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 10.0 rev.s released

If you're on our normal updates mailing list, you should have already received the notice last month about the new version 10.0 rev.p release (assuming you were eligible for version 10.0). If you did not get the notice, please let us know what E-mail address you would like to have notifications sent to.

However since that release a few more tweaks have been made, most notably the addition of more extensive logging for troubleshooting purposes. Since the changes since rev.p are minor and won't be noticed by most people, we did not send out another release notice -- however we do encourage you to upgrade when you get a chance. This could help us diagnose any issues you encounter in the future. You can use the new "Check for Updates" feature in Campground Master to download the new version to all the computers with Campground Master -- in Campground Master go to Help / Check for Updates, and use the Download button to download and run the installation automatically (follow the prompts). By the way, feel free to use that "Check for Updates" feature any time to see if there's a new revision.

Once installed, the version in the caption bar should show "ver. 10.0 rev.s".

For a list of the changes since the initial release, see the bottom of the release notes here:
https://campgroundmaster.com/rel10/index.html

New guides for Reports, Transactions, and Taxes

We have greatly expanded the documentation of 3 different topics that new users commonly have questions about. Seasoned users may also find them to be helpful reviews.

Reservation Transactions -- Lots of basic information in case you're not sure the best way to enter charges and payments, with details on all of the different ways to get to the Transactions dialog (and when to use each one), how to enter transactions once you get there, how to print a receipt, etc.
https://campgroundmaster.com/help/transactionsreservations.html

Common Reports quick-reference -- A list of the most commonly needed reports and how to get to them, in the categories of Financial, Statistical, and Reservations.
https://campgroundmaster.com/help/overview5.html

Taxes Setup, Usage, Taxable Sales reporting, and more -- Much more comprehensive and detailed information about using the Taxes functionality. This updates and combines several previous articles into one location, and adds more detailed information about proper setup.
https://campgroundmaster.com/help/taxessetup.html

Q & A

Re-doing a meter reading

Note: If you did not have version 10 installed prior to entering readings, see the old article for Fixing Meter Readings.

Q. I entered meter readings and did "Add Charges...", but didn't have the settings correct so it did not add charges as expected. How do I fix this?

A. Assuming you have version 10.0 (and already had that ***before*** entering the readings), then the new Meter History and Undo Readings features will save you. You can do this even if you've already closed the Meter Reading report -- even on a later date (however the default Access Levels settings will not allow undoing readings more than 7 days old, to prevent accidentally undoing last month's readings).

1. Select (click on) the readings you want to undo -- e.g. click on the reading value for all sites in the Meter Report that need fixed (use Ctrl-Click to select multiple).

2. Click the "Undo readings..." button.

3. Confirm the prompt. If any of them did add charges, you will also be asked if you want to undo the charges. This can be helpful if the problem was that it added incorrect charges, e.g. the wrong reading was entered or your Rates were not set up correctly.

4. Now it should show the previous reading for each site. You can simply go through and re-enter the new readings as before (after fixing your settings to add charges correctly of course).

Keeping it from recalculating after manual changes

Q: How can I keep it from automatically replacing charges I've deleted to make adjustments, without always going to Reservation Details and disabling the "Recalculate" option?

A: Campground Master knows which transactions were added automatically through Auto-rates, and will always keep checking to see if the correct Auto-rates are present as long as you have the option selected in Maintenance / Program Options / Auto-Rates, "Automatically recalculate charges whenever reservation details are changed". While you could disable that feature, this would stop if from adding new charges or making corrections when it's supposed to, such as extending the reservation or changing to a different-priced site.

The correct way to handle it is to ***never*** delete the Auto-charges (which are in blue) -- always leave those alone. If you want to make a manual adjustment for some reason, do it by ***adding*** transactions (Charges or Discounts) to make the price adjustment as needed. Auto-rates ignores any manually-added transactions (which will be in white), so it won't recalculate as long as its original auto-rates charges are still there.

Moving a security deposit to a new reservation

Q: A seasonal resident wants us to hold their security deposit from last year over to the new year, but we make a new reservation each year. How do I move their security deposit to the new reservation?

A: There is no way to just "move" transactions, and besides this would cause an imbalance on the old reservation (since they are presumably paid in full now, including the deposit). So this is a 3-step process:

1. In the old reservation, select the original Security Deposit charge (the Charge transaction, not the payment), and click "Reverse Charges". This part is the same procedure as if you were going to refund it. This should leave a credit balance.

2. Go to the new reservation for next year, and enter a new Security Deposit charge.

3. Use "Transfer Pmt" to transfer a payment in the amount of the security deposit from the old reservation to the new one. If you're doing this starting in the new reservation's Transactions, remember you have to select "To" in the top part of the Payment Transfer (since you're transferring ***to*** this reservation). Then click Find Reservation, and select the old reservation. Assuming it had a credit balance in the amount of the security deposit reversed in step 1, that should be the default amount to transfer. Otherwise enter the correct amount to transfer. Then click Save.

