click the Temp folder to open it.

9. Select all files dated prior to today, and delete them (highlight them and press the Delete key). You should have a Date Modified column -- you can click on that column heading to sort by date modified to make it easier to select the old files. Don't worry about any folders in here, just the files listed below the folders.

10. Also, if you see a file that's just the one character "~", or if it shows a file named "~.zip", then delete that one even if it's dated today.

Now try the backup and see if it works.

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## Newsletter #34 (July 27, 2008)

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### Contents

#### **Q & A**

- Reporting Receipts by Discount Used
- Viewing the notes entered for Misc. transactions
- Reporting reservations staying less than full month
- Correcting processed credit card payments
- Rates based on Rig Type
- Rates based on starting day
- Rates based on linked reservations
- Setting up rates for 50A

#### **Tips & Techniques**

- Networking optimization tips
- Solving backup "temporary file" errors, Vista

### **Q & A**

#### **Reporting Receipts by Discount Used**

**Q: How can I show the income (receipts) grouped by the discounts used? The Discounts quick-report just shows the amount of the discount, but I want to see our actual income from Good Sam and FMCA discount users.**

A: Version 4.3 or later is required for this, due to a change that allowed the "Discounts" grouping to look at the Reservation's Discount Used field when the transaction itself doesn't have the discount filled in.

Start with either "Charges by Category" or "Receipts by Payment Method", depending on which information you need to see, then go back to Summary Options and change the Group-total-for-each option to "Discount Used".

### Viewing the notes entered for Misc. transactions

**Q: We enter notes on Miscellaneous Expense transactions, but how do we see those notes later?**

A: Those notes are put in the "Reference" field of the transactions. So on the Transactions tab view, click on Detail Options and then check the "Reference" box to show that field.

### Reporting reservations staying less than full month

**Q: We want to get a report of all reservations from June who did not stay a full month. How do we do that?**

A: You can use the Find Reservation to get reports like this. Go to Reservations / Find Reservation, then click on the "Reservation Filtering" button.

To only see reservations in June, select the "Filter by date" option, "Start-to-end inclusive", and select the dates June 1 to June 30. Now to only see ones that did not stay at least a month, click Filter by length of stay, and enter 29 for the Maximum days. You can easily see how other variations could be done, for instance if you only wanted the ones that started in June (to exclude the ones started in May).

Click OK, then make sure that both the "Filter by date" and the "Filter by" boxes are unchecked so it only uses the filter settings. Now you can print or export that report.

### Correcting processed credit card payments

**Q: Due to a computer glitch, a credit card transaction was processed but does not show up in Campground Master. How to enter the payment without processing it again?**

A: All you have to do is disable the processing option (uncheck the "Enable" box in Maintenance / Credit Card Processing Setup), then enter the credit card payment. Then go back to Processing Setup and re-enable processing. It won't try to process any payments you entered while processing was disabled.

### Rates based on Rig Type

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

**Q: How do we make a Rate that depends on the rig type? For instance, if someone just puts a tent on an RV site, we charge a different rate.**

A: If you're using version 4.2.2 or later, you can do this using the "Advanced Condition Expression" setting in the Rates definitions.

For your example, this is what needs to go in the Advanced Condition Expression for the tent rate:

```
Cust:Cust_Rigtype = "Tent"
```

It has to be exact (and the example assumes your Rig Type pick list selection is "Tent"), so use copy/paste if possible.

For the non-tent rate, you would make it:

```
Cust:Cust_Rigtype != "Tent"
```

Technically you would only need the expression in one or the other, as long as it's added to the one appearing first on the rates list -- it would use the other rate by default if the first one doesn't apply. However we recommend setting the expression in both rates in case you change the order later.

### Rates based on starting day

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<https://campgroundmaster.com/help/overview32.html>

**Q: How do we make a Rate that depends on the day of the week? For instance, if a 4-day reservation starts on Monday, we have a discounted rate.**

A: If you're using version 4.2.2 or later, you can do this using the "Advanced Condition Expression" setting in the Rates definitions.

First, assuming this is for a rate that's at least 4 days but less than 1 week, you would need the rate to be set up as "Applies if >= 4 days" and "Applies if <= 6 days".

Then, put this in the Advanced Condition Expression:

```
DoW(Resv:Resv_First_Date) = 2
```

It has to be exact, so use copy/paste if possible. The "Dow" function gets the day of the week, and 2 is the value for Monday.

Also note that you should have this rate above the normal daily rate in the list (so it checks these conditions first), so then for any extra days it will use the normal daily rate.

### Rates based on linked reservations

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<https://campgroundmaster.com/help/overview32.html>

**Q: How do we make a Rate that depends on other linked sites? For instance, our boat slip rental is cheaper if they're also renting an RV site.**

A: If you're using version 4.2.2 or later, you can do this using the "Advanced Condition Expression" setting in the Rates definitions. This is a much more complicated condition than the others given in the previous example, because it has to look at all other reservations linked to this one to see if any of those are on an RV site. Note that this assumes the linking type is synchronized or sub-member linking. Non-synchronized linking results in separate billing, in which case the expression shown below would not give the discount.

For the Boat Slip rate that is WITH an RV site (e.g. discounted), the Advanced Condition Expression should be::

```
LoopSum(1, ResvNumLinkedResvs(ResvLinkedMaster(Resv()), "#",
'iif(Left(FieldText(ResvSite(ResvLinkedResvAt(ResvLinkedMaster(Resv()), #)),
"Attrib_Site_Use"),2) = "RV",1,0)') > 0 OR
Left(FieldText(ResvSite(ResvLinkedMaster(Resv()), "Attrib_Site_Use"),2) = "RV"
```

and for the rate that is WITHOUT an RV site:

```
LoopSum(1, ResvNumLinkedResvs(ResvLinkedMaster(Resv()), "#",
'iif(Left(FieldText(ResvSite(ResvLinkedResvAt(ResvLinkedMaster(Resv()), #)),
"Attrib_Site_Use"),2) = "RV",1,0)') = 0 AND
Left(FieldText(ResvSite(ResvLinkedMaster(Resv()), "Attrib_Site_Use"),2) != "RV"
```

The expressions above assume that any Site Class pick list item(s) for RV sites start with "RV", for instance if you just use the default "RV's" Site Class. The expressions would need to be changed appropriately for any other situations.

Note: The expressions will be shown as multiple lines above, but make sure that any line breaks are removed if you copy/paste the expressions. If you don't copy/paste, the expressions must be exact in every way. Where you see a line break above, you should have a space (e.g. there should be a space after the commas and before & after any "=", "AND" or "OR".)



## Setting up rates for 50A

**Q: How should I set up sites and rates for 50A -- as an add-on or as a rental rate, and should I use an option or a different site type?**

A: If you set up a separate site class/type, then it would always charge the 50A rate for that site whether they really use 50A or not. If that's the way you want your rates to work then that's the best way to do it -- as a different site type, and a corresponding rate.

However if you only charge them if they say they're going to use 50A, then you need it to be an option. If you don't already have the 50A attribute set up as a quick-preference option, this article shows how to do that:

<http://campgroundmaster.com/news/addingoptionslike50atnew.html>

Once you're using that 50A option, you can set it up either as an add-on charge or as a separate Rental Rate. One advantage to making it as an add-on is that you generally only need one extra rate definition. If you make it as part of the rental rate, then you will have to duplicate all of your applicable rental rates to have 50A versions of each of them (if you have multiple seasons, etc. then this could be time consuming). So we usually recommend defining it as an Add-on rate. Of course the key either way is to select the 50A field in the "Applies if reservation field" part of the rate definition. This example for a cable rate has some details:

<http://campgroundmaster.com/news/ratesforadd-ons.html>

You'll also find a specific example of a 50A add-on rate in the Rate Setup Examples:

<http://campgroundmaster.com/help/ratesetupexamples.html>

## Tips & Techniques

### Networking optimization tips

One of our users has been working on some issues with their wireless network, and discovered several tips for making things run more smoothly. Most of these apply to wired networks as well, so if you're experiencing any disconnection or slow connection issues then it may be worth having your IT person review these and make the suggested tweaks.

- 1.) Make sure ALL the computers that are being used to make up the network have the identical "work-group" name.
- 2.) Make sure the IP address is the same except for the last number. Example: The Firewall Router would normally have an IP address of 192.168.1.1, Computer One would have an IP address of 192.168.1.2, Computer Two would have an IP address of 192.168.1.3, Computer Three would have an IP address of 192.168.1.4, and so on down the line.
- 3.) Make sure the Subnet mask, Gateway and DNS are all the same on each computer.
- 4.) Make sure that each computer has a different "computer name", making it unique on the network.
- 5.) Make sure any wireless devices are set to the correct operating channel (I usually use one that is not as common so it will have fewer issues if there are other wireless devices in the area.)
- 6.) Set the Router's firewall to be able to communicate on the proper ports for outgoing and incoming traffic. I normally set this to be specific to the device, channel and IP of the equipment that is being used on the network.
- 7.) Do not have wireless devices broadcast the SSID, for added security.
- 8.) Disable the DHCP on the Router and set the devices connecting to the network with a static IP address to avoid any IP conflicts, also set the Router to only allow by the network MAC address of the network cards of the computers on your network to further secure your network.

If you wanted to be able to split your network from the one that you are using so that you could offer Internet service to your customers and secure your network at the same time then that is a different scenario, but can be done with a little more work.

## Solving backup "temporary file" errors, Vista

**Note: This has been largely resolved in later versions. Here is the original article in case you have an old version (pre-version 6.0)**

Last newsletter had this procedure for XP -- here is the procedure for Windows Vista.

If you get an error message when making a backup that reports an error writing to a temporary file, it may be due to a "stuck" file in your Windows "Temp" folder. Sometimes having too many files in the temporary folder can cause a problem, or it may be due to a file marked "read only" which Campground Master can't delete.

The steps below will left you clean out your Windows Temp folder, and hopefully solve the problem. This is actually something we do on a regular basis (at least once a month), because Windows and all sorts of other programs leave garbage files behind here, and it can cause problems with your system.

Note that these instructions are for Windows Vista. A similar procedure for XP is also available, in newsletter #33.

1. If you have not rebooted your computer today (restarted Windows), reboot it before continuing.
2. Right-click on My Computer, and select "Explore"
3. Double-click on the C: drive (the first one under Hard Disk Drives) to open it. (Note: if you have trouble double-clicking, then right-click and select Explore)
4. Double-click on "Users" to open that folder
5. Double-click on the folder with your Windows user name (not All Users).
6. Here you should see an AppData folder. If not, you need to show hidden files. To do this:
  - In the menu, go to Tools, Folder Options.
  - Click the View tab.
  - In the list, under Hidden Files and Folders, select "Show hidden files and folders"
  - Click OK
7. Now double-click AppData to open it.
8. Double-click the Local folder to open it.
9. Double-click the Temp folder to open it.
10. Select all files dated prior to today, and delete them (highlight them and press the Delete key). You should have a Date Modified column -- you can click on that column heading to sort by date modified to make it easier to select the old files. Don't worry about any folders in here, just the files listed below the folders.
11. Also, if you see a file that's just the one character "~", or if it shows a file named "~.zip", then delete that one even if it's dated today.

Now try the backup and see if it works.

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## Newsletter #35 (Sept 29, 2008)

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### Contents

#### Q & A

- Fixing lost transactions after a split
- How to un-split a reservation
- Rates for last-minute reservations
- Adding charges when a reservations is made
- Fixing an electric meter reading
- Fixing transaction overlaps on receipts
- Reporting average nights stayed

#### Tips & Techniques

- Showing underlined letters for hot-keys

#### Q & A

##### Fixing lost transactions after a split

**Q: I was trying to move one of our long-term guests from one site to another using the "Split reservation at this date", but lost all data in the Transactions field. How do I recover this data?**

A: The transactions are probably still there but under the "old" half of the split, which means the wrong linking method was selected when doing the split.

After confirming that the transactions are in the other half, Delete the reservation that's missing the transactions (under Reservation Details, click "Delete" to completely remove it). Then correct the dates on the other half to what they were. This may require undoing a check-out or check-in so the First and Last night can be changed, depending on the situation -- to undo Check-in or Check-out, click on the "Checked in" or "Checked out" box in the Status area of Reservation Details. Once it's fixed up like it was before, try the Split again. This time make sure you choose the option marked "Recommended", which is making the first part a sub-member of the 2nd part.

##### How to un-split a reservation

**Q: I split a reservation by accident (selected the wrong one) -- how do I correct this?**

A: There isn't an un-split function, so you need to delete the extra reservation and fix the dates and status to what they should be.

First figure out which of the two reservation halves has the transactions (assuming there are any transactions added yet). If the split was done with a sub-member option, it may actually look like transactions are on both reservations, but they will actually be linked to only the "Linked master" reservation. You can see which one is the Lined master by double-clicking on one of the reservations to get the quick-info window. At the bottom of this window it will show "This reservation is linked...", and one of them will have "[Linked master]" after it. Make a note of which dates are shown for that.

Also be sure to make a note of the overall first and last night of the combined reservations, and also the Auto-charged-through and Paid-through dates, , since you'll need to know those to fix them later.

Now you need to go into Reservation Details for the reservation that is \*not\* the Linked master (the one without the transactions), and Delete it (click the Delete button at the top).

Next, go into Reservation Details for the remaining reservation and correct the dates and status. This may require undoing a check-out and/or check-in so the First and Last night can be changed, depending on the situation -- to undo Check-in or Check-out, click on the "Checked in" or "Checked out" box in the Status area of Reservation Details.

Now correct the First and Last Night to what they should be for the whole stay, and then if necessary do the Check-in again if they're a current reservation (be sure to answer "No" when it asks if you want to make it start today).

Finally, double-check the Auto-charged-thru date (if applicable) and the Paid-through date, which may have changed when the split was done, and update those to what they should be.

### Rates for last-minute reservations

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<https://campgroundmaster.com/help/overview32.html>

#### Q: How do we make a higher Rate for last-minute reservations, e.g. if they make the reservation less than 2 days in advance?

A: If you're using version 4.2.2 or later, you can do this using the "Advanced Condition Expression" setting in the Rates definitions.

Create a new rate definition (e.g. make a copy of the normal daily rate), with the amount changed for the last-minute rate.

Then, put this in the Advanced Condition Expression:

```
Days(Resv:Resv_First_Date, Resv:Resv_Date_Made) <= 2
```

It has to be exact, so use copy/paste if possible. The Days() function shown calculates the number of days between the first night of the reservation and the date it's made (e.g. like subtraction), so this rate will apply if it's made 2 or less days before it starts.

Also note that you should have this rate above the normal daily rate in the list (so it checks these conditions first), so this rate has priority over the normal rate.

### Adding charges when a reservation is made

#### Q: Can we have it add charges to a reservation when it's made, rather than when it's checked in?

A: Yes you can, but this will affect your reports. Technically, the "income" is reported on the day you add charges (that's when the rent is deemed to have been "earned", since that's when it's put in as a charge to the customer). Depending on how you do your accounting and which reports you use, this may or may not be an issue.

So, you first need to decide how it will affect your accounting, including your reporting of state sales tax (or GST). If you use the "Receipts by Category" report, for instance, this would not be a problem unless you take Deposits -- in which case the Deposit will immediately be applied to the Charges and Taxes (proportionally), and thus at least some of the income is earned on that day. If you don't take Deposits, then it may be safe to

add the charges early as long as you use one of the "Receipts" quick-reports for accounting, not the "Charges by Category" quick-report. Also note that if you export to QuickBooks, charges are always reported the day they are entered -- the Export to QuickBooks function always assumes Accrual-based accounting, not Cash-based accounting, as far as when the amounts go into the corresponding Accounts or Items in QuickBooks.

OK, so if you decide to do this, here's what you need to know. If you're using Auto-rates, simply change the option to auto-add charges when the reservation is Created, instead of when it's Checked In (see Maintenance / Program Options / Auto-Rates). If you use Select Rates to add your rates manually, or if you just use the Charge button to add manual charges, then just remember that if you're adding them under Quote/Confirmation then they won't be saved. Instead, go into Reservation Transactions (e.g. New/Edit Transactions under Reservation Details) when you add the charges so they're permanent. Then you can print the confirmation letter from there (select the Confirmation Letter in the drop-down list above the "Print Reservation Receipt" button).

### Fixing an electric meter reading (pre-10.0)

**UPDATE:** If you have version 10.0, you can use the new Undo Reading function -- see here: [Re-do meter readings](#)

For pre-version-10 users:

**Q: How to I correct a meter reading entry that was entered wrong, so the next time we put in a new reading it will calculate correctly?**

A: The last reading can be entered manually under Site Details. Right-click the site (on the Rack or in the Electric Meter Readings report), select Site Details, and change the "Last reading" number as needed.

This will not fix or remove any charges that were already added -- you will need to do that manually through Reservation Transactions.

### Fixing transaction overlaps on receipts

**Q: Some accounts have a statement several pages long due to the large number of charges. How do I get it to print out without going over the top of the "notice to guests" on the bottom of the page, and to use multiple pages if it's longer than the page?**

A: Version 4.0 or later is required for it to print multiple pages for a statement, which also helps prevent overwriting the notice. However if you already use version 4 and it still does this, then you may need to make adjustments.

There are a few different factors that can cause the notice message to overlap transactions.

1. The starting position of your notice (inches above the bottom). See [Maintenance / Printed Notices & Text, Notice message for Invoice](#), etc.... Adjust the Starting position to be smaller If possible.
2. The number of transactions printed each time --- you can use a "Print only some..." option to avoid printing the whole history of the reservation -- e.g. only print the current day's transactions, or since zero balance, etc.
3. The number of transactions per page, as defined in the Forms Setup (especially if you've enlarged the size of the notice text at the bottom to allow a larger message). Go to [Maintenance / Advanced Customizations / Forms](#), and edit the form definition for the receipt that you're using (e.g. select it and click "Edit form"). In the Edit Form Definition dialog, you'll see "Trans. rows/page" -- make that number smaller (count one that starts overflowing to see how many it can fit).

## Reporting average nights stayed

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<https://campgroundmaster.com/help/overview32.html>

### Q: Is there a report I can pull for average length of stay?

There isn't a standard report for that, but there are a couple options:

If you run the Occupancy report and the Arrivals statistics report for the same time period, then you can divide the occupancy total (total nights) by the arrivals total (total # stays) to get the average nights per stay.

Or, if you have version 4.0 or later installed, there is a sample Query you can import that does show the average nights per stay.

1. Go to Maintenance / Advanced Customizations / Queries, and click Import query.
2. Locate the folder C:\Program Files (x86)\Campground Master\Samples. (In the "Look In" drop-down at the top, start by clicking on the C: drive, then double-click the Program Files folder, etc. until you reach the Samples folder.)

Select the file "Sample Query - Average nights per stay, by site type" and Open it. That will add the query to the list. Close that dialog, and now you'll see a Query tab, between the Payments Due tab and the Transactions tab. Click on that, and select the above query from the drop-down list. Then just put in the date range needed.

## Tips & Techniques

### Showing underlined letters for hot-keys

In the documentation we mention that Alt- hot keys are underlined in menus and on dialogs. For instance the "F" is underlined for the File menu item, indicating that you can press **Alt-F** to go to that menu. However you may not be able to see these in Windows XP or Vista, at least not until you press the Alt key in the first place.

This is due to an option in XP and Vista to hide the underlines until you press the Alt-key, and in Microsoft's wisdom they seem to have enabled that option by default in some cases (why confuse the user with all those underlines, right?). So if you don't see any letters underlined in the menu or dialogs then just press the Alt key and the underlines should show up.

You can also disable this option in Windows XP by going into Desktop Properties (right-click on an empty desktop area), click the "Appearance" tab, click the "Effects" button, and uncheck the "Hide underlined letters" option.

If you're using Windows Vista, go to the Vista Control Panel - Appearance & Personalization - Ease of Access Center - Make the Keyboard Easier to Use. Check the box by "Underline keyboard Shortcuts & access keys".

## Newsletter #36 (Aug 22, 2009)

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#### Q & A

- Credit cards shown after 4.3.8 installed
- Turning off reservation linking
- Reporting occupancy by # of campers
- Reporting by Rate
- Entering old electric readings

#### Tips & Techniques

- Handling reservations with a balance due

#### Q & A

##### **Credit Cards shown after 4.3.8 update**

A: Due to an overwhelming number of customers wondering why it \*wasn't\* showing the previous credit card used by the customer, we changed the default settings to retrieve the previous card information. If you ever adjusted the Credit Card Security Settings previously, this won't be an issue -- your customized settings were saved. But if you never adjusted any of the security settings, the default used will change. Note that there may be a couple issues involved here:

1. If they're seeing the entire card number, rather than a masked number, that means they're logged in as an Administrator. You should lower the access level used by the normal operators to the Reservations or Manager level (see Park Setup / Operators), so they will only see the last 4 digits.
2. Ideally you do want to keep it from retrieving the previous card information at all, particularly if you process cards in Campground Master -- you get a lower processing rate if you swipe the card again whenever they make another payment, so hiding the card will force this. To change the option, go to Maintenance / Credit Cards / Security Setup. We also suggest that you view the Help for that screen (press F1) before making any changes to the settings.

##### **Turning off the Reservation Linking**

**Q: How do I turn off the linked reservation stuff? We don't want any linking, since making them Synchronized causes more work for us later to separate them, but we keep forgetting to uncheck the "Synchronize with" box.**

A: In the New Reservations dialog, click the "Linking" button. Select "Not linked at all", and check the box "Save the selected linking mode". Now they won't be linked unless you force the check boxes.

##### **Reporting occupancy by # campers on site**

**Q: I need to know how many paid campers I have each day. This means campers, not how many sites are filled or how much money I collected during the week.**

It sounds like what you need is an Occupancy report that reports by # of people instead of # of reservations. There isn't a built-in report for this (because the fields that count the number of people are re-definable), but there's a sample Query that does this if you still use the default # Adults and # Children fields.

1. Go to Maintenance / Advanced Customizations / Queries, and click Import query.
2. Locate the folder C:\Program Files (x86)\Campground Master\Samples. (In the "Look In" drop-down at the top, start by clicking on the C: drive, then double-click the Program Files folder, etc. until you reach the Samples folder.)

Select the file "Sample Query - Occupancy (# people) by reservation type.csv" and Open it. That will add the query to the list. There's also another version, "Sample Query - Occupancy (# people) by site type.csv", that you can also add. Close the Query Setup dialog, and now you'll see a Query tab, between the Payments Due tab and the Transactions tab. Click on that, and select the above query from the drop-down list. Then just put in the date range needed.

## Reporting by Rate

### Q: How can I generate a report by Rate?

A: It won't be possible to report totals by Rate -- once the transactions are added to a reservation from the rate, it has no reference to which Rate those came from (because Rate definitions can change later anyway). If you need to separate the rates when reporting, then you need to set up separate Transaction Categories for each one you want reported individually (see Maintenance / Pick Lists / Transaction Categories). Then edit your Rates to use those categories in the rate's Charge (click on the category in the grid to change it), and then you can use the standard category reporting to get your totals.

## Entering old electric readings

### Q: How can I enter electric readings for people who left 2 months ago?

A: Change the "Actual date of readings" in the Electric Meter Readings report. This date won't show on their bill or affect the date of the charges, it just determines which occupant is shown & billed. If you have different electric charges based on seasons, though, it will also affect which rate is charged (this of course may be what you want it to do).

## Tips & Techniques

### Handling reservations with a balance due

Having your campers check out with a balance due isn't fun (and unless you change the Program Option, it isn't allowed in Campground Master), but it probably happens once in awhile. Here are a few ways you can handle this, depending on the overall situation and how you want them reported.

If it's a write-off (you don't expect to see that customer again), there are a few options:

Option 1. Add a Payment Method (in Pick Lists) for "Write-off" and enter the balance due as a Payment, selecting that payment method. This would show on reports like Receipts by Payment Method and figure in your total receipts, though, which may not be desirable.

Option 2. Enter a negative Charge in the category that's being written off (and appropriate negated taxes), e.g. the same way you would do for shortening a stay or refunding an item. (Manager access is usually required for entering negative Charges). You can also use the Reverse Charges function to do this. This would not affect total Receipts, but would show in reports like Charges by Category.

Option 3. If you want to keep the original amount of the Charge reported in its original category even though it's being written off, first add a Transaction Category (in Pick Lists) for "Write-off". Then enter it on the Reservation as a Charge with a negative amount as above, selecting the new Write-off category. You also need to move the Write-off charge so it's above their last payment (if there was one), through Reservation Details / Transaction History, so it's reflected properly in Receipts by Category reports. For instance, if there



was a Rent charge of \$50, a payment of \$10 and then a Write-off of \$40, and you want it to show as Rent: \$50, Write-off: -\$40, then you need to move the Write-off charge above the payment. Otherwise it would show only as Rent: \$10 and the Write-off would not show on Receipts by Category.

Note that options 2 and 3 require that you are allowed to Check Out reservations with a balance. In versions prior to v10.0, go to Maintenance / Program Options / Functions, and uncheck "Don't allow a reservation to be checked out if it has a balance". As of version 10, the option to allow checking out with a balance is not a Program Options setting, it's an Access Level (Maintenance / Park Setup / Access Levels), with a default setting of "Reservations". You can set the operator level allowed to check out with a balance as needed, for either balance due ("Check Out a Reservation with a balance due") or a credit balance ("Check Out a Reservation with a credit balance").

Alternatively, if it's a balance you want to keep on the Customer info (you expect them back some day to pay the balance), then you would need to enter a negative Charge for the original category so the reservation balances out (again moving that above any payment), and enter an equal (but positive) charge for the same category through Customer Details / New/Edit Transactions. This leaves a balance due on the customer but the reservation is zeroed out.

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## Newsletter #37 (Mar 27, 2010)

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#### **What's New**

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- USB cash drawers and pole displays

#### **Q & A**

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- Avoiding accidental program closure
- Different rates by rig size
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- Tax rate changes (e.g. new HST in Canada)
- Adding "Due Back By" on custom receipts
- Importing a 2-up Ticket Form
- Query : customers excluded from E-mail

### What's New

#### **Port Forwarding help**

For those trying to set up the Networking option for remote access (to connect while at home or on the road, for instance), one of the most difficult issues is getting the Port Forwarding set up in your router. (A router is what most people use to connect the computer to the internet and local network.)

Here's a great web site that has specific instructions for port forwarding:

<http://portforward.com/>

This web site now has detailed configuration information for Campground Master -- just select your router/modem model from the long list on the main page, then select Campground Master from the list of programs. You will be given a pictorial walk-through of the configuration.

For more details on networking through the internet, refer to our online documentation:

<http://campgroundmaster.com/help/networkingthroughtheinternet.html>

## USB Cash Drawers and Pole Displays

Version 5.0 now includes support for cash drawers and pole displays with USB interfaces. This means there is no longer a need to have a serial or parallel port (since most new computers don't have them anyway). This also makes it possible to use a cash drawer without requiring a receipt printer to connect it to.

Note that the only brand of USB cash drawer supported is APG, and the pole display must be a Logic Controls brand. We do sell these items, so see our web site or contact us for more information.

## Q & A

### PCI Compliance

**Q: Is Campground Master PCI compliant as per the credit card merchant rules?**

A: If you're using version 4.3 or later, it is PCI compliant -- as long as you haven't disabled any of the compliance options under Maintenance / Credit Cards / Security Setup, and also assuming you have performed the PCI compliance functions under Credit Cards / History/Security cleanup. If you enter credit card information into Campground Master, always be sure you're using the latest version to ensure up-to-date compliance, and be sure to leave the security settings configured as directed for PCI compliance.

