Newsletter #31 (May 24, 2008)

Contents

What's New

Version 4.3.3 released

A new release is available, version 4.3.3 (a few patch releases were made after 4.3). While 4.3 is considered a "minor" release, it actually contains a large number of changes. If you're a customer and have not received an update notification, please contact us to make sure we have your current E-mail contact information.

One of the more important changes is the PCI compliance for handling credit card information. "PCI Compliance" has to do with a new set of rules in the credit card industry which stipulate what information can and cannot be stored on a computer. If you enter credit cards in your database, even if you don't process them through the software, it's important that you understand the risks of not following PCI compliance guidelines or using software that's not compliant. **You could be subject to large fines if your sensitive data gets in the wrong hands.** We have updated our software to follow the PCI Compliance rules by default, but because some of these create inconveniences we have added options to disable certain restrictions if you decide that the convenience is worth the risk.

For more information on this and a complete list of changes in this release, see the Release Notes on the Downloads page of our web site, and the documentation here:
http://campgroundmaster.com/help/creditcardsecuritysetup.html

Q & A

Retrieving credit card information

Q: After upgrading to the 4.3.3 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.

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\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: Campground Master doesn't keep track of E-mails sent, so 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 / Online Setup / SMTP Setup.

Reporting taxable sales

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 they can be separated this way. 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. For instance if Sales Tax shows $100 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.

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 Item 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

Adding a custom "Thank You" message on receipts

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

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

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

In a networked setup, you may occasionally need to change which computer is being used as the Master -- for instance if the previous Master computer isn't working. This is easy to do, but it's also easy to cause problems if it's not done correctly. Follow these steps for a clean switch over.

1. At the computer you're going to use as the new Master, do a "Request full database refresh" under the Network functions, to make sure it's fully in sync. Actually it's a good idea to do this on all workstations, just don't do them all at once (wait for one to finish and refresh the screen before moving to the next).

2. Make a note of the workstation ID of the one that will be the new Master (See "This workstation's ID" under

Network Functions / Network Setup) This will be the new Master workstation ID. Also make a note of its IP address (Network Functions / Show IP address(es) for this workstation). You will need to enter these numbers into all of the other local workstations.

3. Now you're ready to make the switch, which should only be done when nobody else is using the system. This should only take a couple minutes, not counting any router configuration that might be needed for a remote connection. Starting with the new Master that you just looked at in step 2, go into Network Setup and change the "Master (server) workstation ID" to the ID # noted in step 2. Now that the "Master" ID is the same as "This" workstation's ID, that computer is a Master. At the moment, that means there are 2 computers operating as a Master (and thus they are operating independently -- that's why this needs to be done when nobody is using any of the computers.

4. Now in each of the other workstations (including the old Master, if it's functional), go into Network Setup, change the "Master (server) workstation ID" to that same number, and also enter the IP address of the new Master computer (also from step 2). They should immediately connect to the new Master when you click OK to save the changes.

Remote computers -- Once all local workstations are reconfigured as above, any remote computers to be reconfigured the same way as the local workstations (change the master workstation ID #). If the new Master is still in the same location (internet IP) as the old one, then that setting won't change -- but you'll need to reconfigure the router to forward port 6010 to the new Master computer's IP address. However if you have changed the Master from being at one location to another location (on the internet), then of course the IP address will be different because the "internet" IP address is different. If you don't know the internet IP address of the new Master, you can get this through WhatIsMyIP.com.   You'll also need to make sure the router(s) in the new Master's location are configured properly to port forward port 6010 to the new Master.

Reminder -- At no time is the "This workstation's ID" number changed on any workstation. This should never be changed (except for when installing a new computer), because it can cause synchronization problems.

Solving network synchronization troubles

In a networked setup, occasionally you may have a computer that gets stuck on "Synchronizing with server", or for whatever reason takes an overly long time to connect and synchronize every time. This is usually due to there being too many changes in the logs for it to catch up in a timely manner, or some other out-of-sync situation. It may even be that all computers are acting sluggish due to one computer being out of sync (or even if one computer is disconnected for an extended period).

There's an "easy" fix, but it's possible that you could lose data that was entered on the problem computer(s). If the Master doesn't appear up to date, give us a call and we'll see if something can be done. If you're absolutely sure that the data on the Master computer is up do date, including everything that was done on this problem computer before this problem, then you can do this:

1. On the Master computer, log in as an administrator, and go to Maintenance / Network Functions / Network Setup.

2. Click on the Diagnostics tab, and click "Delete ALL log files".

3. Shut down the program on the Master computer.

4. Start up the problem computer. It will not be able to connect of course, so it won't get stuck synchronizing.

5. Log in as an administrator, and go to Maintenance / Network Functions / Network Setup.

6. Click on the Diagnostics tab, and click "Delete ALL log files".

7. Repeat steps 4 through 6 for any other computers that were slow or could not connect.

8. Now start up the Master. If the problem computer doesn't automatically connect (it should within about 30 seconds), you can go to Maintenance / Network Functions / Connect to Server.

After it connects, it will probably do full database refresh. If it doesn't, then do Maintenance / Network Functions / Request a full database refresh. If the logs for more that one computer were deleted, then you should probably keep the program shut down on the other computers at first, bringing only one back online at a time and waiting 10 or 15 minutes to make sure it gets back in sync.