This all assumes that there was a Payment at some point for at least the amount of the security deposit. In some cases that may have been done instead as a Deposit, which can be more problematic since the Deposit was probably already Applied. In that case a Transfer Pmt won't work -- just enter a Refund transaction on the original transaction and a Payment on the new one, which will balance out. The payment method can be Cash or Other method, since it will balance out to 0 on reports anyway.

Note that it's important that you do these steps in this order, so the payment transfer is after the security deposit transactions -- otherwise the Receipts by Category report may report it as Uncategorized.

Making several reservations for one customer, different dates

Q. How do I easily make multiple reservations for a customer, for different dates (e.g. every other week) at the same time? They don't need to be linked, I want them to be billed separately each time.

A. There are a few ways you can create additional reservations for the customer. While it's possible to do it all at once while you're in New Reservation, it takes some careful manipulation of the "Linking" options each time you change the dates and select a site, since you don't want those separate stays linked together.

A couple options:

A1. It may be easiest for most users to complete one reservation so it saves the customer information, then create additional reservations for them one by one. A few different ways to proceed once the first one is made:

1. If you can see the reservation on the Rack or other tab view, right-click on their name and select "New Reservation for this customer", and proceed as usual. Repeat as needed, going back to the Rack each time.

2. Go straight to New Reservation again (e.g. click the telephone icon), enter the customer's last name and let it Find the customer, and proceed for each one (returning to the main screen and using New Reservation each time).

3. Open Customer Details for the customer, and click New Reservation. Here's a trick -- once you create one reservation and finish (closing all the way back to the main screen), use Ctrl-R to re-open the Reservation Details for the last reservation used, then click Customer Details... then New Reservation. When done it should still be in Reservation Details, just repeat as needed.

A2: OK, so maybe you want the more advanced method, for instance to link them as non-synced or non-linked all at once while in New Reservation.

Normally if you try to select the same site again on different dates while in New Reservation, e.g. using Quick-Pick or double-clicking in the grid, you can't do it because it's going to use the dates in the First/Last fields, which are the same as the current reservation, so it reports a conflict. However, you can get around this by using an alternate method to select sites and dates.

1. Click the "Linking" button to choose either "All non-synchronized" or "Not linked at all", depending on your preference. This will lock the linking type for all subsequent sites added.

2. Use **click-drag** in the grid, in the exact site/dates you want, to highlight those cells for the dates needed (usually in blue).

3. Click the "Add Selection" button. That will be added as a new, separate reservation (shown as <NEW> in the cells), linked as selected above.

4. Repeat steps 2 and 3 as needed for additional dates.

Occupancy shows more than 100%

Q: Why does the Occupancy report show more than 100% (or more than the possible number of nights)?

A: If you don't specify a Reservation Filter, it will include cancelled reservations, inquiries, and wait-listed reservations. It would also include Owner reservations if you're using those, even if they're not on site, as well as Guest reservations, which would double-up occupancy. Normally you don't want those considered as "occupied", so you need to set a filter (in addition to any other filtering you're doing).

1. On the report dialog, click "Reservation / Site Filtering".

2. In the filter, click "Reset Filtering" to make sure nothing is set by mistake (unless of course you're doing some other filtering on purpose).

3. In the "Reservation Type" list (1st list at the bottom), select all applicable types -- most notably, exclude any Guest, Owner, and Day Pass types.

4. In the "Reservation Status" list (2nd list at the bottom), select only Pending, Confirmed, Guaranteed, Checked In, and Checked Out (you can click-drag from Pending to Checked out to highlight all 5 of them at once).

5. Click OK. Then make sure the 2 boxes are checked below the "Reservation / Site Filtering" button: "Use filtering" and "Save filter to use each time".

Now generate the report (if it's not auto-generating) and you should see the correct results.

Removing the "default" filter on the Rack, etc

Q: The Rack (or other tab) always shows "Default" in the list at the top, and I have to keep changing it back to "All Site Types" to see all of my sites. How do I fix that so it always shows "All Site Types"?

A: Someone may have accidentally used "default" to select something, not really intending it to be the new default, and forgot to reset it. You need to reset the "Default" filter so it includes all sites, then it will revert to "All Site Types". So click on the "Default ..." option (which opens the Site filter dialog), click the "Reset Filtering" button, and click OK. The next time you Reset the Rack, it will go back to All Site Types (and it will remember that setting).

Remember, this is specific to each workstation, as well as each tab view, so you may need to do it multiple times.