### Avoiding accidental program closure

**Q: Sometimes I click on the "X" by mistake when I want to minimize the program, and it closes. Is there an option to keep it from closing when the X is clicked?**

A: There's not an option exactly like that, but if you're not logged in as an Administrator level operator then it will prompt you when the "X" is clicked, e.g. "Do you really want to close the program", to minimize accidental closures. So we recommend that you use a non-administrative login for your normal operations, and only use an Administrator login when necessary for the higher level functions.

### Different rates by rig size

**Q: How can I charge 2 separate rates for the same RV site, if the rig is over or under 30 feet long.**

A: You can use the "Applies if reservation field" part of the Rate definition to make one rate apply if the Rig Length is >= (greater than or equal to) 30 feet. Make sure that the rate for >= 30 feet appears ABOVE the rate for under 30 feet (in the Rates Setup list), so it takes priority. Likewise you could have several brackets if needed, just making sure that they are in order from longest to shortest. Also note that it's not necessary (or possible) to use the "Applies if reservation field" option for the shortest rig length, as that rate will be used automatically if the longer rig lengths don't apply.

IMPORTANT: There are 2 "Rig Length" fields -- one for the Customer record and one for the Reservation record. Both are set at once if you fill in the Rig Length when making a new reservation, in the New Reservation dialog. The Customer field is only used to remember their size for next time -- it is not used for the current reservation. Changing it in Customer Details will not automatically change the Reservation's rig length field. So if you're setting the rig length after a reservation has been made and need it to be used for the rates, you must go to Reservation Details and set it through the "Site Preferences" function.

## Reporting rates & balances

### Q: How can I get a report showing site, name, rate, amount paid and balance due?

A: You can probably get what you want from the "On Site" tab view. Click the Options button on that view and enable the fields you want. While "rate" isn't an option, the "Auto-charges" will show the total auto-calculated charges so it should work if you have auto-rates set up correctly:  
[http://campgroundmaster.com/help/auto\\_ratessetup.html](http://campgroundmaster.com/help/auto_ratessetup.html)

Note however that it takes time to do the auto-charges calculation, so this will slow down the display considerably.

## Tips & Techniques

### Tax rate changes (e.g. new HST tax)

Canada is implementing a new single "HST" tax rate soon which will replace the old tax rates, so you may need to accommodate that in Campground Master. Here is how you can do that, and the same procedure can be used to implement any other new tax rate.

First of all, resist the temptation to just rename or delete the previous tax categories or tax rate entries -- you need those for prior reporting and to keep existing reservations from becoming corrupted. What you need to do is add a new tax rate for HST, and enable that for your Rates.

First go to Maintenance / Pick Lists / Transaction Categories. Check "Allow editing...", and Add a new record for the HST tax (or Insert it above the GST, if you like).

Then, add HST as a new tax under Park Setup / Taxes. Don't replace the others, just use the next empty slot. You probably don't want to check the "Default" option until the day it takes effect. This won't affect the Rates, but if you add Charges or Discounts manually, it determines whether that tax option is selected by default -- so change the Default selections only after the new tax rate is in effect.

If you also have Rates set up, you need to change the tax selection in them. To change the Rates to use the new tax (in Park Setup / Rates), Edit each rate definition and change the "Auto-add tax" checkboxes to add HST instead of the other taxes.

You can either wait until the day the new tax takes effect to change the rates, or you can make a new copy of all of your rates that need the tax rate changes and make the new rates take effect automatically after the change date by using the Season Dates Applicable, similar to preparing rates for a new year as described in this article:

<http://campgroundmaster.com/news/changingratesforthenewyea.html>

There are advantages to doing it as a 2nd copy, especially for auto-rates and/or if you add charges before they check in, since setting it up with "season dates" will ensure that the rates take effect based on the dates of the stay rather than when you add the charges. So this is the recommended method, however it is more time consuming.

### Adding "Due Back By" on custom receipts

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<https://campgroundmaster.com/help/overview32.html>

The original sample Form templates for receipts did not include the logic to show the end-of-period text for Scheduled (hourly) reservations. For instance, this might be set for "Due back by 1PM" for a 12PM hourly period in the Schedules setup. Here is how you can correct that.

Note that this is only an issue if you use Schedules, and only if you have set the end-of-period text for each period in your schedules.

1. In the Form definition, look for the Reservations & Site Info region (Edit the main "margin" region and you should see it).

2. Locate the expression that displays the last night (or period):

```
DateToText(Resv:Resv_Last_Date) +
iif(ThisSchedule() = NullRecord(), "", " : " +
FieldText(Resv(), "Resv_Last_Period"))
```

3. Change it to:

```
DateToText(Resv:Resv_Last_Date) +
iif(ThisSchedule() = NullRecord(), "", " : " +
FieldText(Resv(), "Resv_Last_Period") +
iif(FieldText(LinkedRecord(Resv(), "Resv_Last_Period"),
"Perd_End") != "", " (" + FieldText(LinkedRecord(Resv(),
"Resv_Last_Period"), "Perd_End") + ") ", ""))
```

The expression is broken into multiple lines for formatting here, but it must be continuous (no line breaks) when you enter it.

That should do it!

## Importing a 2-up ticket form

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation: <https://campgroundmaster.com/help/overview32.html>

There is a sample form that prints 2 copies of the Ticket Form on one sheet of paper. This of course reduces the space available for each, so it eliminates the "Additional Notes" part (if used) and limits the number of transactions that can be shown on one page.

1. Go to Maintenance / Advanced Customizations / Forms.

2. Click the Import Form(s) button, and you'll get a typical Windows file dialog labeled "Import Forms". You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\Campground Master\Samples. Use the "Look In" drop-down box at the top of the dialog to navigate up to C: if necessary, then double-click each folder (Program Files, then Campground Master, then Samples) to get into the Samples folder.

3. Now select the appropriate file, for instance "Sample Form - 2-up Ticket Form" to get the 2-up Ticket Form template, and click Open.

The new form(s) will appear at the bottom. You can use the Move Up function to move it to a different location in the list if preferred.

To make it the default receipt form, go to Maintenance / Printing Options / Receipts, and select that form for the default reservation receipt.

### Query customers excluded from E-mail

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<https://campgroundmaster.com/help/overview32.html>

Here is an example of a simple query, where the user wants a list of all customers that have the "Exclude from E-mail" flag set.

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. This particular query is one of the simplest to do.

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. "Excluded from E-mail"
5. Select "Customers" 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 -- e.g. First Names, Last Name, E-mail, State, 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. Now we need to tell it which customer records we need. Click "Edit Filtering Conditions...", then click "Add New Condition".
9. Enter the text below for the expression (all spacing and punctuation must be exact as well as the spelling and capitalization):  
  
`Cust:Cust_Exclude_Email = .T.`
10. Save that, then 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.

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## Newsletter #38 (July 26, 2010)

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### What's New

#### **Campground Master on your iPad, iPhone, or Android phone**

Campground Master is a Windows application so it will work on **Windows-based** tablets (e.g. Surface Pro, or any Windows 10 tablet).

We didn't create a special version for non-Windows devices (e.g. Apple or Android), and have no plans to do so -- however, you could use remote access apps like LogMeIn or TeamViewer to access your office computer from your phone or iPad.

### Q & A

#### **Moving receipt heading for window envelopes**

**Q: How can I move the park name and address in the receipt heading to the left side of the paper on the confirmation, statements and invoices? I would like to use window envelopes.**

A: Assuming you're using version 5.0, go to Maintenance / Printing Options / Offsets. Select the option at the bottom to "Position return address for window envelopes", and adjust the Top and Left settings if needed. This works on Confirmation letters, Quick Receipts, and the "Full Page" versions of the invoices.

#### **Phone number on "Find Customer" results**

**Q: When I find a customer and it brings up more than one customer by the same name, I would like to remove city and province and put the phone number field instead.**

A: The fields on the Find Customer dialogs can't be changed. However if you highlight both customers that show up on the "Find Customer" dialog and click "Merge Customers", then the phone numbers (and much

more info) will be shown in the Merge dialog. Then you can either merge them or just Cancel once you decide which one to use.

Also note that in the new beta release, the phone number field has been added to the Find Customer dialog (and the list of matching customers when making new reservations). Thanks for the suggestion!

## Per-person camping rate

**Q: We sometimes have a scout group or something similar where we charge \$8/person and no site rate. Any recommendations on how to handle this?**

A: You could create a special Reservation Type for it (see the Pick Lists), so you can set up your Rates for that Resv Type to charge \$0 for the site in the "Rental Rate" and \$8 per person as an "Add-On" rate.

Or if you wanted to get fancy, you could use the "Using Calculated Expressions for Transaction Values" functionality to have it calculate the total right in the Rental Rate. See the Rates Setup documentation for details on this, it involves Advanced Customizations so is not part of standard support. But just as a hint, using an expression for the Qty to charge for each adult and child would be: `ResvNights(Resv()) * (Resv:Resv_Adult + Resv:Resv_Children)`. Then just put \$8 in for Each.

## Use map dates when making reservations

**Q: Is there a way to sync the rack or map dates with the new reservation box? By that I mean, when someone calls to reserve, the easiest way to find them a site is to enter their dates directly in to the map tab. Then, we start a new reservation and we have to change the dates to match the map dates. Is there a way to sync those two automatically?**

A: If you double-click on the empty site on the map to start the new reservation (instead of using the menu or toolbar), it will use the dates from the map automatically.

Likewise if you double-click on an open site cell on the rack (the open cells under the dates, not the site number itself), it will either use the From/To dates (if you have "Available only" checked) or it will use the single date that you clicked under (if "Available only" is not checked).

By the way, there are a couple settings that also affect this -- in Maintenance/ Program Options, on the Reservations tab, be sure you check the "Use date selections from the Rack" option and the "Keep the Rack and Map views on the same date" option.

## Removing site number from confirmations

**Q: How do I keep the site number from showing on confirmations?**

A: Go to Maintenance / Printing Options / Reservations, and select: Use the Site "Type" on confirmations instead of the site name.

Note: In older versions, this option is under Maintenance / Printing Options / Receipts.

Also be aware that since this is in the Printing Options, it's separate for each workstation. So you need to change the setting on each computer.

## Automatically selecting appropriate sites

**Q: Is there a setting to allow CGM to quick pick sites when a customer makes a reservation? If not, the enhancement I would like to see (if it is not already there) is that CGM would pick a site for that reservation using the info the customer gives. For instance if a guest needs a 50 amp pull thru with phone access, CGM would pick a site that closes fits that info.**

A: In the New Reservation dialog, it will show the appropriate sites if you have "Show Available" and "Use Preferences" checked, and select the site type and other preferences you want (50A, phone, etc.). So then all you have to do is double-click in one of those sites. It also helps to use the Site Types for some things like Pull-thru vs Back-In, so you can select that easily from the drop-down list "All Site Types".

Note: You can have it always select Show Available and Use Preferences by default, under Maintenance / Program Options / Reservations.

If you don't yet have things like Phone and 50A as check boxes under Use Preferences, see this article:  
<http://campgroundmaster.com/news/addingoptionslike50atonew.html>

## Tips & Techniques

### Coloring empty sites for holidays and site type

**DISCLAIMER:** This article involves *Advanced Customizations*, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about *Advanced Customizations*, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

A previous article covered how to color-code the date column headings and also the empty sites for special dates like holidays. That article used a sample custom color scheme that you can import and modify. The article can be reviewed here:

<http://campgroundmaster.com/news/coloringtherackdatesforho.html>

Note: Old versions of the sample file used in the example above had a couple mistakes. The "Default scheme" selection should be "Open Sites (Rack)" rather than "Reservations". Also, the rules in the sample did not check for the "unavailable" status, which is shown below.

Now if you want to also use different colors for different site types, that's quite simple to do.

Starting with the example above, the expression for a rule for a simple holiday weekend color might be:

```
ColorStatusSite(ThisSite(), ThisDate(), ThisPeriod()) != 9 AND (ThisDate() = {7/2/2010} OR ThisDate() = {7/3/2010} OR ThisDate() = {7/4/2010})
```

Note that the ColorStatusSite() check is to make sure we don't include "Unavailable" sites in the new color rule.

Now if you want to only change the color for a certain Site Types, just add a site type check in front:

```
Site:Attrib_Site_Type = "Room" AND ColorStatusSite(ThisSite(), ThisDate(), ThisPeriod()) != 9 AND (ThisDate() = {7/2/2010} OR ThisDate() = {7/3/2010} OR ThisDate() = {7/4/2010})
```



Those are the basics. See the article mentioned above for more details, and remember to select your new color scheme for "Override empty Sites..." under Advanced Customizations / Select Global Color Schemes.

### Enforce 3-day holiday weekend reservations

**DISCLAIMER:** *This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:*  
<https://campgroundmaster.com/help/overview32.html>

**UPDATE:** Version 10.0 added a new feature to make this easier (and more comprehensive, for that matter), so you can use that instead of the old method explained below. See the new article:  
<https://campgroundmaster.com/news/reservation-restriction---3-da.html>

However the original method below will still work if you have more specific needs or don't have version 10.0 yet:

Standard disclaimer: This involves Advanced Customizations, which are beyond the scope of normal tech support -- aside from this example, you're on your own with the implementation of this function and any side effects it may cause if not done correctly.

Please note that this is only going to work well with single reservations or synchronized reservations -- if you use the New Reservation dialog to make multiple reservations covering different dates, this will not check them all.

1. The first step is to add a Dialog definition that's an Add-on to the New Reservation dialog. Go to Maintenance / Advanced Customizations / Dialogs, and click "Add dialog definition".

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition, for instance to force How-Heard to be filled in (described a previous newsletter article), then you would just add elements on to the existing one instead of creating a new one here (in which case, skip to step 3).

2. Give it a name, such as "New Reservation add-on". Then check the "Add-on" box and select "New Reservation" from the list. We're not adding any new controls to it, so the Width and Height values can remain 0.

3. Now we need to add an action to the dialog that checks the dates, showing an error message and preventing the reservation from being saved if they are not appropriate. Click "Add Element", and for the element type select "Action on data saved".

4. We don't really need a Condition for this element (assuming we always want it to enforce the rule), though you might want to add a condition so that only non-administrators are restricted, for instance. In that case you could put the following expression in the Condition box:

```
CurrentOpLevel() < 5
```

5. Now for the Action expression, which will be executed when the reservation is saved (e.g. "Done", "Continue", or any other button clicked that would normally save the reservation). We won't go into the design details, but it should be fairly self-explanatory if you look up the components in the Function Reference of the Advanced Customizations documentation. Also note that we need the Control ID of the How Heard field, which can be looked up in the Dialog Control ID reference. This can be found online here: <http://campgroundmaster.com/help/basedialogs.html>.

Basically what we're doing here is checking to see if the First Night is after July 4th or the Last Night is before July 2nd. If so then it's OK, the reservation doesn't include the holiday weekend, and we can return True (OK to continue). We're also checking the number of nights, and if it's 3 or more then we're also OK to continue and we return True. Otherwise, the dates include the holiday weekend and it's too short, so we need to tell them it's not a valid reservation and return False to not let them save the reservation.

Enter this for the Action expression:

```
IIFQ(DlgGetCtrlDate(1052) > {7/4/10} OR DlgGetCtrlDate(1068) < {7/2/10} OR  
Val(DlgGetCtrlText(1069)) >= 3, '.T.',  
'B(Eval(MessageBox("Error -- Holiday weekend reservations must be at least 3  
nights."), .F.))')
```

A few notes about the expression:

- It's broken into multiple lines for readability here, but it must be continuous (no line breaks) when you enter it. If copied from this text, you need to "delete" the line breaks after pasting it into the expression.
- IIFQ is used instead of IIF, because we don't want both of the result expressions to be evaluated (which would result in the error showing up no matter what).
- Every single punctuation mark and space is important. Study it very carefully if not using copy/paste. The braces around the dates are different than the parenthesis used in other places. Single-quotes are not the same as double-quotes.

6. We also need to check both of the boxes -- "Execute the action before..." and "Abort the operation...". Obviously we want to make sure this condition is met before actually saving the reservation, and if the How Heard is not filled in then we don't want to save the reservation yet.

7. Now just Save the element, and we're done with the customization for checking the How Heard field. Once you're all finished, just Save everything and try it out. Remember that if you entered the condition shown in step 4, it will still allow short holiday reservations unless you log in as a lower level operator.

If you need to check multiple dates, then it's best to add a separate element for each one (otherwise the logic gets complicated) Just use the Copy Element function to make copies of this one and change the dates in each one accordingly.

## Newsletter #39 (April 4, 2011)

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### What's New

#### **PCI compliance checklist**

For those who have upgraded to version 6, you now have a version that meets PCI compliance specifications, provided that you follow the PA-DSS Implementation Guide. Since the PA-DSS Implementation Guide can be difficult to understand, we have created a checklist of the specific things you need to do in Campground Master in order to be compliant. While some of the PCI compliance issues are handled automatically, others will require due diligence on your part to enable or maintain the functions needed to be in compliance.

The checklist can be found on our web site here:

<http://campgroundmaster.com/pci.html>

#### **A possible new option for Mac users**

We have heard that it's possible to run Campground Master on a Mac without installing Windows on a virtual machine (like Parallels), using "Crossover" software available from CodeWeavers.com. We are unable to confirm this, but if it does work then it's a much "lighter weight" alternative if you have no other need for Windows on your Mac computer.

To find out more, visit:

<http://codeweavers.com>

## **Q & A**

### **Shortcut for clicking "Done"**

**Q: Is there a way for the Enter key to finish a POS transaction, instead of having to click the "Done" button?**

A: Almost -- the combination **Ctrl-Enter** is a shortcut that will click the **Done**, **OK**, **Save**, or **Close** button of nearly any dialog in Campground Master.

You might also want to check here for other shortcut tips:

<http://campgroundmaster.com/help/keyboardshortcuts.html>

### **It's not changing the customer's credit card number**

**Q: I noticed that when customer gave a different credit card the program did not replace the old number under customer detail. Why not?**

A: If you're talking about the Guarantee info in Customer Details, then that's correct, it won't automatically change that if they use a different card for charges later, or if you change guarantee info in Reservation Details, since that's a separate record. The Guarantee info in Customer Details is considered historical information, and won't normally be used for future payments.

In fact, it's recommended that you set the Credit Card Security Settings so that the Guarantee Info credit card is removed once they check in (see Maintenance / Credit Card / Security Setup).

### **Changing the credit card in Guarantee Info**

**Q: How do I correct the Guarantee credit card information if put it in incorrectly?**

A: You can change it any time you want -- click the "..." button at the end of the Guarantee info, then click "Re-enter or Re-swipe" to clear the old info ("Redo swipe" in older versions). Now you can enter the new card.

### **Keeping it from running on startup**

**Q: How do I keep Campground Master from running on startup?**

A: You need to find the shortcut in Windows that's making it run on startup. This is typically through Start / Programs / Startup. Just delete the "Campground Master" shortcut in that folder to keep it from running on startup.

### **Printing invoices for today's check-outs**

**Q: Is there an easy way to print invoices for all of today's check-outs?**

A: On the **Departures** tab view, set both the From and To dates to be yesterday's date (the last night). Then right-click on any reservation, select **Print for all shown reservations / Reservation receipts or forms**. Select the receipt format you want to print and which transactions to include (usually "All"), and click **Print Receipts**.

## Easily blocking sites for multiple days

**Q: The option to block a site as unavailable for a day is handy, however, it would be convenient to be able to block a section of days, and block as unavailable all in one motion. Right now, I have to block each day individually.**

A: You can enter a date range to lock them all at once -- right-click the site and go to Site Details, and add the range of dates in the "Special Dates Unavailable". If there are already dates there that you still need blocked, then be sure to use a comma to separate the date ranges as shown in the example on the dialog. While you're there, you could remove any past dates from that field to make things more efficient.

## Reporting average daily rate

**Q: How can I get a report showing the average daily rate collected?**

A: There's a sample query that might help, but it has some limitations. It reports average amount paid per night, by site type and date.

1. Go to Maintenance / Advanced Customizations / Queries
2. Click the Import Query button, and you'll get a typical Windows file-open dialog labeled "Import Query".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top).
4. Now select the file "**Sample Query - Average daily amt paid, by site type.csv**", and click Open. You'll see one or more queries added to the list. When done importing, click Close.

Now that query will be added to the Query tab view (that tab will be newly added in front of the Transactions tab if you didn't have any Queries before this). Just go to the Queries tab and select it from the list.

It's not perfect, but that's the closest we can come at the moment. Note that the numbers in the central grid are NOT accurate (they're intermediate totals) -- only look at the last "Average" column and bottom "Average" row. Also note that it reports as of each reservation's Last Night - e.g. if they stayed 5 nights, the average will show up only on the last night, not each night separately. Also, for linked reservations the combined total will all appear on the master site, since the transactions are combined.

## Tips & Techniques

### Cleaning up inventory "on-hand"

For Point of Sale users...

We see a lot of databases where inventory items show a negative value quantity on hand. This is likely happening for items where you don't really care to track an accurate inventory, which is fine. However, we recommend that you CLEAR the "Quantity on hand" value for any items like this. The field must be empty, not "0", so it knows that there is no need to update the quantity (as opposed to an actual quantity of 0 on hand). This will prevent unnecessary audit trail entries, reduce sync errors, and generally make things run smoother.

Therefore I suggest you go through your Inventory Items and clear this field for any that you don't need to track the quantity of -- or at least ones that you use frequently (which probably show large negative quantities on hand right now).

## Changing Rates but grandfathering current reservations

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<https://campgroundmaster.com/help/overview32.html>

Lets say you need to change some of your rates, but you don't want them affect anyone who has made a reservation already (you've promised them a certain rate), even though they haven't checked in yet. In other words, the rate change is based on when the reservation was made, not when they check in.

In older versions, the only way to do that (and have it work for Auto-Rates) was to set up a separate Reservation Type, where all new reservations get a different type. However the newer versions have a way to do this with the Advanced Condition Expression in the Rate definition. While this is "advanced", which means it gets into programming, handling this particular condition is relatively simple.

1. Make another copy of each rate that's changing (click on the rate and click "Copy Rate" -- the new copy will be at the bottom).
2. Adjust the charge amounts and descriptions ("Edit Rate").
3. Move each new rate so it's above the original rate.
4. Set up the Advanced Condition Expression to check the date-made field accordingly for each rate:

For instance if the cut-off for the new rate was April 1st 2011, the expression in the new rate would be (assuming U.S. date format):

```
Resv:Resv_Date_Made >= {4/1/11}
```

In the old rate it would be:

```
Resv:Resv_Date_Made < {4/1/11}
```

Make sure the format is precisely copied, every character counts. Be sure to use the curly braces around the date as shown. Also be sure that one and only one of the expressions includes the "=", otherwise any reservations made exactly on that date would not uniquely match either rate.

This will enable Auto-Rates to select either the old rate or the new rate depending on when the reservation was made.

Note however that it won't show the correct rate in Check Rates (because the temporary reservation doesn't have a Date\_Made yet) unless you put the Old rate first -- or you can change the expression for the New rate to be:

```
FieldIsBlank(Resv(), "Resv_Date_Made") OR Resv:Resv_Date_Made >= {4/1/11}
```

This assumes of course that the date for the new pricing is today or in the past, not in the future, since it assumes any new reservations get the new rate.

## Newsletter #40 (April 21, 2013)

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### What's New

#### IC Verify issues

There have been some major issues with the recent versions of IC Verify (4.1 and 4.2) which are unrelated to Campground Master. Due to these issues, detailed below, we officially consider IC Verify 4.1 and later to not be supported by Campground Master. While it is possible to get it to work, we are not responsible for getting it to work and consider it not compatible. If you call about getting it to work, we will refer you to this information which might help you, but cannot provide any other support for it.

If you already attempted to upgrade your IC Verify, you may already know about this. For those who have not yet upgraded, or who are considering using IC Verify for credit card integration, this simple answer is -- **don't!**

Here are some things you need to know:

1. If you can still use a previous version (e.g. 4.0.3 or 4.0.4), then we suggest you do so. They claim that it won't work with Windows 7 and will try to get you to buy version 4.2, but we've seen the old version work successfully on Windows 7 in at least one case. The problem is that they won't want to support you with that combination so you may be on your own with installation, and we can't guarantee that it will work.
2. If you upgrade from a previous version of IC Verify (from 4.0.3 to version 4.2, for instance), expect problems. Their installation doesn't properly re-register new components needed for the integration with programs like Campground Master. Most of their support staff does not know about this. They will require you to buy level 2 support for \$750 in order to fix it, since it only affects the integration with other software like ours. Expect 3 to 4 hours on the phone with them before they figure it out, if you're lucky.
3. If you're using Windows 7 with IPv6 enabled (as almost all installations of Windows 7 will), the IC Verify integration with won't work. As with #2 above, most of their support is unaware of this and level 2 support is required to fix it.

4. Assuming the above issues are solved or are not a problem, you need to run Campground Master as an administrator the first time you try to connect with IC Verify so it can properly register the ICVerify DLL (Campground Master will offer to register the DLL if it sees that it isn't registered, because their setup doesn't do it for you). This means you should right-click on the Campground Master icon on the desktop and choose "Run as Administrator", assuming that's an option. If it's not an option, then either you're not logged into Windows as an administrator or you're using an older version of Windows (e.g. XP) where this isn't an issue.

4a. It's also possible that the IC Verify Multi-user component needs to Run as Administrator at least once, but we have not confirmed this.

5. If IC Verify is ever uninstalled and re-installed in the process of trying to get it working, you need to unregister and re-register the IC Verify DLL that Campground Master uses. Preferably, unregister it before doing the re-install of IC Verify. There is a convenient Unregister button on the Credit Card Processing Setup screen of Campground Master, since IC Verify doesn't do it for you. Once IC Verify is re-installed, Campground Master will again need to be run as an administrator so it can register the DLL (see #4 above).

6. Even if you get the integration working, their response codes and the documentation for them leave a lot to be desired, and sometimes an authorization comes through as "no error" when it really isn't processed, or it indicates an error when it really did process. We made some corrections for this in version 6.1.4, but there are probably still some cases that don't work correctly, especially for non-U.S. credit cards, so watch the response messages carefully -- there is usually text in the response indicating the real result.

IC Verify's support will try to insist that the integration problems are a Campground Master issue, which they are not. For the installations that we've gotten to work (after hours of back and forth with their level 2 techs), it has always been proven to be an IC Verify problem. This can be shown by looking at the IC Verify log files for the Transaction Client/Server components that do the encryption (see details below), which they require 3rd party software like Campground Master to use.

Due to these problems, we cannot provide support for IC Verify integration of 4.1 or 4.2 versions. When it works, it works well (except for #6 above). But since almost all installations run into these problems and the issues are with IC Verify, not Campground Master, you will be responsible for purchasing their level 2 support and working with them to get it to work.

So what do we recommend? Get rid of IC Verify and use [one of our other options](#) instead.

### **Solving the problems if you really want to try:**

If you really want to try to get it to work, here is some further information that may help.

There are generally 4 possible errors seen:

-- A time-out waiting for a response from IC Verify -- This is good news, since it means that the encryption went smoothly and it's a simple matter of the path in the IC Verify Multi-User not matching the path in Campground Master, or the Multi-User not running.

-- An error saying that the IC Verify DLL isn't registered (with an option to have Campground Master register it)  
-- This is expected the first time you try to run a card. If it happens again, then see #4 and #5 above

-- An error saying that encryption failed, a blank response was received from IC Verify -- This is the big one causing all of the issues, and requires level 2 support from IC Verify..

