Newsletter #44 (Oct 14, 2017)

Contents

A couple quick reminders:

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

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

What's New

Version 9.1 "rev.e" bug-fix release

All current customers should have already received the E-mail notice about version 9.1 released on September 25th. If you are not yet a licensed user or you missed the announcement, you can read about the new features in the Release Notes:
http://www.campground-master.com/rel91/index.html

However, there were a few bugs found in the initial release, mostly dealing with the new E-mail features. Any known issues have been fixed and a new "9.1 rev.e" release is available as of October 9th (see release notes above for a list of the additional fixes since the initial release). Please check Help / About Campground Master to see if your version shows "**rev.e**" -- if not, we urge you to download the new version to replace your current version.

Networking note: This will not affect networking connectivity so they don't have to be done all at the same time like major releases do. Just install on each computer when it's convenient.

The download is available any time on our web site:
http://www.campground-master.com/download_upgrade.html

Q & A

E-mail forms -- long text not wrapping

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".

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. You can get around it by clicking "Redo swipe" and then manually entering the card information (or swiping again), so it doesn't reference the previous payment and limit the amount. Note that if you get an error like "missing reference" when doing this, you'll need to contact your merchant services provider and have them enable your account for "refunds without reference".

Tips & Techniques

E-mail confirmations -- putting the customer name in the Subject

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

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 labelled "Import Forms". You need to locate the sample Forms folder, which is typically C:\Program Files\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:

<u>Sample Forms - E-mail confirmation with trans, logo</u> -- 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.

<u>Sample Forms - E-mail confirmation with trans, logo (HTML)</u> -- 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:

```
<img src="http://campgroundmaster.com/images/campground-master2.gif">
```

with a link to your logo file on your web site:

```
<img src="http://mywebsite.com/mylogo.gif">
```

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

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\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

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\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 a 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

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.

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

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.