Fixing a credit card payment entered on the wrong customer

Q: A clerk charged propane and swiped the credit card in the wrong customer account. Is there and easy fix?

A: The "simplest" would be if the customer is still available (and it's still the same day), then you could Void the payment and re-do it on the correct account.

If that's not an option:

There's no way to "move" a transaction to another customer, so one option is use Transfer Payment. However be aware that the next payment done on that wrong customer may try to bring up that same card information by default (unless you clear the credit card information from that customer using Maintenance / Credit Cards / Remove a customer's credit card information -- but that would wipe ALL card information from that customer) -- so make a Memo or other note to remind you of that.

The other option would be to Delete the payment transaction (without processing a Void), then re-enter it on the correct customer without processing it. When re-entering it you would need to either use a different Payment Method (like "Other") or disable credit card processing (under Maintenance / Credit Cards) while re-entering it so it doesn't require running the card again. Either way you would lose the card information for the payment (e.g. you may not be able to do a refund or subsequent charge without the card present again).

Different versions of Confirmation E-mail

Q. How can I create different versions of the confirmation E-mail, with different text, without changing the "E-mail confirmation text" setting each time? I've looked at the Forms but there doesn't seem to be a way to change them.

A. In order to make changes to a form or make additional copies, you need to import a "custom" version of the form that actually has elements (the default forms are "canned" versions with no elements to edit). See the documentation for this here:

https://campgroundmaster.com/help/importingandeditingsamplef.html

The samples normally pull the confirmation text from the setting you mentioned, but you can change that. Look for the Data Expression element with SettingText("Main", "EConfirmation"). Replace that with a Text element for the text you want instead of the standard setting -- just Edit the element, change the Element Type to "Text", and then Edit Text to replace the expression with the actual text you want.

Adding notes to the "Requests" column (Arrivals, etc)

Q. How do I add a note to "Requests" on the Departures tab (or Arrivals)?

A. You can't put a "note" there -- those come from the "Site Preference" fields of the reservation (also called Attributes). If you want special flags you can set to show up in the "Requests" column, you can customize one or more of the "Attribute" fields to use. Then you would just select that under the Reservation's "Site Preferences" (see the button on Reservation Details), and it would show up in the Requests column.

See "Customizing Attribute Fields" here:
http://campgroundmaster.com/help/definedatafields.html

Tips & Techniques

Filtering tab views by Reservation Type

While you can select Site Types, etc, for a tab view like On Site, there isn't a standard way to filter the tab views by Reservation Type. However it can be done using an Add-on Query. This is part of Advanced Customizations, not normally part of support, but it's pretty simple to do.

While not typically done, you can create a Query that has only a Filter Condition in it, without any actual data columns (of course if you already have a Query that you're using as an "Add-on query" for the On Site tab, then you can simply add the Resv Type condition to it).

For example:

1. Go to Maintenance / Advanced Customizations / Queries. Click Add Query.... it will prompt for the type, select List Query.

2. Enter a name like "Resv Type filter", and make sure the Base Table is "Reservations".

3. Click Edit Filtering Conditions, then Add New Condition. Type the condition as shown below, replacing "Normal" with the desired Reservation Type. Example:

```
Resv:Resv_Type = "Normal"
```

Note: Make sure the punctuation and spaces are exactly as shown (copy/paste from here if possible).

4. Click Save/Done/Close all the way out of that.

5. Now you need to select that Query in the On Site tab view. In the On Site tab, click Options. At the bottom, select the query you added above for the Query to Add.

Now it will only show that Reservation Type. Remember, though, that to get it back to showing all types you need to go back to Options and clear the selection for Query to Add. Of course you can set up as many other Queries as you want, with other Reservation Types or other conditions. Also remember that if you want to add additional fields to the query as well, then this must be combined with the filtering, since only one Query to Add can be selected at a time.

Fixing a double-charge to a credit card

Sometimes you may find that a customer's card was charged twice, but it's only shown once in Campground Master (due to aborted or timed out processing on the first one and not realizing that it really was processed).

Since it was processed again, and the customer was charged twice, there are 2 options for correcting it (these assume that the customer's Reservation Transactions currently show the "correct" amount paid, i.e. a single payment the way you want it to be).

1. You can credit one of the charges directly with the credit card company, and then just leave the existing payment in Campground Master. It doesn't really matter which payment was refunded through the credit card company, except if you need to do a further Refund later -- then it will need to reference the correct payment, so you need to make sure the one canceled is the one missing from Campground Master. This is the simplest way to do it, since nothing needs to be done in Campground Master. The customer's transactions in Campground Master will look correct, but the Receipts by Payment Method report may not match the credit card company's statement if it wasn't all done on the same day (Campground Master won't show both charges to the card and won't show the refund).