Here is some further information about the issue, which might be able to help their techs fix the problems:

To find out where it's really failing, you need to have ICVerify look at their log files (ICVTnsClient logs under the Campground Master folder in Program Files, and the ICVTnsServer logs under the ICVerify folder)



What Campground Master does: Before putting the file in the folder, Campground Master must call ICVerify to encrypt it. It passes the information to the ICVTnsClient.dll, which in turn sends this to the ICVTnsServer service (which in turn calls the IC Verify EncryptionManager.dll). Once ICVTnsClient gets a response from the ICVTnsServer, it gives that response to Campground Master so it can put the encrypted information in a file. From there, the IC Verify Multi-user picks it up, processes it, puts a response file back, and Campground Master must go through the same process to decrypt it.

You should be able to see from the log files whether failing in ICVTnsClient (it gets the request from Campground Master but the Server never gets the connection from the client), or ICVTnsServer (it gets the connection from the client, but can't open the EncryptionManager DLL). The first problem is likely due to IPv6 being enabled in Windows. The 2nd problem is most likely due to an IC Verify upgrade not properly registering its components. Of course there may be other problems we're not yet aware of.

Good luck!

## **Q & A**

### **Making the text larger on the screen**

*(Revised for version 8.0 and later)*

**Q: How can I make the font larger? The small size is tough on my eyes.**

A: There are settings for Font Size under Maintenance / Program Options / Formats.

While the size of some parts of the program change automatically with Windows settings, like the dialogs and menus, the font used for controls in tab view and grids is defined in the program. The normal size is considered a size of 12 (don't worry about what this number actually means). You can increase the size to a higher number if needed to see the text better on your computer. A small increase to 13 or 14 may be all that's needed. There are 3 different areas that can be independently changed:

**Tab view controls** -- this is for the row of controls above the main grids in the Tab views, e.g. the From & To date selections, Reset/Today button, etc.

**Tab view grids** -- this is for the main grids in the Tab views themselves, e.g. the Rack, Arrivals, Departures, etc.

**Other grids (in dialogs)** -- this is for grids used inside dialogs, e.g. Find Reservation and other reports that open a new window.

Alternatively, you may want to make everything bigger on your computer, which will also affect Campground Master. Experiment with the Display settings/properties through Windows -- try changing the "DPI" settings, or change it to "Large Fonts", or as a last resort, lower the Screen Resolution (note that this would also affect the area available for a Map).

The specific way to get to these settings varies depending on the Windows version you're using, but start by right-clicking on your desktop (a blank area) and select "Properties" or "Personalize".

Note also that if you've done any customizations to dialogs (through Advanced Customizations), then changing the font settings could affect the arrangement of any new controls added to the dialogs (since the pixel locations of the standard controls will change).

## Reporting reservations by date made, this year vs last year

**Q: Is there a way I can compare reservations taken in so far this year to reservations taken up to this point last year?**

A: You can get a list of reservations by date made -- see Reservations / Reservations by Date Made. Then you can set the date range for this year or last year.

You can also use Reports / How-Heard report to get a summary of the number made by day, month, etc. In that report, check the box to Report by Date-made. You can also use Reservation Filtering within that report to limit it to reservations that arrive during a given time period.

## Why are checked-out reservations disappearing?

**Q: Why are checked-out reservations disappearing from the Rack?**

A: There is an option under Maintenance / Program Options / Reservations that has been checked. You need to uncheck "Remove checked-out reservations from the Rack (make available for extra check-in same day)". Now all checked-out reservations will re-appear on the Rack.

So why enable this option? It can be useful to clear reservations from the Rack immediately, e.g. if someone checks in and then leaves the same day, then the only way to make the site "available" that day for a later check-in is to enable that option. (If they were there overnight then you could always change the Last Night to the previous day, but that's not possible if they checked in and checked out on the same day.)

## Where is the Bulk Check-out function?

**Q: How do I do a bulk check-out?**

A: This function was added in version 6, but it's easy to miss. It's called "Auto-Checkout today's departures", and it's only available on the Departures tab right-click menu.

From the documentation:

### Auto-Checkout today's departures

This function can be found on the right-click menu of the Departures tab view. Selecting this option will check out all reservations currently checked in with a last night equal to yesterday's date (i.e. departing today), provided that their Paid-thru Date is set to their Last Night and they have a \$0 reservation balance. If the reservation has any Guest reservations, they must also have a \$0 balance and be due out today or earlier, and the Guests will be automatically checked out also.

If you want to check out more than just yesterday's departures, then additional functions were added in version 11. See this article for details:  
How To Check Out Reservations in Bulk

## Splitting deposits among group members

**Q: Is there an easy way to split deposits among group members automatically?**

A: It's easy to miss, but there is a function to auto-split the deposit **at the time you enter the deposit**. This requires that the sites (reservations) be linked as Non-Synchronized at the time, so you need to make the group reservations as non-synced to start with. From the documentation (under Handling Transactions / Deposits):

#### Splitting the deposit among multiple reservations

If the reservation is linked to other non-synchronized reservations (for separate billing), then a special Split payment among group members option will be present when entering the deposit. (This option appears as a checkbox next to the "Amount of deposit" entry field.) For instance, if one person is making a deposit for a group of 4 parties, select this option to automatically split the deposit (transfer 1/4 of it to each of the other 3 reservations). This adds all of the appropriate "Deposit Transfer" transactions, saving you the trouble of doing the transfers manually.

### **Reporting revenue by Site**

#### **Q: How can I report the revenue for each site?**

A: Assuming you want it cash-based, i.e. when payment was received:

Start with the Transaction report "Receipts by Payment Method" (Receipts by Category will NOT work). Then click on the Summary Options button, and change the "Group total for each" to Site. Change the Summarize period to Monthly if you like. Click OK and that should be it (change the From/To dates accordingly).

Note: If you enter advanced Deposits, they will be shown on the date the deposit was entered. If you want the report to reflect the actual date of the stay rather than when the money was received, click on "More Filters" and check the box to "Use reservation date instead of transaction date". This will report all revenue as of the First Night of each reservation.

### **Reporting all advanced deposits**

#### **Q: How do I get a report of all advanced Deposits for future reservations?**

A: You can do this from the Arrivals tab view. Add the "Deposits" field if needed (through the Options on that tab), and put in a date range that would be far enough to include all future reservations made.

Warning: Don't add the "Auto-Charges" or "Auto-Balance" fields unless absolutely necessary, and assuming you have auto-rates set up correctly. This can result in an apparent lock-up of the program if it takes a long time to calculate the rates for all reservations shown.

### **Tips & Techniques**

#### **Reporting balances as of a certain date**

If you want to report all reservations with a balance as of a certain past date, and assuming they still currently have a balance, there is a tricky short-cut for this. (There is also a sample Query you can import, but that's a more complex option -- see below).

Go to the Payments Due tab, and under the Options, enable the "Current" field for Aged Balances Due. Now the "Current" column will show the balance as of whatever date you enter for the date ("Show any due as of"). Also check the box "Show all with balances".

Note that it will normally show the Reservation balance, but if you check the box "Use Customer balance" under Options, then it will show the Customer balance - but of course this can result in duplications if they have multiple reservations.

As mentioned, this will only show reservations that will normally show under Payments Due, according to the other Options set -- any with current balances, or pending with no deposit, etc... If you need to comprehensive report for As-Of balances regardless of their current status, you can import the sample query that does this.

1. Go to Maintenance / Advanced Customizations / Queries
2. Click the Import Query button, and you'll get a typical Windows file-open dialog labeled "Import Query".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top").
4. Now select the appropriate file, for instance "Sample Query - Balances Due as-of a date", and click Open. You'll see one or more queries added to the list. When done importing, click Close.

Now that query will be added to the Query tab view (that tab will be newly added in front of the Transactions tab if you didn't have any Queries before this). Just go to the Queries tab and select it from the list.

## Entering a new credit card for a customer

Sometimes we get a question about entering a new credit card for a customer, usually for long-term residents. The first attempt usually involves entering it under the Customer Details / Guarantee Info. However this doesn't necessarily work. Here's why:

When you make a new payment, it looks for a previous card in a specific order:

- First it looks at previous transactions for the Reservation and will use the last card from the most recent reservation payments made by credit card.
- If no cards are found in reservation transactions, then it will look at Customer transactions (e.g. from other reservations, or done on just the Customer).
- If still no card is found, then it will check the Reservation's Guarantee info, under Reservation Details. (This is assumed to only be useful when they first make the reservation and have no transactions yet.)
- Finally it will check the Customer's Guarantee info (this is assumed to be oldest, e.g. left over from prior reservations).

So if you're entering the new card under Customer Details, that's going to be the last place it looks.

While there isn't a specific field for holding credit card information "on file" for a customer, there is a workaround way of doing it if you don't mind losing all of the old information (and the ability to do a refund to the customer's previous card). You can put the new credit card information in the Customer's Guarantee Info (on the Customer record, not the Reservation record). This also involves changing the security settings to a minimal level. In my opinion this is not a good idea -- I would just make the customer produce the credit card the next time they need to make a payment. However if you want to do it, here are the steps.

First go to Maintenance / Credit Cards / Security Setup, and uncheck (disable) all of the options for removing guarantee info, and also uncheck the option to not retrieve card information from previous transactions or Guarantee info, and uncheck the option to limit retrieval to the current reservation's transactions. If you're

using at least version 6.0, this should leave all boxes unchecked. Note: If you're using a version prior to version 6, there are other security options noted for PCI compliance. Do NOT disable those options.

Next, go to Maintenance / Credit Cards / Remove a customer's credit card info. Find the customer in question and have it remove all past card information.

Finally, go to Customer Details for that customer, click on the "..." button at the end of the Guarantee Info line, and enter the new card information.

## Changing vehicle field labels

While it's not obvious, it is possible to change the labels for the vehicle fields on the dialogs and on the Ticket Form receipt, e.g. "Rig", "Car 1", "Model", "Color", etc. This can be useful if you're a marina instead of a campground, for instance.

Some of the field labels can be changed in Data Field Definitions, which you may have already tried. But because the dialogs and the Ticket Form receipt don't show the separate labels for each vehicle field, the rest require special handling. We have set it up so they can be changed through the Settings table.

Go to Maintenance / Raw Data Tables / Park Setup / Settings.

Sort the Section column (click on the header) to make it easy to find the entries in the "Vehicles" section.

Locate those settings and edit the "Value" as needed. (Don't forget to check the "Allow editing of fields" box). The Key gives you some clue as to what each value is used for. The ones that start with "Ticket" are for the printed Ticket Form, and the ones that start with "Search" are for the Find Customer selection list. The "MoreButton" and "MoreTitle" entries are for the button in Customer Details and the title of the more-vehicles entry dialog.

## Receipts by Category report changing previous values

The Receipts by Category report is a "calculated" report rather than just summarizing raw transactions, so it's particularly sensitive to the way data is entered, and especially to changes made to the data. This is one reason it's important to do everything you can to keep from altering "prior" transactions. For one thing, make sure most operators log in with an access level of Reservations, not Administrator, so they can't alter old transactions.

The report is mainly sensitive to the order of transactions, particularly the position of the Payments vs. the Charges. If you manually allocate categories for a payment then that can affect any following payments also, e.g. if a later payment does not have manual allocations then it will try to "fix" the allocations to make them add up correctly. This kind of thing has already been covered in the normal documentation under Dynamic Interactive Report Screens / Transactions / [Receipts by Category](#), so you should first read that if you have any questions about the "normal" operation of this report.

So what if you print the report once, and then later notice that values have changed for the same date periods you printed earlier?

The categories for a given Payment cannot be affected by a transaction that's below it in the history for that reservation or customer, so if amounts in the reports are changing on previous dates, that could be a result of one of these things:

- Transactions being deleted (or values changed)
- Transactions being moved up or down through a reservation's Transaction History
- Category allocations manually changed in previous payments
- Transaction Categories deleted from the Pick List

Outside of operator intervention, there are a couple other possibilities:

- Bad links or orphaned transactions -- go to Maintenance / Database Maintenance, and do each of the "Report and repair" functions to fix orphans and Repair bad links.

- Network synchronization issues -- see if the report differs on separate computers. This usually results from orphaned transactions. Make sure the Master computer is all fixed up using the steps above, then on each of the other computers do a Maintenance / Network Functions / Request a full database refresh (one at a time, giving it time to complete before doing the next one).

Finally, if you upgraded the program since you ran the prior reports, then the new reports may be different due to fixes in the report calculations.

### Showing Yes/No on a Query instead of .T./F.

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<https://campgroundmaster.com/help/overview32.html>

Here's a quick tip if you're experimenting with Queries (Advanced Customizations).

If you've added a "boolean" field, you've noticed that the default values show as ".T." and ".F." (which means True and False). Most likely you would prefer that it show something like "Yes and "No". In order to do this, you need to make a change to the Expression.

Whatever it has for the expression, you just need to put that inside an IIF() expression that results in Yes or No.

For instance, instead of:

```
Campsites:Site_Inactive
```

...change it to:

```
iif(Campsites:Site_Inactive,"Yes","No")
```

(Note that it's **iif** with an extra "i", not the word **if**.)

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## Newsletter #41 (May 26, 2014)

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## **What's New**

### **FTP issues with Windows upgrades**

If you use the "Export to web vacancy grid" function to upload pages to your web site, then you may have had an issue with this suddenly not working. This can happen when Windows does an upgrade, or if you upgrade to Windows 8. We've had a few reports that FTP stops working (for many programs) if Internet Explorer (MSIE) 11 is installed (this is part of the Windows automatic updates, for instance). One solution is to Uninstall MSIE 11 and go back to MSIE 10. We have also heard that there's a newer MSIE update that fixes the issue, so also make sure that you've done all Windows updates.

Windows 8 apparently comes with MSIE 11, and it can't be removed or reverted to MSIE 10. However getting up to date with the Windows updates should fix it.

## **Q & A**

### **Keeping it from logging off every 15 minutes**

**Q: How can I keep it from automatically logging me out every 15 minutes?**

A: Each operator has an auto-logout time. It's recommended that you keep this in place if you have more than one person using the computer, to help keep track of who did what. This is especially important if you enter credit cards in Campground Master (you're violating PCI Compliance rules otherwise). If you want to change the time-out, go to Maintenance / Park Setup / Operators (of course you need to be an Administrator to do this), and Edit each operator as needed to change the "Auto-Logout after" field. To disable the auto-logout entirely for an operator, clear the field.

### **Fixing messed-up Reservation Splits**

**Q: I split a reservation like I have many times with no problem, but this time his entire Transaction History disappeared! Both accounts are blank. Can you please help me?**

A: Sometimes things can get really confusing when a split is done wrong or you're trying to correct something and end up with reservations and transactions where you don't want them. The best way to fix it is to try to get back to one reservation with the transactions, regardless of whether it's on the right site or dates, and start again.

The first step is to go into Customer Details, and click on Reservation History. Look at each one that could be part of what you've been working on (based on the sites/dates involved before or after the split), and see if you can find the one with the transactions on it (it may have a balance, or you may have to view on each one and look at its Transactions). If you see more than one that "appears" to have the same transactions, then they are part of a sub-member group -- make sure you know which one is the "Linked master", which will be indicated in the "Linked Reservations" field.

Once you have found the one with the original transactions, Delete any others that might have been done wrong (e.g. on the same site/dates as the original or the post-split action), and then start over with the one that has the transactions. You need to be an Administrator to use the Delete button in Reservation Details, but this is recommended to clean up the mess and avoid confusion. Depending on the situation, you may have to force the remaining reservation back on the original site & dates -- first fix the dates (possibly requiring you to change it back to Pending first), and then put it back on the original site. Then you should be able to see it back on the Rack in the right place and then you can try the Split again.

Note: A newer article exists with more detailed information:  
Fixing Reservations Split/Linked incorrectly

## Do you have online backup?

### Q: Do you have an online backup function to save the database in the cloud?

A: We don't provide our own online backup. If you want this ability, we recommend using an online backup of your choice (e.g. DropBox), and making a backup daily (from the Backup function in the program) into a folder that's automatically backed up online. If your online backup service allows you to select a folder for automatically back up or mirror online, we strongly advise **against** setting it to mirror or back up the Campground Master data folder directly, as this data changes too often and can result in file sharing problems, not to mention significant bandwidth use. Also, if using a file sharing service like DropBox which has its own folder that's mirrored online, do not make that the default database location for Campground Master. In addition to the problems mentioned above, this can cause significant database corruption if someone else accesses the DropBox folder from another computer.

## Renaming / re-using numeric reservation fields

### Q: I need to charge some reservations for a quantity, like we do the # adults. Can we rename one of the fields we don't use for this?

A: Yes, you can rename one of the numeric fields you don't use, like # pets, # extra vehicles or # trailers, and use it for add-on charges just like # adults. Be sure to rename both the Customer field and the Reservation field of the same name, since they act together. See the documentation here:  
<http://campgroundmaster.com/help/definedatafields.html>

If you don't have a spare numeric field available then you could add a new numeric field to the Reservation fields and use that in a Rate definition as well, but to add that to a dialog for entering the data gets into Advanced Customizations. See the article on adding fields to dialogs here for an idea of what's involved:  
<http://campgroundmaster.com/help/addingnewfieldstothecusto.html>



## Rates to charge extra for 1 adult and 2 children

**Q: We charge for more than 2 people, but the cost is different for extra children vs. extra adults so I can't use the normal method of just setting the reservation field to "# Children + # Adults". I'm having trouble doing the rate if they have 1 adult and 2 or more children....if 2 or more adults, it's fine. But for 1 adult and 2 children, how can I get it to only charge for the 1 extra child, not both?**

A: You can do it by having 2 separate rates for extra children -- one that applies if there's 1 adult and another for 2 or more adults. The trick to that is to use the Advanced Condition Expression.

In the extra child rate for 1-adult, set the Advanced Condition to:

Resv:Resv\_Adult = 1

and set the "Applies if Resv field" to:

# Children >= 2 per each more than 1

In the extra child rate for 2 or more adults, set the Advanced Condition to:

Resv:Resv\_Adult > 1

and set the "Applies if Resv field" to:

# Children >= 1 per each more than 0

The Extra Adults rate would be done the normal way (# Adults >= 3 per each more than 2), nothing special about it.

A similar method would be used if you allow 4 people, e.g. 2 adults + up to 2 children, or 1 adult + up to 3 children. Again, this is only necessary if you charge different amounts for extra children than you do extra adults (if the price is the same for adults and children, you can just use one rate with "# Children + # Adults" >= 5).

This first example assumes that you charge for more than 2 adults even if there are no children. In other words, you include 1 adult plus 3 children at no cost, or 2 adults plus 2 children. Any more than 2 adults (or more than 4 total people) gets added charges.

You'll need 5 separate rate definitions. Two of them will need "Advanced conditions", as above.

1. Extra adults : just the standard Extra adults rate, # Adults >= 3 per each more than 2.
2. Extra children if 1 adult : Set it to # Children >= 4 per each more than 3. In the Advanced condition, put:  
Resv:Resv\_Adult = 1
3. Extra children if 2 adults : Set it to # Children >= 3 per each more than 2. In the Advanced condition, put:  
Resv:Resv\_Adult = 2
4. Extra children if 3 adults : Set it to # Children >= 2 per each more than 1. In the Advanced condition, put:  
Resv:Resv\_Adult = 3
5. Extra children if 4+ adults : Set it to # Children >= 1 per each more than 0. In the Advanced condition, put:  
Resv:Resv\_Adult > 3

Now if you allow 4 people whether Adults or Children, then the Extra Children rates are the same as #2 through #5 above, there's only one difference in the first rate (Extra adults:)

1. Extra adults : just the standard Extra adults rate, # Adults >= 5 per each more than 4.

(and rates 2 through 5 the same as above)

## Fixing the order of transactions

**Q: When entering payments, e.g. if an error is made and we have to re-enter one, is there any way to automatically organize the payments into date order?**

A: In order to fix the order of the transactions, start with Reservation Details. Click on Transaction History, and there you can select the transaction and use the Move Up or Move Down button to get it in the right order. Note that having the Payment before any Charges that it's paying for is important for the Receipts by Category report, to avoid uncategorized amounts. See the documentation here for more details:  
<http://campgroundmaster.com/help/receiptsbycategory.html>

## Entering split payments (2 different payment methods)

**Q: How do I enter a split payment, e.g. paying part with cash and part with credit card?**

A: This is easier than you might think. Just click on Payment to enter the first payment, select the payment method, and before you save it change the "Amount to pay" (or "Amount of check") to the amount being paid with that method. Save that (you may see a warning about the paid-through date since it's not paid in full, just click No to continue), and then click on Payment again to enter the 2nd payment method.

## Having 2 different check-in or check-out times

**Q: We have some sites with a different check-in and check-out time. Since that's set in one place, through Maintenance / Park Setup / Parks, how can I have different times?**

**UPDATE:** Version 10.0 added a new feature to make this easier, so you can use that instead of the old method explained below. See the new article:  
<https://campgroundmaster.com/news/different-check-in-and-check-o.html>

However the original method below will still work if you have more specific needs or don't have version 10.0 yet:

**A:** If you have multiple Parks records then they can have separate check-in and/or check-out times. In Maintenance / Park Setup / Parks, Add another park record. Make sure to copy all of the Park Name and address fields exactly, so the Key Code matches the first park record, and also copy the Authorization Code, but change the "Short name" for identification purposes (e.g. "Cabins"). Then set the check in/out times accordingly. Finally, go to the Sites setup (Park Setup / Sites) and select the appropriate Park for each site that has the different times so it's part of the new "park". This won't affect reporting - unless you specifically select one Park in the filtering, both parks will be reported as one.

## Discounts not adjusting taxes

**Q: When I add a manual discount, why isn't it subtracting the taxes also?**

A: When you manually add the Discount (e.g. using the "Discount" button), you need to make sure the correct "Auto-Add tax" box is checked (on the screen where you enter the amount of the discount). Also, it's probably a good idea to make sure the correct Category is selected for the discount, so it comes out of the appropriate account instead of a generic "Discount" account. If you have the Default tax categories set up appropriately (under Park Setup / Taxes), then when you select the category then it will automatically select the appropriate auto-add tax also.

## Reporting the number of people in the park

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<https://campgroundmaster.com/help/overview32.html>

### Q: How do I get a report of the number of people in the park each day (total adults + children), rather than the number of reservations as shown in the Occupancy report?

A: There is a sample Query you can import that does this. We haven't included it as a standard report because not everyone uses the same fields for # of people -- some have added extra fields for other categories like seniors, or changed # Children to something else like # slide-outs. So it would get complicated to add enough options to make it work right for everyone. But of course this is why we have things like the custom Queries.

1. Go to Maintenance / Advanced Customizations / Queries
2. Click the Import Query button, and you'll get a typical Windows file-open dialog labeled "Import Query".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top").
4. Now select the appropriate file, for instance "Sample Query - Occupancy (# people) by Site Type", and click Open. Note that there are several samples you can import for Occupancy (# people), depending on how you want it grouped. You'll see one or more queries added to the list. When done importing, click Close.
5. Changing fields if needed: As mentioned above, not everyone uses the same fields to mean "# of people". This sample assumes that you do use the most common fields, # Adults and # Children. If you need to change this, it can be done but takes some care. First select the query and click Edit Query. In the Calculated Data Expression, you'll see:

```
LoopSum(1, ThisListCount(), "#i#", 'FieldValue(ThisListRec(#i#), "Resv_Adult") +  
FieldValue(ThisListRec(#i#), "Resv_Children")')
```

You should be able to see where this adds the values of the fields Resv\_Adult and Resv\_Children (the internal Field ID's for # Adults and # Children). You can change the fields used, add more fields to the equation, or remove one of them if needed. To change the field, you need to know the Field ID of the field you want to use, from the Data Field Definitions for Reservations.

6. Change the data grouping if needed: This sample reports daily totals. You can change it to Monthly, Quarterly or Yearly easily. First select the query and click Edit Query (if not already done in step 5). Under Axis Name, click on the Date line, and Edit Axis Grouping. Select the new Date Grouping from the drop-down list, and then click Save.
7. If you changed fields or grouping above, then change the Query Name and the Notes fields appropriately. If desired, you can also change the Access Level.
8. Click Save & Close all the way out.

Now the query will be added to the Query tab view (that tab will be newly added in front of the Transactions tab if you didn't have any Queries before this). Just go to the Queries tab and select it from the list.

## Tips & Techniques

### Finding outstanding Security Deposits

Assuming you use the recommended method for handling security deposits (e.g. for electric deposit, key deposit, etc), i.e. you use Charge transactions with a category of Security Deposit, here's how you can find out if someone has a security deposit outstanding:

Start with the Transactions detail report. If you're not sure how to get back to that after using a summary report, see here:

<http://campgroundmaster.com/news/gettingbacktothetransactio.html>

Then filter it --

- click More Filters, select the Security Deposit category.
- You may want to include only checked-in reservations, so go to Site/Reservation filtering (from More Filters), and select only "Checked In" under the Status filter. However if you take security deposits even before they check in, then also select Pending, Confirmed, and Guaranteed.
- Select an appropriate date range, e.g. far back enough to include deposits from the oldest current reservation.

OK / Close the filter dialogs to get back to the main screen. That should show all security deposit charges, both adding and subtracting. If the total at the bottom is not \$0, then you have one or more that did not balance out, which should mean an outstanding deposit. You should then sort by Site (click the header), so any refunded security deposits would be next to the original charge, and it will sub-total \$0 for the site if they balance. So any non-zero subtotals will indicate an outstanding deposit.

You can make it even easier to find them by going to Summary options now, select Group total for each: "Site", and Summarize period: "None". Click OK and you have a neat list of sites and any with outstanding balances will be obvious. You can go back to Summary Options and Save the report under memorized reports so you don't have to do all of this every time.

Update: If you want a "fancier" solution using a Query, which can be brought up quickly when needed instead of going through all of the steps above, you may want to try the Advanced Customizations solution to finding unmatched security deposits:

<https://campgroundmaster.com/help/reporting-unmatched-security-d.html>

### Automatic Backup each day to a new location

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<https://campgroundmaster.com/help/overview32.html>

**UPDATE:** Version 10.0 added a "Secondary backup path" feature, so you can use that instead of the old method explained below. See the new article:  
<https://campgroundmaster.com/news/secondary-auto-backup-location.html>

However the original method below will still work if you have more specific needs or don't have version 10.0 yet:

We're often asked if the automatic backup can be made to some location other than the database folder. The standard auto-backup can't be changed, but you can add a 2nd auto-backup function through Advanced Customizations. It's a very simple customization, which is why we haven't bothered to add a specific option for it in the standard program.

Disclaimer: As with all Advanced Customizations, this is programming and must be done precisely or the results can be unpredictable. Normal support does not include help with getting Advanced Customizations to work beyond what is in this article and the system documentation.

1. To add this feature, go to Maintenance / Advanced Customizations / Event Actions.
2. Click Add Event Action.
3. Enter an Action Name, like "Backup each day".
4. For the Event Trigger, select "Each Hour".
5. For the Condition, enter the following (all in one line -- if this shows it as multiple lines, enter it continuously without pressing Enter).

```
Hour(DateTime()) = 5 AND Workstation() = 0
```

Note: Spacing is critical, it must be typed EXACTLY as shown, for instance with spaces on each side of the AND's and the operators (=), but no spaces anywhere else.

This will make it back up each day at 5AM -- change the value if you prefer a different time (from 0, which is midnight, to 23, which is 11PM). It also sets it to only back up Workstation 0. This keeps it from happening on all computers at once if you have networked computers.

6. For the Action expression, enter:

```
BackupDatabase("C:\\CM Backup " + FormatDateTime("%Y-%m-%d", Today()) + ".zip")
```

This will put it on the root of C:, with the file name including the date, formatted as "CM Backup YYYY-MM-DD.zip" If you need it a different location, you can enter the path accordingly -- but don't forget to double up the backslashes in the path as shown (a text formatting requirement as described in the documentation).

