Newsletter #41 (May 26, 2014)

Contents

A few 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 not to do 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. In fact it's so easy to find if you just look and yet such an annoyance for support to have to spend time answering over and over that we're considering charging a service fee for anyone who has to ask. You'll need this information eventually, so make a note of how to find it now so you don't have to ask later. See our web site under Support / Installing on a new computer.

What's New

Upcoming new version?

Yes, it has been awhile since we've released a new version (and even longer since the last newsletter). There haven't been any urgent problems needing to be corrected, which is a good thing. Of course the wish list of things we want to add and improve (and what our customers would like to see) is always getting longer. The good news is that some of the most requested features can be accomplished without a new version, and are covered in the Tips & Techniques section of this newsletter.

Nevertheless, we hope to have a new version released this summer. There is a long list of possible enhancements that may or may not make it in this version, and we have yet to decide which enhancements will be included. As always, you will be notified by E-mail when the new version is released. So make sure we're kept up to date on your E-mail addresses, and make sure our E-mails are not going to your spam folder.

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.

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 abive, 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, since you can just use one rate with "# Children + # Adults" >= 5 otherwise. Note: To keep it simpler, we're assuming that you charge for more than 2 adults even if there are no children.

You'll need 3 separate rate definitions. Two of them will need "Advanced conditions", as above.

1. Extra adults : just 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 > 1

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?

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

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\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.

Automatic Backup each day to a new location

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. Free 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).

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

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 then printing both copies at once and having to tear them apart afterwards).

Disclaimer: As with all Advanced Customizations, this is programming and must be done precisely or the results can be unpredictable. Free support does not include help with getting Advanced Customizations to work beyond what is in this article and the system documentation.

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

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\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.

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

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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!