Newsletter #15 (Oct 28, 2005)

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What's New

Firewall Configuration for Networking

If you're using the Networking functionality of Campground Master, you may have run into connection issues due to firewalls blocking the communications. With several common software packages adding firewalls automatically (including Windows XP's auto-updates), it's difficult to avoid them -- but it's fairly simple to work around them and get Campground Master to work.

We've added a firewall configuration guide to the documentation, available now on the web site:
http://CampgroundMaster.com/help/firewall.html

This contains some basic information about firewalls, as well as an illustrated step-by-step guide for the 4 most common programs: Windows Firewall (in XP), ZoneAlarm, Norton Internet Security and McAfee Personal Firewall.

In case you want something to print out and keep handy, we've also added it to the printable manual which you can download from our web site. The firewall section is 3 pages (without illustrations), and can be found in the Network Functions chapter. Just download it and print out those specific pages -- currently, print pages 314 to 317, but this could change if other manual updates are made.
http://CampgroundMaster.com/zip/campgroundmaster.pdf

If you prefer the illustrated version, you can download the e-Book version of the manual and keep it handy on your computer:
http://CampgroundMaster.com/zip/campgroundmaster_help.exe

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 cancelling 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 "Into 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 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.

Miscellaneous

Software for E-mailing to Your Customer List

We're often asked about sending E-mails to all of the customers in the database, for announcing special events and so forth. You may be wondering why Campground Master can't do this. Well, there are a couple of reasons -- it opens the door for potentially being labelled as a "spamming" program (we don't want to deal with these kinds of issues), and also there are enough other products that do the job well that it makes sense to not spend our time reinventing the wheel (there are so many other things that our customers are requesting).

We recommend the software that we use for our own mailings -- Group Mail Plus, by Infacta. Go to http://www.infacta.com for more information. It can import your customer E-mail list (with names, etc.) after you export the data from Campground Master. (Exporting a list of customers with E-mail addresses was covered in Newsletter #4.)

PLEASE! -- Don't be tempted to just dump a list of E-mails into your Outlook address book and send everybody a message that way. For one thing, this is how viruses are usually spread ("worm" programs grab all of the E-mail addresses in your Outlook history and distribute spam and viruses to them), so it's not a risk you really want to expose to all of your customers. Worse yet, if you just use "cc" to send copies to them all, then every one of your customers will be able to see the address of all of your other customers -- a very inconsiderate practice, not to mention exposing them to thousands more potential virus-spreaders even if your own computer is perfectly safe.

Using the Group Mail software, you can send E-mails to each customer without exposing them to any undue risk, and you can also customize each E-mail by including their name and other details.