You can change the path to put it anywhere you want. For instance you can have it back up to your DropBox account by using the Dropbox folder (so the Dropbox synchronization will upload it automatically). To find out what your Dropbox folder is, you need to check your Dropbox settings. This may help:

<https://www.dropbox.com/help/desktop-web/locate-dropbox-folder>

Again, don't forget to double up the backslashes in the path (e.g. "C:\\users\\dropbox\\" instead of just "c:\\users\\dropbox\\")

7. Click Save, then Close to exit Event Actions Setup.

Note that this event is only checked each hour, and only after all dialogs are closed. So it will happen the first time dialogs are closed between 5AM and 5:59AM.

## Adding a "Print CC Slip" button to Transactions

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<https://campgroundmaster.com/help/overview32.html>

Certain commands can be activated through functions in the Advanced Customizations, and one of those is printing a Form. So we can use that function to print a credit card slip (or any selected Form) when the user clicks a button. In this example, we'll add a button to the Reservation Transactions dialog that prints the Credit Card Slip. This can be used to manually print an extra copy of the cc slip, either because the automatically printed one got messed up, or because we want to wait and print a 2nd one after we've torn off the first one that's auto-printed (rather than printing both copies at once and having to tear them apart afterwards).

1. The first step is to add a Dialog definition that's an Add-on to the Reservation Transactions dialog. Go to Maintenance / Advanced Customizations / Dialogs, and click "Add dialog definition".

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition then you would just add elements on to the existing one instead of creating a new one here (in which case, skip to step 3).

2. Give it a name, such as "Resv Transactions add-on". Then check the "Add-on" box and select "Reservation Transactions" from the list. Also make sure the "Enabled" box is checked.

3. Click Add Element. Set the fields as follows:

Element Type: Add New Control  
Control Name: cc button  
Control Type: Button  
Left: 200  
Top: 440  
Width: 90  
Height: 18

4. Click Edit Action Expr..., and enter this for the expression:

```
PrintFormForRecord("Credit Card Slip, fixed-pitch font", ThisResv(), .T., .T.)
```

Note: Spacing, capitalization, and punctuation are critical, it must be typed EXACTLY as shown.

This will print the Form with that name -- if you use a different form for cc slips, enter that name instead but make sure the name is exact.

The last 2 parameters of ".T." tell it to show a preview and then show a Print dialog (so you can cancel it, etc). Once you've tested the functionality, you could change those to ".F." (false) so it just prints it immediately with no extra steps involved.

5. Click Save and then Save again to get back to Edit Dialog Definition.

OK, now you're ready to test it. Click "Save & Test dialog" to see what it looks like. It will use the most recent reservation added for the test, so if that reservation has no credit card transactions then the slip itself would only have the heading.

Note that the button position above used would overlap the "Window Tag" button if you have that option enabled, so you might need to change the Left and Top parameters to put it somewhere else -- that takes some experimentation.

### E-mail confirmations with transaction detail

**DISCLAIMER:** *This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:*  
<https://campgroundmaster.com/help/overview32.html>

**UPDATE -- Newer versions have E-mail confirmations with transactions built in as a standard form. For reference or for older versions, here is the original article:**

Many wonder why transaction details can't be added to the E-mailed confirmation, like they are on the printed confirmation. The reason is that since the E-mails are sent in plain text, you have no control over what font the recipient uses when viewing the E-mail. If they don't use a fixed-pitch font like Courier, then there's no way to get columns to line up right-justified so the amounts will appear in a neat column. Rather than include a standard feature that doesn't look very good, we have not included this option in the program. There are a couple "workarounds for the desperate and technically inclined", which we generally leave up to the user to figure out since we can't officially support them. But since it's asked so often, I've decided to include a couple options here.

Note that this assumes that you already have the SMTP setup done in Campground Master so you can send E-mails directly. If not, see the documentation here:  
<http://campgroundmaster.com/help/smtpsendmailsetup.html>

Option 1 -- PDF attachment. The new version (7.0) allows attachments to E-mail. So you can use a PDF printer to print it to a file, then you can send it via Campground Master (before version 7, some people still used a PDF printer but had to E-mail it outside of Campground Master).

You first need to install a "PDF printer driver" (look for one on Google), so you can print the standard letter with transactions to a PDF file. Then use the new "Attach" option when E-mailing to attach the PDF file.

Option 2 -- Advanced Customizations. We did create a sample E-mail form with transactions. It uses the same formatting as 3" receipts with the amount on a separate line from the description. This is not ideal, but at least allows the dollar signs in the numbers column to line up with each other no matter which font is used. So all you need to do is import the sample form:

1. Go to Maintenance / Advanced Customizations / Forms
2. Click the Import Form(s) button, and you'll get a typical Windows file-open dialog labeled "Import Forms".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top).
4. Now select the appropriate file, "Sample Forms - Custom versions of Confirmations", and click Open. Note that this will import several new forms. You might get some warnings about renaming some items, just click OK.



Now the forms will be added to the bottom of the list, and will appear as form selections when you send an E-mail. The one with transactions, in case it's not obvious, is "Custom E-mail confirmation w/transactions". You can change the order and delete ones you don't need if preferred.

Important: If you've previously created customized confirmations, this imported sample will not include those customizations. You would need to modify your customized ones to include the transactions as the sample does.

Note that when you click the "E-mail Confirmation" button now, you will get a list of forms to choose from. It will remember the last one used as the default for next time, but if you prefer to have only one form and thus skip the selection dialog, then delete all other E-mail forms or make them Inactive.

### E-mailing a thank-you letter, cancel notice, etc.

**DISCLAIMER:** This article involves *Advanced Customizations*, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

Some users have requested being able to E-mail other types of letters besides confirmations, like thank-you notes after check-out, cancellation notices, etc. This hasn't been added to the standard features because there are so many variations on what might be needed in them, and also because it's already possible through Advanced Customizations. Here's a generic example of adding an E-mail form and how to modify the text as needed.

The good news is that we've done sample forms with all of the "hard" stuff already in them -- the heading with the name & address, reservation information, etc. So all you need to do is import an example, remove the bits you don't need and change the special text. Once an additional E-mail form of any kind is added, the "E-mail Confirmation" button on the Reservation Transactions dialog will show a list of your forms so you can choose the one to send.

Note that this assumes that you already have the SMTP setup done in Campground Master so you can send E-mails directly. If not, see the documentation here:

<http://campgroundmaster.com/help/smtpsendmailsetup.html>

1. Go to Maintenance / Advanced Customizations / Forms
2. Click the Import Form(s) button, and you'll get a typical Windows file-open dialog labeled "Import Forms".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top).
4. Now select the appropriate file, "Sample Forms - E-mail confirmation with special text", and click Open. You might get some warnings about renaming some items, just click OK.
5. Scroll to the bottom, where you'll see the new form. You might want to make a copy of it so if you make a mistake you can start over without having to import it again. Just select it and click Copy selected form(s). Now select the form (or your copy) and click "Edit form definition" (or as with most lists like this, you can just double-click the entry to edit it).
6. You'll see a lot of complicated information... but mostly you want to focus on 2 things in the top area:



**Form name:** Change this to whatever you want it to be called.

**E-mail subject expression:** Click Edit, and change the text inside the quotes to the topic, e.g. "Thank you for visiting Heavenly Camp". Be sure to keep the quotes at each end, otherwise it won't work. This is really a programmable expression that would allow adding information to the subject like their name, etc., but we won't cover that here.

7. Now for the Elements -- there's a big list of elements that tell it exactly what to put in the E-mail. Most of it "looks" pretty obvious as to what it does, but I don't recommend messing with any of it unless you want to remove something. Generally you can just Delete the elements for the information you don't need, but be careful to delete the right elements, e.g. both the Text element that's a label and the Data Expression element(s) that put the information there. For now, just continue with the next step...

8. Check the "As E-mail" box at the top under "Save & Test Form", and then click the "Save & Test Form" button. That should open an E-mail dialog to some customer (I believe it will use the latest reservation made that has an E-mail address for the customer). You can see what the E-mail will look like for that reservation. Note the 2 lines \*\*\*\*\* TOP TEXT HERE \*\*\*\*\* and \*\*\*\*\* BOTTOM TEXT HERE \*. This is what you can easily change to your special text, using one or both locations. For now click Cancel (don't send it!) and get back to the list of elements.

9. Now if you scroll through the elements, you can easily find those 2 lines under the Text column. All you need to do is Edit those elements and replace them with the text you want for your E-mail message. It can be as long as you want, since it will wrap to multiple lines as needed.

Again, there may be a lot of those other elements that you don't want on your special E-mail (unless it's a confirmation letter). By going back and forth to Save & Test Form, you should be able to figure out which Elements correspond to the parts you want to delete.

10. Of course when you're all done, Save and Close.

Have fun!

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## Newsletter #42 (May 21, 2016)

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### Contents

#### What's New

- EMV / "Chip" credit card support
- Windows 10 - Printer issues
- Windows 8/10 - Cash Drawer issues
- GMail problem sending E-mails
- Bar code printing software

#### Q & A

- New credit card in Guarantee not being used
- Viewing past electric meter readings
- E-mailing receipts
- Applying customer credit balances to reservations

## **What's New**

### **EMV / "Chip" credit card support**

It seems like every customer has asked us about this already, but in case you're not aware of the situation, please refer to our web site for the latest information:

<http://campgroundmaster.com/emv.html>

Of course this only applies to the software if you're processing cards through Campground Master, but if you're just curious about what the EMV requirements mean to you in general then you may still want to read the notes on the web site.

Also, if you're not already processing cards through Campground Master, this would be an ideal time to start since you will need to get a new card reader anyway. See here for details:

<http://campgroundmaster.com/creditcards.html>

### **Windows 10 - Printer issues**

We have had quite a few reports of printing problems after Windows 10 is installed, usually things like reports to go to the 3" receipt printer, 3" receipts going to the wrong printer, or 3" receipts not showing all of the information.

The primary issue (going to the wrong printer) is usually caused by a change in the "Windows default printer".

There is a new setting in Windows 10 to let Windows manage the default printer -- you want to turn that off because it keeps switching the default Windows printer to the most recent or most-used printer (which is often the 3" printer if you use one).

In Windows 10, go to the Start Button / Settings / Devices and TURN OFF "Let Windows manage my default printer".

Then, you want to go to the Start Button / Settings / Printers and make sure the correct printer is selected as a default (usually you want this to be a full-size printer).

Then, go to File / Printer Setup / Receipt printer (3" paper) using a Windows driver, and select a \*different\* printer (e.g. your main printer), and close Campground Master.

Finally, re-open Campground Master, go to File / Printer Setup / Receipt printer (3" paper) again and select the receipt printer.

If other receipts or reports aren't printing to the right printer, repeat the last 2 steps for each of the other selections in the Printer Setup menu.

### **3" receipt missing numbers, etc**

If the 3" receipt doesn't look right, most likely it's the paper size setting. Go to File / Printer Setup / Receipt printer (3" paper) using a Windows driver, and make sure it has the correct Paper Size selected -- usually a "Roll paper" option.

## Windows 8/10 - Cash Drawer issues

If you have a cash drawer connected to a 3" receipt printer and it's not working after installing Windows 10 (or any Windows upgrade), then it's most likely the printer selection or an issue with the printer driver. In this case, refer to the previous article, Windows 10 Printer issues, to solve the problem.

If it's a USB cash drawer (APG brand) instead of a printer-driven drawer, then you need to make a change in the registry to fix a known issue with the APG driver. See "Remedy #2" in this article from APG:

<https://www.cashdrawer.com/model-554a-usb-cash-drawer/>

## GMail problem sending E-mails

GMail E-mail issues are constantly changing. For the latest details, refer to the GMail settings information in the current documentation:

<https://campgroundmaster.com/help/gmail-settings.html>

## Bar code printing software

One of our customers has found a very inexpensive bar code printing package if you need to print your own bar code labels. This appears to be a better option than the package we have been selling, so now we'll be recommending it instead. It's called Code.X. Bar Code Label Designer, and can be found here:

<http://www.barcodelabeldesigner.com/>

## Q & A

### New credit card in Guarantee not being used

**Q:** I put a new card in Customer's Guarantee Info, why is it using their old one?

**A:** It can't tell **when** you changed the credit card guarantee info. It looks at the "Guarantee info" on the Customer record **last**, because that's usually the first credit card ever used for the customer. The Transactions (payments) are assumed to be the most recent activity on the account, so it always checks those first, followed by the Guarantee Info on the Reservation (since that's specific to this reservation), and finally the Guarantee Info on the Customer.

If you want to override any previous credit card info so it uses a new card entered, you need to first use the "Remove a customer's c.c. info" function, then put in the new card information. See details here:

<http://campgroundmaster.com/help/removeacustomerscreditcar.html>

### Viewing past electric meter readings

**Q:** How can I see what a site's past meter readings were?

**A:** As of version 10.0, there is a "Meter History" function which tracks all past readings entered (and charges added to reservations if applicable). View the documentation here:

<https://campgroundmaster.com/help/meter-history.html>

Another way would be to look at the transactions. Use the Charges by Category quick-report, then filter by category (e.g. Electric Meter), optionally use the Site/Reservation filter to select a single site, and finally uncheck "Summarize" to see details. The Description field will have the readings.

Another option would be to go to Site Details, then click Audit Trail to view the audit trail:

<http://campgroundmaster.com/help/overview45.html>

Using this you may need to dig through more info since all changes to the site will be included, not just meter readings.

## E-mailing receipts

**Q:** How can I E-mail a receipt to a customer?

**A:** Versions 9.2 and later have standard "E-mail receipt" forms that you can use (version 10.0 added receipt with better transaction lists). Assuming you have SMTP Setup enabled and configured, use the "E-mail Form" button in Reservation Transactions, and select the desired format. See here for more details:  
<https://campgroundmaster.com/help/e-mailingreceipts.html>

Older information for reference, if you don't have at least version 9.2:

Version 7.0 and later allows attachments to E-mail. So you can use a PDF printer to print it to a file, then you can send it via Campground Master.

You first need to install a "PDF printer driver" (look for one on Google), so you can print the invoice to a PDF file. Then use the Attach option when E-mailing to attach the PDF file.

Alternatively, in version 8.0, there's a new "E-mail receipt" sample form that you can import. It's not pretty like a PDF receipt since it's just text-based, which is why we haven't been encouraging it, but it may fit your needs. Once imported, you'll have that as another choice when you click the "E-mail confirmation" button.

1. Go to Maintenance / Advanced Customizations / Forms
2. Click the Import Form(s) button, and you'll get a typical Windows file-open dialog labeled "Import Forms".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top).
4. Now select the appropriate file, for instance "Sample Forms - E-mail receipt with transactions", and click Open. That will add the new form. Close the Forms Setup.

The new E-mail form will appear as an additional selection option when you click the "E-mail confirmation" button in the Reservation's Transaction dialog.

## Applying customer credit balances to reservations

**Q:** I have a customer with a credit balance. How can I move that to a new reservation?

**A:** A "credit" balance usually comes from excess Payments or Deposits. Assuming it's **just** on the customer and not due to another reservation (see below), then use Payment Transfer (or Deposit Transfer) to transfer it

form the Customer to the reservation. If it's really due to another reservation, you'll need to do the transfer from one reservation to the other. See the documentation here:

<http://campgroundmaster.com/help/transferringdepositsandpaym.html>

If you're not sure whether it's on just the customer or due to another reservation, one way to check is from Customer Details, click Reservation History. It will show the balance of each reservation, so you can tell if any show an unexpected balance.

Also, before starting make sure you check for Orphaned transactions, in case the imbalance is really due to transactions not showing up where they should be, rather than a misplaced payment.

<http://campgroundmaster.com/help/reportandrepairtransactions.html>

Finally, if you just can't figure out why the customer balance isn't the same as the reservation balance, see this article:

<http://campgroundmaster.com/news/resolvingcustomerbalancesno.html>

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## Newsletter #43 (Aug 6, 2017)

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### 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

- Some tips when calling for support
- EMV / "chip" credit card support
- Yahoo problem sending E-mail

#### Q & A

- Credit card processing time-outs
- Deleting POS Inventory Items
- Keeping Customer Notes separate from Reservation Notes
- Filter available Sites by Rig Type
- Changing a reservation's text on the Rack
- Using a "Pencil-In" feature

#### Tips & Techniques

- Proper Rates order for Auto-Rates
- Query for Arrivals filtered by Resv Type, etc
- Color-coding Sites dirty, Work order or Journal entry
- Color-coding Reservation Types (revisited)

## What's New

### 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 to 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

Version 9.0 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

Yahoo E-mail issues are constantly changing. For the latest details, refer to the Yahoo settings information in the current documentation:

<https://campgroundmaster.com/help/yahoo-settings.html>

## 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's 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 low 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.

#### Other notes:

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 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

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<https://campgroundmaster.com/help/overview32.html>

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

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<https://campgroundmaster.com/help/overview32.html>

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 (x86)\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)

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<https://campgroundmaster.com/help/overview32.html>

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. **IMPORTANT** -- 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.

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## Newsletter #44 (Oct 14, 2017)

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#### 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](#).

## Q & A

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## Q & A

### E-mail forms -- long text not wrapping

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<https://campgroundmaster.com/help/overview32.html>

**Q:** When creating a custom E-mail Form with the new "fixed pitch" format (introduced in version 9.1), long paragraphs don't "wrap" and show all on one line. Printing an email with a long line makes the text become very small. We can, of course, add the line breaks ourselves to the text, but it would be good to have text elements that wrap, leaving the transactions and address sections in the fixed <pre> format.

**A:** This can be resolved a couple ways (these involve editing a custom Form in Advanced Customizations):

1. In any of the Form Elements that have long text, check the "Auto-wrap" option at the bottom. It will automatically insert line breaks according to the Form's "Character columns" setting (make sure you have it set to around 70 or 80 Characters).
2. Since HTML is supported, you can use your own manual HTML formatting, so the <pre> tag is only used around the table. This of course requires some HTML coding knowledge, but you can import the sample "Sample Forms - E-mail confirmation with trans, logo (HTML)" to see how manual HTML formatting is done. See the article "Adding a logo" later in this newsletter for more details.

## Batch E-mail -- saving the filter

**Q:** For Batch E-mailing in the new version 9.1 (e.g. through Reports / Reservation E-mail list and Batch E-mailing), it would really help to be able to save a filter. You spend 5 minutes getting the filter correct for a large batch, but then need to check something else before sending. When you come back you've lost it and have to start again.

**A:** We're hesitant to make it save the filter on the standard reports -- that usually leads to problems when people forget what they filtered last month and don't understand why it's not showing what they want (which could be especially disastrous if it results in a large batch of E-mails being sent to the wrong customers). If you have some filtering that you use often then you may want to set up a Query with that filter. The Quick-filter function makes that easy -- see the example here:

<http://campgroundmaster.com/news/queryforarrivalsfilteredby.html>

Then you can open the Query and right-click on it any time to use Print or E-mail for all shown reservations / Reservation E-mail list (Print/E-mail).

## E-mail confirmation requires an extra step to select a form

**Q:** We used to just click the "E-mail Confirmation" button and the E-mail showed up, ready to send. The new version 9.1 requires an extra step of selecting the E-mail Form to send. Can we avoid this extra step?

**A:** The extra step is because there are now multiple E-mail Forms defined by default, including an Invoice, Receipt and Statement, plus the new Confirmation E-mail with Transactions. To avoid adding yet another button in an already-crowded Transaction dialog, we changed the old "E-mail Confirmation" button to a more generic "Send E-mail Form", and let you select which form to E-mail in the next step. (Customers who had created or imported additional E-mail forms were already seeing this.)

The last Form you selected will always be selected again by default so all you have to do is click one more button ("OK") to use that Form again, but perhaps you want to simplify it for your users and never need to use the other new formats. In that case, it can be done -- if there is only one E-mail type Form enabled, it will skip the step of selecting the Form and will go right to the E-mail, as it did before (or skipping the preview if you have it configured that way). You need to go to Maintenance / Advanced Customizations / Forms, then Edit each Form where the Form Type is "E-mail", unchecking the "Enabled" box at the top to disable it (except for the one confirmation E-mail you want to keep enabled).

## Reconciling old Reservation balances

**Q:** How do I reconcile old reservations with a balance due to get them balanced out in the system?

**A:** It depends on what a particular situation is (did they cancel and you left Charges on it by mistake, or did they pay but you didn't enter the Payment, etc). It also depends on what kind of reporting you've been doing (or exporting to QuickBooks) and how any changes might affect those reports.

The "quick & dirty" solution would be to just delete the old transactions. Of course that will affect any reports re-done for that time period, and of course if you depended on reports back then for your accounting, don't forget that they may have been incorrect originally so you might need to adjust for that somehow. You also couldn't delete any Payments made by credit card if you're processing them through Campground Master.

You could also enter offsetting transactions (a payment if it wasn't entered before, or "reverse charges" to make negative charges to offset charges that weren't paid), and back-date those to an appropriate date (which will again affect historical reports).

Again, make sure you understand how it will affect your reporting before making any changes.

## Speeding up the Rack view

**Q:** What causes the Rack screen to be so slow and rewrite line by line?

**A:** This is most likely due to having one or more "Show # Sites Available" options enabled in the Rack Options (click on the "Options" button at the top of the Rack to review the settings). Those can be very slow when your database gets larger.

Other things that can affect the speed include using a custom *Color Scheme* with complicated formulas, *Queries* inserted below the dates or next to the Sites with additional information, Showing unassigned reservation counts ("No Site"), or having a large number for "Default past days" or "Default future days".

In addition, there are some things that may be causing Campground Master to slow down in general (usually affecting more than just the Rack):

1. Database getting too large -- if you've been using Campground Master for more than 5 years, you should consider using the Purge function (under Maintenance) to clear older data.
2. Auto-saving too often or too slowly -- check Maintenance / Program Options / Database. Where it has "Automatically save database after each action", try increasing the number of seconds, e.g. to 60 seconds. Do NOT uncheck the auto-save option, since you will risk losing a lot of data if there is a computer crash.
3. Networking issues -- if you're using multiple computers, a synchronization issue can bring all of the workstations to a crawl. To solve this, perform a Full Network Resync on the Master (see Network Functions).

Also pay attention to the Status Bar at the bottom of Campground Master, since it may tell you what it's doing when there is a delay.

## Credit Card Refunds - "cannot exceed sales cap" error

**Q:** When we are trying to process a credit card Refund, sometimes an error comes up saying "Cannot exceed sales cap." What does that mean?

**A:** When doing a Refund transaction it will usually reference the last credit card Payment (instead of sending new credit card information), to refund it to the same card that was used for the last Payment. The error indicates that it's not allowing you to refund an amount larger than that original Payment.

Assuming you're using version 10.1 or later, you can simply select a previous credit card payment large enough for the refund (or multiple smaller ones if needed) -- this is explained in the current documentation: <https://campgroundmaster.com/help/refunds.html>

There is also a more recent article here:  
Credit Cards - Refund getting "Exceeds Sales Cap" error

For older versions...

If there were multiple payments of smaller amounts, you may need to do a partial refund, e.g. not exceeding the amount of each payment. Or perhaps the payment you want to refund is larger than the most recent payment (like a security deposit). Therefore you would need to temporarily move transactions around so the payment you want to refund is on the bottom (back out of Reservation Transactions, go to Reservation Details

and then Transaction History to move them around). Make sure you put them back in the right order when you're done or else it will affect reporting.

## **Tips & Techniques**

### **E-mail confirmations -- putting the customer name in the Subject**

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<https://campgroundmaster.com/help/overview32.html>

As we add more E-mail flexibility and types of forms, there may be more desire to customize certain parts of it. One of the nice things you can do is add the customer's name to E-mail "Subject" line so it's more personal.

This requires a relatively simple change to the Form definition in Advanced Customizations, but as with all Advanced Customization functions it's more like computer programming and precision matters.

Here are the steps for adding the names:

1. Go to Advanced Customizations / Forms, and Edit the Form of interest (e.g. "Confirmation letter, E-mail"). You'll see the E-mail subject expression in the top area -- click the Edit button next to that.
2. Change the expression to:

```
"Reservation confirmation for " + Cust:Cust_First_Names + " " + Cust:Cust_Last_Name
```

It has to be exact to avoid a "syntax error", including the quotes and spaces just as shown, so it's best to copy-paste. Make sure you don't have a line break in there if your E-mail breaks it up.

3. Save that, and save the form definition. Now it will add the customer's name(s) to the subject line of each confirmation E-mail.

### **Adding a logo to E-mail confirmations**

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<https://campgroundmaster.com/help/overview32.html>

Adding a logo to E-mail confirmations was not possible before version 9.1 since only text E-mail was supported, but now it's possible as a side-benefit to supporting HTML protocol in E-mail Forms. There are 2 sample Forms you can import that show how it can be done -- you'll just need to provide an URL to your logo (which must already be available on your web site, for instance).

1. Go to Maintenance / Advanced Customizations / Forms.



2. Click the Import Form(s) button, and you'll get a typical Windows file dialog labeled "Import Forms". You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\Campground Master\Samples. Use the "Look In" drop-down box at the top of the dialog to navigate up to C: if necessary, then double-click each folder (Program Files, then Campground Master, then Samples) to get into the Samples folder.

3. Now select the appropriate file and click Open. Choose one of these:

Sample Forms - E-mail confirmation with trans, logo -- this is the simpler version, but does include the transaction details on the confirmation. It relies on the fact that any E-mail Form with "Fixed pitch" selected has the required HTML heading and footing generated automatically, so all you have to do is include the HTML <img> tag with an URL at the top.

Sample Forms - E-mail confirmation with trans, logo (HTML) -- this one includes the entire HTML coding explicitly, which allows more flexibility. For example you could move the <pre> tag down so that only the Transaction Table is fixed-pitch text and the rest of the text is proportional, which could look nicer.

The new Form(s) imported will appear at the bottom. You can use the Move Up function to move them to a different location in the list if preferred.

4. Replace the URL of the logo file with your own (select the element showing the HTML code for the logo and Edit Element). e.g., replace:

```

```

with a link to your logo file on your web site:

```

```

You'll want to make sure the image you choose is a reasonable size for the E-mail, or else use more advanced HTML to size it appropriately (not covered here -- contact your webmaster).

Note that you won't be able to see what it really looks like in Campground Master's "Save & Test" function or even when sending it -- you can only see the raw HTML code before it's sent. Send one to yourself to verify that it looks right.

While there aren't specific samples for adding the logo to the other new E-mail forms like invoice, receipt or statement, you can create them yourself by importing a sample and adding the logo as in the confirmation sample above. For instance, import the sample form "Sample Forms - E-mail receipt with transactions", and then copy the top HTML element(s) as shown in the confirmation example to the receipt form (for the explicit-HTML example, also copy the bottom HTML elements).

The form(s) added will now appear in the Select Form list whenever an E-mail function is selected, e.g. "Send E-mail Form" from Reservation Transactions.

## E-mailing a cancellation letter

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<https://campgroundmaster.com/help/overview32.html>

There was an article published before showing how to import an E-mail receipt and modifying it to be a cancellation letter. Now in version 9.1 there is a specific Sample Form you can import that's already designed as a cancellation letter, which also includes the new transactions table.

1. Go to Maintenance / Advanced Customizations / Forms
2. Click the Import Form(s) button, and you'll get a typical Windows file-open dialog labeled "Import Forms".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top).
4. Now select the appropriate file, "Sample Forms - E-mail cancellation with transactions v9.1", and click Open. (Make sure you import the one with "v9.1" in the name so it has the newer transaction table). You might get some warnings about renaming some items, just click OK.
5. Scroll to the bottom, where you'll see the new form. You could use it as-is, or modify the text in it as needed.