2. If you don't want to do the credit directly with the card company (or don't know how), then you can do it through Campground Master -- but then you need to add another Payment transaction to make things match up. This takes a few steps.

a. Disable credit card processing (uncheck the "Enable" box in Maintenance / Credit Cards / Processing Setup).

b. In the Reservation's Transactions, enter another Payment for the same amount -- select the credit card payment method. Don't enter a card number, and just Save it (there won't be a "Process Card" button). Now it should show a credit (negative) balance for the amount you need to credit their card.

c. If necessary, back-date the payment you entered to the proper date (when the duplicate payment was actually made).
https://campgroundmaster.com/news/back-datingtransactions.html

d. Move the new payment you entered so it's ABOVE the payment that was already there and processed correctly. To do this you need to exit out of Reservation Transactions, go to the Reservation Details for that reservation, click "Transaction History", and move up the transaction. This is important so that the Refund step below will refund the correct payment (the processed one, not the one that you just entered without processing).
https://campgroundmaster.com/help/transactionhistorydialog.html

e. Re-enable credit card processing (re-check the "Enable" box in Maintenance / Credit Cards / Processing Setup).

f. Go back to Reservation Transactions for that reservation, and click "Refund" to refund the credit card payment to their card (or if this was all on the same day so it has not settled, then use "Void selected credit card"). Make sure you can "Process" the refund or void -- If not, then either you didn't re-enable credit card processing or you don't have the processed Payment as the most recent payment. This will credit that one payment back to the customer's card.

Now it should report correctly in Campground Master and also match the statement from the processor.

Fixing Reservations Split/Linked incorrectly

We often get questions about fixing a "mess" where a customer has 2 or more reservations, perhaps as a result of doing a Split or correcting a bad split, or perhaps instead of doing the normal Split operation the operator added a Sub-member or even a whole new reservation instead. Usually the issue is because the Transactions do not show any more, or maybe they show up but the wrong site # is showing on the receipts.

A previous newsletter article mentioned one way to fix this:
https://campgroundmaster.com/help/fixingmessed-upreservations.html

Here are a couple more takes on fixing situations like this -- you may need to experiment with different methods, since the "right" way depends on exactly what was done before and what the situation is now.

"Simple" situation -- transactions are there, but wrong site showing on receipts

First, go to Reservation Details, drop down the Linked Reservations list to figure out which is the master. The asterisk indicates the one that you're looking at NOW. However, the Linked Master is the first one listed (it also shows "Linked master")

ALL transactions for a linked set of sub-members are typically on the Linked Master. So you cannot delete or cancel the linked master without losing the transactions. Having the old one be the linked master is usually caused by using "Split Reservation" but not selecting the Recommended option of making the first (old) part the sub-member. That leaves the old part as the master, with the transactions (or worse yet, choosing an option where they are not sub-members, so the transactions don't show up on any of the others).

The best (and probably only) way to correct it is to:

1. Delete the non-master reservation (e.g. the current reservation, if it's not the linked master). You may also need to delete any others that aren't the linked master, e.g that may be in the way of doing corrections to sites/dates.

2. Go back to the Reservation Details of the linked master and change the Dates and Site on that one to what the "current" one should be, so it's current again. You'll probably need to put it back to Pending so it allows changing the dates and Site (if checked out, go back to Checked in first, then back to Pending).

3. Once you get it back to where you only have one reservation, for the "current" site and dates, and it has the transactions -- In Reservation Details, use Add Sub to add the older site/dates as sub-member reservations. Of course this is optional, since past history may not matter to you any more.

Another take -- transactions missing or on the wrong reservation:

You may find that the transactions are actually on a reservation that was Canceled (e.g. in an attempt to correct things that were messed up). To find out, go to Customer Details, and then Reservation History. Look through each of the reservations listed that seem to be in the right time frame, especially if they ave a Balance you're looking for. See if it's Canceled, or Checked Out, or in some other way seems to be incorrect.

If you need to get the transactions back to a reservation with normal status and correct site/dates, it generally requires changing the one with the transactions to be the "good" one, regardless of its current status.

1. Clear out any reservations that are "in the way" (e.g. conflicting sites/dates of what you need) but don't have transactions on them -- go to Reservation Details of each one and Delete Reservation.

2. Go to Reservation Details of the one with the correct transactions.

3. Change the Site and Dates as needed to get it back to the "current" stay.

3. If it's canceled, uncheck "Canceled" to put it back to Pending.

4. Then check "Checked In" to check it back in (be sure to answer prompt to keep original dates).

5. Once you get it back to where you only have one reservation, for the "current" site and dates, and it has the transactions -- In Reservation Details, use Add Sub to add the older site/dates as sub-member reservations. Of course this is optional, since past history may not matter to you any more.