Modifying the text:

You might want to make a copy of it so if you make a mistake you can start over without having to import it again (or to have multiple versions). Just select it and click Copy selected form(s). Now select the form (or your copy) and click "Edit form definition" (or as with most lists like this, you can just double-click the entry to edit it).

Then you'll need to look through the elements for the text to change. For instance, the two near the bottom starting with "We're sorry you weren't able to stay" and "Please let us know if we can be of service". Edit the elements and replace the text as needed. Be sure to refer to the documentation if you don't understand the details of editing elements.

The Form(s) added will now appear in the Select Form list whenever an E-mail function is selected, e.g. "Send E-mail Form" from Reservation Transactions.

### E-mailing a thank-you letter

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<https://campgroundmaster.com/help/overview32.html>

There was an article before showing how to import an E-mail receipt and modifying it to be a thank-you letter. Now in version 9.1 there is a specific Sample Form you can import that's already designed as a thank-you letter, with easily modified text.

1. Go to Maintenance / Advanced Customizations / Forms
2. Click the Import Form(s) button, and you'll get a typical Windows file-open dialog labeled "Import Forms".
3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top).
4. Now select the appropriate file, "Sample Forms - E-mail thank-you letter", and click Open. You might get some warnings about renaming some items, just click OK.
5. Scroll to the bottom, where you'll see the new form. You could use it as-is, or modify the text in it as needed.

Modifying the text:

You might want to make a copy of it so if you make a mistake you can start over without having to import it again. Just select it and click Copy selected form(s). Now select the form (or your copy) and click "Edit form definition" (or as with most lists like this, you can just double-click the entry to edit it).

There are only a couple Text elements defining the text of the E-mail -- the "top" text (main paragraph) and "bottom" text (signature). You can just Edit these elements or add as many others as needed. See the documentation for details on editing elements if needed.

The Form(s) added will now appear in the Select Form list whenever an E-mail function is selected, e.g. "Send E-mail Form" from Reservation Transactions.

## Rates -- Special case rates using a Reservation type

A previous newsletter article covered one way of handling special-case rates (such as grandfathering a rate for a customer or other special situations) by setting up an Attribute for it. While that is good enough for many cases, sometimes it's better to use a new Reservation Type instead. Using a separate Reservation type (e.g. instead of the standard "Normal" or "Monthly") will allow greater control of reporting & filtering reservations of that type, as well as allow you to set up a special Color Scheme more easily. One example where this would work well may be if you have a special rate for people attending a rally (using a "Discount" type isn't recommended because that would stick with the Customer, giving them the discount next time they visit also).

Here are the details:

1. Add a new Reservation Type -- go to Maintenance / Pick Lists / Reservation Types, check "Allow Editing of fields", and click "Add record". For more details on Pick Lists, see the Help for that function (press the F1 key while in the function).
2. Set up your Rates for that new type (Maintenance / Park Setup / Rates). This can be easily done by selecting the normal rate(s) already defined and clicking "Copy Selected Rates". Then edit the copies as needed (description and price), as well as selecting your new Reservation Type (click the "Resv Types" button in Edit Rate Definition). This last step is important so the special rates **only** apply to that Reservation Type.
3. Make sure you Move your new special rates up in the list so they are above the normal rates, otherwise they may not work with Auto-Rates (depending on how strict you were with the Resv Types in the normal rates).
4. If you want to make them a special color, see the previous article on creating a Color Scheme for new reservation types:

<http://campgroundmaster.com/news/color-codingreservationtypes.html>

Now all you need to do is remember to select that Resv Type for any reservations that need the special rate.

## Changing tax rates

**NOTE: This information has been updated and added to the documentation under Taxes Setup. Refer to that for current information.**

Original article:

We're often asked how to change the tax rate, e.g. when a new sales tax rate is taking effect. Unfortunately the answer isn't always simple, and it depends on how you're doing accounting and how or when you want the new tax to apply.

Do you want the new tax to apply to any reservation that **arrives** on a set date (even if they already paid a deposit or you already entered their charges, so it adds the extra tax when they check in)? In this case, you would need to add a separate category for the new tax and set up a complete separate set of Rate definitions, similar to this article:

<http://campgroundmaster.com/news/canadashsttaxchange.html>

Or, do you want it to apply only to charges you **enter** after a set date, not to any charges you may have already entered? In that case it's very easy, just change the Tax rate in Campground Master **on that date** so it applies to all future entries.

<http://campgroundmaster.com/help/taxessetup.html>

Note that if you're using Auto-rates, this would cause previously-charged reservations to be recalculate at the new tax rate if you do anything with them (including just checking them in), so you would need to disable automatic recalculation for those that should not be affected (in Reservation Details).

## Rates Setup - 2-night minimum for weekends

We're often asked if you can force 2-night minimums, e.g. for a weekend or for holidays. While there isn't a built-in way to actually **force** 2-day stays (and any Advanced Customization solution would be complex and not fool-proof -- see a previous article in newsletter 38), there is a way to make sure that Auto-Rates will always charge 2 weekend nights even if the reservation has only 1 night on the weekend. These same techniques could be used for similar cases of 3-day holiday weekends, etc., with appropriate modifications.

**UPDATE:** Version 10.0 added Reservation Restrictions to actually make this possible to enforce minimum stays. See the new article here:

<https://campgroundmaster.com/news/reservation-restriction---3-da.html>

Of course you may still want to have rates set up like explained below:

This example covers the specific case of making sure that if they stay on a weekend (Friday or Saturday), that they are charged 2 days at the weekend rate even if they only stay one weekend day and another weekday (e.g. Sunday or Thursday). This also covers the case of charging 2 nights even if they stay only one night (optional).

There is too much to cover for a step-by-step walk through, so this assumes you're already familiar with basic Rates Setup and most of the common situations, e.g. as covered in the "Rate Setup Examples" in the documentation.

### The Details:

It will need to first check for the reservation being on both weekend days, then for it "touching" a weekend (1 weekend day plus 1 weekday), and finally for being only 1 weekend night (optional). So you need to create 2 or 3 special rates:

1. First is the "both weekend days" rate -- similar to a normal weekend rate (Fri & Sat selected), but make a 2-day rate e.g. "Rate is per 2 (# of) Days, and the Charge amount will need to be for both days (e.g. if \$30/day, enter \$60 for the Each amount).
2. Second is the "touching a weekend" rate. The way to handle the "touching a weekend" rate is to have a 2-day rate with the days Thu through Sun selected -- same as above but covering all 4 days, Thu/Fri/Sat/Sun. The reason this is a separate rate and 2nd in order is so that it's not used for the first 2 days of a Thu-Sat stay -- e.g if they stay 3 days Thu/Fri/Sat, the Fri-Sat should be covered by the 2-day rate above, leaving Thu for the normal weekday rate.
3. Those 2 rates will handle 2-day (or more) stays touching Fri/Sat. Now you may also need to consider a 1-day stay that would also need to charge 2 days. So make a 1-day rate with only Fri & Sat checked that still has the 2-days' Charge. If you don't want 1-day weekend stays to be charged for 2 days, then you'll still need a 1-day weekend rate, but just make it charge for the single day.

Of course this will need to be done for EACH site type and season, situation, etc. that would normally have a different weekend or weekday rate, if you have such multiple situations.

As always, the order is important. It should look like this:

...any monthly/weekly first  
 Any 1-day holiday rates that should override weekends  
 Any 1-day discount rates that would override weekends (see note below)  
 2-day weekend-only rate (Fri/Sat) as explained above  
 2-day "touching weekend" rate (Thu-Sun) as explained above  
 1-day weekend rate (optionally charging for 2 days as explained above)  
 1-day (normal) weekday rate

Note that if you have Discounts like Good Sam that also discount the weekend rates, then the 3 separate weekend rates plus the weekday rate need to be duplicated for the Discounts as well, so it would be:

...any monthly/weekly first  
 Any holiday rates that should override weekends  
 Discounted 2-day weekend-only rate (Fri/Sat)  
 Discounted 2-day "touching weekend" rate (Thu-Sun)  
 Discounted 1-day weekend rate (optionally charging for 2 days as explained above)  
 Discounted 1-day weekday rate  
 Non-discounted 2-day weekend-only rate (Fri/Sat)  
 Non-discounted 2-day "touching weekend" rate (Thu-Sun)  
 Non-discounted 1-day weekend rate (optionally charging for 2 days as explained above)  
 Non-discounted (normal) 1-day weekday rate

Of course if you need to do the same for holiday stays that "touch" a holiday, that gets even more complicated... although that can often be done by simply extending the Season Dates Applicable to 1 or 2 days before/after the holiday.

## Enlarging the Transactions dialog

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work

*through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:*  
<https://campgroundmaster.com/help/overview32.html>

In cases where you use extra-long Descriptions or Category names for transactions, the default Reservation Transactions dialog may not be wide enough for you to see the Total column without scrolling over. Advanced Customizations allows you to enlarge this dialog (and the transaction table) so you can see more.

This article will only cover widening it, for simplicity. The same technique could be used to also make it taller so you can see more transactions at once, however that takes a lot more work due to the number of controls below the grid that would have to be moved.

1. The first step is to add a Dialog definition that's an Add-on to the Reservation Transactions dialog. Go to Maintenance / Advanced Customizations / Dialogs, and click "Add dialog definition".

Note: Only one Add-on definition can be active for a given dialog, so if you already had such a definition for other purposes then you would just add the elements below to the existing one instead of creating a new one here (in which case, skip to step 3).

2. Give it a name, such as "Resv Trans add-on". Then check the "Add-on" box and select "Reservation Transactions" from the list. Also make sure the "Enabled" box is checked.

3. Enter 200 for the Width (which will add 200 pixels to the width of the dialog).

4. Now we need to enlarge the transaction grid, which is control ID 1038 (as per the Dialog Control ID reference in the Help).

Click "Add Element", and select "Resize control" for the Element Type. Enter 1038 for the Control ID, 770 for the Width and 290 for the Height. Click Save.

5. To make it look better, we'll also need to move the "Total amount due" controls over so they're under the right-hand side of the grid (ID 3195 for the label and 1305 for the value).

Click "Add Element", select "Move Control" for the Element Type. Enter 3195 for the Control ID, 770 for the Left and 422 for the Top. Click Save.

Click "Add Element", select "Move Control" for the Element Type. Enter 1305 for the Control ID, 868 for the Left and 420 for the Top. Click Save.

6. OK, now you're ready to test it. Click "Save & Test dialog" to see what it looks like. The size and location values used here are assuming "normal" font sizes are used in your Windows display properties configuration. You may need to adjust the values according to your particular Windows settings.

**Tip:** There's a free tool called "JR Screen Ruler" that puts a pixel-ruler on your screen so you can quickly get a good idea of what values to use for control locations. Just search Google for "JRuler" or "JR Screen Ruler".

7. Once you're satisfied with the results, just Save the dialog definition. You may also want to do the same for the other Transaction dialogs (Customer Transactions and Unbound Transactions, or even the POS entry (which is more complicated if you want to line things up). Just repeat the steps to add additional Dialog Definitions for each type of dialog.

## Newsletter #45 (Mar 21, 2018)

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### 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

New Documentation Topics  
TLS 1.1 / 1.2 Support for Credit Card Processing

#### Q & A

Fixed Charge in Addition to Per-unit Merchandise Rate  
Customer E-mail Receipts  
Handling a Temporary Stay on a "storage" Reservation  
Entering Credit Card CVC code for Guarantees  
Reporting Site Income Per Day  
Updating a Customer's Rig Size

#### Tips & Techniques

Duplicating Reservations for Next Year  
Work Order Printable Form  
Reporting Unmatched Security Deposits  
Adding 3% Credit Card Surcharge

### What's New

#### New Documentation Topics

We have added some new sections to the documentation to better explain some common issues. Please take a few minutes to look at these, if only to note that they exist if you need them in the future. Click on the links to jump directly to that topic in the online documentation.

- Reservation Linking Examples -- Some detailed examples of common tasks of creating or adding linked reservations (and the whole section on linking has been rearranged to be easier to reference)
- Monthly / Long-term Reservations -- Recommended methods of handling monthly or other long-term reservations are explained in detail.
- Transaction / reporting procedures -- Recommended methods of handling reservation transactions and common reporting issues are explained, such as how best to handle deposits.

- E-mailing receipts -- A basic explanation of how to start E-mailing receipts to your customers.
- Full network synchronization (quick method) -- A new "quick" method of solving synchronization issues has been added which should solve most issues, as long as you're using a current version of the software.

## TLS 1.1 / 1.2 Support for Credit Card Processing

You may have been hearing about the new TLS 1.1 and 1.2 requirements for credit card processing. Support for this was added in version 9.1, so as long as you're staying current with Campground Master updates then you're already covered. Both 1.1 and 1.2 are supported (it will use the highest level requested).

## Q & A

### Fixed Charge in Addition to Per-unit Merchandise Rate

**Q:** I have a Merchandise Rate that's per-liter for propane (the Rate has "Ask for other quantity" selected), but I also need to automatically add a single HazMat fee (flat rate). Can that be done?

**A:** What you can do is add a 2nd Charge transaction to the same Rate definition that has the per-liter charge. For the HazMat Fee, enter the equal sign ("=", no quotes) in the Qty field and press Enter. That will open an Expression Creator for an expression to override the normal Qty. Just enter the number "1" for the expression (no quotes) and Save. Of course enter the Category, Description, and Each amount for the transaction as usual.

Now when you add the per-liter charge it will add the HazMat fee with a Qty of 1 no matter how many liters it is.

For reference, this is explained under "Using Calculated Expressions for Transaction Values" here:  
<http://campgroundmaster.com/help/editratedefinitiondialog.html>

### Customer E-mail Receipts

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<https://campgroundmaster.com/help/overview32.html>

**Q:** Version 9.1 added some standard E-mail Receipt forms for Reservations, but I don't see them for Customers (e.g. through Customer Details, New/Edit Transactions). Can I E-mail a customer receipt?

**A:** First of all, I hope you understand that using Customer Reservations is dangerous if you don't have a specific need for it -- any transactions added there will not apply to their reservation(s).

That said -- there isn't a standard E-mail receipt for Customers, but there's a Sample you can import.

1. Go to Maintenance / Advanced Customizations / Forms
2. Click the Import Form(s) button, and you'll get a typical Windows file-open dialog labeled "Import Forms".



3. You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top").

4. Now select the appropriate file : "Sample Forms - E-mail Customer rcpt w transactions v9.1", and click Open.

Now you will have an "E-mail Form" button on Customer Details and also Customer Transactions, etc.

## Handling a Temporary Stay on a "storage" Reservation

**Q:** We allow people to stay on their winter "storage" site at the normal daily rate. How do we track that without stopping the storage reservation to enter a new reservation for a day or two?

**A:** You can use a "Guest" reservation type to make a short-term reservation on top of the Storage reservation (or any long-term reservation). Since you probably don't want it handled the same way as a typical "Guest" (e.g. different rates), I would add a new Reservation Type for it (e.g. called "Storage stay" -- see Pick Lists for adding Reservation Types), but make the Base Type "Guest" so it can be booked on top of the normal storage reservation. If they are charged the same daily rate as your Normal reservations, just add that new Resv Type to the list of Resv Types on those rate definitions.

For more details on Guest reservations:  
<http://campgroundmaster.com/help/managingguests.html>

## Entering CVC code for Guarantees

**Q:** Since we take a lot of reservations over the phone, we need to take guests' security code or CVC code for their credit card and there is no spot to do so in Campground Master. How might we do that other than writing it on a separate piece of paper?

**A:** According to new credit card merchant rules (PCI compliance), you are not allowed to store the CVC code on a computer, period. This is why it's no longer allowed in Campground Master.

It is never required to have the CVC code to run a charge, and as far as I know it won't make a difference in your fees. It's just an extra verification method. When the customer arrives, you should always swipe their card to get the lowest rate, in which case a CVC code is not needed anyway.

## Reporting Site Income Per Day

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<https://campgroundmaster.com/help/overview32.html>

**Q:** We need a report that gives us our earned income per day. For example, if a "Seasonal Camper" has paid \$3000 and there are 214 nights in our season, the average "earned income" per day is \$14.02 for that site. I did find in the sample Query imports an average daily amount paid, by site type. This reports the average income on the last day of the stay. I need a report or query that gives me the average income for the stay for each day of the stay, per site, not just site type. Is this possible? Thank you in advance for your assistance.

**A:** There is a sample query you can import for that: "Sample Query - Total revenue by site, by reservation dates"

It has the same linked-reservation issue as other transaction reports by site (all transactions are reported under the "Linked Master" site for linked reservations), but it does divide it up by day.

See the documentation for importing sample queries:  
<http://campgroundmaster.com/help/queriessetupdialog.html>

### Updating a Customer's Rig Size, etc.

**Q:** I have noticed on several occasions if a regular customer trades in for a new RV size, I will update the record for his RV size but any future Confirmations still show the old RV size.

**A:** There are 2 different places for Rig Size -- Customer Details (the Customer's information used the "next time"), and Reservation Details / Preferences (specific for that reservation, in case that customer doesn't always have the same rig). If you change it in the Reservation (either through Reservation Details or the New Reservation dialog), that does not automatically change the Customer Details. So be sure you also update Customer Details so the new size is used automatically for future reservations.

## Tips & Techniques

### Duplicating Reservations for Next Year

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<https://campgroundmaster.com/help/overview32.html>

We're occasionally asked about an easy way of duplicating all of the current seasonal reservations for the following year. This can be done with Scripting, but it's a rather advanced procedure.

Version 9.2 includes a Sample "Package" with functions to copy a single reservation or all reservations shown on a tab view to another reservation with the same customer and dates the following year. **Please note that this should not just be used arbitrarily -- it's meant as a starting example you can use to customize for your particular needs, and some programming expertise is required.** As with all Advanced Customization features, standard support does not include helping with any issues arising from this.

To import it, go to Maintenance / Advanced Customizations / Import Package. Select the file "Sample Package - Copy reservations to next year" from the Samples folder under the Campground Master program files folder.

When this sample is imported, 2 new functions will be added to the right-click menu for most tab views (On Site, Arrivals, Departures, Payments Due, etc) -- "Copy this reservation to next year" and "Copy All Shown Reservations to next year".

Note that the sample scripts only copy the standard reservation fields. If you have created your own "User" fields, then code for copying those will need to be added to the script "NewResvOnDates". Also note that it does not copy any charges/rates. Those will need to be added manually, or if you're using Auto-Rates then they will be added at the time of check-in.

## Work Order Printable Form

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<https://campgroundmaster.com/help/overview32.html>

There isn't a standard printable form for Work Orders in Campground Master (only the "record" can be printed, with limited text area). However, version 9.2 includes a Sample Form you can import to be able to print a much nicer Work Order form, and edit it if needed.

1. Go to Maintenance / Advanced Customizations / Forms.

2. Click the Import Form(s) button, and you'll get a typical Windows file dialog labeled "Import Forms". You need to locate the sample Forms folder, which is typically C:\Program Files (x86)\Campground Master\Samples. Use the "Look In" drop-down box at the top of the dialog to navigate up to C: if necessary, then double-click each folder (Program Files, then Campground Master, then Samples) to get into the Samples folder.

3. Now select the file "Sample Forms - Work Order", and click Open.

The new form will appear at the bottom of the list. This sample form should work for most people. Note that there's an area in the form for "Completion notes", meant for hand-written notes by the person performing the work -- this does not come from a field in the database. Editing the form to rearrange fields or add any custom fields you've created is an advanced topic -- see the documentation for details.

To use the form, just open your Work Order (View / Work Orders, select and Edit a work order), and click "Print". Select "Print a Form for this record", and you will be able to select the form in the list, then Print.

## Reporting Unmatched Security Deposits

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

The current method of entering Security Deposits (as a Charge transaction, and then adding a negating transaction when refunding it) is sufficient for most situations. However one thing that's not obvious is how to find out how many "outstanding" security deposits you have, either for past reservations or for current & future reservations.

There was a previous article for reporting outstanding security deposits, that can help you find them but takes several steps each time. It's fairly simple in comparison to the one below because it uses the normal filtering options, so it may be the best solution for you if you're not ready to try the Advanced Customization solution below. See that article here:  
<https://campgroundmaster.com/help/findingoutstandingsecurityd.html>

If that previous solution is not sufficient for your needs, the best (fanciest) way to handle this is by creating a Query that shows the total for Security Deposit transactions (since it should be zero once the original deposit is credited/refunded). Optionally you can use a filter condition that shows any reservation with a non-zero total for Security Deposit transactions, to show only those with outstanding balances.

Here's an example of creating a Query to do that, with various date-condition filtering if needed. Note that this example assumes you have a Transaction Category named "Security Deposit" that you've been using for this purpose, as described in the documentation here:

<http://campgroundmaster.com/help/securitydeposits.html>

(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. "Unmatched Security Deposits"
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.

If you want to filter by a date or other criteria (as opposed to checking every reservation ever made):

8. Click "Edit Filtering Conditions...", then click "Quick-Filter Auto-Builder". This will open the Reservation Selection Filter. For an "On Site" type query to show current reservations only, you would select Filter by date, and select "Start-to-end-inclusive". The option "Using the Query's from and to dates" will be selected by default, which is what you want. You can also select any other criteria (e.g. to include "Checked In" only). When done here, click OK. A prompt may ask whether to use text comparison for pick lists -- go ahead and click Yes.

9. If you want to *only* show those with Security Deposit balances, click "Edit Filtering Conditions..." (unless you did step 8, in which case you're already there). Click "Add New Condition". Enter this expression precisely:

```
LoopSum(1,NumTran(Resv()),"<i>","'-  
TranBalAmount(ResvTran(<i>))','FieldText(ResvTran(<i>),'Tran_Cat') = 'Security  
Deposit')' != 0
```

Pay attention to spacing, whether quotes are single or double, etc. -- it must be exact. If you're viewing this in a format where the line wraps, do not start a new line -- there should be no hard line breaks. If possible, use Copy/Paste instead of typing it.

10. Click Done to get back to Edit List Query Definition.

11. Click "Add Column", and enter the same expression from step 9. Then enter a Column heading (e.g. Security Deposits). Check the box "Show group totals", with "Sum" selected after that. Click Save.

12. You can click "Save & Test" to make sure it works OK if you like.

13. 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. If you created a filter in step 8 to filter by date, set the From and To dates as needed.

Note that if you're filtering by date (step 8), you want to skip step 9 so it will include all filtered reservations even if they don't have a security deposit balance -- then you can verify that their balance is \$0 instead of wondering whether they're being excluded for the wrong reason.

## Adding 3% Credit Card Surcharge

**DISCLAIMER:** *This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation: <https://campgroundmaster.com/help/overview32.html>*

There isn't a way to automatically add a 3% surcharge when paying by credit card, but this shows how to add a button to the Reservation Transactions dialog that will add a 3% Charge with the category "Surcharge" to the current balance. (If you don't have a Transaction Category called "Surcharge" yet, you will need to add that through the Pick Lists).

### Method 1: Import the sample:

If you don't already have dialog definitions for the Transactions dialogs, then you can import the following sample Dialog and it will be done for you. (This is only available if you've installed version 9.2 or later.)

1. Go to Maintenance / Advanced Customizations / Dialogs.
2. Click the Import dialog button, and you'll get a typical Windows file dialog labeled "Import Dialogs".
3. Locate the samples folder, which is typically **C:\Program Files (x86)\Campground Master\Samples** (most likely you just need to double-click the "Samples" folder to get there).
4. Select the appropriate file, "Sample Dialogs - Credit Card 3% surcharge button", and click Open.

Also see the caveats below.

### Method 2: For versions prior to 9.2, or if you already have Transactions dialog definitions, follow these steps:

1. Go to Maintenance / Advanced Customizations / Dialogs.
2. If you already have a dialog definition for the base dialog "Reservation Transactions", Edit that dialog to add this new element. Otherwise, click "Add dialog definition", enter a name for it (e.g. "Resv Trans"), check the "Add-on" box, and select "Reservation Transactions"

3. Click "Add element".
4. Select "Add New Control" for the element type.
5. Enter a control name, e.g. "add surcharge".
6. Select the Control Type "Button"
7. Enter a position and size -- this can vary depending on your display settings, but for "normal" settings it should work to use Left=40, Right=245, Width=120, Height=18
8. Enter desired text for the button in Control Text, e.g. "Add 3% surcharge".
9. Click in the Action Expression box and enter the following expression in the Expression Creator:

```
DlgAddNewTransaction("Charge", "Surcharge", "3% cc surcharge", "", "", "", "",  
ResvDue(Resv()), .03)
```

Pay attention to spacing, whether quotes are single or double, etc. -- it must be exact. If you're viewing this in a format where the line wraps, do not start a new line -- there should be no hard line breaks. If possible, use Copy/Paste instead of typing it.

10. Click Save.
11. Now you can use "Save & Test Dialog" to try it out. *Be aware that anything done in that test will be real transactions on whatever reservation it opens.*

Once satisfied, Save the dialog and Close out of Setup Dialogs.

#### Now some caveats --

This assumes they're going to pay the entire amount due -- otherwise you will need to manually adjust the Qty of the Surcharge transaction to be the amount they will be paying.

The above steps are just for the Reservation Transactions dialog. You can add similar functions on other dialogs (Unbound Transactions, Customer Transactions, and POS), but the expression will need to be different. Change the `ResvDue(Resv())` part according to the dialog type:

For Customer Transactions: `CustDue(Cust())`

For Unbound Transactions or POS: `DlgTransBal()` (requires version 9.2)

The button positions given are for "Normal" Windows text size. If you use different font size settings, then you will need to manually adjust the button left and Right position. See step 7 above.

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## Newsletter #46 (Sept 10, 2018)

### 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

TLS 1.2 support for credit card processing

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## What's New

### TLS 1.2 support for credit card processing

Most parks have already gotten up to speed with the new TLS 1.2 requirements that started in July 2018 for credit card processing. However if you're a seasonal park that was closed in the summer, then this might still be an issue for you and could disable your credit card processing if you don't have the update. This affects users of both MCPS / TGate and Cayan / MerchantWare processing in Campground Master. (X-Charge users will need to get the update from X-Charge / OpenEdge, and also must be using Campground Master version 9.0 or later.)

Support for this was added in version 9.1, so as long as you're staying current with Campground Master updates then you're already covered. If you don't have at least version 9.1, contact us for an upgrade.

### Q & A

#### How to do a credit card refund when there's no balance

**Q.** I entered a credit card payment on the wrong reservation, and need to do a refund. However it has a \$0.00 balance and won't allow the Refund.

**A.** The easiest way to do this is to enter a Credit transaction for the same amount, so it has a credit balance. Then you can do the Refund to refund the credit card, and finally Delete the Credit transaction. Make sure that if it automatically added a "Deposit Applied" transaction with the Credit, delete that also.

## How to Separate Refunds-by-Check on Reports

**Q:** On the Receipts by Payment Method, it's subtracting the refunds we give by check from the checks received, making it hard to follow what's actually deposited in the bank. How can we show refunds separately?

**A:** One way would be to filter it -- after doing Receipts by Payment Method, go to More Filters and exclude Refund from the Transaction Types list (Ctrl-Click on "Refunds" to un-highlight it). However that means doing a separate report to get the refund checks, and it also means that cash and credit card refunds would be excluded.

The better method is to add a new Payment Method for the refund checks, and use that when doing refunds.

1. Go to Maintenance / Pick Lists / Payment Methods, and check the "Allow editing of fields" box.
2. Click New Record.
3. Enter the desired name, e.g. "Refund Check" in each of the fields. Make sure you set Enabled to "Yes".
4. Move that entry up to the desired order, e.g. next to Check, with the Move Up button. Click Close when done.

Now when you enter a Refund, select the new payment method instead of "Check". It will be shown separately on the Receipts by Payment Method report.

## How to find Transactions entered through Customer Details

**Q.** We think that some reservation transactions were entered through Customer Details by mistake, instead of Reservation Details/Transactions. How do we find them easily so we can correct them?

**A.** You can locate them with the Transactions report.

1. Go to the Transactions tab view (the far right tab, or go through Transaction Reports).
2. Click the Detail Options button, and then click Reset the view to details / all transactions so you see all individual transactions.
3. Set the From and To date as needed.
4. If you don't see a "Site" column, go back to Detail Options and select the "Site" field.
5. Click on the Site column to sort by site, and click again to sort backwards. Any transactions that were not done through a Reservation will show "(No Resv)" instead of a site number.
6. If you also do Unbound transactions, you can hide those by going to More Filters, and uncheck the 3 options under "Unbound transactions" in the lower right corner. If you also have POS transactions, you can hide those by unchecking the box at the top "Include POS transactions".

Now you should have all of the ones you're looking for at the top, and of course you can right-click on any of them to get to the Transactions dialog. Once you're there, if you're not sure which ones are the non-Reservation ones, then check the "Show Details" box and scroll over to the "Reservation" column. It will be blank for any transactions entered on the Customer instead of a reservation.

For more details on how to correct Customer vs Reservation balances, see here:  
<http://campgroundmaster.com/news/resolvingcustomerbalancesno.html>



## Reporting pre-payments made for next year

**Q.** How can I get a report of all pre-payments made in 2018 for 2019 reservations?

**A.** Here's what I would suggest to get the pre-payments made for the prior period:

Start with the Receipts by Payment Method quick-report (Reports / Transactions, click [Receipts by Payment Method](#)).

Go to [More Filters](#) to get to the Transactions Filter, then click on the [Sites/Reservations](#) button in the lower right, check "Filter by Date" and select "Start Date", and put the desired reservation dates (e.g. 1/1/2019 to 12/31/2019). Click [OK](#) to get back to the Transactions Filter.

In the Transactions Filter, uncheck all 6 of the "balance" boxes underneath the Sites/Reservations button (to exclude any non-reservation transactions like Customer or Unbound).

Click [OK](#) on Transactions Filter.

Optionally, click on [Summary Options](#), and change the Summarize period e.g. to Monthly, and click [OK](#) (don't click the quick-report again, that will clear the filters).

Finally, select the From and To dates of the transactions to report to bet the Transaction date range (not the Reservation dates) -- e.g. 1/1/2018 to 12/31/2018.

Now you should be showing the total payments made in 2018 for 2019 reservations. If you want the details of course you can uncheck Summarize.

Note: This can only be done with the Receipts by Payments report, not with Receipts by Category, due to the filters needed.

## "Discounts" vs. "Discount Used"

**Q.** What is the difference between the "Discounts" fields in Customer Details and the "Discount Used" on Reservation Details?

**A.** First of all, always remember that Reservations are separate records from Customers. If you want the technical details on that, see here:  
<https://campgroundmaster.com/help/databaseorganization.html>

The "Discounts" fields in Customer Details are a list of "possible" discounts that the customer has. These are a "storage" area for any discounts and their details like member ID's.

The "Discount Used" selection in Reservation Details is the one actually "used" for the reservation -- in particular, if you're using Rates, that can determine which Rate is actually selected (or available) for the reservation.

When a new reservation is made, it will use the first customer "Discount" by default as the "Discount Used" for the reservation. However if you set "Discount Used" in the reservation at a later time, it does not assume that it should be saved for later, and thus will not add it to the Discounts list in Customer Details.

## Cleaning Out Old Transactions & Balances

**Q:** We have a lot of old junk and unreliable transaction information in our system, with a ton of reservations showing balances that shouldn't be there. It would take forever to go through and fix everything shown

incorrectly in the Payments Due report. Is there an easy way to just clear out all of those transactions and start over as of a certain date?

**A:** Version 9.2 has a new "Extreme" option on the Purge Old Data function that can help. Normally a Purge will not remove anything with a balance, but the "Extreme" options ignore balances and do a clean sweep of everything prior to the date you select. You should select the Extreme options under both Transactions and Reservations (in addition to the other options in those sections) to remove the reservations prior to the selected date as well -- otherwise some might still have balances due to transactions straddling the cut-off date.

See here for details:

<https://campgroundmaster.com/help/purgeolddata.html>

## Renumbering Sites

**Q:** I want to renumber some sites, but I get a warning when I do that in Sites Setup. What is the correct way to renumber sites? Should I delete them and start over?

**A:** You want to avoid Deleting sites (in fact it won't let you delete sites previously used), but you can change the numbers as needed. Yes, it will give you warnings if you (temporarily) have 2 sites with the same number, so perhaps that's the warning you're talking about. Just keep going, and once you have them all changed then the warnings should go away.

Of course if you change the number (e.g. in Abbreviation or Site Name) on a record in Site Setup, then any reservations linked to that site record will appear to have changed to that new site number -- in other words, the site record is assumed to represent a physical location, so changing the Abbr/Name of a Site record changes the number assigned to a physical site location.

If you're not actually wanting to change the numbers for physical sites, but rather just changing the site organization on the Rack or something, then just Move the sites as needed in the Sites Setup list. Likewise you could Insert sites if you now have more physical sites.

## Finding Canceled Reservations

**Q:** Is there was a way that we can see in one report all the reservations that have been canceled or the Mistake button was clicked on?

**A:** Yes, just click on the "Non-Reserved" tab view, and select the type you want to see. The you can adjust the From & To dates for prior or future reservations (note this uses the reservation start date, not the "date made").

If you're not seeing the Non-Reserved tab, then it may have been disabled or deleted. Go to Maintenance / Advanced Customizations / Tab Views. If you see Non-Reserved listed, make sure it shows "Yes" for the Enabled field (Edit it if needed to re-enable it). If you don't see it at all, then click the button Add the default tab views to add it back in. (You'll probably need to delete any duplicates after doing that.)

## Paid-Thru date getting set to the Last Night incorrectly

**Q:** Sometimes, e.g. for weeklies and monthlies, the paid-thru date is set to the end of their stay instead of what they're paying for. Why does that happen and how to fix it?

**A:** There is a setting under Maintenance / Program Options / Functions, "Automatically set paid-thru date when a reservation is paid in full", which is probably set that causes it to happen -- but there is more to it than that. This option is usually desirable, so we don't recommend disabling that.

However, if you're manually adding charges for only part of a stay, and they pay that balance in full, Campground Master sets the Reservation as paid in full (assuming that option is set) because it has no way of knowing the time period you've entered charges for, and thus it has to assume you've added charges for the full stay as usual.

To avoid it, assuming you want to keep that automatic option enabled, you need to either:

1. Enter the charges for the **whole** stay, not just part (so they aren't paying in full, in which case you have to manually set the paid-thru date), or...
2. Don't make the reservation's Last Night all the way out -- only set the Last Night to what they're being Charged for (and paying for). That way it will automatically set the Paid-Thru correctly to that Last Night. You can use the "Block To" date to block the site for them for the remainder of their expected stay, and adjust the Last Night each time they pay another portion.

Monthlies do have some other considerations, but **ONLY** if you set the Reservation Type to "Monthly". A detailed explanation was added to the manual recently:  
<https://campgroundmaster.com/help/monthlyextended-stayreserv.html>

## **Tips & Techniques**

### **Adding custom Pick Lists (using v9.2's User-Defined Tables )**

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

One of the powerful new features added in version 9.2 was "User-defined Tables", along with "User-defined Relationships". Together, these allow you to add your own Pick Lists that you can easily use in any of the other tables / dialogs, and also modify the list whenever you want like regular Pick Lists without having to go back and modify all of your custom code.

The complete documentation on custom tables is here:  
<http://campgroundmaster.com/help/overview47.html>

However, that's a lot to dig through to figure out how to just add a pick list. Here is a step-by-step guide for adding a pick list, in this case for adding a "Category" pick list to the Work Orders (which also makes use of the new ability to modify the Edit Work Order dialog).

#### **Step 1 -- Adding the Table**

First we need to add the table for the pick list. In this case we're going to call it "Work Category", but use whatever name you need.

- 1.1. Go to Maintenance / Advanced Customizations / User-defined Tables

- 1.2. Click [Add table definition](#).
- 1.3. Enter "Work Category" in the [Displayed Name](#) field.
- 1.4. Enter "WorkCategory" (no spaces) in the [Internal Name](#) field.
- 1.5. Enter "WCat" (no spaces) in the [Short Name](#) field.
- 1.6. Check the [Pick List](#) checkbox.
- 1.7. Enter "100" for the [ID](#) (assuming this is the first table you're adding, else use the next number available).
- 1.8. Click [Data Field Definitions](#). This will create the default fields needed for a Pick List. You probably don't need to add any more, so just click [Close](#).
- 1.9. Drop down the [Unique Identifier Field](#) list and select "Selection Name".
- 1.10. Click [Edit Raw Data](#) if you want to add some entries now. As with any table or pick list, you'll need to check [Allow editing of fields](#), and use [New Record](#) to add entries.
- 1.11. Click [Save](#) to save the new table.

### **Step 2 -- Adding the field to the Work Orders table**

Before setting up the relationship, we need to add the field that relates to the pick list. Again, our example is "Work Category" in the Work Orders table, but use whatever fits your needs.

- 2.1. Go to [Maintenance](#) / [Data Field Definitions](#) / [Work Order Fields](#).
- 2.2. Click [Add New Field](#).
- 2.3. Enter "Category" for the [Field Identifier](#).
- 2.4. Select "Pick List Item (Enum)" for the [Field Type](#).
- 2.5. Enter "Category" for the [Field Name](#), [Short Label](#), and [Report Heading](#). Make sure [Enabled](#) is checked.
- 2.6. Click [Save](#) to save the new field, and [Close](#) to exit the Data Field Definitions.

### **Step 3 -- Adding the Relationship**

Now we're ready to tell it that the new field is linked to the new pick list table.

- 3.1. Go to [Maintenance](#) / [Advanced Customizations](#) / [User-defined Relationships](#)
- 3.2. Click [Add relationship](#).
- 3.3. Select "Work Orders" for the [From Table](#).
- 3.4. Select "Category" for the [From Field](#).
- 3.5. Select your new table, "Work Category", for the [To Table](#).
- 3.6. Select "Selection Name" for the [Display Field](#). In case you're wondering about the relational technical aspects, the "Record ID" (the [Field\\_Index](#) field) is always the "To Field" for relationships, so there's no need to select it here.

3.7. Click Save.

That's it as far as setting up the pick list. BTW, it won't appear in the standard Pick Lists menu, so any time you need to add or edit items in the list, you would go to Maintenance / Advanced Customizations / User-defined Tables, select your table, and click Edit Raw Data. But we'll also show you how to add a shortcut so you can edit the list right from the Work Order dialog.

#### **Step 4 -- Adding the list to Edit Work Order**

Now we need a way to set the category for the work orders.

4.1. Go to Maintenance / Advanced Customizations / Dialogs

4.2. Click Add dialog definition.

4.3. Enter "Work order" for the Dialog name.

4.4. Check Add-on, and select "Edit Work Order".

4.5. Click Quick-add fields. Enter 150 for the Starting top position, 180 for the Label left position, 240 for the Entry field left position. (These are arbitrary just to get it in a usable position, you can modify as needed later).

4.6. Click "Category" in the Data Field list, and click the --> button to add it to the Fields Selected list. Click Done.

Now for the button to edit categories:

4.7. Click Add element.

4.8. Select "Add New Control" for the Element Type.

4.9. Enter "Edit Cat" for the Control Name.

4.10. Select "Button" for the Control Type.

4.11. Enter 400 for the Left position, 150 for Top, 60 Width, 20 Height.

4.12. Enter "Edit" for the Control Text.

4.13. Click Edit Action Expr..., and then enter the following expression:

```
ShowRawData ( "WorkCategory" )
```

4.14. Click Save twice to get back to Edit Dialog Definition.

4.15. Now you can use Save & Test Dialog to try it out.

4.16. Save & Close all the way out. That's it!

Note that when you View Work Orders, your custom fields are automatically added to the list, in front of the Notes. However this is pretty unique -- adding a Customer or Reservation field does not automatically add it to the associated reports, for instance (that could get out of hand), so it would be up to you to create Queries to use custom fields in reporting (covered elsewhere).

## Avoid "Saving Database" delays each time you make a change

The original default action for Campground Master is to immediately save the database after every change. However, as databases get larger and take longer to save, this can start causing annoying delays as you try to quickly enter transactions, etc. one after another. If you suspect this is causing your delays, look for the "Saving Database" message in the Status Bar at the bottom of Campground Master.

Since there are other safeguards that make complete recovery possible even if computer crashes before the database is saved with your new changes (recovering from an auto-backup and log files), it's not strictly necessary to immediately save the database after every change. Therefore we're now recommending that you change the setting so that it waits for at least 60 seconds of inactivity before it saves the database.

To change this, go to Maintenance / Program Options / Database (you must be an Administrator of course). Change the number in "Wait for \_\_\_ seconds of inactivity" to 60 seconds to start with. You may want to increase that if you find that it's commonly in the middle of saving the database just as you start to do something.

## Handling different Dialog sizes on different Workstations

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<https://campgroundmaster.com/help/overview32.html>

If you have set up custom Dialog Definitions with new or moved controls (fields), you may find that on other networked workstations things don't appear the same, possibly causing overlapping or missing fields. This is due to the Windows display settings being different (e.g. using Large fonts instead of normal fonts, etc), which will automatically change the standard dialog sizes and positions, but not the customized controls.

Obviously the easy way to fix it is to make sure you're using the same Windows display settings on each computer. But just in case that's not practical for your situation, then the alternative is to modify the Dialog Definition to accommodate the different sizes.

What you would have to do is edit the custom Dialog definition, make a Copy of EACH custom control element that's causing the position problem, and change the Top/Left positions in one copy to account for the different font size, and then include a check for the Workstation in each one. Note that this also assumes that the workstation ID's don't change on each computer (which of course they shouldn't under normal operations).

For instance, if the problem Workstation is #2, then one copy (with the modified positions) would have this in the Condition expression:

```
Workstation() = 2
```

...and the other control (original positions) would have:

```
Workstation() != 2
```

If there is already something in the Condition, though, you need to "AND" that with any existing expressions in the condition).... e.g.

```
(existing expression) AND Workstation() = 2
```

Be sure to wrap the existing expression in parenthesis as shown.

## Modifying the sample Rent Roll with specific categories

**DISCLAIMER:** This article involves *Advanced Customizations*, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

Many people ask for a "rent roll", but we have yet to implement a standard one because everyone seems to have slightly different needs, which would make implementation terribly complex to accommodate everyone. Usually this requires customization, but there are some Sample Queries of rent rolls which might work or be good starting points for many users.

The "Sample Query - Rent Roll (new, filtered categories)" is currently the most advanced option available (added as a sample in version 9.1), which reports like Receipts by Category (older samples simply reports Charges, not Receipts by Category), and also adds columns for Electric and Water. However, this uses specific Transaction Category names which may not match your setup. You may also need to add additional category columns.

First of course, you need to Import the sample mentioned. See the documentation for details:  
<http://campgroundmaster.com/help/queriessetupdialog.html>

Once you've imported the sample, you can Edit the query. You will see a list of columns, including things like "Daily", "Weekly", "Monthly", "Water", and "Electricity". Those are the ones that are category-specific. For instance, the "Monthly" column will use the category named "Monthly Rate".

**Changing the category name:** A simple change would be to change the category name -- for instance it you use "Monthly Rent" instead of "Monthly Rate". Select the "Monthly" line, and click Edit Column. You will see "Monthly Rate" in the 2nd line of the Field/Expression box -- click there to put the edit cursor there and carefully change the name as needed. Be sure to leave the quotation marks in place! Nothing else should be changed. Click Save when done.

**Adding a new category:** To add a new column, select an existing one, e.g. "Daily", and click Copy Column. A new copy will appear at the bottom. Select it and click Move Up to get it where you want it. Then follow the instructions above to change the category name. Also change the "Column Heading" field as needed.

**Combining categories:** This is where it gets tricky. Say for instance that you have categories "Lot Rent" and "Slip Rent" that you want to both include in the "Monthly" column. Now you need to have it do some math to add the 2 categories. Hopefully you're good at "copy/paste" operations to copy text, so you don't have to type so much. So, here's the beginning of the initial expression for the "Monthly" column:

```
LoopSum(1,NumTran(Resv()), "<i>", '-TranPmtAmtForCat(ResvTran(<i>), "Monthly Rate", .F., .T.)',
```

(I'm leaving out the rest for brevity)

The important part is:

```
'-TranPmtAmtForCat(ResvTran(<i>), "Monthly Rate", .F., .T.)'
```

You need to add 2 different categories (but actually each must be negative), so with the new category names that will change to:

```
'-TranPmtAmtForCat(ResvTran(<i>), "Lot Rent", .F., .T.) -  
TranPmtAmtForCat(ResvTran(<i>), "Slip Rent", .F., .T.)'
```

**Important!** The single-quote characters must appear only once, at the start and end of that segment. Also, if these are showing more than one line, don't actually press Enter anywhere in the expression. And of course, that's not the entire expression. The rest should remain unchanged.

You can add any number of categories the same way. Just make sure you're inserting each part inside the single-quote segment, separated by " - " (a minus sign with spaces on each side).

Hopefully this will help you create the Rent Roll you need.

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## Newsletter #47 (Feb 4, 2019)

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### 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

Dropbox / OneDrive / Google drive Warning!  
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### What's New

#### Dropbox / OneDrive / Google drive Warning!

We've encountered several instances of customers opening the Campground Master database directly from a cloud drive like DropBox, Google drive, Microsoft OneDrive, etc. It sounds like a convenient way to be able to access it from other locations, but this is a **big mistake!** For the same reasons that the database can't simply



be shared across the network, this is guaranteed to cause data loss and/or corruption of the database! Changes made by one person will be overwritten by another person accessing the same file -- possibly losing days worth of information, with no possible way to retrieve it. There is no way to merge the changes when the database is shared in this way.

### **Just don't do it!**

The only officially supported location for your database is in "Public Documents". If you're not sure whether you're currently using the database in the correct location, go to File / Open previous database. The first entry should start with:

**1 - C:\Users\Public\Documents\Campground Master\.**

(Don't click on it, just verify that it shows the correct location.)

If it does not show that, please contact support and we can walk you through verifying the location and moving it if necessary.

If you want to keep a backup on a cloud drive, use the "Secondary backup path" option mentioned in this article.

### **Secondary auto-backup location**

A new "Secondary auto-backup path" setting has been added in version 10.0, which allows you to have Campground Master automatically make a backup each day to someplace other than the main database location. This can be used to have backups automatically go to a cloud drive, external drive, or a networked computer, for instance. Previously this required programming an Event Action (through Advanced Customizations), but now it's as simple as entering the folder location.

To use this, go to Maintenance / Program Options, and click on the "Database" tab. Enter the full path desired in Secondary auto-backup path (or use the Browse button). Do not enter a filename -- it will use the same auto-backup filename scheme, which includes the database name and date. These backups will be made at the same time as the normal auto-backups, which is generally when the program is started or the first change is made each day.

Note that it does not auto-delete older backups from this secondary location like it does the main auto-backup location. The user must manage clean-up themselves if needed. Also note that this setting is computer-specific (you can set it on one or multiple workstations, e.g. to back up to even more locations, but you must set it up again if you change computers).

## **Q & A**

### **Finding an old receipt**

**Q:** How do I quickly find an old receipt to reprint? I can find it under raw data, but it is not in a printable version.

**A:** As of version 11.0, there is a "Find Receipt" function under the Transactions menu which should be able to locate it easily (in previous versions, this was only available for P.O.S. receipts). Simply use that function to look up the receipt/invoice #, or by date and description of a transaction in it, etc. This will list matching transactions. (See below for older version notes.)

Once you find the transactions and open it, if it's for a Reservation then you will get the Transactions dialog showing all of the reservation's transactions, not just that "receipt". However you can use "Print Only Some transactions" with the Date Range selected if you need only a particular day's transactions, for instance. That's as close to a "specific receipt" you can get.

**Notes for older versions:**

It depends on how much information you have about it. If you have reservation or customer information, you could use Find Reservation or Find Customer, and from the Resv/Cust Details go to New/Edit Transactions.

If you know only the receipt #, use the Transactions tab in Details mode (it helps to know the date so you can show only that date, which you can get from Raw Data Tables if you've already found it there):  
<https://campgroundmaster.com/help/detailtransactions.html>

Make sure the Receipt # (or Invoice #) column is showing (see Detail Options).

Once you locate it, right-click and select Transactions to get to the transactions dialog where you can print a receipt.

Note that in versions prior to 10.0 it's not possible to exactly print an "old" receipt, e.g. for a reservation or customer, if later transactions have been added already. In 10.0 and later versions you can use "Print Only Some transactions" with the Date Range selected if you need only a particular day's transactions, for instance.

**Can't edit transactions any more**

**Q:** As a Manager, I used to be able to change details of a transaction after entering it, but with version 10 I cannot.

**A:** There's another Access Level that is overriding the normal Access Levels for editing date/time/etc for current or past days (as it should, but it wasn't properly overriding in the old version) -- the Access Level "Edit manual transactions once saved" is set to Administrator by default. In order for a Manager to make ANY changes to a transaction once saved, this needs to be lowered to Manager (see Maintenance / Park Setup / Access Levels). Then it will use the more specific levels for whether they can be changed for the current day or past days.

**Can't use tabs without logging in**

**Q:** In previous versions we were able to scroll the Rack view or On Site, etc. without logging in to the system. This was handy for night staff, for instance, to quickly see who should be in the park without requiring a login. Is there any way to get that back?

**A:** This was a security enhancement added in v9.2, requested by some users. (Previously it was assumed to be in a "Guest" level if nobody was logged in, which did allow some functionality.) Since this change has been an issue for some users, version 10.0 added a new access level setting "(logged out)", so you can allow access to the tabs (or in fact any function in the Access Levels settings) with nobody logged in.

To change the Tab views to allow movement (but not much else) without logging in:

1. Go to Maintenance / Advanced Customizations / Tab Views.
2. Select the tab view of interest and click "Edit tab view".
3. Change the Access required to view to "(logged out)".
4. Click Save.

Repeat for each tab view needed, and then Close when finished.

## Temporary manager override

**Q:** Sometimes when in the middle of a transaction, I need to do something like a Void or fix a transaction detail but it says I need a higher access level. In order to do it, I have to get all the way back to the main screen so the manager can log in, then find what I was working on to continue. Is there a way to have the manager log in without getting all the way out?

**A:** A new feature was added in version 10.0 for this. It's only available on certain dialogs, but should cover any case where it's needed, like Reservation Transactions, Enter Payment, POS Sales Entry, etc.

To use it, right-click in the caption bar of the dialog (e.g. where the little camper icon is next to the dialog title like "Reservation Transactions"), and select "Temporary Operator Override". That will allow someone to log in for this function only -- after leaving this dialog, it will revert to the previous operator automatically.

## Removing details from credit card slips

**Q:** The new credit card slips have so many lines on them that don't seem necessary. Is there a way to get rid of that new stuff?

**A:** When using either X-Charge XpressLink or Cayan's Genius platform for processing EMV cards (chip cards), many additional "EMV fields" are provided in the results of the transactions. As of version 10, however, you can select which fields are actually included on the receipts. (Please contact your credit card provider to make sure you don't remove anything that will open you up to liabilities).

Access these selections by clicking the ["EMV fields on receipts"](#) button through either the XpressLink Settings or the MerchantWare Settings dialogs (through Maintenance / Credit Cards / Processing Setup).

Some of these fields are required, and some are not strictly required but recommended. By default, all of the recommended ones are selected. Change the selections as desired by Shift-Clicking to select or deselect each item.

Custom Forms Note: If you're using custom versions of the receipts (through Advanced Customizations / Forms), the script "RcptCCEMVInfo" must be replaced to recognize these selections. To do this:

1. Go to Maintenance / Advanced Customizations / Forms
2. Locate the script "RcptCCEMVInfo" (if there are others with (copy 1), etc in the name ignore those -- in fact they should be deleted).
3. Edit that script and change the name (e.g. to "RcptCCEMVInfo old"), and save it.
4. Click "Import scripts", and you'll get a typical Windows file-open dialog labeled "Import Scripts".
5. You need to locate the Samples folder, which is typically C:\Program Files (x86)\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 C: drive first using the "Look In" drop down at the top).
4. Now select the file "Sample Scripts - New RcptCCEMVInfo", and click Open. if you get a warning that some files were renamed, then you didn't properly rename the original one in step 3 above. You'll need to make sure the original one is renamed or deleted, and make sure the new one that it added to the bottom has correct name (remove the " copy 1" from the name -- make sure there's no space left at the end of the name).

Now your custom receipts should use the EMV field selections properly.

## **Tips & Techniques**

### **Adding a Date column for transactions on E-mail receipts**

The date of each transaction isn't included in the default E-mail forms because it reduces the room available for the description, unless you start using a wider format.

However you can create a custom version that does include the Date.

First you need to import a sample "Custom" version that is equivalent to the one you want to modify. See the documentation here for general instructions importing and changing the E-mail forms:  
<http://campgroundmaster.com/help/importingandeditingsamplef.html>

For instance, the file that copies the Confirmation E-mail with a transactions table is "Sample Forms - E-mail confirmation with transactions v9.1". Or if you want the E-mail Receipt, use "Sample Forms - E-mail receipt with transactions v9.1"

Once you import an appropriate custom version, follow these steps:

Edit the form, and locate the "Transaction Table" element near the bottom of the form, Edit that element, and change the column size for Date to something other than 0 (e.g. at least 9, and may need to be larger depending on the date format you're using in Program Options / Formats).

You may also need to increase the width of the Email form in general (# characters), as well as the table element:

1. In the Transaction Table element (Edit Form Element), where it shows Right: Relative (height/width), increase that by the number of columns you're using for the Date.
2. Back on the Edit Form Definition page, change Character columns to the same number of columns. used above.

### **Reporting revenue for just online reservations**

If you're using a special How-Heard or Resv Type for the online reservations, then you could use that in the Transaction Report filtering (More Filters, Site/Reservation filtering).

Otherwise, the only way to recognize online reservations is to check the Online ID to see if it has something in it. For this you have to create a Query. Rather than create a whole separate report for this, one option is to simply add Query to the On Site tab view that has an appropriate condition in it.

If you're familiar with importing sample Queries, there's already one that has this set up (as of version 10.0) : import the file "Sample Query - Has Online Resv ID".

Otherwise, you can make a simple Query yourself:

1. Go to Maintenance / Advanced Customizations / Queries. Click Add Query, and select "List Query". Enter a name, like "Has online ID". Make sure Base Table is "Reservations".

2. Click "Edit Filtering Conditions", "Add New Condition", and enter this expression:

`Reservations:Resv_Online_Request_ID != ""`

3. Now Save back to Edit List Query Definition, click Quick-Add Fields, and add the "Online ID" field (press F1 if you're not sure how to select a field there). Save the Query.

Now once you have that Query created or imported, go to the On Site tab view, click Options, and select the imported query for "Query to add with additional info". You'll also need to select the "Total paid" field in the Options, if that's what you're looking for.

**Important:** Remember that as long as this additional Query is selected, the On Site tab will ONLY show online reservations. To revert to normal operation, go back to Options and remove the Query selection.

### Meters - Handling different numbers of digits (revisited)

In previous versions, you had to add a separate Park record to handle sites that had different numbers of digits in their meters. As of version 10.0, there is an alternative. You can override the meter wrap-around numbers on a site-by-site basis.

(If you do not yet have version 10.0, you can view the article from Newsletter 20 here for the previous method used: Meters - Handling different numbers of digits)

Before setting different numbers, you will need to enable the appropriate fields. In [Maintenance / Park Setup / Site Fields](#), enable "Override Meter wraps" and also the appropriate wrap fields for the meters you need to use ("Wrap Electric Meter", etc)".

Now go to [Site Details](#) for the site you need to set up and click on the "Meter Wraps" button to select the "Override" option and set the wrap numbers for this site. Tip -- put the most commonly used wraps in the Park record, to minimize the number of sites for which you have to enter individual settings (you only have to use the "Override" option on sites that are *different* than the Park Setup values).

### Different Check In and Check Out times for some Sites - revisited

In previous versions, you had to add a separate Park record to handle sites that had different Check In or Check Out times. As of version 10.0, there is an alternative. You can override the times on a site-by-site basis.

(If you do not yet have version 10.0, see the previous article from newsletter 41 here: Having 2 different check-in or check-out times)

Before setting different times, you will need to enable the appropriate fields. In [Maintenance / Data Field Definitions / Site Fields](#), enable the fields "Override Checkin/out", "Checkin Time", "Checkout Time", and "Checkout same day".

Now go to Site Details for the site you need to set up and click on the "Check in/out times" button to select the "Override" option and set the times (and next-morning option) for this site.

Tip -- put the most commonly used times in the Park record, to minimize the number of sites for which you have to enter individual settings (you only have to use the "Override" option on sites that are *different* than the Park Setup times).

### Reservation restriction - 3-day minimum stay

A commonly desired restriction is something like a 3-day minimum stay on a weekend, or in particular on certain holiday weekends. Prior to version 10.0, this required some variation of Dialog or Event Actions to

show a warning, or Rates to make sure it charged for 3 days anyway, but to absolutely prevent it was nearly impossible.

Version 10.0 added Reservation Restrictions, making it very easy to add such restrictions. Here are a couple quick examples.

To set up a 3-day minimum stay on weekends:

1. Go to Maintenance / Park Setup / Reservation Restrictions.
2. Click Add restriction.
3. Enter an appropriate Description, e.g. "3-day weekends".
4. For Restriction type, select "Minimum days long".
5. For Minimum # days, enter "3".
6. Uncheck the days of the week at the bottom except Fri and Sat (presumably those nights are the ones to be restricted, requiring either a Thursday-Saturday stay or Friday-Sunday stay).

That's all that's required, unless there are other conditions, e.g. certain sites, certain dates, operator access levels, etc. See the documentation for more details on the rest of the options.

Now let's say that instead of all weekends, you're just requiring a 3-day stay for Memorial weekend (in this case, the nights of Fri May 24th to Sunday May 26th, 2019, leaving Monday May 27th). For step 6, you can leave all days of the week checked. Instead, enter "5/24/19 to 5/26/19" in Season Dates Applicable. This will ensure that if they stay any one of those days, then at least 3 days must be reserved (which would allow a stay of Sunday 5/26 through Wednesday 5/29, instead of starting Friday, since it's still more than 3 days).

What if you want to be even more restrictive, for instance if they stay any one of those weekend dates then all 3 must be reserved? In that case, a different type of restriction is needed. Here's the process (skipping the common steps 1-3 above):

4. For Restriction type, select "Must include a minimum # of certain dates".
5. For Min # days needed, enter "3".
6. For ...on these dates, enter "5/24/19 to 5/26/19".
7. Also enter "5/24/19 to 5/26/19" in Season Dates Applicable.

Now it will require all 3 of those days if any one is reserved (allowing any additional days as well, of course).

### Color-coding reservation restriction violations

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

The new version 10.0 Reservation Restrictions feature is handy for catching problems with new reservations, for instance 3-day minimum holiday stays. However it can be even better to be able to notice any issues with reservations already added, either because they were added before the restrictions were implemented, or because the restriction was bypassed with a higher access level.

You can add a Color Scheme rule for this, so for instance they will show up in Red on the Rack or other tab views.

1. Go to [Maintenance](#) / [Advanced Customizations](#) / [Color Schemes](#).
2. If you already have a custom Color Scheme set up for reservations, select it and click "Edit scheme definition". Otherwise, 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 "Add Color Rule", or if editing an existing scheme then select the first rule and click "Insert Rule" to put the new one at the top.
5. Enter a Color Rule Name, e.g. "Fails Restrictions".
6. In the expression editing area (big white box), enter this expression exactly:

```
!ResvCheckRestrictions(Resv(), 0, .F., .T., .T., .T., .F.)
```

Don't worry about what all of this means for now -- basically this is telling it to use the color if the reservation fails any restriction or warning for any operator, but not actually pop up a message about it. Just make sure you enter it exactly as shown -- don't forget the exclamation at the front, don't insert any spaces before the parenthesis, and make sure all periods and commas are exactly as shown.

7. Use the [Change Text Color](#) and/or [Change Background Color](#) buttons to set an appropriate color for these (e.g. red background, black text).
8. 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.

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## Newsletter #48 (Feb 2, 2020)

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### 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**

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Fixing Reservations Split/Linked incorrectly

## **What's New**

### **New guides for Reports, Transactions, and Taxes**

We have greatly expanded the documentation of 3 different topics that new users commonly have questions about. Seasoned users may also find them to be helpful reviews.

**Reservation Transactions** -- Lots of basic information in case you're not sure the best way to enter charges and payments, with details on all of the different ways to get to the Transactions dialog (and when to use each one), how to enter transactions once you get there, how to print a receipt, etc.  
<https://campgroundmaster.com/help/transactionsreservations.html>

**Common Reports quick-reference** -- A list of the most commonly needed reports and how to get to them, in the categories of Financial, Statistical, and Reservations.  
<https://campgroundmaster.com/help/overview5.html>

**Taxes Setup, Usage, Taxable Sales reporting, and more** -- Much more comprehensive and detailed information about using the Taxes functionality. This updates and combines several previous articles into one location, and adds more detailed information about proper setup.  
<https://campgroundmaster.com/help/taxessetup.html>

### **Exporting to QuickBooks 2019 and beyond**

There were several changes made in the QuickBooks 2019 version which caused the importing to not work for most Campground Master users. We have found solutions to all of the known issues. Fixing this will not



require changing your Campground Master version, however you may have to change the Export to QuickBooks mapping and possibly make some changes in your QuickBooks setup as well.

A summary of the issues found and how to resolve them is below. The QuickBooks error message that will show in the "Results" file is also shown for reference.

**Disclaimer:** *The solutions provided below should allow the Import function to work without errors. However, we do not know how the changes might affect your overall accounting and reporting procedures, or how they will affect QuickBooks operations. You will need to determine for yourself if this will cause any further issues.*

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**1. The QB account used for the A/R balance cannot be an actual "Accounts Receivable" QB account type -- the type must be Other Current Asset.**

This will result in the import error:

Transaction split lines to accounts receivable must include a customer on that split line in QuickBooks

**Solution:** Create a special account for this in QB, of type Other Current Asset, and select that account instead (the "Account to use for Accounts Receivable" in the Export to QuickBooks setup).

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**2. Sales taxes must have a QB "Item", if importing tax categories separately (using "Handle taxes separately" in Export to QuickBooks setup). In addition, these Items should all be different.**

If you didn't select an Item in the Taxes Mapping, you will get this error:

There is an invalid reference to QuickBooks ItemSalesTax "" in the SalesReceipt.

If you selected the same Item for more than one category in Taxes Mapping, you will get an error like:

There is an invalid reference to QuickBooks Item "taxitem" in the SalesReceipt line. QuickBooks error message:

You cannot use the same tax item in both the line items and the txn tax

**Solution:** Make sure an appropriate Item is created in QB for *each* sales tax category (each category seems to need a different Item, even if going to the same Account). Make sure the "Sales Tax Item" type is selected for the items. Edit your Taxes Mapping to include the item for each category.

**Additional note:** This can also be caused by having one of the Tax Items you're mapping to as the "most common sales tax item" in QuickBooks (apparently it can add that to sales receipts by default, causing a duplication). In QuickBooks, see Preferences; Sales Tax; Company Preferences, "Your most common sales tax item" drop-down. One solution would be to create a fake item in QB and select that fake item as "most common tax item" in that QB setting so it's different than any used in the export mapping..

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**3. QuickBooks will try to automatically calculate taxes on the sales receipt after importing, even though the export already includes the taxes, which causes an incorrect non-zero balance on the entry and will also often result in an error.**

This will usually report the error:

QuickBooks error message: Transaction amount must be positive. [3180]

(but also see issue #5 which can create the same error)

**Solution:** This is caused by 2 flags that usually had to be set in previous versions, but now must **not** be set. To resolve this:

1. Remove the "Taxable?" flag on all categories mapped in Transaction Categories mapping.
2. Remove the "Is this an auto-tax rate?" flag on all tax categories mapped in Taxes Mapping (if using "Handle taxes separately").

As a reminder -- To change a mapping, you need to select it in the bottom "Mappings defined" list and click Delete. It will be removed from the bottom list, but it will also be selected automatically in the category/item/account lists above. Then make any changes (e.g. uncheck the "Taxable?" box) and click Add Mapping again. Don't forget to click Add Mapping!

**Note:** Assuming you're using version 10.0 (rev.s) of Campground Master or earlier, you may get a warning when adding the mapping that "Taxable?" or "Is this an auto-tax rate?" must be checked (since previous versions of QB required them). You can ignore this warning (click "Yes" to continue, then OK on the reminder). You will have to do this for each mapping corrected.

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**4. Possible additional issue -- We're not sure if previous versions would even have allowed it, but if you are mapping the tax categories through Transaction Categories Mapping (not handling taxes separately) and selected an Other Current Liability account in the mapping for a tax, then this will not work.**

You may see the error:

Sales tax detail line must have a vendor

Of course you will also see this if you *are* using Handle Taxes Separately and did not select a vendor in the Taxes Mapping.

**Solution:** Ideally you would change to Handle Taxes Separately and select the appropriate vendor for each tax item there. If you prefer to keep the taxes mapped through Transaction Categories mapping, then you need to select an Income type account for the mapping, not an Other Current Liability account.

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**5. QuickBooks does not want to import negative amounts to certain asset accounts.**

This will usually report the error:

QuickBooks error message: Transaction amount must be positive. [3180]

(but also see issue #3 which can create the same error)

**Solution:** This may be caused by having a negative total reported on a given day for a given Payment Method -- for instance, if the only entry for Checks was a refund. There are a few possible ways to resolve this:

1. Combine the exports for multiple days so that the total amount in a given Payment Method is positive (e.g. enough payments to cover refunds)
2. Change the date of the negative amounts (refunds) in Campground Master so that they are reported on a day that covers them.
3. Try using a different type of account for that payment method -- e.g. instead of an Asset account, try a Bank account.

Note that these are somewhat a guess -- we're still not completely sure why QB complains about the negative amount, since it didn't cause a problem before, so we don't know if there may be a better solution.

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## 6. QuickBooks does not want to import Quantities for certain account types or items.

This will usually report the error:

QuickBooks error message: You cannot set the quantity for items of this type. [3060]

**Solution:** This is caused by having the option set to include the Quantity, and having some item type that quantities aren't allowed for. If you can tell which item it is, then you could try changing the mapping to an account without an item, or change the item setup in QB. You should also be able to solve it by simply unchecking the option "Show Qty for each charge" in the Campground Master Export to QuickBooks settings.

## Looking for a Cloud system?

There is a lot of interest in "cloud-based" systems recently, where the system and your data are all "online" and operated through a web browser. We have a lot of customers asking us if we have a cloud version or will be moving to the cloud.

The short answer is "no". But what some may not realize is that Campground Master's Networking function can already provide the most desired features of a cloud system, without the main drawbacks (and in our view there are many reasons that using a cloud-based system for a business-critical application is a *very bad idea* -- see the list below).

Our Networking through the Internet provides some of the main benefits touted by cloud systems:

- Operate Campground Master remotely through the internet, with live data synchronization -- basically the same as a cloud system.
- Automatic "off-site backup" of your data in case of a disaster, since you have a copy of the data on a separate computer in a different location, updated automatically whenever you connect.
- The ability to operate or monitor multiple parks from a central location, while still keeping the "main" system at each park for critical operations.

There are a few things it won't do, such as using Campground Master on a non-Windows device like your phone, etc (you can use other methods for that, such as Teamviewer or AnyDesk remote access services). However, there are many general advantages of having Campground Master be on your own computers instead of using a cloud-only system:

- **Always Available** -- your park office is not dead-in-the-water if your internet goes down, keeping you from handling your customers. Even a remote workstation can keep working offline if needed (with some limitations).
- **FAST!** -- No delays due to slow internet, browser delays, the kids watching videos, etc.
- **Inexpensive!** -- Since there are no monthly fees, overage fees or per-reservation fees, your long-term costs are much lower than most cloud-based systems.
- **No Contracts** -- You won't be "locked in" to any lengthy terms. You buy the license once, and you can use it forever or stop any time.
- **Powerful and Flexible!** -- No online system has all of the functionality and flexibility of Campground Master, such as electric/gas/water meter billing and history tracking, monthly rent billing, a detailed Audit Trail, work orders, a Point of Sale option with inventory tracking, cash drawer and pole display support,

multiple printer support, and so much more -- plus Advanced Customizations to extensively customize your system if needed.

- **You Design It!** -- You have full control of the setup. Create your own selection lists, customize fields, configure all of the options, set your rates structure, and tweak reports. And of course you can make changes or expand your park any time without needing to go through support or wait for us to do it.
- **You Own Your Data** -- Your critical data is not located "somewhere out there". It's secure on your computers, and only on your computers. You can't lose your data due to some other company mis-handling it or going out of business, and you won't lose access to it even if you decide to change reservation systems.
- **You Control Updates** -- Cloud systems are constantly changing their look and operation, so you have to keep getting used to a new system (and you have no choice). With Campground Master, we don't keep changing the way it looks or operates. And even if we do some day, you don't have to install the new version if you don't want to.

For more information, refer to the web site's information page:  
<https://campgroundmaster.com/networking.html>

## Q & A

### Re-doing a meter reading

**Note:** If you did not have version 10 installed prior to entering readings, see the old article for Fixing Meter Readings.

**Q.** I entered meter readings and did "Add Charges...", but didn't have the settings correct so it did not add charges as expected. How do I fix this?

**A.** Assuming you have version 10.0 (and already had that **before** entering the readings), then the new Meter History and Undo Readings features will save you. You can do this even if you've already closed the Meter Reading report -- even on a later date (however the default Access Levels settings will not allow undoing readings more than 7 days old, to prevent accidentally undoing last month's readings).

1. Select (click on) the readings you want to undo -- e.g. click on the reading value for all sites in the Meter Report that need fixed (use Ctrl-Click to select multiple).
2. Click the "Undo readings..." button.
3. Confirm the prompt. If any of them did add charges, you will also be asked if you want to undo the charges. This can be helpful if the problem was that it added incorrect charges, e.g. the wrong reading was entered or your Rates were not set up correctly.
4. Now it should show the previous reading for each site. You can simply go through and re-enter the new readings as before (after fixing your settings to add charges correctly of course).

### Keeping it from recalculating after manual changes

**Q:** How can I keep it from automatically replacing charges I've deleted to make adjustments, without always going to Reservation Details and disabling the "Recalculate" option?

**A:** Campground Master knows which transactions were added automatically through Auto-rates, and will always keep checking to see if the correct Auto-rates are present as long as you have the option selected in Maintenance / Program Options / Auto-Rates, "Automatically recalculate charges whenever reservation details are changed". While you could disable that feature, this would stop if from adding new charges or making corrections when it's supposed to, such as extending the reservation or changing to a different-priced site.

The correct way to handle it is to **never** delete the Auto-charges (which are in blue) -- always leave those alone. If you want to make a manual adjustment for some reason, do it by **adding** transactions (Charges or Discounts) to make the price adjustment as needed. Auto-rates ignores any manually-added transactions (which will be in white), so it won't recalculate as long as its original auto-rates charges are still there.

### Moving a security deposit to a new reservation

**Q:** A seasonal resident wants us to hold their security deposit from last year over to the new year, but we make a new reservation each year. How do I move their security deposit to the new reservation?

**A:** There is no way to just "move" transactions, and besides this would cause an imbalance on the old reservation (since they are presumably paid in full now, including the deposit). So this is a 3-step process:

1. In the old reservation, select the original Security Deposit charge (the Charge transaction, not the payment), and click "Reverse Charges". This part is the same procedure as if you were going to refund it. This should leave a credit balance.
2. Go to the new reservation for next year, and enter a new Security Deposit charge.
3. Use "Transfer Pmt" to transfer a payment in the amount of the security deposit from the old reservation to the new one. If you're doing this starting in the new reservation's Transactions, remember you have to select "To" in the top part of the Payment Transfer (since you're transferring **to** this reservation). Then click Find Reservation, and select the old reservation. Assuming it had a credit balance in the amount of the security deposit reversed in step 1, that should be the default amount to transfer. Otherwise enter the correct amount to transfer. Then click Save.

This all assumes that there was a Payment at some point for at least the amount of the security deposit. In some cases that may have been done instead as a Deposit, which can be more problematic since the Deposit was probably already Applied. In that case a Transfer Pmt won't work -- just enter a Refund transaction on the original transaction and a Payment on the new one, which will balance out. The payment method can be Cash or Other method, since it will balance out to 0 on reports anyway.

Note that it's important that you do these steps in this order, so the payment transfer is after the security deposit transactions -- otherwise the Receipts by Category report may report it as Uncategorized.

### Making several reservations for one customer, different dates

**Q.** How do I easily make multiple reservations for a customer, for different dates (e.g. every other week) at the same time? They don't need to be linked, I want them to be billed separately each time.

**A.** There are a few ways you can create additional reservations for the customer. While it's possible to do it all at once while you're in New Reservation, it takes some careful manipulation of the "Linking" options each time you change the dates and select a site, since you don't want those separate stays linked together.

A couple options:

**A1.** It may be easiest for most users to complete one reservation so it saves the customer information, then create additional reservations for them one by one. A few different ways to proceed once the first one is made:

1. If you can see the reservation on the Rack or other tab view, right-click on their name and select "New Reservation for this customer", and proceed as usual. Repeat as needed, going back to the Rack each time.
2. Go straight to New Reservation again (e.g. click the telephone icon), enter the customer's last name and let it Find the customer, and proceed for each one (returning to the main screen and using New Reservation each time).
3. Open Customer Details for the customer, and click New Reservation. Here's a trick -- once you create one reservation and finish (closing all the way back to the main screen), use Ctrl-R to re-open the Reservation Details for the last reservation used, then click Customer Details... then New Reservation. When done it should still be in Reservation Details, just repeat as needed.

**A2:** OK, so maybe you want the more advanced method, for instance to link them as non-synced or non-linked all at once while in New Reservation.

Normally if you try to select the same site again on different dates while in New Reservation, e.g. using Quick-Pick or double-clicking in the grid, you can't do it because it's going to use the dates in the First/Last fields, which are the same as the current reservation, so it reports a conflict. However, you can get around this by using an alternate method to select sites and dates.

1. Click the "Linking" button to choose either "All non-synchronized" or "Not linked at all", depending on your preference. This will lock the linking type for all subsequent sites added.
2. Use **click-drag** in the grid, in the exact site/dates you want, to highlight those cells for the dates needed (usually in blue).
3. Click the "Add Selection" button. That will be added as a new, separate reservation (shown as <NEW> in the cells), linked as selected above.
4. Repeat steps 2 and 3 as needed for additional dates.

## Occupancy shows more than 100%

**Q:** Why does the Occupancy report show more than 100% (or more than the possible number of nights)?

**A:** If you don't specify a Reservation Filter, it will include cancelled reservations, inquiries, and wait-listed reservations. It would also include Owner reservations if you're using those, even if they're not on site, as well as Guest reservations, which would double-up occupancy. Normally you don't want those considered as "occupied", so you need to set a filter (in addition to any other filtering you're doing).

1. On the report dialog, click "Reservation / Site Filtering".
2. In the filter, click "Reset Filtering" to make sure nothing is set by mistake (unless of course you're doing some other filtering on purpose).
3. In the "Reservation Type" list (1st list at the bottom), select all applicable types -- most notably, exclude any Guest, Owner, and Day Pass types.
4. In the "Reservation Status" list (2nd list at the bottom), select only Pending, Confirmed, Guaranteed, Checked In, and Checked Out (you can click-drag from Pending to Checked out to highlight all 5 of them at once).
5. Click OK. Then make sure the 2 boxes are checked below the "Reservation / Site Filtering" button: "Use filtering" and "Save filter to use each time".

Now generate the report (if it's not auto-generating) and you should see the correct results.

### Removing the "default" filter on the Rack, etc

**Q:** The Rack (or other tab) always shows "Default" in the list at the top, and I have to keep changing it back to "All Site Types" to see all of my sites. How do I fix that so it always shows "All Site Types"?

**A:** Someone may have accidentally used "default" to select something, not really intending it to be the new default, and forgot to reset it. You need to reset the "Default" filter so it includes all sites, then it will revert to "All Site Types". So click on the "Default ..." option (which opens the Site filter dialog), click the "Reset Filtering" button, and click OK. The next time you Reset the Rack, it will go back to All Site Types (and it will remember that setting).

Remember, this is specific to each workstation, as well as each tab view, so you may need to do it multiple times.

### Fixing a credit card payment entered on the wrong customer

**Q:** A clerk charged propane and swiped the credit card in the wrong customer account. Is there an easy fix?

**A:** The "simplest" would be if the customer is still available (and it's still the same day), then you could Void the payment and re-do it on the correct account.

If that's not an option:

There's no way to "move" a transaction to another customer, so one option is use Transfer Payment. However be aware that the next payment done on that wrong customer may try to bring up that same card information by default (unless you clear the credit card information from that customer using Maintenance / Credit Cards / Remove a customer's credit card information -- but that would wipe ALL card information from that customer) -- so make a Memo or other note to remind you of that.

The other option would be to Delete the payment transaction (without processing a Void), then re-enter it on the correct customer without processing it. When re-entering it you would need to either use a different Payment Method (like "Other") or disable credit card processing (under Maintenance / Credit Cards) while re-entering it so it doesn't require running the card again. Either way you would lose the card information for the payment (e.g. you may not be able to do a refund or subsequent charge without the card present again).

### Different versions of Confirmation E-mail

**DISCLAIMER:** This article involves *Advanced Customizations*, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

**Q.** How can I create different versions of the confirmation E-mail, with different text, without changing the "E-mail confirmation text" setting each time? I've looked at the Forms but there doesn't seem to be a way to change them.

**A.** In order to make changes to a form or make additional copies, you need to import a "custom" version of the form that actually has elements (the default forms are "canned" versions with no elements to edit). See the documentation for this here:

<https://campgroundmaster.com/help/importingandeditingsamplef.html>

The samples normally pull the confirmation text from the setting you mentioned, but you can change that. Look for the Data Expression element with SettingText( "Main", "EConfirmation"). Replace that with a Text element for the text you want instead of the standard setting -- just Edit the element, change the Element Type to "Text", and then Edit Text to replace the expression with the actual text you want.

## Adding notes to the "Requests" column (Arrivals, etc)

**Q.** How do I add a note to "Requests" on the Departures tab (or Arrivals)?

**A.** You can't put a "note" there -- those come from the "Site Preference" fields of the reservation (also called Attributes). If you want special flags you can set to show up in the "Requests" column, you can customize one or more of the "Attribute" fields to use. Then you would just select that under the Reservation's "Site Preferences" (see the button on Reservation Details), and it would show up in the Requests column.

See "Customizing Attribute Fields" here:

<http://campgroundmaster.com/help/definedatafields.html>

## Tips & Techniques

### Filtering tab views by Reservation Type

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

While you can select Site Types, etc, for a tab view like On Site or Arrivals, there isn't a standard way to filter the tab views by Reservation Type. However it can be done using an Add-on Query. This is part of Advanced Customizations, not normally part of support, but it's pretty simple to do.

While not typically done, you can create a Query that has only a Filter Condition in it, without any actual data columns (of course if you already have a Query that you're using as an "Add-on query" for the On Site tab, then you can simply add the Resv Type condition to it).

For example:

1. Go to Maintenance / Advanced Customizations / Queries. Click Add Query.... it will prompt for the type, select List Query.
2. Enter a name like "Resv Type filter", and make sure the Base Table is "Reservations".
3. Click Edit Filtering Conditions, then Add New Condition. Type the condition as shown below, replacing "Normal" with the desired Reservation Type. Example:



```
Resv:Resv_Type = "Normal"
```

Note: Make sure the punctuation and spaces are exactly as shown (copy/paste from here if possible).

4. Click Save/Done/Close all the way out of that.

5. Now you need to select that Query in the On Site tab view. In the On Site tab, click Options. At the bottom, select the query you added above for the Query to Add.

Now it will only show that Reservation Type. Remember, though, that to get it back to showing all types you need to go back to Options and clear the selection for Query to Add. Of course you can set up as many other Queries as you want, with other Reservation Types or other conditions. Also remember that if you want to add additional fields to the query as well, then this must be combined with the filtering, since only one Query to Add can be selected at a time.

**Important:** For the On Site tab in particular, if you have the option "Include empty sites when sorted by site" selected, and sort by sites, it will **still** show **all** sites even if they contain a reservation that is excluded by the filter -- the filter would simply make them look empty instead of showing the reservation on them. The filter will work normally if you sort by a different column, however, since it will no longer contain empty sites.

## Fixing a double-charge to a credit card

Sometimes you may find that a customer's card was charged twice, but it's only shown once in Campground Master (due to aborted or timed out processing on the first one and not realizing that it really was processed).

Since it was processed again, and the customer was charged twice, there are 2 options for correcting it (these assume that the customer's Reservation Transactions currently show the "correct" amount paid, i.e. a single payment the way you want it to be).

1. You can credit one of the charges directly with the credit card company, and then just leave the existing payment in Campground Master. It doesn't really matter which payment was refunded through the credit card company, except if you need to do a further Refund later -- then it will need to reference the correct payment, so you need to make sure the one canceled is the one missing from Campground Master. This is the simplest way to do it, since nothing needs to be done in Campground Master. The customer's transactions in Campground Master will look correct, but the Receipts by Payment Method report may not match the credit card company's statement if it wasn't all done on the same day (Campground Master won't show both charges to the card and won't show the refund).

2. If you don't want to do the credit directly with the card company (or don't know how), then you can do it through Campground Master -- but then you need to add another Payment transaction to make things match up. This takes a few steps.

a. Disable credit card processing (uncheck the "Enable" box in Maintenance / Credit Cards / Processing Setup).

b. In the Reservation's Transactions, enter another Payment for the same amount -- select the credit card payment method. Don't enter a card number, and just Save it (there won't be a "Process Card" button). Now it should show a credit (negative) balance for the amount you need to credit their card.

c. If necessary, back-date the payment you entered to the proper date (when the duplicate payment was actually made).

<https://campgroundmaster.com/news/back-datingtransactions.html>

d. Move the new payment you entered so it's ABOVE the payment that was already there and processed correctly. To do this you need to exit out of Reservation Transactions, go to the Reservation Details for that reservation, click "Transaction History", and move up the transaction. This is important so that the Refund step below will refund the correct payment (the processed one, not the one that you just entered without processing).

<https://campgroundmaster.com/help/transactionhistorydialog.html>

e. Re-enable credit card processing (re-check the "Enable" box in Maintenance / Credit Cards / Processing Setup).

f. Go back to Reservation Transactions for that reservation, and click "Refund" to refund the credit card payment to their card (or if this was all on the same day so it has not settled, then use "Void selected credit card"). Make sure you can "Process" the refund or void -- If not, then either you didn't re-enable credit card processing or you don't have the processed Payment as the most recent payment. This will credit that one payment back to the customer's card.

Now it should report correctly in Campground Master and also match the statement from the processor.

## Fixing Reservations Split/Linked incorrectly

**Note:** As of version 10.1, there are new functions to manage linked reservations (link existing reservations, and unlink reservations). These may also help resolve any issues if your case is not detailed below. See the new documentation here:

<https://campgroundmaster.com/help/managing-existing-linked-reser.html>

We often get questions about fixing a "mess" where a customer has 2 or more reservations, perhaps as a result of doing a Split or correcting a bad split, or perhaps instead of doing the normal Split operation the operator added a Sub-member or even a whole new reservation instead. Usually the issue is because the Transactions do not show any more, or maybe they show up but the wrong site # is showing on the receipts.

A previous newsletter article mentioned one way to fix this:

<https://campgroundmaster.com/help/fixingmessed-upreservations.html>

Here are a couple more takes on fixing situations like this -- you may need to experiment with different methods, since the "right" way depends on exactly what was done before and what the situation is now.

### **"Simple" situation -- transactions are there, but wrong site showing on receipts**

First, go to Reservation Details, drop down the Linked Reservations list to figure out which is the master. The asterisk indicates the one that you're looking at NOW. However, the Linked Master is the first one listed (it also shows "Linked master")

ALL transactions for a linked set of sub-members are typically on the Linked Master. So you cannot delete or cancel the linked master without losing the transactions. Having the old one be the linked master is usually caused by using "Split Reservation" but not selecting the Recommended option of making the first (old) part the sub-member. That leaves the old part as the master, with the transactions (or worse yet, choosing an option where they are not sub-members, so the transactions don't show up on any of the others).

The best (and probably only) way to correct it is to:

1. Delete the non-master reservation (e.g. the current reservation, if it's not the linked master). You may also need to delete any others that aren't the linked master, e.g. that may be in the way of doing corrections to sites/dates.

2. Go back to the Reservation Details of the linked master and change the Dates and Site on that one to what the "current" one should be, so it's current again. You'll probably need to put it back to Pending so it allows changing the dates and Site (if checked out, go back to Checked in first, then back to Pending).

3. Once you get it back to where you only have one reservation, for the "current" site and dates, and it has the transactions -- In Reservation Details, use Add Sub to add the older site/dates as sub-member reservations. Of course this is optional, since past history may not matter to you any more.

### **Another take -- transactions missing or on the wrong reservation:**

You may find that the transactions are actually on a reservation that was Canceled (e.g. in an attempt to correct things that were messed up). To find out, go to Customer Details, and then Reservation History. Look through each of the reservations listed that seem to be in the right time frame, especially if they have a Balance you're looking for. See if it's Canceled, or Checked Out, or in some other way seems to be incorrect.

If you need to get the transactions back to a reservation with normal status and correct site/dates, it generally requires changing the one with the transactions to be the "good" one, regardless of its current status.

1. Clear out any reservations that are "in the way" (e.g. conflicting sites/dates of what you need) but don't have transactions on them -- go to Reservation Details of each one and Delete Reservation.

2. Go to Reservation Details of the one with the correct transactions.

3. Change the Site and Dates as needed to get it back to the "current" stay.

3. If it's canceled, uncheck "Canceled" to put it back to Pending.

4. Then check "Checked In" to check it back in (be sure to answer prompt to keep original dates).

5. Once you get it back to where you only have one reservation, for the "current" site and dates, and it has the transactions -- In Reservation Details, use Add Sub to add the older site/dates as sub-member reservations. Of course this is optional, since past history may not matter to you any more.

## **Newsletter #49 (Feb 27, 2023)**

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### **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**

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GMail, Yahoo, Office365 and other E-mail service changes

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**What's New****Version 11.3 (rev.a) PATCH released**

On January 9th, 2023, version 11.3 was released. We quickly discovered that there were some critical issues with it when sending E-mail confirmations, etc, as well as a couple other minor issues, so we released a patch release (rev.a) the next day.

**Please check your version shown at the top of Campground Master** -- if it shows "**ver. 11.3**" but does not show "**(rev.a)**" after that, be sure to download the new version as soon as possible. This is easily done through [Help / Check for Updates](#) -- just click the "Download..." button and it will download the new version and install it automatically (easier than ever).

If you are eligible for 11.3 but have not yet updated (use the [Help / Check for Updates](#) function to check), we strongly recommend that you do so. Nothing will change in the way the program looks or operates, and your data will be preserved.

See here for release notes detailing the changes:  
<https://campgroundmaster.com/releasenotes.html>

Also note that if you did not receive the release notices on January 9th and 10th but would like to receive future notices, please let us know so we can add the appropriate E-mail addresses to our distribution.

**GMail, Yahoo, Office365 and other E-mail service changes**

Most of the more popular E-mail services are changing their requirements for using through a 3rd-party application like Campground Master. If you haven't already made the required changes, you may suddenly find that you can't send E-mail from Campground Master when they "transition" your account to the new requirements. Assuming you are using a version of Campground Master recent enough to support the needed changes, you can make the changes now to avoid interruption.

**GMail** -- they seem to be making it a requirement to use the new OAUTH2 authentication, so we are recommending that everyone use this since it's easier than trying to keep up with their other security requirements. Version 11.0 or later is required for this. See our documentation for details:  
<https://campgroundmaster.com/help/gmail-settings.html>

**Yahoo** -- They have recently added new settings that are required for using 3rd-party apps, which must be set through your Yahoo account. See our documentation for details:  
<https://campgroundmaster.com/help/yahoo-settings.html>

**Office365** -- They are making it difficult to use 3rd-party applications, but it MIGHT be still possible with some changes in your Office365 settings. See our documentation for details:  
<https://campgroundmaster.com/help/office365.html>

**MS Exchange** -- They are making it difficult to use 3rd-party applications and will be completely disabling basic SMTP, if they have not already done so.  
<https://docs.microsoft.com/en-us/exchange/clients-and-mobile-in-exchange-online/authenticated-client-smtp-submission>

However, we recently heard that if you didn't make these changes before December 31s, 2022, then it's already too late. It will require changes to the Campground Master software in order to use MS Exchange, similar to the changes we made for GMail. Look for this in a future version of Campground Master.

**GoDaddy** -- If you use GoDaddy for your web service and E-mail account, they have switched to using Office365 -- see above.

**Other E-mail servers** -- Most servers are requiring you to use a secure port, usually either 465 (SSL) or 587 (TLS). If you still use port 25, then it may still appear to work but your E-mails may not reach the customer because it will be considered non-secure by the receiving server. So be sure to check with your provider and use the most current settings information. See our documentation for details:  
<https://campgroundmaster.com/help/smtpsendmailsetup.html>

Also note that Campground Master version 9.2 or later is needed for "TLS level 1.2" required by most E-mail servers now.

## Q & A

### How To Check Out Reservations in Bulk

**Q:** We have not been using "Check Out" on reservations regularly but would like to do things properly from now on. How can I fix all of the old reservations to be checked out?

**A:** As of version 11.0, an "Auto-checkout" function was added to check out multiple past reservations at once (version 11.1 fixed some initial issues with it).

To use it, go to the Departures tab, and enter a date range for the Last Night of the reservations you want to check out. Then right-click anywhere in the list, and select "Auto-Checkout All Shown departures (Any dates)".

Of course you can also use the Auto-Checkout functions to just checkout today's or yesterday's reservations, if you prefer to do the check-out's all at once each day rather than individually. Refer to the documentation for details:  
<https://campgroundmaster.com/help/departures.html>

### Correcting a payment entered on the wrong Customer

**Q.** I accidentally entered a credit card payment on the wrong Reservation (or Customer). I don't want to have to refund it and re-enter it -- how can I get it on the correct Reservation?

**A:** A new function "Move Transaction" was added in version 11 to allow moving existing transactions to any Customer or Reservation record. This can also be used to move charges, etc., not just payments.

**Note:** Be aware that this can also affect reporting for the dates of the transactions moved!

To access this function, open the Reservation Details (or Customer Details if appropriate) of the transactions you need to move. Click the "Transaction History" button. Locate and highlight the transaction(s) to be moved, and click the "Move to a different Reservation or Customer" button. You will then just need to select the Reservation or Customer for the destination.

More details:

<https://campgroundmaster.com/help/transactionhistorydialog.html>

## Keeping a credit card from being used again

**Q:** A guest used a temporary credit card for payment that he doesn't want used for future payments -- how can I keep that one card from coming up again?

**A:** In general, you can clear *\*all\** credit card history for a specific customer (so none of the cards previously used for that customer will be shown again) through Maintenance / Credit Cards / Remove a Customer's credit card information. However if you don't want to clear all previous cards, a new option was added in version 11.2 to allow blocking a single card (or more specifically, a card used in a single payment). It's also reversible if you change your mind.

To use this, go to the Reservation Transactions (or Customer Transactions) where the payment was entered so you can see the transaction. Select the payment in question (click the transaction line so part of it is highlighted), and then there will be a button at the bottom "**Don't Re-Use This Card**". Click that button, and then a confirmation prompt will appear (click Yes).

It does not completely remove the card information, since the information must still be available for Void or Refund transactions, or to re-enable usage. It is simply flagged so it won't be used in the next payment (Campground Master will keep looking back for the next most recently used card). If the payment has already been marked as "Don't Re-use", then the button will allow you to reverse this and "Do Re-use" it for future payments.

Be aware that it only flags *that* transaction -- if the same card was also used in other transactions on that Reservation or Customer, or is in the Guarantee info, then it will still be found. You must flag *all* transactions (one at a time) that would have the card you want to avoid re-using (or do a transaction with a different card, which will take precedence since it's newer).

## Why aren't customers getting the E-mails we send?

**Q:** When we send an E-mail to ourselves or do the Test, we get it. But when we send an E-mail to a customer, it shows that it was sent but they don't receive it. How can we fix that?

**A:** Unfortunately this is an all-too-common occurrence these days with hyper-active spam filtering, but it could also be that their service provider is blocking them because they see something suspicious about the E-mail (e.g. your provider's IP address is on a black-list, or other issues as mentioned below). You may want to contact your SMTP provider (web host) to see if they have any suggestions.

There's nothing specific about Campground Master that would cause this, any more than there would be with another E-mail program -- however it could be due to the SMTP settings you're using (see below). There isn't anything we can do to diagnose this kind of issue, since the E-mails are going out successfully. It's up to the recipient's E-mail service to decide whether it's spam or not, and all you can do is try to minimize the red flags.

**Some suggestions:**

One common thing that makes E-mails look suspicious is if you have a domain/E-mail mismatch or you're not using a **secure** port with SSL or TLS. Make sure you're not using port 25, which is not secure and your SMTP server may reject outgoing E-mails sent through that port. (Contact your provider for a secure port). Also make sure that either "Use SSL" or "Use TLS" is selected, depending on which port you use (again, contact your provider if you're not sure).

Make sure your "reply to" address matches the domain you're sending it through (the host name/address in SMTP setup). For instance if you're using a GMail SMTP server, you Reply-to must be your GMail address. If using an SMTP server for your internet provider (e.g. Comcast), then you must have a reply-to with the E-mail from your provider, e.g. something@comcast.net. If using a Reply-to address with your own domain name, you must use the SMTP server specified by the web host that is hosting that domain name.

Also make sure that if the option is selected "Use the appropriate Park's E-mail", then you need to check the E-mail address in Maintenance / Park Setup / Parks to make sure it's what you want (we recommend NEVER selecting that option unless you have multiple Parks set up needing to use different business E-mail addresses).

If you're using your own domain name and the corresponding SMTP server for the domain, contact your web/domain host about setting up SPF and DKIM records. This helps verify your E-mail as legitimate. You can search Google for more information.

It could also be that there is something suspicious-looking in the E-mail text, such as a link to non-secure web site or wording that sounds like a solicitation -- but that should only affect a few recipient servers, and usually results in a bounce response from the server rather than just disappearing.

Sending batch E-mails (or sending a lot of similar E-mails in a short period) can also cause E-mail providers to start blocking you as suspicious activity.

That's all we can suggest at this point. There isn't any sure-fire way to prevent this (or if there is, we would like to know about it too!)

See here for more details about settings:  
<https://campgroundmaster.com/help/smtpsendmailsetup.html>

**Refund getting "Exceeds Sales Cap" error**

**Q:** I'm trying to refund a credit card payment but when processing it gets an error like "Cannot Exceed Sales Cap". How do I fix that?

**A:** All credit card Refunds must be processed with reference to a specific processed Payment transaction, and the refund cannot be larger than the payment (or possibly some maximum "cap" determined by your payment processor) -- this is to comply with new credit card fraud prevention rules requiring the original transaction reference for refunds. You can't do "blind" refunds to a credit card any more.

By default, this is the most recent payment (the lowest in the transaction list). As a result, if the total refunds done using that Payment are larger than the amount of that payment, you will get an error similar to "Exceeds sales cap". Therefore you may need to select a payment other than the most recent payment to reference for the refund. It may also be necessary to do the refund in multiple parts not exceeding the amount of each payment, if no single payment is large enough (or has a not-yet-refunded balance large enough) for the needed refund.

So if you're getting this error you likely need to select a different payment than the most recent one. To do that:

1. Click on the payment transaction line to select (e.g. on the word "Payment" or "Deposit") in the Type column of the transaction you are trying to refund -- do NOT click on the "Payment" or "Deposit" button.
2. You will see the word you clicked on highlighted, usually in blue. If not, then you didn't click in the right place.
3. Click the **Refund** button to open the Refund dialog, and enter the amount to be refunded from that payment.

If some of the selected payment has been previously refunded, then the amount available to refund from that particular payment will be reduced accordingly. For instance if you had a payment of \$100 and already refunded \$60 from it, then you can only refund the remaining \$40 from it. Any additional amount would need to be refunded from a different payment -- repeat the process as needed, selecting each payment to take some of the refund from.

**Note:** This requires version "10.0 rev.g" or later, otherwise it will always use the last credit card payment for reference, or possibly not use any reference at all.

Note that if the credit card has expired, then it cannot be used and may not appear as the card being refunded. Likewise, if the customer's credit card from the original payment is no longer active, or if you have changed credit card processing services since the payment was done, then the refund transaction will fail and you will need to refund the customer in some other way.

## Receipts not showing the amount or correct date

**Q:** Our receipts and credit card slips on the 3" printer aren't showing the dollar amounts (and/or not showing the correct transaction time).

**A:** This is usually due to the printer settings not being correct for 3" paper -- the amount is being "printed" but is simply too far over to the right to see, and the time you're seeing is probably in the credit card details (not the receipt time-stamp), which is the UTC time for credit card auditing purposes, not the local time.

1. You need to set the correct paper size for the 3" printer. If it's set for normal letter size paper, it will space things accordingly -- then everything to the right of 3" is getting chopped off. Fix this through [File / Printer Setup / Receipt Printer \(3" paper\) - Using a Windows Driver](#). Select the correct paper size for 3" wide paper, which is typically something like 78mm wide.

<https://campgroundmaster.com/help/receiptprinterusbdriverset.html>

2. Another way to fix it is to select the "Fixed-Pitch" version of the credit card slip format, so it prints that format instead. See [File / Printing Options / Credit Cards](#) to select this receipt format by default. Then you will get a better version of the slip and the paper width settings won't matter.

<https://campgroundmaster.com/help/creditcardsettings.html>

## Retrieving Online Reservations locks up

**Q:** When I use Retrieve Online Reservations to download E-mailed reservations, it locks up. How can I fix that?

**A:** It can be locking up due to trying to reprocess too many previously downloaded requests, and/or too many E-mails still in your E-mail server. Follow the steps below depending on which is your case:



**If it's locking up only when you click "Retrieve Online Requests"**, or if you just don't want to wait for so many E-mails to download, then you can tell it to delete downloaded E-mails.

1. Go to Maintenance / Online Reservations / Other Online Interfaces / Connections & Options.
2. Click on the E-mail Requests tab, and check the box "Delete messages from server immediately after retrieving them".

The next time you retrieve requests it will still download them all, but then it will delete the messages from the server and after that will only have new messages to download. Keep in mind that this can be dangerous to leave it this way, since if something happens after you retrieve the E-mails and you don't get to save the reservation, then that information could be gone.

**If it's locking up immediately, before you get to click "Retrieve Online Requests"** (or if you just want to get rid of all of the old processed E-mails in the list)...

1. Go to Maintenance / Online Reservations / Other Online Interfaces / Connections & Options.
2. Click on the E-mail Requests tab, and check the box "Ask to re-import previously downloaded requests". Note that version 11.1 is required for this option.
3. Go to Reservations / Retrieve Online Reservations. It will ask if you want to re-import -- answer "No" so it won't lock up processing them.
4. If it's not showing "E-mail" as the Source, select that as usual.
5. Click the "Delete all Downloaded Requests" button to delete the temporary download file containing past E-mails.

Once that is done it should resolve any lock-up issues -- you can go back to the Maintenance settings and disable that warning if you prefer, but be sure to use the "Delete all Downloaded Requests" function periodically to keep it cleaned up (and also follow the steps above to delete the E-mails from the server occasionally if needed).

## **Tips & Techniques**

### **Color-coding Reservations for special fields**

**DISCLAIMER:** This article involves Advanced Customizations, which can be technically challenging to get working and is **not** part of standard support. This is programming and must be done precisely or the results can be unpredictable. This information is provided as a service for those who have the technical skills to work through it -- we cannot help you solve any issues with getting it working. For more information about Advanced Customizations, see the full documentation:  
<https://campgroundmaster.com/help/overview32.html>

A previous newsletter explained a simple way to add a Color Scheme to color-code new Reservation Types using the "Quick-Add" feature:  
<https://campgroundmaster.com/help/color-codingreservationtypes.html>

However, you may want to color-code reservations based on some field other than the Reservation Type. While you could just add a Color Rule that checks the field, this can lead to problems (e.g. it would always be that custom color even if it's checked out, etc). The rules should still be checking the status of the reservation so it must have a separate rule for each status that should be a special color.

Here's the basic information using the Quick-Add function to get the basic rules inserted, but modifying them for a different field (please refer to the previous article linked above and understand that method before proceeding). **Keep in mind that this is a relatively complicated customization and should not be attempted if you're not familiar with the functions mentioned or have not read the Advanced Customizations documentation. Support will not be able to help you get this working.**

1. Go to [Maintenance](#) / [Advanced Customizations](#) / [Color Schemes](#).
2. If you already have a Color Scheme you're using for Reservations, select that and Edit it to add more rules. Otherwise 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 an appropriate Reservation Type from the list that appears (which also correlates to reservations using the special field you're interested in). 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 Reservation Type that you want to color-code based on the special field, repeat step 4 for each one (they must all be in the same Color Scheme definition). However if you don't need the color for your special field to be different for each reservation type, then you don't need to add each type (see below) -- but you DO need to add at least one type of each BASE type that will be affected (e.g. Normal, Monthly, Group, and Free Stay) because they use different sets of ColorStatusResv() values -- you just don't have to create rules for each type that's the same BASE type.
6. So far the rules are checking the reservation types, but you need to edit the rules to add your special field check. You will see a series of rules that look something like:

```
ColorStatusResv(Resv(),ThisDate(),ThisPeriod()) = 28 AND Resv:Resv_Type = "Normal"
```

Double-click on each Rule (line in the table) to Edit the Rule

- The first part, before the "AND", must not be changed.
- If (and **only** if) you don't care about the specific Resv Type for the color (all Types of the same base type will be the same color if your special field condition is met), then you can remove everything after the AND. Otherwise, add another AND (make sure you have spaces around the word AND).
- Now Add a condition expression for your special field. The format depends on the field type -- you will need to understand Expressions and conditions (refer to the Advanced Customization documentation for details). Here are a few examples:

If it's a text field or list, like Discount Used:

```
Resv:Resv_Discount_Used = "Military"
```

If it's an Attribute field, like 50A:

```
Resv:Attrib_50A = "Must Have"
```

If it's a Boolean field, e.g. one you added yourself:

```
Resv:Resv_User_WiFi = .T.
```

So for instance the resulting rule will look like:

```
ColorStatusResv(Resv(),ThisDate(),ThisPeriod()) = 28 AND Resv:Resv_Type =  
"Normal" AND Resv:Resv_User_WiFi = .T.
```

...or if you didn't need a specific Resv Type, you can remove that part:

```
ColorStatusResv(Resv(),ThisDate(),ThisPeriod()) = 28 AND Resv:Resv_User_WiFi =  
.T.
```

**Note:** Ignore the "28" value in these examples! This will be different for each rule and corresponds to the specific reservation status for that color -- do not change it!

Repeat for every Rule that was added.

7. 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.

**8. IMPORTANT** -- 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.

## Handling credit card chargebacks

Campground Master doesn't have a specific function for handling the situation when a credit card payment is "charged back". To record the charge-back from the credit card company (deducting the payment from the customer's account), here are 3 possible options:

*You will need to have the appropriate level of operator access to delete a payment or enter a negative payment amount, at least Manager or possibly Administrator.*

1. If don't care about reporting or date-correctness, you can simply Delete the original payment transaction.
2. If you want it date-correct but don't need it to specifically come out of your "Payments" reports (or credit card account for exporting to QuickBooks), you can just enter a "Charge" transaction for the charge-back amount (perhaps using a new Transaction Category like "Chargebacks")
3. For the most "correctness" in reporting, e.g. if you use QuickBooks or need things to come out of the correct accounts in reports, you can enter it as a "Payment" transaction under the same payment method (e.g. Visa), but with a negative amount (e.g. enter "-100" in the Amount to pay for a \$100 charge-back). You may also want to change the Description of the payment, e.g. add a "chargeback" note to it.

Note that if you are processing credit cards through Campground Master, you must disable credit card processing first (see Maintenance Credit Cards / Processing), so you can Save that payment without processing (and don't forget to re-enable processing afterwards).

Also note that this will be included on your daily receipts report, so be sure to make a note of it or print out a fake credit card slip to remind you that it's not going to match up with your daily settlement.

## Excluding customers with an E-mail address from lists (Mailing labels, etc)

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<https://campgroundmaster.com/help/overview32.html>

When printing mailing labels or envelopes, it makes sense to exclude those who have an E-mail address if you're using E-mail when possible and only mailing hard copies if necessary.

You can use an expression in the Filter that will only include those without the '@' character in the E-mail address field, which effectively excludes any with an E-mail address.

For instance if you're in Reports / Customer Mailing labels....

Click on Reservation Filtering..., then the "Advanced Condition Expression..." button, and enter this expression exactly:

```
Find(Cust:Cust_Email, "@" ) = 0
```

Note that this will be combined with any other reservation filtering selected.

Click Save / OK... and make sure "Use reservations, with optional filtering" is selected (this won't work for customers without reservations).

Now the list should only include people without any E-mail address.

Similarly, to do the filtering when printing reservation receipts.... once you get to Print Reservation Receipts (either through Reports or from right-clicking on a tab view, Print or E-mail for All shown, etc..).... then click "Filtering..." and enter an Advanced Condition Expression as shown above.

## Filtering for Attributes on Tab Views

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<https://campgroundmaster.com/help/overview32.html>

As of version 11.1, the Site Filter has an Advanced Condition option that can be used. One example of using this is to filter your Tab Views to only show sites with certain Attributes.

For instance, if you want to only see sites with 50 Amps in the On Site tab:

In the selection list at the top (which normally shows "All Site Types", or possibly "Default"), select the "Advanced..." option (2nd from the bottom).

Click the "Advanced Condition Expression" button in the Site Filter dialog.

Enter the following line exactly as shown (copy/paste works best):

```
Site:Attrib_50A = .T.
```

Note that there must be spaces around the = sign (and nowhere else).

Click Save, then OK. Now it will only show the sites with 50A set. Of course you can use any other field / conditions as long as it's only Site fields (you can't filter which Reservations are shown this way).

You can also use this function in the Default filter so it's part of the default site list.

## Fixing the Notice text overlapping transactions on receipts

There are a few different factors in the notice message overlapping transactions. Look into each one to decide which solution is best for your situation.

1. The starting position of your notice (inches above the bottom), in the Notices... settings . If possible, make that smaller.

<https://campgroundmaster.com/help/noticemessage.html>

2. The number of transactions printed on the receipt --- you can use a "Print only some..." option when printing (instead of "Print Reservation Receipt (ALL)") to avoid printing the whole history.

<https://campgroundmaster.com/help/printingreceipts.html>

This can also be set as the default if you're auto-printing the receipts.

<https://campgroundmaster.com/help/transactionoptions.html>

3. The number of transactions per page, as defined in the Forms Setup ("Trans Rows/page").

<https://campgroundmaster.com/help/editingforms.html>

## Reporting Transactions made last year for this year's Reservations

It's fairly common to need to list the transactions for future reservations that were entered in the past, e.g. charges entered last season for this season's reservations. It's possible to do this using the filtering function on the Transactions tab view. This also works for any date ranges of reservations and transactions -- for instance if you need transactions made from January 2020 to June 2021 for reservations staying in July 2021. Any combination can be done.

By the way, if you're simply wanting the more common "Deposits made for all future reservations", then that's easiest done with the **Arrivals** tab view -- just enter the appropriate date range (e.g. from today to some future date), then click on the "Options" button and select the "Deposits" column to show deposits made.

Here is an example for getting a detail list of prior transactions for reservations starting after a particular date:

1. Go to the "Transactions" Tab View (*not* the Transactions menu item).

2. Click the "Detail Options" button, then "Reset the view to details / all transactions", and "Save".

3. Click the "More Filters" button, select the transaction types needed (e.g. Taxes, Deposits, etc.) and any other preferences. Don't close it yet.

4, Click the "Sites/Reservations" button, select the box for "Filter by date", select "Start Date", and enter the desired From and To *Reservation* date range (e.g. this year, in which case the To date will be in the future). Click OK and OK again to close the filters.

5. Now just set the main "From" and "To" range at the top of the report for the *Transaction* dates needed (e.g. last year).

If you want it in summary form, you can click "Summary Options" and select Monthly. However, be careful not to select any of the Quick-Reports. That will reset the filter and lose all of the settings made above.

### Getting the "Apply changes from logs" option back

Prior to version 11.3, if Campground Master noticed changes in the log files that are not in the database (due to restoring an older database or an improper shut-down), it would show a prompt "Changes are present in the logs that are not in the database.... Apply changes?" Since this warning was sometimes ignored or incorrectly answered "No", causing in data loss, version 11.3 was changed to skip the prompt and always apply the changes automatically instead of asking. This is what you want it to do in most cases (after all, why would you want to "lose" changes?). We receive a lot of calls from customers saying that some data was lost, and it's almost always because they did not answer this prompt correctly.

However, there are some cases where you might want to keep it from applying the missing changes:

- Some disastrous change was made that you want to undo by restoring from a backup.
- Something is corrupt in the log files or other situation where it locks up the system when trying to apply changes.

Therefore there are still a couple ways to get the original prompt back so you can answer "No" if needed:

1. Close Campground Master if it's open, then restart it (e.g. from the desktop icon) while holding the **Shift** key down. Make sure you press the Shift key before clicking the icon, and hold it down until Campground Master is fully started (a prompt appears or you see the Rack screen showing that the database is loaded). This is a temporary function -- it will re-enable showing the prompt when appropriate until you close Campground Master again.

2. You can permanently restore the prompt by adding a setting in the Campground Master.ini file (found in the C:\Users\Public\Public Documents\Campground Master\ folder). Add the following line in the [Main] Section:

```
PromptApplyChanges=1
```

If you're not familiar with editing .ini files, please have your computer tech do it.

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